

AE File Reassignment

(Effective 11/01/19)

Only authorized users may re-assign files. Direction to reassign files will be given by the Transactions & Intake Manager or the Director of Operations. Users are NOT permitted to make any file re-assignments at the request of any Account Executives, Transaction Managers, or Sales Management, etc.

To ensure that an AE can view the loan in their pipeline, it is critical that the correct Organization is selected at the time of loan set up. If there was an error made at the time of loan set up or an authorized reassignment is being requested, please follow the steps below:

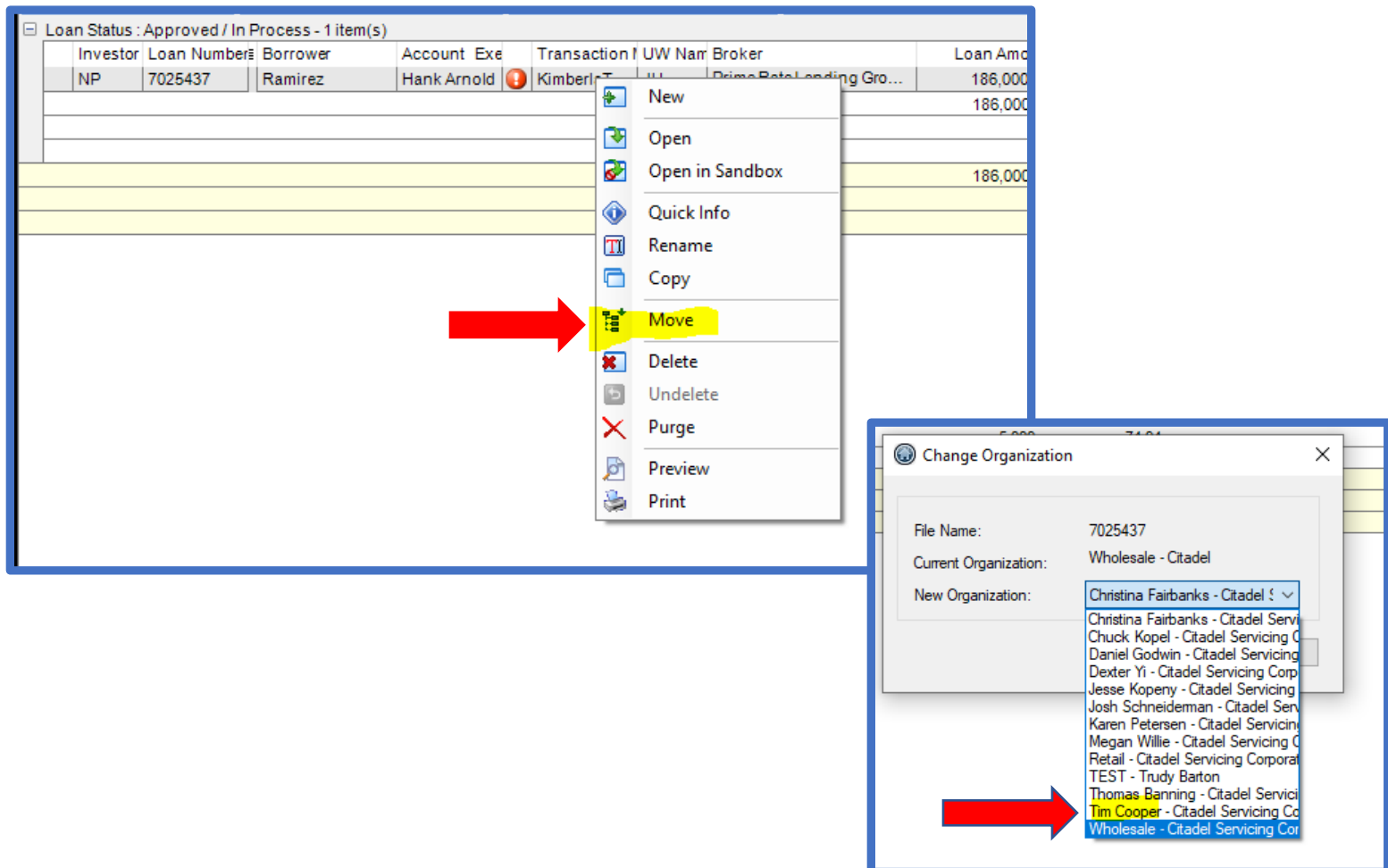
Reassigning files are done via the pipeline CSC Master Report.

- Locate the file in the CSC Master Report in Pipeline view
- Once the file is displayed, right click and hit "Move". From here, you will need to assign to the New Organization ("Tim Cooper" in the example below).
- Open the file in Byte Pro and select the new assigned AE in the "File Assignments" section in the Home Screen.

REMINDER:

To complete the file reassignment, you will also need to move the loan file to the AE's "folder" in Doc Velocity (DV) AND remove the prior AE from the BOX folder; send a new invite to the reassigned AE, allowing access to the BOX folder.

BYTE PRO – CSC MASTER REPORT



The screenshot displays the 'Loan Status : Approved / In Process - 1 item(s)' table in the Byte Pro - CSC Master Report. The table has columns: Investor, Loan Number, Borrower, Account Executive, Transaction ID, U/W Name, Broker, and Loan Amount. The first row shows: NP, 7025437, Ramirez, Hank Arnold, Kimberl... (with a red error icon), Prime Rate Lending Gro..., and 186,000. A right-click context menu is open over the first row, with the 'Move' option highlighted in yellow. A red arrow points to the 'Move' option. Below the main window, a 'Change Organization' dialog box is shown. It has fields for 'File Name:' (7025437), 'Current Organization:' (Wholesale - Citadel), and 'New Organization:'. The 'New Organization' dropdown is open, showing a list of organizations. 'Tim Cooper - Citadel Servicing Co' is highlighted in blue. A red arrow points to 'Tim Cooper'.

Investor	Loan Number	Borrower	Account Executive	Transaction ID	U/W Name	Broker	Loan Amount
NP	7025437	Ramirez	Hank Arnold	Kimberl...	Prime Rate Lending Gro...		186,000

Change Organization

File Name: 7025437
 Current Organization: Wholesale - Citadel
 New Organization: Christina Fairbanks - Citadel Servicing Co

Christina Fairbanks - Citadel Servicing Co
 Chuck Kopel - Citadel Servicing Co
 Daniel Godwin - Citadel Servicing Co
 Dexter Yi - Citadel Servicing Corp
 Jesse Koperly - Citadel Servicing Co
 Josh Schneideman - Citadel Servicing Co
 Karen Petersen - Citadel Servicing Co
 Megan Willie - Citadel Servicing Co
 Retail - Citadel Servicing Corporation
 TEST - Trudy Barton
 Thomas Banning - Citadel Servicing Co
Tim Cooper - Citadel Servicing Co
 Wholesale - Citadel Servicing Co

BYTE PRO – HOME SCREEN

FILE ASSIGNMENTS				
Account Executive	TimothyC	Loan Officer Manager	[Not Assigned]	
Transaction Manager	KimberlaT	Loan Officer	[Not Assigned]	
JR Transaction Manager	VenitaM	JR Loan Officer	[Not Assigned]	
Disclosure Processor	JoseQ	Loan Processor	[Not Assigned]	

DOC VELOCITY

Choose Office and Cabinet to Open - DocVelocity Desktop 20.1

Choose Office and Cabinet to Open

16 offices

Search for offices

Office Name
07 - Post-Closing/Shipping
06 - Funding/Closing
05 - Underwriting
04 - Disclosures
03 - Transaction Managers
02 - Set-Up
01 - Sales
00 - Dan Perl

174 Cabinets in Office '01 - Sales'

Search for cabinets

Cabinet Name	# of Folders	Description
Teddy Corral	42	
Theresa Knopp	29	
Thomas Banning	195	
Thomas Skouros	28	
Tiffany Colf	0	
Timothy Cooper	168	
Todd Ceman	20	
Tony Guidicessi	182	

Alerts

Open

Cancel

Office	Cabinet	Moved Into Cabinet
01 - Sales	Timothy Cooper	Nov 1, 2019, 08:34 AM