

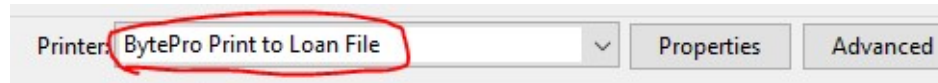
Sending Appraisal & AVM to borrower

(how to set password for PDF attachment to email)

You must have Byte and DV open for this task.

DV screen:

1. Open DV and locate Appraisal report
 - a. Select Appraisal
 - b. Right click >> Open in PDF
2. Once PDF of appraisal report popped up
 - a. Right click >> Print option *"BytePro Print to Loan File"*
 - i. (Loan file must be opened in Byte for this to work)



BytePro Screen:

Once file has been "printed" to Byte, you will see a screen popup

Select *"Store New Documents"* at the bottom right of the screen

3. Open doc cabinet icon



4. Select Appraisal >> Print (using print icon)
5. Select Email to send email to borrower
 - a. Selecting borrower's email
 - i. If there are 2 borrowers, include both emails
6. Selecting your processor's and LO's emails
7. Rename doc to "Appraisal"
8. Choose option to "encrypt password"
9. Encrypt with password CitadelXXXX (X being borrower's last 4 SSN)
 - a. If there are 2 borrowers on the loan, just use borrower #1's SSN)

Continue to next page...

Outlook Screen:

10. This will autogenerate an email popup from Outlook
11. Your new email will have all emails addresses you have selected including the appraisal as a PDF attachment.
12. Correct email subject to: Appraisal & AVM – borrower's last name & loan #
 - a. Example: Appraisal & AVM -Van 5023456
13. Must include appraisal verbiage
14. Do the same for AVM – starting with DV and print to PDF then Byte to email
 - a. Make sure AVM is named "AVM" before generate email
15. Include a blank ECOA form
16. Sent all attachments in one email (must be separate attachments but same email)
17. Print record of your sent email and upload to DV
 - a. Rename *"Appraisal Transmittal to Borrower"*
18. When borrower reply to acknowledge the email
 - a. Print the email and upload to DV
 - b. Rename *"Borrower's Appraisal Delivery Confirmation"*

Try open PDF attachment using password you have set before sending to make sure it works.

Always include the Processor and LO on any email communication to the borrower.