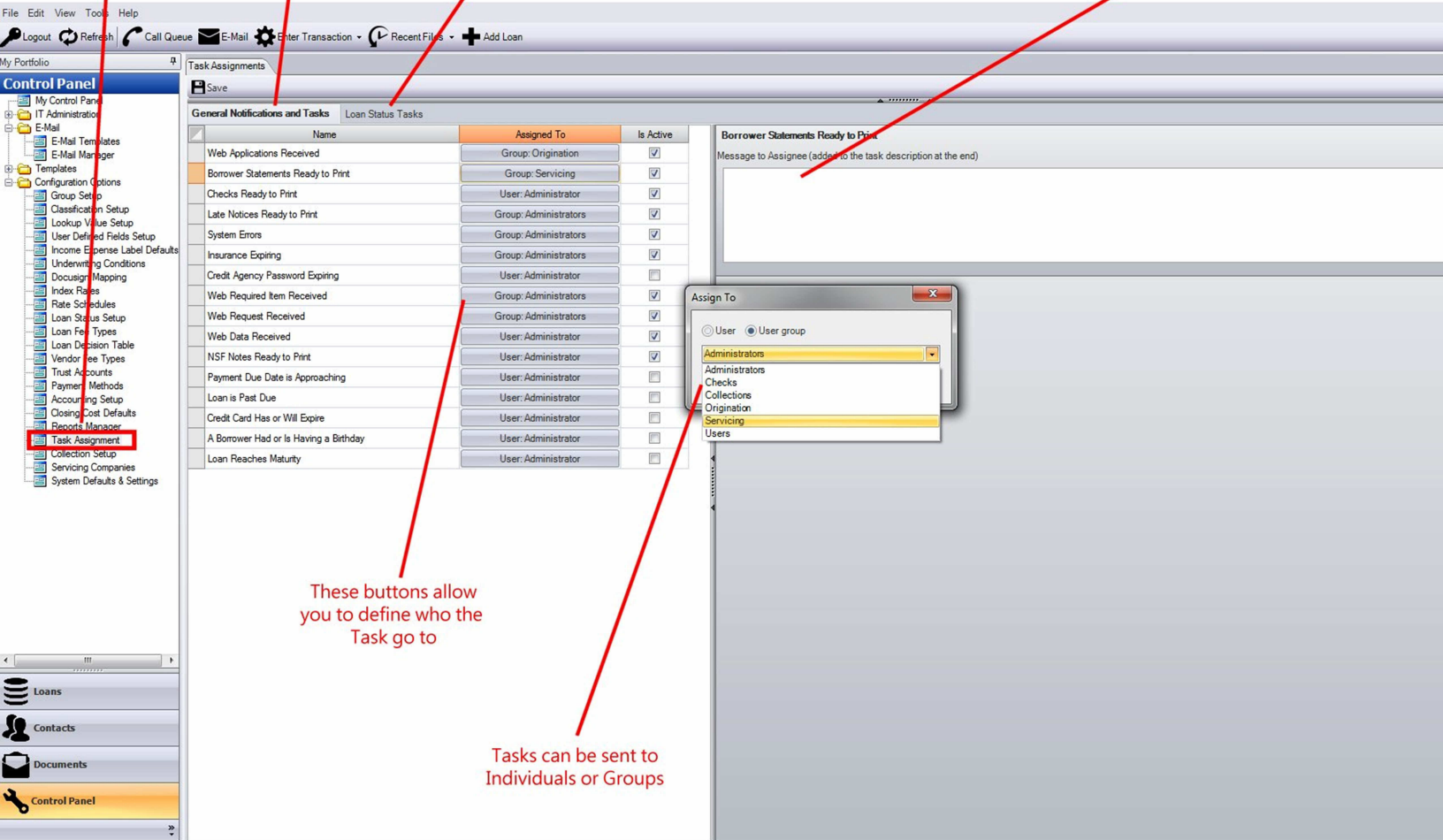**LOAN SERVICING SOFT**

Workflow and Tasks

Setup Workflow & Tasks from the Control Panel here

Tasks can triggered by System Event

Tasks can also be triggered by Loan Task

This area allows you to define the Task Message

File   Edit   View   Tools   Help

Logout   Refresh   Call Queue   E-Mail   Enter Transaction   Recent Files   Add Loan

My Portfolio

Task Assignments

Save

Control Panel
- My Control Panel
- IT Administration
- E-Mail
  - E-Mail Templates
  - E-Mail Manager
- Templates
- Configuration Options
  - Group Setup
  - Classification Setup
  - Lookup Value Setup
  - User Defined Fields Setup
  - Income Expense Label Defaults
  - Underwriting Conditions
  - Docusign Mapping
  - Index Rates
  - Rate Schedules
  - Loan Status Setup
  - Loan Fee Types
  - Loan Decision Table
  - Vendor Fee Types
  - Trust Accounts
  - Payment Methods
  - Accounting Setup
  - Closing Cost Defaults
  - Reports Manager
  - **Task Assignment**
  - Collection Setup
  - Servicing Companies
  - System Defaults & Settings

General Notifications and Tasks | Loan Status Tasks

Name	Assigned To	Is Active
Web Applications Received	Group: Origination	☑
Borrower Statements Ready to Print	Group: Servicing	☑
Checks Ready to Print	User: Administrator	☑
Late Notices Ready to Print	Group: Administrators	☑
System Errors	Group: Administrators	☑
Insurance Expiring	Group: Administrators	☑
Credit Agency Password Expiring	User: Administrator	☐
Web Required Item Received	Group: Administrators	☑
Web Request Received	Group: Administrators	☑
Web Data Received	User: Administrator	☑
NSF Notes Ready to Print	User: Administrator	☑
Payment Due Date is Approaching	User: Administrator	☐
Loan is Past Due	User: Administrator	☐
Credit Card Has or Will Expire	User: Administrator	☐
A Borrower Had or Is Having a Birthday	User: Administrator	☐
Loan Reaches Maturity	User: Administrator	☐

Borrower Statements Ready to Print

Message to Assignee (added to the task description at the end)

Assign To

○ User   ● User group

Administrators
- Administrators
- Checks
- Collections
- Origination
- Servicing
- Users

These buttons allow you to define who the Task go to

Tasks can be sent to Individuals or Groups

- Loans
- Contacts
- Documents
- **Control Panel**