

# AUTO ROLE ASSIGNMENT



## WANT TO ELIMINATE THE MANUAL PROCESS OF ASSIGNING LOANS TO ENCOMPASS USERS?

The Ignite Auto Role Assignment application assigns loans to respective users based on data points in the loan. The application evaluates loan criteria and using a customizable rules engine assigns the loan to an end user. Any role within the loan can be assigned.

## COMMON USE CASES:

- Auto Assign Loan Officers to loans that originate in Consumer Connect and Loan Officer has not been determined
- Auto Assign UWers based on Loan Type, Loan Purpose, Originating Branch, Jumbo/Non-Jumbo or any other loan criteria
- Auto Assign Processors based on Branch/LO Designation
- Auto Assign Closers when CD is requested or sent
- Auto Assign Quality Control on loans with high-risk thresholds
- & many more...

## BENEFITS OF THE AUTO ROLE ASSIGNMENT APPLICATION:

- Automates the assignment process and removes all user interaction
- Eliminates the need for Managers to assign loans to users within their department
- Assigns loans to users in Round Robin format
- Users can be assigned to milestones or milestone-free roles
- Daily Loan assignments can be capped by user
- Vacation Mode to ignore assignments for users on vacation or out of the office

FOR MORE INFORMATION, OR TO SCHEDULE A DEMO CONTACT:

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