Session 19 Questions and Answers

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

Session 19 - The Top 3 Surprisingly Underutilized LendingQB Features

Are you still using LendingQB the same way as when you first started? If so, learn more about the top three features you should re-visit to save your organization time and money.

Q. Are we still limited to one WF editor as a user?	A. You may have a single Workflow Rules Controller at any given time. However, you have control to change who the Workflow Rules Controller is as many times as you would like, by going to General Settings > Options.
Q. If we choose to manage our own workflow rules, is it all or nothing or can we also ask LendingQB (LQB) to assist on more difficult rules we are trying to write?	A. LQB Support can help guide you on the more complex rules.
Q. What was the address to check out the integrated vendors?	A. https://lendingqb.com/partners/
Q. Are the flds available to use in workflow rules? Are questions M, M1, and M2 available now? This is the occupancy question.	A. For Declaration M, workflow supports checking if it has been filled out or not. For M1 and M2, workflow supports checking for a specific value (e.g. PR, SH, IP) as those fields are enumerated types (i.e. dropdown values).
Q. How can we get a list of the standard workflow rules that are available?	A. You may request an exported list of the latest Lean Lending workflow rule set by opening a workflow case in the Support Portal.

Q. What does the 'delete' button on the pipeline view do?	A. If you select loans from the pipeline or search screens, the 'Delete' button will delete loan files from LendingQB (LQB). The 'Delete' button will only be accessible to users with the appropriate permissions. We recommend that most users do not have permission to delete loans.
Q. Has the ability to add fields together or has any logic between them been added for pipeline or reports view?	A. Currently, the native Custom Reports and Pipeline features do not support the ability to do calculations. Only when it comes to return loan data. However, calculations based on loan fields may be done by: (1) Exporting the report to an Excel file and formulas are done in Excel, (2) Using a Batch Export Report (BER) to do the calculations, or (3) Using the SQL Data Subscription Service to house a copy of loan file data on a local database and running queries on your local database.
Q. Is there vendor integration with LPQ as well as LQB?	A. If you are a current LPQ client, we recommend reaching out to your Partner Success Manager for more information. If the question is in regards to an integration between LendingQB and LoansPQ, we recently added functionality such as : (1) Ability to create XpressAccounts and prefill with information from the LQB loan file, (2) Within the LQB loan file, search for other applications in-flight for that borrower/member within LQB and LPQ, and (3) LPQ Core Lookup to import member data from the core system into the LQB loan file.