


Session 5 Questions and Answers

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June 9-10, 2020 | 

Recordings can be viewed at <https://www.meridianlink.com/events/user-forum-2020>

Session 5 – LoansPQ Beta Client Roundtable: Insights with the new UI/UX

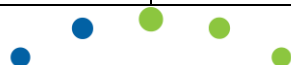
MeridianLink beta clients share their feedback with the re-designed LoansPQ user experience/user interface (UX/UI). Topics to be discussed include the use of interface features and functionality, training expectations, factors to consider when migrating, and using new design to your advantage. MeridianLink subject-matter experts are on hand to assist with the Q&A format.

Q. We are using ACTION for Indirect Lending and we are looking at switching to LoansPQ (LPQ). Can you provide more details on reporting in the modern LPQ?	A. The reporting feature is the same for modern experience and classic experience. We will improve the reporting module in the future but check out MLX Insight because it allows for a more robust reporting experience.
Q. Is Google Chrome required for the modern experience?	A. Correct. Chrome is required for both the modern experience and classic experience.
Q. Has the issue with scanning Member IDs been addressed or resolved?	A. We are still finishing development on the ID scanner item.
Q. Any timeline on when the back end will get modernized?	A. There is no specific timeline on this, but it would be after HE and BL are completed.
Q. Regarding new fields in the Indirect application, for example, contract receive date, will those fields be available for reporting?	A. Yes, we will be adding these to the reporting module.
Q. How do they leverage training new hires while the modern experience is being tested in DEMO?	A. The modern experience can be kept in BETA or turned off temporarily in DEMO when training is needed.
Q. Is anyone using a DT or R1 to test Indirect or are you manually entering Indirect apps? Is there a	A. Many of the testing clients are using a test DT/R1 to test, and we recommend that as well.

way to see how the decision flows to the dealer side?	
Q. Which Core is each panelist on?	A. Rogue Credit Union - Fiserv Summit Premier Members FCU - Sycitar University of Wisconsin CU - Fidelity Miser
Q. For testing indirect loans, does DealerTrack and RouteOne send sample apps into the Credit Union (CU) or does the CU have to create them?	A. The CU would have to create the applications.
Q. Does the modern experience use the same API requests and responses to our Cores?	A. Yes, it does. Configurations and mapping are maintained.
Q. For those that have done testing for Indirect, did they have one or two employees create the applications and then have the normal Indirect servicing staff do the actual functionality testing?	A. Yes.
Q. Are there plans to split the VL module on the back end to DVL & IVL for separate admin/setup?	A. We want to create this split in the future, but there are no imminent plans for this.
Q. Will we be able to start using classic in Google Chrome so we can switch between the two?	A. Yes.
Q. Is the LTV bug fixed from Route one and DT?	A. Please contact Support for this.
Q. Does Indirect application support all collateral types? i.e. Auto, ATV, RV, boat, or snow mobile (machine)?	A. Yes - all options are still supported.
Q. Are all the application fields/questions still the same, but in different locations?	A. Yes.
Q. Can an underwriter see a previous classic application summary using the 'View Previous Application' view in the new experience?	A. Yes. The classic 'View App Summary' window will display.
Q. What about support for the new Microsoft Edge? Will that be supported moving forward?	A. This is something we will be looking at to see if it's a possibility.
Q. Is there a certain version you must be on to migrate to the modern experience?	A. Q2 2020 code base for production.
Q. If we convert from Classic to the new LPQ, what happens to the pipeline in classic? Are those apps transferred to the new LPQ version so they can be finished there?	A. Yes, once they are opened, they will be in the modern experience and can be processed.
Q. Direct VS Indirect is not triggered until the Vehicle Info page, so how will that work if we turn on for Indirect only?	A. Apps will be created in the modern experience for CUDL, Dealertrack, or RouteOne. Additionally, you have the option to create a new Indirect app via the NEW APP menu.



Q. If we create a new Indirect app via the New App menu, does that mean the new app menu will be broken down into Indirect and Direct?	A. Correct, there are two options: Vehicle – Indirect Vehicle - Direct
Q. How will this work with Smart Approvals? Does the system have the functionality to toggle an app from the modern to the classic or vice versa?	A. Yes, the modern experience will toggle the SmartApproval app from Direct to Indirect as needed during the process.
Q. Will the modern experience affect Indirect lease applications?	A. Yes.
Q. When we changed our BETA environment, the 'create new account' button was gone and had to be set up again. Is this something that has been fixed for going LIVE?	A. Yes, it has been fixed.
Q. When adding 'unable to fund reasons,' they do not automatically add to the task list. Is there a function to add them?	A. Please contact Support for this.
Q. Is there a cost to push to live production?	A. There is no cost to enable the modern experience on any environment.
Q. Does the admin experience change or does the modern experience only show up on the applications?	A. Currently, the modern experience is only for the application. We aim to update the admin side after we roll out the modern experience for the rest of our modules.
Q. How has the experience been working with RouteOne/Dealertrack and dealerships in the modern experience? Has it been easier/better communications back and forth?	A. The RouteOne/Dealertrack integration did not change. It is a different experience for your staff.
Q. It sounds like the main idea here is to test, but are lenders running into issues and are those issues being addressed quickly?	A. The idea behind testing is primarily meant to ensure that all your workflows are maintained and to see if your training materials need to be adjusted. When issues arise, ML is committed to resolving issues quickly.
Q. Are there examples they found in testing that should be a focus area?	A. Ensuring workflow is clear and maintained and providing all connectivity to Core, and Indirect portals were working as expected.
Q. Were there any complications you had when testing? Did you have to make concessions to anything?	A. In general, the complications arose around the workflow being different and needing to adapt to where the new locations were.
Q. Is modern experience same as the new LPQ? Will there be a deadline eventually to move to modern experience or will this remain a choice to the CU?	A. Yes, it is the same. There will be a deadline in the future, but it won't be announced until all app types are completed.



Q. Will config be changing?	A. Not in the immediate future, no.
Q. What are some specific examples of process changes?	A. We will be releasing some videos in the future to overview the app workflows.
Q. If we transition from ACTION to LPQ, would we be on the modern version and never be on the classic version?	A. Absolutely! When you get started with deployment, we will work with you to deploy the modern experience.
Q. Why did both CUs choose to start with a complicated product? e.g. Indirect auto, versus something simple and personal?	A. Some FIs have different groups who only manage Indirect Lending. It is a way to roll out one product and not affect others. Also, the Indirect app is a smaller version than the Direct Vehicle Loan app.
Q. Does data access expand with the new experience as well? Will we be able to pull in the data sources and utilize that within our current Data Warehouse?	A. We do offer applications to be extracted from our system as XMLs via the Data Extract tool. This is available for both classic and modern experience. Many FIs use this tool to pull data into their data warehouse. We also offer MLx Insight as a Business Intelligence tool for Analytics.
Q. For testing Indirect Loans, does DealerTrack and RouteOne send sample apps into the CU or does the CU have to create them?	A. The CU must create the test apps in DT and R1.
Q. Is there an experience change to any of the configuration screens like 'Module Configuration,' 'Lender Preferences,' or 'Reporting?'	A. The modern experience will not affect the admin side. We will work on making changes to the admin side after we complete coding for additional applications. (i.e. XA, BL, HE)
Q. Does the modern experience include more advanced conditions?	A. It does not currently.

