



Broker Conditions Upload Guide



UPLOADING CONDITIONS TO CITADEL SERVICING CORPORATION

1. Go to the CSC Broker Portal ACCOUNT ACCESS tab at: <https://citadelservicing.com/broker-portal/>
2. Enter your **username** and **password**.
**select reset password if you have forgotten your password*

A screenshot of the Citadel Servicing Corporation Broker Portal login page. The page has a dark red header with the Citadel logo and navigation links: HOME, ABOUT CSC, BORROWER, BROKER, CORRESPONDENT, CSC PROGRAMS, CONTACT US, and an APPLY NOW button. Below the header is a large red banner that says 'BROKER PORTAL'. On the left is a sidebar with links: ACCOUNT ACCESS (highlighted), CSC PROGRAMS, TURN TIMES, WHOLESALE FILE UPLOAD, and FUNDED DEALS. The main content area has a yellow warning box that says 'IMPORTANT: Brokers must log in below to upload loan conditions to your assigned Transaction Manager.' Below this are input fields for 'Username or E-mail' (containing 'trudyb@citadelservicing.com') and 'Password' (masked with dots). There is a checkbox for 'Keep me signed in' and a red 'Login' button. At the bottom, there is a link for 'Forgot your password?'.

3. Select '**Upload**' in the **Wholesale Conditions** box on your account dashboard.

A screenshot of the Citadel Servicing Corporation Account Dashboard. The dashboard has a dark red header that says 'ACCOUNT DASHBOARD'. Below the header is a light gray section with the text 'Welcome to the CSC Broker Portal'. There are three white boxes with red icons. The first box, 'Wholesale Conditions', is highlighted with a red border and contains an 'Upload' button. The second box, 'Forms and Requests', contains a 'View More' button. The third box, 'Training Materials', contains a 'View More' button.

4. Review the most recent Loan Approval or Suspense Notice issued and select the name of **Transaction Manager** within the drop-down field in the portal.
5. Enter the **CSC Loan # Number Borrower Last Name** within the "FILE NAME" field
IMPORTANT: DO NOT input any special characters in the FILE NAME field (-, /, ,, #)
6. Enter your **email address**
7. Select CONTINUE to open the upload window

Select the Transaction Manager as listed on your most recent Loan Approval or Suspense Notice.

IMPORTANT: Input the CSC Loan # - Borrower Last Name in the FILE NAME field.

- Select -

CSC Loan # Borrower Last Name

Your email address





Continue

8. Upload your files by drag-and-drop or by selecting '**Browse your device**' to select manually. You can upload multiple individual PDFs in one batch. Please avoid uploading one condition at a time.

Before beginning your upload:

- **Save each condition, individually, as a PDF document**
- **Label each PDF with the number noted on the Conditional Loan Approval**
- **Avoid uploading password protected documents through the portal**
- **Do not combine multiple conditions into one PDF**

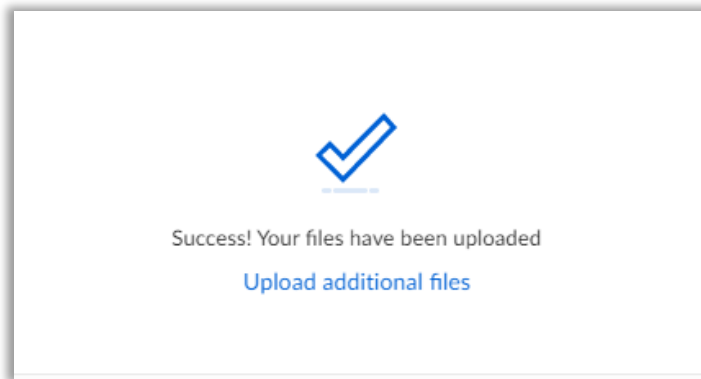
EXAMPLE: If you have 10 conditions, we need 10 LEGIBLE PDF documents

-  4400 - Appraisal
-  4500 - Plat Map
-  4601 - Est CD Settlement Statement
-  4700 - Assets

9. Click **'Upload'** when completed



10. You will receive a **'SUCCESS!'** notification once your items have been delivered. Please notify your CSC Transaction Manager once you have uploaded conditions.



To Reset your Password, use the **"Forgot your password?"** link at the portal login screen.

