

## LOAN SERVICING SOFT Task Assignments

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

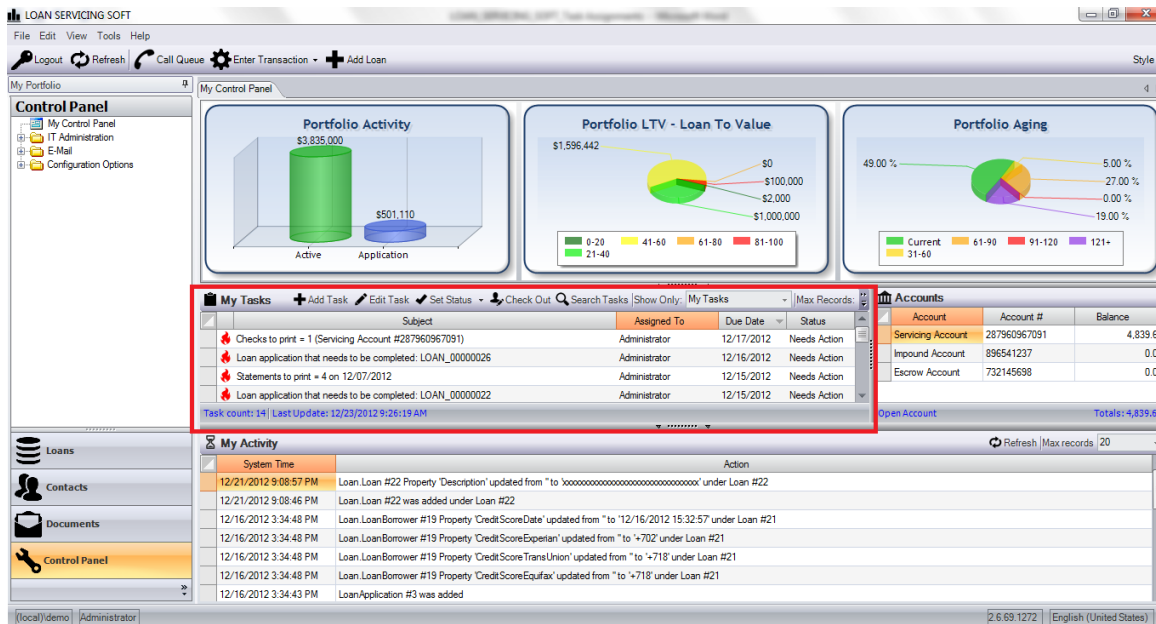
For additional information and/or questions please feel free to contact our support group at [support@loanservicingsoft.com](mailto:support@loanservicingsoft.com) or 1-800-993-1839 x2.

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.

The screenshot shows the 'Task Assignments' screen in the LOAN SERVICING SOFT application. The left sidebar contains the 'Control Panel' menu, with 'Task Assignment' selected. The main content area displays a table of tasks under the 'General Notifications and Tasks' tab. The table has three columns: 'Name', 'Assigned To', and 'Is Active'. The tasks listed are as follows:

Name	Assigned To	Is Active
Web Applications Received	User: Administrator	<input checked="" type="checkbox"/>
Borrower Statements Ready to Print	User: Administrator	<input checked="" type="checkbox"/>
Checks Ready to Print	User: Administrator	<input checked="" type="checkbox"/>
Late Notices Ready to Print	User: Administrator	<input checked="" type="checkbox"/>
System Errors	User: Administrator	<input checked="" type="checkbox"/>
Insurance Expiring	User: Administrator	<input checked="" type="checkbox"/>
Credit Agency Password Expiring	User: Administrator	<input checked="" type="checkbox"/>
Web Required Item Received	Group: Administrators	<input checked="" type="checkbox"/>
Web Request Received	Group: Administrators	<input checked="" type="checkbox"/>
Web Data Received	User: Administrator	<input checked="" type="checkbox"/>
NSF Notes Ready to Print	User: Administrator	<input checked="" type="checkbox"/>
Payment Due Date is Approaching	User: Administrator	<input checked="" type="checkbox"/>
Loan is Past Due	User: Administrator	<input checked="" type="checkbox"/>
Credit Card Has or Will Expire	User: Administrator	<input checked="" type="checkbox"/>
A Borrower Had or Is Having a Birthday	User: Administrator	<input checked="" type="checkbox"/>
Loan Reaches Maturity	User: Administrator	<input checked="" type="checkbox"/>
Adjustable Loan Rate Change Due	User: Administrator	<input type="checkbox"/>

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:

**Task 1091 - Borrower statements count 5 on 07/07/2018**

**Task Details**

Assigned To: Administrator | Sender: System | [View Audit Log](#)

Subject: Borrower statements count 5 on 07/07/2018

Message:

Repeat: ☐ Ends after: 1 occurrence(s)

Status: Needs Action | Priority: Normal

Due Date: 07/11/2018 23:59 | Created: 7/11/2018 8:49 AM

**References**

Ref1:  |

Ref2:  |

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.

The screenshot shows the 'Task Details' form. The 'Assigned To' field is set to 'Administrator'. The 'Repeat' checkbox is checked and highlighted with a red box. Below it, a dropdown menu is open, showing options: 'Does not repeat', 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Ends after' field is set to '1' occurrence(s). The 'Priority' is 'Normal' and the 'Created' date is '8/28/2018 3:00 PM'. There are also 'Ref1' and 'Ref2' fields with search icons and 'Open' buttons.

## 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.

The screenshot shows a software window titled "Task Assignments". At the top, there is a toolbar with buttons for "Delete Task", "Search", "Assigned To", "Assigned to Me", "Due Date", "Due Today", "Refresh", and "Accounts". Below the toolbar is a search bar with the text "Search Task (To select multiple rows use SHIFT and CTRL keys)". To the right of the search bar are input fields for "Subject", "Assigned To", and "Sender", along with a "Search" button. Below these fields are checkboxes for "Status" (set to "Needs Action") and "Hide Cancelled / Closed Tasks", and an "Add Task" button. The main area of the window is a table with the following columns: "Subject", "Assigned To", "Sender", "Due", "Status", and "Ref". The table contains four rows of data:

Subject	Assigned To	Sender	Due	Status	Ref
No borrower statements today	Administr...	System	08/24...	Needs...	
No late fee notices today	Administr...	System	08/24...	Needs...	
No insurance expire notices today	Administr...	System	08/24...	Needs...	
No NSF notices today	Administr...	System	08/24...	Needs...	

Tasks can also be sorted by various due dates.

The screenshot shows the same "Task Assignments" window, but with the "Due Date" dropdown menu open. The dropdown menu lists the following options: "Due Today", "Due Tomorrow", "Due In One Week", "Due In One Month", "Due In Three Months", "Due In One Year", and "All Incomplete Tasks". The table below the dropdown menu shows the following data:

id On	Due Date	Status	Reference
8 4:14 PM	06/15/18 11:59	Needs Action	
8 4:14 PM	06/30/18 11:59	Needs Action	
8 4:14 PM	07/01/18 11:59	Needs Action	
8 4:14 PM	07/03/18 11:59	Needs Action	
8 4:14 PM	07/03/18 11:59	Needs Action	
8 10:13	07/04/18 11:59	Needs Action	