<u>Session 18 Questions and Answers</u>

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

Session 18 - LoansPQ / XpressAccounts Custom App Queue Automation

Make sure the right applications are being seen by the right people at the right time, without making your users hand them off manually or waste time searching for them. Learn the features in LoansPQ and Xpress Accounts that will reduce user error and make every application hand-off fast, consistent, and automatic.

Q. Is there a way to re-assign the pending application to the underwriting queue that was already approved?	A. This should be the behavior if you are using *approved* to *pending* triggers, and have the queue set up to have filters apply when an application is re-saved.
Q. Can individuals have a Custom Queue?	A. Yes, an individual may have a custom queue. This can be accomplished by creating a custom queue with the necessary filters and giving the appropriate user permissions to only that individual on either queue users page, or that individual's user profile.
Q. Why can't someone with processor privilege claim applications?	A. There can only be one user identified as the 'Loan Officer' on an application. Claiming an application identifies that user as the Loan Officer, so this behavior prevents Processors from being recognized as the Loan Officer.
Q. Is there a way to direct an application into a queue only after it has been saved? We currently have a pending queue that shows an application as soon as it's created.	A. When building a queue when you want this behavior, select the option for apply filters when an application is re-saved, but not the option for applying filters on the initial save.
Q. For after-hours automated action that includes an email, is there a way for the emails to delay being sent until normal business hours? It is not	A. Unfortunately, Automated Actions set to run After Hours cannot be delayed. Only Automated Actions set to run real-time can be delayed.

ideal that we send so many emails (touch points) in the middle of the night.	
Q. Can we create a queue for loans taken internally over the phone and is 'up for grabs,' or does the application need to be manually assigned to another officer?	A. Yes, a custom queue can be set up to list applications in this scenario. You would do so by setting up the custom queue filters (Advanced Conditions) to look at unclaimed applications with the proper status(es) and the appropriate source.
Q. Can you create an automated action to put something in a queue based on the age of a document received through third-party integration?	A. At this time, there are no timing conditions based on document status.
Q. I have issues with people forgetting to hit the charge/transfer button in XpressAccounts (XA). Can we create a queue to catch those? I see conditions is ACH fail/pass/pending, but I don't see anything for CC.	A. We recommend trying a Custom Queue with filters that look for applications that are approved, with a funded status that is not funded.
Q. Can an application be assigned to more than one queue?	A. Yes, an application can be listed in more than one queue. Applications don't grab and hold an application. Instead, they contain applications that meet the filter criteria set up in the queue. This means an application will be in multiple queues when the filter criteria are met for each of those queues.
Q. Is there a way to use an automated action to archive a document? Example: Pre-approval letter is auto archived and made available for the member to view under manage application on Application Portal (AP).	A. Unfortunately, no. Automated Actions are unable to archive documents. However, this might be able to be handled by an Imaging Solution. Please reach out to your Partner Success Manager (PSM) to see if this would be a solution.