

Loan Audit System

REDESIGNED

Audit Allocation Platform

A smarter way to assign, track, and simulate loan order distribution across auditor roles.

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The Problem



No role visibility

Auditors from Credit and Compliance, were listed together with no distinction.



Manual tracking

No clear view of who holds which loan orders or how many each auditor currently has.



No audit trail

It was impossible to filter by auditor to see their current loan possession at a glance.



No simulation support

Teams couldn't test distribution scenarios before committing to a real allocation.

The Solution

A redesigned allocation UI with two core improvements:

Role-grouped sidebar

Auditors split into Credit, Compliance

Each group collapsible with live order counts

Color-coded per role for instant recognition

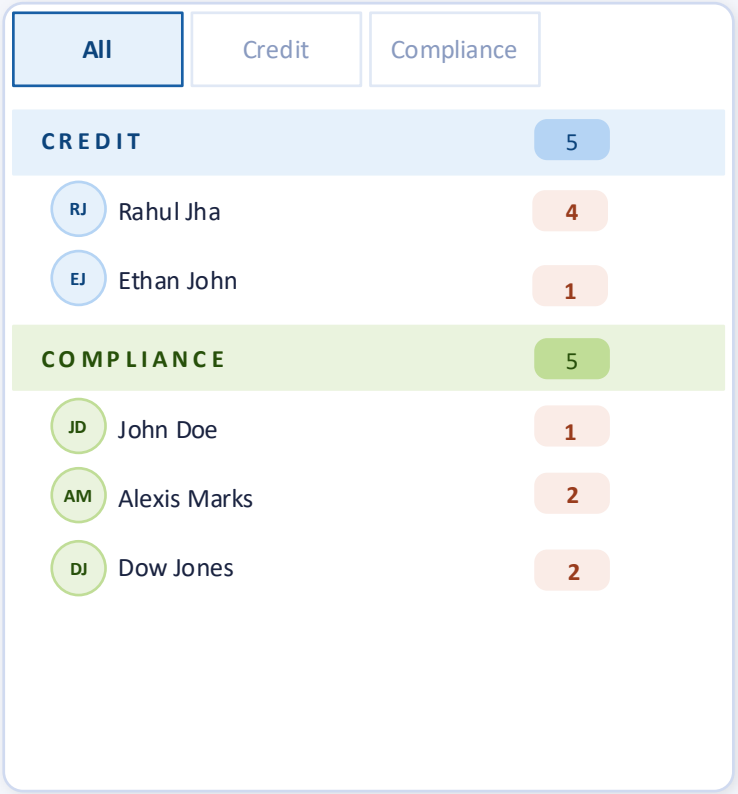
Two-tab main panel

Loan Orders tab: full unassigned queue with search & filter

Allocated tab: per-auditor view with status badges

Stats bar shows totals, selected count, loan types

Feature 1 — Role-Grouped Sidebar



Three role groups

Credit IQA, Complaint IQA, and Complaints are each given their own collapsible section.

Live order counts

Each auditor shows a badge with the number of loans currently in their possession.

Role filter tabs

Filter the entire sidebar to a single role — see only Credit or compliance auditors.

Feature 2 — Two-Tab Main Panel

Loan Orders

70	12	52	18
Total	Selected	Conv.	FHA/VA

#	Order No	Borrower	Type	Owner
	Test113479	ksg] sdtyg	Conv.	John Doe
	Test114454	p[kh] dstgh	Conv.	—
	Test119128	lkdb dstry	Conv.	Alexis Marks
	Test120411	poiusg djyj	FHA	Dow Jones.
	Test122644	jklmn opqrs	VA	—

Allocated

Viewing: John Doe • 4 orders

Order No	Type	Status
Test108221	Conv.	Assigned
Test109334	FHA	Assigned
Test110445	Conv.	In review
Test111556	VA	In review

What we built:

- Role-grouped auditor sidebar with collapsible sections
- Two-tab panel — Loan Orders & Allocated view
- Live order counts per auditor with color-coded roles
- Search, filter, bulk select & allocate

Questions?



Ready to present