

User Guide for Creating and Editing Tasks in Bytepro



General Guide for creating, assigning and completed tasks within the Bytepro System.

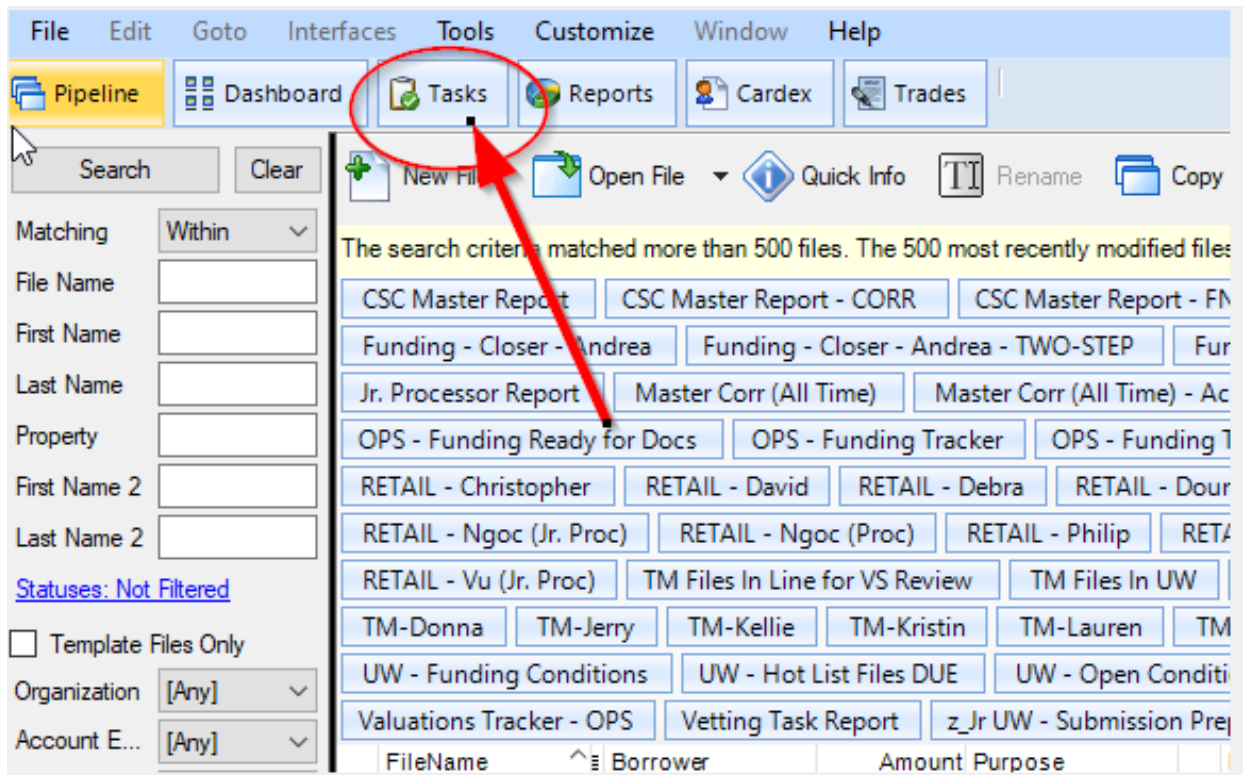
When login to the system you will be prompted to you home page. (Listed below)

Please note: the illustration may look different from yours depending on your credentials within the system. (Will not have as many tabs on your screen)

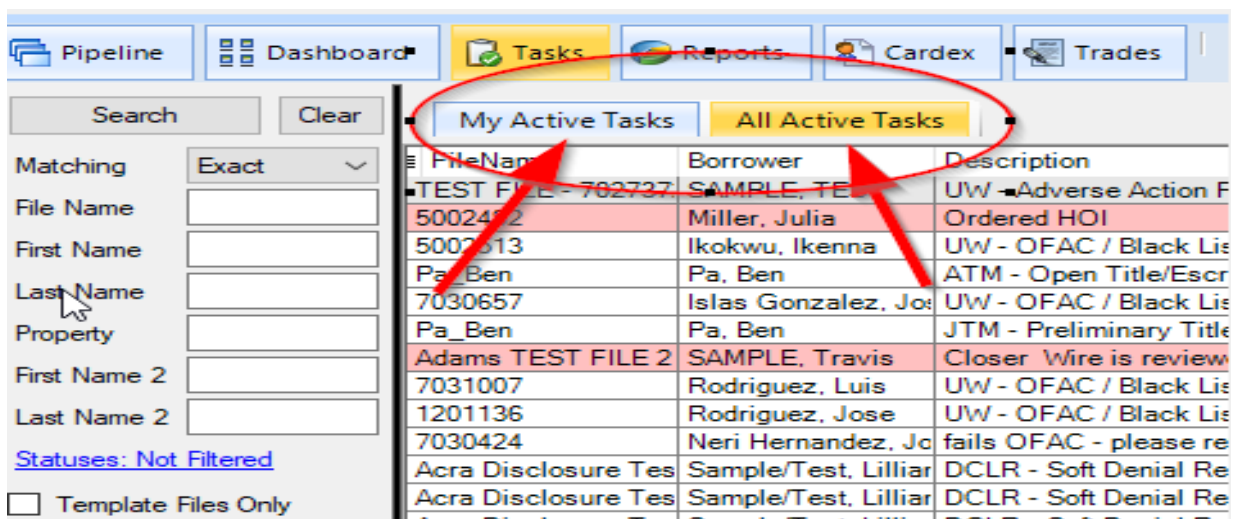
The screenshot displays the Bytepro System interface. At the top, there are navigation tabs: Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. Below these is a search bar with a 'Search' button and a 'Clear' button. To the right of the search bar is a toolbar with icons for New File, Open File, Quick Info, Rename, Copy, Move, Delete, and Undelete. Below the search bar, there is a section for search criteria with fields for File Name, First Name, Last Name, Property, First Name 2, and Last Name 2. Below these fields is a 'Statuses: Not Filtered' link. To the left of the main table, there are several filter options: Template Files Only, Organization, Account E..., Transaction..., Disclosure..., Loan Officer, and Loan Proc... Each filter has a dropdown menu with '[Any]' selected. The main table displays search results with columns: FileName, Borrower, Amount, Purpose, Loan Officer, Processor, Account Exec, Transaction I, Disclosure Pi, and Disclo. The table contains 20 rows of data, each with a unique file name and associated details. The table is color-coded by row, alternating between light green, light orange, and light blue. The first row is light green, the second is light orange, and the third is light blue. The table is followed by a row of buttons for various actions: CSC Master Report, CSC Master Report - CORR, CSC Master Report - FNF-DSCR, CSC Master Report - MF, CSC Master Report - Retail, CSC Master Report - Funding - Closer - Andrea, Funding - Closer - Andrea - TWO-STEP, Funding - Closer - Ashley, Funding - Closer - Ashley - TWO-STEP, Funding - Closer - Delic, Jr. Processor Report, Master Corr (All Time), Master Corr (All Time) - Active, Master Corr (Month to Date), Master Corr (Month to Date) - Active, Master Co, OPS - Funding Ready for Docs, OPS - Funding Tracker, OPS - Funding Tracker BY PURPOSE, Processing Pipeline 4506T, Purchasing Delay Report, RETAIL - RETAIL - Christopher, RETAIL - David, RETAIL - Debra, RETAIL - Dounya (Jr. Proc), RETAIL - Eugene, RETAIL - Jas, RETAIL - Jennifer, RETAIL - Jesse, RETAIL - Ngoc (Jr. Proc), RETAIL - Ngoc (Proc), RETAIL - Philip, RETAIL - Rigo, RETAIL - RobertE, RETAIL - Rosemarie, RETAIL - Scott, RETAIL - Sherry, RETAIL - Vu (Jr. Proc), TM Files In Line for VS Review, TM Files In UW, TM Final 1003 Signed by LO, TM-30 Day Notice, TM-Aged File Follow Up, TM-Ale, TM-Donna, TM-Jerry, TM-Kellie, TM-Kristin, TM-Lauren, TM-Laurie, TM-Leah, TM-Lindsay, TM-Lisa, TM-Lola, TM-Maria, TM-Miche, UW - Funding Conditions, UW - Hot List Files DUE, UW - Open Conditions, UW - Open Conditions - CORR, UW - POA Reviews, UW - Second Signature Re, Valuations Tracker - OPS, Vetting Task Report, z_Jr UW - Submission Prep, z_UW - Bank Statement Analysis, zLegal - Entity Reviews, zLegal - POA Reviews.

FileName	Borrower	Amount	Purpose	Loan Officer	Processor	Account Exec	Transaction I	Disclosure Pi	Disclo
10001320	GUO, XIN	267,606.00	Purchase			MarcF	ErikN		
11000026	FENG, ANGELA	458,500.00	Purchase			MarcF			
237000001	Sato, Lucio	143,500.00	Purchase			HarveyG	DeannaD	JosephineS	Jorge
237000005	LC Wood Avenu...	348,750.00	Refinance			RobertJ	DeannaD	JosephineS	Jorge
237000009	PINES BY THE...	568,000.00	Purchase			RobertJ	DeannaD	IanT	Jorge
237000011	Clarkson Propert...	102,900.00	Purchase			RaymondR	DeannaD	StacyJ	Jorge
237000012	North Avenue H...	1,875,000.00	Purchase	RaymondR	KimberlyB	RaymondR	KimberlyB	StacyJ	
237000013	3 Coe Farm LLC	780,000.00	Purchase	RaymondR	KimberlyB	RaymondR	KimberlyB	JosephineS	Jorge
237000015	Set 42, LLC	120,750.00	Purchase			RobertJ	DeannaD	JosephineS	Jorge
237000016	Egerton Holding...	413,000.00	Refinance	RaymondR	DeannaD	RaymondR	DeannaD	IanT	Jorge
3001046	KSEL Investmen...	583,000.00	Purchase			IanO	LaurieD	IanT	Jorge
3001070	9401 Goldenrod...	1,680,000.00	Purchase			MIKirk	DonnaA	GuadalupeS	Jorge
3001075	DGF LLC	375,000.00	Refinance			IanO	KristinG	JosephineS	Jorge
3001079	Olive Holdings...	911,250.00	Refinance			RyanB	BIID	JamesF	Jorge
3001083	Talukder, Moha...	560,000.00	Purchase			MichaelF	NathalieG	JosephineS	Jorge
3001090	Exoventures Glo...	1,241,000.00	Purchase			JustinL	DonnaA	JamesF	Jorge
3001094	Mahmood, Sajid	1,200,000.00	Refinance			JTomasello	MichelleM	GuadalupeS	Jorge

Now there is a couple ways to find the task/s that have been assigned to you. The simplest way is simply by clicking on the Tasks Tab located at the Top of the menu bar. (Shown below)



Once you have clicked that the system will generate two tabs.



After this selection has been done you can the filter the tasks by department and then role. **For example, please see below.**

The screenshot displays the Byte Pro interface. On the left, there are input fields for 'Last Name', 'Property', 'First Name 2', and 'Last Name 2'. Below these is a link 'Statuses: Not Filtered' and a checkbox 'Template Files Only'. A red box highlights a series of dropdown menus for filtering: 'Organization', 'Account E...', 'Transaction...', 'Disclosure ...', 'Disclosure ...', 'Loan Officer', 'Loan Proc...', and two additional '[Any]' dropdowns. A red arrow points to the 'Account E...' dropdown. On the right, a table lists tasks with columns for ID, Name, and Status. Some rows are highlighted in red.

ID	Name	Status
7030657	Islas Gonzalez, Jo	UW - (
Pa_Ben	Pa, Ben	JTM -
Adams TEST FILE 2	SAMPLE, Travis	Closer
7031007	Rodriguez, Luis	UW - (
1201136	Rodriguez, Jose	UW - (
7030424	Neri Hernandez, Jo	fails C
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR
1201174	Chong, Robert	UW - (
7030830	MN BK Capital, LLC	Comm
7031109	Grace & Hope Inve	Comm
Empower9	America, Andy	UW - F
Empower9	America, Andy	Doc D
Empower9	America, Andy	Closer
7031101	LRHansen, LLC	Comm
Empower9	America, Andy	Funde
7030599	Tabet Family Trust	Comm
5002665	McQuaid, Jason	UW - (
LD - 3MBS Test File	SAMPLE, Kiet	UW - T
LD - 3MBS Test File	SAMPLE, Kiet	UW - T
5002667	Mills, Garfield	UW - (
5002647	Zapp Holdings, LLC	Comm

This is located on the left-hand side of the screen within Byte Pro.

Once role has been established simply filter by name. (Shown below)

The screenshot shows a software interface with a dropdown menu for filtering by name. The dropdown is open, showing a list of names. A red circle highlights the dropdown menu, and a red arrow points to the 'AshleyP' entry. To the right, a table of data is visible, with some rows highlighted in red.

Organization	Account E...	Transaction...	Disclosure ...	Disclosure ...	Loan Officer	Loan Proc...
[Any]	[Any]	[Any]	[Any]	[Any]	[Any]	[Any]
			AGauder			
			AlexC			
			AmyV			
			ANunn			
			AOlson			
			ArdenH			
			AshleyM			
			AshleyP			
			AbraR			
			BarbaraS			
			BethO			
			BetsyS			
			BillD			
			BrandyB			
			BraydenB			
			BrinS			
			CameronH			
			CarlaB			
			Camenr			
			CharlieW			
			CharylF			
			ChristinaDLL			
			ChristineH			
			DarciL			
			DavidB			
			DavinaH			
			DByum			
			DDDominguez			
			DeannaD			

Acra Disclosure Tes	Sample/Test, Email	DCLR - Soft
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft
1201174	Chong, Robert	UW - OFAC
7030830	MN BK Capital, LLC	Commercial
7031109	Grace & Hope Inve	Commercial
Empower9	America, Andy	UW - Fundin
Empower9	America, Andy	Doc Drawer
Empower9	America, Andy	Closer Wire
7031101	LRHansen, LLC	Commercial
Empower9	America, Andy	Funder - DR
7030599	Tabet Family Trust	Commercial
5002665	McQuaid, Jason	UW - OFAC
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Co
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Co
5002667	Mills, Garfield	UW - OFAC
5002547	Zone Holdings, LLC	Commercial
7031464	Siegel, Blayne	Funder - DR
7031543	Jay, Julianne	fails OFAC.
Dapko TEST FILE	SAMPLE, David	Re-Disclosu
7031703	Rye Lake Oasis Inc	Commercial
7031704	Rye Lake Oasis, In	Commercial
7031306	BRD Real Estate In	Commercial
7031220	Grupo 22 LLC	Commercial
7032748	Kerr, Michael	TM - New Fi
7032036	Rubinsky, Gilad	Wire Desk -
7031766	Howard, Eric	Wire Desk -
7032851	Valenzuela, Victor	UW - Proper
5002727	Braun, Larry	TM - Borrow
7032945	Govil, Atul	UW - Proper
7032945	Govil, Atul	TM - New Fi

Click on your name then click **Search** once you have the filtered list. Click on **My Active Tasks**, the system will then give a personal list of currently active tasks assigned to you. **(Please below) Please see the numbered illustration.**

The screenshot shows a web application interface with a search filter on the left and a task list on the right. Red arrows and numbers 1-4 indicate the steps to view 'My Active Tasks'.

Search Filter (Left):

- Search:** A button circled in red with a red arrow pointing to it from the 'Search' label.
- Transaction:** A dropdown menu with 'DonnaA' selected, circled in red with a red arrow pointing to it from the 'Search' label.
- Organization:** A dropdown menu with '[Any]' selected.
- Account E...:** A dropdown menu with '[Any]' selected.
- Disclosure ...:** A dropdown menu with '[Any]' selected.
- Loan Officer:** A dropdown menu with '[Any]' selected.
- Loan Proc...:** A dropdown menu with '[Any]' selected.

Task List (Right):

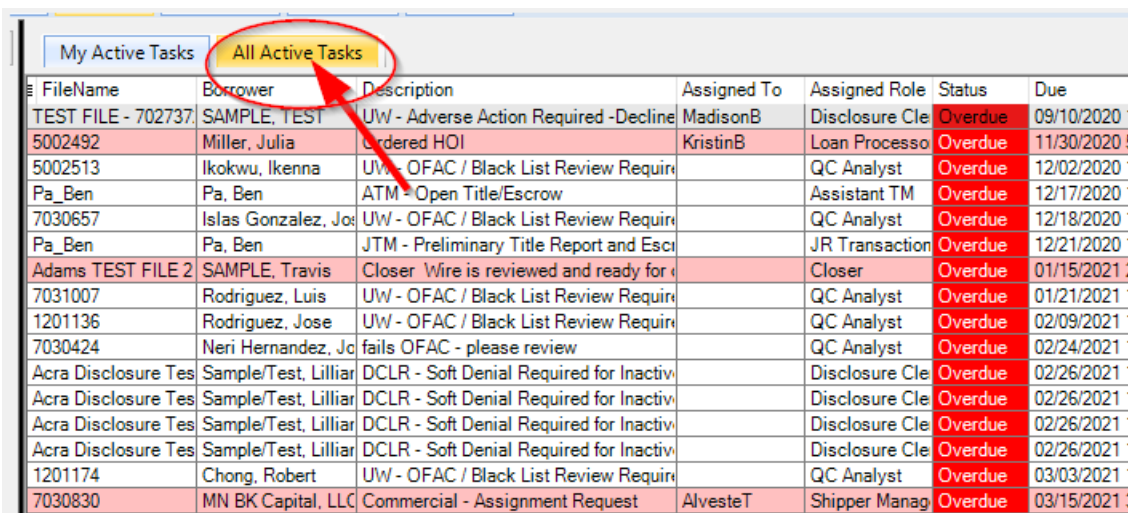
The task list is titled 'My Active Tasks' and 'All Active Tasks'. It contains a table with the following columns: FileName, Borrower, Description, Assigned To, and Ass.

FileName	Borrower	Description	Assigned To	Ass
7041764	McGuire, Tyrone	TM - Borrowers CSC INTENT TO PRO	DonnaA	Tra
7041074	Gehler, Corby	TM - 30 Day Notice Follow Up	DonnaA	Tra
7042084	Guillaume, Bayne	TM - File must be back in UW for initials	DonnaA	Tra
7041630	Zabala Bernal, Eug	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041356	Semchenko-Toumb	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041519	Cvetkovic, Ognjen	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041566	Beckham Plempel,	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041540	Carnovale, Silvestr	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041496	Darias, Hector	TM - 30 Day Notice Follow Up	DonnaA	Tra
7041630	Carnovale, Silvestr	TM - 30 Day Notice Follow Up	DonnaA	Tra

Numbered Illustration:

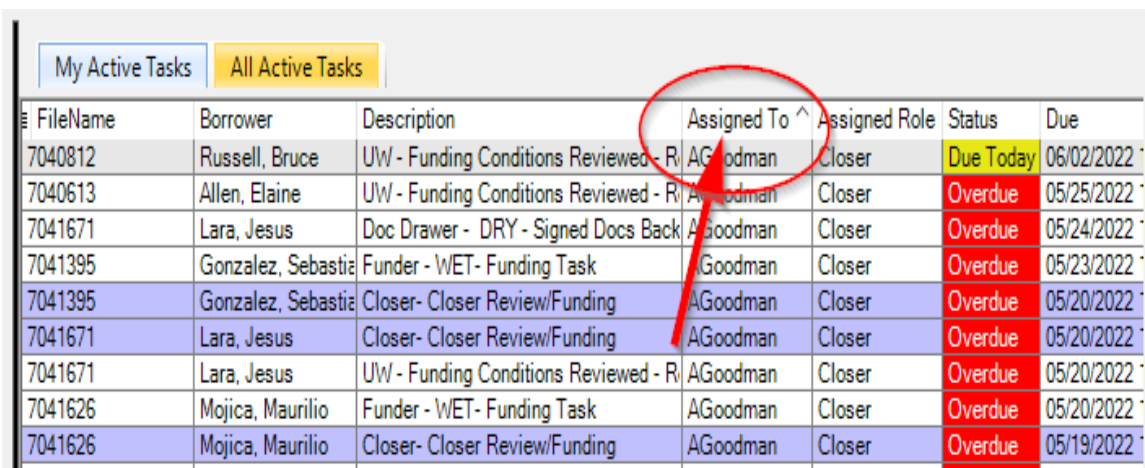
1. Click on your name (DonnaA) in the Transaction dropdown menu.
2. Click on the Search button.
3. Click on the My Active Tasks tab.
4. The system will then give a personal list of currently active tasks assigned to you.

Now you have two options you can click on **All Active Tasks** which will provide all general tasks assigned to everyone within the Company. Note: they will not be any specific order. (As shown below)



FileName	Borrower	Description	Assigned To	Assigned Role	Status	Due
TEST FILE - 702737	SAMPLE, TEST	UW - Adverse Action Required - Decline	MadisonB	Disclosure Cle	Overdue	09/10/2020
5002492	Miller, Julia	Ordered HOI	KristinB	Loan Processo	Overdue	11/30/2020
5002513	Ikokuwu, Ikenna	UW - OFAC / Black List Review Require		QC Analyst	Overdue	12/02/2020
Pa_Ben	Pa, Ben	ATM - Open Title/Escrow		Assistant TM	Overdue	12/17/2020
7030657	Islas Gonzalez, Jos	UW - OFAC / Black List Review Require		QC Analyst	Overdue	12/18/2020
Pa_Ben	Pa, Ben	JTM - Preliminary Title Report and Escr		JR Transaction	Overdue	12/21/2020
Adams TEST FILE 2	SAMPLE, Travis	Closer Wire is reviewed and ready for		Closer	Overdue	01/15/2021
7031007	Rodriguez, Luis	UW - OFAC / Black List Review Require		QC Analyst	Overdue	01/21/2021
1201136	Rodriguez, Jose	UW - OFAC / Black List Review Require		QC Analyst	Overdue	02/09/2021
7030424	Neri Hernandez, Jo	fails OFAC - please review		QC Analyst	Overdue	02/24/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
1201174	Chong, Robert	UW - OFAC / Black List Review Require		QC Analyst	Overdue	03/03/2021
7030830	MN BK Capital, LLC	Commercial - Assignment Request	AlvesteT	Shipper Manag	Overdue	03/15/2021

But you can easily place them in Alphabetical order by simply clicking on a specific column, whether you like it to be by **Filename**, **Borrower Description**, **Assigned to and/or Assigned Role etc**. In this example we will do it by Assigned to. (Please see Below)

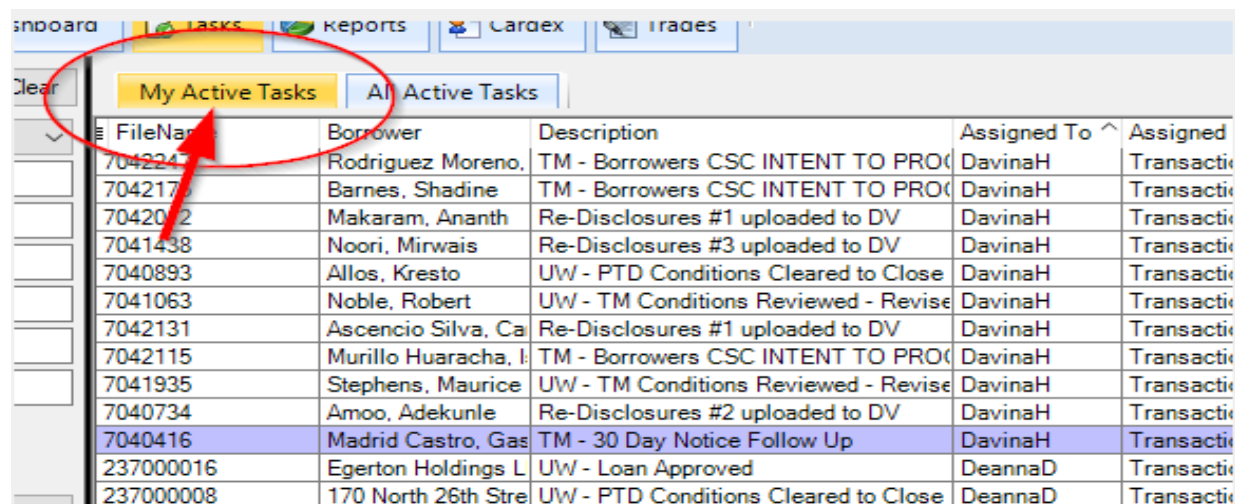


FileName	Borrower	Description	Assigned To ^	Assigned Role	Status	Due
7040812	Russell, Bruce	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Due Today	06/02/2022
7040613	Allen, Elaine	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Overdue	05/25/2022
7041671	Lara, Jesus	Doc Drawer - DRY - Signed Docs Back	AGoodman	Closer	Overdue	05/24/2022
7041395	Gonzalez, Sebastia	Funder - WET- Funding Task	AGoodman	Closer	Overdue	05/23/2022
7041395	Gonzalez, Sebastia	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/20/2022
7041671	Lara, Jesus	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/20/2022
7041671	Lara, Jesus	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Overdue	05/20/2022
7041626	Mojica, Maurilio	Funder - WET- Funding Task	AGoodman	Closer	Overdue	05/20/2022
7041626	Mojica, Maurilio	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/19/2022

As you can see the system has now placed all tasks in Alphabetical Order by Assigned to.

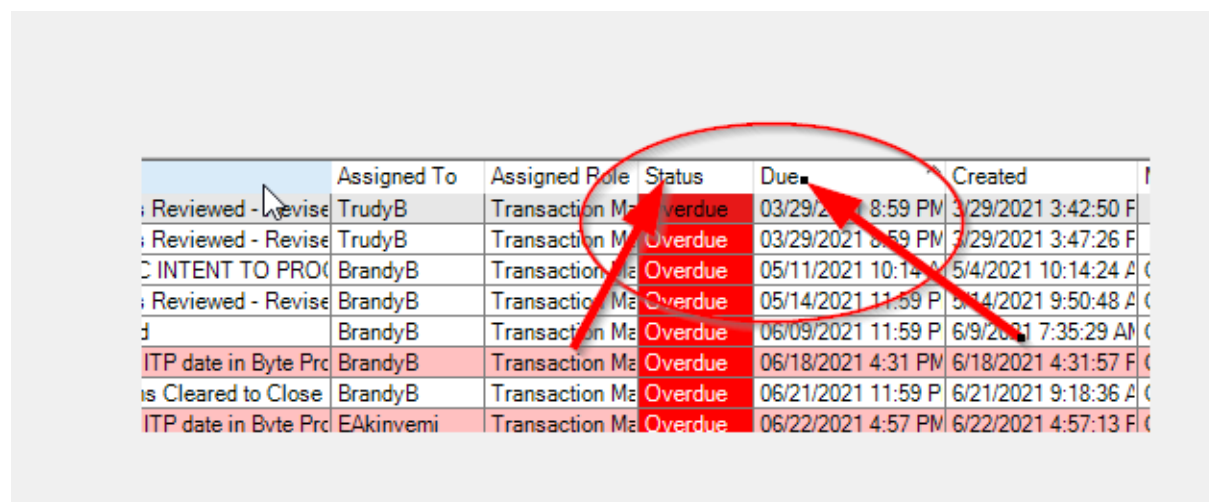
Now you can simply scroll down to your name and find the specific tasks assigned to you.

Second Method: is simply clicking on the My Active Tasks the system will generate the tasks your currently have open that have been assigned to you. (Shown below)



File Name	Borrower	Description	Assigned To	Assigned
704224	Rodriguez Moreno,	TM - Borrowers CSC INTENT TO PRO	DavinaH	Transacti
704217	Barnes, Shadine	TM - Borrowers CSC INTENT TO PRO	DavinaH	Transacti
704202	Makaram, Ananth	Re-Disclosures #1 uploaded to DV	DavinaH	Transacti
7041438	Noori, Mirwais	Re-Disclosures #3 uploaded to DV	DavinaH	Transacti
7040893	Allos, Kresto	UW - PTD Conditions Cleared to Close	DavinaH	Transacti
7041063	Noble, Robert	UW - TM Conditions Reviewed - Revise	DavinaH	Transacti
7042131	Ascencio Silva, Ca	Re-Disclosures #1 uploaded to DV	DavinaH	Transacti
7042115	Murillo Huaracha, I	TM - Borrowers CSC INTENT TO PRO	DavinaH	Transacti
7041935	Stephens, Maurice	UW - TM Conditions Reviewed - Revise	DavinaH	Transacti
7040734	Amoo, Adekunle	Re-Disclosures #2 uploaded to DV	DavinaH	Transacti
7040416	Madrid Castro, Gas	TM - 30 Day Notice Follow Up	DavinaH	Transacti
237000016	Egerton Holdings L	UW - Loan Approved	DeannaD	Transacti
237000008	170 North 26th Stre	UW - PTD Conditions Cleared to Close	DeannaD	Transacti

From here you can simply look at the different columns on the top and determine how you would like to address your loans. For example: would you like to work the loans by Status, Due Date and/or specifications. I can click on the Due Date then click on the Status now the system will show me the **Overdue Status by Due Date**. (See below)



	Assigned To	Assigned Role	Status	Due	Created
Reviewed - Revise	TrudyB	Transaction Ma	Overdue	03/29/2021 8:59 PM	3/29/2021 3:42:50 F
Reviewed - Revise	TrudyB	Transaction Ma	Overdue	03/29/2021 8:59 PM	3/29/2021 3:47:26 F
C INTENT TO PRO	BrandyB	Transaction Ma	Overdue	05/11/2021 10:14 AM	5/4/2021 10:14:24 A
Reviewed - Revise	BrandyB	Transaction Ma	Overdue	05/14/2021 11:59 P	5/14/2021 9:50:48 A
d	BrandyB	Transaction Ma	Overdue	06/09/2021 11:59 P	6/9/2021 7:35:29 AM
ITP date in Byte Pro	BrandyB	Transaction Ma	Overdue	06/18/2021 4:31 PM	6/18/2021 4:31:57 F
is Cleared to Close	BrandyB	Transaction Ma	Overdue	06/21/2021 11:59 P	6/21/2021 9:18:36 A
ITP date in Byte Pro	Eakinveni	Transaction Ma	Overdue	06/22/2021 4:57 PM	6/22/2021 4:57:13 F

Allowing to Prioritize my Status by urgency and age.

Once you have established your work flow you can now start working on completing your aged tasks. You simply have to click on a specific loan.

My Active Tasks		All Active Tasks					
FileName	Borrower	Description	Assigned To	Assigned Role	Status	Due	
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Conditions Reviewed - Revis	TrudyB	Transaction Ma	Overdue	03/29/202	
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Conditions Reviewed - Revis	TrudyB	Transaction Ma	Overdue	03/29/202	
5002727	Brady, Larry	TM - Borrowers CSC INTENT TO PRO	BrandyB	Transaction Ma	Overdue	05/11/202	
5002725	Kemp, Perry	UW - TM Conditions Reviewed - Revis	BrandyB	Transaction Ma	Overdue	05/14/202	
5002795	Silva, Clayton	UW - Loan Approved	BrandyB	Transaction Ma	Overdue	06/09/202	
5002837	Tseng, Kieran	Review DV; Update ITP date in Byte Pro	BrandyB	Transaction Ma	Overdue	06/18/202	
5002779	Cottone, Gaetano	UW - PTD Conditions Cleared to Close	BrandyB	Transaction Ma	Overdue	06/21/202	
5002846	Liao, Ivanka	Review DV; Update ITP date in Byte Pro	EAkinyemi	Transaction Ma	Overdue	06/22/202	
5002844	Neves, Daniel	Review DV; Update ITP date in Byte Pro	EAkinyemi	Transaction Ma	Overdue	06/23/202	
5002774	Magee, Robert	UW - Loan Declined	BrandyB	Transaction Ma	Overdue	06/23/202	
5002772	Dreibelbis, Edward	UW - Loan Approved	BrandyB	Transaction Ma	Overdue	06/24/202	
5002736	Magill, Julia	UW - TM Conditions Reviewed - Revis	BrandyB	Transaction Ma	Overdue	06/25/202	

The system will take you to that specific loan. In the task/s menu and you can address the specific tasks assigned to you. By simply clicking on the specific task.

My Active Tasks

All Active Tasks

My Active And Completed Tasks

All Active And Completed Tasks

Description	Assigned To	Assigned Role	Status	Due	Completed	Completed By	Created	Visible To
Review DV; Update ITP date in Byt...	BrandyB	Transaction ...	Overdue	06/18/2021 4:31 PM	<input type="checkbox"/>		06/18/2021	Transaction Manager, Assistant TM, ...
TM - Borrowers CSC INTENT TO P...	BrandyB	Transaction ...	Overdue	07/06/2021 10:44 AM	<input type="checkbox"/>		06/28/2021	Transaction Manager, TM Supervisor,...
UW - Loan suspended	BrandyB	Transaction ...	Overdue	07/08/2021 11:59 PM	<input type="checkbox"/>		07/08/2021	Loan Processor, Transaction Manage...
TM File must be back in UW for initi...	BrandyB	Transaction ...	Overdue	07/22/2021 11:59 PM	<input type="checkbox"/>		07/08/2021	Transaction Manager, TM Supervisor,...

The system will then open the Edit Task box. From here you can complete make a note, send a notification when it has been complete. (See below) the system will also provide all the details of the Task.

The screenshot shows the 'Edit Task' dialog box with the following details:

- Mark as Completed:** A button at the top left, circled in red with an arrow pointing to it.
- General Info:**
 - Description: Review DV; Update ITP date in Byte Pro; Notify broker ITP rec
 - Assigned To: Transaction Manager (dropdown), E-Mail (button)
 - Due Date: 06/18/2021 4:31 PM (calendar icon)
 - Security: High - Only Task Creator Can Modify (dropdown)
 - Visible To: All (selected), None (button)
 - Task Priority: High (dropdown)
- Notifications When Complete:**
 - ☐ Send Notifications When Complete (checkbox circled in red with an arrow pointing to it)
- Status:**
 - Status: Overdue (348 days, 20 hours overdue) (highlighted in red)
 - Created: 06/18/2021 4:31 PM by AngelicaP (role = None)
 - Completed:
 - Elapsed Time: 348 days, 20 hours
- Edit Notes:** A button at the bottom left, circled in red with an arrow pointing to it.
- Buttons:** OK and Cancel at the bottom right.

Note: Adding notes in the note section it will not transfer over to the General Note section in the loan. **This is simply for your record within in the Tasks itself.**

The screenshot shows a task management interface. The task is titled "UW - TM Conditions Reviewed - Revised Approval". It is assigned to "Transaction Manager" with a due date of "06/02/2022 11:59 PM". The security is set to "High - Only Task Creator Can Modify". The task priority is "Medium". The status is "Due Today (due in 10 hours, 42 minutes)". The task was created on "06/02/2022 1:13 PM" by "Sergio L. (Transaction M...)". The elapsed time is "3 minutes".

On the right side, there are checkboxes for "Send Notifications When Complete" and a list of roles: AE, DP, UW, FUND, AF, UWS, TM, DS, DOC, CLSR, FMNG, VET, JTM, ATM, DOC2, CSS, Lock, LOM. Below this, there are checkboxes for "Borrower", "Appraiser", "Title Company", "Escrow Company", "Listing Agent", "Selling Agent", and "Settlement Company".

At the bottom, there is an "Edit Notes" section. A red circle highlights a note: "< Sergio Loza : 6/02/2022 1:16 PM > Assigned to UW Test Sample". A red arrow points to this note. The "OK" and "Cancel" buttons are at the bottom right.

As you can see, I made a note in the Edit Tasks section but it didn't transfer over to the General Note section on the production side.

The screenshot shows a conversation log table. The table has three columns: "Date/Time", "Talked To", and "Notes". A red circle highlights a row with the date "05/21/2021 1:53 PM" and the note "< Lina Silva : 5/21/2021 1:58 PM PDT > Prelim - Settlement Agent to provide an updated Preliminary Report issued within the last 30 days." A red arrow points to this row.

Date/Time	Talked To	Notes
05/23/2016 11:32 AM		< Perla Varela : 5/23/2016 11:32 AM PDT > FILE SUBMITTED. EMAILED WELCOME LETTER. SECTION 16 REQUIRED
05/24/2016 3:36 PM		< William Dennis : 5/24/2016 3:36 PM PDT > Initial Disclosures Emailed
05/24/2016 4:17 PM		< Sandra G. Finley : 5/24/2016 4:17 PM PDT > File assigned to CL to UW
05/26/2016 6:56 PM		< Cindy CL Le : 5/26/2016 6:56 PM PDT > u/w was submitted. 70% ltv/cltv. purchase. sale price \$1147500. appraisal \$1248000. 24 mos business bank stmnt. 795 fico. A grade. discrepancy in city name for subject Pincrest, Miami, Coral Gables. file to uw supervisor for 2nd sign.
05/27/2016 10:36 AM		< Rodney RH Hixon : 5/27/2016 10:36 AM PDT > File to TM after being 2nd signed.
02/12/2019 5:54 PM	ITP	< Kimberla Talley : 2/12/2019 5:54 PM PST > ITP resolved
05/21/2021 1:47 PM		
05/21/2021 1:53 PM	Cond 7104	< Lina Silva : 5/21/2021 1:58 PM PDT > Prelim - Settlement Agent to provide an updated Preliminary Report issued within the last 30 days.

Once you click on the Mark as Completed the system will then complete the task and mark in green as shown here.

Edit Task

General Info

Description: UW - TM Conditions Reviewed - Revised Approval

Assigned To: Transaction Manager

Due Date: 06/02/2022 11:59 PM

Security: High - Only Task Creator Can Modify

Visible To: ☒ AE ☐ DP ☒ UW ☐ FUND ☐ AF ☒ UWS ☒ TM ☐ DS ☐ DOC ☐ CLSR ☐ FMNG ☐ VET ☒ JTM ☐ ATM ☐ DOC2 ☐ CSS ☐ Lock ☐ LOM

Task Priority: Medium

Notifications When Complete

☒ Send Notifications When Complete

☒ AE ☐ DP ☐ UW ☐ FUND ☐ AF ☐ UWS ☐ TM ☐ DS ☐ DOC ☐ CLSR ☐ FMNG ☐ VET ☐ JTM ☐ ATM ☐ DOC2 ☐ CSS ☐ Lock ☐ LOM

Other E-Mails

☐ Borrower ☐ Listing Agent ☐ Appraiser ☐ Selling Agent ☐ Title Company ☐ Settlement Company ☐ Escrow Company

Status

Status: Complete (10 hours, 36 minutes before due)

Created: 06/02/2022 1:13 PM by SergioL (Transaction M...)

Completed: 06/02/2022 1:22 PM by SergioL

Elapsed Time: 9 minutes

Edit Notes

< Sergio Loza : 6/02/2022 1:16 PM >
Assigned to UW Test Sample

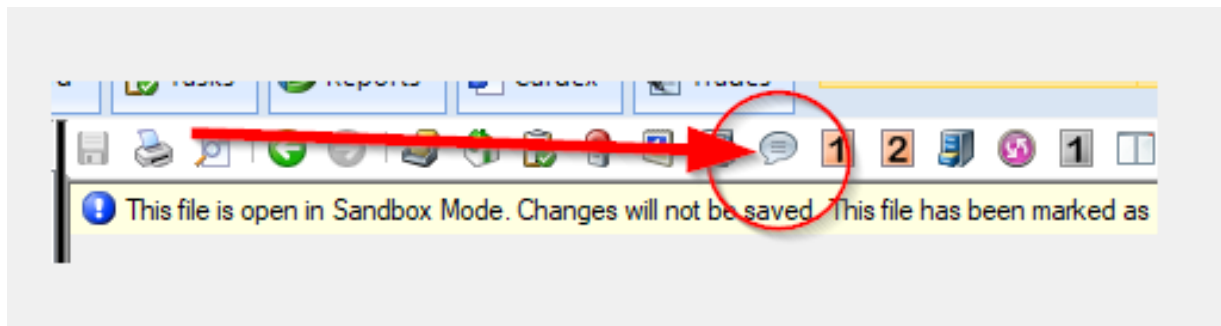
OK Cancel

Once you have closed the window it will reflect the Complete status in the All-Active Tasks.

My Active Tasks All Active Tasks My Active And Completed Tasks All Active And Completed Tasks

Description	Assigned To	Assigned Role	Status	Due	Completed	Completed By	Created	Visible To
UW - TM Conditions Reviewed - Re...	Transaction Manager	Transaction Manager	Complete	06/02/2022 11:59 PM	06/02/2022	<input type="checkbox"/> SergioL	06/02/2022	Loan Processor, Transaction Manage...
TM - Appraisal Task	Assistant TM	Assistant TM	Active	06/06/2022 11:59 PM		<input type="checkbox"/>	06/02/2022	Loan Processor, Transaction Manage...

You can the move on to Notating the loan accordingly. By simply clicking on the conversation icon.



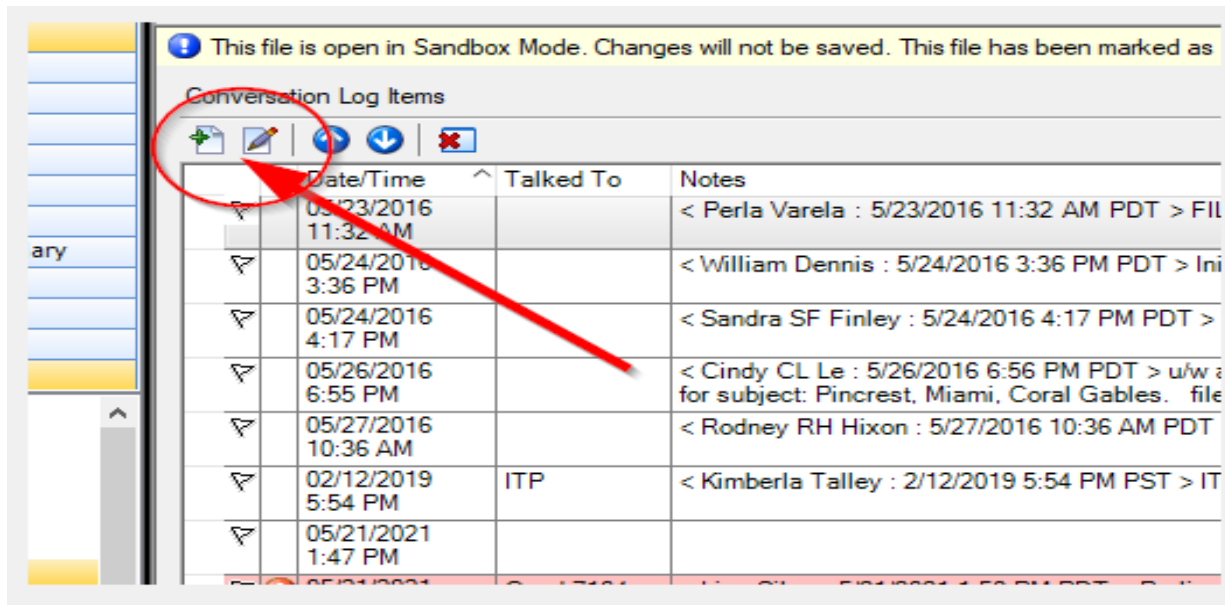
The system will then open the conversation log.

This file is open in Sandbox Mode. Changes will not be saved. This file has been marked as 'excluded from custom reports'.

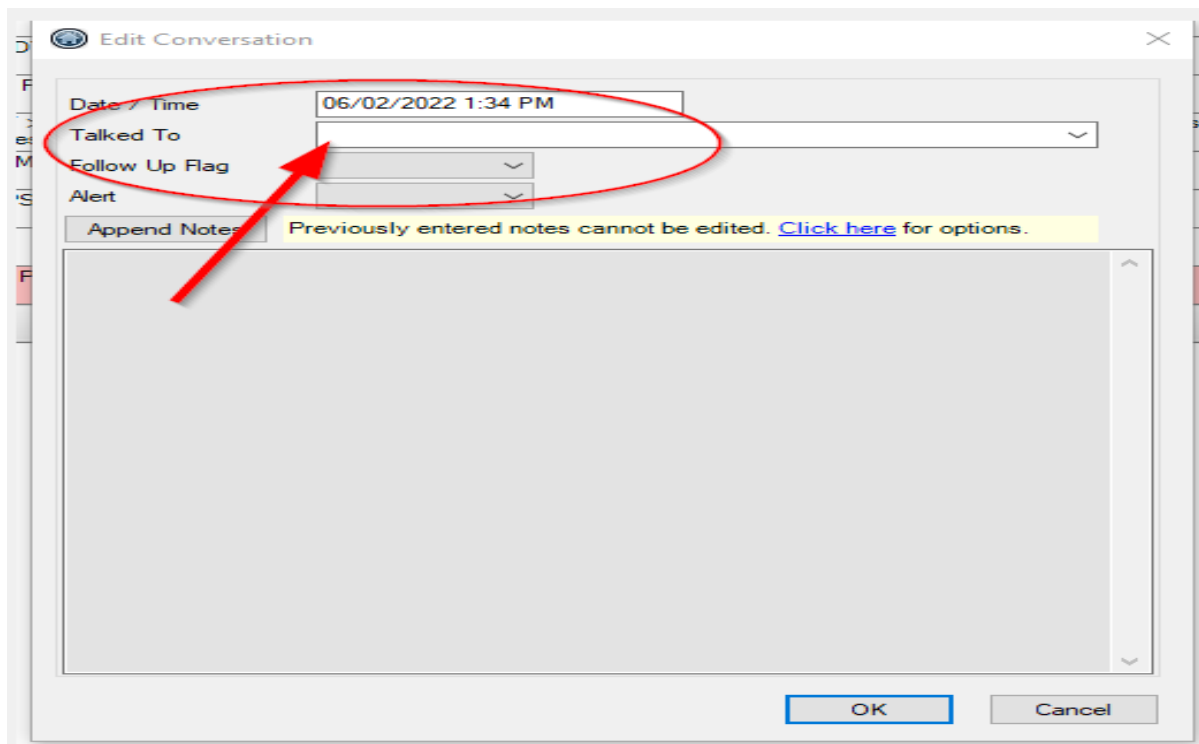
Conversation Log Items

	Date/Time	Talked To	Notes
	05/23/2016 11:32 AM		< Perla Varela : 5/23/2016 11:32 AM PDT > FILE SUBMITTED. EMAILED WELCOME LETTER. SECTION 16 REQUIRED
	05/24/2016 3:36 PM		< William Dennis : 5/24/2016 3:36 PM PDT > Initial Disclosures Emailed
	05/24/2016 4:17 PM		< Sandra SF Finley : 5/24/2016 4:17 PM PDT > File assigned to CL to UW
	05/26/2016 6:55 PM		< Cindy CL Le : 5/26/2016 6:56 PM PDT > u/w as submitted. 70% ltv/cltv. purchase. sale price \$1147500. appraisal \$1248000. 24 mos business bank stmt. 795 fico. A grade. discrepancy in city name for subject: Pincrest, Miami, Coral Gables. file to uw supervisor for 2nd sign.
	05/27/2016 10:36 AM		< Rodney RH Hixon : 5/27/2016 10:36 AM PDT > File to TM after being 2nd signed.
	02/12/2019 5:54 PM	ITP	< Kimberla Talley : 2/12/2019 5:54 PM PST > ITP received
	05/21/2021 1:47 PM		
	05/21/2021 1:53 PM	Cond 7104	< Lina Silva : 5/21/2021 1:58 PM PDT > Prelim - Settlement Agent to provide an updated Preliminary Report issued within the last 30 days.

You click on the **Add note** on the **Top Left**.



Fill in the necessary format on the Talked to: Section.



Click on Append Note tab.

T > FILE SUBMITTED. EMAILED WELCOME LETTER. SECTION 16 REQUIRED

Edit Conversation

Date / Time: 06/02/2022 1:36 PM

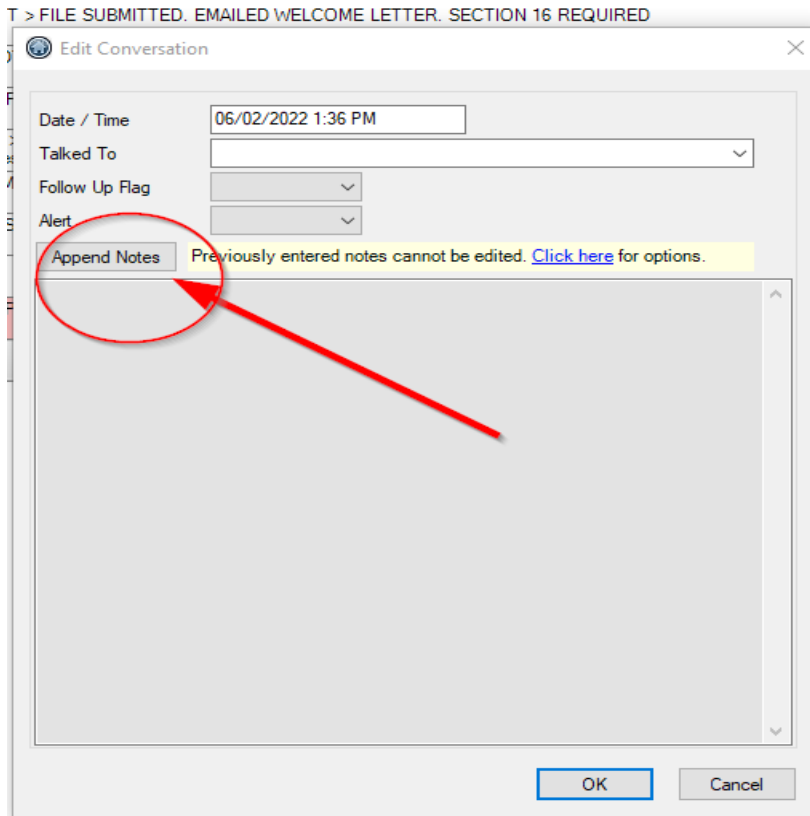
Talked To: [Dropdown]

Follow Up Flag: [Dropdown]

Alert: [Dropdown]

Append Notes: Previously entered notes cannot be edited. [Click here](#) for options.

OK Cancel

The image is a screenshot of a software window titled "Edit Conversation". At the top, there is a breadcrumb trail: "T > FILE SUBMITTED. EMAILED WELCOME LETTER. SECTION 16 REQUIRED". Below this, the window has a header bar with a gear icon and the text "Edit Conversation". The main content area is divided into several sections. The first section contains four fields: "Date / Time" with the value "06/02/2022 1:36 PM", "Talked To" with a dropdown arrow, "Follow Up Flag" with a dropdown arrow, and "Alert" with a dropdown arrow. Below these fields is a tabbed interface. The "Append Notes" tab is selected and highlighted with a red circle. A red arrow points from the "Append Notes" tab to the text "Previously entered notes cannot be edited. Click here for options." which is displayed in a yellow background. At the bottom of the window, there are two buttons: "OK" and "Cancel".

Document your loan accordingly. (Click ok)

Edit Conversation

Date / Time: 06/02/2022 1:36 PM

Talked To: Cond #4009

Follow Up Flag: [v]

Alert: [v]

Append Notes: Previously entered notes cannot be edited. [Click here](#) for options.

New Notes To Be Appended | Previously Entered Notes

Received information from the borrower regarding the approval submitted to UW for Approval.

OK Cancel

Confirm documentation has been recorded and move on to the next loan.

✓	05/24/2016 4:17 PM		< Sandra St. Hiley : 5/24/2016 4:17 PM PDT > File assigned to CL to UW
✓	05/26/2016 6:55 PM		< Cindy CL Le : 5/26/2016 6:55 PM PDT > ulw as submitted. 70% ltv/cltv. purchase. sale price \$1147500. appraisal \$1248000. 24 mos business bank stmt. 795 fico. A grade. discrepancy in city name for subject: Pincrest, Miami, Coral Gables. file to uw supervisor for 2nd sign.
✓	05/27/2016 10:36 AM		< Rodney RH Hixon : 5/27/2016 10:36 AM PDT > File to TM after being 2nd signed.
✓	02/12/2019 5:54 PM	ITP	< Kimberla Talley : 2/12/2019 5:54 PM PST > ITP received
✓	05/21/2021 1:47 PM		
✓	05/21/2021 1:53 PM	Cond 7104	< Lina Silva : 5/21/2021 1:58 PM PDT > Prelim - Settlement Agent to provide an updated Preliminary Report issued within the last 30 days.
✓	06/02/2022 1:36 PM	Cond #4009	< Sergio Loza : 6/2/2022 1:39 PM PDT > Received information from the borrower regarding the approval submitted to UW for Approval.