

Workflow Processing in SkySlope Books

How to Access SkySlope Books

^(*) Access will not be available until your account build has been completed. Your CSM will let you know once you have access and can log into Books!

- 1. Log into your <u>SkySlope Suite account</u>
 - a. Use the Apps menu and Select Books from the dropdown
- 2. Log directly into the SkySlope Books login page and enter your SkySlope credentials

How to reach the Books Rockstar Support Team!

- 1. Email 📩 BooksSupport@SkySlope.com
- 2. Live Chat Q bookssupport.skyslope.com
 - a. Just click on Chat in the bottom left corner of the



SkySlope Books Articles

SkySlope Books training resources, tutorials, and product updates at <u>bookssupport.skyslope.com</u>.

Here are some articles specific to Workflow Processing!

- 1. Workflow for Processing Deals in SkySlope Books
- 2. <u>Creating and Manually Syncing Deals with SkySlope Integration</u>
- 3. <u>Creating Deal Boards</u>
- 4. Deal Statuses
- 5. <u>Disbursement Statuses</u>
- 6. <u>Best Practices for Printing Checks</u>
- 7. Processing Payouts Creating and Printing Checks
- 8. Processing Payouts Create Bills
- 9. <u>Processing Payouts EFT</u>
- 10. Deal Report Details

Setting Up Integrations

1. <u>Payload</u>