# *'Trello User Manual'*

Contents

Timeline of a File

Most files will begin the Trello lifecycle as a 'Lead' card. As the loan progresses, the card will be moved across lists, (by dragging and dropping) -- ideally finishing in the 'COMPLETED' list.
*Care should be exercised when moving cards from one list to another, as certain lists will automatically populate tasks that are specific to that stage in the loan process and should not be performed earlier.*
Apart from auto-populated tasks when a card is moved from one list to another, tasks can also be added automatically by clicking Automation buttons, such as 'Disclosed', or 'Closed'.

1. **Leads** -- Lead cards are created automatically when a Jungo Lead Docsbar email is sent out, or when a Consumer Connect loan application is submitted, however these cards will need to be *renamed manually.*
   a. When a lead is not entered through Jungo or Consumer Connect, the card will need to be created manually by hitting the *'+ Add a Card'* button at the bottom of the 'Leads' list
   *Use the *'Borrower's Last Name, Borrower's First Name'* naming convention (Ex: Smith, John)
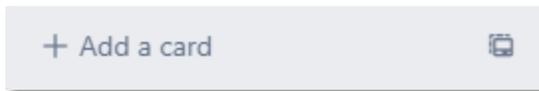
2. **LO Review / Disclosing** – Move card here once initial docs are gathered and the file is ready to be reviewed by LO.
   *Once file has been disclosed to a lender, it will remain in this list, but the card's *'Disclosed'* button should be clicked for tasks to be automatically added to a checklist at this point in the loan.
   Disclosed button can be found on the right side of a card under the 'Automation' section
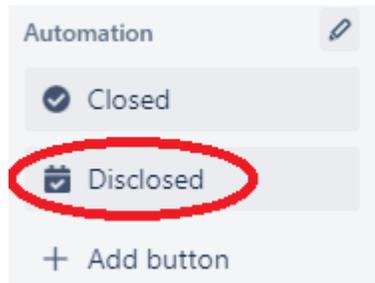
3. **Submitted (Awaiting Conditions)** – Move card here once a file has been submitted to a lender.
4. **Submitted (Conditions Received)** – Move card here once a conditional approval has been received.
5. **Clear to Close** – Move card here once a clear to close has been received.
6. **Post-Closing** – Move card here once a file has closed.
7. **Completed** – Move card here once all post-closing procedures have been completed.

Using Checklists

There are four different Checklists that will be automatically added to a card at different stages of the file. However, if deemed appropriate, additional checklists can be manually added by clicking *'Checklist'* on the right side of a card, under the *'Add to Card'* section.
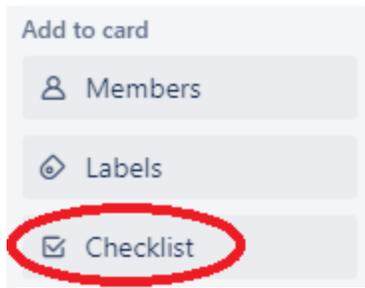
1. **Checklist** – This is the main checklist for all important tasks to be completed on a file. It will appear automatically any time a card is added to the *'Leads'* list.
2. **Conditions: PENDING (Once Received > Move to Next List)** – This checklist will be added automatically once a conditional approval has been received, and card is moved into the *'Submitted (Conditions Received)'* list.
   a. This is where you will copy & paste all conditions found on a conditional approval. Once an item has been received and deemed appropriate to submit to lender, the task for that condition should be dragged and dropped into the next list.
3. **Conditions: RECEIVED (Once Submitted > Mark as Complete)** – This checklist will be added automatically once a conditional approval has been received, and card is moved into the *'Submitted (Conditions Received)'* list.
   a. This is where you will manage conditions which have already been received. Once the item has been provided to the lender, the task for that condition should be checked as *Completed.*


4. **Post-Closing Tasks** – This checklist will be added automatically once a loan has closed, and card is moved into the *'Post-Closing'* list. Post-closing tasks will be automatically populated on this list.

Assigning Tasks & Due Dates

Anyone can assign (or re-assign) a task within a checklist to any team member on the board in which that card lives. This is mainly used to delegate work, but can be also beneficial to help someone pick up where another member left off in a case where they're on vacation, or out sick for the day.

*Tasks can also be auto-populated once a card reaches a certain position on the board, or when other conditions are met. To learn more about automating tasks visit: www.Trello.com (Automation)

1. **To assign a task to someone**, hover over the task name and click the [icon] icon that appears towards the right-hand side of the task
   a. A dropdown window will appear with all board team members. Select the member to which this task should be assigned *(See below)*
   b. ****Only ONE person may be assigned to any given task.***
2. **To assign a due date to a task**, hover over the task name and click the [icon] icon that appears towards the right-hand side of the task
   a. A dropdown window will appear with a calendar to select the date *(See below)*
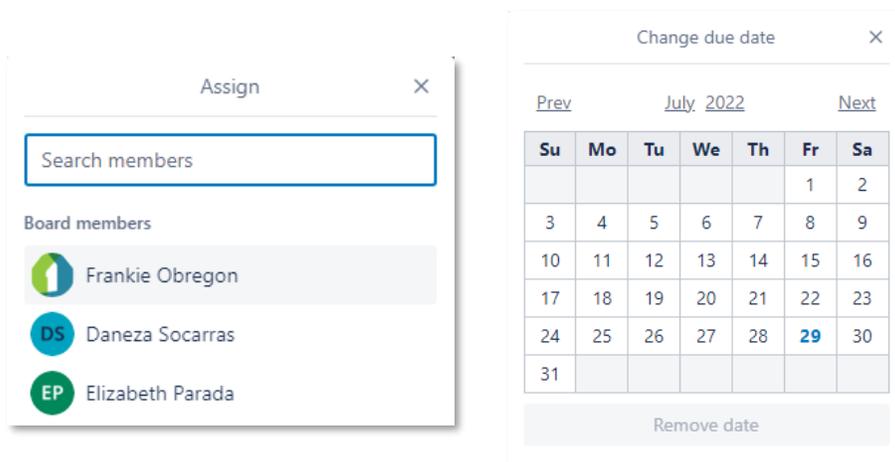
3. Assigned members and due dates can be changed using this same process. However, when assigned, these icons will change to display the due dates and team member assigned.

Your To-Do List

To view all of your assigned tasks in one place, click on the 'Trello' logo on the top left corner of the screen, then select the 'Home' page

- Your tasks will be displayed on the top and center of this page under the heading: ***'Your Items'*** in ascending due date order – Starting with due today *(or overdue)* items on top.
- Items with no due date will appear last, in the order in which they were added.

*Tip: When adding a task that needs to be completed ASAP, set the due date to a prior date to make the task display at the top of your To-Do list.

# Communicating Within Trello (Using Tags)

Please keep in mind that in order to receive instant email notifications for these communications, you will need to change your communication preferences within the Trello settings page.

Setup

To make sure that you're receiving instant notifications for communications within Trello, verify the following.

1. Within Trello click on your profile image in the top right corner, and click on *'Settings'*
   If you haven't selected a profile photo, this will display as your initials
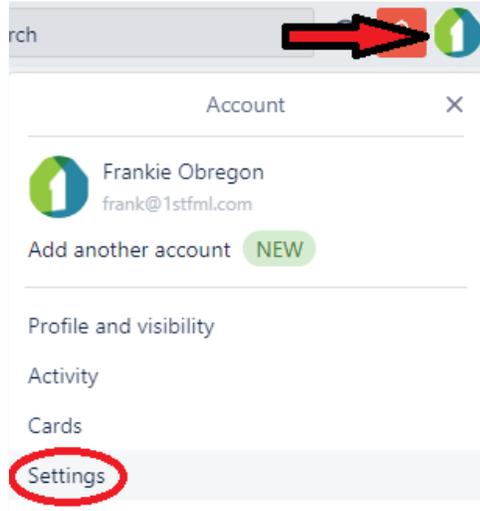
2. Under the *'Notifications'* section, click on *'Change notification email frequency…'* and select **'Instantly - Send emails as soon as possible'.**
   The default for this option is 'Periodically-Send emails about once an hour' which will send you an update of things you've missed every hour or so, but is somewhat unreliable.
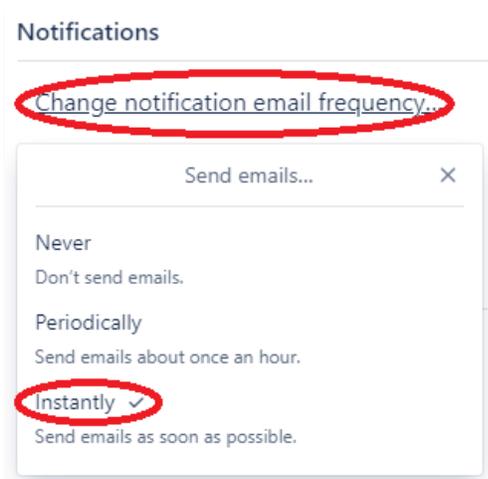
3. Selecting *'Allow desktop notifications'* will also allow your browser to display pop-up notifications for Trello activity on the bottom right corner of your screen *(*Requires Trello to be open)*

Tagging Team Members

Aside from assigning tasks to delegate work amongst the team, you can also tag team members within individual tasks to let them know you've followed up on an item, or in the Activity log at the bottom of a Trello card to quickly share an update with one or more team members. Simply start by typing the '@' symbol, followed by the person's name.

1. **To tag someone in a task**, click on the task name to edit, and type the '@' symbol, followed by the person's name. A list of team members whose names match will appear.
   Note: This will not assign the task to this person, it will only send them a notification.
   a. You can click on the person's name OR use the *'Up or Down Arrow Keys'* to select the desired member, and the *'Tab'* key to tag them
   b. Examples of when to use this feature include:
      i. If you've been asked to let someone know as soon as you hear back about what's delaying a certain task, you can update the task to read:
         "COI – Ordered on 7/27 – FU'd on 7/31 – Awaiting Inspections as of 8/2 @member"
         *In this example you would be adding an update to your task as well as simultaneously providing the update you were asked to deliver.
      ii. If you need to assign a task to someone but you're not sure who's available to complete it this instant, you can create a task:
         "Can someone please request a VOE ASAP? @member1 @member2"
         *In this example you're tagging two members to see which one responds sooner. Best practice would be to assign it to yourself in the meantime, so it doesn't get forgotten.
2. **To tag someone in a comment**, scroll to the bottom of a card to find the *'Activity'* section
   Tags work in the exact same way as described above.
   a. Comments should be used when providing detailed updates on an item, whereas notes within tasks should be limited to key updates or most recent follow-up dates.
   b. Examples of when to use this feature include:
      i. If multiple people are dealing with a client and you want to leave notes for each other:
         "Followed up on @member1 email sent to client on 7/15. Client asked for email to be resent, and informed that they've uploaded docs. @member3 can you please add docs to client file and let me know when they're ready for review?"
         *In this example you're letting *'Member1'* know that you followed up, and simultaneously asking *'Member3'* for support in organizing docs that have been received. Best practice would be to then follow through and create a task for *'Member3'* in the Checklist, to guarantee that the task will show up on their To-Do list.
3. ***Disclaimer:*** Tags should mainly be used as a "nudge" or gentle reminder of something that is NOT time-sensitive, usually in reference or in addition to information that has already been communicated in some other way. DO NOT rely on Trello tags to 100% replace company communication. If there is an urgent matter, pick up the phone and make a call. Assure that the information has been communicated, and then if appropriate, leave a comment as well to document the date/time of communication.
   a. Ex: You've received notice that a file has been placed on hold by a lender: Call the LO and advise them immediately if you're unsure how to proceed.

Best Practices

The following best practices should be used whenever possible to maximize efficiency within the team by ensuring that all updates are being tracked in Trello and are easily accessible.

*Updates should be noted in Trello as soon as they become available.

*Please keep in mind that the following examples are just one way of accomplishing this; If a more efficient method of annotation is preferred, feel free to implement – As long as updates are being tracked and easily viewable by all.

Add Recent Follow-Up Dates/Notes to Individual Tasks

Aside from using the Activity log at the bottom of a Trello card, Key follow-up dates and updates should be appended to relevant tasks *(when appropriate)* to provide an at-a-glance view of progress made on a file. This will look differently depending on the task at hand, the following is just an example.

1. Ex: The task **_'COI – To be Ordered'_** will be added automatically when the *'Disclosed'* button is used on a card. Once COI has been ordered, edit the task to note the date of last follow up, and update status.
    *Task should now read as **_'COI – Ordered on 7/27'_**
2. If a follow up has been made, append that date to the same task.
    *Task should now read as **_'COI – Ordered on 7/27 – FU'd on 7/31 – Pending Response'_**
3. If a response was received, update task name to reflect new information.
    *Task should now read as **_'COI – Ordered on 7/27 – FU'd on 7/31 – Awaiting Inspections as of 8/2'_**
4. If a *future* follow-up date is required, simply add a due date to the task and assign yourself (or team member who is to complete task)
    *This date should not be included in task name, as to avoid redundancy

5. Last touch, and follow-up dates at a minimum should be appended to the original task name.
    *If an update is received that is too long to include in the task name, or you simply want to elaborate on your shorthand notes from above, then scroll to the bottom of the card and add updates as comments under the *'Activity'* log section.

Make Cards and Tasks Easy on the Eyes

1. Use asterisks within Trello to **bold,** *italicize,* or ***bold and italicize*** certain portions of the task, to draw attention to the important information, and make cards easier to read.
    *Ex: The item in which the task is in reference should be inserted at the beginning of the task name whenever possible in **BOLD**, and the current status should be appended to the end of the task name in *ITALIC*

    In this example, the original order date is no longer the most important piece of information for this task, so it will be left as is. COI has been bolded, and the most recent follow-up has been italicized.
2. Any text within a set of the following asterisks will be formatted as follow:
    a. **Italic**
    b. ****Bold****
    c. ******Italic & Bold******

Organizing Conditions

As this process can be difficult to explain, please begin by visiting www.1stFML.com/Training to watch the tutorial video titled *'Organizing Conditions in Trello'* before proceeding.

1. Once a conditional approval is received on a file, conditions should be copied and pasted into the checklist titled ***'Conditions: PENDING'***
   a. Once conditions are added as individual tasks, they can be delegated and assigned to different team members for completion
2. Once an item to satisfy a condition has been received, reviewed, and deemed appropriate to submit to lender, the task for that condition should be dragged into the next list, titled ***'Conditions: RECEIVED'***
   a. Item should not be marked as *Completed* until it has been submitted to lender

The process for copying and pasting conditions from a conditional approval may vary slightly between lenders, and can be streamlined by using a *Microsoft Word* or *Notepad* document as a temporary placeholder between a conditional approval, and the Trello card. The process detailed below can be viewed as a **VIDEO (Link)**:

1. Select and copy all conditions from a conditional approval and paste them into a blank Microsoft Word (or Notepad) file:

Conditional Approval (PDF)   *Microsoft Word Document*

2. Format conditions in Word (or Notepad) to ensure that tasks will be correctly entered into Trello for each condition:
   a. **Each individual condition should be on its own new line**
      *When copying from a PDF and a condition shows on multiple lines, this will register as multiple line breaks in Word. Since each new line break will create a new Trello task when transferred, care should be exercised to ensure that if a condition is displaying on multiple lines, this is only because it's too long to fit on one, and is therefore wrapping to the next line. You may need to go to the beginning of several lines and hit backspace, to ensure that the second half of the condition is not going to be input as its own separate task in Trello.

      (Continued on Next Page…)

b. **Check for and correct spelling errors**
Remember that these conditions are often input manually be a real person and may include spelling errors that can make a condition difficult to understand. If you're certain something was written in error, this is the time to correct it before transferring these conditions to the Trello card.
   i. *NOTE: When copying from a *Loan Depot* conditional approval, there seems to be a glitch causing the letter 'T', and a letter before or after it to be removed, so words may appear to be missing or misspelled. (Ex: *'title'* may appear as *'tle'*, *'after'* appears as *'a er'*, *'additional'* appears as *'addi onal'*, *'properties'* appears as *'proper es'*, etc.)

c. **Remove the word 'Open' from the beginning of each condition**
*TIP: Use the keyboard shortcut 'Ctrl + Shift + Arrow key' to quickly highlight a single word. Each time you press the arrow key in a desired direction while holding 'Ctrl + Shift', additional words will be selected, starting from where your cursor is placed.

3. Select all conditions from formatted Word document, copy and paste them into a single Trello task under the checklist *'Conditions: PENDING'* and hit **'Add'** (or press Enter)
*If line breaks were formatted correctly in Word, upon hitting the 'Add' button, individual tasks for each condition will be automatically created

4. You can now move on to cleaning up individual conditions to make them easier to read as described earlier in *"Make Cards and Tasks Easy on the Eyes"*

    Once complete, the finished checklist should:

    a. **Include individual tasks for each condition**, which can now be assigned to other team members and be given due dates (used to track daily workload)

    b. **Include any applicable notes** (Ex. If you know a condition should be challenged, append the text: "To be challenged", assign it to yourself, and include today's date as the due date

    c. **Be easy to scan and read quickly**, by titling each condition in **bold** and writing applicable follow-through updates in *italics*

    d. As the processor on a file, you may choose to delete tasks which you know are duplicated on the Trello card and already assigned to someone, such as *'COI'*, *'Title Report'* or *'Appraisal'* – However, since you will need to review these items before submitting them to the lender, best practice is to keep them on this checklist as well, as a reminder to yourself.

        Please ensure that you do not assign these tasks to someone who already has a duplicate task assigned.

Below please find two examples of a properly formatted initial checklist. Please keep in mind that you can also reorganize the order of these checklist items as you deem appropriate, as well as group them within the checklist by adding a page break in between sets of conditions using "dummy tasks" as section headers (Second Image). These headers are just examples and do not necessarily need to be adhered to.