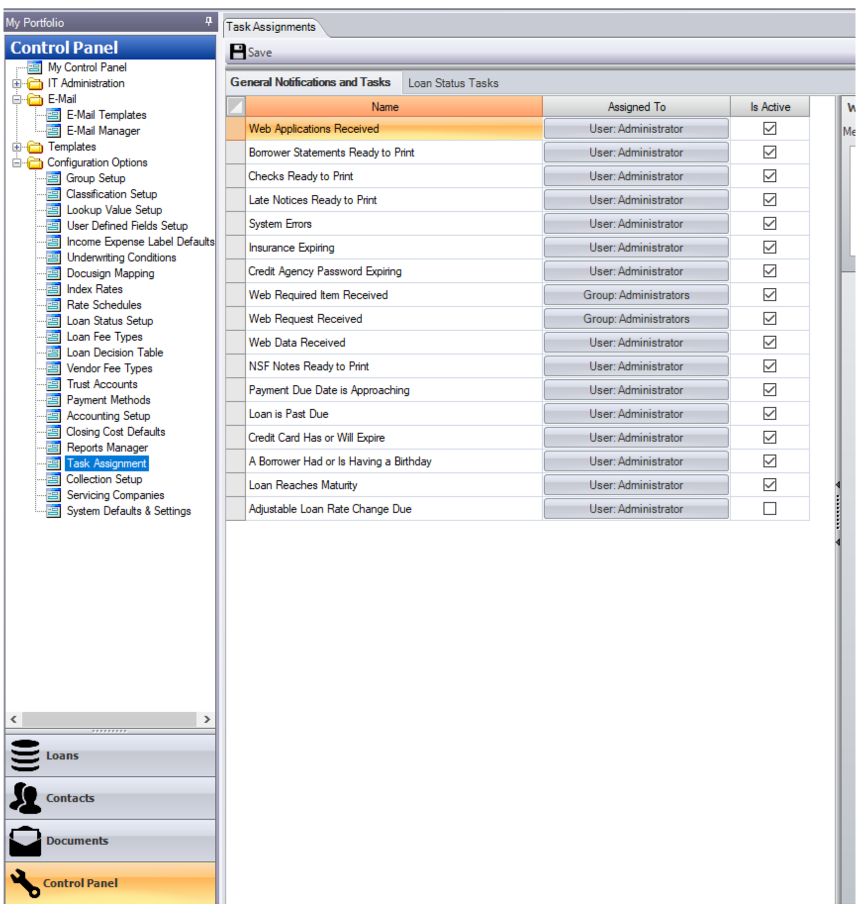
LOAN SERVICING SOFT Task Assignments

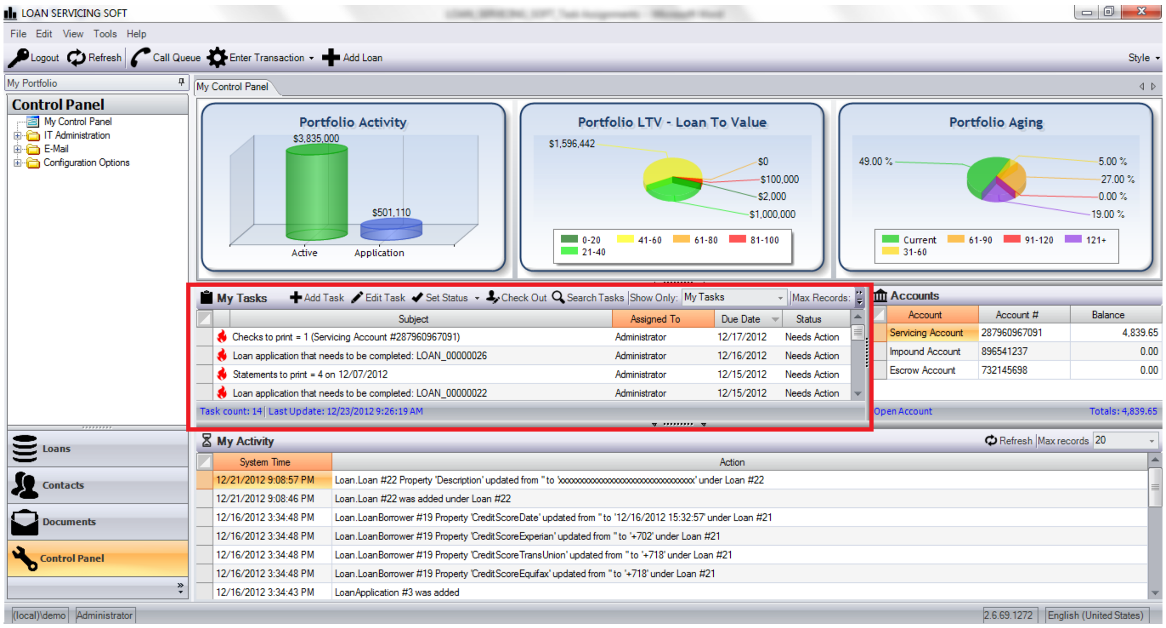
This document will guide you through the process of setting up and using task assignments in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

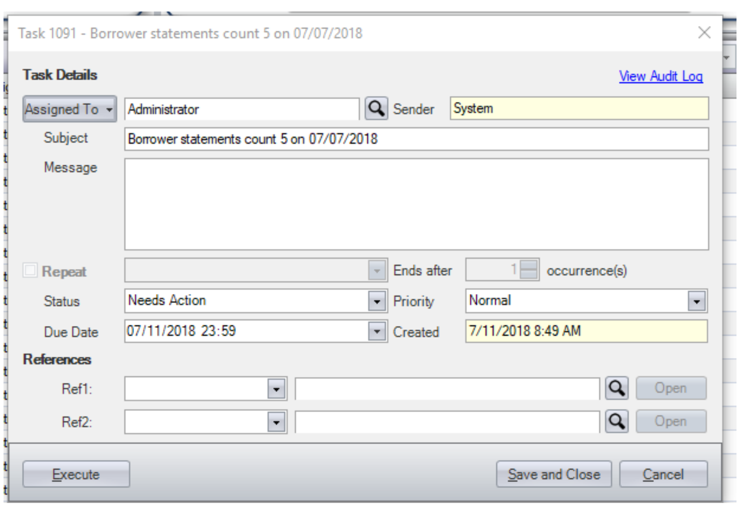
The LOAN SERVICING SOFT system manages all important tasks and "to do" items, as well as track the progress of a task until completion. Tasks can either be assigned to individuals or groups of individuals. Set up and configuration for assignment of task notifications is done on the Task Assignment screen in Control Panel under Configuration Options.



When a user or group of users receives a task, it shows up on their “My Tasks” area. To open a task, select and double click on the task.



When a task is selected, the window below appears:



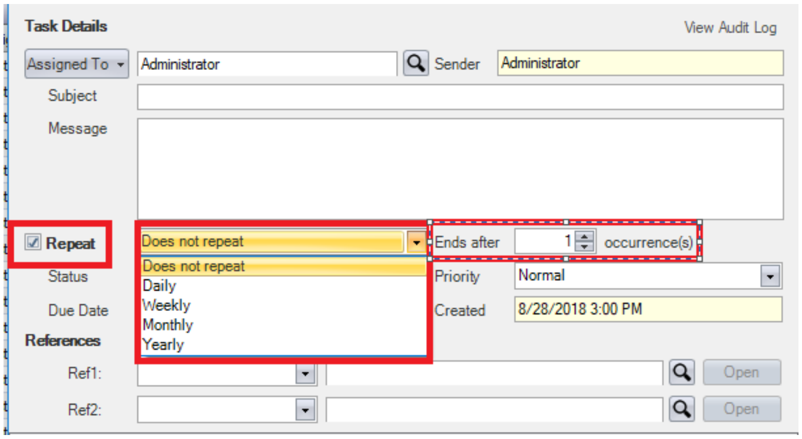
LOAN SERVICING SOFT

From the Task screen, users may edit, complete, or reassign the task to a different user or group of users. Users also have the option of adding a message to another user before assigning the task.

Reoccurring tasks for items such as printing checks, monthly statements, and late notices can be executed through the task window by selecting the "Execute" button on the bottom left corner of the screen.

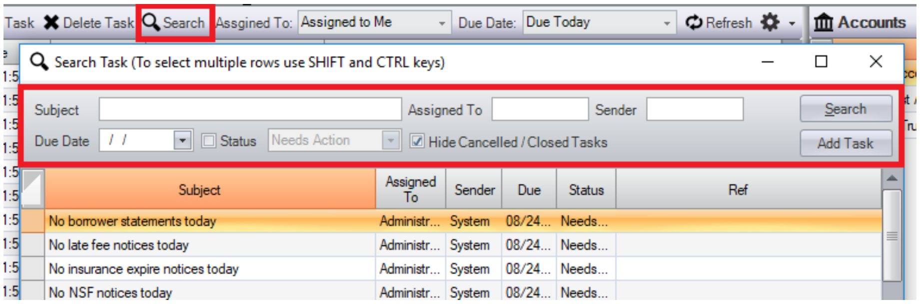
Tasks can also be attached to loans, borrowers, lenders, and vendors. For example, when a new loan application is started, but not completed, a task is created and sent to one of the users, in order to ensure the application is completed.

Finally, reoccurring tasks can also be set up to automatically generate on a future date. In order to set up reoccurring tasks, select "add task", or open an existing task that needs to reoccur, then click the "repeat" check box as shown on the image below. Next, choose whether the task should be repeated daily, weekly, monthly, or yearly. Also, there is an option where a task can be discontinued from generating after a certain amount of occurrences.



Viewing various tasks

To search for a specific task that was already created, click on the "Search" icon. This option allows the user to search for a task by subject, due date, status, assigned user, or sender.



Tasks can also be sorted by various due dates.