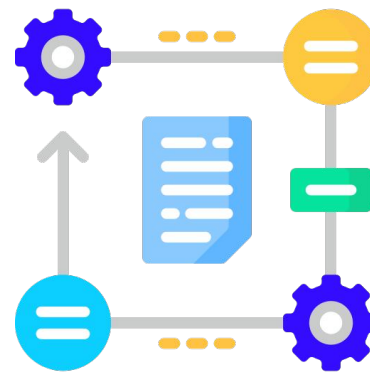




# Automated Workflow Engine Use Cases



## Automated Reviewer Assignment by CU Score Rule

This workflow automation rule allows admins to create flexible, CU score-based assignments to streamline the order review process. For instance, admins can configure the system to assign orders to a designated reviewer when a CU score meets certain conditions, such as “equal to 2” or “greater than 3.” Alternatively, admins may set the rule so that if the CU score is less than 2, indicating a high-quality score, the order can skip the review step and move directly to the next stage.

This customizable rule empowers admins to tailor review assignments to their operational needs, ensuring that time and resources are focused where they’re most valuable.

Review Tool Score		
Type	Operator	Value
CU Score	Equals To	2



<input checked="" type="checkbox"/> Assignment To Reviewer ?
Reviewer*
Aaron Greaver

Review Tool Score		
Type	Operator	Value
CU Score	Less than	2



Order Status
Completed
Email Options
<input type="checkbox"/> Copy Company Users on Email
<input checked="" type="checkbox"/> Share with Client and notify by Email
<input type="checkbox"/> Copy Salesperson
<input type="checkbox"/> Copy Vendor
<input type="checkbox"/> Copy Reviewer

## Automated Document Check and Follow-Up Rule

This rule streamlines the process of ensuring that all required documents are present at specific order statuses. If an order is missing certain documents at a designated status, the system automatically adds a comment specifying what's needed. The system then shares this comment with vendors or lenders, prompting them to upload the missing documents promptly.

By automating these document checks, admins save time previously spent on manual follow-ups and ensure orders move forward smoothly without delays. This rule improves communication with vendors and lenders and helps maintain a seamless workflow with minimal intervention.

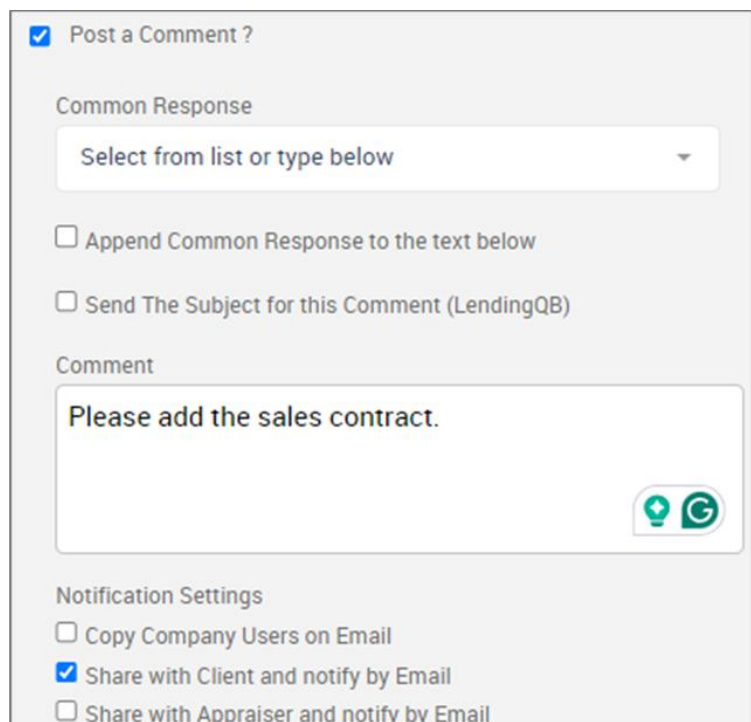


Order Status

unassigned x

Document Availability

Sales Contract x



Post a Comment ?

Common Response

Select from list or type below

Append Common Response to the text below

Send The Subject for this Comment (LendingQB)

Comment

Please add the sales contract.

Notification Settings

Copy Company Users on Email

Share with Client and notify by Email

Share with Appraiser and notify by Email

## QC-Only Product Detection and Status Update Rule

This rule is designed to streamline the quality control (QC) process by automating product-specific handling. When the system detects a designated QC-only product in an order, it skips the typical assignment step and automatically moves the order to the “File in Review” status. This ensures that the order goes directly to the QC team for necessary quality checks without manual intervention.

By setting up this rule, admins eliminate unnecessary assignments and improve process flow for QC orders, making sure that QC tasks are prioritized efficiently. This automation reduces the time spent on assigning orders and keeps the focus on essential QC tasks.

Product

Technical Review x



Order Status

File In Review

Email Options

- Copy Company Users on Email
- Share with Client and notify by Email
- Copy Salesperson
- Copy Vendor
- Copy Reviewer

## Flagging Orders in Payment Sending Status

To maintain visibility on payment-related orders, this rule automatically flags orders in the “Payment Sending” status and posts a comment for quick reference. This action keeps the order highlighted, alerting relevant users to any payment-related steps that may require immediate attention.

By automating this flagging process, admins help teams stay aware of payment orders without needing constant manual updates, ensuring smoother handling of payment stages.

Order Status

Payment Pending ×

Interval

Immediately  After Interval

Duration\* 2 Type\* Hours



Mark Order As

Flagged

## Missing Tracking Number Notification Rule

This rule automates follow-ups on missing tracking numbers, ensuring timely updates. If a tracking number is not available on an order, the system posts a comment and shares it directly with the lender, prompting them to provide the missing information.

Setting up this rule reduces manual checking for missing tracking information and keeps communication seamless, helping orders move forward without unnecessary delays.

Tracking Number

Available  Not Available

↓

Post a Comment ?

Common Response

Select from list or type below

Append Common Response to the text below

Send The Subject for this Comment (LendingQB)

Comment

Please provide the tracking number.

Notification Settings

Copy Company Users on Email

Share with Client and notify by Email

## Priority Change Notification Rule

When an order's priority level changes, this rule posts a comment and automatically shares it with all company users associated with the order. This ensures that any shift in priority is promptly communicated, allowing teams to adjust their focus and manage tasks effectively.

Automating priority change notifications minimizes the need for manual alerts and helps all involved users stay updated on the order's status in real-time.

Order Priority

Rush

Post a Comment ?

Common Response

Select from list or type below

Append Common Response to the text below

Send The Subject for this Comment (LendingQB)

Comment

Priority action is required

Notification Settings

Copy Company Users on Email