BOX Guide

9/3/2019

CITADEL
SERVICING CORPORATION

Creating a BOX Folder

- Once the Loan has been submitted, welcome letter has been sent out you will need to direct to BOX. Under 'TM – Files In Process' folder look for the TM assigned to the file

Creating a BOX Folder

- Click on the TM's link to enter the sub folders
- On the right-hand corner you will see a button labeled 'New'
- Drop down menu will come up, you will need to select 'Folder'

All Files > TM - Files In Process > ☆ Andrea Olson Personal

1 of 5   ‹ ›   ··· New ▾   Upload ▾

Name ︿	Updated	Size		Sharing	Details
7021698 Mitchell	Jul 10, 2019 by Andrea Olson	39 Files		KG Kyle Gunderlock Owner	

CITADEL
SERVICING CORPORATION

Creating a BOX Folder

- A window will pop up, it will require you to enter a folder name, collaborator to invite & assign the permission
    - Folder name will be the Loan Number with the borrower's last name
    - Invitation will need to go ONLY to the AE
    - Permission needs to be set as 'Previewer'
    - Once complete, review the information entered & click 'Create'