

Broker Byte Web Broker Upload - Initial Submission Package

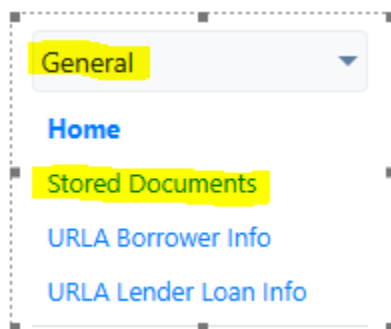
Encourage your brokers to upload prior/or during the Disclosure turntime. We do not need disclosures out and signed before you can upload your file. Remember operations are not receiving any alert when documents are uploaded into the Byte system **at this time**.

Login to Byte Web

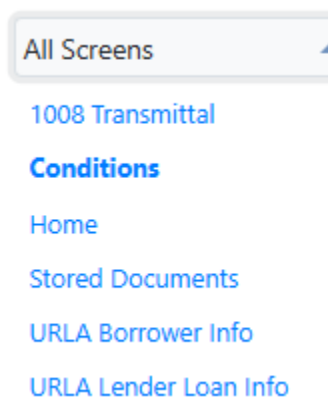
Click Pipeline

Go into your loan –

In the General Tab you will find Stored documents – click on it



In case the Broker can't remember which tab has which screen, have them click All Screens



These are all the screens available for the broker to view.

By Clicking on Stored Documents, Stored document screen will open and click Upload documents:

Stored Documents

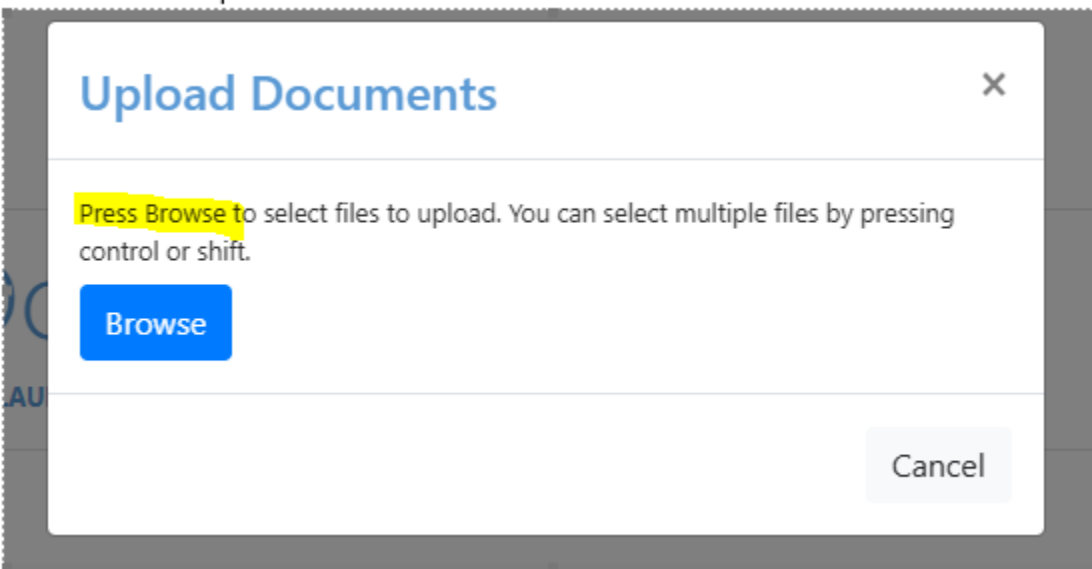
ALT24080031 (Mickael PIERRE CLAUDE BLIN)

Upload Documents

All 00 - FINAL 1008 1003 00 - INITIAL 1003 00 - AUS 00 - APPRAISAL 00 - APPRAISAL MISC 00 - ASSETS 00 - BUILDER DOCS 00 - CREDIT REPORT 00 - CONDO/HOA DOCS 00 - DISCLOSURES 00 - DIVORCE/CHILD SUPPORT 00 - DPA 00 - DOC ORDER 00 - ENTITY DOCS 00 - FHA 00 - FINAL APPROVAL 00 - FLOOD 00 - INCOME 00 - ID 00 - INSURANCE 00 - LE/CD 00 - LOE 00 - MORTGAGE INSURANCE 00 - PAYOFF STATEMENT 00 - POA 00 - RATE LOCK 00 - REO SUBJECT 00 - REO OTHER 00 - SALES CONTRACT/CLOSING 00 - SETTLEMENT STATEMENT 00 - TAX RETURNS 00 - TITLE REPORTS 00 - TRUST 00 - UW MISC 00 - VA ZZ - INVOICES ZZ - PTF CONDITIONS ZZ - EXECUTED LOAN DOCS ZZ - POST CLOSING CONDITIONS ZZ - MI CERT/INSURING ZZ - FINAL CD/SETTLEMENT STMT ZZ - TRAILING DOCS ZZ - COMPLIANCE

Search Hide Inactive Documents ⓘ ☐

		Status	Category	Type	Description	Created
		Not Reviewed			Purchase Agreement (last page has HOA dues info)	8/27/2024 8:25:17 PM



Click Browse and pull in whatever document you want to upload.

Word formats are not acceptable.

.jpg, .gif, .rtf, xml, tiff, pdf, html, pnp and bmp are all accepted formats.

It is best to upload each document individually instead of one large document.

Large documents can't exceed the XX Size limitation and might take too long to upload..

Once the document is shown, it is best practice to Skip the drop down for doc type.
Too many folders to review
Best to leave the categorization to the AM Set UP.

If documents are being emailed to the AE or AE is handling the splitting of the documents; the AE is responsible to upload the documents through Byte Desktop

If AM Set Up is cc'd on the email with the documents, the AE is responsible to upload the documents.

AE to ensure they are not uploading duplicate documents as this slows down review.

AE Must email AM SET UP or AM to let them know items were uploaded.

Remember – no Byte doc Upload alerts are being generated. This will be in Phase 2

Please instruct your broker/loan processor to email you and /or AM when items are uploaded. Byte support is working on the Alert notifications.

Each stored document is assigned a review status. By default, documents uploaded by the broker/AE will be assigned Not Reviewed.

The other statuses are:

- Not Reviewed
- Approved
- Inactive
- Incomplete
- Missing Pages
- Unacceptable
- Duplicate
- Illegible
- Ready to Ship
- Reviewed

The broker can see all that we see in the Stored documents. The only items that will be hidden are the Outside Investor approvals.