




BOX Guide

9/3/2019



Creating a BOX Folder

- Once the Loan has been submitted, welcome letter has been sent out you will need to direct to BOX. Under 'TM – Files In Process' folder look for the TM assigned to the file

All Files ▾	
Name	Updated ▾
 Set Up	 Today by Vincent Bury
 TM - Files In Process	Today by Tom Esposito

All Files > ★ TM - Files In Process

Name ^	Updated
 Andrea Olson Personal	Yesterday by Andrea Olson



Creating a BOX Folder

- Click on the TM's link to enter the sub folders
- On the right-hand corner you will see a button labeled 'New'
- Drop down menu will come up, you will need to select 'Folder'

All Files > TM - Files In Process > ☆ Andrea Olson Personal

1 of 5



Name ^

Updated

Size



Sharing

Details



7021698 Mitchell

Jul 10, 2019 by Andrea Olson

39 Files



Kyle Gunderlock
Owner



Creating a BOX Folder

- A window will pop up, it will require you to enter a folder name, collaborator to invite & assign the permission
 - Folder name will be the Loan Number with the borrower's last name
 - Invitation will need to go ONLY to the AE
 - Permission needs to be set as 'Previewer'
 - Once complete, review the information entered & click 'Create'

Create a New Folder

Folder Name

7023715 Roberts

Invite People

Shared with KG II TB +12

Josh Schneiderman x

Permission

Previewer [Learn More](#)

Cancel Create

Yesterday by Andrea Olson