Contents (press F9 to update)

Introduction

Celink will be using a new workflow tool for all incoming Client Requests. This tool will allow Clients to submit requests through a simple form, see updates along the way, and allow for communication directly at the request level.

As a note- Chrome Web Browser works best with this application.

Note- Please advise your IT Department that emails will come from support@celink.zendesk.com so that any Privacy Triggers can be updated to allow the emails.
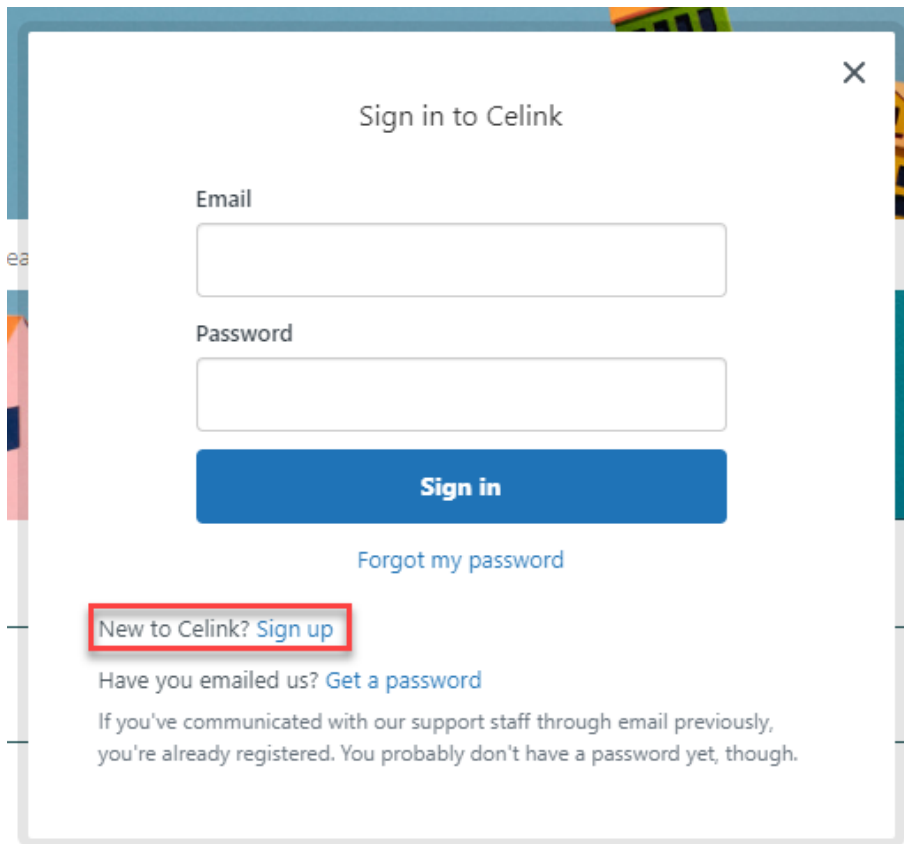
How to create an account

This section will outline the steps taken to create a new user account. You must have an account set up to be able to submit tickets to Celink.

1. Log into https://celink.zendesk.com/hc/en-us

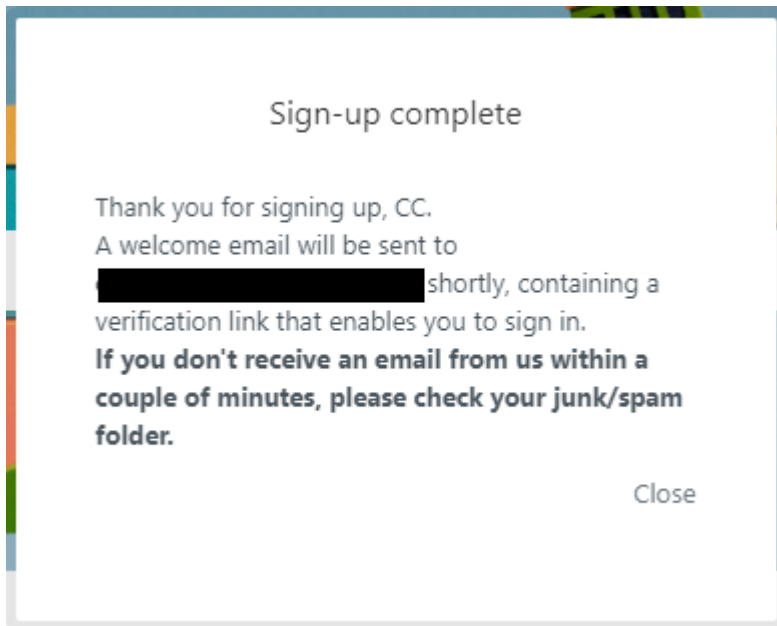2. Go to Sign In
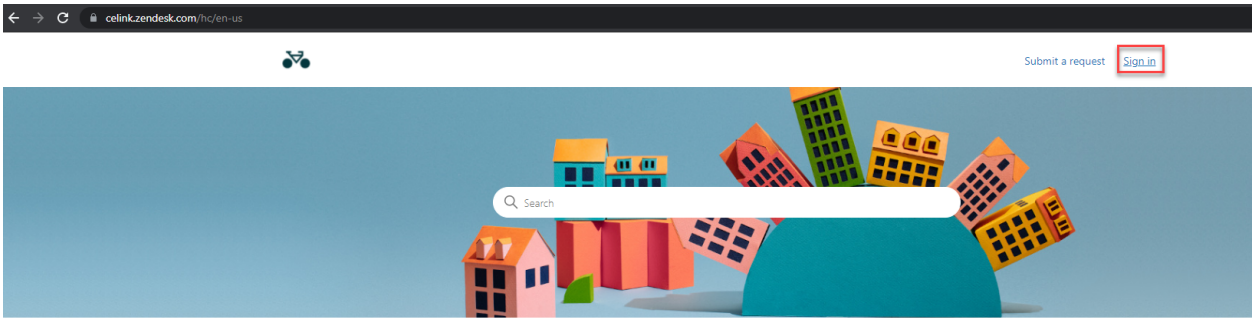
3. Select New to Celink? Sign up
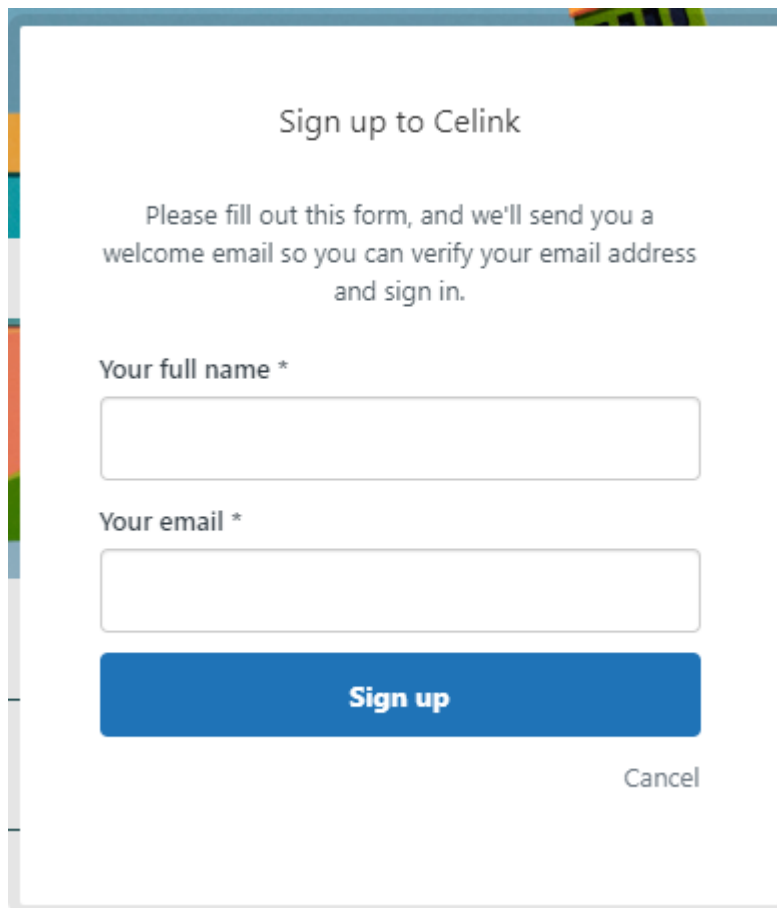
4. Fill out Your full name and Your email boxes
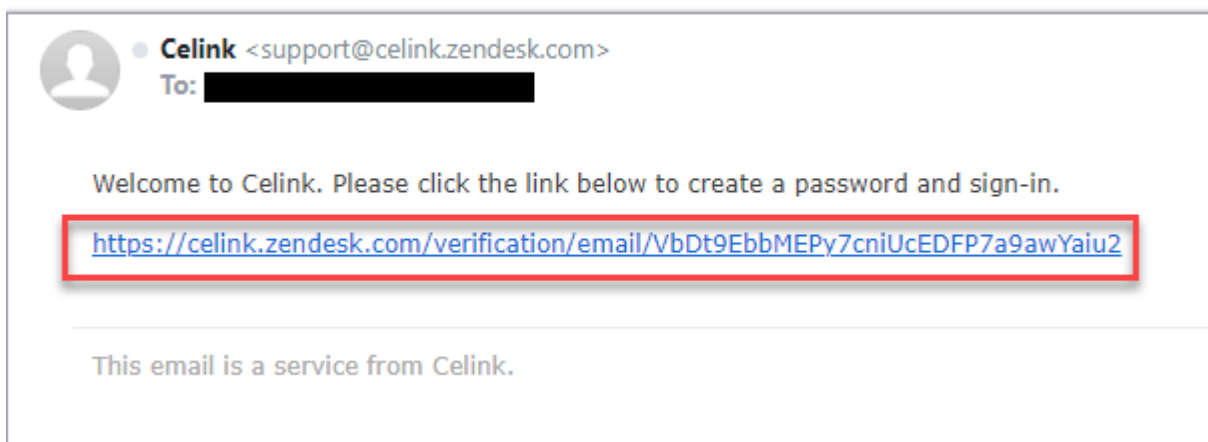
5. Sign-up complete message should appear

6. Go to email account and select hyperlink to continue setting up account

7. Set up Your name and Your password. Please keep your information private as you will need to use this to sign in to make and track requests. Passwords do have the below requirements:

- Must be different than the previous 5 passwords
- Must be at least 6 characters
- Must include a number, and a character that is not a letter or a number
- Must include letters in mixed case and numbers
- Expires after 90 days
- 10 attempts allowed before lockout
- Must be different from email address

How to sign into your account

This section will outline the steps taken to sign into your account. You must be signed into your account to submit and track requests.

1. Log into https://celink.zendesk.com/hc/en-us
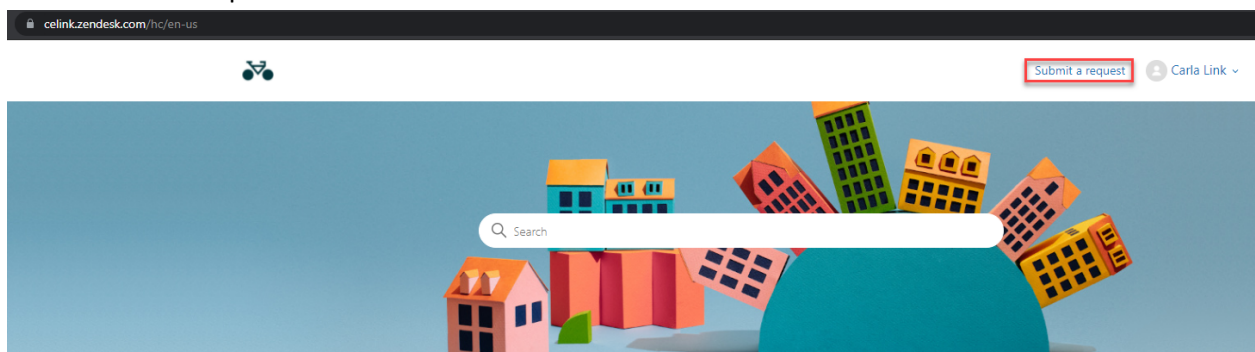2. Select Sign in
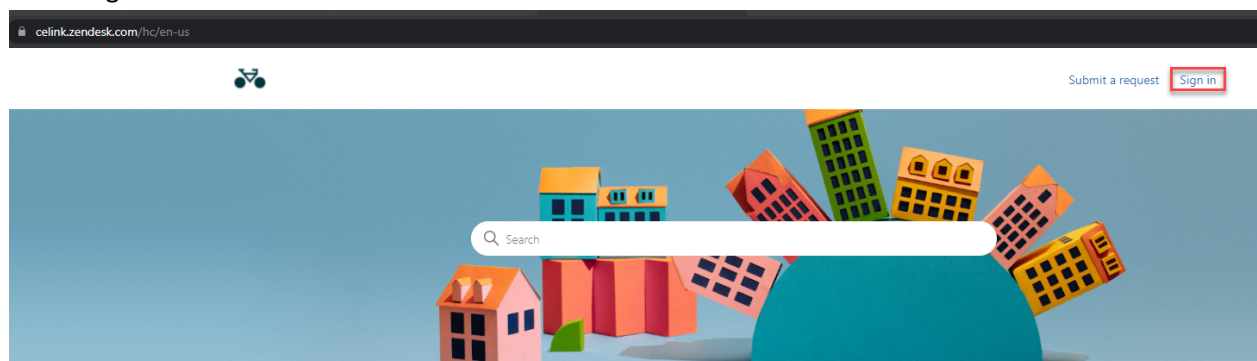
3. Enter Email and Password
4. You are now signed in
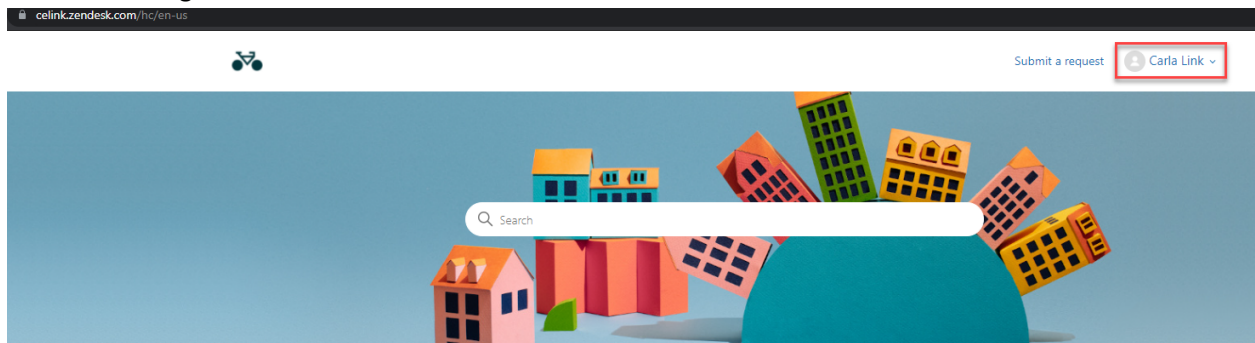
How to submit a request

This section will outline how to create a Request. You must be signed into your account to submit a request.

1. Log into https://celink.zendesk.com/hc/en-us
2. Select Submit a request

3. Select Process Name which will then send to a Sub-Process option to select

Submit a request

Process Name

-	▲
BC Admin & Request Processing	▶
Call Center (BC & DAD), Repairs & Loss Drafts	▶
Client Relations, Escalations & Compliance/Regulatory	▶
Early Default, Maturities, Extensions, SS, DIL, NBS	▶
Late Default, Foreclosure, Prop Pres & HOA	▼

Process Name

Back	◀ ▲
Direct Deposit / ACH Setup	
Document Review	
Line of Credit Draws	
Payment Plan Changes	
Payoff Quotes	▼

4. Select Request Type

Request Type Direct Deposit / ACH Setup

-
Rush Direct Deposit Setup
Rush Direct Deposit Change to existing account
General Inquiry

5. Enter Request Information. Then Hit Submit. A few HELPFUL REMINDERS:
   - Please use Celink Loan Number when possible.
   - Subject Line should be as specific as possible- it is okay to add the loan number again in the subject.

Process Name

Direct Deposit / ACH Setup ▾

Please Select One

Request Type Direct Deposit / ACH Setup

Rush Direct Deposit Setup ▾

Celink Loan Number (optional)

789456123

Please include Celink loan number(s) if possible.

Subject

Need Direct Deposit Setup ASAP

Description

T   B   *I* | ☰   ☰ | ▣   🔗   🖼   ❞

Direct Deposit was not set up at closing. Need it to be set up in order to receive funds ASAP.
Thanks

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Attachments (optional)

Add file or drop files here

Submit

6. Receive verification that the request has been successfully submitted, along with details of the request. An Email will also be sent showing request has been submitted along with the Request ID. If you wish to not receive the emails in your inbox, and manage requests from your account, you can create a rule in your Email inbox to send requests to a specified folder. Please follow you company policy on creating email rules.

How to view request history

This section will outline the steps take to view your Request History.

1. Log into https://celink.zendesk.com/hc/en-us
2. Sign in to your account (instructions under "How to sign into your account")
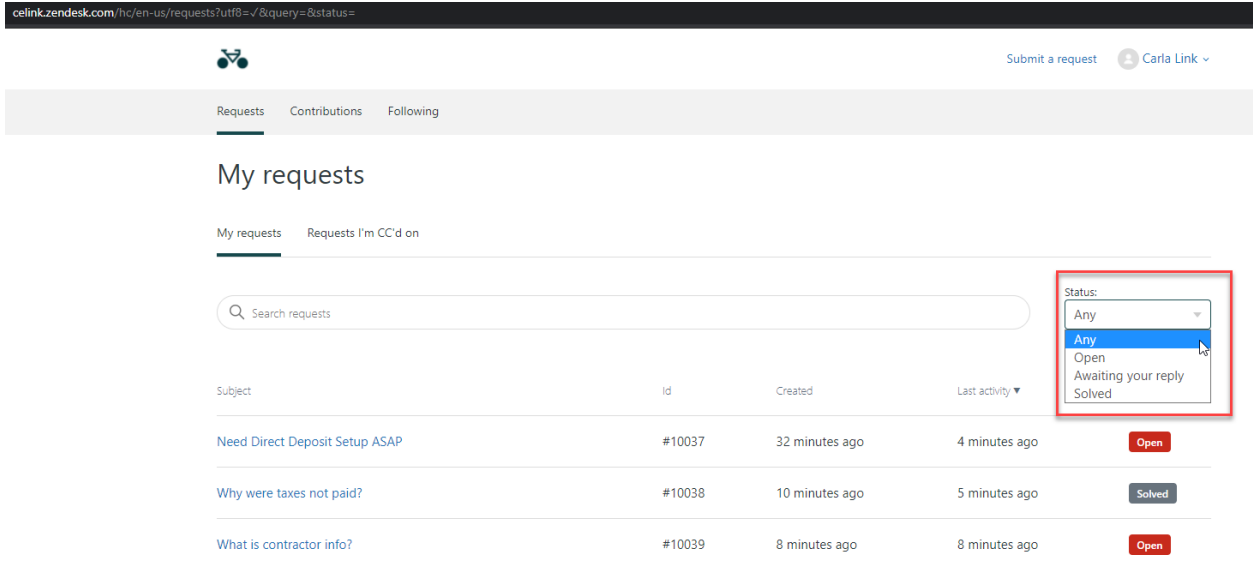3. Select your profile and My activities

4. My activities will show you all items you have requested. If you want to filter to only see Open Requests or ones Awaiting your reply, you can do so under "Status:" It will default to all statuses.

5. If you wish to look at a specific request, just open the request from the Subject and it will take you into the specific Request ID

6. If you need to add extra information to the request, you can go to "Add Conversation" and type any additional information you may have.

Celink > My activities

Why were taxes not paid?

Carla Link
27 minutes ago

For: 1111111, 222222, 333333, please advise why taxes were not paid.

Celink Support
23 minutes ago

Taxes are due by 10/1/21. Will be paid before due date. In queue to be paid by 9/27/21.

T	B	I	☰	☰	🖼	🔗	🖼	99

We still need 1111111 paid by 9/15/21.

Add file or drop files here

[Submit]

Requester	Carla Link
Created	Today at 10:08
Last activity	Today at 10:12
Assigned to	
Id	#10038
Status	Solved
Priority	Normal
Process Name	Client Relations, Escalations & Compliance/Regulatory > Client Relations
Request Type T&I Default and Monitoring Escalations - Client Requests	Delinquent Tax inquiries
Celink Loan Number	1111111, 222222, 333333

Submit a request   Carla Link

✓ Your reply was successfully added.   ✕

Requests   Contributions   Following

Celink > My activities

Why were taxes not paid?

Carla Link
31 minutes ago

For: 1111111, 222222, 333333, please advise why taxes were not paid.

Celink Support
27 minutes ago

Taxes are due by 10/1/21. Will be paid before due date. In queue to be paid by 9/27/21.

Carla Link
a few seconds ago

We still need 1111111 paid by 9/15/21.

Add to conversation

Mark as solved

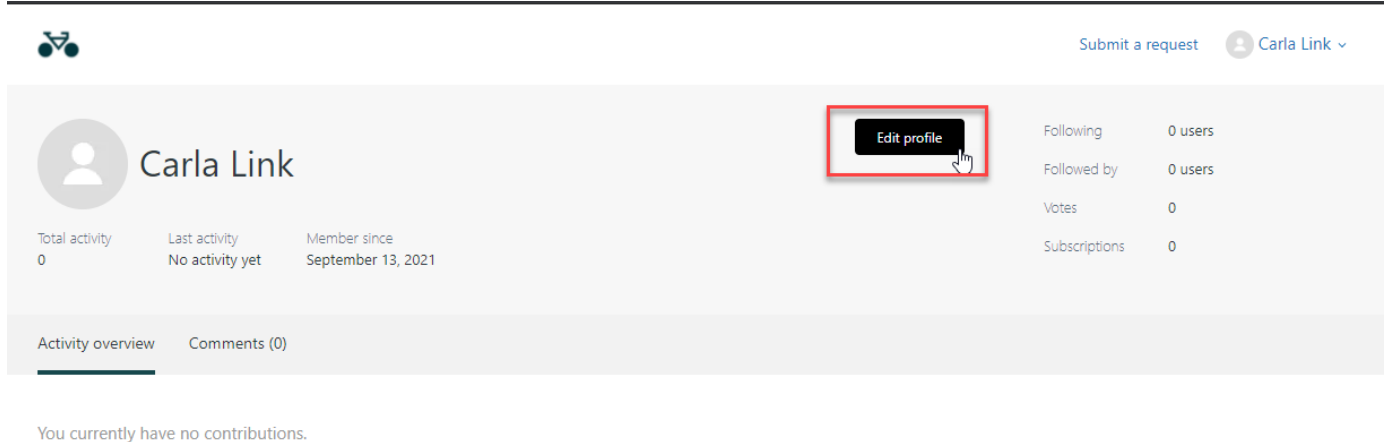| Requester	Carla Link
Created	Today at 10:08
Last activity	Today at 10:39
Assigned to	
Id	#10038
Status	Open
Priority	Normal
Process Name	Client Relations, Escalations & Compliance/Regulatory > Client Relations
Request Type T&I Default and Monitoring Escalations - Client Requests	Delinquent Tax inquiries
Celink Loan Number	1111111, 222222, 333333

How to manage your user profile

This section will outline steps taken to manage your user profile.

1. Log into https://celink.zendesk.com/hc/en-us
2. Sign in to your account (instructions under "How to sign into your account")

3. Select your profile and My profile
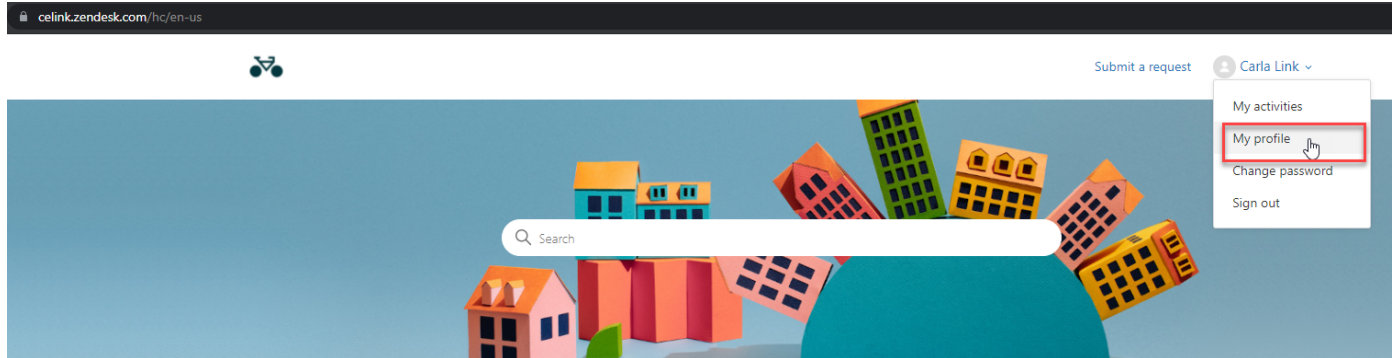
4. Select Edit profile

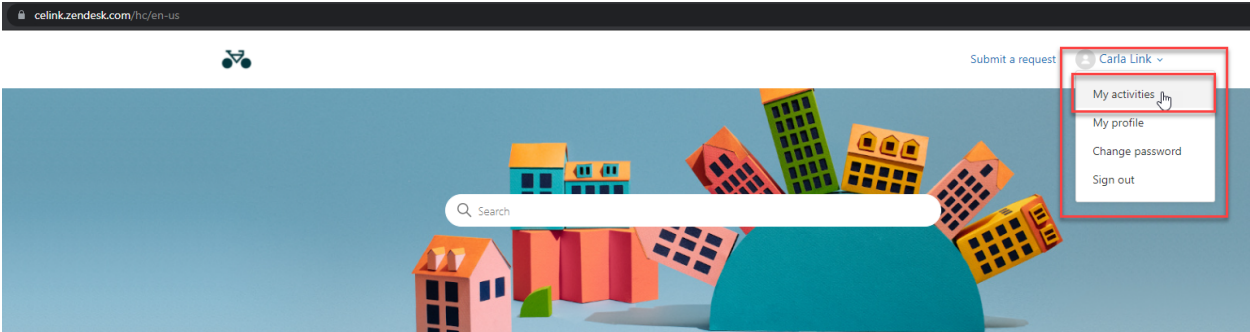5. Fill out or update information into form and select OK.

6. Information will show updated on your profile

How to close a request or add additional comments once request has been created

This section will outline steps to take to add additional comments to an open request.

1. Log into https://celink.zendesk.com/hc/en-us
2. Sign in to your account (instructions under "How to sign into your account")
3. Select your profile and My activities

4. Open the request that you wish to update comments on. Fill out section "Add to conversation"

5. Fill out the comments and hit submit. This will be visibile by Celink. If the ticket is already in Solved Status, it will reset the status to Open so that Celink is aware as well.

How to manage requests pending your feedback

This section outlines steps taken to identify requests that are pending feedback from the requestor and how to update the request.

1. Log into https://celink.zendesk.com/hc/en-us
2. Sign in to your account (instructions under "How to sign into your account")
3. Select your profile and My activities
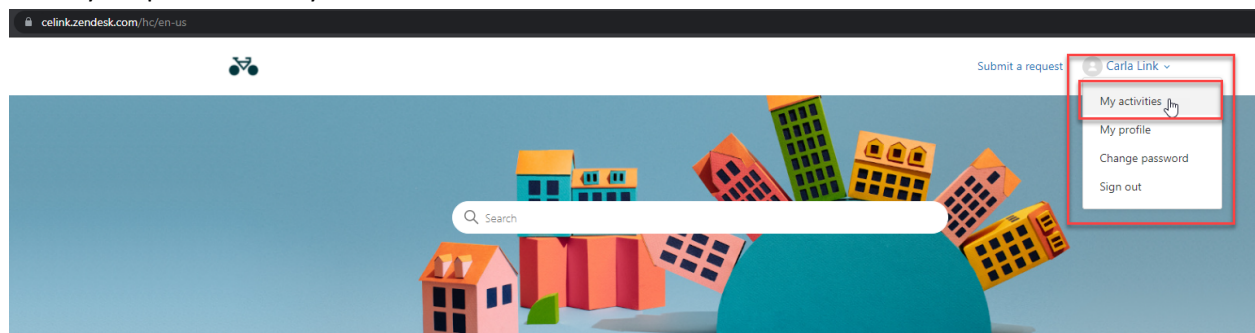
4. My activities will show you all items you have requested. From this view, you can see the current status of each request. If the Status indicates "Awaiting your reply", Celink needs more information from you.

5. To provide an update and get the status moved back to Celink, open the request.
6. Go to Add to conversation

7. Fill out comments and select Mark as solved. This will return the status to Open

Understand each ticket status

This section explains how each status on the ticket is interpreted

- **Open:** request has been assigned to a resource at Celink
- **Awaiting your reply**: request is awaiting Client feedback
- **Solved:** request has been completed by Celink and is submitted back to the Client. The ticket will automatically move to "Closed" after (3 Business Days). If the Client does not agree the issue is solved, they can update the comments and the ticket will automatically move to an Open status and back with Celink.

Tips and Tricks (helpful reminders)

This section outlines some helpful reminders, tips and tricks.

- Use Chrome to log in
- When filling out a request, use the Celink Loan Number when possible
- Be specific in your subject line (it is okay to add the loan number again to the subject line)
- Do not respond to tickets that are "Solved", even to say thank you, unless the response did not satisfy the inquiry
- If you do not see a topic listed for your request, you may submit it as a "General Inquiry" to the Client Relations department
- For understanding which Group to select for specific tickets, please use the attached definition matrix.