BOX Guide

9/3/2019



Creating a BOX Folder

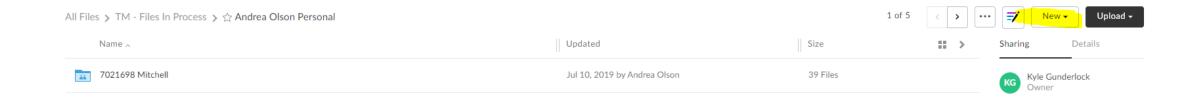
 Once the Loan has been submitted, welcome letter has been sent out you will need to direct to BOX. Under 'TM – Files In Process' folder look for the TM assigned to the file

	All Files *	
	Name	Updated \vee
	Set Up	
	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'





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'

