



CITADEL
SERVICING CORPORATION

Uploading Conditions from Box to Doc Velocity

Updated 01/11/2019

Box notification will be received via email once the Broker has uploaded conditions.

New items were added to 'Andrea Olson Personal'

FileDrop added: ... / Andrea Olson Personal / Andrea Olson Drop

FLDR 7019285-MPUTU (1)

FileDrop added: ... / Andrea Olson Drop / 7019285-MPUTU (1)






PDF conds 4400-appraisal invoice.pdf

PDF conds 4400-appraisal hvcc.pdf

PDF conds 4400-appraisal.pdf

Log into Box and locate PERSONAL folder






All Files ▾

Name	Updated ▾	Size
 Transaction Manager	 Today by Lisa Ramirez	136,150 Files
 Tom Esposito	 Today by FileDrop	1,113 Files
 Andrea Olson Personal	Today by Andrea Olson	1,052 Files








Run the mouse over PERSONAL folder to show “...” on the right hand side of the folder and select.


All Files ▾

Name	Updated ▾	Size	
 Tom Esposito	 Today by FileDrop	1,123 Files	
 Andrea Olson Personal	Today by Andrea Olson	1,052 Files	... Share ▾
 Transaction Manager	 Today by Lisa Ramirez	136,150 Files	

When “...” is selected a drop down will appear. Select “More Actions”.

All Files ▾






Name	Updated ▾	Size	
 Tom Esposito	 Today by FileDrop	1,123 Files	
 Andrea Olson Personal	Today by Andrea Olson	1,052 Files	... Share ▾
 Transaction Manager	 Today by Lisa Ramirez		




- Share
- Download
- Add to Favorites
- Settings
- More Actions
- Integrations

Another drop down will appear. Select “Sync”

All Files ▾

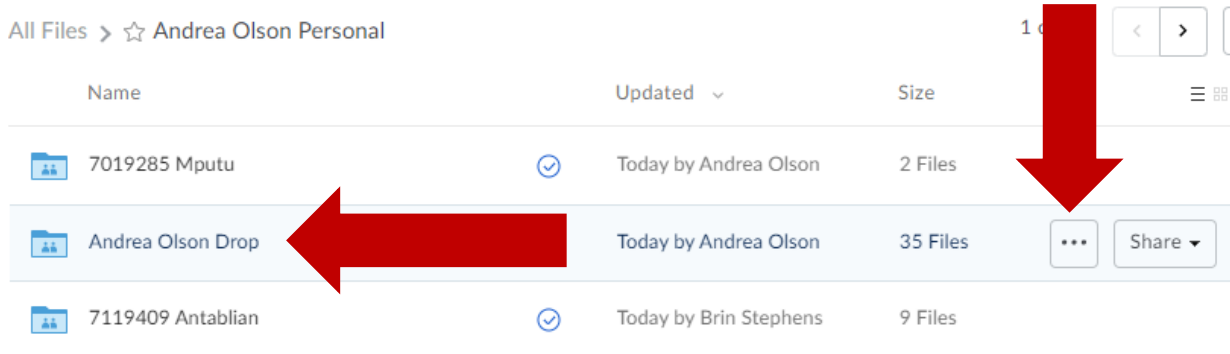
Name	Updated ▾	Size	
 Tom Esposito	 Today by FileDrop	1,123 Files	
 Andrea Olson Personal	Today by Andrea Olson	1,052 Files	... Share ▾
 Transaction Manager	 Today by Lisa Ramirez		



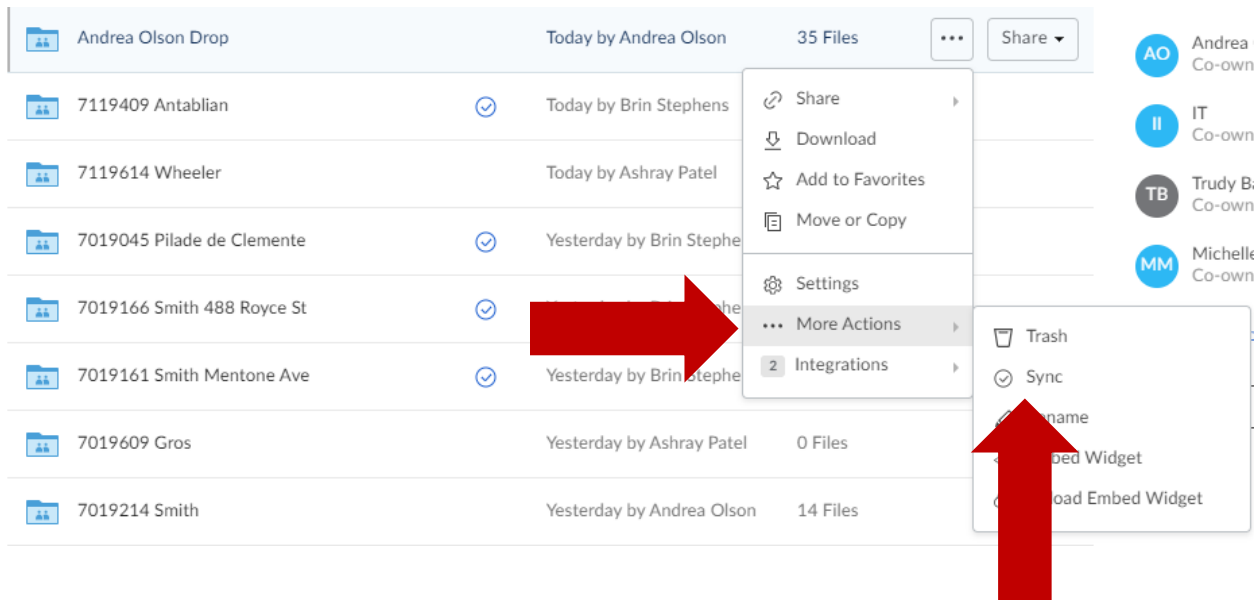
- Share
- Download
- Add to Favorites
- Settings
- More Actions
 - Sync
 - Rename
 - Embed Widget
 - Upload Embed Widget
- Integrations

Once PERSONAL folder is SYNCED select PERSONAL folder to access all files & DROP folder. Locate DROP folder and follow the same steps as above to SYNC the DROP folder to desktop.

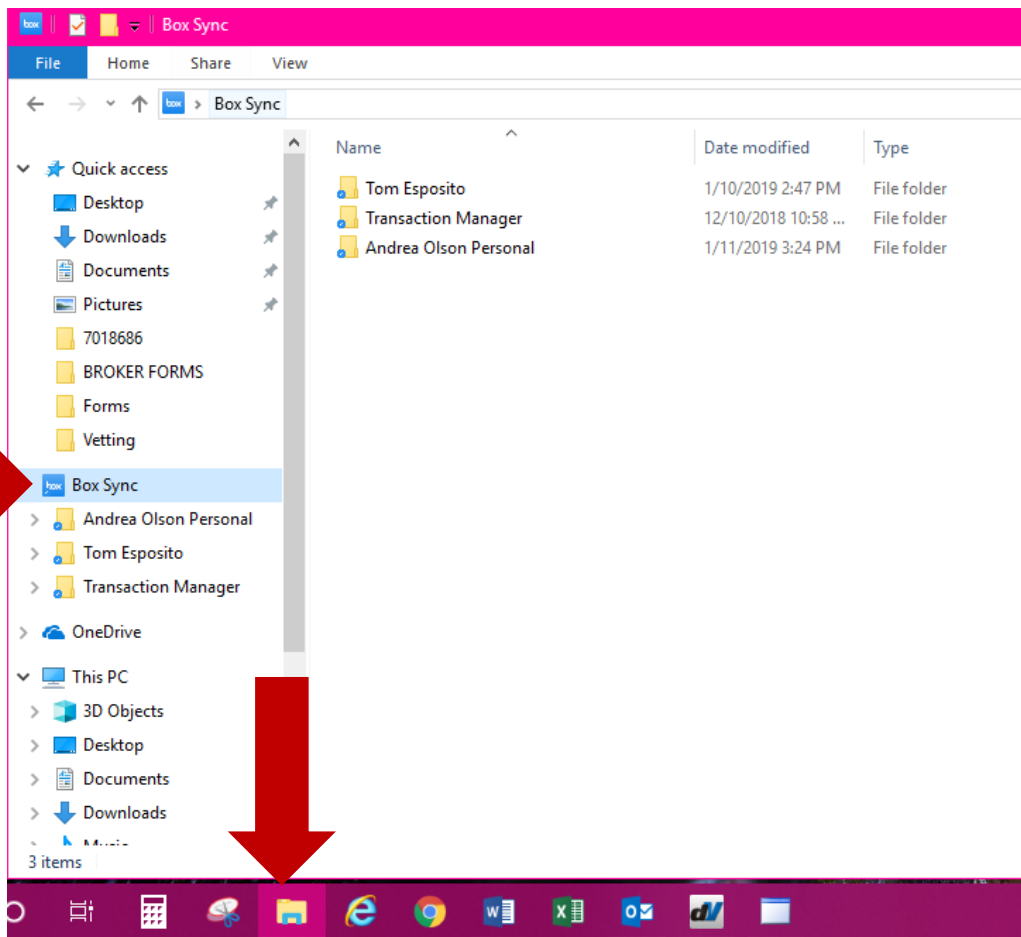
Run the mouse over the folder to show “...” on the right hand side of the folder. Select “...”



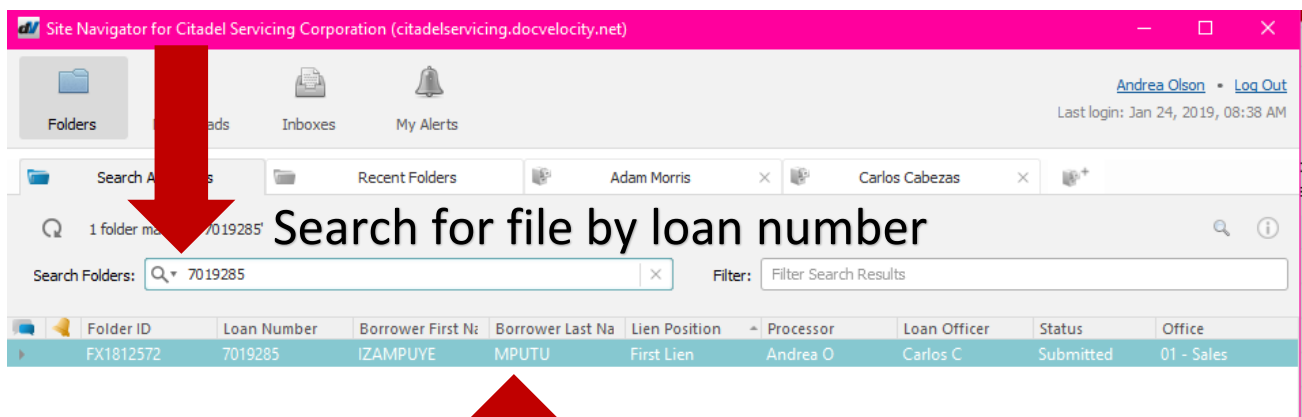
When “...” is selected a drop down will appear. Select “More Actions”. Another Drop down will appear, select “Sync”.



PERSONAL & DROP folder are now SYNCED to desktop. All conditions uploaded to BOX are now accessible from the “File Explorer” folder on desktop.

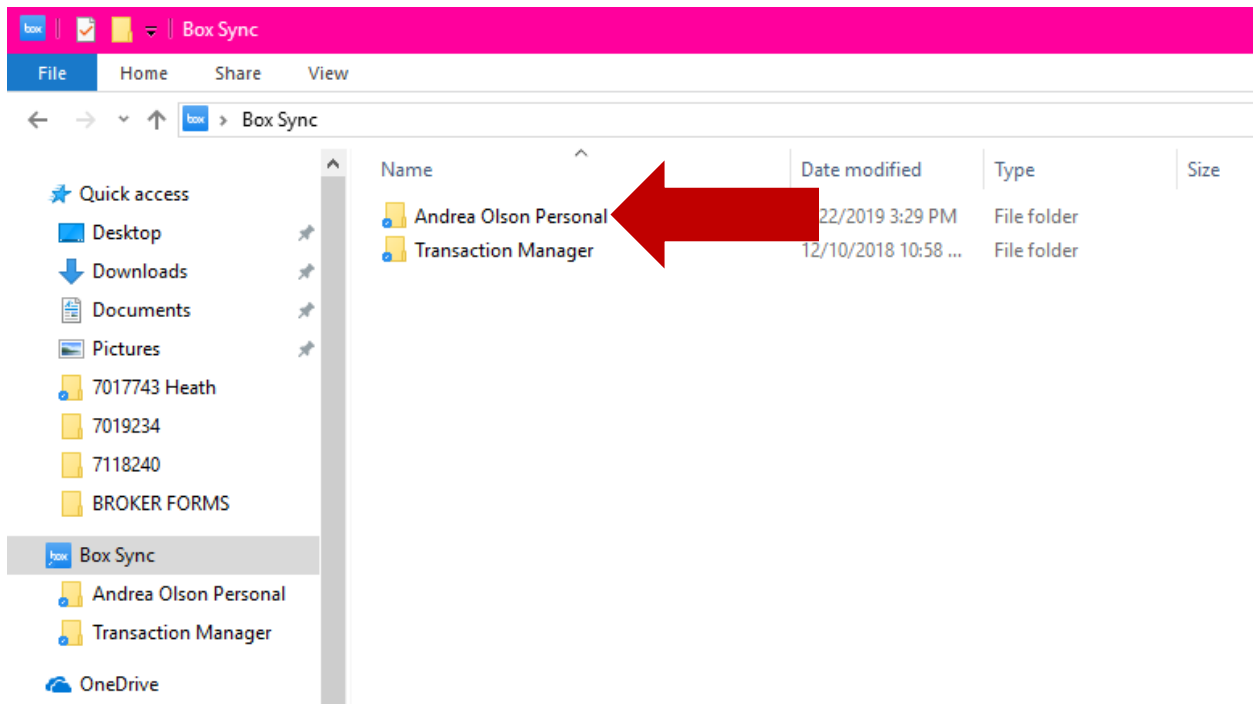


To begin uploading conditions from the BOX folder to Doc Velocity – Open the file in Doc Velocity.

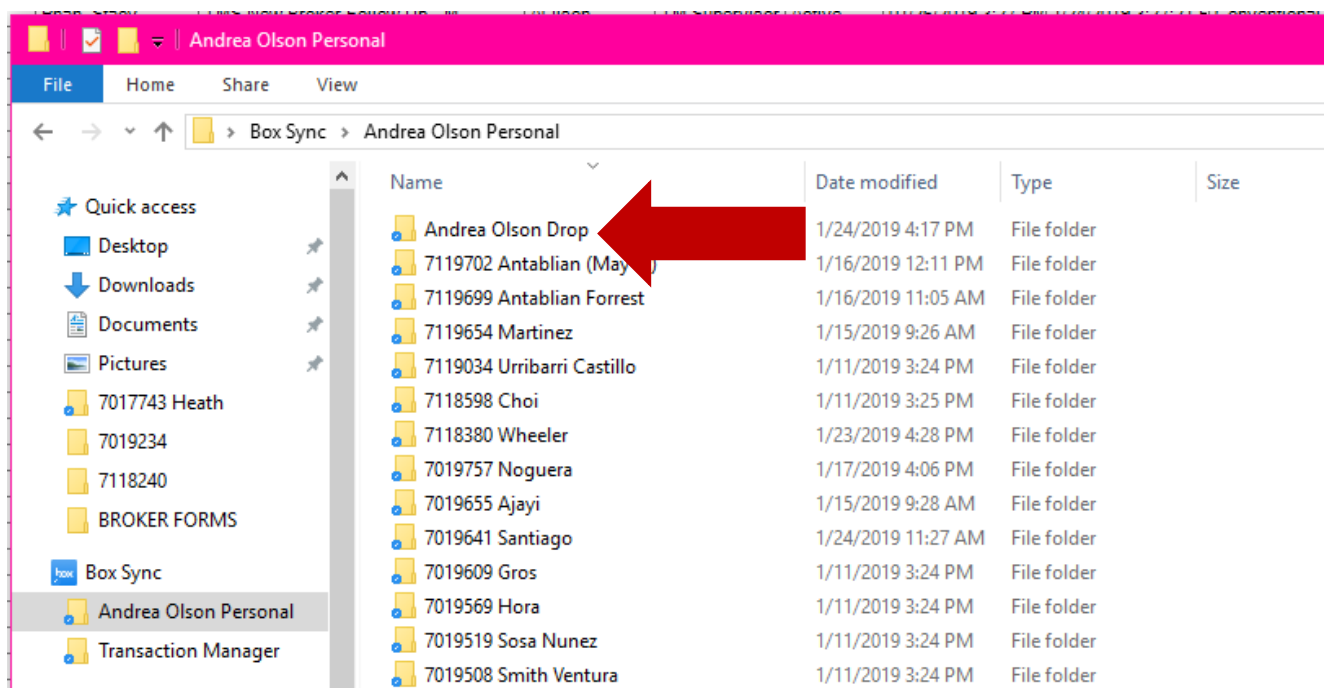


Double click to open file

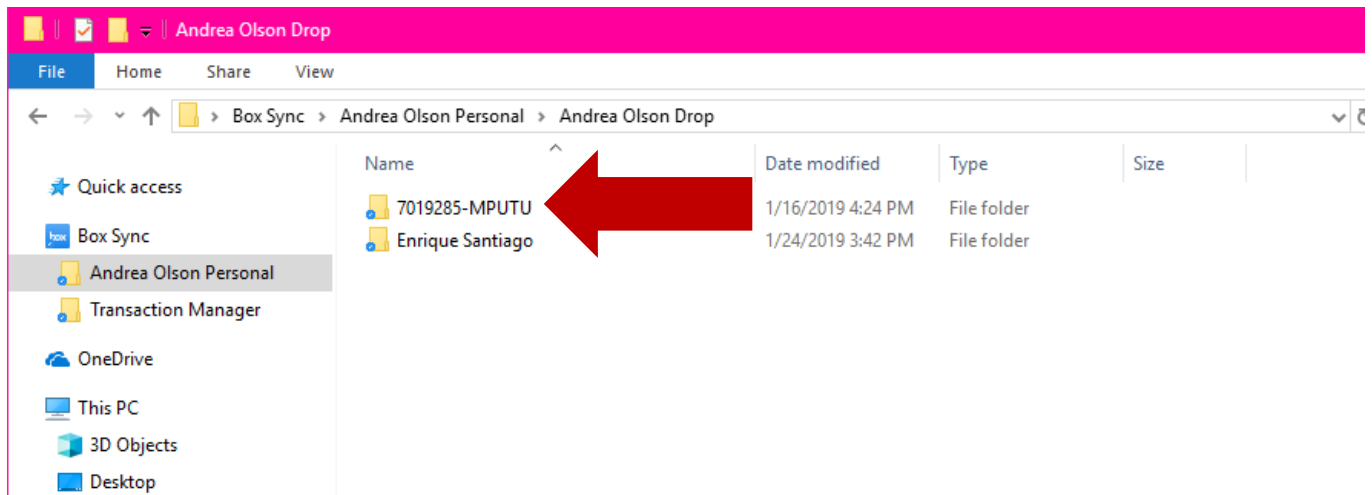
From the “File Explorer” folder open your PERSONAL folder



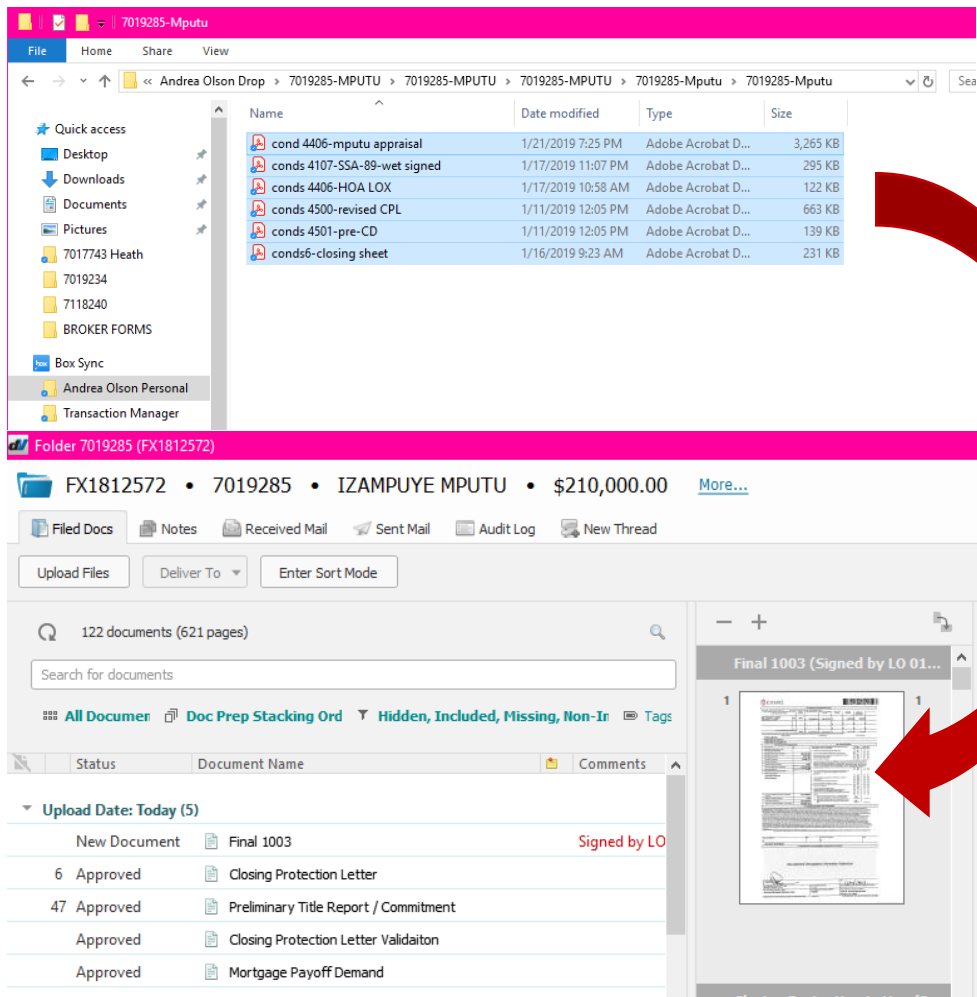
Then locate & open the DROP folder



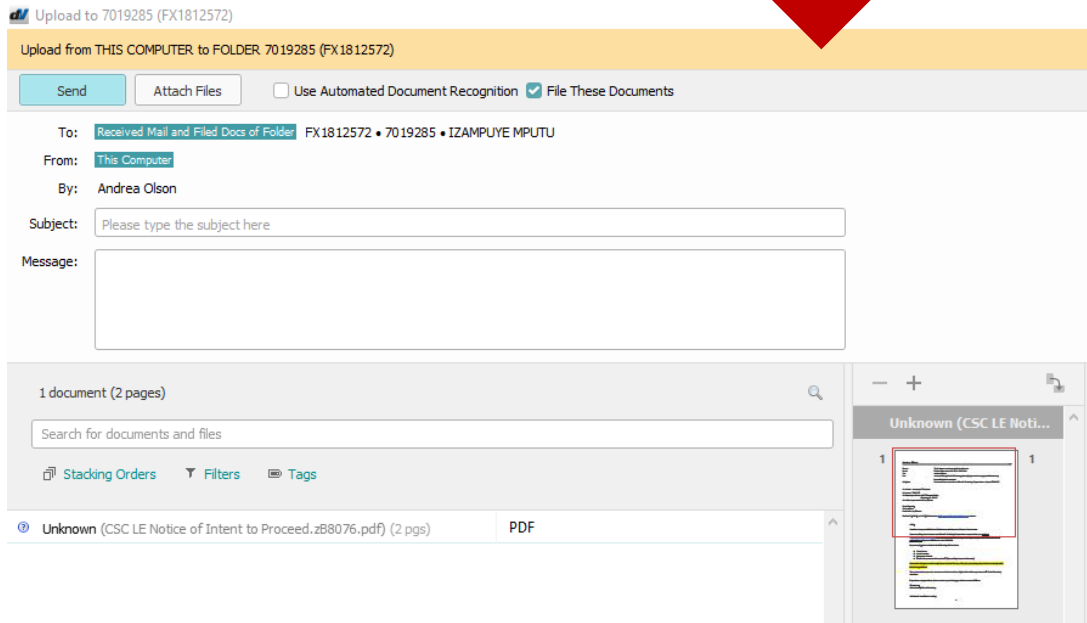
Open the folder for the file with conditions to upload



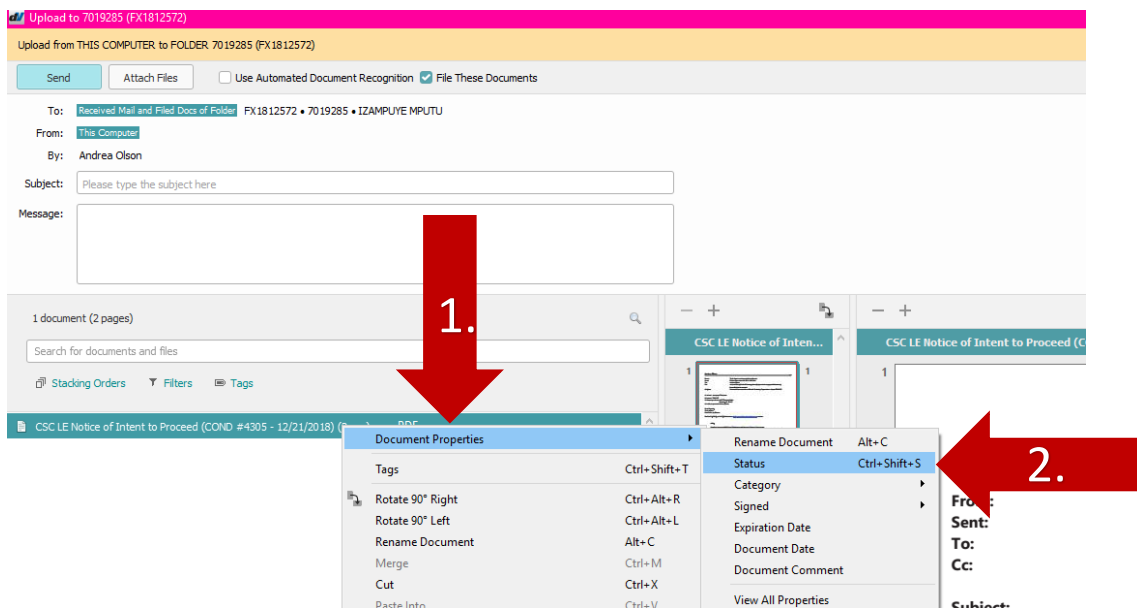
Select ALL conditions in the folder. Drag & drop the conditions into Doc Velocity



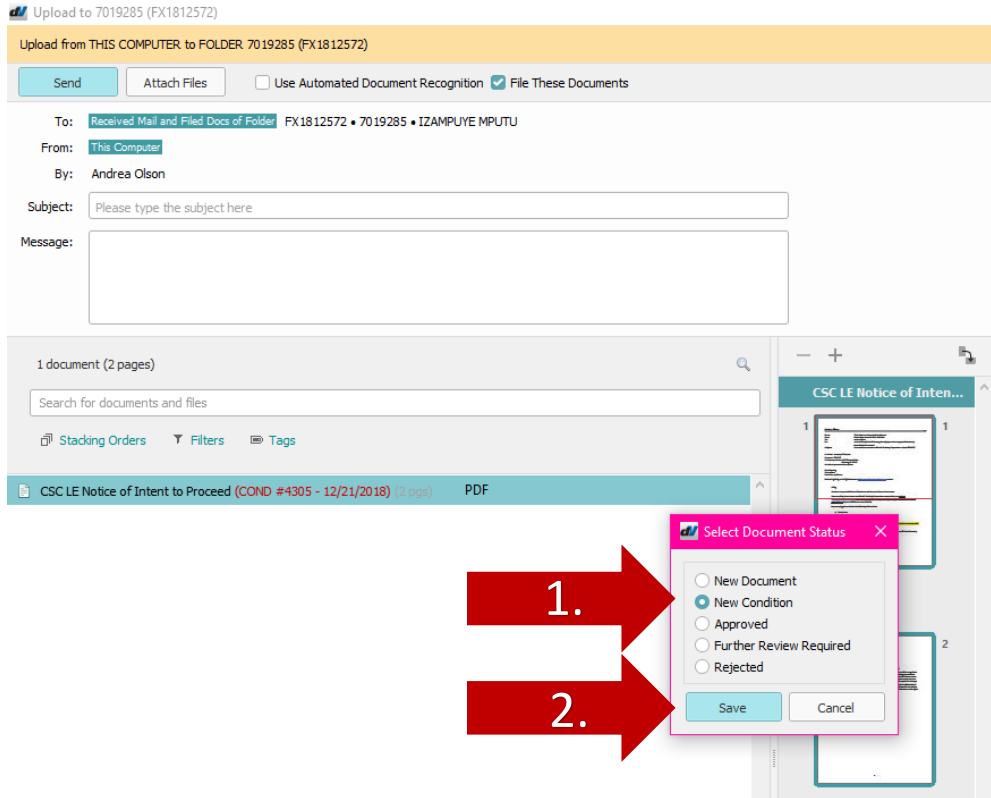
When conditions have been dropped into Doc Velocity, another window will pop up reflecting a yellow band at the top of the screen. This confirms you are in upload mode where you can label the conditions.



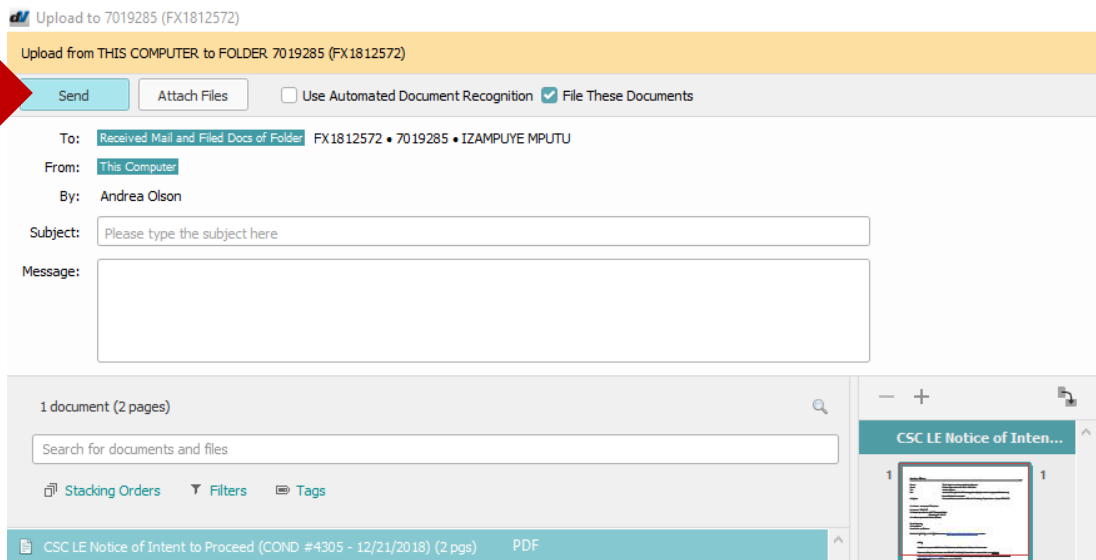
Once conditions are properly labeled in Doc Velocity – Highlight all items and right click. A drop down will appear select “Document Properties” and then select “Status”



“Select Document Status” will pop up. Select “NEW CONDITION” and “SAVE”






Document status is now complete – Select “SEND” at the top left hand corner of the Doc Velocity upload screen. Conditions have been successfully added to the file.



Once the conditions have been uploaded to Doc Velocity – Next step is to move the conditions the Broker uploaded from the DROP folder to the folder created by Loan Set Up. This folder is located in PERSONAL.

Log into BOX and open PERSONAL folder




All Files ▾

Name	Updated ▾	Size
 Transaction Manager	Today by Lisa Ramirez	136,150 Files
 Tom Esposito	Today by FileDrop	1,113 Files
 Andrea Olson Personal	Today by Andrea Olson	1,052 Files

Open DROP folder

All Files > ☆ Andrea Olson Personal

1 of 4

Name	Updated ▾	Size
 Andrea Olson Drop	Today by Andrea Olson	17 Files
 7019285 Mputu	Today by Andrea Olson	22 Files
 7018732 Robayna	Today by Brin Stephens	21 Files



Run the mouse over the folder containing the conditions just uploaded to Doc Velocity in order to select "...". Select "More Actions" and "Unsync".

All Files > Andrea Olson Personal > ☆ Andrea Olson Drop

1. ...

2. More Actions

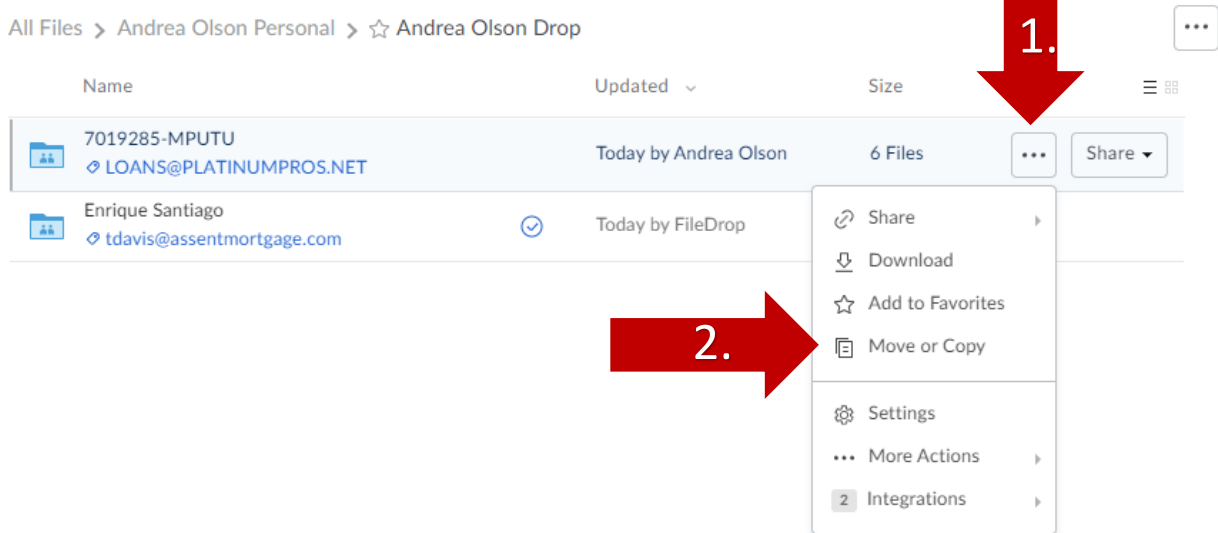
3. Unsync

Name	Updated ▾	Size
 7019285-MPUTU LOANS@PLATINUMPROS.NET	Today by Andrea Olson	6 Files
 Enrique Santiago tdavis@assentmortgage.com	Today by FileDrop	

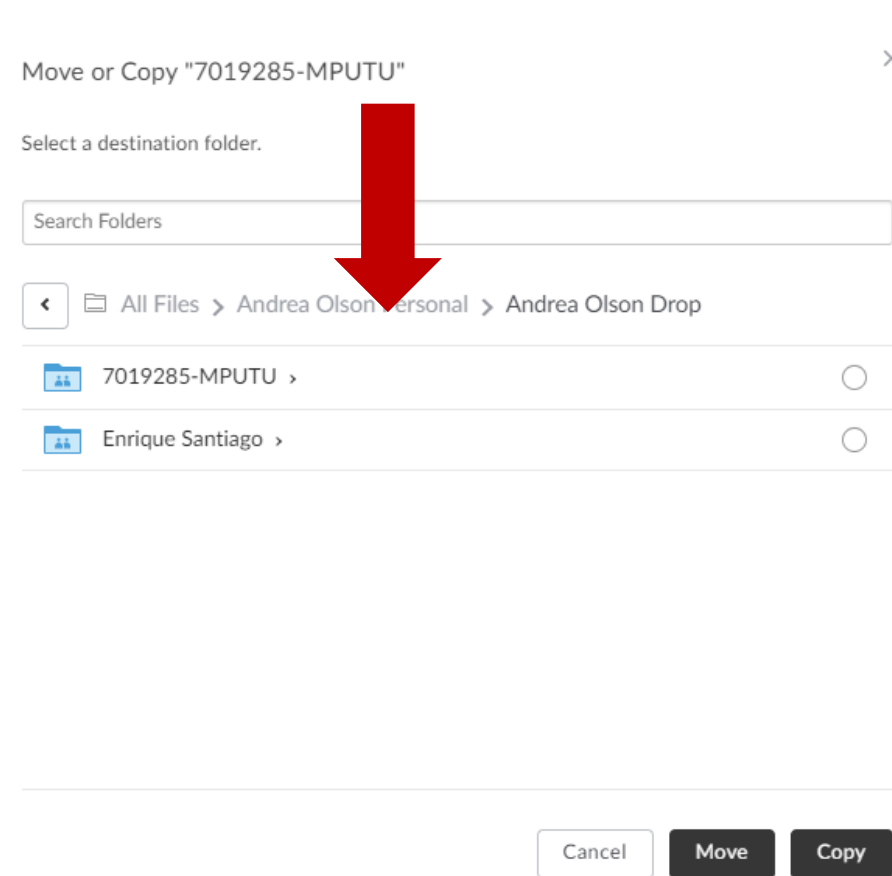
- Share
- Download
- Add to Favorites
- Move or Copy
- Settings
- More Actions
- Integrations

- Trash
- Unsync
- Embed Widget

Once the folder is unsynced, select “...” and “Move or Copy”



A window will pop up – Select PERSONAL folder



Scroll through to find and select the folder reflecting the loan number and last name of the file. Select “Move”.

NOTE – Using the “Search Folders” field is NOT recommended as the folder will NOT stay moved.

Move or Copy "7019285-MPUTU"

Select a destination folder.

< All Files > Andrea Olson Personal

7019214 Smith >

7019234 Straub >

7019272 Lee 2 >

7019285 Mputu >

7019291 Lee >

7019293 Willis >

7019360 Smith >

Cancel

Move

Copy







1.


2.

Once a file has been CLOSED or CANCELLED - These files are to be moved to the TRANSACTION MANAGER folders in BOX.











Log into BOX and open PERSONAL Folder



All Files ▾

Name	Updated ▾	Size
 Transaction Manager	 Today by Lisa Ramirez	136,150 Files
 Tom Esposito	 Today by FileDrop	1,113 Files
 Andrea Olson Personal	 Today by Andrea Olson	1,052 Files



Run the mouse over file that was either CLOSED or CANCELLED, select “...” and “Move or Copy”

 7019360 Smith	 Jan 14, 2019 by Andrea C...	
 7019161 Smith Mentone Ave	Jan 11, 2019 by Andrea C...	
 7019166 Smith 488 Royce St	Jan 10, 2019 by Brin Step...	
 7019609 Gros	 Jan 10, 2019 by Ashray P...	
 7019569 Hora	 Jan 9, 2019 by Ashley Br...	
 7118567 Taborda	Jan 8, 2019 by Brin Steph...	51 Files
 7118240 Ziegler	Jan 8, 2019 by Brin Steph...	22 Files



Share

Download

Add to Favorites

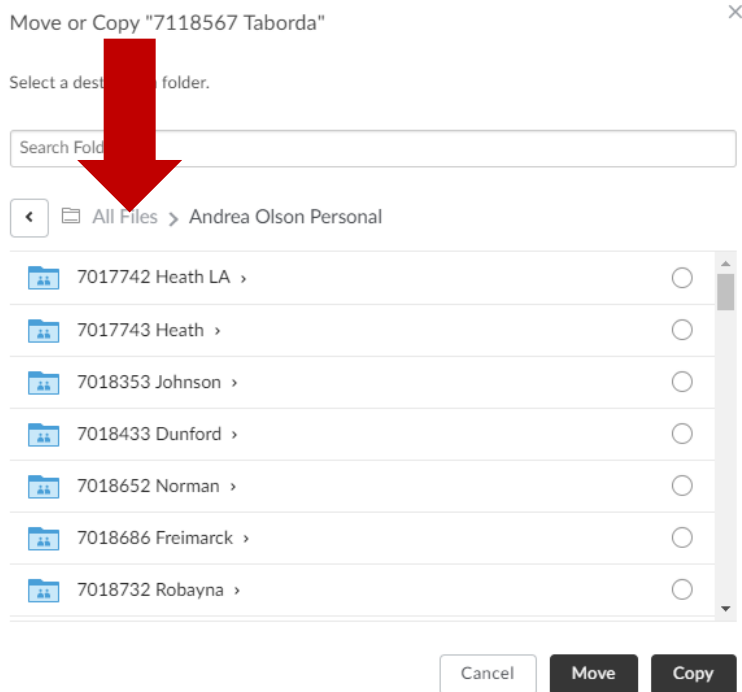
Move or Copy

Settings

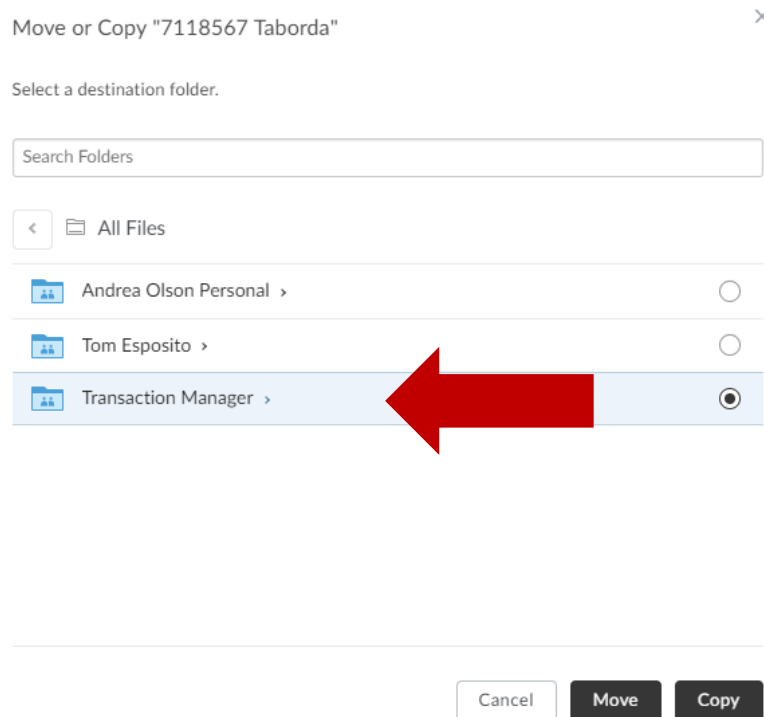
More Actions

Integrations

A window will pop – Select ALL FILES



Select the TRANSACTION MANAGER folder



Select which folder is appropriate for the file that is being moved – CLOSED or CANCELLED and “Move”

