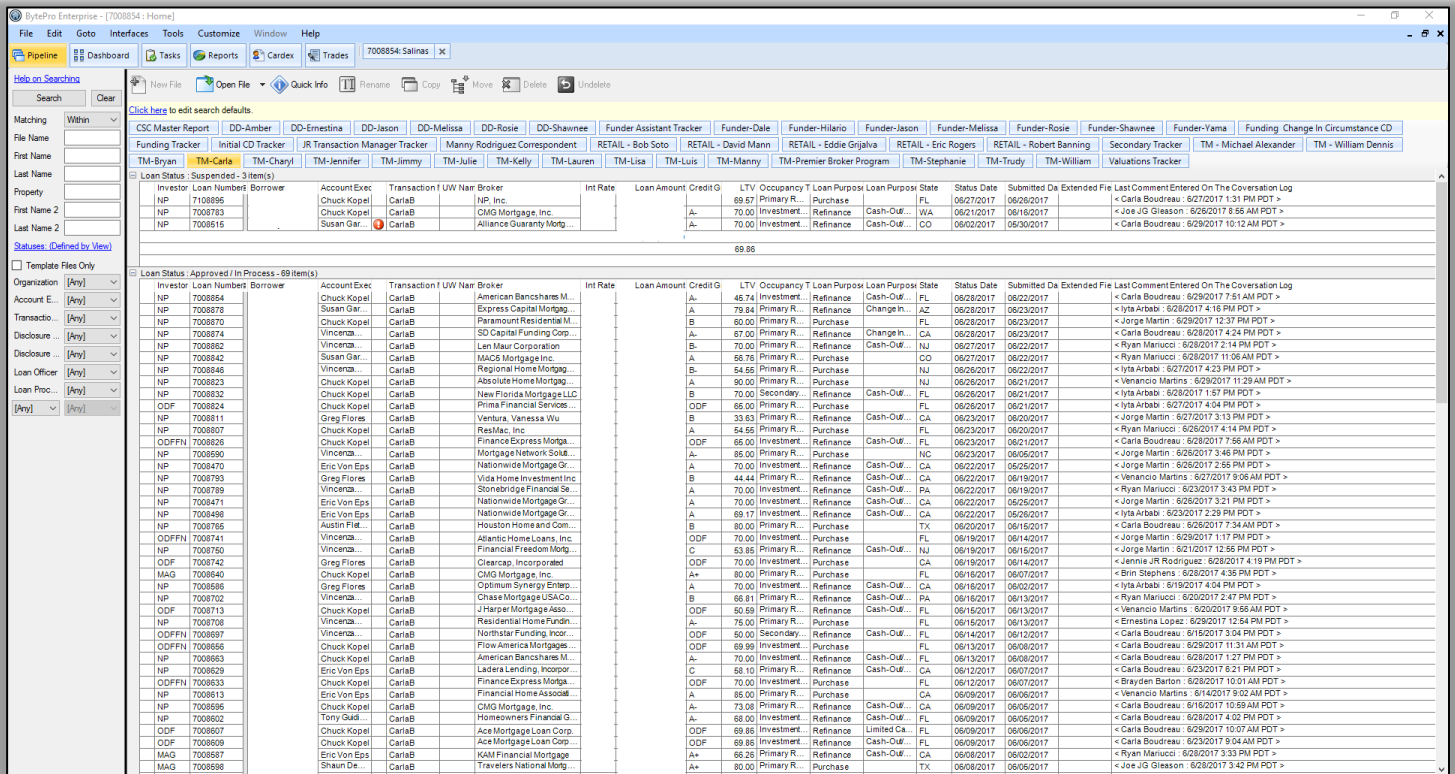


BytePro Guide

Overview

Pipeline View

Once logged in, the landing page will be the main **Pipeline View**. Detailed information on each file is displayed in the columns to the right, grouped by status.



The screenshot shows the BytePro Enterprise software interface. The top menu bar includes File, Edit, Goto, Interfaces, Tools, Customize, Window, and Help. Below the menu is a toolbar with icons for New File, Open File, Quick Info, Rename, Copy, Move, Delete, and Update. The left sidebar contains a search bar and various filter options like Matching, File Name, First Name, Last Name, Property, First Name 2, Last Name 2, and Statuses. The main table displays loan data with columns for Investor, Loan Number, Borrower, Account Exec, Transaction / UW Name, Broker, Int Rate, Loan Amount, Credit G, LTV, Occupancy, Loan Purpose, Loan Purpose State, Status Date, Submitted Date, Extended File, Last Comment, Entered On, The Conversation Log, and Valuations Tracker. The table is grouped by status, with sections for 'Loan Status: Suspended - 3 item(s)' and 'Loan Status: Approved / In Process - 89 item(s)'.

[Help on Searching](#)

Search Clear

Matching Within

File Name

First Name

Last Name

Property

First Name 2

Last Name 2

[Statuses: \(Defined by View\)](#)

☐ Template Files Only

Organization [Any]

Account E... [Any]

Transactio... [Any]

Disclosure... [Any]

Disclosure... [Any]

Loan Officer [Any]

Loan Proc... [Any]

[Any]

Search Fields

Search files by name or loan number, or by specific people assigned to them.

- Change *Matching* to “Within” for faster search results. Files can now be searched by last four digits of the loan number.
- Files can also be searched by specific people assigned to them. For example, by Transaction Manager, Account Executive or Loan Officer.
- The “Quick Search” buttons at the top of the screen can also be used:

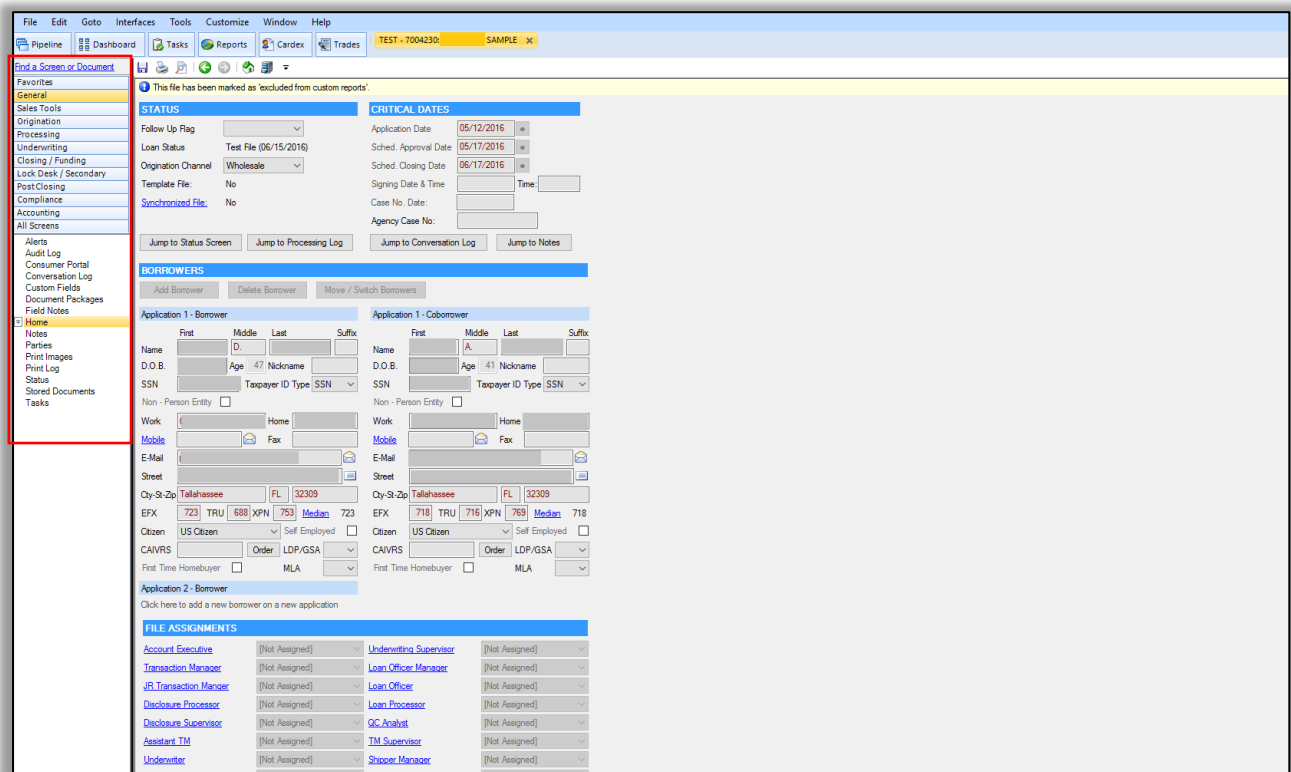


Working within Files

Home Screen Within a File

Once inside the selected file, general information is displayed such as **borrower information**, **file assignments** and **status**.

The **left side** of the screen is the navigation pane to move through the different information screens.



File **Edit** **Goto** **Interfaces** **Tools** **Customize** **Window** **Help**

TEST-7004230 **SAMPLE**

Find a Screen or Document

General

STATUS

Follow Up Rag: [Dropdown]
 Loan Status: Test File (06/15/2016)
 Origination Channel: Wholesale
 Template File: No
 Synchronized File: No

CRITICAL DATES

Application Date: 05/12/2016
 Sched. Approval Date: 05/17/2016
 Sched. Closing Date: 06/17/2016
 Signing Date & Time: [Time]
 Case No. Date: [Date]
 Agency Case No: [Text]

Jump to Status Screen Jump to Processing Log Jump to Conversation Log Jump to Notes

BORROWERS

Add Borrower Delete Borrower Move / Switch Borrowers

Application 1 - Borrower

Name: First [D] Middle [] Last [] Suffix []
 D.O.B. [] Age: 47 Nickname []
 SSN [] Taxpayer ID Type [SSN] Taxpayer ID [SSN]
 Non - Person Entity []
 Work: [] Home: []
 Mobile: [] Fax: []
 E-Mail: []
 Street: []
 City-St-Zip: Tallahassee FL 32309
 EFX: 723 TRU 688 XPH 753 Median 723
 Citizen: US Citizen [] Self Employed []
 CAIVRS: [] Order LDP/GSA []
 First Time Homebuyer [] MLA []

Application 1 - Coborrower

Name: First [A] Middle [] Last [] Suffix []
 D.O.B. [] Age: 41 Nickname []
 SSN [] Taxpayer ID Type [SSN] Taxpayer ID [SSN]
 Non - Person Entity []
 Work: [] Home: []
 Mobile: [] Fax: []
 E-Mail: []
 Street: []
 City-St-Zip: Tallahassee FL 32309
 EFX: 718 TRU 716 XPH 769 Median 718
 Citizen: US Citizen [] Self Employed []
 CAIVRS: [] Order LDP/GSA []
 First Time Homebuyer [] MLA []

Application 2 - Borrower

Click here to add a new borrower on a new application

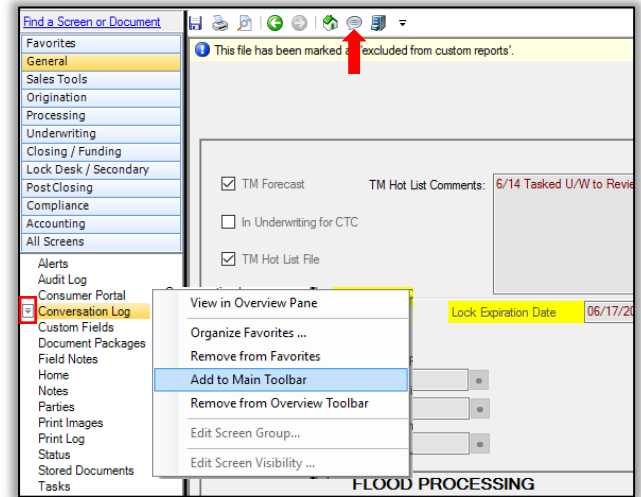
FILE ASSIGNMENTS

Account Executive	[Not Assigned]	Underwriting Supervisor	[Not Assigned]
Transaction Manager	[Not Assigned]	Loan Officer Manager	[Not Assigned]
JB Transaction Manager	[Not Assigned]	Loan Officer	[Not Assigned]
Disclosure Processor	[Not Assigned]	Loan Processor	[Not Assigned]
Disclosure Supervisor	[Not Assigned]	QC Analyst	[Not Assigned]
Assistant TM	[Not Assigned]	TM Supervisor	[Not Assigned]
Underwriter	[Not Assigned]	Shopper Manager	[Not Assigned]

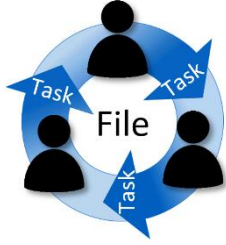
Adding Shortcuts

For frequently used screen, you can add a **shortcut** to the **toolbar** for quick access.

1. Select the screen you want to add to your toolbar.
2. Click the arrow to the left of the screen selection.
3. Select “Add to Main Toolbar” from the pop up menu.
4. A custom shortcut icon will be added to the toolbar.



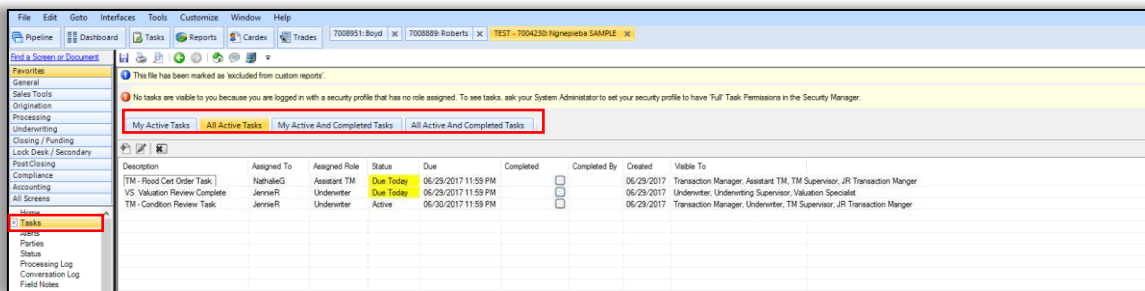
Tasks



Tasks are assigned based on roles and file process. It is how the file is passed between departments in the file flow. For example, after conditions are uploaded to DocVelocity by a Transaction Manager (TM), a Condition Review needs to be requested. To submit this request, the TM will create a “TM Condition Review” task in Bytepro which will be assigned to the Underwriter. The Underwriter will see the task assigned to them and complete the review as needed.

Task View From Within a Specific File

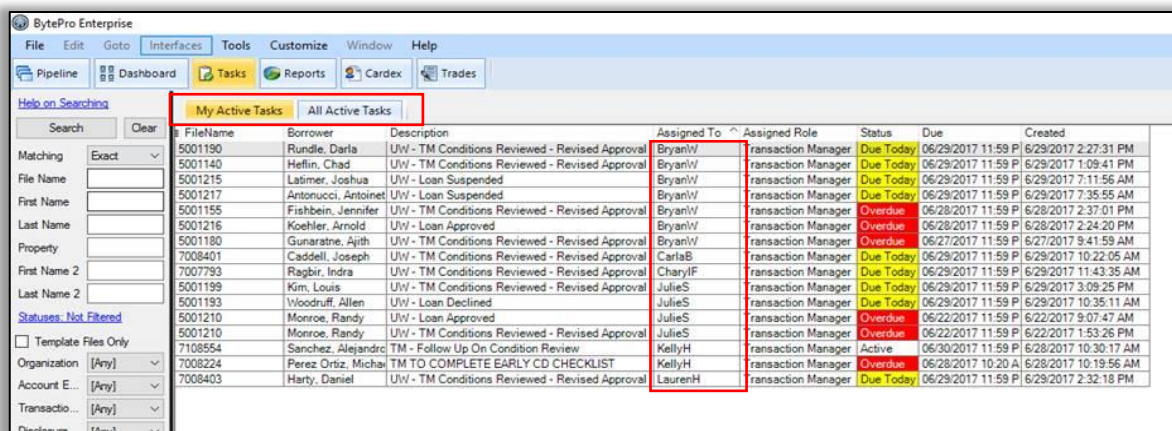
To view tasks assigned to a specific file, select “Tasks” from the screen selections. Then, select the **task tabs** top see **all active tasks** or all tasks assigned to you.



All Tasks as Assigned to Specific Transaction Mangers

All tasks can be viewed as only assigned to you or to everyone in your role.

1. Select the **Tasks** tab at the top of the screen.
2. Select either **My Active Tasks** to see what is assigned to you only or **All Active Tasks** to see the ones assigned to all Transaction Managers.

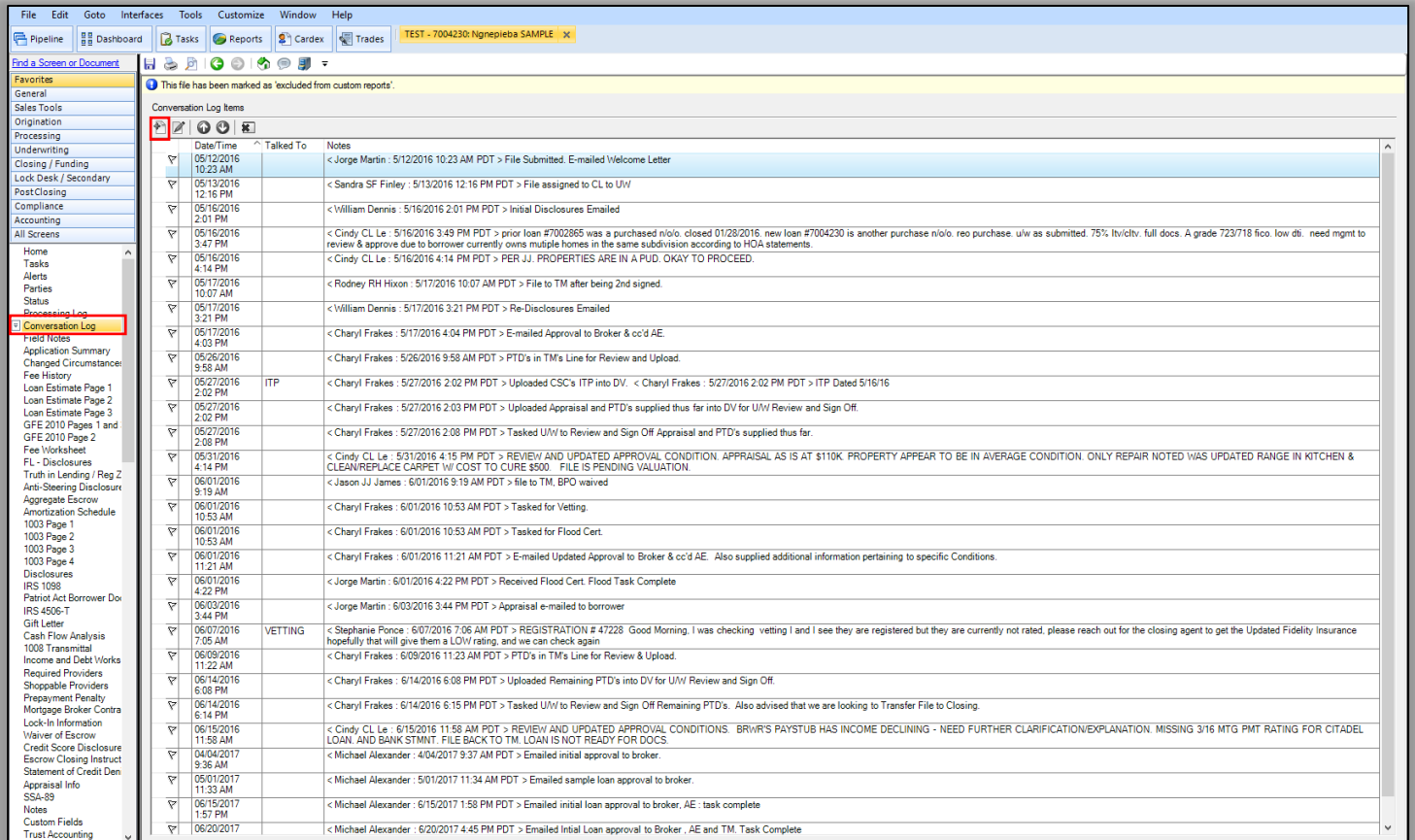


Conversation Log

Conversation logs are used to track file flow and show the process for each action. **After assigning a new a task or conducting *any* communication**, the conversation log must be updated.

To add a new entry to the Conversation Log:

1. Select **Conversation Log** from the screen selection log. This will display the entire transaction log.
2. Select the **New Item** icon
3. Create your entry. Bytepro will add your username and time stamp to the entry automatically.



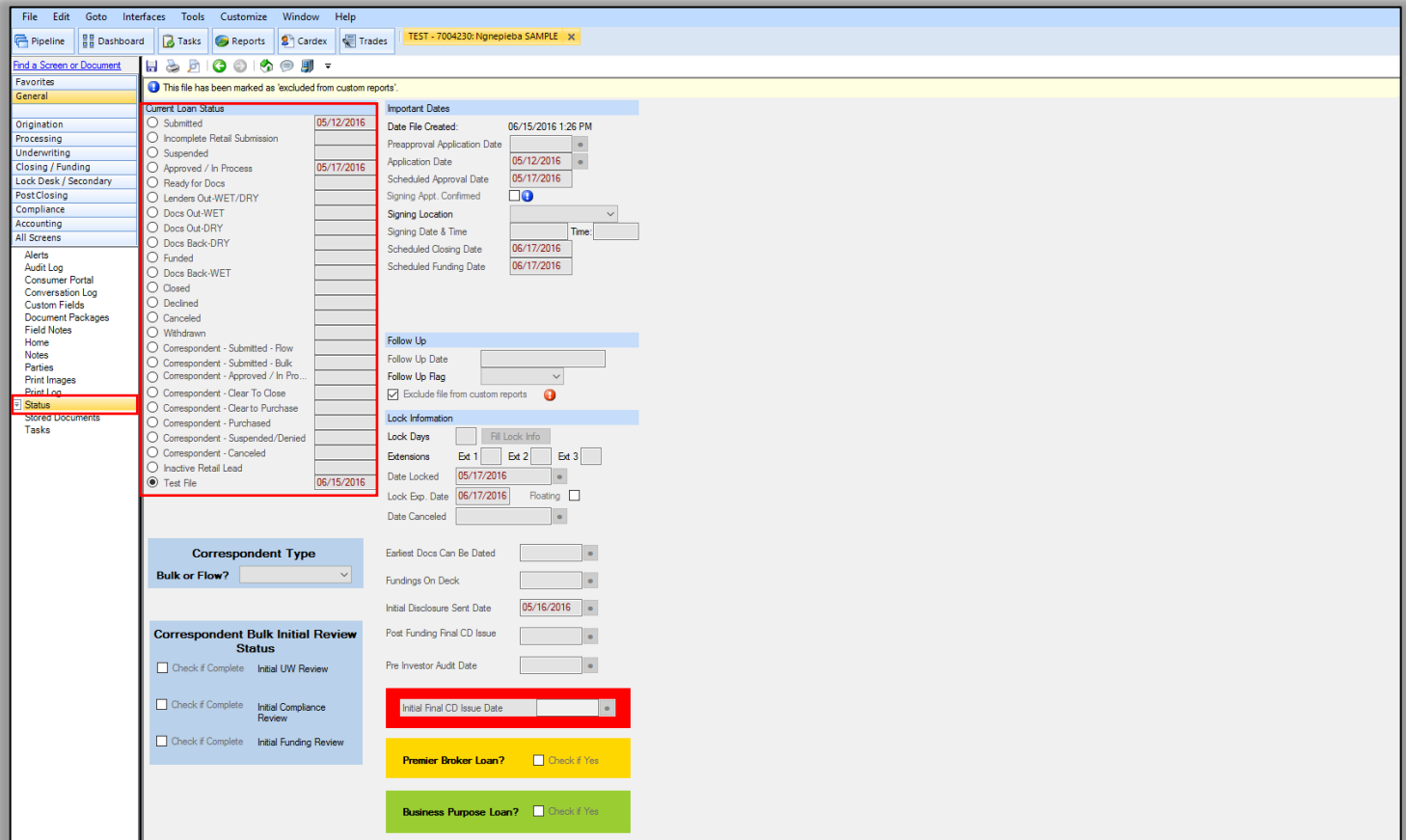
The screenshot shows the Citadel Servicing Corporation software interface. The left sidebar contains a list of screens, with 'Conversation Log' highlighted. The main window displays a table of conversation entries. The table has three columns: 'Date/Time', 'Talked To', and 'Notes'. The entries are listed chronologically from top to bottom.

Date/Time	Talked To	Notes
05/12/2016 10:23 AM		< Jorge Martin : 5/12/2016 10:23 AM PDT > File Submitted. E-mailed Welcome Letter
05/13/2016 12:16 PM		< Sandra SF Finley : 5/13/2016 12:16 PM PDT > File assigned to CL to UW
05/16/2016 2:01 PM		< William Dennis : 5/16/2016 2:01 PM PDT > Initial Disclosures Emailed
05/16/2016 3:47 PM		< Cindy CL Le : 5/16/2016 3:49 PM PDT > prior loan #7002865 was a purchased n/o. closed 01/28/2016. new loan #7004230 is another purchase n/o. reo purchase. u/w as submitted. 75% ltv/cdv. full docs. A grade 723/718 fico. low dti. need mgmt to review & approve due to borrower currently owns multiple homes in the same subdivision according to HOA statements.
05/16/2016 4:14 PM		< Cindy CL Le : 5/16/2016 4:14 PM PDT > PER JJ. PROPERTIES ARE IN A PUD. OKAY TO PROCEED.
05/17/2016 10:07 AM		< Rodney RH Hixon : 5/17/2016 10:07 AM PDT > File to TM after being 2nd signed.
05/17/2016 3:21 PM		< William Dennis : 5/17/2016 3:21 PM PDT > Re-Disclosures Emailed
05/17/2016 4:04 PM		< Charyl Frakes : 5/17/2016 4:04 PM PDT > E-mailed Approval to Broker & cc'd AE.
05/26/2016 9:58 AM		< Charyl Frakes : 5/26/2016 9:58 AM PDT > PTD's in TM's Line for Review and Upload.
05/27/2016 2:02 PM	ITP	< Charyl Frakes : 5/27/2016 2:02 PM PDT > Uploaded CSC's ITP into DV. < Charyl Frakes : 5/27/2016 2:02 PM PDT > ITP Dated 5/16/16
05/27/2016 2:02 PM		< Charyl Frakes : 5/27/2016 2:03 PM PDT > Uploaded Appraisal and PTD's supplied thus far into DV for UW/ Review and Sign Off.
05/27/2016 2:08 PM		< Charyl Frakes : 5/27/2016 2:08 PM PDT > Tasked UW/ to Review and Sign Off Appraisal and PTD's supplied thus far.
05/31/2016 4:14 PM		< Cindy CL Le : 5/31/2016 4:15 PM PDT > REVIEW AND UPDATED APPROVAL CONDITION. APPRAISAL AS IS AT \$110K. PROPERTY APPEAR TO BE IN AVERAGE CONDITION. ONLY REPAIR NOTED WAS UPDATED RANGE IN KITCHEN & CLEAN/REPLACE CARPET W/ COST TO CURE \$500. FILE IS PENDING VALUATION.
06/01/2016 9:19 AM		< Jason JJ James : 6/01/2016 9:19 AM PDT > file to TM. BPO waived
06/01/2016 10:53 AM		< Charyl Frakes : 6/01/2016 10:53 AM PDT > Tasked for Vetting.
06/01/2016 10:53 AM		< Charyl Frakes : 6/01/2016 10:53 AM PDT > Tasked for Flood Cert.
06/01/2016 11:21 AM		< Charyl Frakes : 6/01/2016 11:21 AM PDT > E-mailed Updated Approval to Broker & cc'd AE. Also supplied additional information pertaining to specific Conditions.
06/01/2016 4:22 PM		< Jorge Martin : 6/01/2016 4:22 PM PDT > Received Flood Cert. Flood Task Complete
06/03/2016 3:44 PM		< Jorge Martin : 6/03/2016 3:44 PM PDT > Appraisal e-mailed to borrower
06/07/2016 7:05 AM	VETTING	< Stephanie Ponce : 6/07/2016 7:05 AM PDT > REGISTRATION # 47228 Good Morning. I was checking vetting I and I see they are registered but they are currently not rated. please reach out for the closing agent to get the Updated Fidelity Insurance hopefully that will give them a LOW rating, and we can check again
06/09/2016 11:23 AM		< Charyl Frakes : 6/09/2016 11:23 AM PDT > PTD's in TM's Line for Review & Upload.
06/14/2016 6:08 PM		< Charyl Frakes : 6/14/2016 6:08 PM PDT > Uploaded Remaining PTD's into DV for UW/ Review and Sign Off.
06/14/2016 6:14 PM		< Charyl Frakes : 6/14/2016 6:15 PM PDT > Tasked UW/ to Review and Sign Off Remaining PTD's. Also advised that we are looking to Transfer File to Closing.
06/15/2016 11:58 AM		< Cindy CL Le : 6/15/2016 11:58 AM PDT > REVIEW AND UPDATED APPROVAL CONDITIONS. BRWR'S PAYSTUB HAS INCOME DECLINING - NEED FURTHER CLARIFICATION/EXPLANATION. MISSING 3/16 MTG PMT RATING FOR CITADEL LOAN. AND BANK STMT. FILE BACK TO TM. LOAN IS NOT READY FOR DOCS.
04/04/2017 9:36 AM		< Michael Alexander : 4/04/2017 9:37 AM PDT > Emailed initial approval to broker.
05/01/2017 11:34 AM		< Michael Alexander : 5/01/2017 11:34 AM PDT > Emailed sample loan approval to broker.
06/15/2017 1:57 PM		< Michael Alexander : 6/15/2017 1:58 PM PDT > Emailed initial loan approval to broker, AE, task complete
06/20/2017		< Michael Alexander : 6/20/2017 4:45 PM PDT > Emailed Initial Loan approval to Broker, AE and TM. Task Complete

Status Screen

This screen reflects all important dates for the loan status during the file process.

Please Note: *If a date is added incorrectly or in the wrong field, you must notify your manager immediately. Tasks are generated based on the entries on the status screen.*



The screenshot displays the Citadel Status Screen for file 7004230: Nignepleba SAMPLE. The interface includes a menu bar (File, Edit, Goto, Interfaces, Tools, Customize, Window, Help) and a sidebar with options like Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. The main content area is divided into several sections:

- Current Loan Status:** A list of radio buttons for loan stages (Submitted, Incomplete Retail Submission, Suspended, Approved / In Process, Ready for Docs, Lenders Out-WET/DRY, Docs Out-WET, Docs Out-DRY, Docs Back-DRY, Funded, Docs Back-WET, Closed, Declined, Canceled, Withdrawn, Correspondent - Submitted - Flow, Correspondent - Submitted - Bulk, Correspondent - Approved / In Process, Correspondent - Clear To Close, Correspondent - Clear To Purchase, Correspondent - Purchased, Correspondent - Suspended/Denied, Correspondent - Canceled, Inactive Retail Lead, Test File). The 'Test File' option is selected.
- Important Dates:** Fields for Date File Created (06/15/2016 1:26 PM), Preapproval Application Date, Application Date (05/12/2016), Scheduled Approval Date (05/17/2016), Signing Appt. Confirmed, Signing Location, Signing Date & Time, Scheduled Closing Date (06/17/2016), and Scheduled Funding Date (06/17/2016).
- Follow Up:** Fields for Follow Up Date, Follow Up Flag, and a checkbox for 'Exclude file from custom reports'.
- Lock Information:** Fields for Lock Days, Extensions (Ext 1, Ext 2, Ext 3), Date Locked (05/17/2016), Lock Exp. Date (06/17/2016), Floating checkbox, and Date Canceled.
- Correspondent Type:** A dropdown menu for 'Bulk or Flow?'.
- Correspondent Bulk Initial Review Status:** Checkboxes for 'Check if Complete' and 'Initial UW Review', 'Initial Compliance Review', and 'Initial Funding Review'.
- Premier Broker Loan?** A checkbox labeled 'Check if Yes'.
- Business Purpose Loan?** A checkbox labeled 'Check if Yes'.

Other Important Notes:

- Only one user can be inside a file at once.
- Avoid unnecessary changes to files as it can generate tasks that aren't visible to you.
- Your task screen does not refresh automatically. New tasks will only appear after exiting and returning to the task screen.