



**Prudent AI Guide:**

Broker

Citadel Servicing Corporation dba Acra Lending

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## Broker Process

1. Log in to Glide and navigate to the “Income Analysis” tab.
  2. Click the “Start New Analysis” button.
  3. Fill out all relevant and required fields on the “Business Narrative” screen, then click the “Next Step” button.
  4. Select the appropriate “Income Period” option.
  5. Upload the corresponding bank statement PDFs by either clicking into the “Bank Statements” section or dragging and dropping the files directly from your desktop.
  6. Once all the files have been uploaded, click the “Create” button.
  7. The system will navigate back to the “Income Analysis” tab, and the newly created batch will appear in the “All Uploaded Batches” table.
  8. When you receive notification that the submitted batch status has changed, navigate to the “Income Analysis” tab in Glide and locate the corresponding “Status” column for the affected batch in the “All Uploaded Batches” table.
    - a. If the status is “Processed”, the batch is being reviewed by the Income Desk. Wait for notification that the batch has been completed, rejected, or needs additional action.
    - b. If the status is “On Hold (Missing Files)”, click the corresponding “Unique ID” number to upload additional and/or relevant files to the “Bank Statements” section as needed. Once uploaded, return to the beginning of Step 8.
    - c. If the status is “Completed”, view the “Analysis Summary” by clicking the corresponding “Unique ID” number. To create a loan application directly from completed batch, click the corresponding “Create Application” button in the “Report” column on the “All Uploaded Batches” table.
    - d. If the status is “Rejected”, the batch has been rejected and any new submissions must be submitted via the “Start New Analysis” button.
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Version Control Grid

| Version | Edits                    | Editor | Date     |
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