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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.

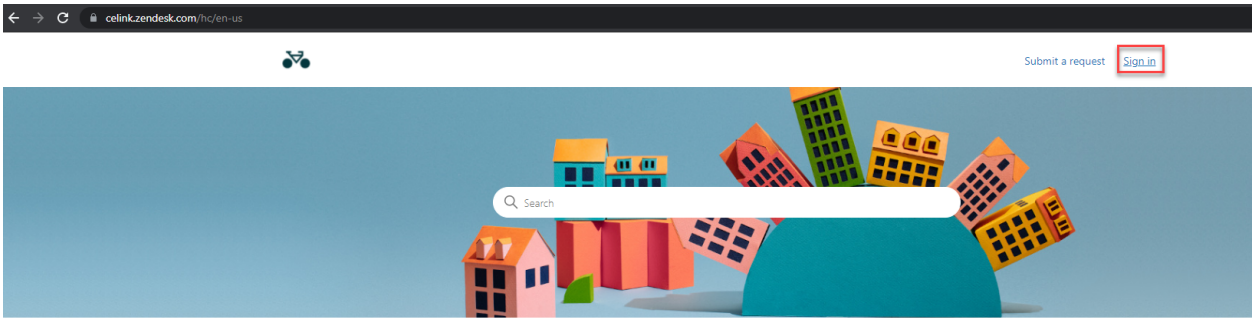
As a note- Chrome Web Browser works best with this application.

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.

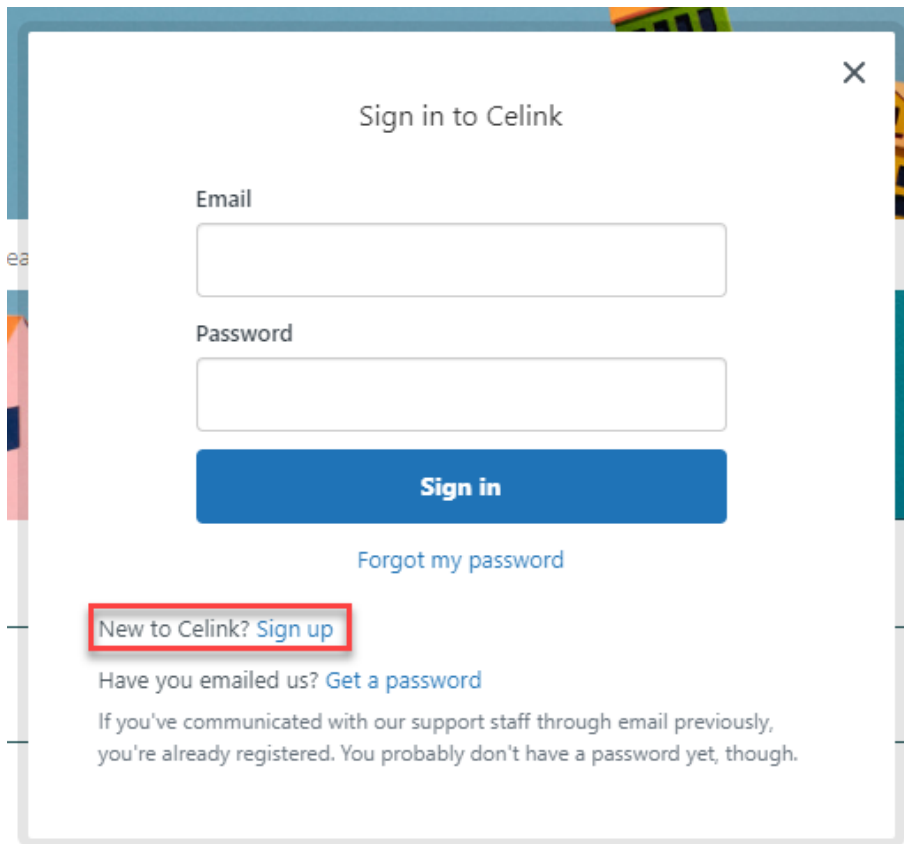
How to create an account

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



Sign in to Celink

Email

Password

Sign in

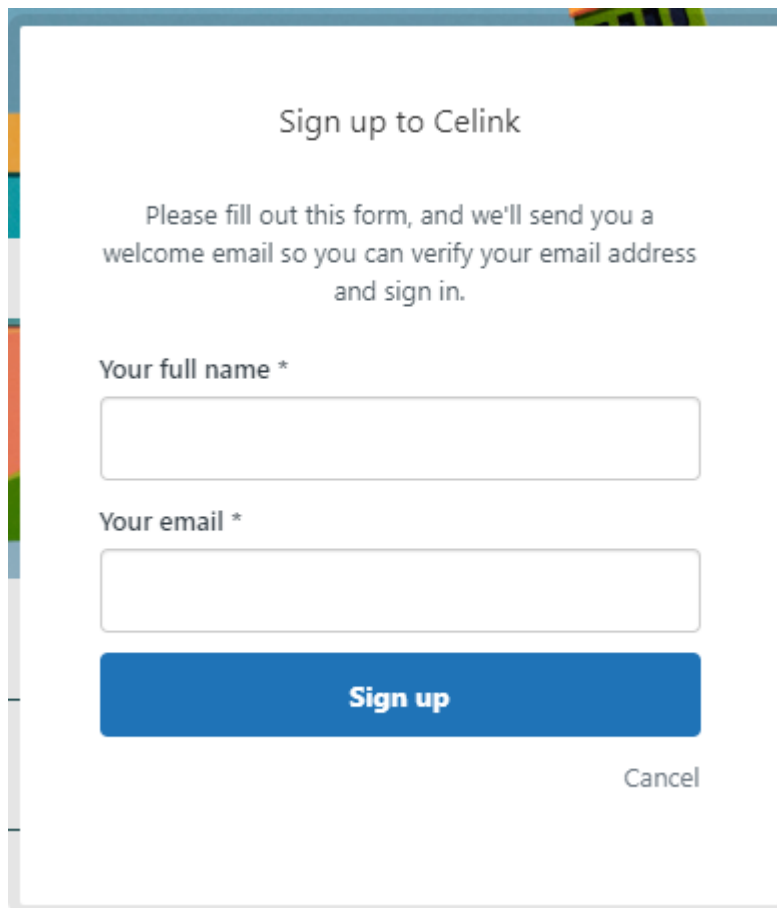
[Forgot my password](#)

New to Celink? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

4. Fill out Your full name and Your email boxes



Sign up to Celink

Please fill out this form, and we'll send you a welcome email so you can verify your email address and sign in.

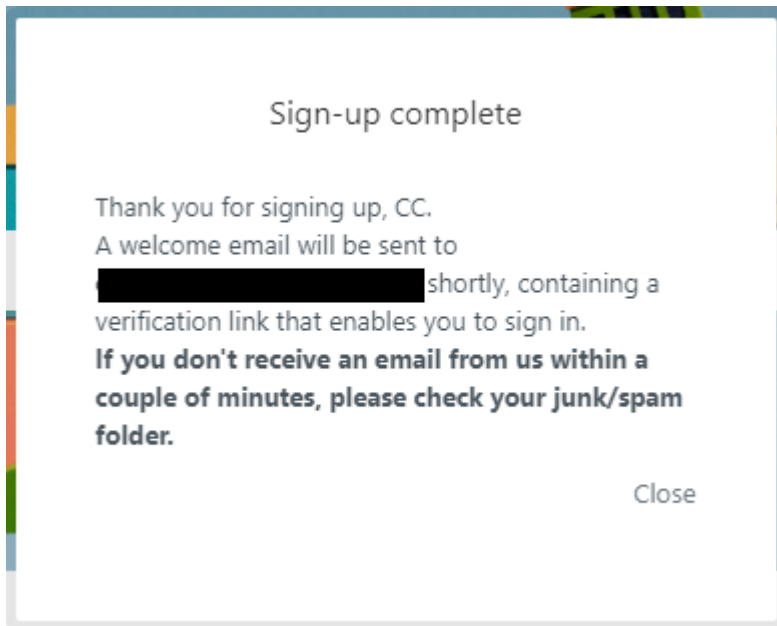
Your full name *

Your email *

Sign up

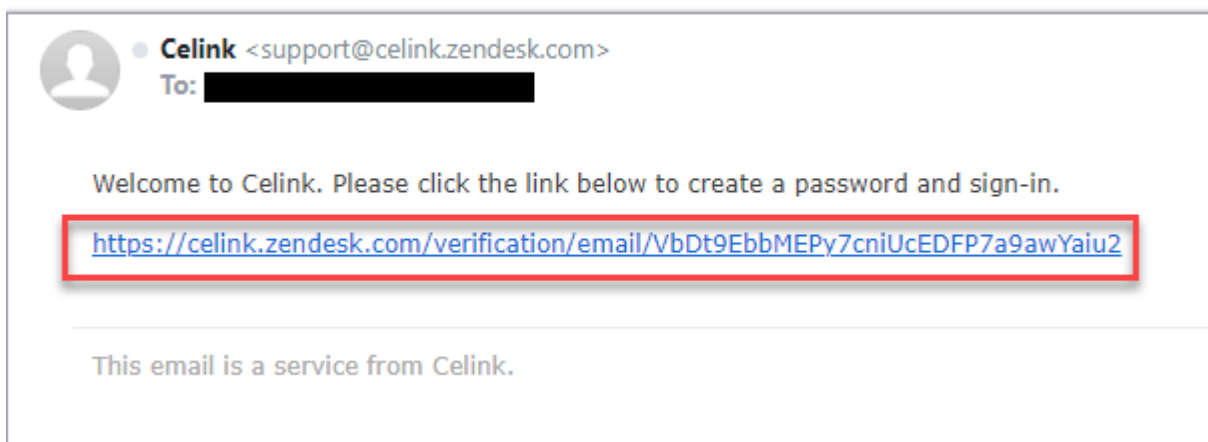
Cancel

5. Sign-up complete message should appear



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

- Welcome to Celinek



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

Choose your secret password

You'll use this password to sign in to Celink.

Your name

Your password

Password requirements:

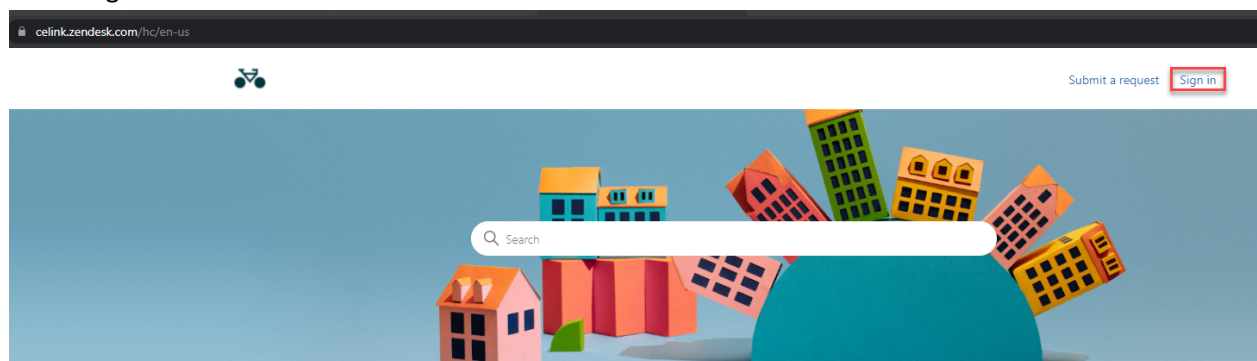
- ✓ must be at least 5 characters
- ✓ must be fewer than 128 characters
- ✓ must be different from email address

Set password

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





Sign in to Celinek

Email

Carla.Link@domain.com

Password

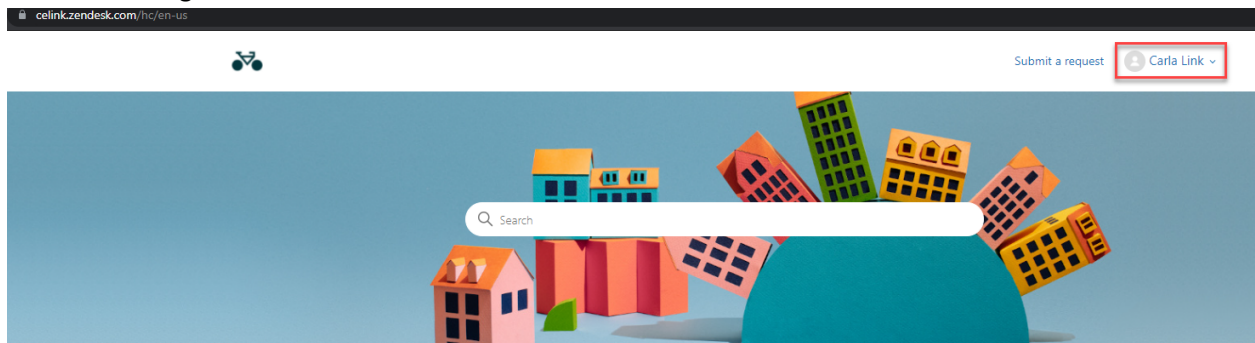
.....

Sign in

[Forgot my password](#)New to Celinek? [Sign up](#)Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

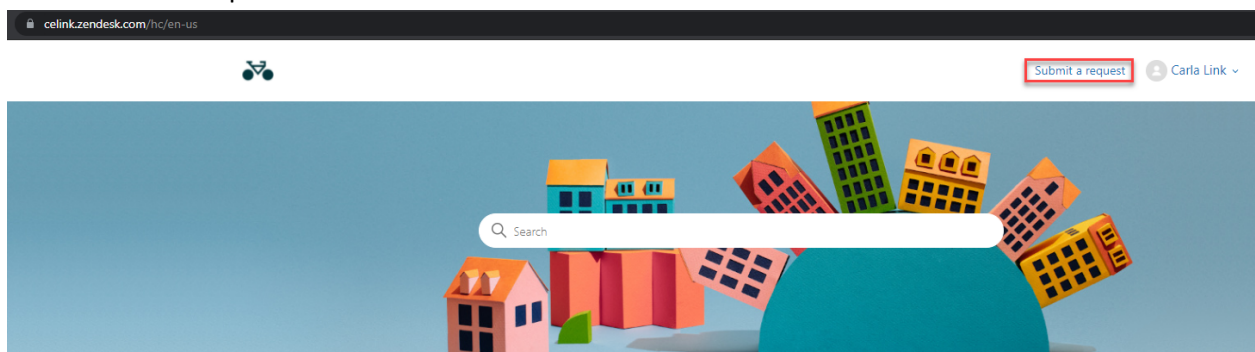
3. Enter Email and Password
4. You are now signed in



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.

celink.zendesk.com/hc/en-us/requests/10037

Submit a request Carla Link

✓ Your request was successfully submitted. ✕

Requests Contributions Following

Celink > My activities

Need Direct Deposit Setup ASAP

Carla Link
a few seconds ago

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

Add to conversation

Requester	Carla Link
Created	Today at 09:46
Last activity	Today at 09:46
<hr/>	
Id	#10037
Status	Open
Priority	Normal
Process Name	BC Admin & Request Processing > Direct Deposit / ACH Setup
Request Type Direct Deposit / ACH Setup	Rush Direct Deposit Setup
Celink Loan Number	789456123

- Your Request has been received! Request 10037 - Need Direct Deposit Setup ASAP



• **Celink** <support@celink.zendesk.com>
To: Carla Link

Your request (10037) has been received and is being reviewed.

As a reminder, there is a list of commonly-asked Reverse Mortgage Servicing questions and answers on our Borrower Portal.

To add additional comments, reply to this email.

This email is a service from Celink.

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

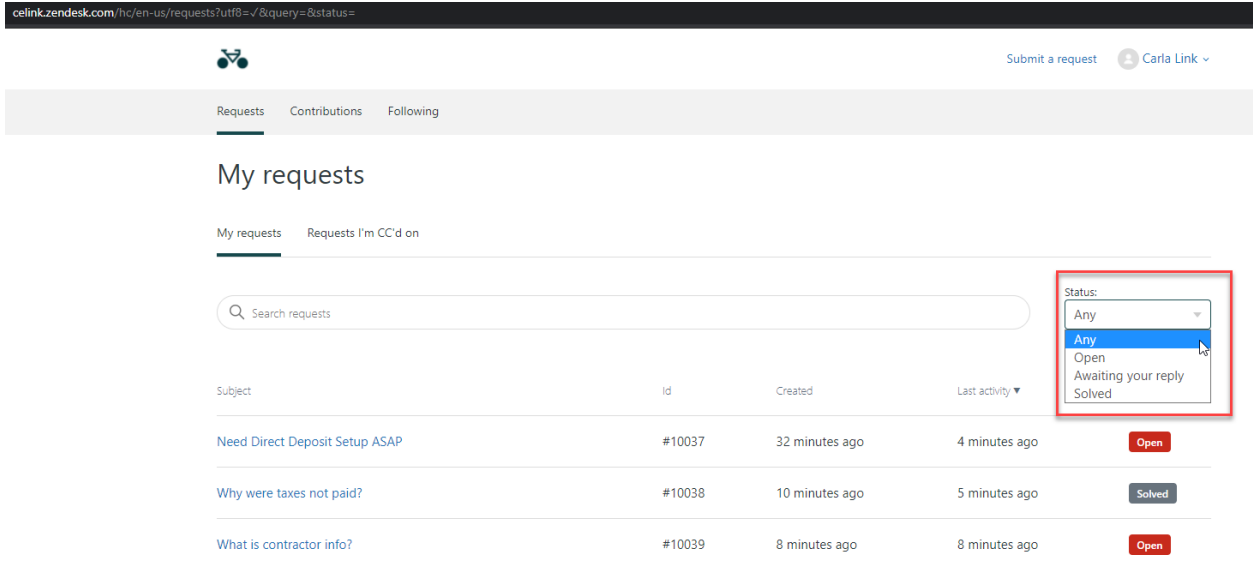
celink.zendesk.com/hc/en-us

Submit a request Carla Link

My activities
My profile
Change password
Sign out

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.

celink.zendesk.com/hc/en-us/requests?utf8=✓&query=&status=



Submit a request Carla Link

Requests Contributions Following

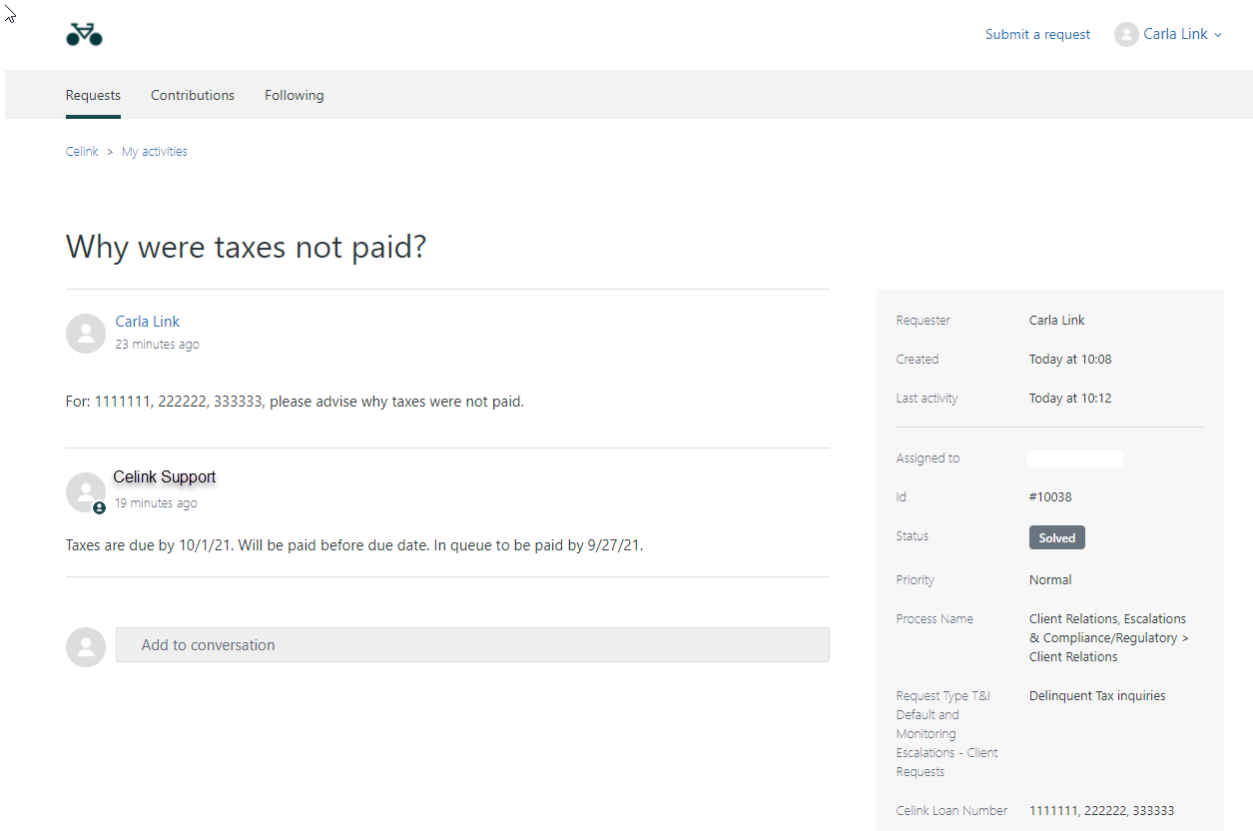
My requests

My requests Requests I'm CC'd on

Search requests

Subject	Id	Created	Last activity	Status
Need Direct Deposit Setup ASAP	#10037	32 minutes ago	4 minutes ago	Open
Why were taxes not paid?	#10038	10 minutes ago	5 minutes ago	Solved
What is contractor info?	#10039	8 minutes ago	8 minutes ago	Open

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



Submit a request Carla Link

Requests Contributions Following

Celink > My activities

Why were taxes not paid?

Carla Link
23 minutes ago

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

Celink Support
19 minutes ago

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

Add to conversation

Requester: Carla Link
Created: Today at 10:08
Last activity: Today at 10:12

Assigned to: [Redacted]
Id: #10038
Status: Solved
Priority: Normal
Process Name: Client Relations, Escalations & Compliance/Regulatory > Client Relations
Request Type T&I: Delinquent Tax inquiries
Default and Monitoring: Escalations - Client Requests
Celink Loan Number: 1111111, 222222, 333333

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.

Submit a request

Carla Link

Requests

Contributions

Following

Celink

>

My activities

Why were taxes not paid?

Carla Link

23 minutes ago

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

Celink Support

19 minutes ago

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

Add to conversation

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

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 /


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 

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

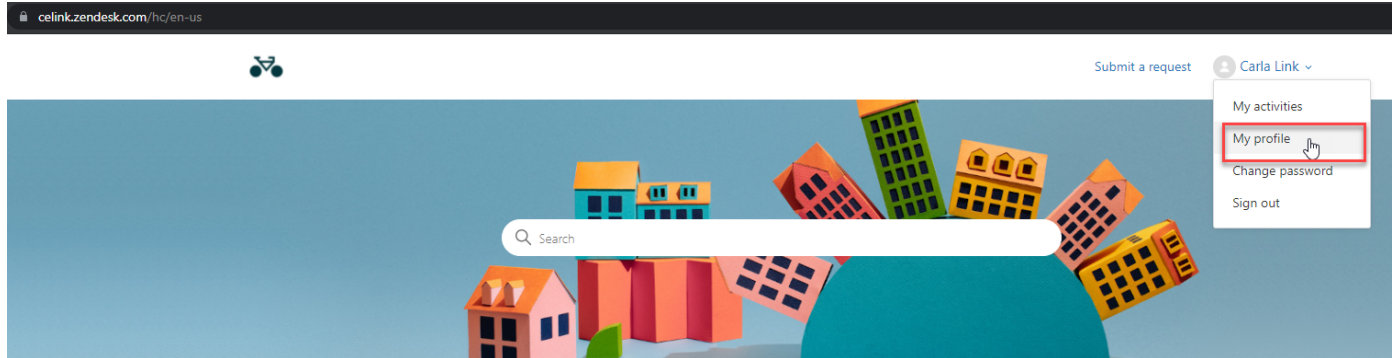
Requester	Carla Link
Created	Today at 10:08
Last activity	Today at 10:39
Assigned to	
Id	#10038
Status	Open
Priority	Normal
Process Name	Client Relations, Escalations & Compliance/Regulatory > Client Relations
Request Type T&I Default and Monitoring Escalations - Client Requests	Delinquent Tax inquiries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

How to manage your user profile

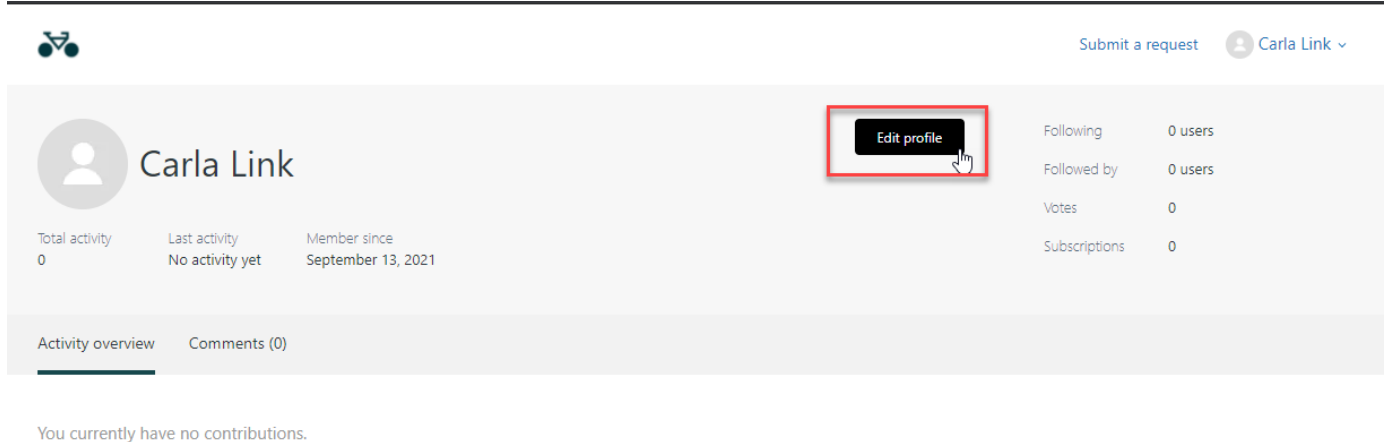
This section will outline steps taken to manage your user profile.

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.

Edit my profile

Name

Carla Link

Profile photo (optional)



Change photo

Email

Carla.Link@domain.com

Phone (optional)

999-999-9999

Description (optional)


Servicing Oversight Manager at Domain Reverse Mortgage Company.
Responsible for Default and Liquidation Servicing.


Tell the rest of the community a bit about yourself.


385

OK

6. Information will show updated on your profile



[Submit a request](#)  Carla Link



Carla Link

Servicing Oversight Manager at Domain Reverse Mortgage Company. Responsible for Default and Liquidation Servicing.

Total activity
0

Last activity
No activity yet

Member since
September 13, 2021

Activity overview

Comments (0)

Edit profile

Following
0 users

Followed by
0 users

Votes
0

Subscriptions
0

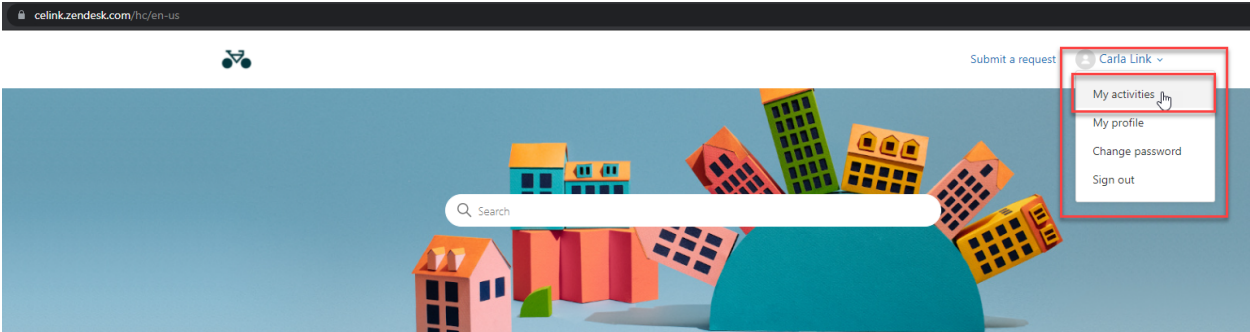
You currently have no contributions.

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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”

Submit a request

Carla Link

My activities

My profile

Change password

Sign out

Requests

Contributions

Following

Celink > My activities

data is wrong

Carla Link

1 hour ago

DIL date not populating. why?

Add to conversation

Requester	Carla Link
Created	Today at 12:47
Last activity	Today at 12:47
Id	#10043
Status	Open
Priority	Normal
Process Name	Early Default, Maturities, Extensions, SS, DIL, NBS > DIL (Deeds in Lieu of Foreclosure)
Request Type	Data Discrepancy
DIL(Deeds in Lieu of Foreclosure)	
Celink Loan Number	987654

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

data is wrong

Carla Link
1 hour ago

DIL date not populating. why?

Please close out the request. I found the information that was needed.

Add file or drop files here

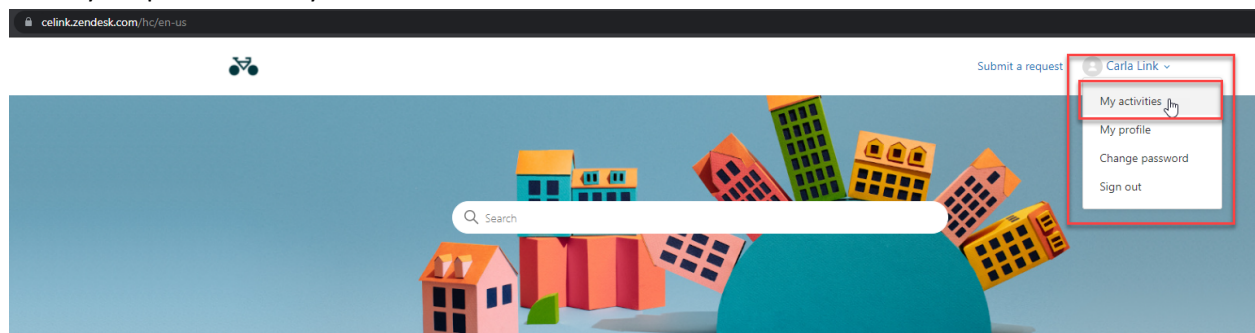
Submit

Requester	Carla Link
Created	Today at 12:47
Last activity	Today at 12:47
Id	#10043
Status	Open
Priority	Normal
Process Name	Early Default, Maturities, Extensions, SS, DIL, NBS > DIL (Deeds in Lieu of Foreclosure)
Request Type	Data Discrepancy
DIL(Deeds in Lieu of Foreclosure)	
Celink Loan Number	987654


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.

 Submit a request Carla Link

Requests Contributions Following


My requests

My requests Requests I'm CC'd on

Status: Any

Subject	Id	Created	Last activity	Status
Need request	#10044	1 hour ago	a few seconds ago	Awaiting your reply
LOC draw request needed asap	#10045	1 hour ago	21 minutes ago	Awaiting your reply
data is wrong	#10043	1 hour ago	1 hour ago	Open


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

 Submit a request Carla Link

Requests Contributions Following

Celink > My activities


Need request



Carla Link

1 hour ago


why is this not updated?



Celink Support

4 minutes ago

What field do you need updated? What is the value you expect to see?

 Add to conversation

Mark as solved

Requester

Created

Last activity

Carla Link

Today at 12:47

Today at 14:10

Assigned to

Id

Status

Priority

Process Name

Request Type At-Risk Extensions

Celink Loan Number

#10044

Awaiting your reply

Normal


Early Default, Maturities, Extensions, SS, DIL, NBS > At-Risk Extensions

Renewal requests for At Risk extension


999999

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


Need request

 **Carla Link**
1 hour ago

why is this not updated?

 **Celink Support**
4 minutes ago

What field do you need updated? What is the value you expect to see?



T B I | | | | | | | |

At Risk extension date. It is not updated in the system.


Add file or drop files here

Mark as solved & Submit


Submit

Requester	Carla Link
Created	Today at 12:47
Last activity	Today at 14:10
Assigned to	
Id	#10044
Status	Awaiting your reply
Priority	Normal
Process Name	Early Default, Maturities, Extensions, SS, DIL, NBS > At-Risk Extensions
Request Type At-Risk Extensions	Renewal requests for At Risk extension
Celink Loan Number	999999

Need request

 **Carla Link**
2 hours ago


why is this not updated?

 **Celink Support**
8 minutes ago

What field do you need updated? What is the value you expect to see?

 **Carla Link**
a few seconds ago

At Risk extension date. It is not updated in the system.



Add to conversation

Mark as solved

Requester	Carla Link
Created	Today at 12:47
Last activity	Today at 14:18
Assigned to	Celink Support
Id	#10044
Status	Open
Priority	Normal
Process Name	Early Default, Maturities, Extensions, SS, DIL, NBS > At-Risk Extensions
Request Type At-Risk Extensions	Renewal requests for At Risk extension
Celink Loan Number	999999

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.