


# box User Guide— Internal Employees



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Name ▾

Submit to Setup

Jeremy Abbott Personal

Jeremy Abbott Drop

7654321 Russell

1234567 Smith

### Folder List


**Submit to Setup** Used for initial submission only. Once your submission package is complete, you will move the folder created for your loan here. *Loan setup will move the file once it has been completed.*

**[Your Name] Personal** Your personal folder within Box to store files to move or copy.

**[Your Name] Drop** Files will appear here when they are uploaded from the CSC website.

**Loan Files** After the submission process, the Transaction Manager will share the file that has been created once a loan number is generated.

## After Submission to Loan Setup



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Submit to Setup

Miranda Refi

Jeremy Abbott Personal

Jeremy Abbott Drop

7654321 Russell

1234567 Smith

**Loan Files:** Once the loan is in process with the Transaction Manager, you can view the files associated with it in the file that is shared with you.

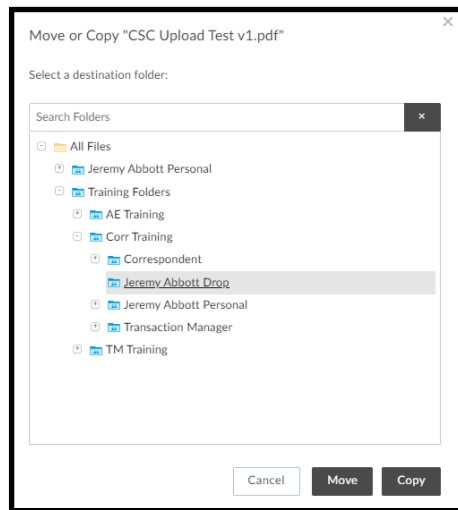
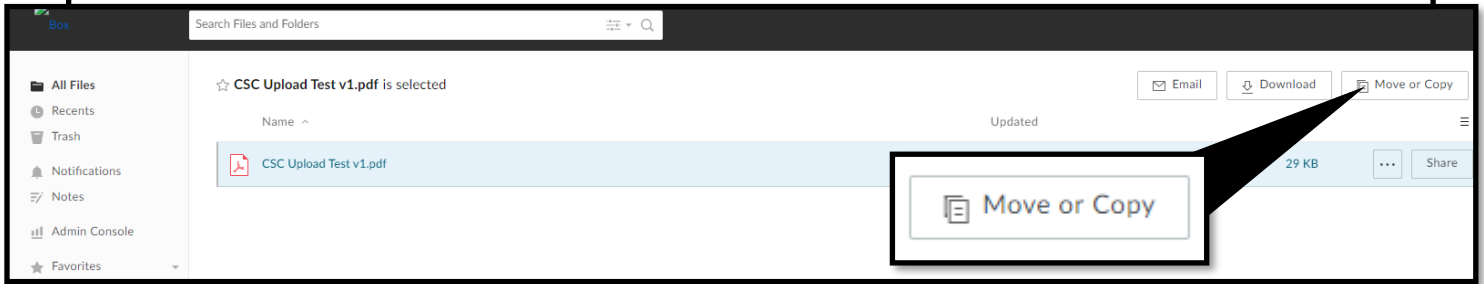
### **Permissions:**

**Account Executives:** AE's will be able to view all files that have been uploaded and also upload files as needed to the folder.

**Third Parties:** Brokers, Loan Officers and Processors from outside CSC will have *upload permissions only*. An email will be sent to them with instructions on how to upload files to Box.

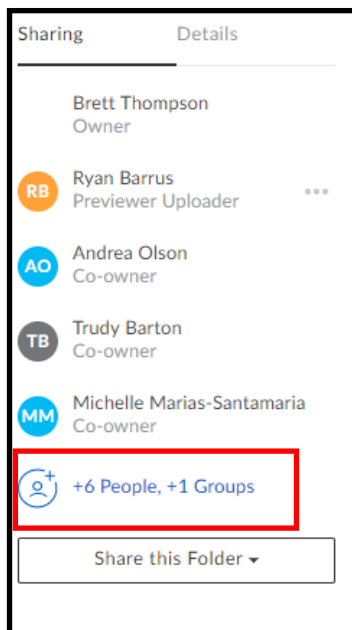
**CSC Website:** Alternatively, Brokers and their associates can still upload via the CSC website. Files will appear your personal drop folder.

**Moving files from the Drop folder:** You will receive notification when a file is uploaded from the CSC website. You can move them by selecting the file(s) and clicking “Move or copy”.



**Select the destination folder to move the dropped file.** If a new folder is needed, you will need to go back and create it in the destination folder.

## Viewing Collaborators



Once inside each file, you can view who has been invited as a collaborator and what positions they have to the specified loan folder.

### Permissions:

**Transaction Managers:** Have full permissions to work within the loan file.

**Account Executives:** AE's can view and upload documents to their loan files.

**Third Parties:** Outside users such as Brokers, Loan Officers and Processors are able to upload only any documents to the loan file, once they have been added as a collaborator by the TM.

**\*\*Make sure you double check that the file you are moving or copying is being moved into the correct file, by verifying the loan number and the borrower last name.\*\***