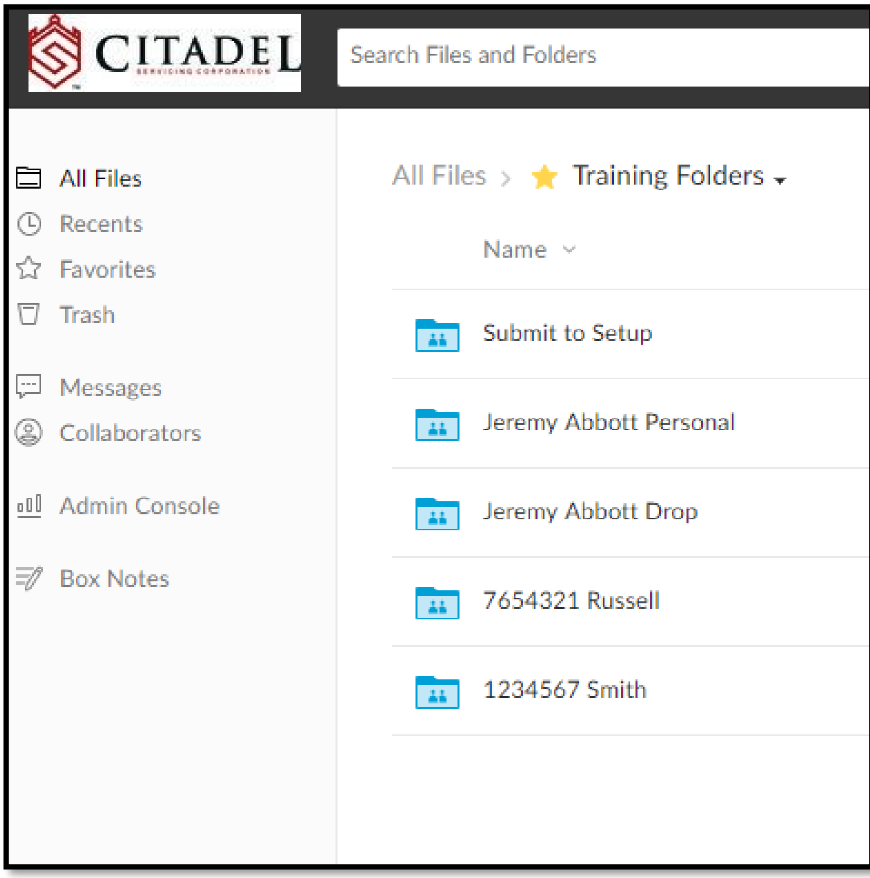
box User Guide—Account Executives



Folder List

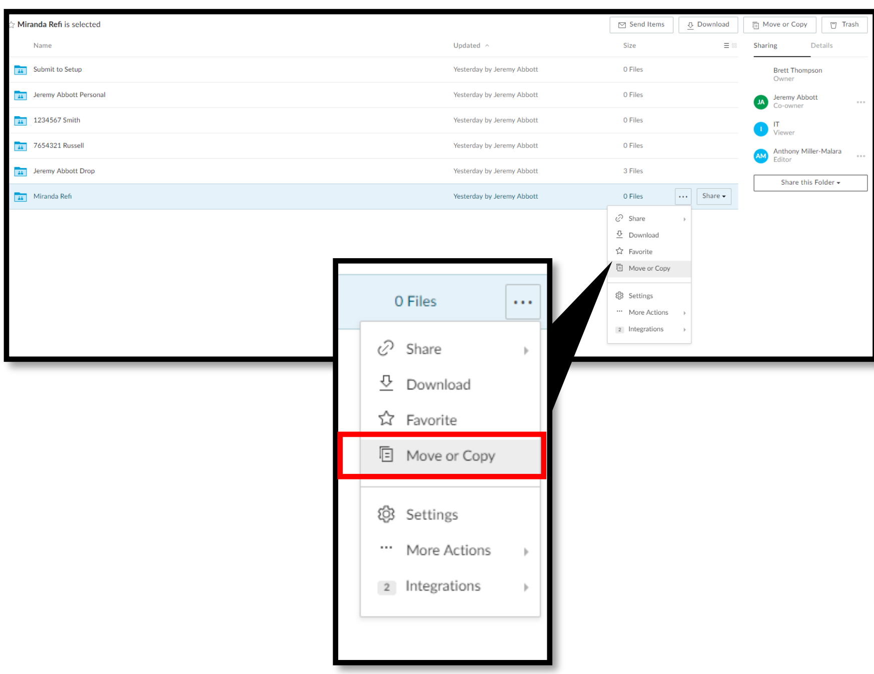
Submit to Setup Used for initial submission only. Once your submission package is complete, you will move the folder created for your loan here. *Loan setup will move the file once it has been completed.*

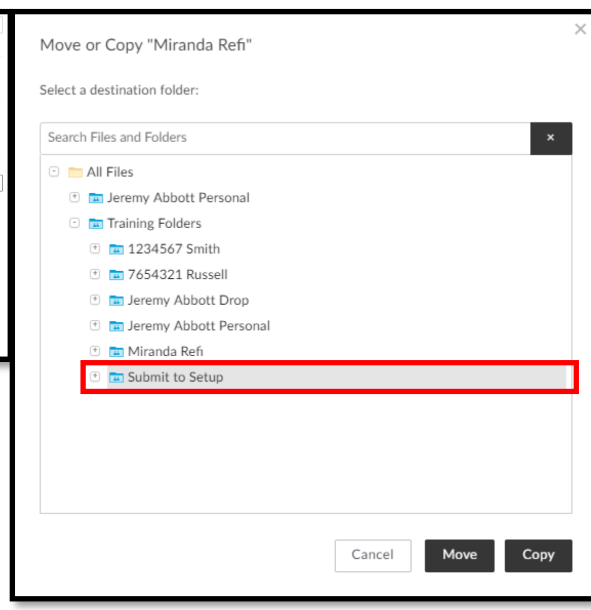
[Your Name] Personal Your personal folder within Box to store files to move or copy.

[Your Name] Drop Files will appear here when they are uploaded from the CSC website.

Loan Files After the submission process, the Transaction Manager will share the file that has been created once a loan number is generated.

New Submissions

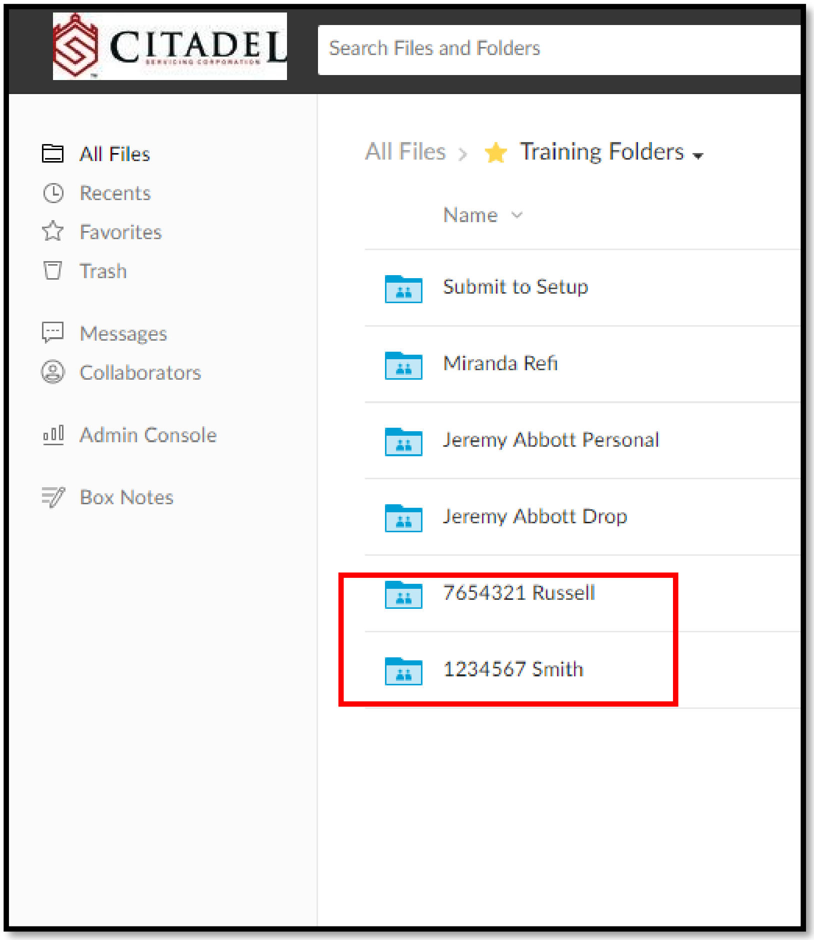




1. After creating a new folder for a new loan, import all required submission documents into it.
2. Select *Move or Copy* from the folder dropdown menu and select the *Submit to Setup* folder. *Move* will take the entire folder and completely move it from its current location. *Copy* will create a copy of the selected folder and place it in the setup folder, leaving the original in its current location.

box User Guide—Account Executives

After Submission



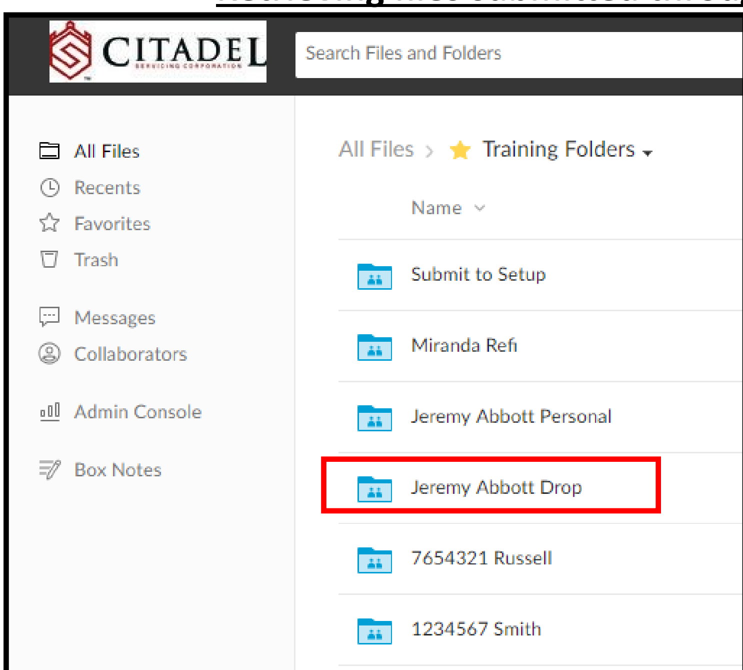
<u>Loan Files:</u> Once the loan is in process with the Transaction Manager, you can view the files associated with it in the file that is shared with you.

<u>Permissions:</u>

<u>Account Executives:</u> AE's will be able to view all files that have been uploaded and also upload files as needed to the folder.

<u>CSC Website:</u> Alternatively, Brokers and their associates can still upload via the CSC website. Files will appear your personal drop folder.

Retrieving files submitted through the CSC website



<u>CSC Website>Resources>Wholesale File Upload</u>

Brokers can upload their submission items through the Citadel Servicing Website. Once they do so, you can retrieve them from your

*****<u>Make sure you double check that the file you are moving or copying is being moved into the correct file, by verifying the loan number and the borrower last name.</u>*****