

# **X** User Guide—Uploading Files to Citadel Servicing

To be able to upload files to Citadel Servicing Corporation loan files, you will be sent an email invitation from Box, granting access to upload documents to the loan file.

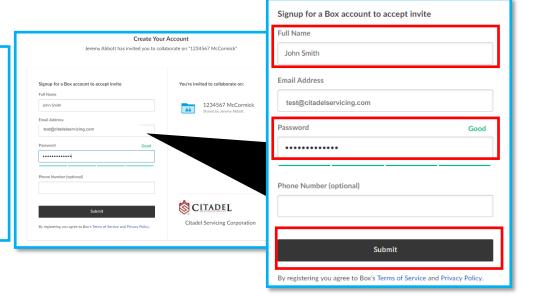
# 1. Accept the Invitation.

Open the email invitation from noreply@box.com and select the Accept Invite button. This will take you to the Box website.



# 2. Create a Box Account.

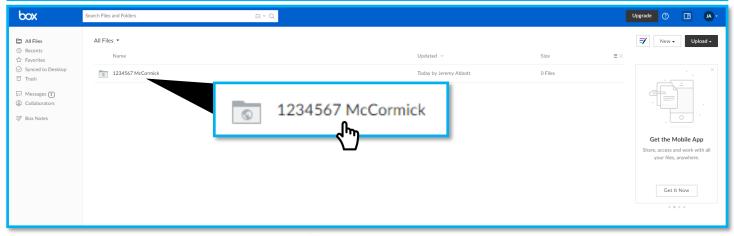
On the Box website, enter your **full name**, then create a **password** for your Box account and enter a phone number (optional)



# 3. Open the Loan File.

After account creation, you will be logged into Box. You will be able to see any loan files(s) that are available to upload documents into.

<u>Important:</u> Your CSC transaction manager will not be able to retrieve files uploaded anywhere other than the loan file. Be sure to select the appropriate folder before uploading any files to Box.







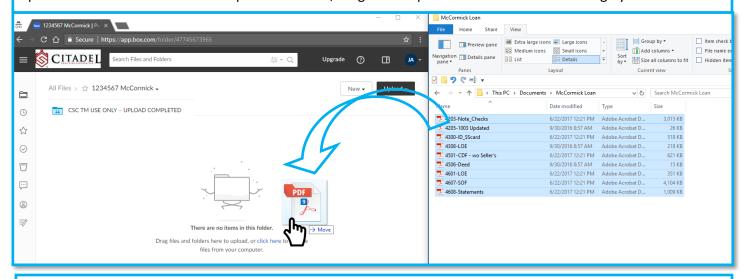
### 4. Upload Files.

Once inside the loan file, you can easily upload files to box using the drag and drop feature or using the upload button, shown below.

#### Upload from the File Browser. Click the **Upload** button on the top right of the screen, then select the files from your PC. C ↑ Secure | https://citadelservicing.app.box.com/folder/4774567396 S CITADEL Search Files and Folders All Files > Training Folders > 1234567 McCormick -Upload W -Name v ☆ Favorites CSC TM USE ONLY - UPLOAD COMPLETED Mar 27, 2018 by Messages Files Collaborators Coll Folder Notice: Do not upload files to the folder nor marked Share this Folder • "CSC TM USE ONLY – UPLOAD COMPLETED"

## **Drag and Drop.**

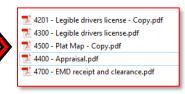
Open the file folder location in a separate window, drag and drop the contents into Box through your browser.



# Please follow these instructions to avoid delays with condition review:

- 1. Please label each condition with the number noted on the Condition Loan Approval.
- 2. Save each condition, individually, as a PDF document, do not piece mail your conditions

CONDITIONS WILL NOT BE REVIEWED IF PDF'S ARE NOT LABELED WITH THE SPECIFIC CONDITION # FROM THE LOAN APPROVAL



Box logins and passwords are not managed by CSC. Please use the 'Forgot Password' link on the Box website.

