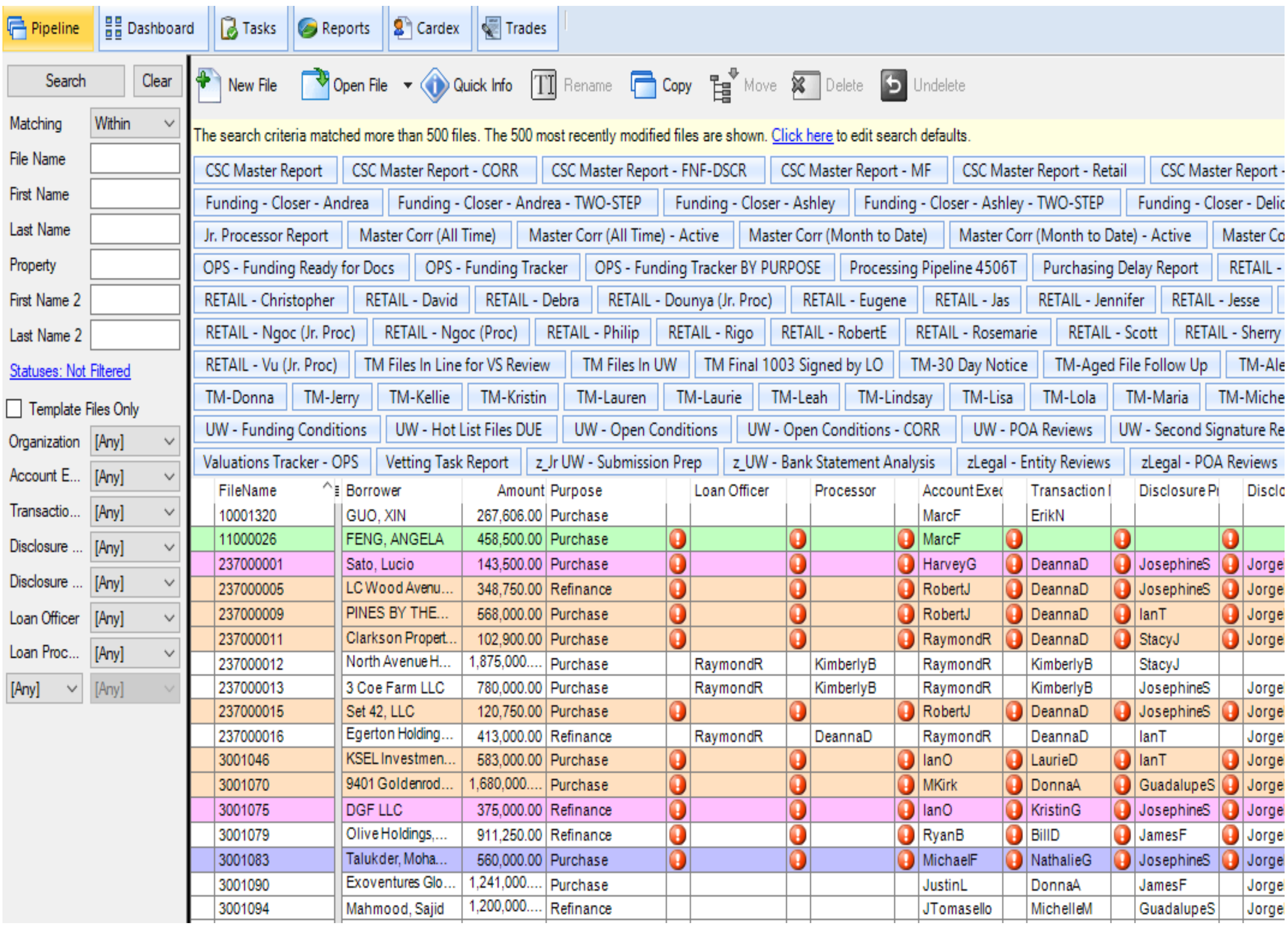
User Guide for Creating and Editing Tasks in Bytepro

Acra
LENDING
LEARNING & DEVELOPMENT

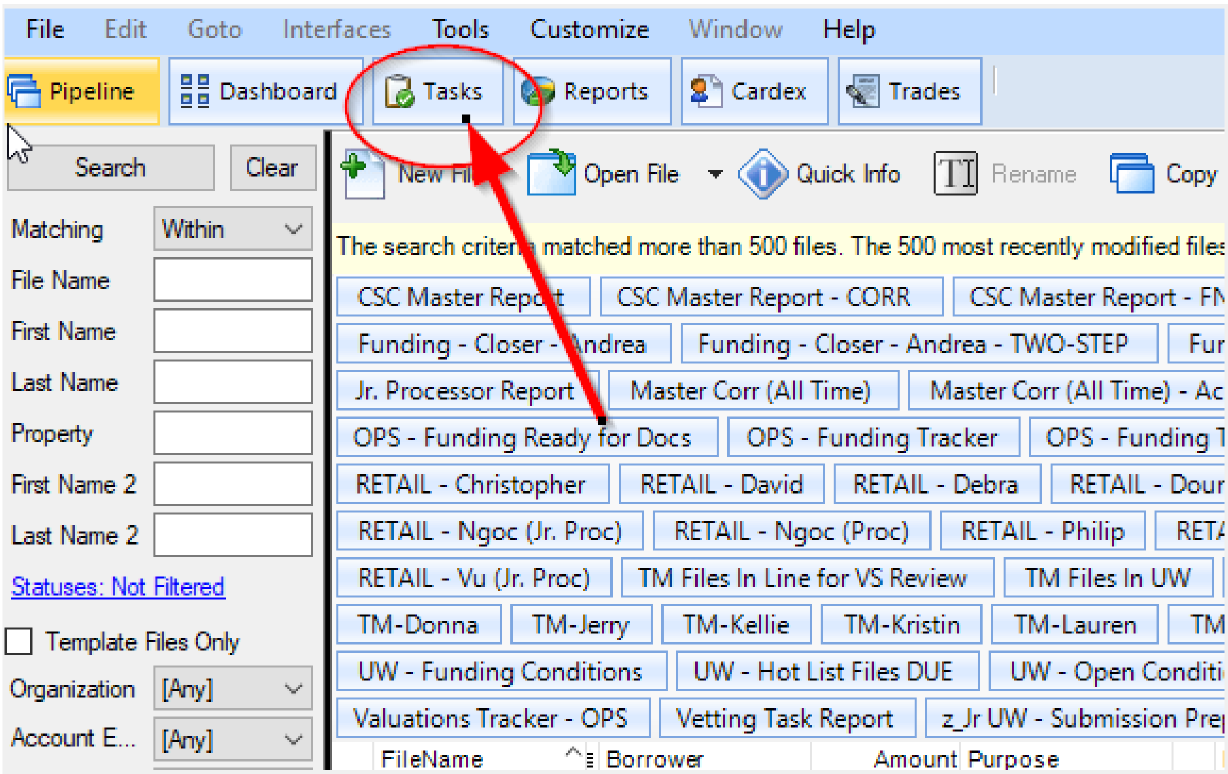
General Guide for creating, assigning and completed tasks within the Bytepro System.

When login to the system you will be prompted to you home page. (Listed below)

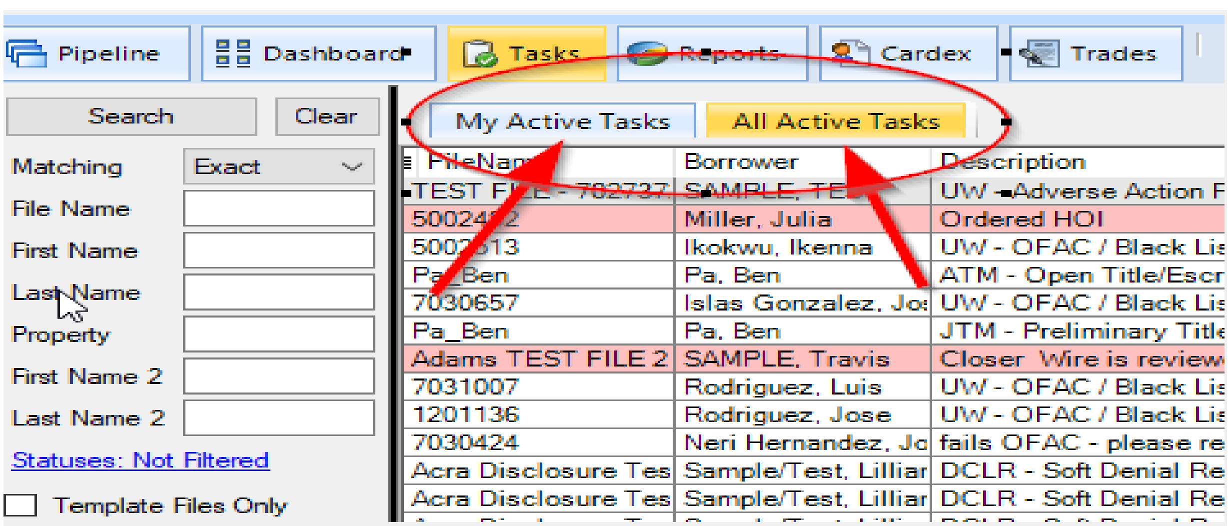
Please note: the illustration may look different from yours depending on your credentials within the system. (Will not have as many tabs on your screen)



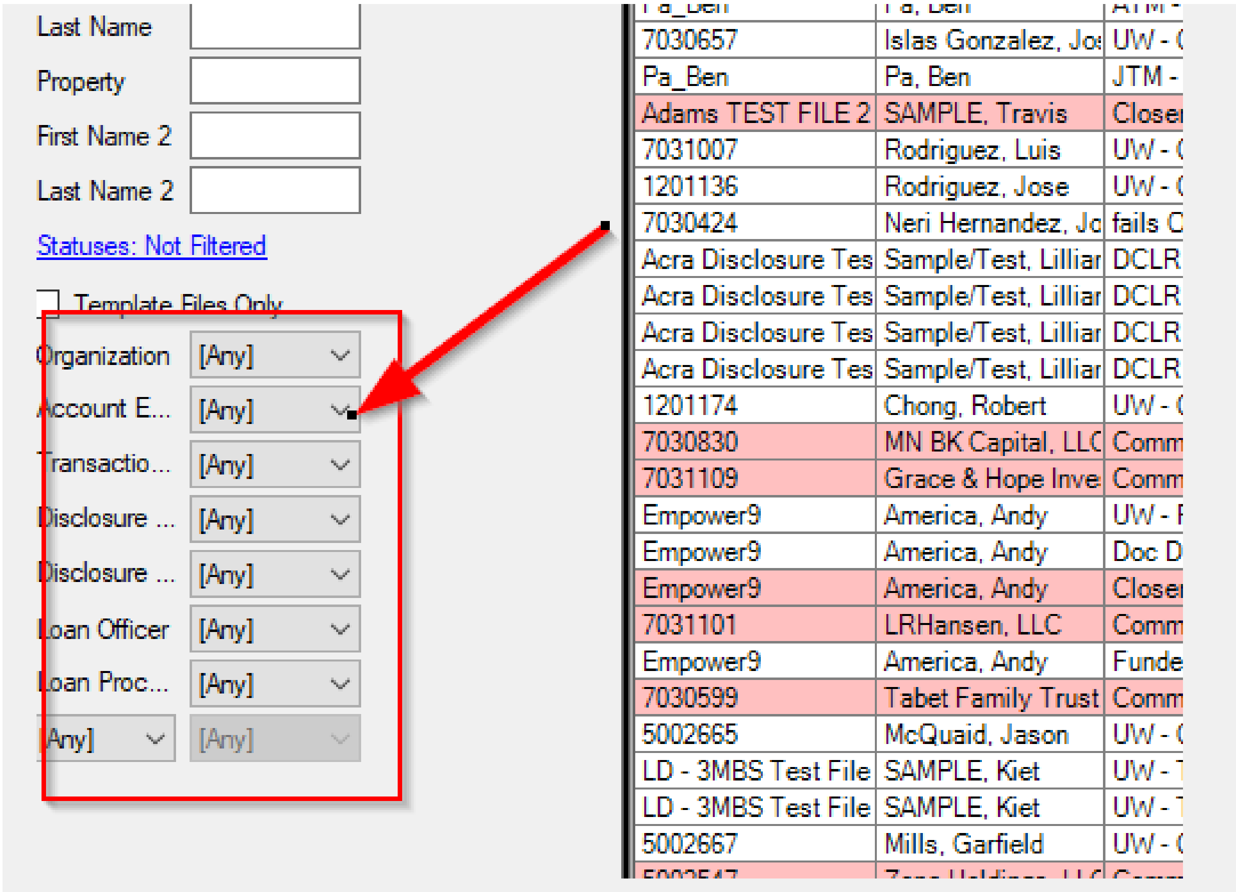
Now there is a couple ways to find the task/s that have been assigned to you. The simplest way is simply by clicking on the Tasks Tab located at the Top of the menu bar. (Shown below)



Once you have clicked that the system will generate two tabs.

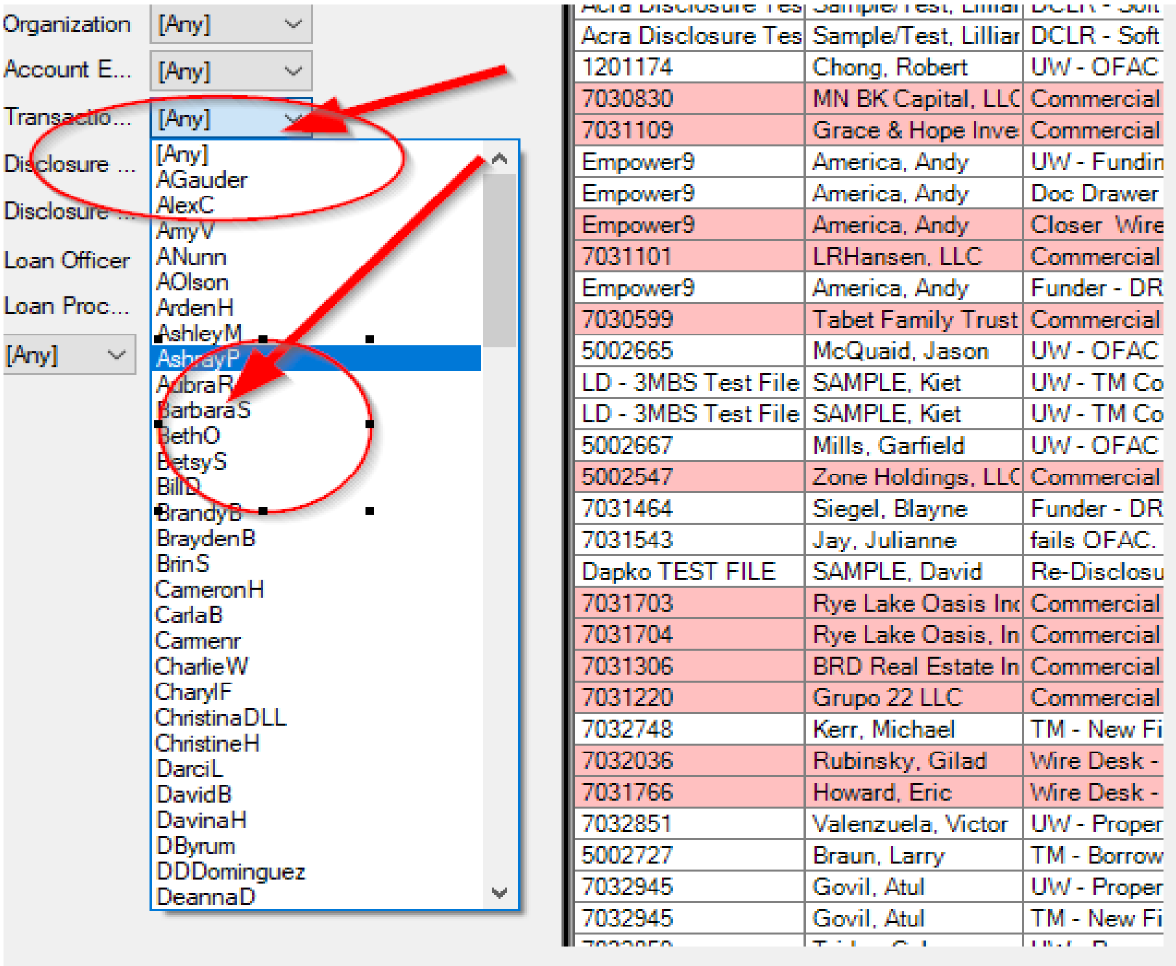


After this selection has been done you can the filter the tasks by department and then role. **For example, please see below.**

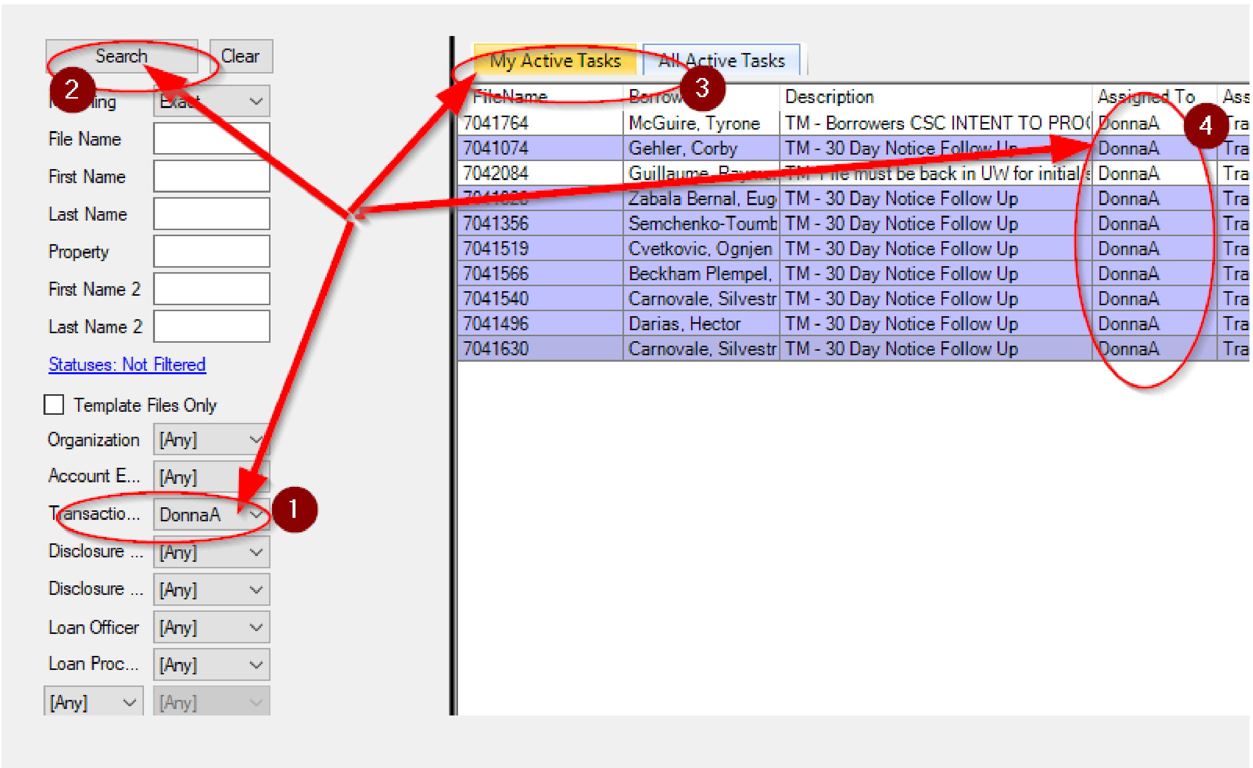


This is located on the left-hand side of the screen within Byte Pro.

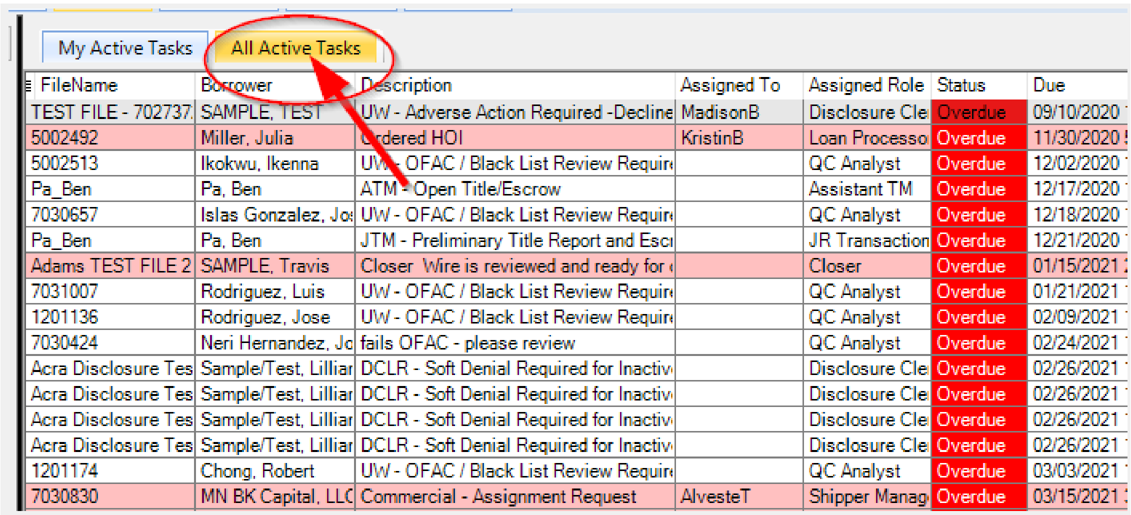
Once role has been established simply filter by name. (Shown below)



Click on your name then click **Search** once you have the filtered list. Click on **My Active Tasks,** the system will then give a personal list of currently active tasks assigned to you. **(Please below) Please see the numbered illustration.**

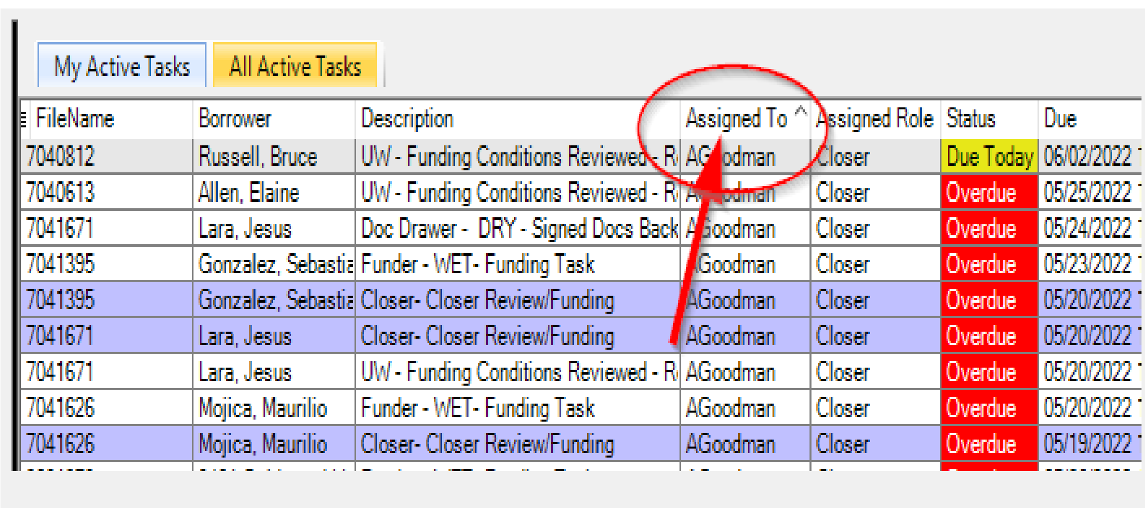


Now you have two options you can click on **All Active Tasks** which will provide all general tasks assigned to everyone within the Company. Note: they will not be any specific order. (As shown below)



FileName	Borrower	Description	Assigned To	Assigned Role	Status	Due
TEST FILE - 702737	SAMPLE, TEST	UW - Adverse Action Required -Decline	MadisonB	Disclosure Cle	Overdue	09/10/2020
5002492	Miller, Julia	Ordered HOI	KristinB	Loan Processo	Overdue	11/30/2020
5002513	Ikokwu, Ikenna	UW - OFAC / Black List Review Requir		QC Analyst	Overdue	12/02/2020
Pa_Ben	Pa, Ben	ATM - Open Title/Escrow		Assistant TM	Overdue	12/17/2020
7030657	Islas Gonzalez, Jo	UW - OFAC / Black List Review Requir		QC Analyst	Overdue	12/18/2020
Pa_Ben	Pa, Ben	JTM - Preliminary Title Report and Esc		JR Transaction	Overdue	12/21/2020
Adams TEST FILE 2	SAMPLE, Travis	Closer Wire is reviewed and ready for		Closer	Overdue	01/15/2021
7031007	Rodriguez, Luis	UW - OFAC / Black List Review Requir		QC Analyst	Overdue	01/21/2021
1201136	Rodriguez, Jose	UW - OFAC / Black List Review Requir		QC Analyst	Overdue	02/09/2021
7030424	Neri Hernandez, Jo	fails OFAC - please review		QC Analyst	Overdue	02/24/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
Acra Disclosure Tes	Sample/Test, Lilliar	DCLR - Soft Denial Required for Inactiv		Disclosure Cle	Overdue	02/26/2021
1201174	Chong, Robert	UW - OFAC / Black List Review Requir		QC Analyst	Overdue	03/03/2021
7030830	MN BK Capital, LLC	Commercial - Assignment Request	AlvesteT	Shipper Manag	Overdue	03/15/2021

But you can easily place them in Alphabetical order by simply clicking on a specific column, whether you like it to be by **Filename, Borrower Description, Assigned to and/or Assigned Role etc**. In this example we will do it by Assigned to. (Please see Below)

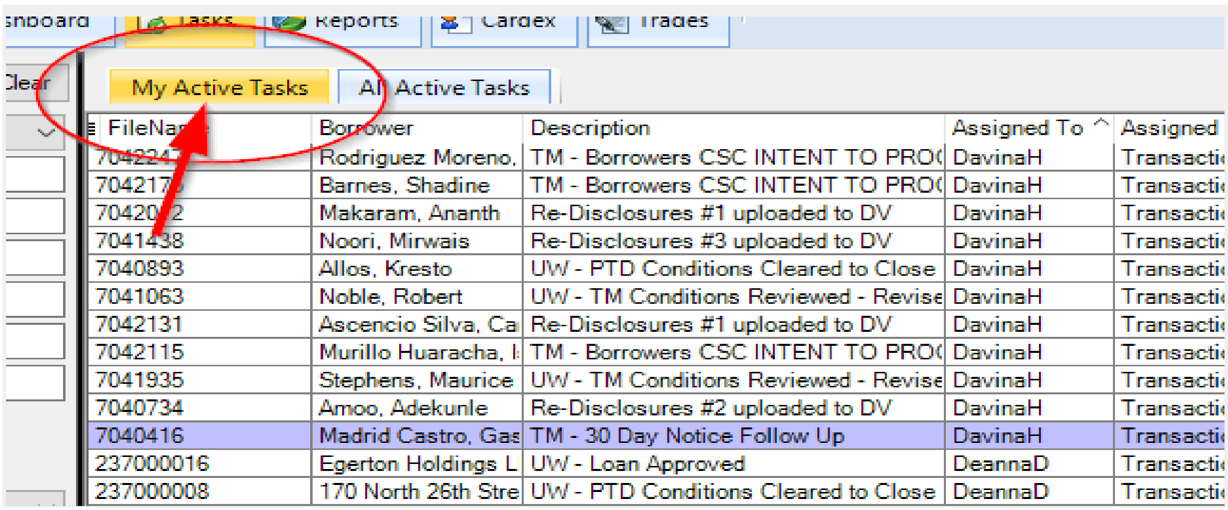


FileName	Borrower	Description	Assigned To	Assigned Role	Status	Due
7040812	Russell, Bruce	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Due Today	06/02/2022
7040613	Allen, Elaine	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Overdue	05/25/2022
7041671	Lara, Jesus	Doc Drawer - DRY - Signed Docs Back	AGoodman	Closer	Overdue	05/24/2022
7041395	Gonzalez, Sebastia	Funder - WET- Funding Task	AGoodman	Closer	Overdue	05/23/2022
7041395	Gonzalez, Sebastia	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/20/2022
7041671	Lara, Jesus	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/20/2022
7041671	Lara, Jesus	UW - Funding Conditions Reviewed - R	AGoodman	Closer	Overdue	05/20/2022
7041626	Mojica, Maurilio	Funder - WET- Funding Task	AGoodman	Closer	Overdue	05/20/2022
7041626	Mojica, Maurilio	Closer- Closer Review/Funding	AGoodman	Closer	Overdue	05/19/2022

As you can see the system has now placed all tasks in Alphabetical Order by Assigned to.

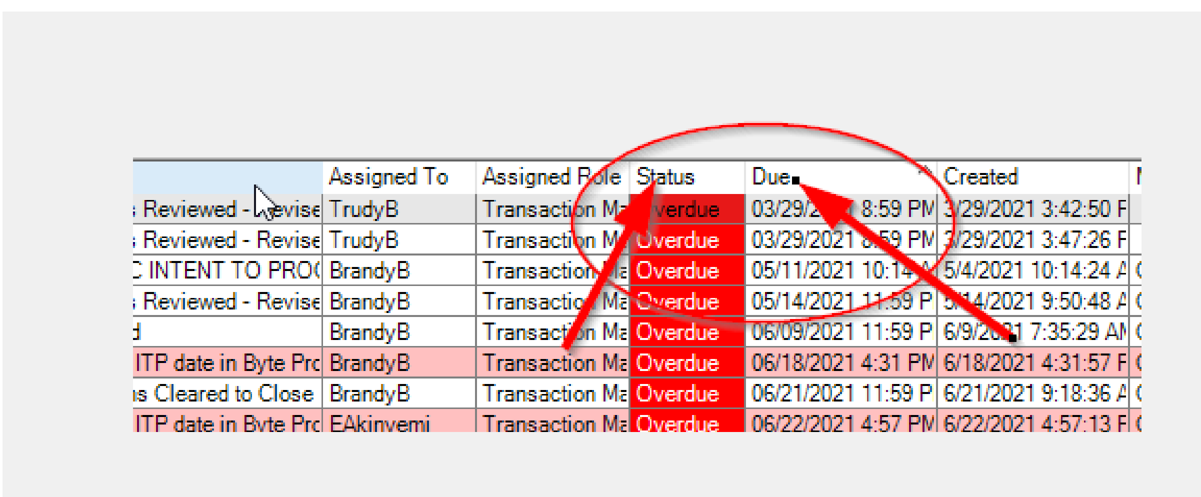
Now you can simply scroll down to your name and find the specific tasks assigned to you.

Second Method: is simply clicking on the My Active Tasks the system will generate the tasks your currently have open that have been assigned to you. (Shown below)



FileName	Borrower	Description	Assigned To	Assigned
70422	Rodriguez Moreno,	TM - Borrowers CSC INTENT TO PRO(	DavinaH	Transacti
704217	Barnes, Shadine	TM - Borrowers CSC INTENT TO PRO(	DavinaH	Transacti
70420 2	Makaram, Ananth	Re-Disclosures #1 uploaded to DV	DavinaH	Transacti
7041438	Noori, Mirwais	Re-Disclosures #3 uploaded to DV	DavinaH	Transacti
7040893	Allos, Kresto	UW - PTD Conditions Cleared to Close	DavinaH	Transacti
7041063	Noble, Robert	UW - TM Conditions Reviewed - Revise	DavinaH	Transacti
7042131	Ascencio Silva, Ca	Re-Disclosures #1 uploaded to DV	DavinaH	Transacti
7042115	Murillo Huaracha, I	TM - Borrowers CSC INTENT TO PRO(	DavinaH	Transacti
7041935	Stephens, Maurice	UW - TM Conditions Reviewed - Revise	DavinaH	Transacti
7040734	Amoo, Adekunle	Re-Disclosures #2 uploaded to DV	DavinaH	Transacti
7040416	Madrid Castro, Gas	TM - 30 Day Notice Follow Up	DavinaH	Transacti
237000016	Egerton Holdings L	UW - Loan Approved	DeannaD	Transacti
237000008	170 North 26th Stre	UW - PTD Conditions Cleared to Close	DeannaD	Transacti

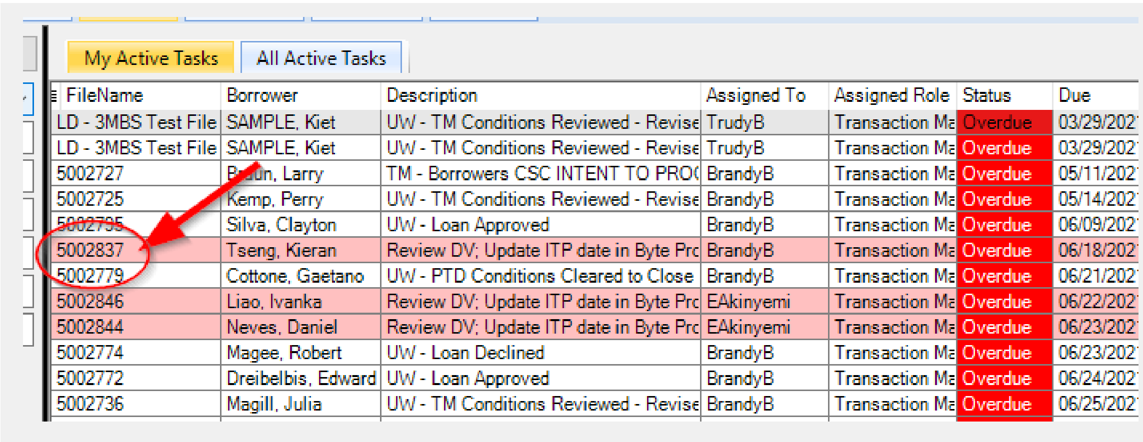
From here you can simply look at the different columns on the top and determine how you would like to address your loans. For example: would you like to work the loans by Status, Due Date and/or specifications. I can click on the Due Date then click on the Status now the system will show me the **Overdue Status by Due Date**. (See below)



	Assigned To	Assigned Role	Status	Due	Created
Reviewed - Revise	TrudyB	Transaction M	Overdue	03/29/2 8:59 PM	3/29/2021 3:42:50 F
Reviewed - Revise	TrudyB	Transaction M	Overdue	03/29/2021 8:59 PM	3/29/2021 3:47:26 F
INTENT TO PRO(	BrandyB	Transaction Ma	Overdue	05/11/2021 10:14	5/4/2021 10:14:24 A
Reviewed - Revise	BrandyB	Transaction Ma	Overdue	05/14/2021 11:59 P	5/14/2021 9:50:48 A
d	BrandyB	Transaction Ma	Overdue	06/09/2021 11:59 P	6/9/2021 7:35:29 AM
ITP date in Byte Pro	BrandyB	Transaction Ma	Overdue	06/18/2021 4:31 PM	6/18/2021 4:31:57 F
is Cleared to Close	BrandyB	Transaction Ma	Overdue	06/21/2021 11:59 P	6/21/2021 9:18:36 A
ITP date in Byte Pro	EAkinyemi	Transaction Ma	Overdue	06/22/2021 4:57 PM	6/22/2021 4:57:13 F

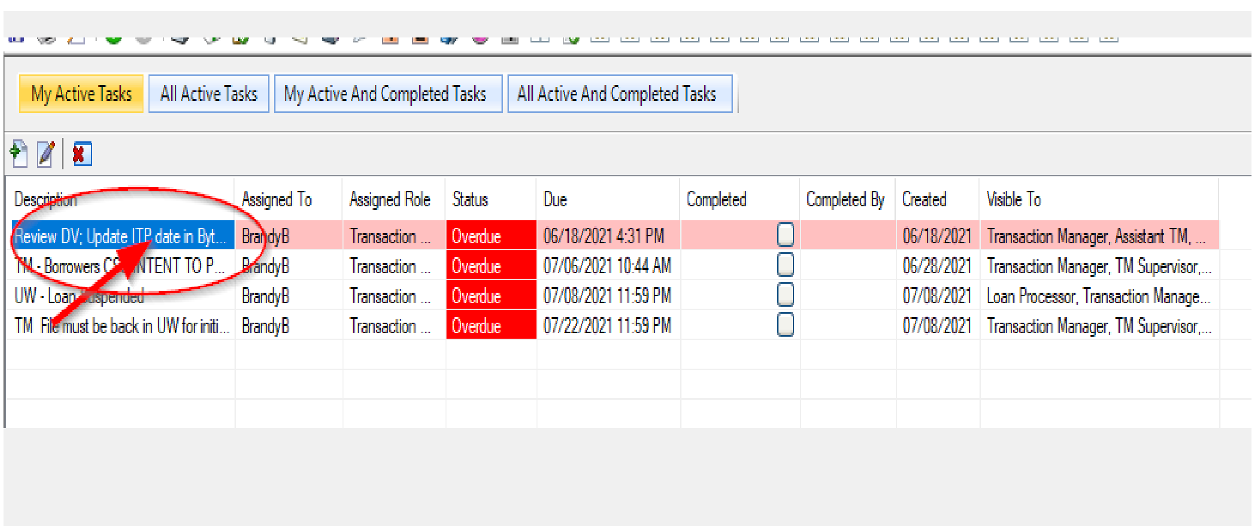
Allowing to Prioritize my Status by urgency and age.

Once you have established your work flow you can now start working on completing your aged tasks. You simply have to click on a specific loan.


My Active Tasks | All Active Tasks

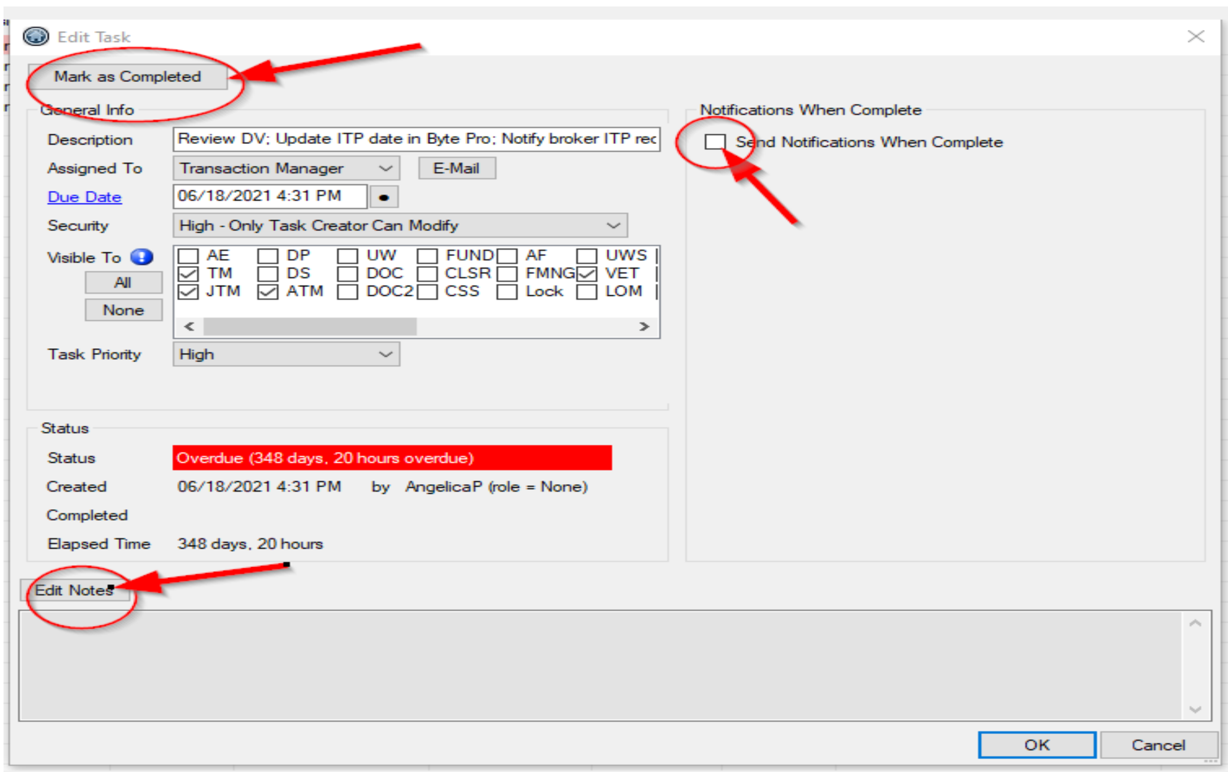
FileName	Borrower	Description	Assigned To	Assigned Role	Status	Due
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Conditions Reviewed - Revise	TrudyB	Transaction Ma	Overdue	03/29/202
LD - 3MBS Test File	SAMPLE, Kiet	UW - TM Conditions Reviewed - Revise	TrudyB	Transaction Ma	Overdue	03/29/202
5002727	Braun, Larry	TM - Borrowers CSC INTENT TO PRO(	BrandyB	Transaction Ma	Overdue	05/11/202
5002725	Kemp, Perry	UW - TM Conditions Reviewed - Revise	BrandyB	Transaction Ma	Overdue	05/14/202
5002795	Silva, Clayton	UW - Loan Approved	BrandyB	Transaction Ma	Overdue	06/09/202
5002837	Tseng, Kieran	Review DV; Update ITP date in Byte Prc	BrandyB	Transaction Ma	Overdue	06/18/202
5002779	Cottone, Gaetano	UW - PTD Conditions Cleared to Close	BrandyB	Transaction Ma	Overdue	06/21/202
5002846	Liao, Ivanka	Review DV; Update ITP date in Byte Prc	EAkinyemi	Transaction Ma	Overdue	06/22/202
5002844	Neves, Daniel	Review DV; Update ITP date in Byte Prc	EAkinyemi	Transaction Ma	Overdue	06/23/202
5002774	Magee, Robert	UW - Loan Declined	BrandyB	Transaction Ma	Overdue	06/23/202
5002772	Dreibelbis, Edward	UW - Loan Approved	BrandyB	Transaction Ma	Overdue	06/24/202
5002736	Magill, Julia	UW - TM Conditions Reviewed - Revise	BrandyB	Transaction Ma	Overdue	06/25/202

The system will take you to that specific loan. In the task/s menu and you can address the specific tasks assigned to you. By simply clicking on the specific task.

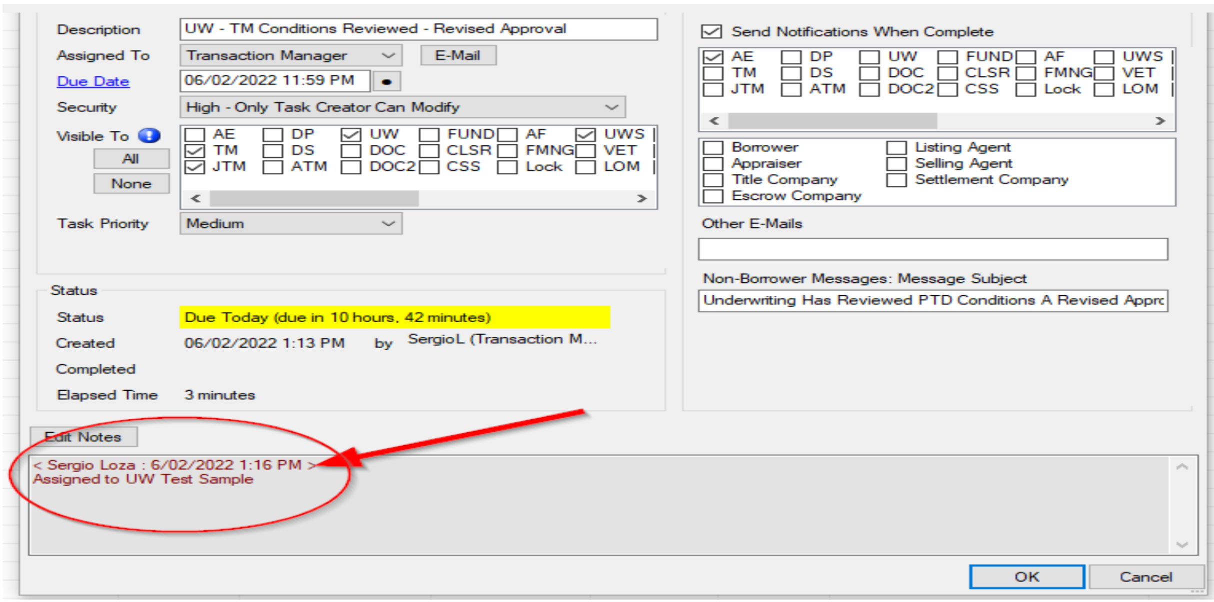

My Active Tasks | All Active Tasks | My Active And Completed Tasks | All Active And Completed Tasks

Description	Assigned To	Assigned Role	Status	Due	Completed	Completed By	Created	Visible To
Review DV; Update ITP date in Byt...	BrandyB	Transaction ...	Overdue	06/18/2021 4:31 PM			06/18/2021	Transaction Manager, Assistant TM, ...
TM - Borrowers CSC INTENT TO P...	BrandyB	Transaction ...	Overdue	07/06/2021 10:44 AM			06/28/2021	Transaction Manager, TM Supervisor,...
UW - Loan Suspended	BrandyB	Transaction ...	Overdue	07/08/2021 11:59 PM			07/08/2021	Loan Processor, Transaction Manage...
TM File must be back in UW for initi...	BrandyB	Transaction ...	Overdue	07/22/2021 11:59 PM			07/08/2021	Transaction Manager, TM Supervisor,...

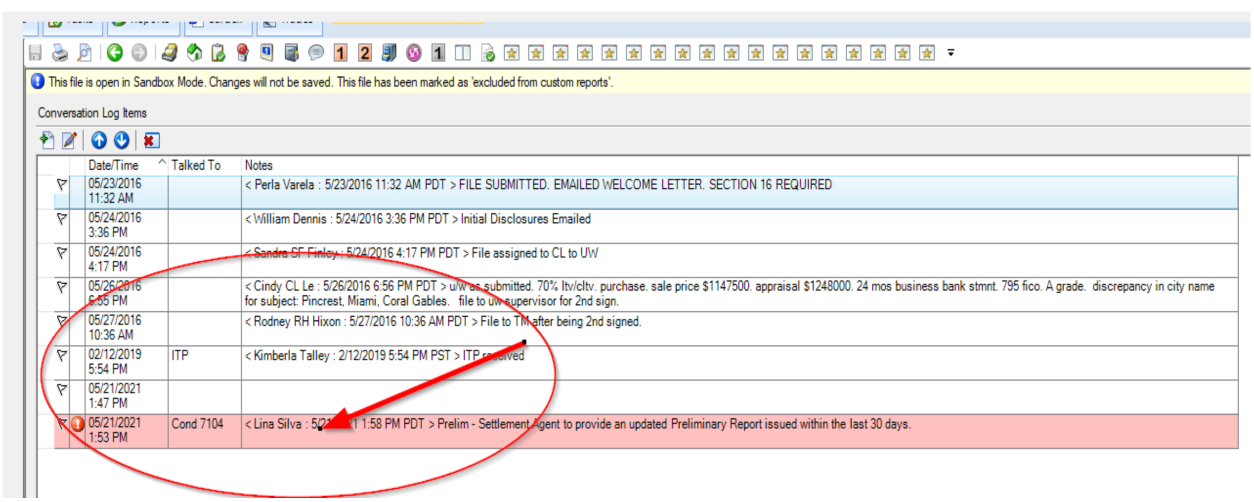
The system will then open the Edit Task box. From here you can complete make a note, send a notification when it has been complete. (See below) the system will also provide all the details of the Task.



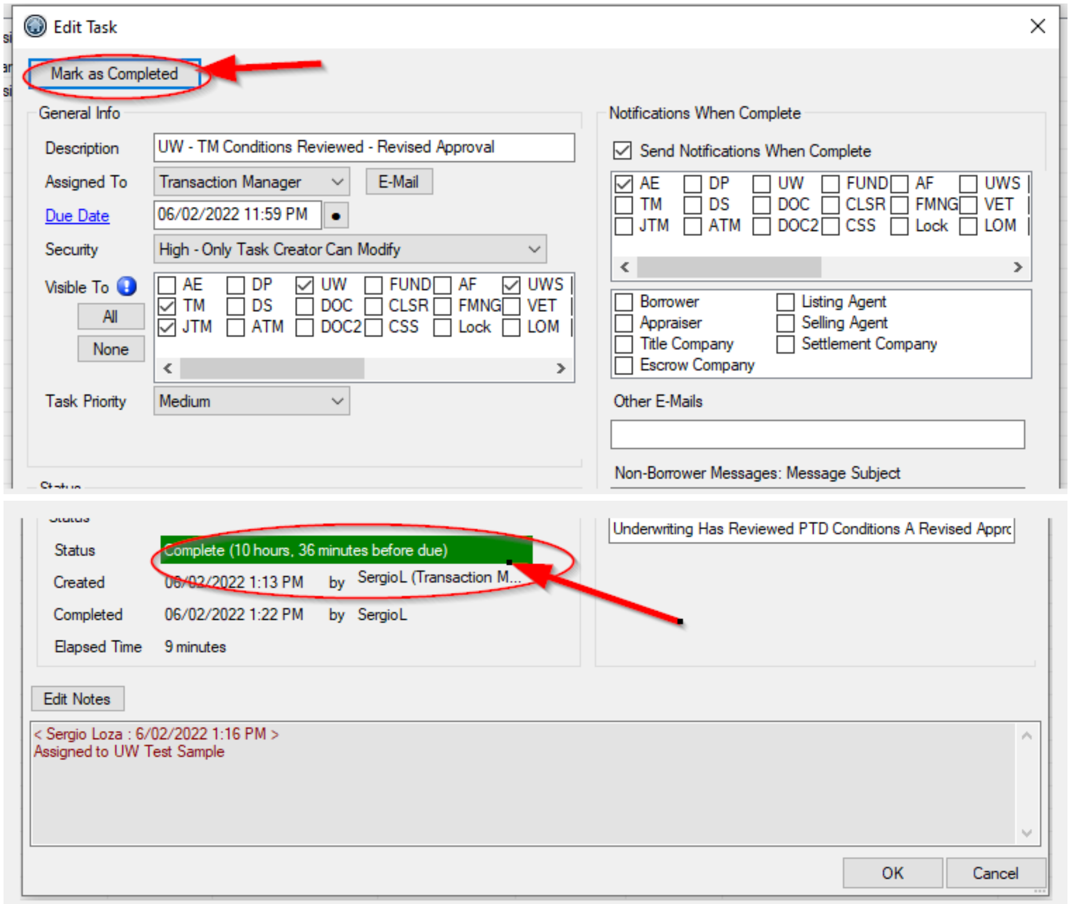
Note: Adding notes in the note section it will not transfer over to the General Note section in the loan. **This is simply for your record within in the Tasks itself.**



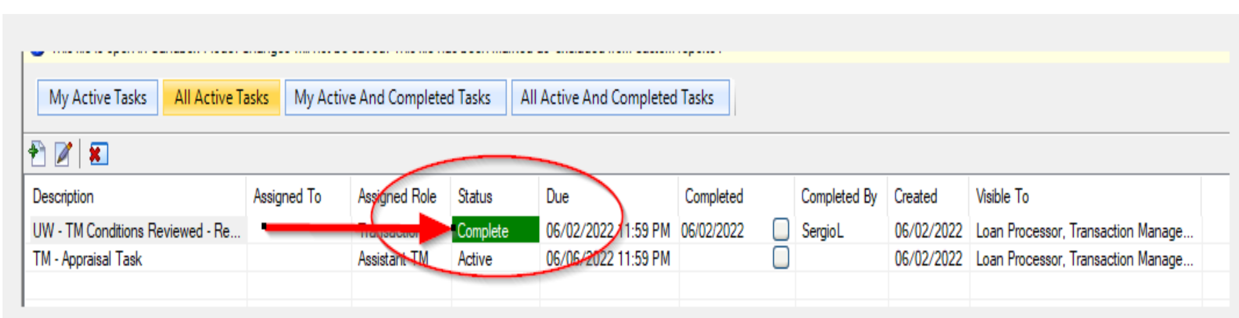
As you can see, I made a note in the Edit Tasks section but it didn't transfer over to the General Note section on the production side.



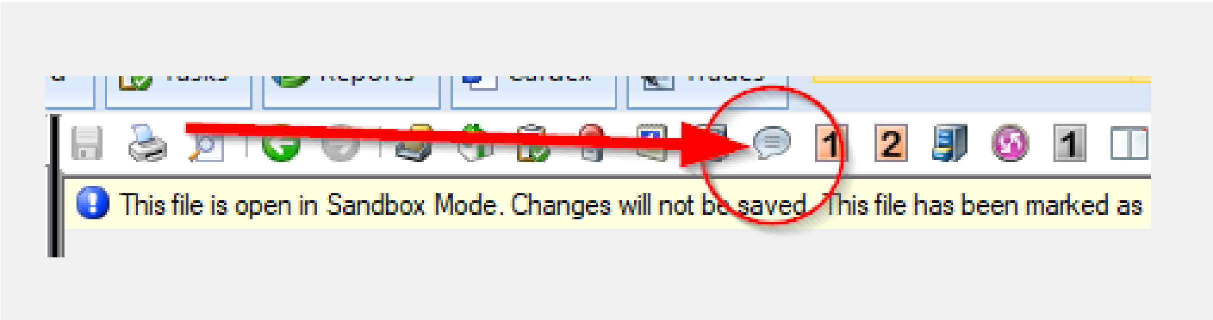
Once you click on the Mark as Completed the system will then complete the task and mark in green as shown here.



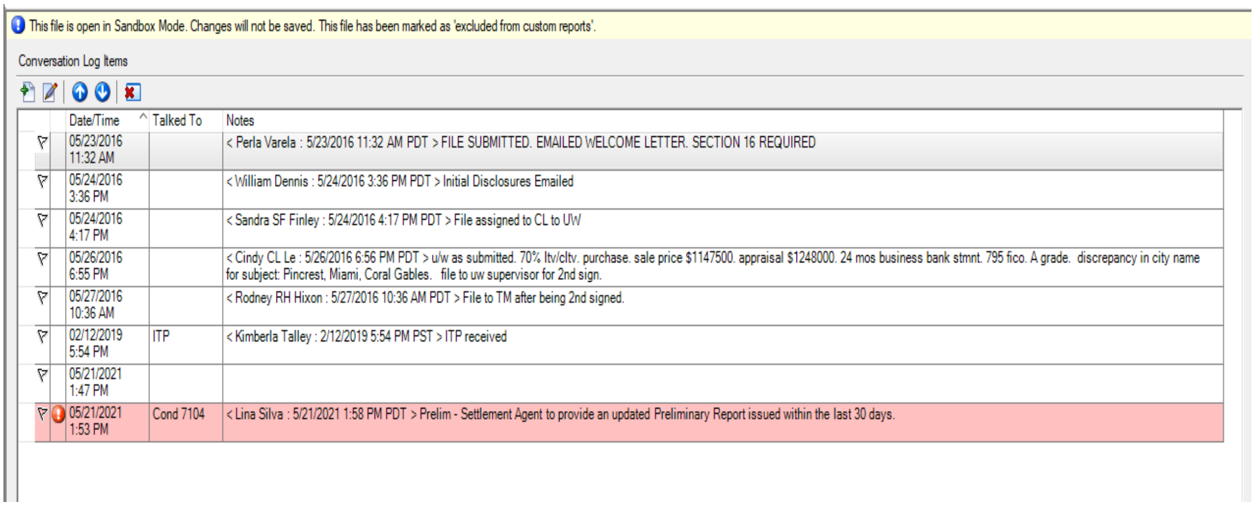
Once you have closed the window it will reflect the Complete status in the All-Active Tasks.



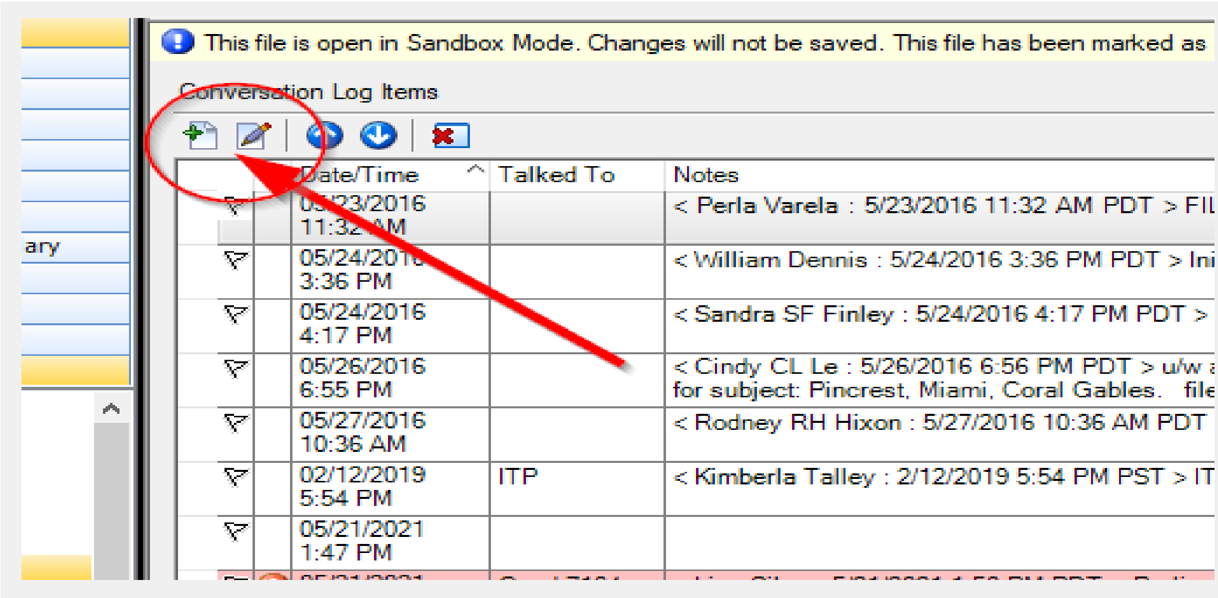
You can the move on to Notating the loan accordingly. By simply clicking on the conversation Icon.



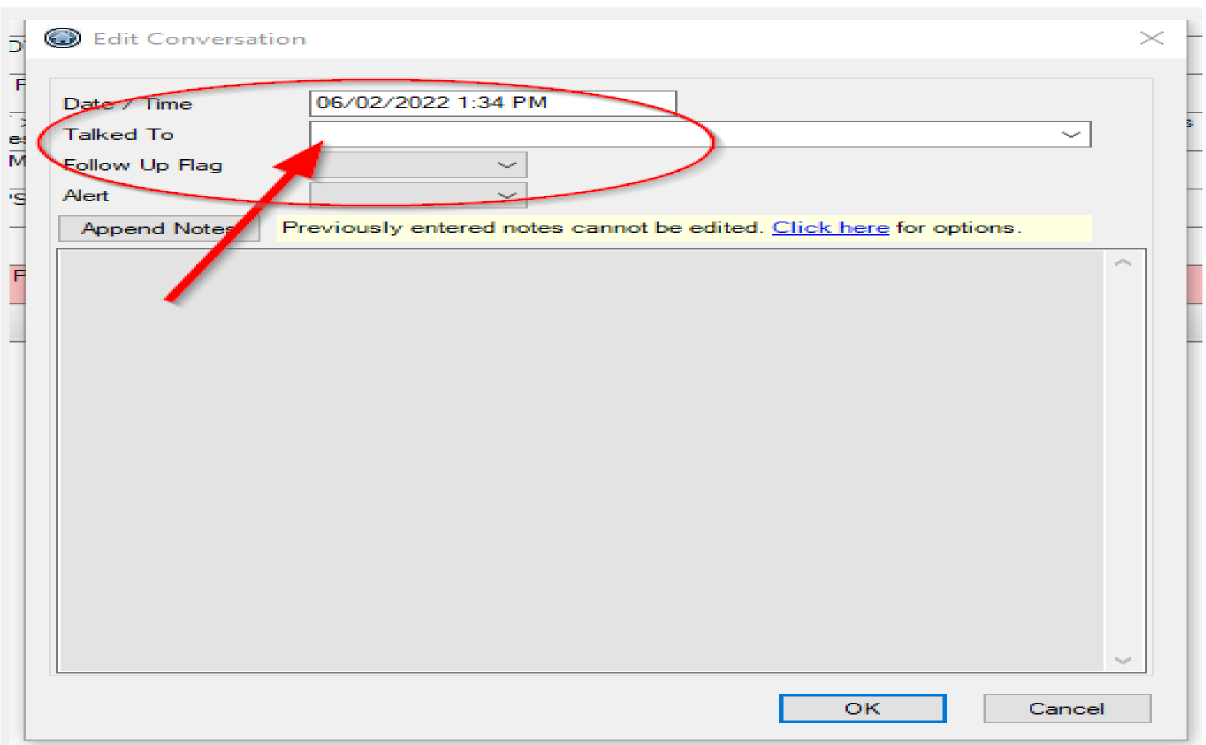
The system will then open the conversation log.



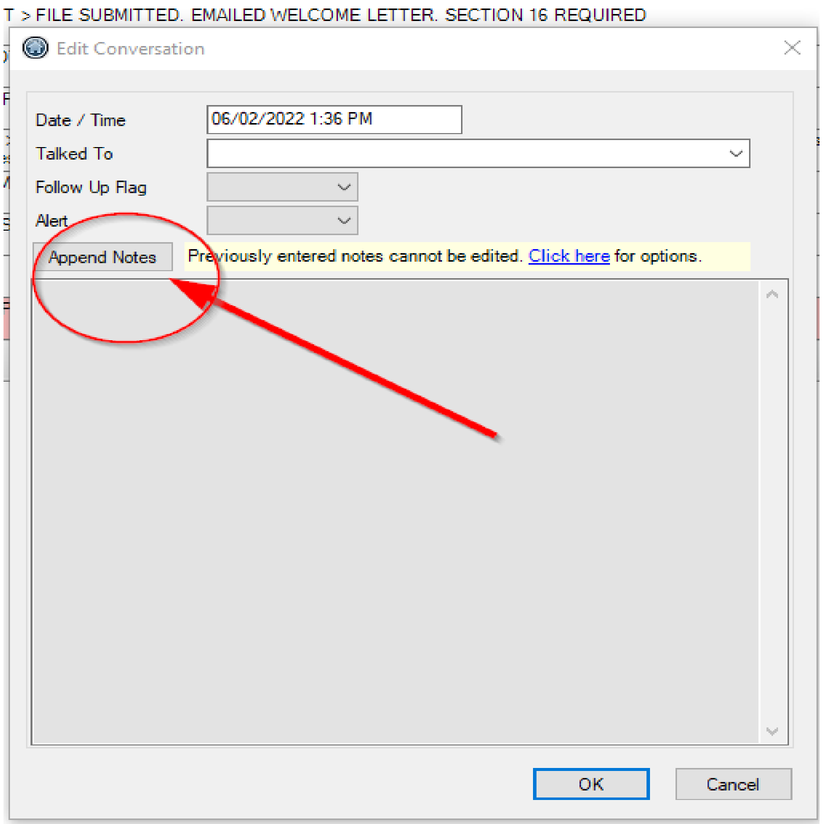
You click on the **Add note** on the **Top Left.**



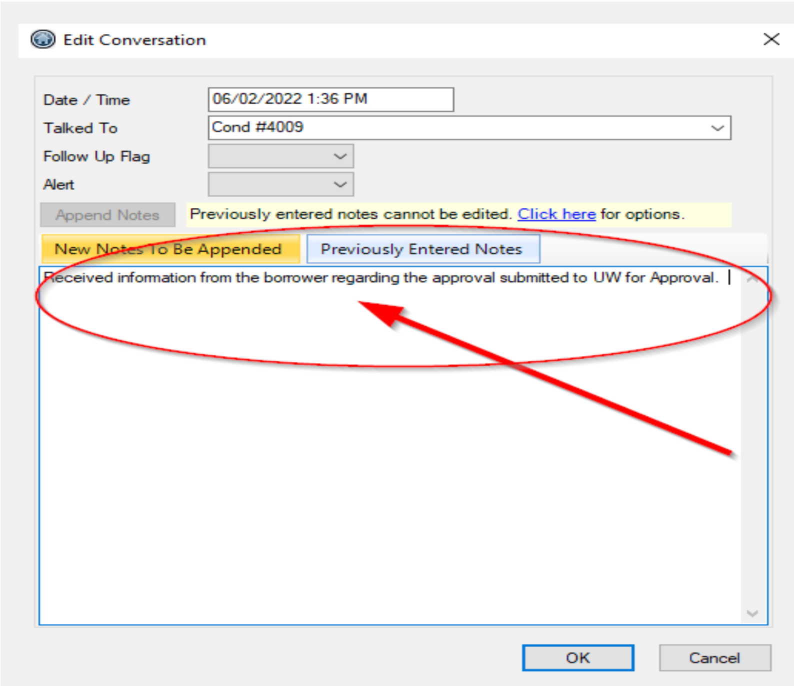
Fill in the necessary format on the Talked to: Section.



Click on Append Note tab.



Document your loan accordingly. (Click ok)



Confirm documentation has been recorded and move on the to the next loan.