**Request Type selection**

The first configuration in your new YouConnect site will be your Request/Order Types that are currently being submitted by your Loan Officer for both the Appraisal and Environmental departments (where applicable). With each Request Type you supply us, you will designate it as a 1 Step or 2 Step workflow sequence. The workflow sequence selected will determine the process and automated emails for each Request Type.

**2 Step process requires sending to vendors.** This will enable two primary workflow sequences within the Request.

* An external vendor will be solicited and engaged to complete and upload a report.
* The completed report is then assigned for review, either to an external or internal reviewer.
* You will have the option to select No Review Needed when necessary.

Examples:

Commercial Appraisal

Residential Appraisal

Commercial Evaluation that is going to an external vendor

Residential Evaluation that is going to an external vendor

External Inspection

Environmental Phase I

**1 Step process doesn’t require sending to vendors.** This will enable the “Review” only workflow sequence.

* Essentially, it is only the second half of a 2 Step process. Picks up in the second half of an order.
* Doesn’t go to an initial vendor to have a report created but it can be sent for review to an internal or external reviewer.

Examples:

Review of a 3rd Party Report

Review Only

In-House Order of any kind