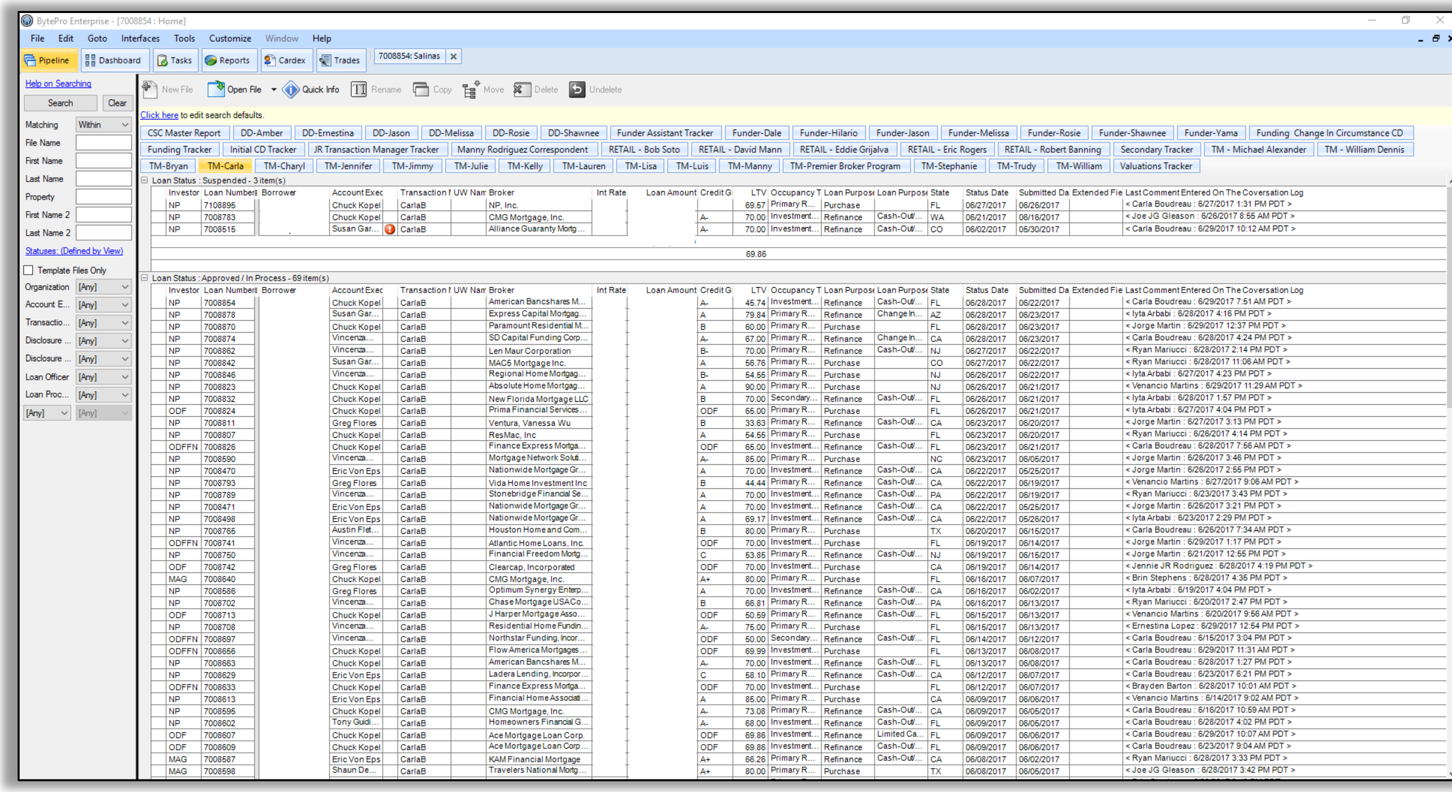
CITADEL
SERVICING CORPORATION

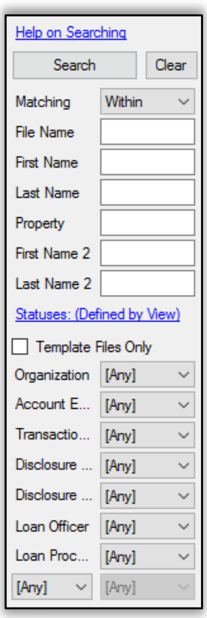
BytePro Guide

Overview

Pipeline View

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





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 Manger, Account Executive or Loan Officer.
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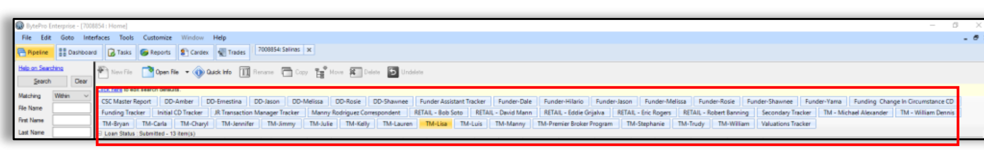
- The "Quick Search" buttons at the top of the screen can also be used:

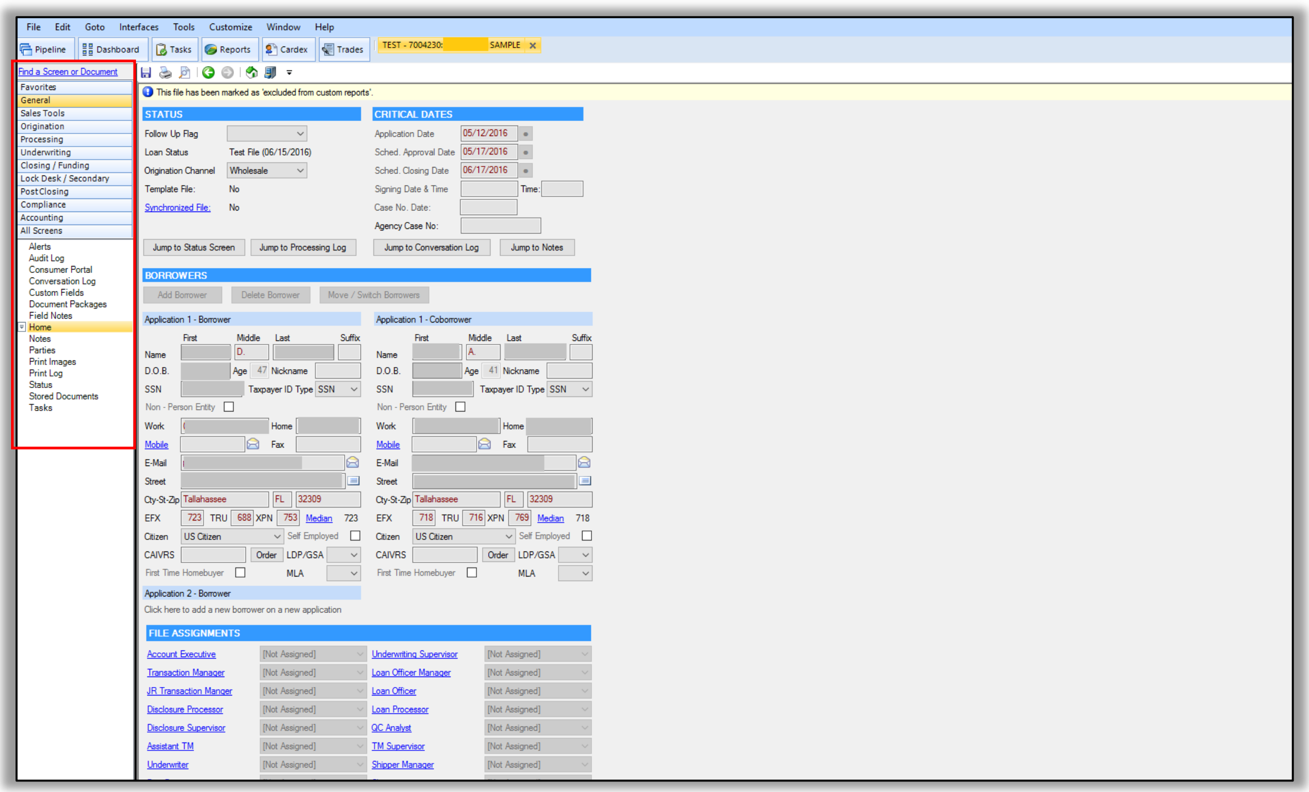


Working within Files

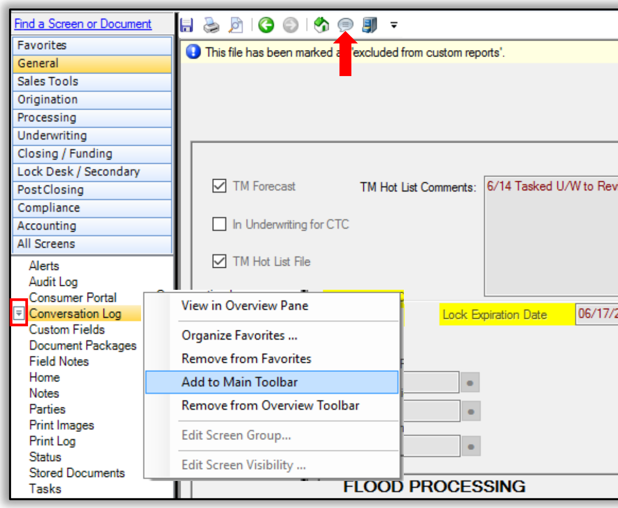
Home Screen Within a File

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.



Adding Shortcuts



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

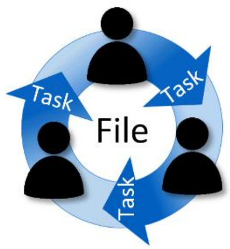
1. Select the screen you want to add to your toolbar.

2. Click the arrow to the left of the screen selection.

3. Select "**Add to Main Toolbar**" from the pop up menu.

4. A custome shortcut icon will be added to the toolbar.

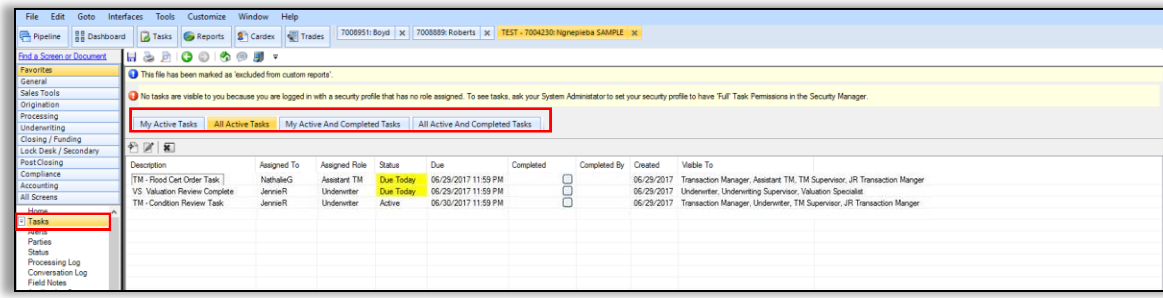
Tasks



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 Manger (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

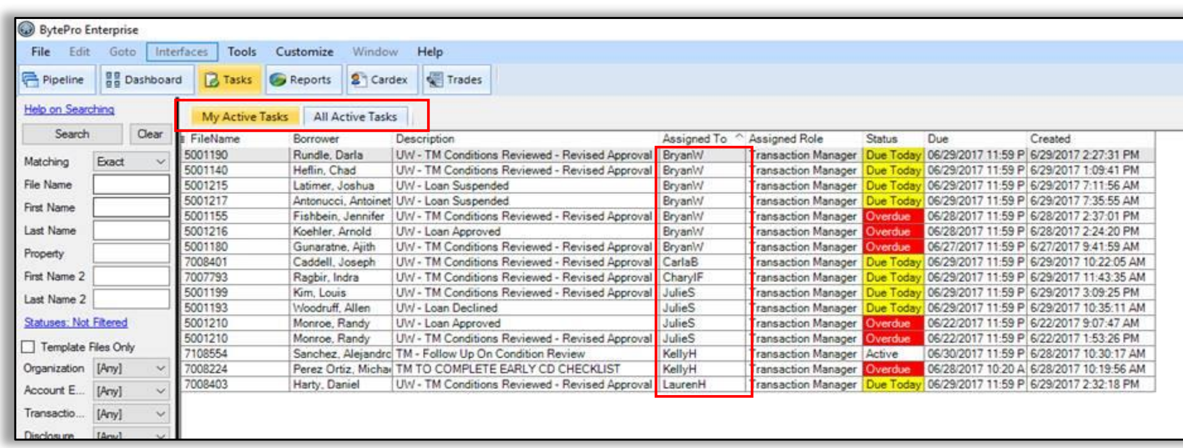
To view tasks assigned to a specific file, select "Tasks"from the screen selections.Then, select the **task tabs** top see **all active tasks** or all tasks assinged to you.



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.

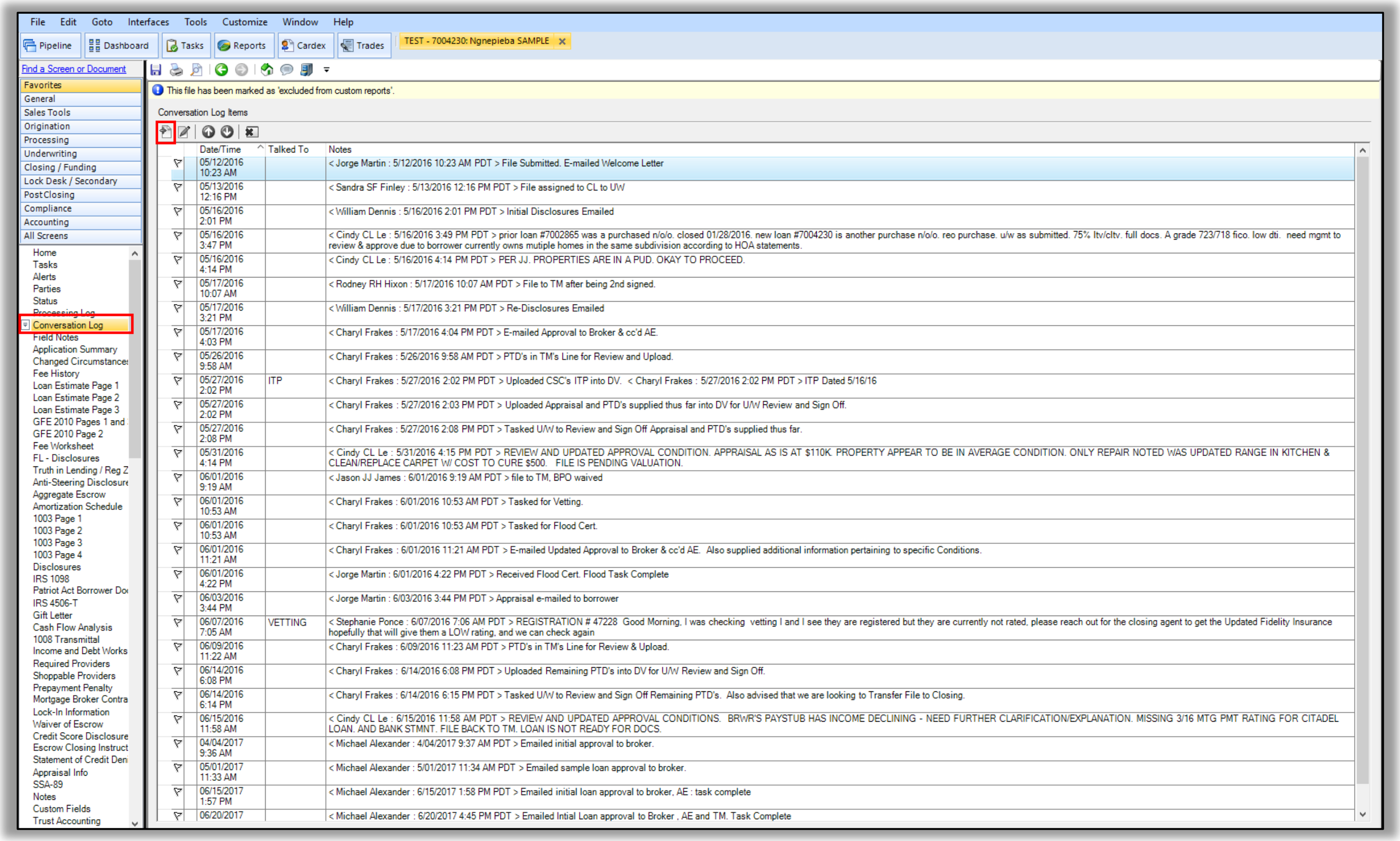


Conversation Log

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.



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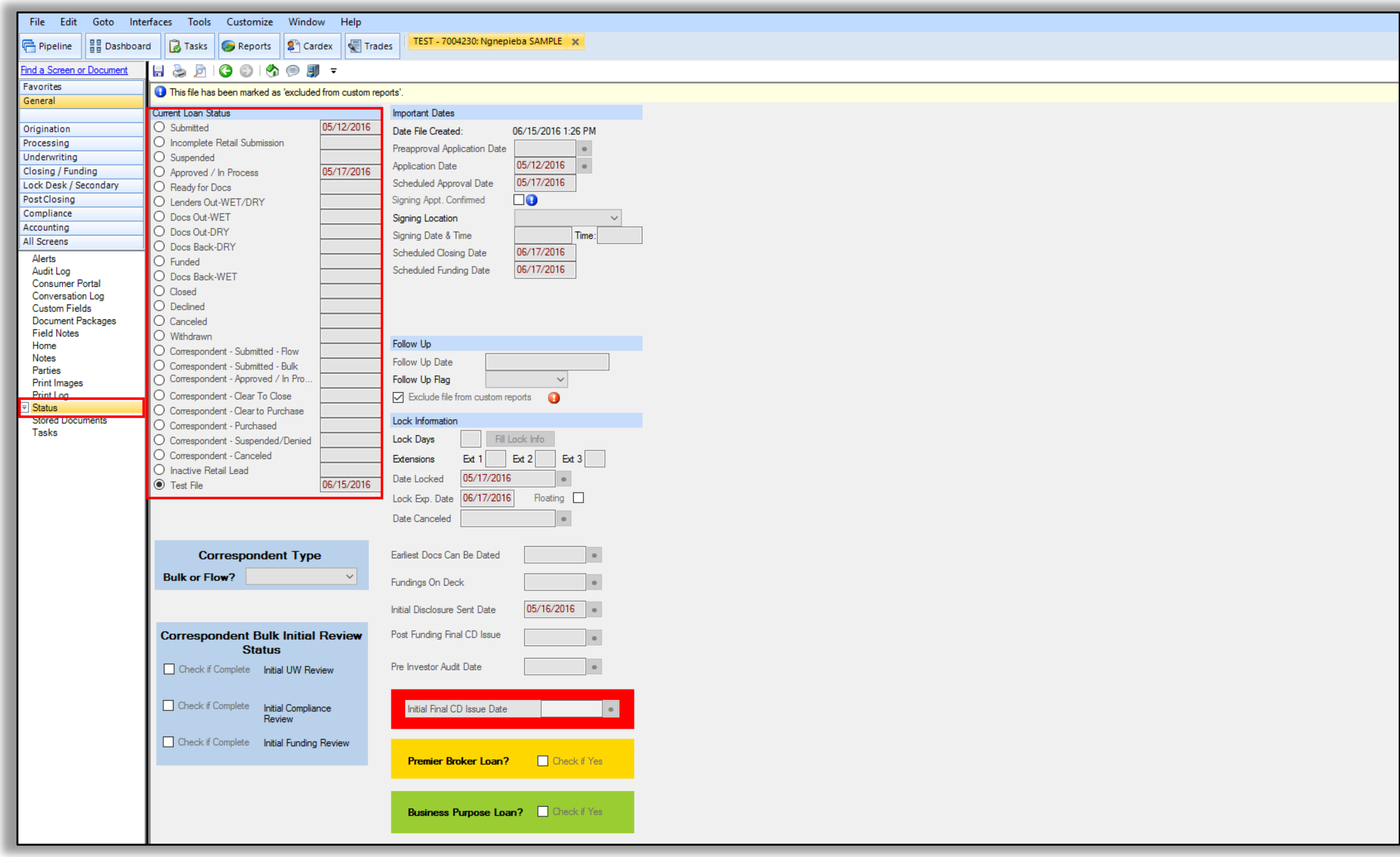
Status Screen

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.*



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.