

# Mortgage Lender Taps Trilix to Create Custom Web Application Ticketing System

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Embrace Home Loans partners with Trilix to modernize existing ticketing platform and integrate with internal system



A Trilix Case Study

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### Organization Overview:

Embrace Home Loans, headquartered in Newport, Rhode Island, is one of the nation's top full-service direct mortgage lenders and bank support providers. Since 1983, the company has helped hundreds of thousands of customers purchase, refinance and consolidate high-interest debt.

### Business Challenge:

Various Embrace Home Loans internal team members utilize the company's support ticketing system to manage internal queries and deliver superior customer service. The company's help desk support staff was relying on an off-the-shelf ticket platform which "worked great," according to Director of Information Technology/VP Carlos Hernandez, but presented limitations and security concerns.

"The GUI was too crowded," he says. "While it had tons of features, most of the features were not used, and instead just cluttered the interface." The security also needed to be tightened as the platform used OpenSSL and other open source components and lacked simple options, such as Single Sign-On. What's more, the system lacked integration with the change management system.

"We were also in the market for a change control system that had management natively built-in, and very few integrated into the legacy ticket system solution we had," added Hernandez. The current system that was being used required all systems changes to go through a human pre- and post-approval process, versus users being able to make changes directly.

### Solution:

Embrace Home Loans tapped Trilix to modernize its existing platform to create a custom web application that rolled the company's support ticket system and change management platform into one integrated system capable of delivering exceptional customer service.

"When Embrace Home Loans recognized that there was no off-the-shelf solution that could meet their needs; when the choices either lacked features or had extra features they didn't need, they sought another route," says Trilix VP of Operations, Erica Davies. "We worked with them to understand their precise needs and create a technology solution that provides them a solid foundation to add additional value-add features as they seek further optimization."

### Business Gains:

The Embrace Home Loans team has enjoyed a number of benefits since deploying the new ticketing platform. Specifically, the new platform allows the company to build its own custom business rules around change management to simplify its process around SOC auditing. Previously, the team had to rely on email, Excel files and paper trails to make up those change controls.

The updated system also features a simpler, more efficient change control system—what Hernandez refers to as “the big highlight.” The new system allows Embrace Home Loans to use its own custom business logic around pre- and post-approvals to meet SOC audit standards.

In addition, the modernized system boasts:

- Tight integration with the company’s support ticket request
- Support across multiple department and capability to handle multiple queues all in one
- Enhanced security through Single Sign-On
- Tight integration with the company’s email systems and on-prem infrastructure
- Reduced constraints that were previously caused by the off-the-shelf solution

“When working with Trilix, it is evident how knowledgeable the staff is, especially when building custom web applications as complex as we did; the entire team is great,” says Hernandez. “They are true tech wizards. Multiple times, they were able to solve some complex problems and come up with other alternatives that still met or exceeded our expected results.”

“We were very happy with the end results of our new platform, and the process the entire team took us to get there—from white boarding to planning stages to the late-game testing,” Hernandez adds. “Trilix’s many years of experience in building custom applications really shines through.”