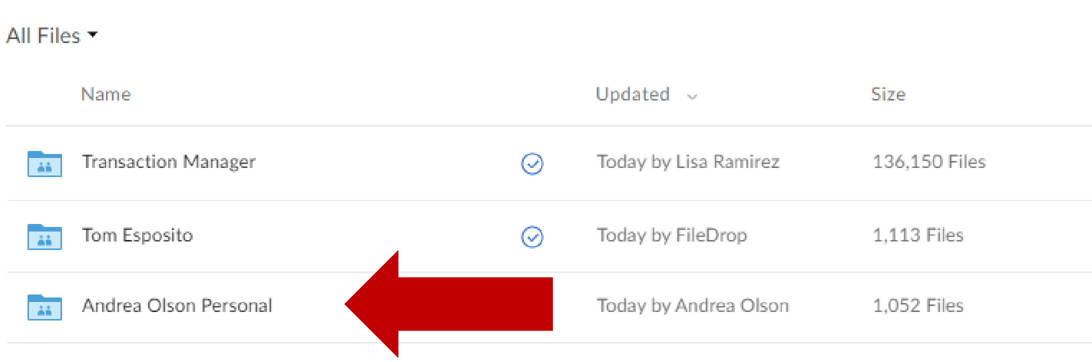
Uploading Conditions from Box to Doc Velocity

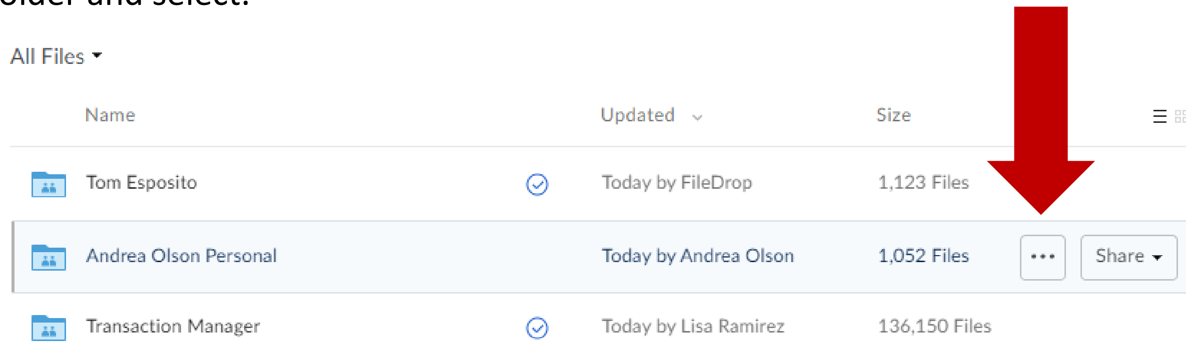
Updated 01/11/2019

Box notification will be received via email once the Broker has uploaded conditions.

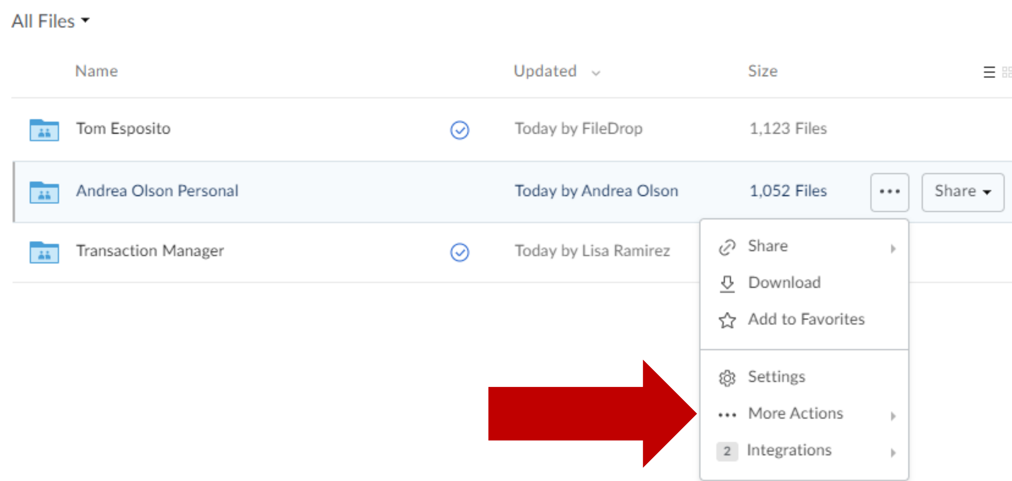
Log into Box and locate PERSONAL folder



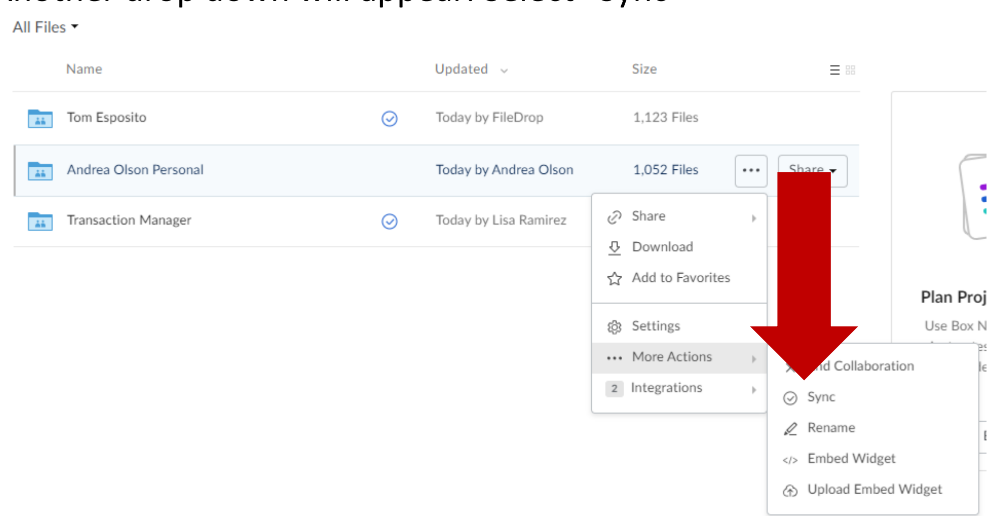
Run the mouse over PERSONAL folder to show "…" on the right hand side of the folder and select.



When "…" is selected a drop down will appear. Select "More Actions".

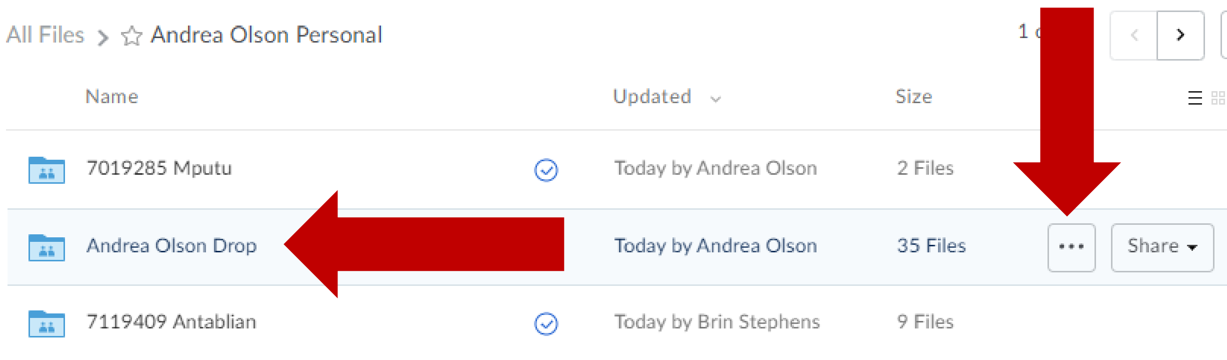


Another drop down will appear. Select "Sync"

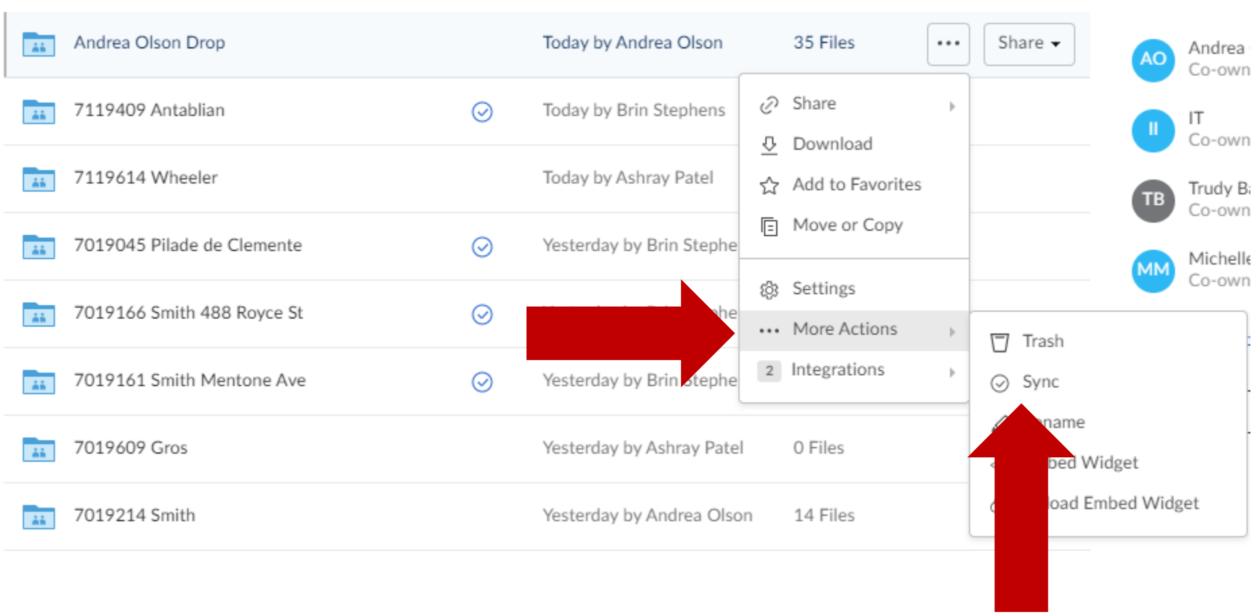


Once PERSONAL folder is SYNCED select PERSONAL folder to access all files & DROP folder. Locate DROP folder and follow the same steps as above to SYNC the DROP folder to desktop.

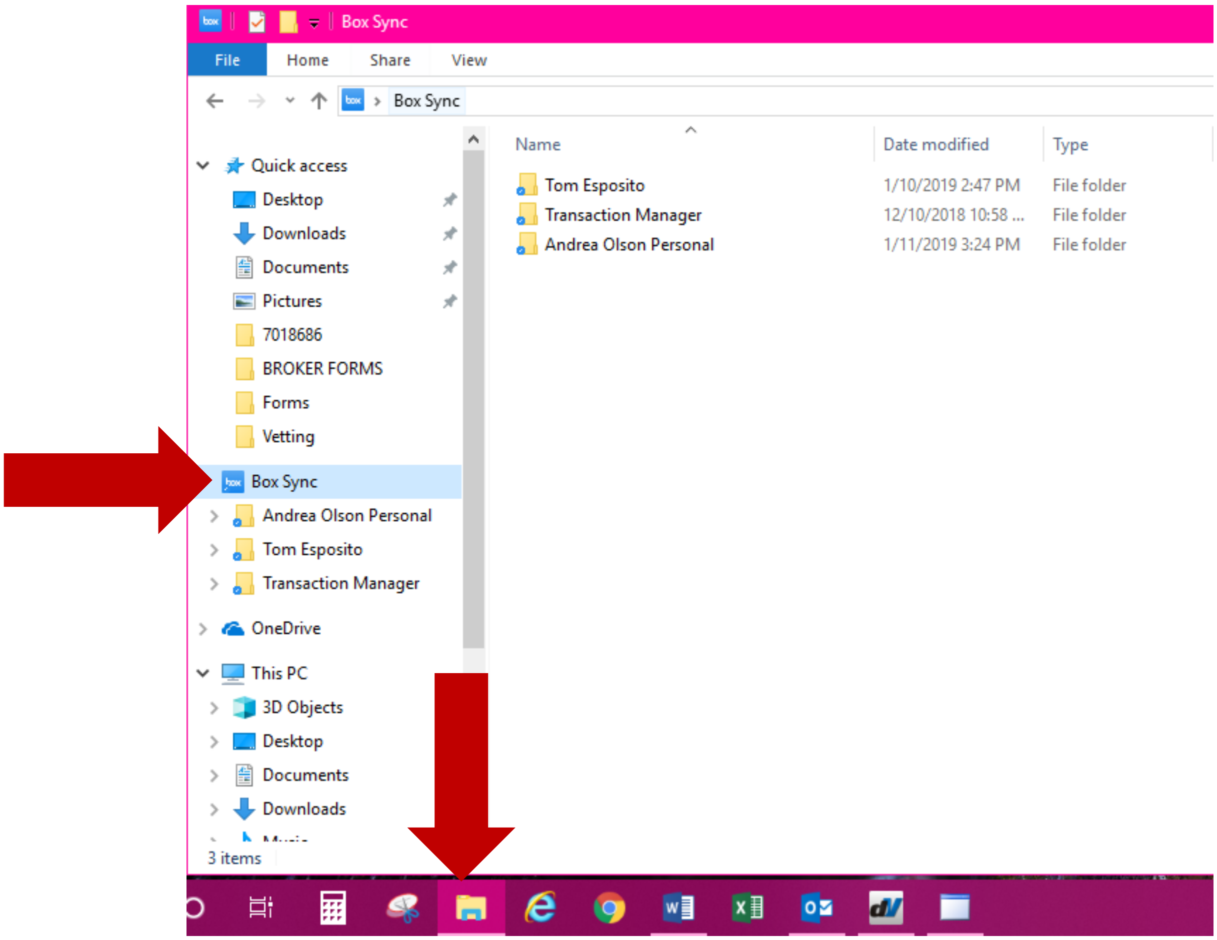
Run the mouse over the folder to show "…" on the right hand side of the folder. Select "…"



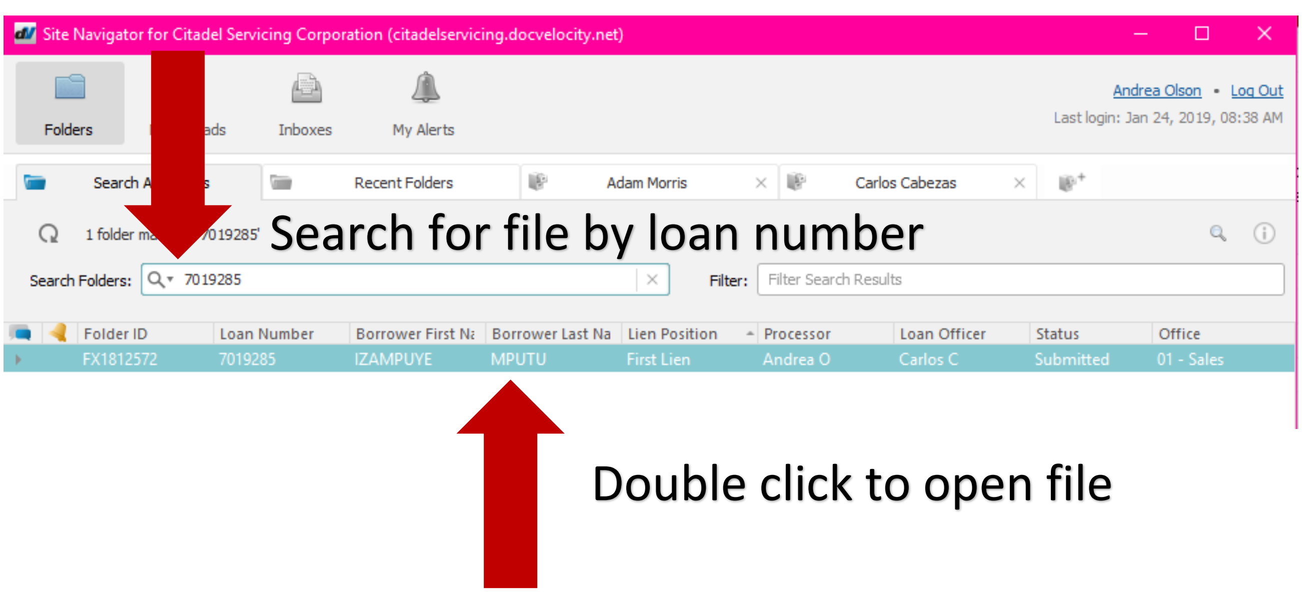
When "…" is selected a drop down will appear. Select "More Actions". Another Drop down will appear, select "Sync".



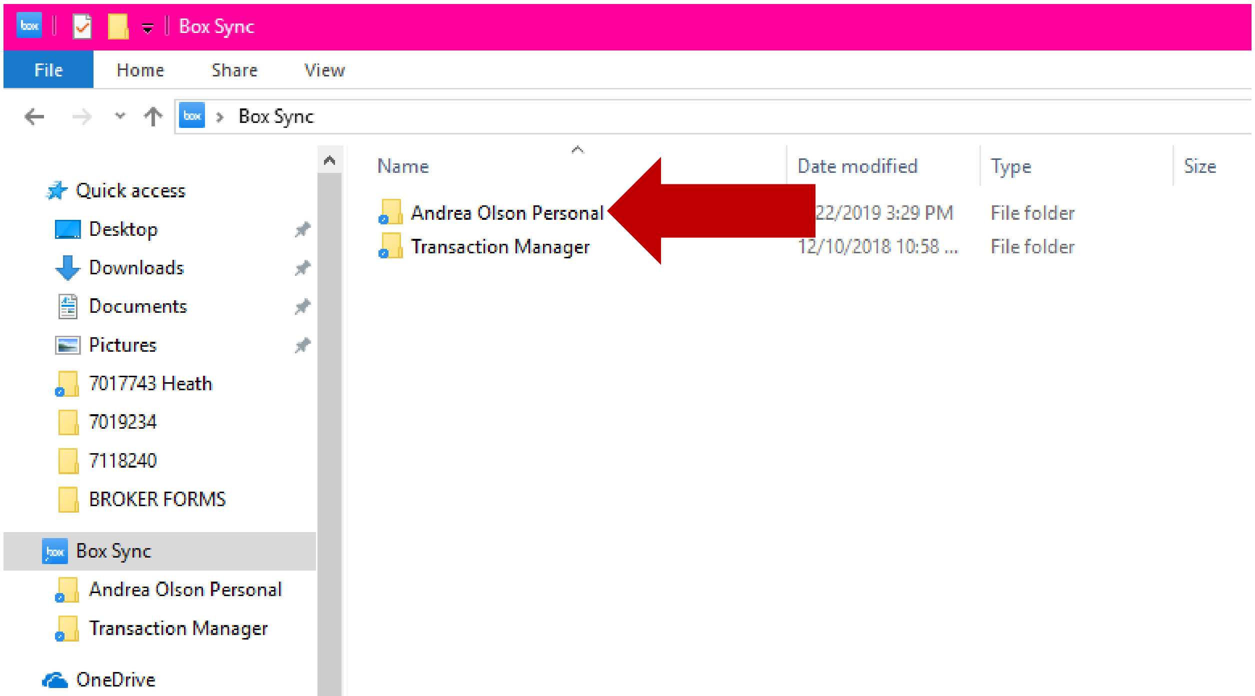
PERSONAL & DROP folder are now SYNCED to desktop. All conditions uploaded to BOX are now accessible from the “File Explorer” folder on desktop.



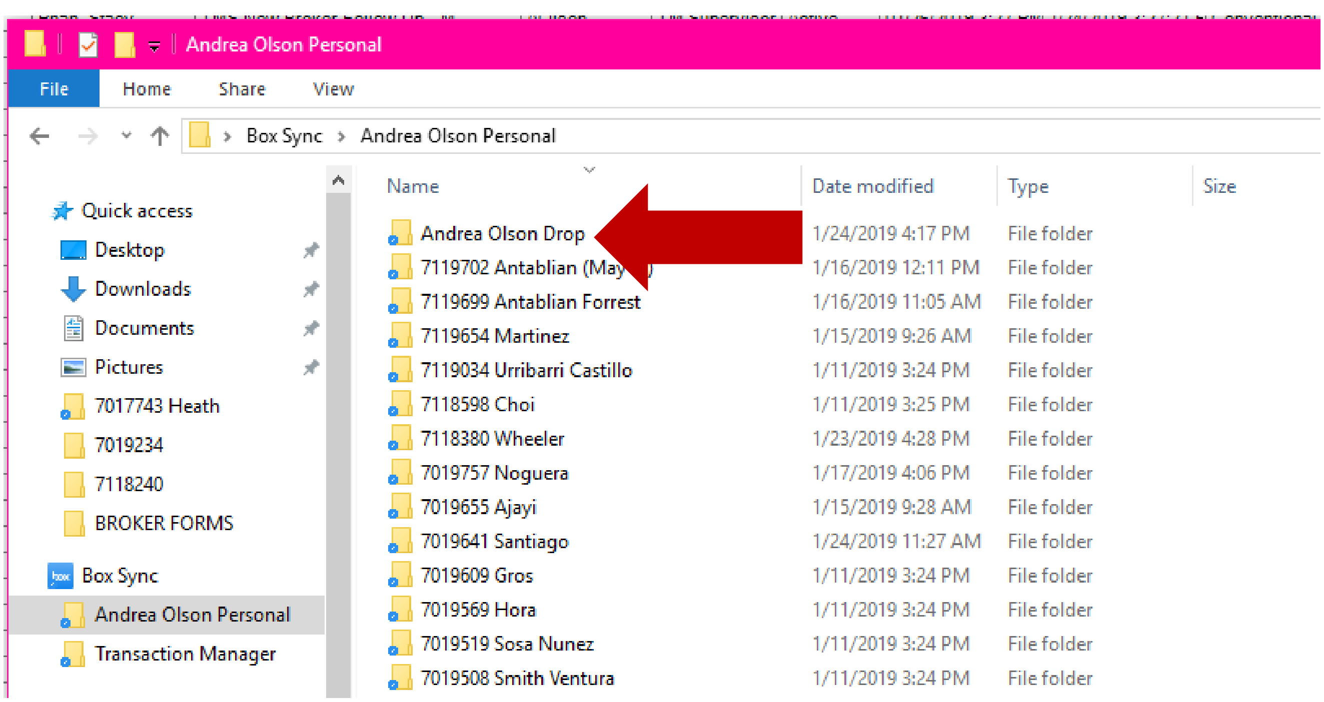
To begin uploading conditions from the BOX folder to Doc Velocity – Open the file in Doc Velocity.



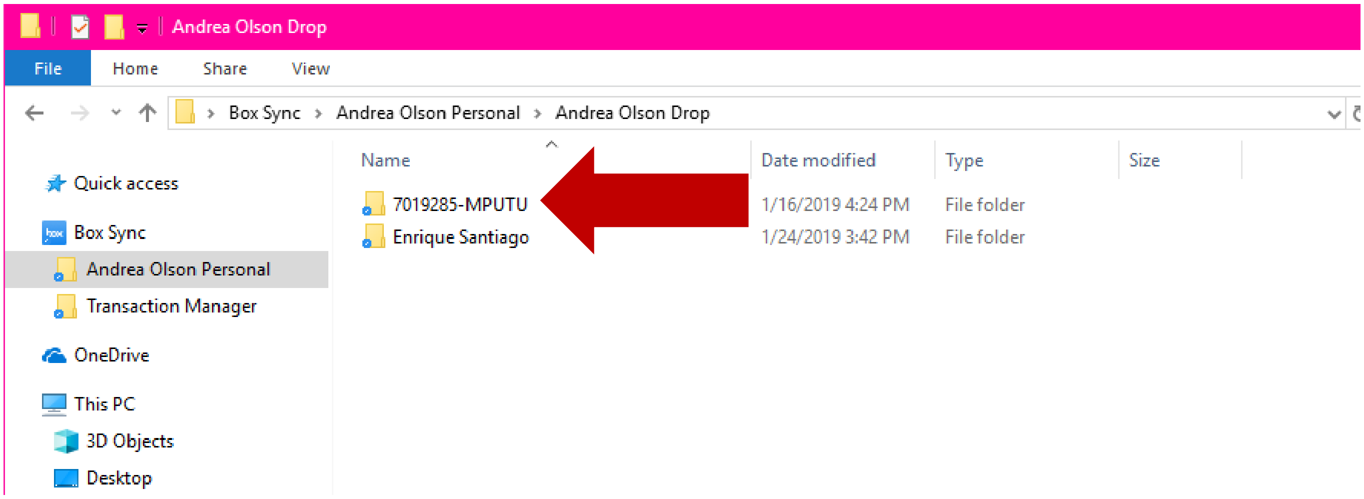
From the “File Explorer” folder open your PERSONAL folder



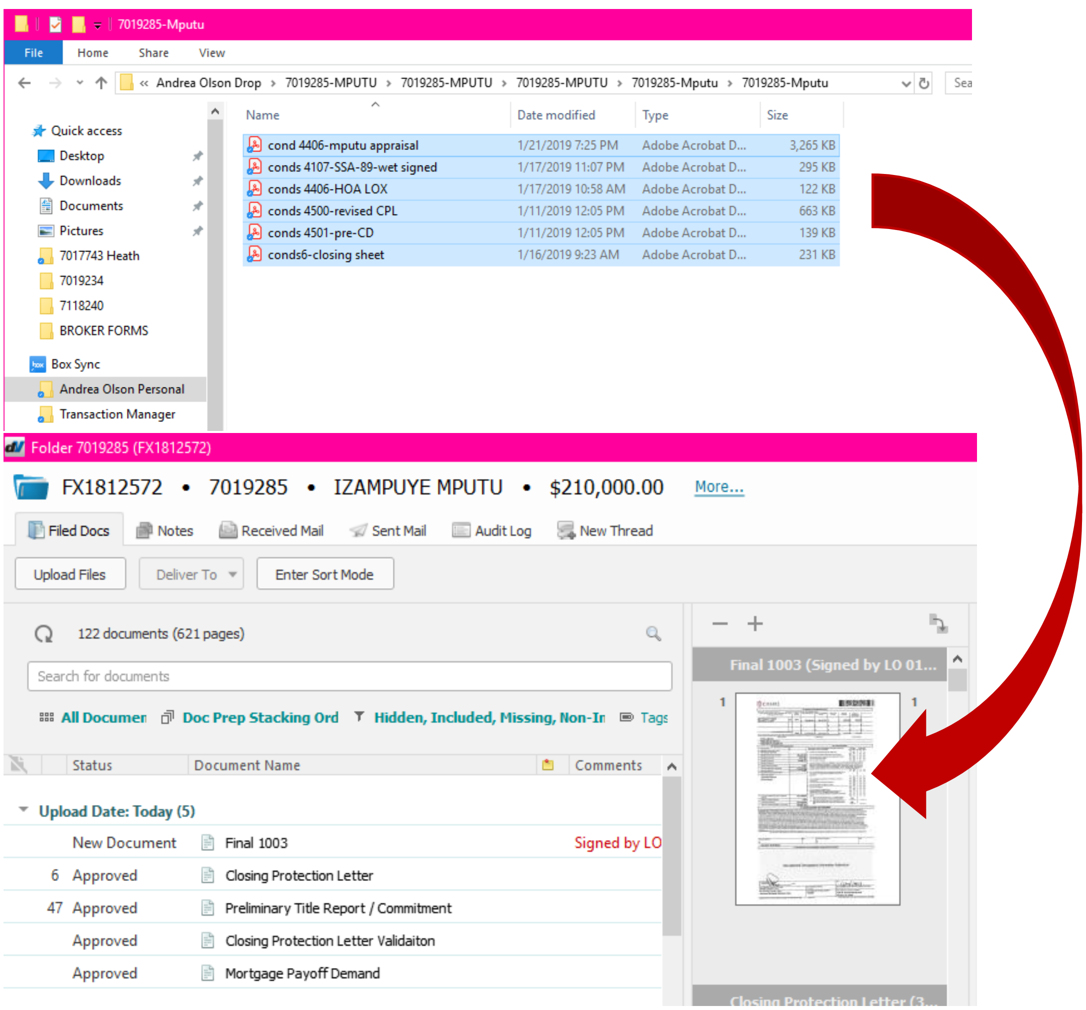
Then locate & open the DROP folder



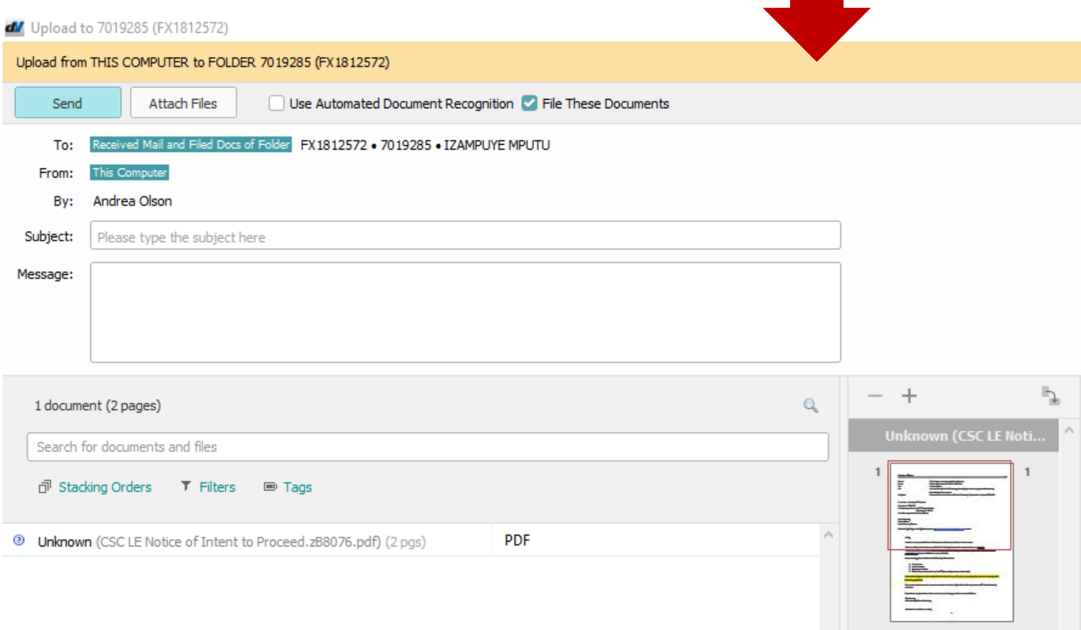
Open the folder for the file with conditions to upload



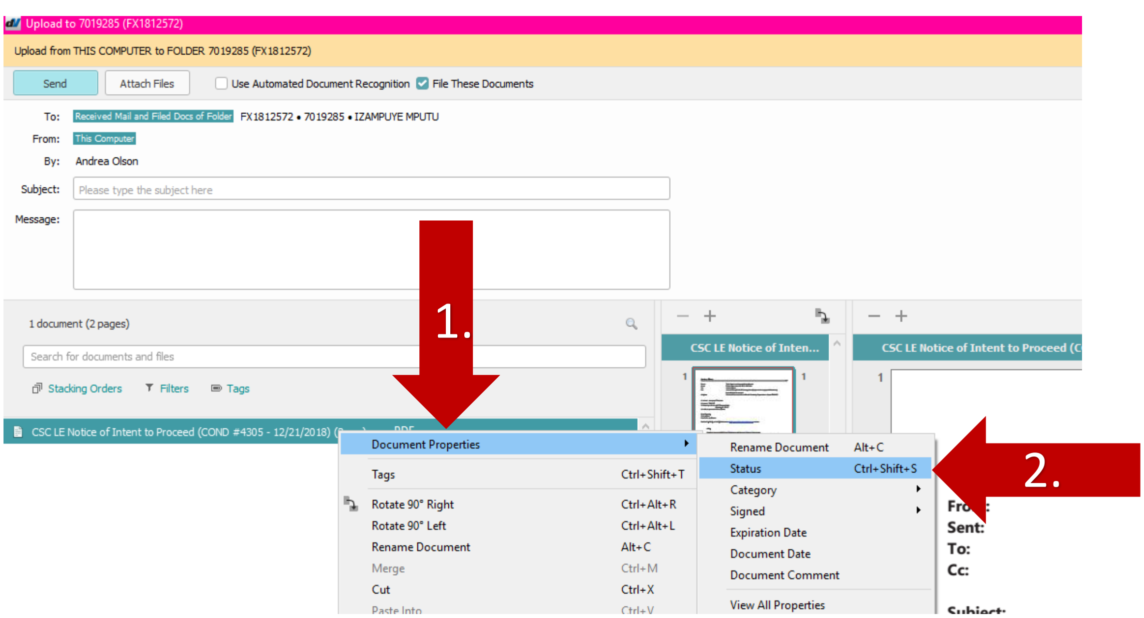
Select ALL conditions in the folder. Drag & drop the conditions into Doc Velocity



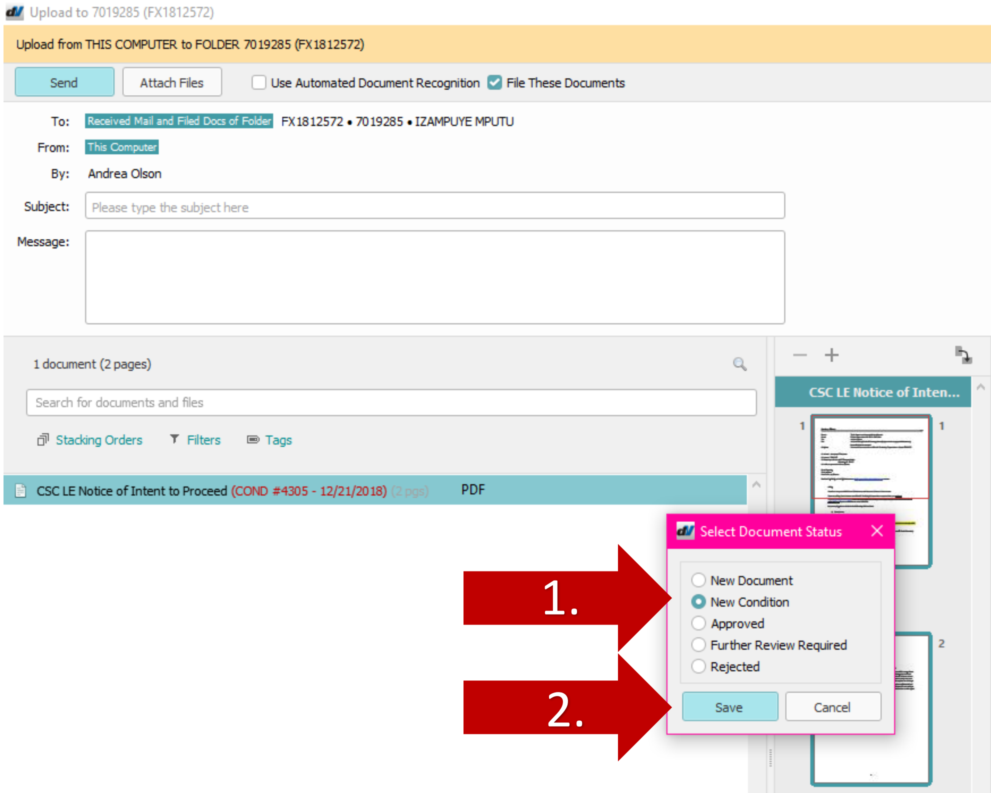
When conditions have been dropped into Doc Velocity, another window will pop up reflecting a yellow band at the top of the screen. This confirms you are in upload mode where you can label the conditions.



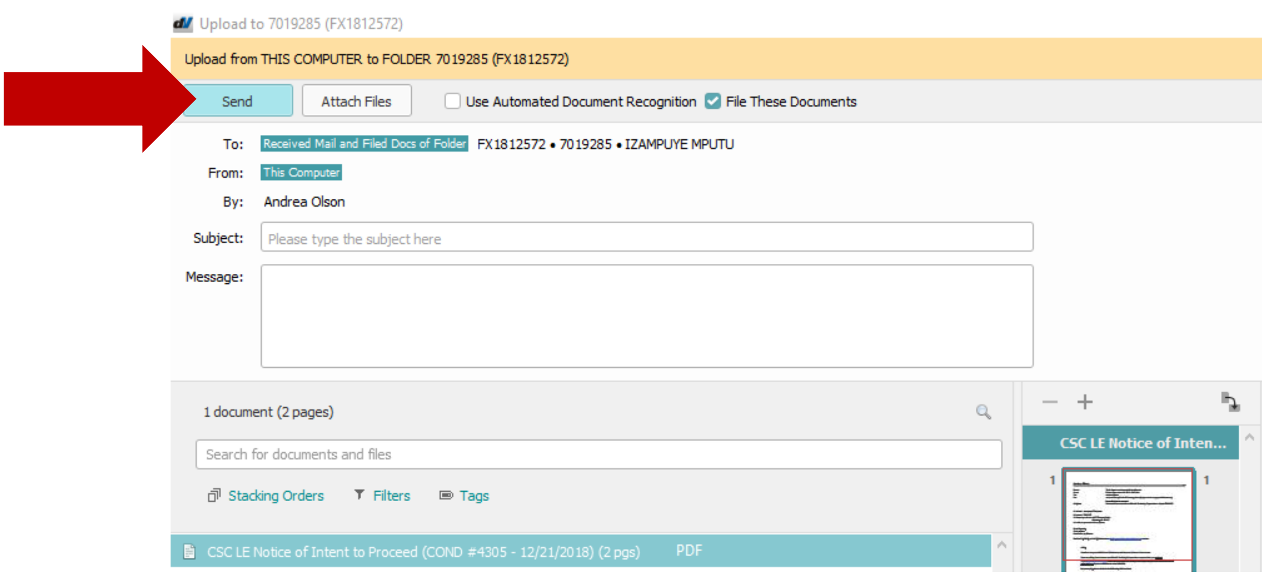
Once conditions are properly labeled in Doc Velocity – Highlight all items and right click. A drop down will appear select "Document Properties" and then select "Status"



"Select Document Status" will pop up. Select "NEW CONDITION" and "SAVE"

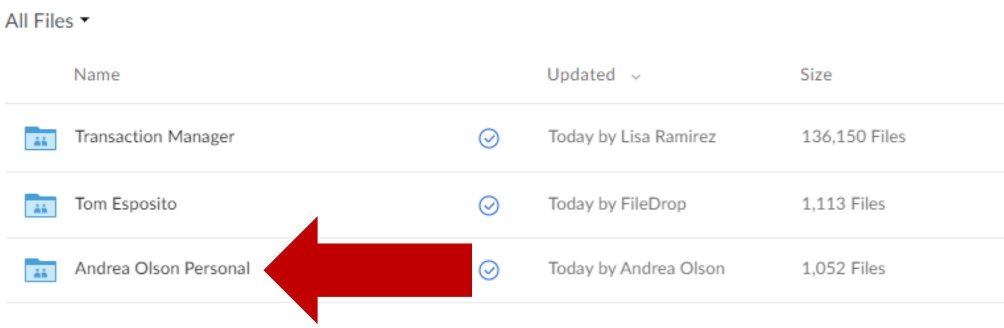


Document status is now complete – Select "SEND" at the top left hand corner of the Doc Velocity upload screen. Conditions have been successfully added to the file.

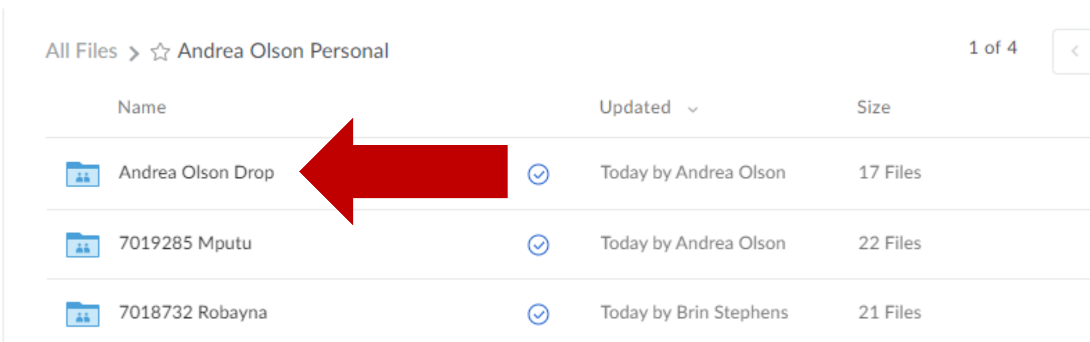


Once the conditions have been uploaded to Doc Velocity – Next step is to move the conditions the Broker uploaded from the DROP folder to the folder created by Loan Set Up. This folder is located in PERSONAL.

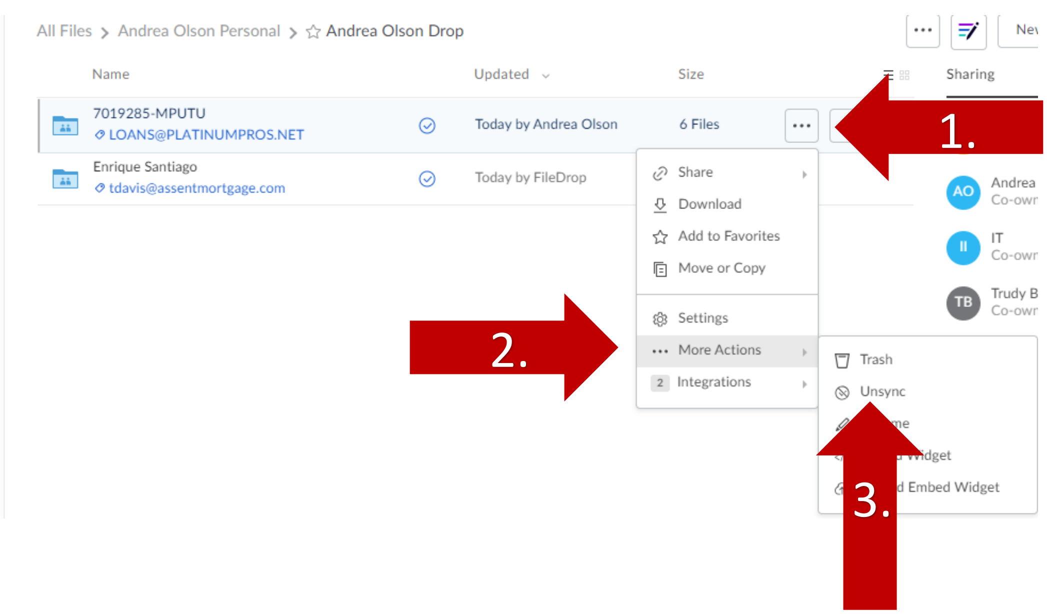
Log into BOX and open PERSONAL folder



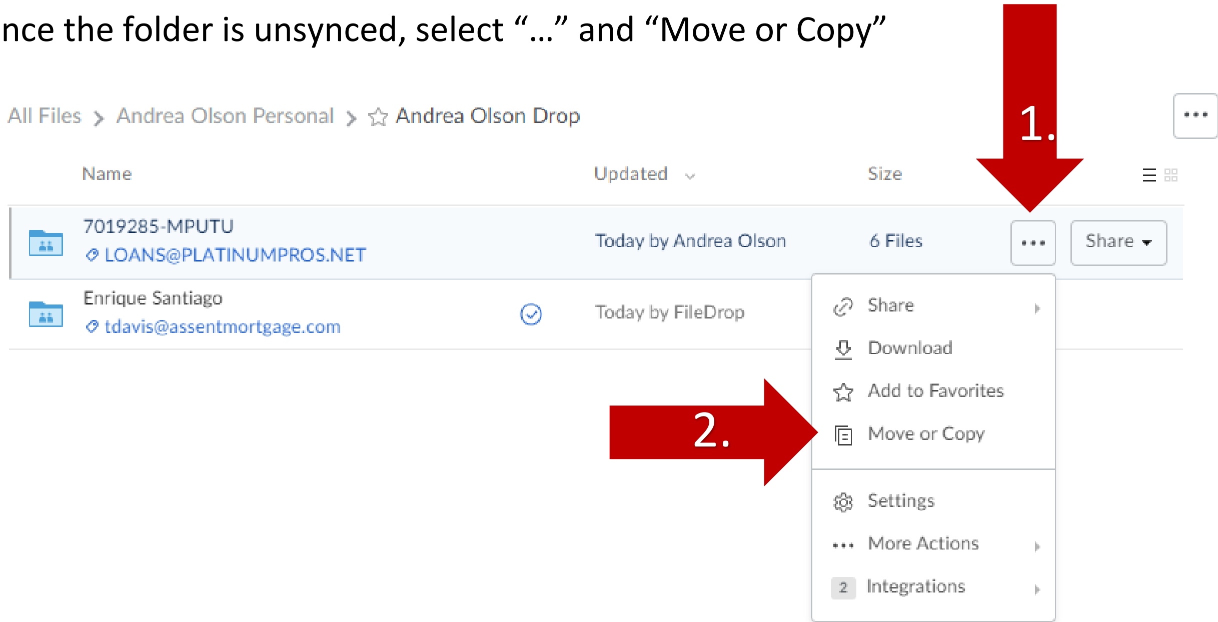
Open DROP folder



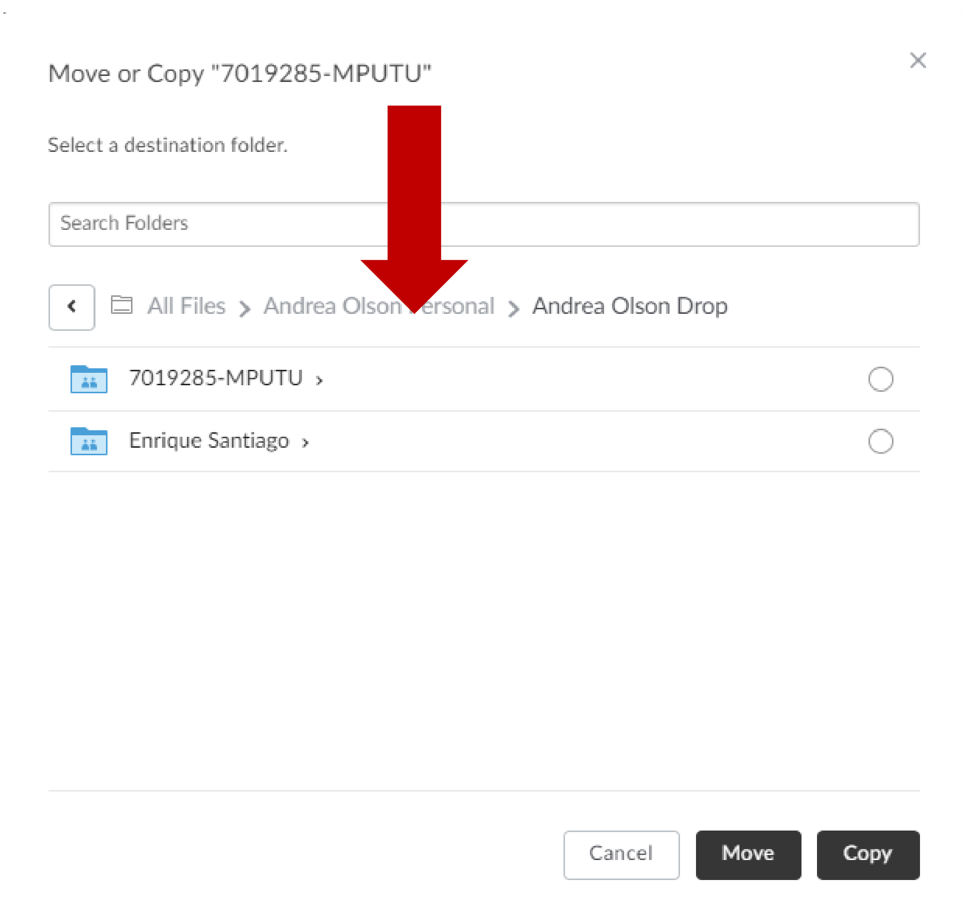
Run the mouse over the folder containing the conditions just uploaded to Doc Velocity in order to select "…". Select "More Actions" and "Unsync".



Once the folder is unsynced, select "…" and "Move or Copy"

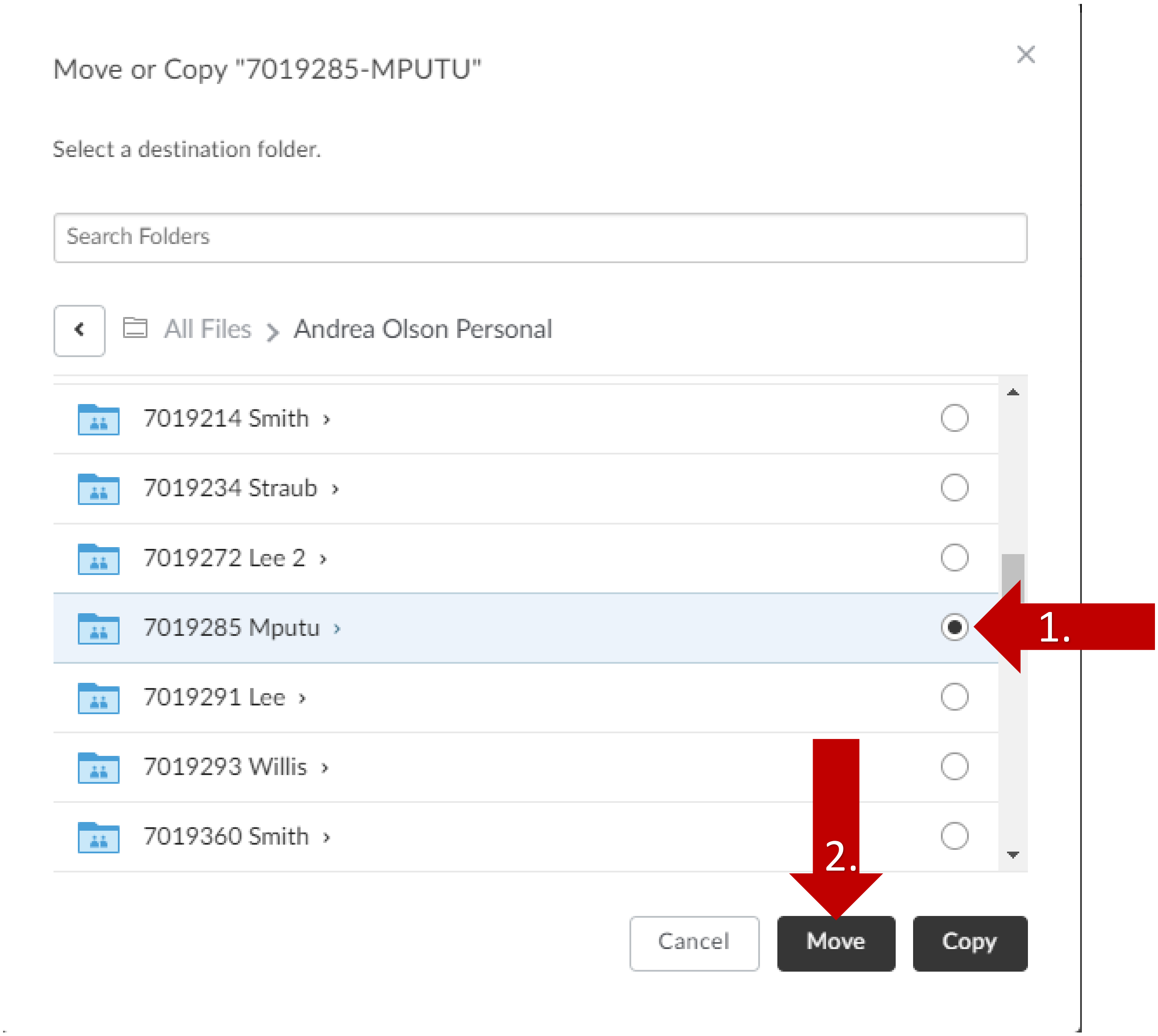


A window will pop up – Select PERSONAL folder



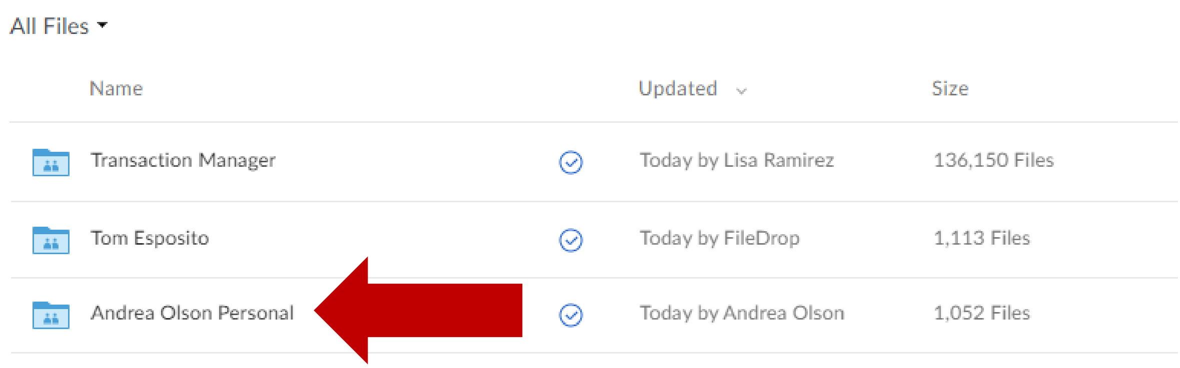
Scroll through to find and select the folder reflecting the loan number and last name of the file. Select “Move”.

NOTE – Using the “Search Folders” field is NOT recommended as the folder will NOT stay moved.

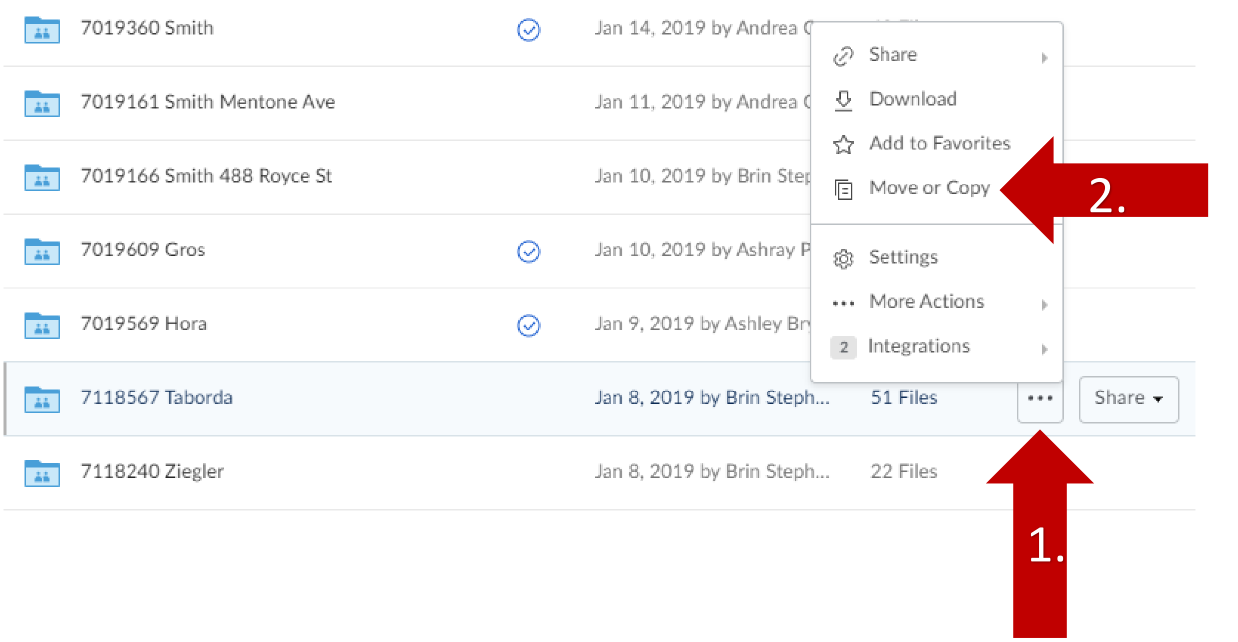


Once a file has been CLOSED or CANCELLED - These files are to be moved to the TRANSACTION MANAGER folders in BOX.

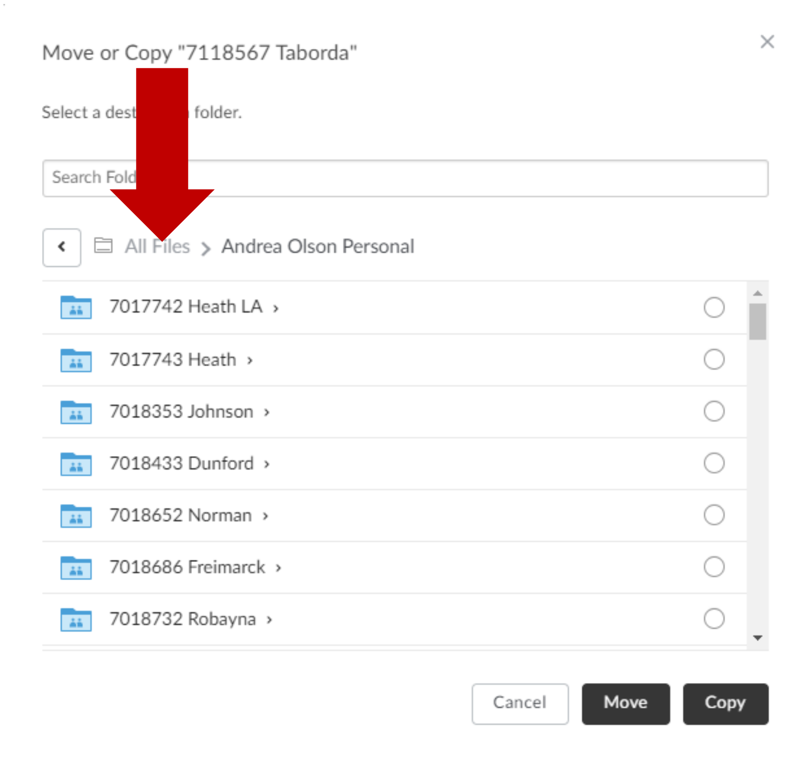
Log into BOX and open PERSONAL Folder



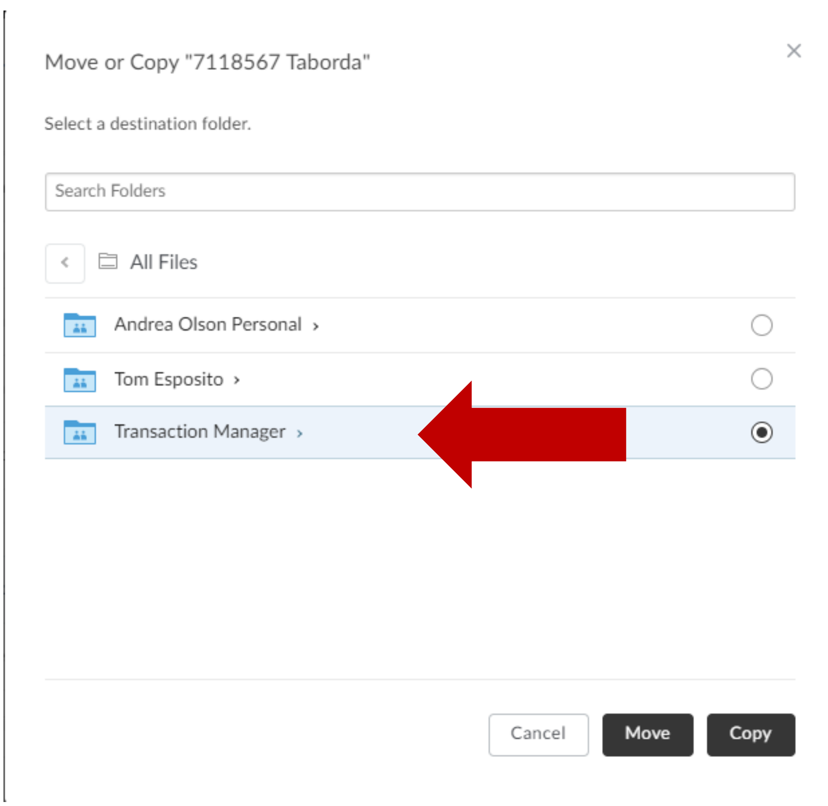
Run the mouse over file that was either CLOSED or CANCELLED, select "…" and "Move or Copy"



A window will pop – Select ALL FILES



Select the TRANSACTION MANAGER folder



Select which folder is appropriate for the file that is being moved – CLOSED or CANCELLED and "Move"