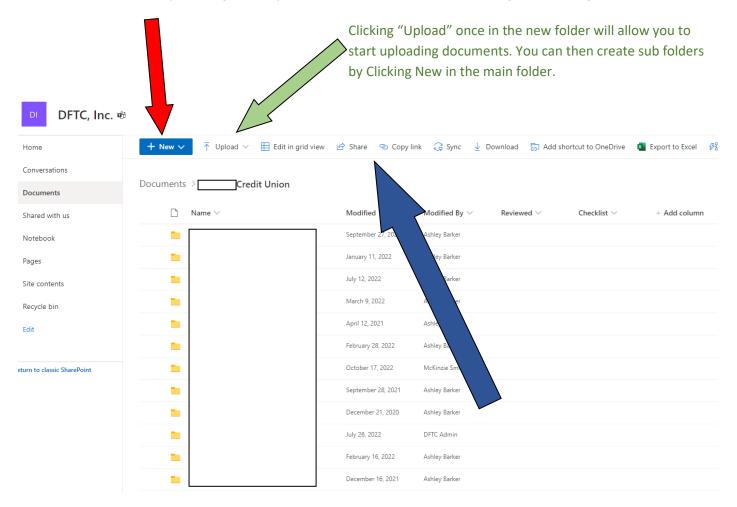Valued Clients,

We have created a set of guidelines for you to follow when transmitting information to our secure server. By following these steps, we can accurately and rapidly identify what information has been transmitted, enabling DFTC to identify any initial information that may be required to complete your request. We continue to strive to improve and streamline our processes to provide you with the highest quality services in a timely manner. Thank you for your assistance in improving the way we work for you.

DFTC, Inc., Management

DFTC, Inc. Upload Guidelines

❖ Scan and save or simply save files individually and name them according to content. Ex. (ABC, LLC 2010 Tax Return, Jane Doe Credit Report, Jane Doe PFS 123110) on your local system. Please make sure that the file name is indicative of what the file contains. Also please include passwords for protected files.

❖ Create a folder labeled for the project request in your CU's folder within SharePoint by clicking the button on the top left of the screen "New".

❖ Create sub folders within the loan file as follows or using your own easy to follow folder structure.

❖ Add all files to created folders by simply clicking the upload files button located in the upper left-hand corner of the folder page that you want the files housed. You can either click "browse" folders to view your system folders and files or click and drag files from your system into the upload window. Once the files are selected, click upload.

❖ Send an email to underwriting via the email address below and let them know of your underwriting request. If you need an appraisal review or environmental assessment, please email the appraisal email group utilizing the email address below. Please note that 2 separate work orders will be needed for underwrites and appraisal reviews respectively and should be sent to:
  o underwriting@dftcinc.com
  o appraisal@dftcinc.com

❖ Contact Aly Sweeney or Omar Shute with any questions or issues.

❖ Please reference the screenshot on next page for more information.

By clicking "New" you can create a new folder and begin uploading files.

Clicking "Upload" once in the new folder will allow you to start uploading documents. You can then create sub folders by Clicking New in the main folder.

DI   DFTC, Inc.

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+ New ⌄   ↑ Upload ⌄   ⊞ Edit in grid view   ↪ Share   🔗 Copy link   🔄 Sync   ↓ Download   📲 Add shortcut to OneDrive   📊 Export to Excel

Documents > ___ Credit Union

🗋	Name ⌄	Modified	Modified By ⌄	Reviewed ⌄	Checklist ⌄	+ Add column
📁		September 27, 20.	Ashley Barker			
📁		January 11, 2022	...ley Barker			
📁		July 12, 2022	...Barker			
📁		March 9, 2022	...er			
📁		April 12, 2021	Ashle...			
📁		February 28, 2022	Ashley B...			
📁		October 17, 2022	McKinzie Sm...			
📁		September 28, 2021	Ashley Barker			
📁		December 21, 2020	Ashley Barker			
📁		July 26, 2022	DFTC Admin			
📁		February 16, 2022	Ashley Barker			
📁		December 16, 2021	Ashley Barker			

Clicking Create link or share will allow you to send DFTC the New Folder for easy access. You can also share the folder with others that already have access to SharePoint.