Portal Guide:

Glide – Exceptions Training – Loan Officer

Citadel Servicing Corporation dba Acra Lending

Exceptions Training – Loan Officer

1. Log in to Glide using your Okta portal.
2. The system will navigate to your account's individual "Pipeline" page.
3. From any page in Glide, click the "Quick Pricer" tab on the lefthand side menu.
4. Select the occupancy type.
5. Select the loan type if Non-Owner Occupied was selected in the previous step.
6. Fill out all required and relevant fields with all necessary information.
    a. Note: To save the entered data to your "Price Scenario" tab to resume later, click the "Save Scenario" button.
7. Click the "Generate Quick Quote" button to navigate to the list of approved and rejected products for the entered set of terms.
8. Click into the rejected product you would like to request an exception for to open a corresponding detail panel with reasons for rejection.
9. Click the "Request Exception" button in the open detail panel to load a fillable "Remarks" textbox.
10. Enter relevant comments regarding the exception request for this particular product, then click the "Request Exception" button.
11. After the "A New Exception is created" success message appears on screen, navigate to the "Exceptions" tab to view the status of the request.
12. Monitor the "Exceptions" tab for change in status.
    a. If the "Status" changes to "On Hold/Clarification", review and assist with resolving any required clarifications. Repeat process as needed.
    b. If the "Status" changes to "Deny", the exceptions request has been rejected and no further action is taken.
    c. If the "Status" changes to "Approved", the exceptions request has been approved. Continue with step 13.
13. Click the "Click here to Re-Price" button in the corresponding "Action" column to open the pricing page.
14. The system will display a list of approved products for the entered set of terms.
15. Click the appropriate scenario from the listed options to open a Price Adjustment detail panel.
16. Click the "Create Application" button to display fillable detail fields.
17. Fill in all required and relevant data fields, then click the "Create Application" button again.
18. The system will navigate to the "New Loan Creation" screen.
19. Proceed with the standard application creation process.