

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

 bookssupport.skyslope.com
 - a. Just click on Chat in the bottom left corner of the



SkySlope Books Articles

L SkySlope Books training resources, tutorials, and product updates at bookssupport.skyslope.com.

P Here are some articles specific to Workflow Processing!

1. <u>A NEW DEAL PAGE IS HERE!</u>

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

Setting Up Integrations

1. <u>Payload</u>