

LAYOUTS

A Layout is a selection and ordering of fields that are to be viewed.

For example, if you have defined 100 custom fields for Loan objects, you obviously don't want to display all 100 custom fields every time your user views the Loan Flow page.

Instead, you define a Layout, which consists of a subset of those 100 custom fields listed in an order of your choosing.

For example, using Layout A, you might decide to show one set of custom fields in a certain order for FHA Conventional loans. Then using Layout B, you can show a different set of custom fields in a different order for VA loans.

Business Rules can automatically select different Layouts depending on the data within a loan flow. For example, if a custom data field called LoanTerms is equal to "FHA Conventional", a Business Rule can automatically set the layout to Layout A. If LoanTerms equals "VA", a different Business Rule can set the layout to Layout B.

Layouts can be assigned per Loan and per type of user (Borrower or Lender).

For example, Loan "Johnson Purchase" can show Layout "Borrower" for Borrowers but Layout "VA" for Lenders.