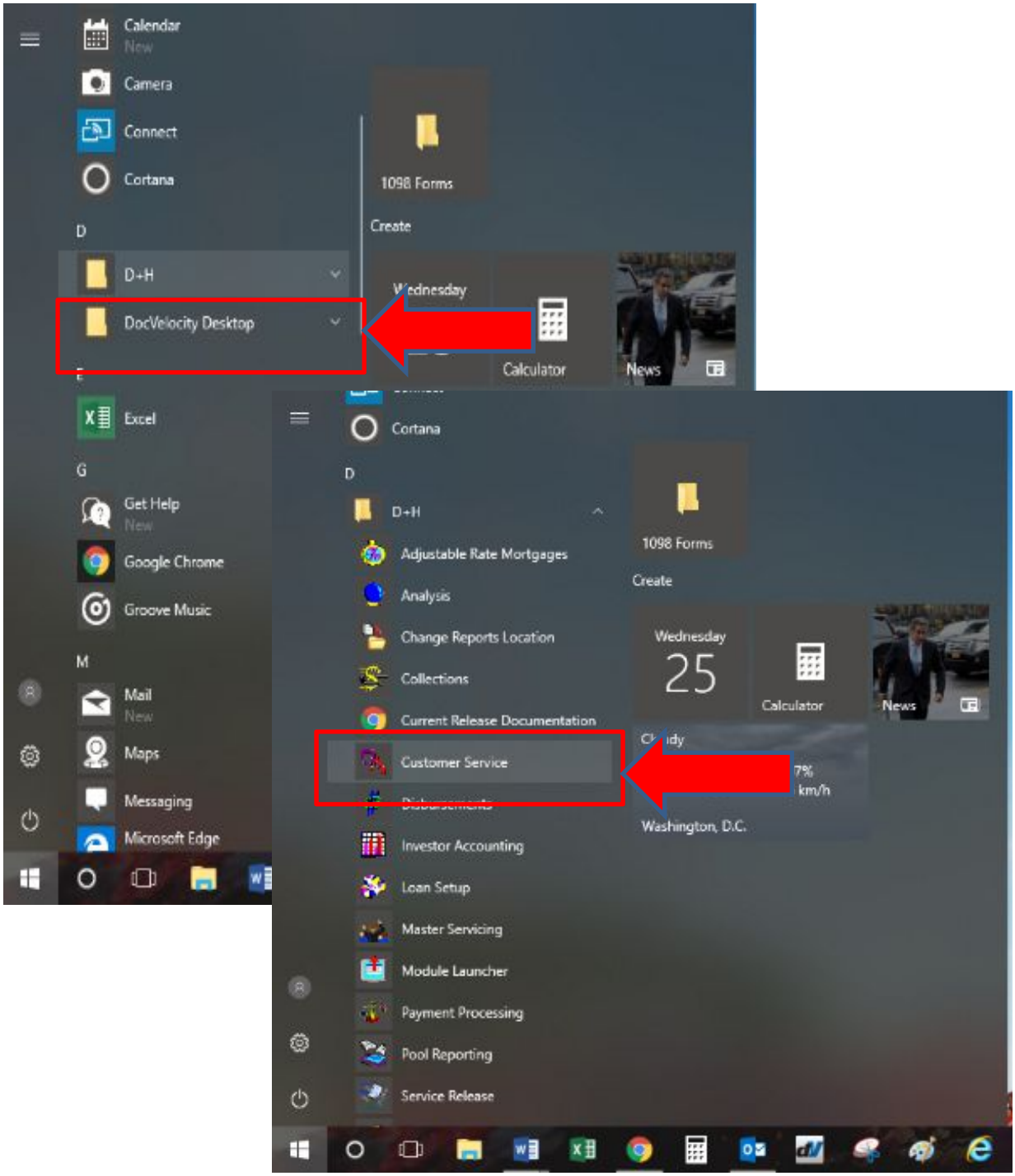
Customer Service Module

Servicing

Customer Service Module

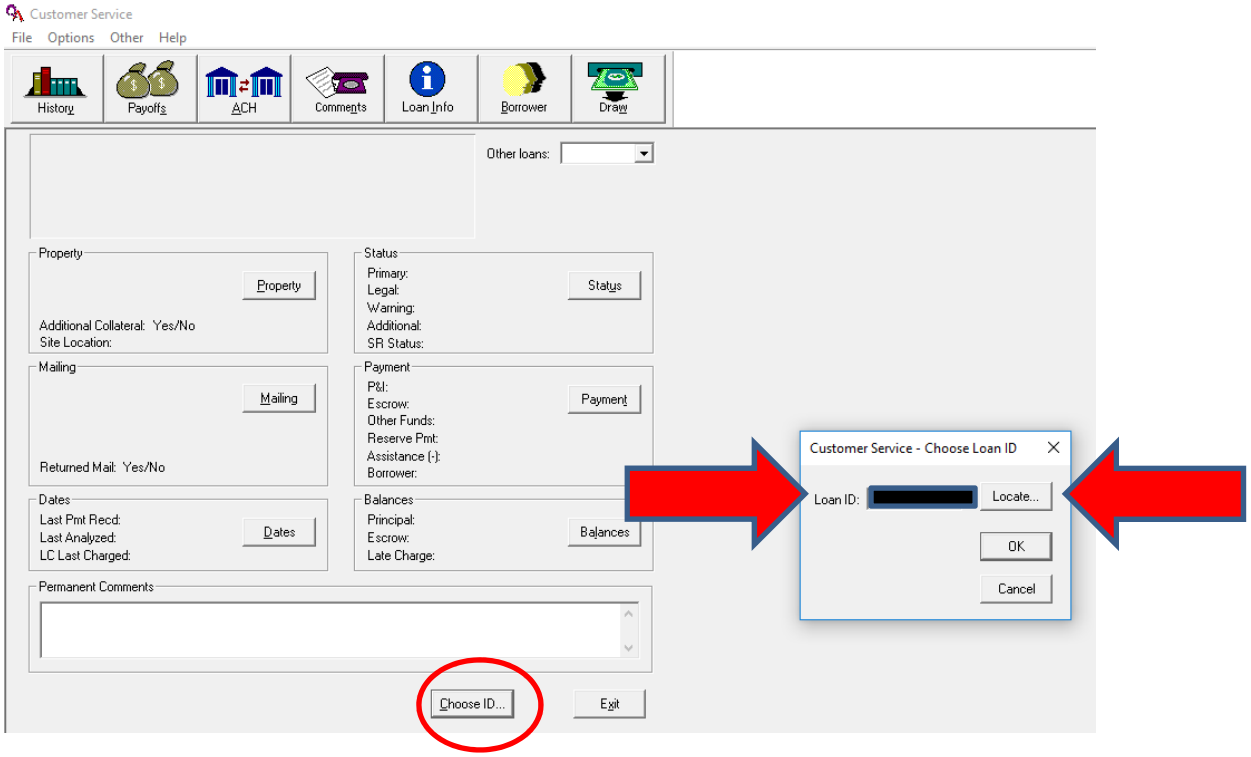


From your Desktop select D&H and then select Customer Service

Customer Service Module

When this screen appears you will Log In and select **OK**

Customer Service Module

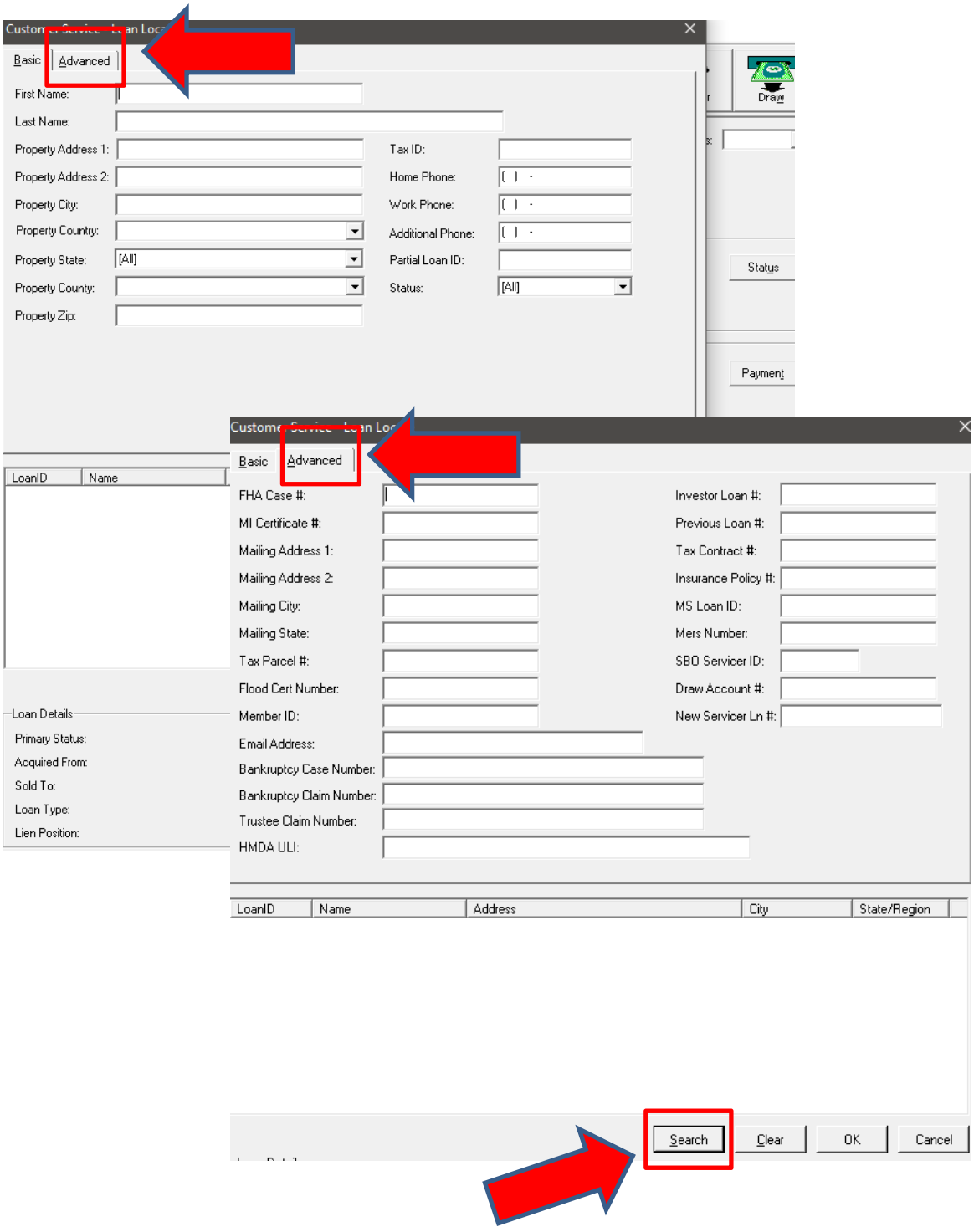


Select Choose ID and the pop up box will appear. Begin by typing in the loan number and clicking "**OK**"

If you do not have the loan number, choose Locate

Notes:

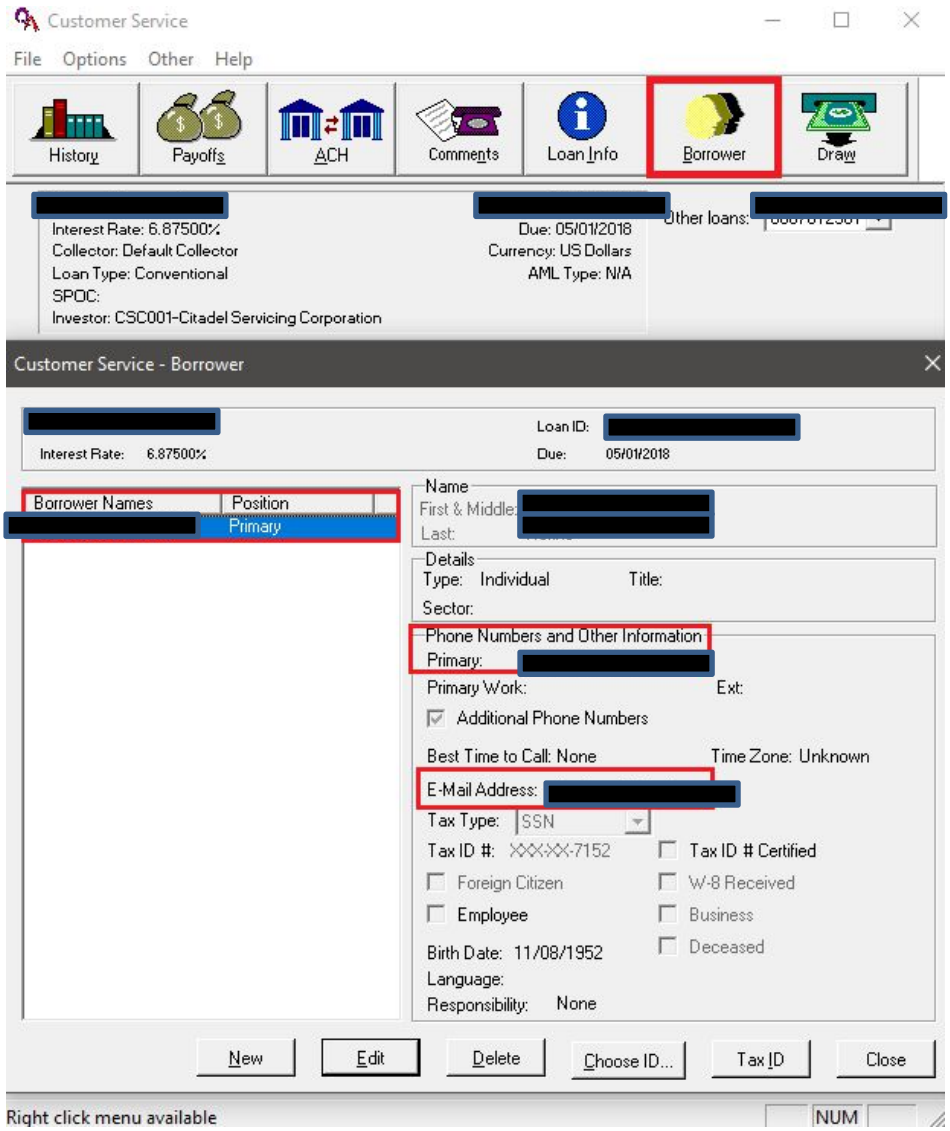
Customer Service Module



NOTE: You can enter any of these fields to locate the account.

You can also click Advance tab for additional ways to locate the borrower's information.

Customer Service Module



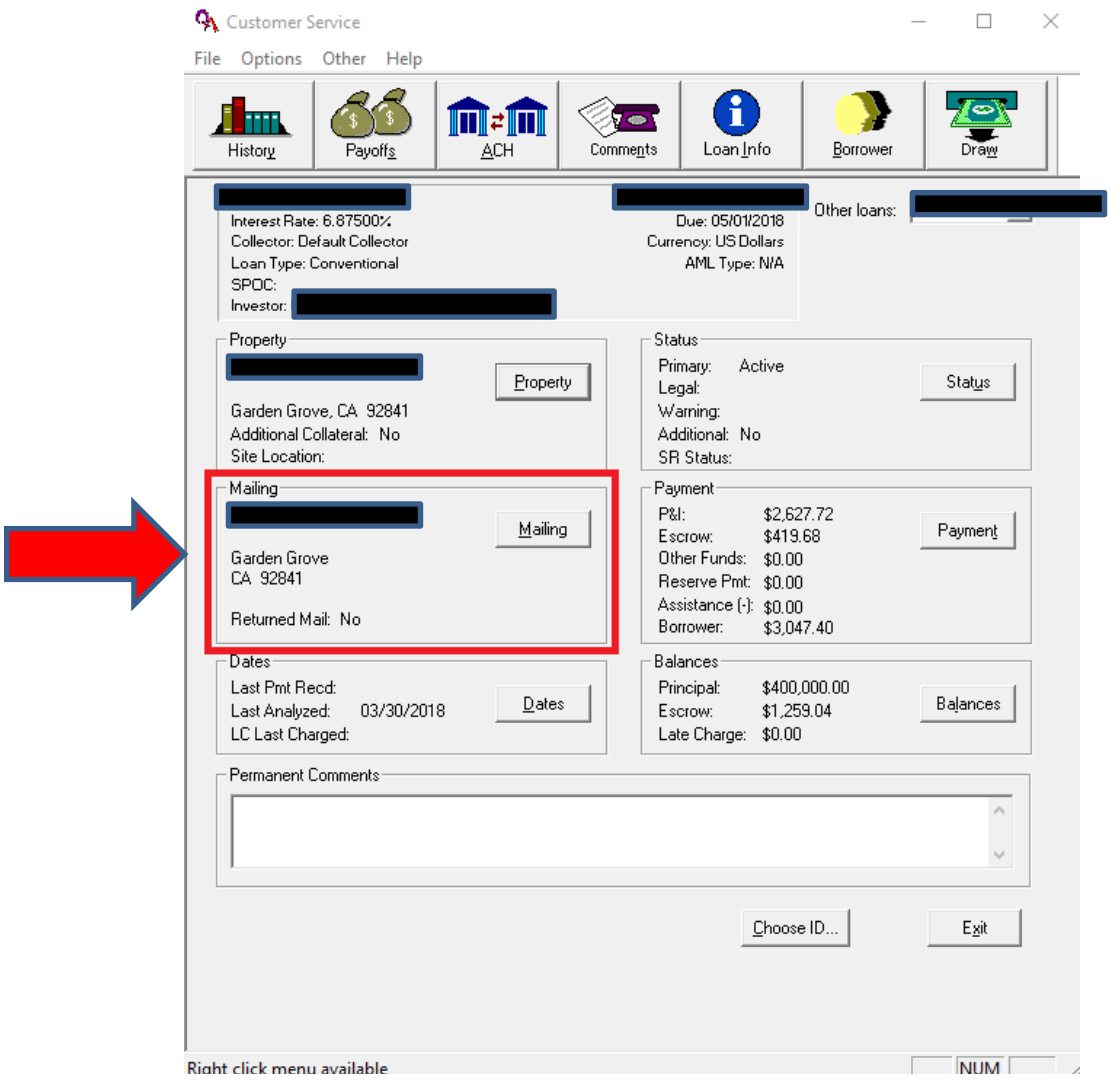
On this screen you will verify:

Borrower's and Co-borrower's (if applicable) information

- **Full name(s)**
- **Phone number's**
- **Email**

If any changes need to be made highlight the borrower on which changes need to be made, then click Edit, then click Ok when changes have been made.

Customer Service Module

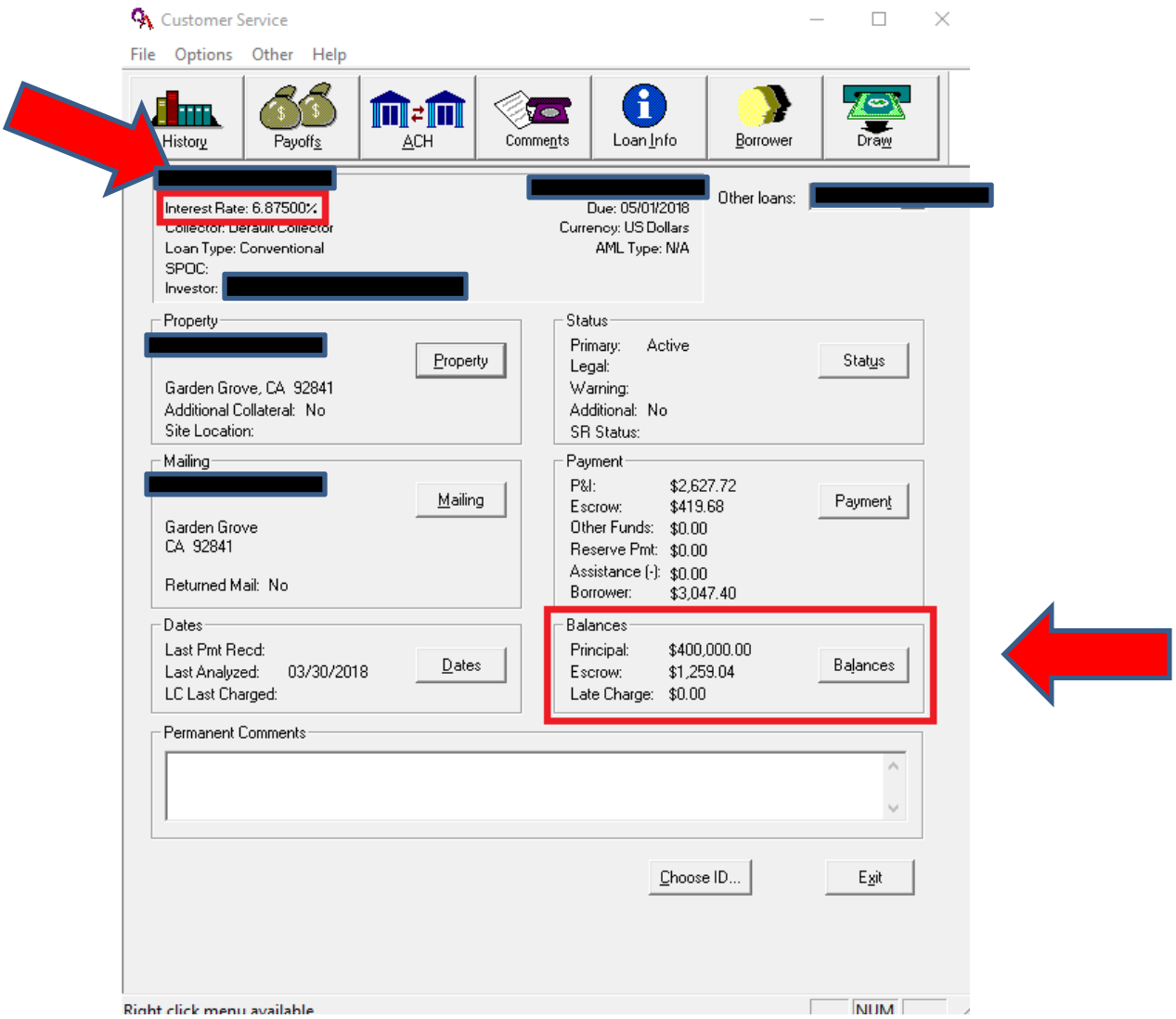


In this screen you will review and verify that the **Mailing Address** is correct.

If the Mailing Address needs to be updated click Mailing, once change has been made, click, OK.

Notes:

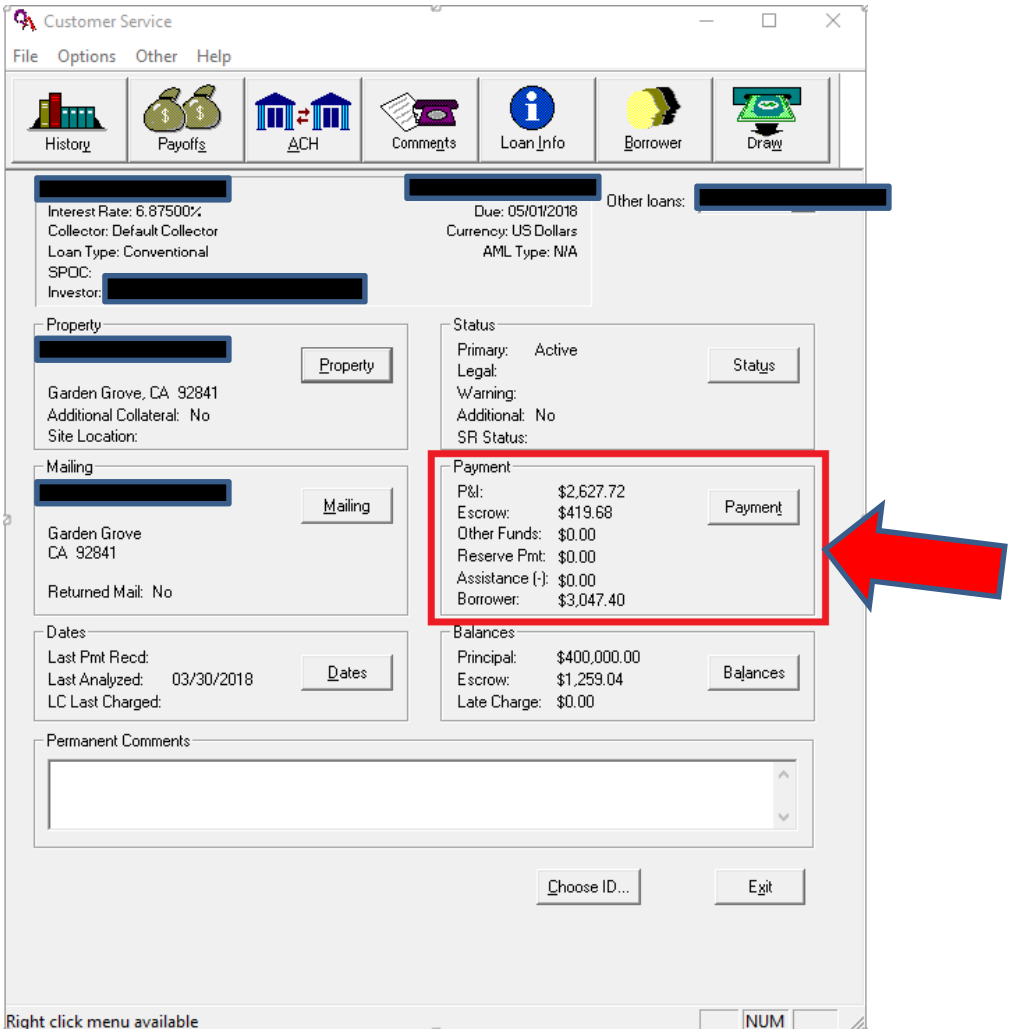
Customer Service Module



On this screen it is important to verify the **Interest Rate** and **Principal Balance.**

Notes:

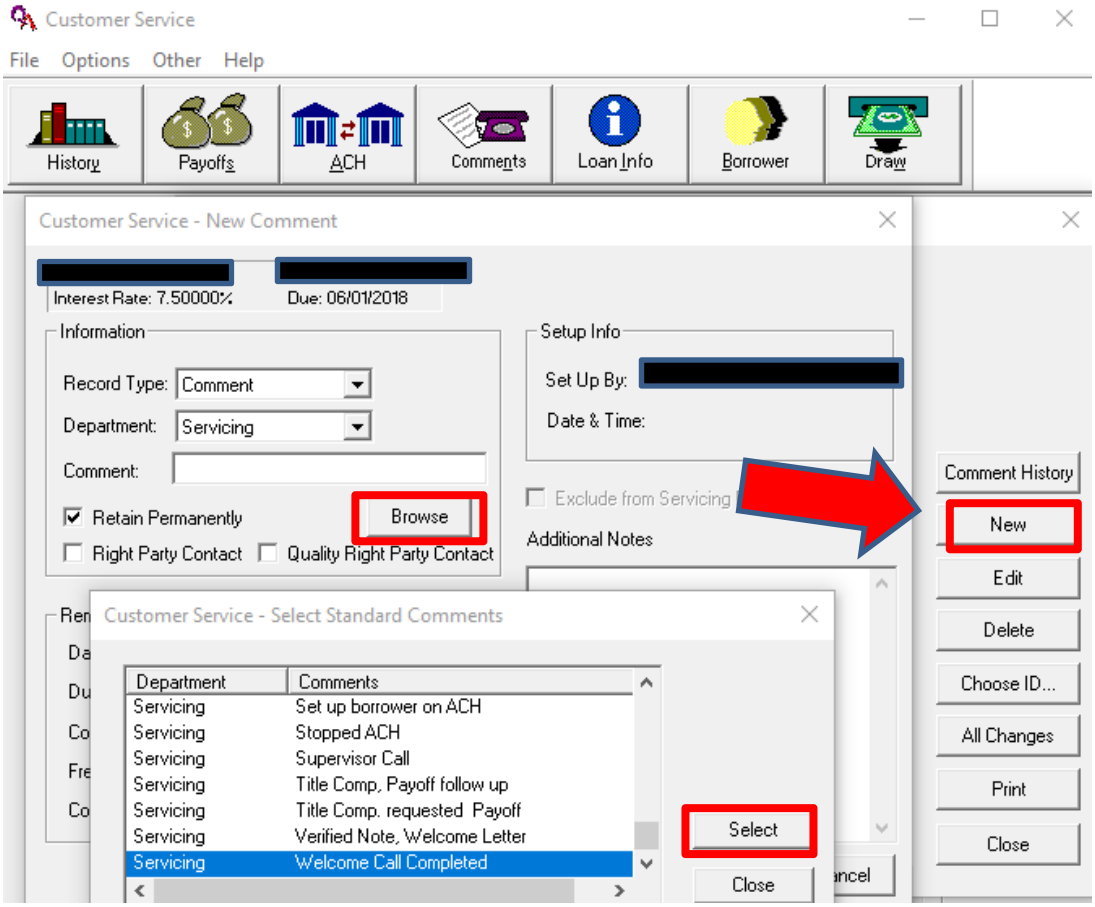
Customer Service Module



In this screen you will verify the **Full Payment Amount**

Also, break down the payment for the borrower stating what goes to **Principal** and **Interest (P&I) & Escrow.**

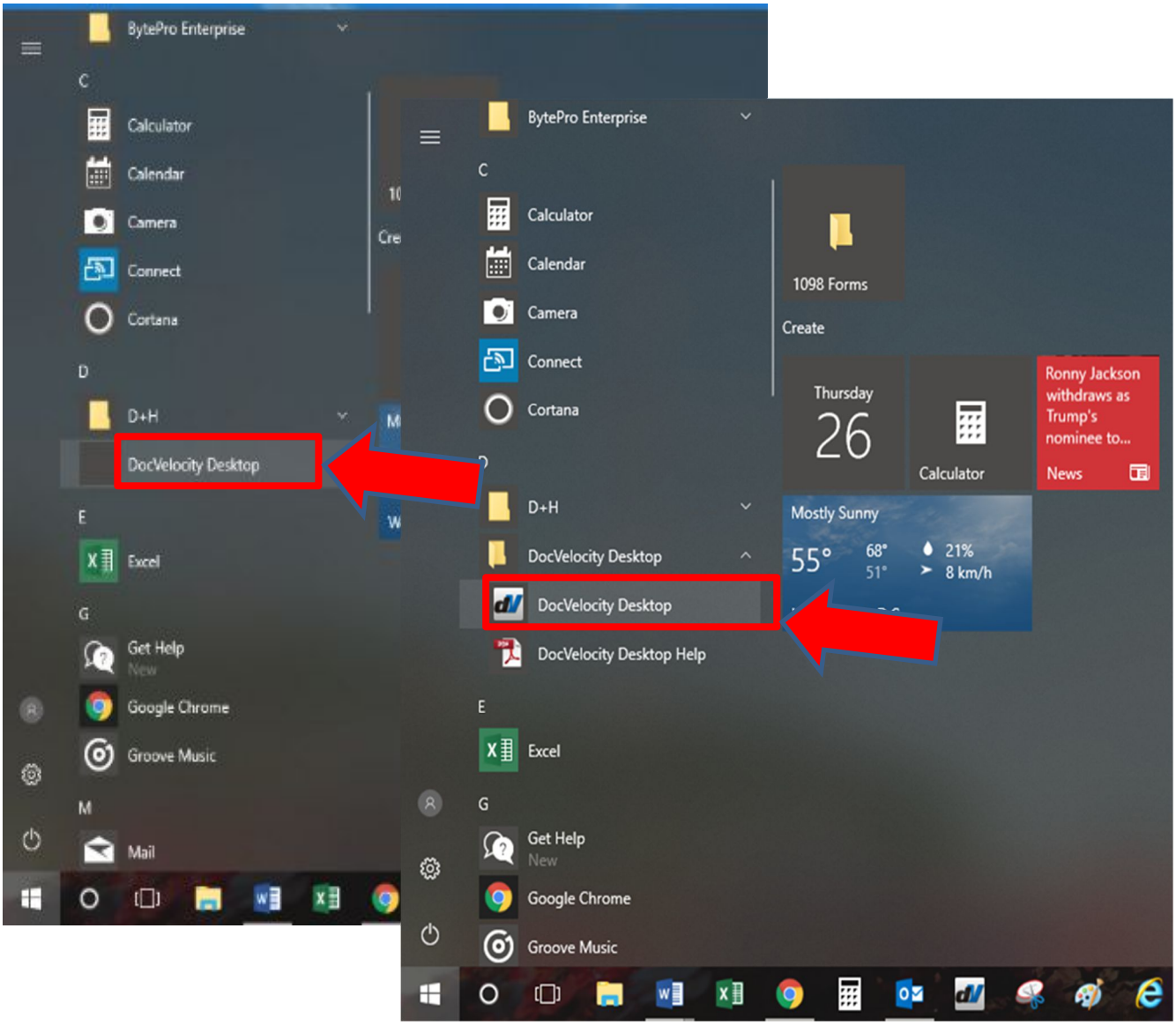
Customer Service Module



In this screen you will **Notate the account.**

Notes are very important and need to be as detailed as possible, regarding the conversation with the borrower.

Customer Service Module

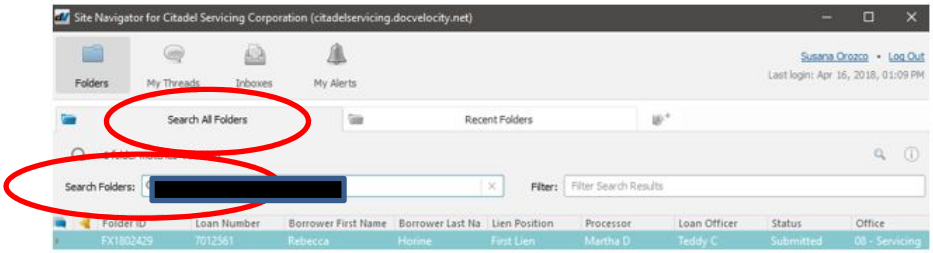


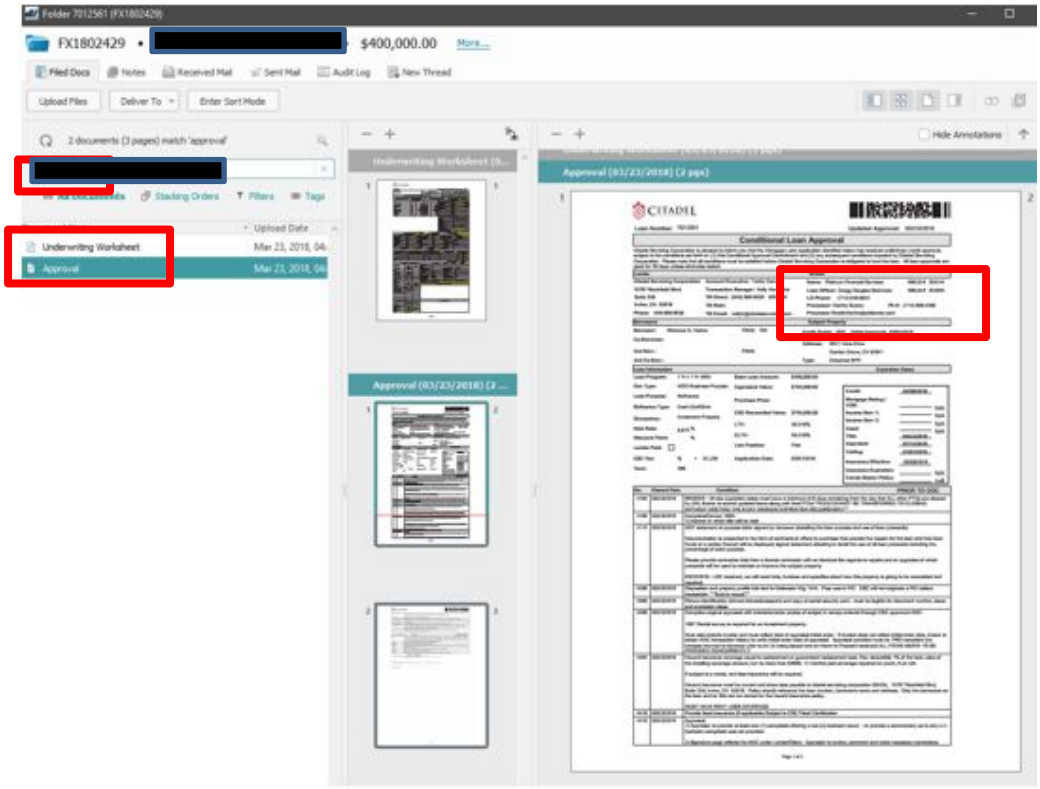
IMPORTANT: If no contact with the borrower on third attempt you will need to locate broker information in DocVelocity from the Start Menu

Customer Service Module

Log into DocVelocity.

Customer Service Module





- Click search all folders
- Type loan number
- Search approval
- Notate broker information in D+H