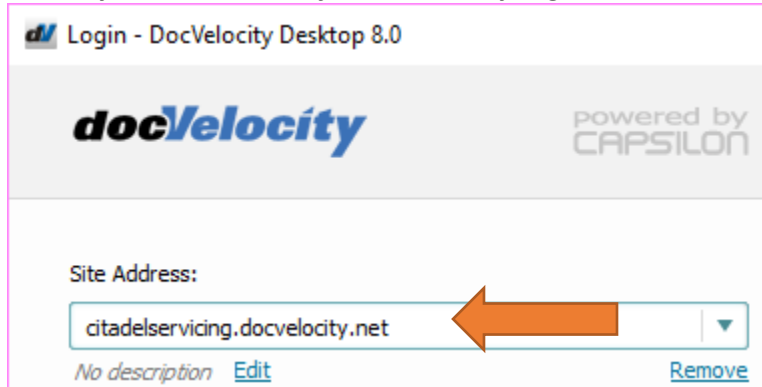# CITADEL
SERVICING CORPORATION

## Transaction Manager ON-BOARDING – DAY ONE
*(revised 10/01/18)*

1) **Log In to Byte Pro to confirm user name/password are activated**

2) **Log In to DOC VELOCITY (DV) and STORE USER NAME/PASSWORD**
   ***Check your email INBOX for Doc Velocity Log In link**

   **docVelocity** powered by **CAPSILON**
   Login - DocVelocity Desktop 8.0

   Site Address:
   citadelservicing.docvelocity.net

   *No description*   Edit                    Remove

3) **Log into BOX via web brower**
4) *Locate BOX SYNC and login on desktop (same user name/password)*

   box
   Box Sync
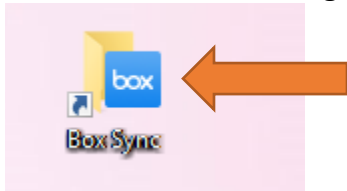
5) **Log In to Proteck, Service Link and Consolidated Analytics to confirm you have access to order BPO inspections** *(contact Almog Priyov-Hurst and Alan Senda if you have not received your account credentials by the end of the business day)*

6) **Set up SCREEN SHORT CUTS in BYTE PRO**

   - Home Screen
   - Conversation Log
   - Tasks
   - Parties
   - Status
   - Stored Documents
   - Transaction Manager Screen
   - ECOA Valuations Rule Screen
   - Underwriter Info Screen (Underwriter's Loan Analysis Screen)
   - CSC Funding Screen
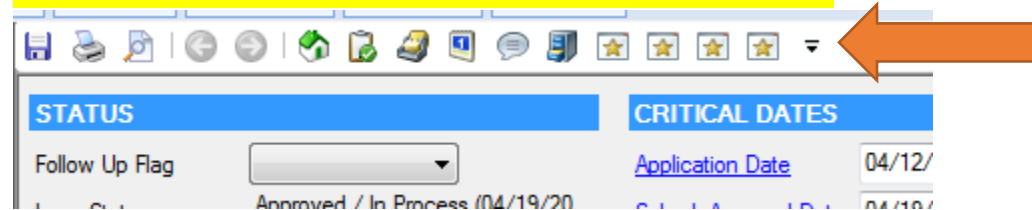
7) **Set up Transaction Manager EMAIL signature**
8) **Set up VOICEMAIL**

9) **Set up email TEMPLATES for**
- NEW LOAN APPROVAL
- REVISED LOAN APPROVAL
- SUSPENSE NOTICE
- DENIAL NOTICE
- EARLY CD REQUESTED
- READY FOR DOCS (TRID)
- READU FOR DOCS (NON-TRID)
- DOCS OUT (DRY STATES)
- DOCS OUT (WET STATES)
- POA REQUIRED ITEMS
- IN HOUSE VETTING REQUIRED ITEMS
- CSC LOSS PAYEE CLAUSE
- CONDITION DELIVERY REMINDER

10) EMAIL Michael Petersen at mpetersen@citadelservicing.com or Kyle Miller at kmiller@citadelservicing.com and request that they create your TM Pipeline Reports in Byte Pro.