

How to assign Loan Number to file

1. Open excel file called **Loan Number Audit – RETAIL** from H:\ Drive
 - Input borrower's last name next to the available number
 - Input loan amount (it's ok if loan amount changed later)
 - Save excel file before exiting

5003439	5003439	CSC	Borrower's Last Name	Loan amount
5003440	5003440	CSC		
5003441	5003441	CSC		
5003442	5003442	CSC		
5003443	5003443	CSC		

2. Ellie Mae AIQ:

- Locate file: search for file using Folder ID (most often referred to as FX number)

Site Navigator for Citadel Servicing Corporation (citadelservicing.docvelocity.net)

Search All Folders

1 folder matches 'FX2203666'

Search Folders:

Folder ID	Loan Number	Borrower First Name	Borrower Last Name
FX2203666	Caitak_Doris	Doris	Caitak

- Open the file once you have located it using FX number
- Select **More** from the top and hit **Edit** to assign loan number to file

FX2203666 • Caitak_Doris • Doris Caitak • \$162,500.00

- Input loan # (previously set from the Loan Number Audit file) on the edit box and Processor's name
- Save

Edit Folder Properties

LOAN DETAILS

Loan Number:

Borrower First Name:

Borrower Last Name:

Lien Position:

Processor:

Loan Amount:

Program:

PROPERTY DETAILS

Property Street:

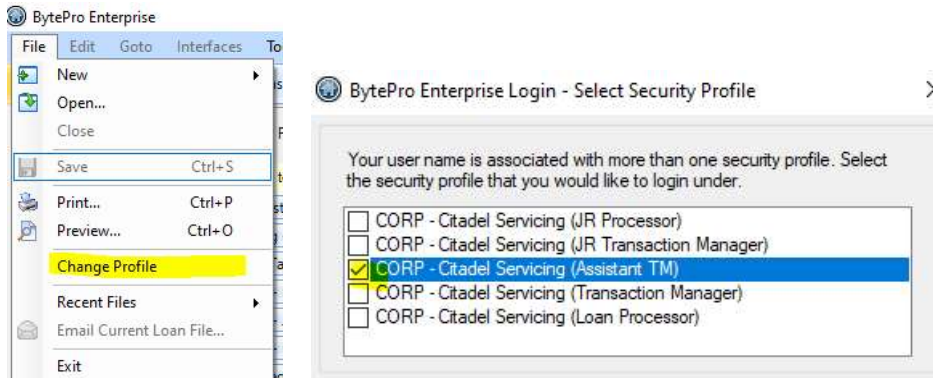
Property City:

Property County:

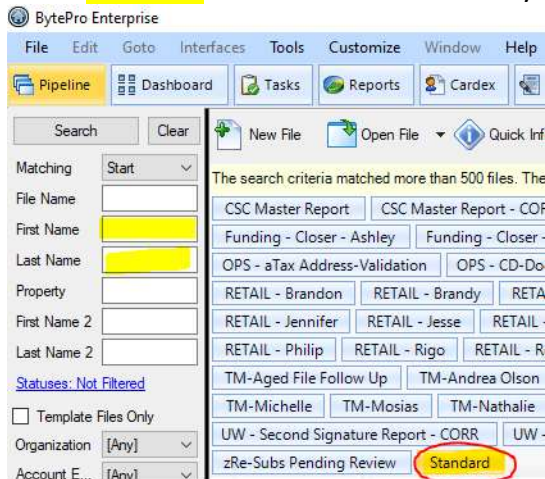
Acra Lending

3. BytePro:

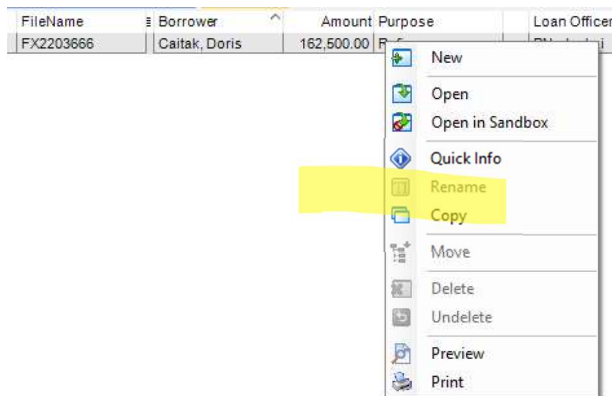
- Make sure your Profile is set under Assistant TM
- To verify – Go to File > Change Profile > Set to **Assistant TM** if you're not already



- Go to **Standard** tab and search for file by inputting Borrower's name



- Once you locate the file:
 - Right click over file and select **Rename** and rename it to loan # you have previously set



You have successfully located and named the files!
See next page on **How to Order Disclosure**