Auto Decision

Hands on Exercise

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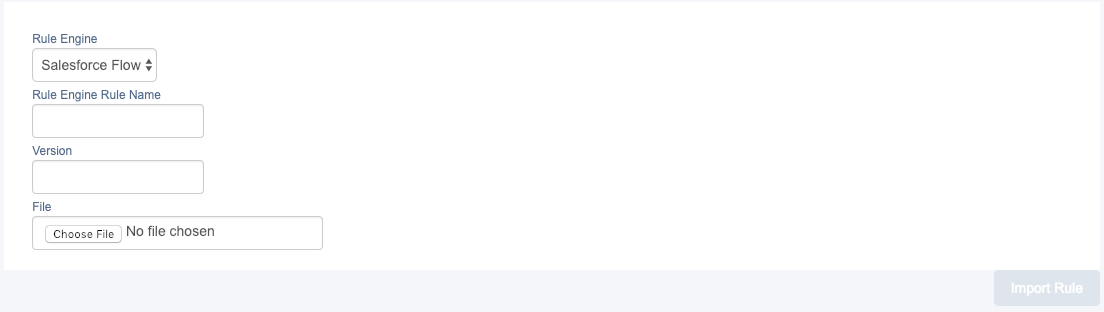
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**Note:** All items will be done in the context of Salesforce Lightning Experience.

# Importing Base Flow

1. Login to your Org ([login.salesforce.com](https://login.salesforce.com/))
2. Navigate to nCino Administration tab
3. Once there click on the magic wand.
4. Click Import Rule



1. Once on page fill out appropriate fields
   1. Rule Engine – Select (Salesforce Flow)
   2. Rule Engine Rule Name – Enter (TrainingLoanAutoDecision)
   3. Version – Enter (1.0)
   4. File – Select the file named (Salesforce\_Flow.TrainingLoanAutoDecision.2.exportedRule) from your desktop
2. Click Import Rule once all fields are filled out.

# Navigate to New Imported Flow

1. Navigate to Setup > Process Automation > Flows
2. Click Open on TrainingLoanAutoDecision

# Gather Loan Information

1. On left side drag and drop Get Records under data panel of Elements.
2. Label Node “Get Loan Information” and click tab
   1. API Name will auto populate with Get\_Loan\_Information
3. Get Records of this Object Section
   1. Enter and select LLC\_BI\_\_Loan\_\_c
4. Filter Loan Records
   1. Select “Conditions are Met”
   2. Under field enter and select Id
   3. Under Operator select equals
   4. Under Value enter and select loanId, should be under variables section.
5. Sort Loan Records
   1. Not Sorted
6. Select Only the First Record under How many records to store
7. Select Together in a record variable under where to Store Field Values
8. On Select Variable Section
   1. Click the lookup box
   2. Select New Resource
   3. Resource Type select Variable
      1. API Name = Loan
      2. Data Type = Record
      3. Object: LLC\_BI\_\_Loan\_\_c
      4. Leave unchecked input/output
      5. Click Done
9. Select Loan Fields to Store
   1. for each click “Add Row” to initiate the next field add.
      1. LLC\_BI\_\_Amount\_\_c
      2. LLC\_BI\_\_Product\_\_c
      3. LLC\_BI\_\_Product\_Line\_\_c
      4. LLC\_BI\_\_Risk\_Grade\_\_c
      5. LLC\_BI\_\_Account\_\_c
      6. Name
      7. LLC\_BI\_\_Current\_LTV\_\_c
      8. LLC\_BI\_\_Current\_Interest\_Rate\_\_c
      9. LLC\_BI\_\_Term\_Months\_\_c
10. Click **Done**
11. On the Start Node click and Drag from the white dot to connect to the new Get Loan Information Node just created.
12. Click **Save**

# Gather Account Information

1. On left side drag and drop Get Records under data panel of Elements.
2. Label Node “Get Account Information” and click tab
   1. API Name will auto populate with Get\_Account\_Information
3. Get Records of this Object Section
   1. Enter and select Account
4. Filter Loan Records
   1. Select “Conditions are Met”
   2. Under field enter and select Id
   3. Under Operator select equals
   4. Under Value enter and select Loan variable then select LLC\_BI\_\_Account\_\_c field, should be under Record Variables section.
5. Sort Loan Records
   1. Not Sorted
6. Select Only the First Record under How many records to store
7. Select Together in a record variable under where to Store Field Values
8. On Select Variable Section
   1. Click the lookup box
   2. Select New Resource
   3. Resource Type select Variable
      1. API Name = Loan
      2. Data Type = Record
      3. Object: Account
      4. Leave unchecked input/output
      5. Click Done
9. Select Loan Fields to Store
   1. for each click “Add Row” to initiate the next field add.
      1. LLC\_BI\_\_Direct\_Exposure\_\_c
      2. LLC\_BI\_\_Debt\_Service\_Converage\_\_c
10. Click **Done**
11. On the Get Loan Information click and Drag from the white dot to connect to the new Get Loan Information Node just created.
12. Click **Save**

# Gather Credit Report

1. On left side drag and drop Get Records under data panel of Elements.
2. Label Node “Get Credit Report” and click tab
   1. API Name will auto populate with Get\_Credit\_Report
3. Get Records of this Object Section
   1. Enter and select nFUSE\_Credit\_Report\_\_c
4. Filter Loan Records
   1. Select “Conditions are Met”
   2. Under field enter and select nFUSE\_\_Account\_\_c
   3. Under Operator select equals
   4. Under Value enter and select Loan variable then select LLC\_BI\_\_Account\_\_c field, should be under Record Variables section.
5. Sort Loan Records
   1. Not Sorted
6. Select Only the First Record under How many records to store
7. Select Together in a record variable under where to Store Field Values
8. Set True When no records are returned, set specified variables to null
9. On Select Variable Section
   1. Click the lookup box
   2. Select New Resource
   3. Resource Type select Variable
      1. API Name = Credit\_Report
      2. Data Type = Record
      3. Object: nFUSE\_\_Credit\_Report\_\_c
      4. Leave unchecked input/output
      5. Click Done
10. Select Loan Fields to Store
    1. for each click “Add Row” to initiate the next field add.
       1. nFUSE\_\_Credit\_Score\_\_c
11. Click **Done**
12. On the Get Account Information click and Drag from the white dot to connect to the new Get Loan Information Node just created.
13. Click **Save**

# Integration Usage

1. On left panel drag Decision onto the page where you see fit.
2. Name the Decision “Run Integrations” and click tab.
   1. Unique Name will auto populate with Run\_Integrations
3. Under Outcome Order select [New Outcomes]
4. Set Label to “Execute Integrations” then click tab
   1. Unique Name should set to Execute\_Integrations
5. In Resource field enter LLC\_BI\_\_Is\_Modification\_\_c, select the Field under the Loan record variable name.
6. In Operator field select equals
7. In Value field enter False and select $GlobalConstant.False under Global Constant section
8. Click Add Condition
9. In Resource field
   1. Click Field
   2. Select New Resource
      1. Resource Type = Variable
      2. API Name = Is\_Executable
      3. Data Type = Boolean
      4. Default Value = $GlobaleConstant.True
   3. Click **Done**
   4. Select Is\_Executable variable
10. In Operator field select equals
11. In Value field enter True and select $GlobalConstant.True under Global Constant section
12. Next, click on [Default Outcome] under Outcome Order section
13. Enter “Don’t Execute Integrations” in name field.
14. Click **Done**
15. On the Get Credit Report click and Drag from the white dot to connect to the new Run Integrations Decision Node just created.
16. Click **Save**
17. Click **Close**
18. Click **Back** next to help in the top right

# Create Integration Sub Flow

1. Click **New Flow**
2. Click **Manager** on the left Menu

## Create Initial Variables

### Constants

1. Click New Resource
2. Select Resource Type of Constant
3. Set API Name to IntegrationsFinished
4. Set Data Type to Text
5. Set Value to “Complete”
6. Click **Done**

### Record Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to creditRequest
4. Set Data Type to Record
5. Set Object to nFUSE\_\_Credit\_Report\_\_c
6. Set Available for Input to true
7. Click **Done**
8. Click New Resource
9. Select Resource Type Variable
10. Set API Name to loanInformation
11. Set Data Type to Record
12. Set Object to LLC\_BI\_\_Loan\_\_c
13. Set Available for input to true
14. Click **Done**

### Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to Results
4. Set Data Type to Text
5. Leave Default Value blank
6. Set Available for Output to true
7. Click **Done**
8. Click New Resource
9. Select Resource Type Variable
10. Set API Name to ResultDescription
11. Set Data Type to Text
12. Leave Default Value blank
13. Set Available for Output to true
14. Click **Done**
15. Click New Resource
16. Select Resource Type Variable
17. Set API Name to ResultInformationRequested
18. Set Data Type to Text
19. Leave Default Value blank
20. Set Available for Input to true
21. Click **Done**

### Saving Initial Flow

1. Click **Save**
2. Flow Label = TrainingIntegration\_LoanAutoDecision
3. Flow API Name = TrainingIntegration\_LoanAutoDecision
4. Select Type of Autolaunched Flow

## Credit Report Check

1. In the left panel click Elements
2. Drag and drop Decision Node under Logic anywhere
3. Set Label to “Is Credit Reporting Existing”
4. API Name will be set to Is\_Credit\_Reporting\_Existing
5. Under Outcome Order
6. Click [New Outcome]
7. Set Label to Credit Reporting Existing
   1. API Name will be set to Credit\_Reporting\_Existing
8. In Resource field enter and select CreditRequest
9. In Operator field select Is Null
10. In Value field enter False and select $GlobalConstant.False under Global Constant section
11. Next, click on [Default Outcome] under Outcome Order section
12. Enter “Credit Report Not Existing” in name field.
13. Click **Done**
14. On the Start Node click and Drag from the white dot to connect to the new Is Credit Report Existing Decision just created.

## Credit Report Existing

1. Click and Drag Assignment from Element panel under Logic
2. Set Label to Integrations Complete
   1. API Name will set to Integrations\_Complete
3. Set Variables Values
   1. Variable 1
      1. Variable = Result
      2. Operator = Equals
      3. Value = IntegrationsFinished
   2. Click Add Assignment
   3. Variable 2
      1. Variable = ResultDescription
      2. Operator = Equals
      3. Value = $GlobalContant.EmptyString
4. Click **Done**
5. Click the White Dot on Is Credit Report Existing Decision
6. Drag and connect to Integrations Complete Assignment Just Completed
7. Select Outcome of Credit Report Existing
8. Click **Done**

## Credit Report Not Existing

1. Drag and Drop Get Records
2. Set Label to “Get Transaction Log”
   1. API Name will set to Get\_Transaction\_Log
3. Set Object to nFUSE\_\_Transaction\_Log\_\_c
4. Filter Transaction Log Records
   1. Select “Conditions are Met”
   2. Under field enter and select nFUSE\_\_Primary\_Object\_Id\_\_c
   3. Under Operator select equals
   4. Under Value enter and select loanInformation variable then select LLC\_BI\_\_Account\_\_c field, should be under Record Variables section.
   5. Click Add Condition
   6. Under field enter and select nFUSE\_\_App\_Plugin\_\_c
   7. Under Operator select equals
   8. Under Value enter “Experian\_Credit”
   9. Click Add Condition
   10. Under field enter and select nFUSE\_\_Action\_\_c
   11. Under Operator select equals
   12. Under Value enter “Credit Verification”
5. Sort Transaction Log Records
   1. Not Sorted
6. Select Only the First Record under How many records to store
7. Select Together in a record variable under where to Store Field Values
8. Set True When no records are returned, set specified variables to null
9. On Select Variable Section
   1. Click the lookup box
   2. Select New Resource
   3. Resource Type select Variable
      1. API Name = Transaction\_Log
      2. Data Type = Record
      3. Object: nFUSE\_\_Transaction\_Log\_\_c
      4. Leave unchecked input/output
      5. Click Done
10. Select Loan Fields to Store
    1. for each click “Add Row” to initiate the next field add.
       1. nFUSE\_\_Transaction\_Status\_\_c
11. Click **Done**
12. Click the White Dot on Is Credit Report Existing Decision
13. Drag and connect to Get Transaction Log node just completed
14. Next, Drag and drop Decision Node under Logic anywhere
15. Set Label to “Is Credit Reporting Still Running”
    1. API Name will be set to Is\_Credit\_Reporting\_Still\_Running
16. Under Outcome Order
17. Click [New Outcome]
18. Set Label to Is Running
    1. API Name will be set to Is\_Running
19. In Resource field enter and select TransactionLog
20. In Operator field select Is Null
21. In Value field enter False and select $GlobalConstant.False under Global Constant section
22. Next, click on [Default Outcome] under Outcome Order section
23. Enter “Not Running” in name field.
24. Click **Done**
25. Click the White Dot on Get Transaction Log and drag to the Is Credit Reporting Still Running Decision
26. Now, Drag and drop Assignment from Logic anywhere
27. Set Label to “Integrations Still Running”
    1. API Name will set to Integrations\_Still\_Running
28. Set Variables Values
    1. Variable 1
       1. Variable = Result
       2. Operator = Equals
       3. Value = ResultInformationRequested
    2. Click Add Assignment
    3. Variable 2
       1. Variable = ResultDescription
       2. Operator = Equals
       3. Value = “Experian Request Still Running”
29. Click **Done**
30. Click the white dot on Is Credit Reporting Still Running
31. Drag and drop on Integrations Still Running Node and select Is Running
32. Click **Done**
33. Drag Apex Action under Actions anywhere
34. Under Apex Action Lookup box enter Credit
35. Select Request Credit Report
36. Set Label to “Run Credit Integration”
    1. API Name will set to Run\_Credit\_Integration
37. Under Set Inputs
    1. Toggle Account Id On
       1. Set Value to loanInformation Record Variable and select LLC\_BI\_\_Account\_\_c field
    2. Toggle Join Key On
    3. Toggle Key Value List On
    4. Toggle Plugin Name One
       1. Set Value to “Experian Credit”
38. Click **Done**
39. Click the white dot on Is Credit Reporting Still Running
40. Drag and drop onto Run Credit Integration
41. Now, Drag and drop Assignment from Logic anywhere
42. Set Label to “Integration Started”
    1. API Name will set to Integration\_Started
43. Set Variables Values
    1. Variable 1
       1. Variable = Result
       2. Operator = Equals
       3. Value = ResultInformationRequested
    2. Click Add Assignment
    3. Variable 2
       1. Variable = ResultDescription
       2. Operator = Equals
       3. Value = “Experian Request Initiated”
44. Click **Done**
45. Click the white dot on Run Credit Integration
46. Drag and drop onto Integration Started
47. Click **Save**
48. Click **Back** in the top Right

## Add Integrations Sub Flow to Master

1. Click Open on TrainingLoanAutoDecision
2. Drag and Drop Subflow from Actions section anywhere
3. In Flow box Enter TrainingIntegrationsAutoDecision
4. Set Label to “Execute Integrations”
   1. API Name will set to Execute\_Integrations
5. Set Input Values
   1. Toggle CreditRequest to On
      1. Select Credit\_Report Record Variable
   2. Toggle loanInformation to On
      1. Select Loan Record Variable
   3. Toggle ResultInformationRequested to On
      1. Select ResultInformationRequested Constant Variable
6. Store Output Values
   1. Result
      1. Select Result under Variables
   2. ResultDescription
      1. Select ResultDescription under Variables
7. Click **Done**
8. Click the white dot on Run Integrations
9. Drag and drop onto Execute Integrations and select Execute Integrations

## Integrations Complete

1. Drag and Drop Decision under Logic anywhere
2. Set Label to “Is Integration Completed”
   1. API Name will set to Is\_Integration\_Completed
3. Under Outcome Order
4. Click [New Outcome]
5. Set Label to “Integrations Completed”
   1. API Name will be set to Integrations\_Completed
6. In Resource field enter and select Result
7. In Operator field select Equals
8. In Value field enter ResultComplete
9. Next, click on [Default Outcome] under Outcome Order section
10. Enter “Integrations Not Completed” in name field.
11. Click **Done**
12. Click the white dot on Execute Integrations
13. Drag and Drop onto Is Integration Completed
14. Click **Save**

# Product Breakout

## Product Line Decision

1. Drag and drop Decision under Logic and place anywhere
2. Set Label to “Which Product Line”
   1. API Name will set to Which\_Product\_Line
3. Under Outcome Order
4. Click [New Outcome]
5. Set Label to “Commercial”
   1. API Name will be set to Commercial
6. In Resource field enter and select loanInformation Record Value and select LLC\_BI\_\_Product\_Line\_\_c field
7. In Operator field select Equals
8. In Value field enter “Commercial”
9. Next, click on [Default Outcome] under Outcome Order section
10. Enter “Product Line Not Supported” in name field.
11. Click **Done**
12. Click the white dot on Is Integrations Running
13. Drag and Drop onto Which Product Line
14. Click the white dot on Is Integrations Complete
15. Drag and Drop onto Which Product Line and Select Integrations Completed
16. Click **Save**
17. Click **Back** to right corner

## Primary Relationship Sub Flow

1. Click **New** on Flow Home page
2. Click Manager

### Create Initial Variables

#### Constants

1. Click New Resource
2. Select Resource Type of Constant
3. Set API Name to DirectExposure
4. Set Data Type to Text
5. Set Value to “Direct Exposure”
6. Click **Done**
7. Click New Resource
8. Select Resource Type of Constant
9. Set API Name to DSCR
10. Set Data Type to Text
11. Set Value to “DSCR”
12. Click **Done**

#### Record Collection Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to scorecardDetails
4. Set Data Type to Record
5. Check Allow multiple values (collection)
6. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
7. Set Available for output to true
8. Click **Done**

#### Record Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to DSCR\_ScorecardDetails
4. Set Data Type to Record
5. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
6. Click **Done**
7. Click New Resource
8. Select Resource Type Variable
9. Set API Name to Exposure\_ScorecardDetails
10. Set Data Type to Record
11. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
12. Click **Done**
13. Click New Resource
14. Select Resource Type Variable
15. Set API Name to PrimaryAccount
16. Set Data Type to Record
17. Set Object to Account
18. Check Available for Input
19. Click **Done**

#### Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to AssignedPoints
4. Set Data Type to Number
5. Set Decimal Places to 0
6. Set Default Value to 0
7. Set Available for Output to true
8. Click **Done**

### Rest of the Flow

1. Drag and Drop Decision under Logic anywhere
2. Set Label to “Evaluate Exposure”
   1. API Name will set to Evaluate\_Exposure
3. Under Outcome Order
4. Click [New Outcome]
5. Set Label to “Within Exposure Threshold”
   1. API Name will be set to Within\_Exposure\_Threshold
6. In Resource field enter and select PrimaryAccount Record Variable and select LLC\_BI\_\_Direct\_Exposure\_\_c Field
7. In Operator field select Is Null
8. In Value field enter $GlobalConstant.False
9. Click Add Condition
10. In Resource field enter and select PrimaryAccount Record Variable and select LLC\_BI\_\_Direct\_Exposure\_\_c Field
11. In Operator field select Less Than
12. In Value field enter 50000
13. Next, click on [Default Outcome] under Outcome Order section
14. Enter “Outside Exposure Threshold” in name field.
15. Click **Done**
16. Click the white dot on Start and drag and drop on new Evaluate Exposure Decision
17. Now, Drag and drop Assignment from Logic anywhere
18. Set Label to “Exposure - Pass”
    1. API Name will set to Exposure\_Pass
19. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 1
    2. Click Add Assignment
    3. Variable 2
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    4. Click Add Assignment
    5. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = PrimaryAccount Record Variable and select LLC\_BI\_\_Direct\_Exposure\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = Exposure\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = DirectExposure
20. Click **Done**
21. Click the white dot on Evaluate Exposure
22. Drag and drop on Exposure – Pass Assignment and select Within Exposure Threshold
23. Click **Done**
24. Drag and drop Assignment from Logic anywhere
25. Set Label to “Exposure - Fail”
    1. API Name will set to Exposure\_Fail
26. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 0
    2. Click Add Assignment
    3. Variable 2
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 0
    4. Click Add Assignment
    5. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = PrimaryAccount Record Variable and select LLC\_BI\_\_Direct\_Exposure\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = Exposure\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = DirectExposure
27. Click **Done**
28. Click the white dot on Evaluate Exposure
29. Drag and drop on Exposure – Fail Assignment
30. Next, Drag and Drop Decision under Logic anywhere
31. Set Label to “Evaluate- DSCR”
    1. API Name will set to Evaluate\_DSCR
32. Under Outcome Order
33. Click [New Outcome]
34. Set Label to “Above DSCR Threshold”
    1. API Name will be set to Above\_DSCR\_Threshold
35. In Resource field enter and select PrimaryAccount Record Variable and select LLC\_BI\_\_Debt\_Service\_Coverage\_\_c Field
36. In Operator field select Is Null
37. In Value field enter $GlobalConstant.False
38. Click Add Condition
39. In Resource field enter and select PrimaryAccount Record Variable and select LLC\_BI\_\_Debt\_Service\_Coverage \_\_c Field
40. In Operator field select Greater Than or Equal
41. In Value field enter 1.25
42. Next, click on [Default Outcome] under Outcome Order section
43. Enter “Below DSCR Threshold” in name field.
44. Click **Done**
45. Click the white dot on Exposure - Pass and drag and drop on new Evaluate -DSCR Decision
46. Click the white dot on Exposure - Fail and drag and drop on new Evaluate -DSCR Decision
47. Now, Drag and drop Assignment from Logic anywhere
48. Set Label to “DSCR - Pass”
    1. API Name will set to DSCR\_Pass
49. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 1
    2. Click Add Assignment
    3. Variable 2
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    4. Click Add Assignment
    5. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = Exposure\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = PrimaryAccount Record Variable and select LLC\_BI\_\_Debt\_Service\_Coverage\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = Exposure\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = DSCR
50. Click **Done**
51. Click the white dot on Evaluate Exposure
52. Drag and drop on DSCR – Pass Assignment and select Above DSCR Threshold
53. Click **Done**
54. Drag and drop Assignment from Logic anywhere
55. Set Label to “DSCR - Fail”
    1. API Name will set to DSCR\_Fail
56. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 0
    2. Click Add Assignment
    3. Variable 2
       1. Variable = DSCR\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 0
    4. Click Add Assignment
    5. Variable 3
       1. Variable = DSCR\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = DSCR\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = PrimaryAccount Record Variable and select LLC\_BI\_\_Debt\_Service\_Coverage\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = DSCR\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = DSCR
57. Click **Done**
58. Click the white dot on Evaluate Exposure
59. Drag and drop on DSCR – Fail Assignment
60. Drag and drop Assignment from Logic anywhere
61. Set Label to “Add Scorecard Details”
    1. API Name will set to Add\_Scorecard\_Details
62. Set Variables Values
    1. Variable 1
       1. Variable = ScorecardDetails
       2. Operator = Add
       3. Value = DSCR\_ScorecardDetails
    2. Click Add Assignment
    3. Variable 2
       1. Variable = ScorecardDetails
       2. Operator = Add
       3. Value = Exposure\_ScorecardDetails
63. Click **Done**
64. Click the white dot on DSCR - Pass and drag and drop on new Add Scorecard Details
65. Click the white dot on DSCR - Fail and drag and drop on new Add Scorecard Details
66. Click **Save**
67. Set Flow Label to “Evaluate\_PrimaryRelationship\_AutoDecision”
    1. Flow API Name will set Evaluate\_PrimaryRelationship\_AutoDecision
68. Set Type to Auolaunched Flow
69. Click **Save**
70. Click **Back**

## Commercial Subflow

### Create Commercial Flow

1. Click New Flow

#### Create Variables

##### Constants

1. Click New Resource
2. Select Resource Type of Constant
3. Set API Name to LoanAmount
4. Set Data Type to Text
5. Set Value to “Loan Amount”
6. Click **Done**
7. Click New Resource
8. Select Resource Type of Constant
9. Set API Name to LTV
10. Set Data Type to Text
11. Set Value to “LTV”
12. Click **Done**
13. Click New Resource
14. Select Resource Type of Constant
15. Set API Name to Rate
16. Set Data Type to Text
17. Set Value to “Rate”
18. Click **Done**
19. Click New Resource
20. Select Resource Type of Constant
21. Set API Name to RiskGrade
22. Set Data Type to Text
23. Set Value to “Risk Grade”
24. Click **Done**
25. Click New Resource
26. Select Resource Type of Constant
27. Set API Name to TermMonths
28. Set Data Type to Text
29. Set Value to “Term (Months)”
30. Click **Done**

##### Formulas

1. Click New Resource
2. Select Resource Type of Formula
3. Set API Name to RiskGradeNumeric
4. Set Data Type to Number
5. Set Decimal Places to 0
6. Set Formula to VALUE(TEXT({!loanInformation.LLC\_BI\_\_Risk\_Grade\_\_c}))
7. Click **Done**

##### Record Collection Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to Details
4. Set Data Type to Record
5. Check Allow multiple values (collection)
6. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
7. Set Available for output to true
8. Click **Done**

##### Record Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to accountInformation
4. Set Data Type to Record
5. Set Object to Account
6. Set Available for input to true
7. Click **Done**
8. Click New Resource
9. Select Resource Type Variable
10. Set API Name to CreditRequest
11. Set Data Type to Record
12. Set Object to nFUSE\_\_Credit\_Report\_\_c
13. Set Available for input to true
14. Click **Done**
15. Click New Resource
16. Select Resource Type Variable
17. Set API Name to loanInformation
18. Set Data Type to Record
19. Set Object to LLC\_BI\_\_Loan\_\_c
20. Set Available for input to true
21. Click **Done**
22. Click New Resource
23. Select Resource Type Variable
24. Set API Name to LoanAmount\_ScorecardDetails
25. Set Data Type to Record
26. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
27. Click **Done**
28. Click New Resource
29. Select Resource Type Variable
30. Set API Name to LTV\_ScorecardDetails
31. Set Data Type to Record
32. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
33. Click **Done**
34. Click New Resource
35. Select Resource Type Variable
36. Set API Name to Rate\_ScorecardDetails
37. Set Data Type to Record
38. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
39. Click **Done**
40. Click New Resource
41. Select Resource Type Variable
42. Set API Name to RiskGrade\_ScorecardDetails
43. Set Data Type to Record
44. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
45. Click **Done**
46. Click New Resource
47. Select Resource Type Variable
48. Set API Name to Term\_ScorecardDetails
49. Set Data Type to Record
50. Set Object to LLC\_BI\_\_Scorecard\_Detail\_\_c
51. Click **Done**

##### Variables

1. Click New Resource
2. Select Resource Type Variable
3. Set API Name to AssignedPoints
4. Set Data Type to Number
5. Set Decimal Places to 0
6. Set Default Value to 0
7. Set Available for Output to true
8. Click **Done**
9. Click New Resource
10. Select Resource Type Variable
11. Set API Name to MaximumPoints
12. Set Data Type to Number
13. Set Decimal Places to 0
14. Set Default Value to 0
15. Set Available for Output to true
16. Click **Done**
17. Click New Resource
18. Select Resource Type Variable
19. Set API Name to Result
20. Set Data Type to Text
21. Set Default Value to $GlobalConstant.EmptyString
22. Set Available for Output to true
23. Click **Done**
24. Click New Resource
25. Select Resource Type Variable
26. Set API Name to ResultDescription
27. Set Data Type to Text
28. Set Default Value to $GlobalConstant.EmptyString
29. Set Available for Output to true
30. Click **Done**
31. Click New Resource
32. Select Resource Type Variable
33. Set API Name to Description\_Approved
34. Set Data Type to Text
35. Set Available for Input to true
36. Click **Done**
37. Click New Resource
38. Select Resource Type Variable
39. Set API Name to Description\_Decline
40. Set Data Type to Text
41. Set Available for Input to true
42. Click **Done**
43. Click New Resource
44. Select Resource Type Variable
45. Set API Name to Description\_Manual\_Review\_Required
46. Set Data Type to Text
47. Set Available for Input to true
48. Click **Done**
49. Click New Resource
50. Select Resource Type Variable
51. Set API Name to Description\_Recommend\_Approval
52. Set Data Type to Text
53. Set Available for Input to true
54. Click **Done**
55. Click New Resource
56. Select Resource Type Variable
57. Set API Name to Description\_Recommend\_Decline
58. Set Data Type to Text
59. Set Available for Input to true
60. Click **Done**
61. Click New Resource
62. Select Resource Type Variable
63. Set API Name to ResultAutoApprove
64. Set Data Type to Text
65. Set Available for Input to true
66. Click **Done**
67. Click New Resource
68. Select Resource Type Variable
69. Set API Name to ResultAutoDecline
70. Set Data Type to Text
71. Set Available for Input to true
72. Click **Done**
73. Click New Resource
74. Select Resource Type Variable
75. Set API Name to ResultInformationRequested
76. Set Data Type to Text
77. Set Available for Input to true
78. Click **Done**
79. Click New Resource
80. Select Resource Type Variable
81. Set API Name to ResultInformationRequired
82. Set Data Type to Text
83. Set Available for Input to true
84. Click **Done**
85. Click New Resource
86. Select Resource Type Variable
87. Set API Name to ResultMannualReviewRequired
88. Set Data Type to Text
89. Set Available for Input to true
90. Click **Done**
91. Click New Resource
92. Select Resource Type Variable
93. Set API Name to ResultRecommendApproval
94. Set Data Type to Text
95. Set Available for Input to true
96. Click **Done**
97. Click New Resource
98. Select Resource Type Variable
99. Set API Name to ResultRecommendDecline
100. Set Data Type to Text
101. Set Available for Input to true
102. Click **Done**

#### Rest of the Flow

1. Click Elements
2. Drag and drop Subflow under actions anywhere on the page
3. Enter in Search Flow “Evaluate”
4. Click on the Flow that shows up called Evalue\_PrimaryRelationship\_AutoDecision
5. Set Label to “Evaluate Primary Relationship”
   1. API Name will set to Evalue\_Primary\_Relationship
6. Set Input Values
   1. Toggle PrimaryAccount to On
      1. Select accountInformation Record Variable
7. Store Output Values
   1. AssignedPoints
      1. Select AssignedPoints under Variables
   2. ScorecardDetails
      1. Select Details under Variables
8. Click **Done**
9. On the Start Node click and Drag from the white dot to connect to the new Evaluate Primary Relationship subflow
10. Drag and Drop Decision under Logic anywhere
11. Set Label to “Evaluate - Loan Amount”
    1. API Name will set to Evaluate\_Loan\_Amount
12. Under Outcome Order
13. Click [New Outcome]
14. Set Label to “Below Loan Amount Threshold”
    1. API Name will be set to Below\_Loan\_Amount\_Threshold
15. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Amount\_\_c Field
16. In Operator field select Is Null
17. In Value field enter $GlobalConstant.False
18. Click Add Condition
19. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Amount\_\_c Field
20. In Operator field select Less Than
21. In Value field enter 10000
22. Next, click on [Default Outcome] under Outcome Order section
23. Enter “Above Loan Amount Threshold” in name field.
24. Click **Done**
25. Click the white dot on Evaluate Primary Relationship Subflow and drag and drop on new Evaluate – Loan Amount Decision
26. Now, Drag and drop Assignment from Logic anywhere
27. Set Label to “Loan Amount - Pass”
    1. API Name will set to Loan\_Amount\_Pass
28. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 1
    2. Click Add Assignment
    3. Variable 2
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    4. Click Add Assignment
    5. Variable 3
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Amount\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = LoanAmount
29. Click **Done**
30. Click the white dot on Evaluate - Loan Amount
31. Drag and drop on Loan Amount – Pass Assignment and select Below Loan Amount Threshold
32. Click **Done**
33. Drag and drop Assignment from Logic anywhere
34. Set Label to “Loan Amount - Fail”
    1. API Name will set to Loan\_Amount\_Fail
35. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 0
    2. Click Add Assignment
    3. Variable 2
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 0
    4. Click Add Assignment
    5. Variable 3
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Amount\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = LoanAmount\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = LoanAmount
36. Click **Done**
37. Click the white dot on Evaluate – Loan Amount
38. Drag and drop on Loan Amount – Fail Assignment
39. Drag and Drop Decision under Logic anywhere
40. Set Label to “Evaluate - Rate”
    1. API Name will set to Evaluate\_Rate
41. Under Outcome Order
42. Click [New Outcome]
43. Set Label to “Below Rate Threshold”
    1. API Name will be set to Below\_ Rate \_Threshold
44. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Current\_Interest\_Rate\_\_c Field
45. In Operator field select Is Null
46. In Value field enter $GlobalConstant.False
47. Click Add Condition
48. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Current\_Interest\_Rate \_\_c Field
49. In Operator field select Less Than
50. In Value field enter 5
51. Next, click on [Default Outcome] under Outcome Order section
52. Enter “Above Rate Threshold” in name field.
53. Click **Done**
54. Click the white dot on Loan Amount - Pass and drag and drop on new Evaluate - Rate Decision
55. Click the white dot on Loan Amount - Fail and drag and drop on new Evaluate - Rate Decision
56. Now, Drag and drop Assignment from Logic anywhere
57. Set Label to “Rate - Pass”
    1. API Name will set to Rate\_Pass
58. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 1
    2. Click Add Assignment
    3. Variable 2
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    4. Click Add Assignment
    5. Variable 3
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Current\_Interest\_Rate\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = Rate\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = Rate
59. Click **Done**
60. Click the white dot on Evaluate - Rate
61. Drag and drop on Rate – Pass Assignment and select Below Rate Threshold
62. Click **Done**
63. Drag and drop Assignment from Logic anywhere
64. Set Label to “Rate - Fail”
    1. API Name will set to Rate\_Fail
65. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 0
    2. Click Add Assignment
    3. Variable 2
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 0
    4. Click Add Assignment
    5. Variable 3
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = Rate\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Current\_Interest\_Rate\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = Rate\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = Rate
66. Click **Done**
67. Click the white dot on Evaluate – Rate
68. Drag and drop on Rate – Fail Assignment
69. Drag and Drop Decision under Logic anywhere
70. Set Label to “Evaluate LTV”
    1. API Name will set to Evaluate\_LTV
71. Under Outcome Order
72. Click [New Outcome]
73. Set Label to “Above LTV Threshold”
    1. API Name will be set to Above\_LTV \_Threshold
74. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Current\_LTV\_\_c Field
75. In Operator field select Is Null
76. In Value field enter $GlobalConstant.False
77. Click Add Condition
78. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Current\_LTV\_\_c Field
79. In Operator field select Greater Than or Equal
80. In Value field enter 80
81. Next, click on [Default Outcome] under Outcome Order section
82. Enter “Below LTV Threshold” in name field.
83. Click **Done**
84. Click the white dot on Rate - Pass and drag and drop on new Evaluate LTV Decision
85. Click the white dot on Rate - Fail and drag and drop on new Evaluate LTV Decision
86. Now, Drag and drop Assignment from Logic anywhere
87. Set Label to “LTV - Pass”
    1. API Name will set to LTV\_Pass
88. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 1
    2. Click Add Assignment
    3. Variable 2
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    4. Click Add Assignment
    5. Variable 3
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Current\_LTV\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = LTV\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = LTV
89. Click **Done**
90. Click the white dot on Evaluate - Rate
91. Drag and drop on Rate – Pass Assignment and select Above LTV Threshold
92. Click **Done**
93. Drag and drop Assignment from Logic anywhere
94. Set Label to “LTV - Fail”
    1. API Name will set to LTV\_Fail
95. Set Variables Values
    1. Variable 1
       1. Variable = AssignedPoints
       2. Operator = Add
       3. Value = 0
    2. Click Add Assignment
    3. Variable 2
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 0
    4. Click Add Assignment
    5. Variable 3
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
       2. Operator = Equals
       3. Value = 1
    6. Click Add Assignment
    7. Variable 3
       1. Variable = LTV\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
       2. Operator = Equals
       3. Value = loanInformation Record Variable and select LLC\_BI\_\_Current\_LTV\_\_c field
    8. Click Add Assignment
    9. Variable 4
       1. Variable = LTV\_ScorecardDetails Record Variable and select Name Field
       2. Operator = Equals
       3. Value = LTV
96. Click **Done**
97. Click the white dot on Evaluate LTV
98. Drag and drop on LTV – Fail Assignment
99. Drag and Drop Decision under Logic anywhere
100. Set Label to “Evaluate – Risk Grade”
     1. API Name will set to Evaluate\_Risk\_Grade
101. Under Outcome Order
102. Click [New Outcome]
103. Set Label to “Below Risk Grade Threshold”
     1. API Name will be set to Below\_Risk\_Grade\_Threshold
104. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Risk\_Grade\_\_c Field
105. In Operator field select Is Null
106. In Value field enter $GlobalConstant.False
107. Click Add Condition
108. In Resource field enter and select RiskGradeNumeric
109. In Operator field select Less Than
110. In Value field enter 5
111. Next, click on [Default Outcome] under Outcome Order section
112. Enter “Above Risk Grade Threshold” in name field.
113. Click **Done**
114. Click the white dot on LTV - Pass and drag and drop on new Evaluate - Risk Grade Decision
115. Click the white dot on LTV - Fail and drag and drop on new Evaluate – Risk Grade Decision
116. Now, Drag and drop Assignment from Logic anywhere
117. Set Label to “Risk Grade - Pass”
     1. API Name will set to Risk\_Grade\_Pass
118. Set Variables Values
     1. Variable 1
        1. Variable = AssignedPoints
        2. Operator = Add
        3. Value = 1
     2. Click Add Assignment
     3. Variable 2
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     4. Click Add Assignment
     5. Variable 3
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     6. Click Add Assignment
     7. Variable 3
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
        2. Operator = Equals
        3. Value = loanInformation Record Variable and select LLC\_BI\_\_Risk\_Grade\_\_c field
     8. Click Add Assignment
     9. Variable 4
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select Name Field
        2. Operator = Equals
        3. Value = RiskGrade
119. Click **Done**
120. Click the white dot on Evaluate - Rate
121. Drag and drop on Rate – Pass Assignment and select Below Rate Threshold
122. Click **Done**
123. Drag and drop Assignment from Logic anywhere
124. Set Label to “Risk Grade - Fail”
     1. API Name will set to Risk\_Grade\_Fail
125. Set Variables Values
     1. Variable 1
        1. Variable = AssignedPoints
        2. Operator = Add
        3. Value = 0
     2. Click Add Assignment
     3. Variable 2
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 0
     4. Click Add Assignment
     5. Variable 3
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     6. Click Add Assignment
     7. Variable 3
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
        2. Operator = Equals
        3. Value = loanInformation Record Variable and select LLC\_BI\_\_Risk\_Grade\_\_c field
     8. Click Add Assignment
     9. Variable 4
        1. Variable = RiskGrade\_ScorecardDetails Record Variable and select Name Field
        2. Operator = Equals
        3. Value = RiskGrade
126. Click **Done**
127. Click the white dot on Evaluate – Risk Grade
128. Drag and drop on Risk Grade – Fail Assignment
129. Drag and Drop Decision under Logic anywhere
130. Set Label to “Evaluate – Term Months”
     1. API Name will set to Evaluate\_Term\_Months
131. Under Outcome Order
132. Click [New Outcome]
133. Set Label to “Within Term Threshold”
     1. API Name will be set to Within\_Term\_Threshold
134. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Term\_Months\_\_c Field
135. In Operator field select Is Null
136. In Value field enter $GlobalConstant.False
137. Click Add Condition
138. In Resource field enter and select loanInformation Record Variable and select LLC\_BI\_\_Term\_Months\_\_c Field
139. In Operator field select Less Than or Equal
140. In Value field enter 12
141. Next, click on [Default Outcome] under Outcome Order section
142. Enter “Outside Term Threshold” in name field.
143. Click **Done**
144. Click the white dot on Risk Grade - Pass and drag and drop on new Evaluate – Term Months Decision
145. Click the white dot on Risk Grade - Fail and drag and drop on new Evaluate – Term Months Decision
146. Now, Drag and drop Assignment from Logic anywhere
147. Set Label to “Term Months - Pass”
     1. API Name will set to Term\_Months\_Pass
148. Set Variables Values
     1. Variable 1
        1. Variable = AssignedPoints
        2. Operator = Add
        3. Value = 1
     2. Click Add Assignment
     3. Variable 2
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     4. Click Add Assignment
     5. Variable 3
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     6. Click Add Assignment
     7. Variable 3
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
        2. Operator = Equals
        3. Value = loanInformation Record Variable and select LLC\_BI\_\_Term\_Month\_\_c field
     8. Click Add Assignment
     9. Variable 4
        1. Variable = Term\_ScorecardDetails Record Variable and select Name Field
        2. Operator = Equals
        3. Value = TermMonths
149. Click **Done**
150. Click the white dot on Evaluate – Term Months
151. Drag and drop on Term Month – Pass Assignment and select Below Rate Threshold
152. Click **Done**
153. Drag and drop Assignment from Logic anywhere
154. Set Label to “Term Months - Fail”
     1. API Name will set to Term Months\_Fail
155. Set Variables Values
     1. Variable 1
        1. Variable = AssignedPoints
        2. Operator = Add
        3. Value = 0
     2. Click Add Assignment
     3. Variable 2
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Assigned\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 0
     4. Click Add Assignment
     5. Variable 3
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Maximum\_Points\_\_c Field
        2. Operator = Equals
        3. Value = 1
     6. Click Add Assignment
     7. Variable 3
        1. Variable = Term\_ScorecardDetails Record Variable and select LLC\_BI\_\_Value\_\_c Field
        2. Operator = Equals
        3. Value = loanInformation Record Variable and select LLC\_BI\_\_Term\_Month\_\_c field
     8. Click Add Assignment
     9. Variable 4
        1. Variable = Term\_ScorecardDetails Record Variable and select Name Field
        2. Operator = Equals
        3. Value = TermMonths
156. Click **Done**
157. Click the white dot on Evaluate – Term Months
158. Drag and drop on Term Months – Fail Assignment
159. Drag and drop Assignment from Logic anywhere
160. Set Label to “Compile Scorecard Details”
     1. API Name will set to Compile\_Scorecard\_Details
161. Set Variables Values
     1. Variable 1
        1. Variable = Details
        2. Operator = Add
        3. Value = LoanAmount\_ScorecardDetails
     2. Click Add Assignment
     3. Variable 2
        1. Variable = Details
        2. Operator = Add
        3. Value = LTV\_ScorecardDetails
     4. Click Add Assignment
     5. Variable 3
        1. Variable = Details
        2. Operator = Add
        3. Value = Rate\_ScorecardDetails
     6. Click Add Assignment
     7. Variable 4
        1. Variable = Details
        2. Operator = Add
        3. Value = RiskGrade\_ScorecardDetails
     8. Click Add Assignment
     9. Variable 5
        1. Variable = Details
        2. Operator = Add
        3. Value = Term\_ScorecardDetails
162. Click **Done**
163. Click the white dot on Term Months - Pass and drag and drop on new Compile Scorecard Details
164. Click the white dot on Term Months - Fail and drag and drop on new Compile Scorecard Details
165. Click **Save**
166. Set Flow Label to “Commercial\_LoanAutoDecision”
     1. Flow API Name will set Commercial\_LoanAutoDecision
167. Set Type to Auolaunched Flow
168. Click **Save**
169. Click **Back**

### Add Commercial Subflow to Master Flow

1. Click Open next to TrainingLoanAutoDecision
2. Drag and drop Subflow under actions anywhere on the page
3. Enter in Search Flow “Commercial\_LoanAutoDecision”
4. Click on the Flow that shows up called Commercial\_LoanAutoDecision
5. Set Label to “Commercial Sub Flow”
   1. API Name will set to Commercial\_Sub\_Flow
6. Set Input Values
   1. Toggle accountInformation to On
      1. Select accountInformation Record Variable
   2. Toggle CreditRequest to On
      1. Select creditRequest Record Variable
   3. Toggle loanInformation to On
      1. Select loanInformation Record Variable
   4. Toggle Description\_Approved to On
      1. Select Description\_Approved under Variables
   5. Toggle Description\_Decline to On
      1. Select Description\_Decline under Variables
   6. Toggle Description\_Mannual\_Review\_Required to On
      1. Select Description\_Mannual\_Review\_Required under Variables
   7. Toggle Description\_Recommend\_Approval to On
      1. Select Description\_Recommend\_Approval under Variables
   8. Toggle Description\_Recommend\_Decline to On
      1. Select Description\_Recommend\_Decline under Variables
   9. Toggle ResultAutoApprove to On
      1. Select ResultAutoApprove under Variables
   10. Toggle ResultAutoDecline to On
       1. Select ResultAutoDecline under Variables
   11. Toggle ResultInformationRequired to On
       1. Select ResultInformationRequired under Variables
   12. Toggle ResultInformationRequested to On
       1. Select ResultInformationRequested under Variables
   13. Toggle ResultManualReviewRequired to On
       1. Select ResultManualReviewRequired under Variables
   14. Toggle ResultRecommendApproval to On
       1. Select ResultRecommendApproval under Variables
   15. Toggle ResultRecommendDecline to On
       1. Select ResultRecommendDecline under Variables
7. Store Output Values
   1. AssignedPoints
      1. Select AssignedPoints under Variables
   2. Details
      1. Select Details under Variables
   3. MaximumPoints
      1. Select MaximumPoints under Variables
   4. Result
      1. Select Result under Variables
   5. ResultDescription
      1. Select ResultDescription under Variables
8. Click **Done**
9. Click the white dot on Which Product Line
10. Drag and drop onto Commercial Sub Flow and select Commercial
11. Click **Done**
12. Click **Save**

## No Product Line Support

1. Drag and drop Assignment from Logic anywhere
2. Set Label to “Product Line Not Supported”
   1. API Name will set to Product\_Line\_Not\_Supported
3. Set Variables Values
   1. Variable 1
      1. Variable = Result
      2. Operator = Equals
      3. Value = ResultError from Constants
   2. Click Add Assignment
   3. Variable 2
      1. Variable = ResultDescription
      2. Operator = Equals
      3. Value = ProductLineUnsupported from Constants
4. Click **Done**
5. Click the white dot on Which Product Line
6. Drag and drop onto Product Line Not Supported
7. Click **Save**