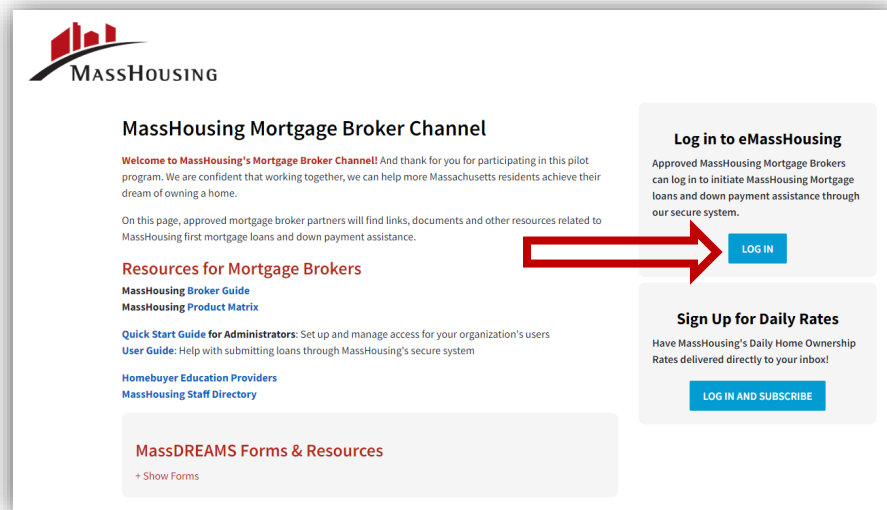




Broker QuickStart Guide

1. Log into the site from the [Home Page](#).



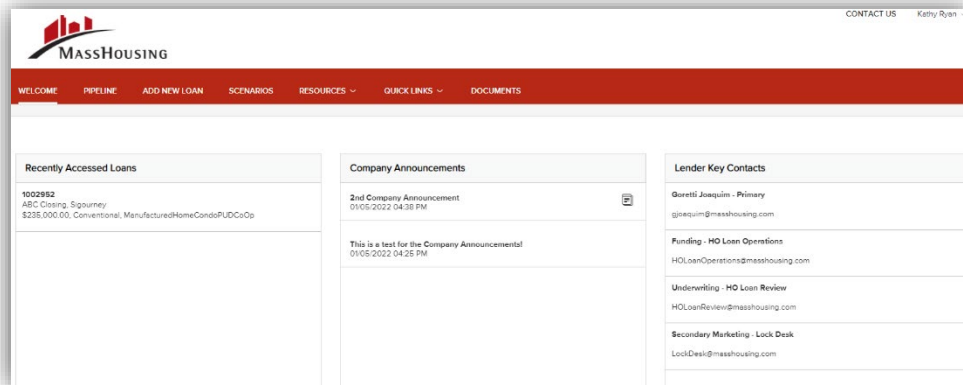
2. Enter the credentials assigned to you. To setup a new password or to update an expired or forgotten password, the user will need to create a Password Length of 16 characters including a minimum of: 1 Upper Case Letter, 1 Lower Case Letter, 1 Number and 1 Special Character. The new password expiration date will be 180 Days.

EX: username: john.smith@abclender.com

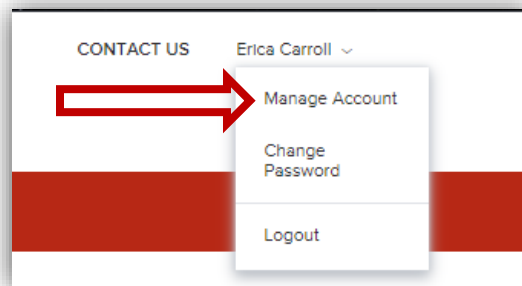
Temp password: This1sMyNewP@ssword



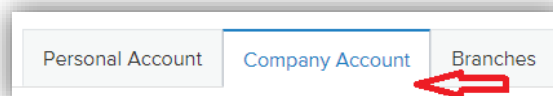
3. After login, you will land on the Welcome Page.



4. Before a User can add, modify, or assign a Persona to another User, they MUST have been designated as an ADMIN for the lender. The ADMIN designation will allow them access to the “Manage Account” page on the site.
5. In the upper right-hand corner, click your name, then click Manage Account:



6. Select “Company Account” or “Branches” to display users. This is where you will be adding or changing a user account

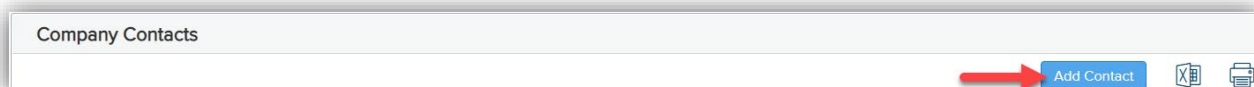




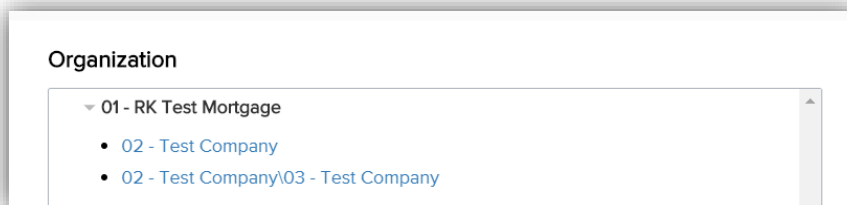
Adding a New User

Follow the steps below to create new users for your Company while logged into the site. Again, you must have ADMIN privileges to add a new user account.

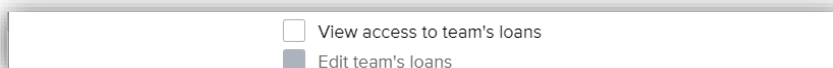
1. Scroll down to the “Company or Branch Contacts” and click “Add Contact”



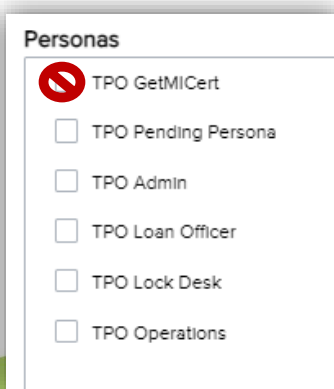
2. Complete all *Required fields
 - a. When you get to Organization, please click “Choose”
 - i. Select the organization/branch you are creating this contact for, then click **SAVE**:



3. If they are allowed to View/Access their team’s loans and edit them, please make the appropriate selection, and then click **SAVE**.



4. Each new user requires Persona. Select desired Persona for this User by selecting the box to the left of the Persona Description. ***The GetMICert Persona should not be used.***



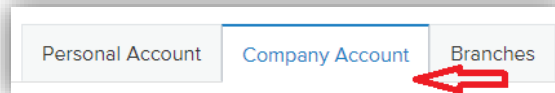


Persona Descriptions

- ~~TPO GetMICert~~ (generate an MI Certificate)
- **TPO Pending Persona** (temporary persona, no rights, this should be changed by broker Admin as soon as possible for each user)
- **TPO Admin** (designated by Broker, rights to add, delete, modify privileges for users)
- **TPO Lock Desk** (create loan, lock, scenario, purchase advice)
- **TPO Loan Officer** (create loan, scenario)
- **TPO Operations** (create loan, scenario, purchase advice)

Changing a Persona on an existing user

1. After you hit Manage Account, select the Tab Labelled Company Account to display users



2. Scroll down the page to the Company Contacts Section, find the user on the list that you want to Change and select **VIEW** to the right of their name.

| Company Contacts | | | | | | | Add Contact | |
|------------------|-----------|---------|----------------|--------------------------|--------------|----------|-----------------------------|----------------------|
| First Name | Last Name | Address | Business Phone | Email | Login Status | Personas | | |
| Oneida | Fuentes | | | ofuentes@masshousing.com | Enabled | 1 | | View |



3. Click **EDIT** Information Button top right of window. A screen will appear scroll to bottom where you will see a blue button to Edit Persona

Edit Contact Information

* Email Address: testnondelegated@noemail.com

* First Name: Test

Middle Name:

* Last Name: Non Delegated

Login Status: Enabled

* Login Email Address: testnondelegated@noemail.com

NMLS ID:

Social Security #: ###-##-####

Organization: 03-Test TPO UCT Del

☒ Use Company Address

Address: 2 Test St

City: Boston

* State: Massachusetts

Zip: 02114 -

Business Phone: Ext.:

Business Fax: Ext.:

Cell Phone:

* Personas: TPO Pending Persona , TPO Loan Officer , TPO

Operations

[Edit Persona](#)

☒ View access to team's loans

☒ Edit team's loans

Assigned AE: Goretti Joaquim

Record Last Updated: 6/10/21 6:42:55

Cancel Save



4. Select desired Persona for this User by selecting the box to the left of the Persona Description.
The GetMICert Persona should not be used.

Personas

- ☒ TPO GetMICert
- ☐ TPO Pending Persona
- ☐ TPO Admin
- ☐ TPO Loan Officer
- ☐ TPO Lock Desk
- ☐ TPO Operations

Persona Descriptions

- **~~TPO GetMICert~~** (generate an MI Certificate)
- **TPO Pending Persona** (temporary persona, no rights, this should be changed by Broker Admin as soon as possible for each user)
- **TPO Admin** (designated by Broker, rights to add, delete, modify privileges for users)
- **TPO Lock Desk** (create loan, lock, scenario, purchase advice)
- **TPO Loan Officer** (create loan, scenario)
- **TPO Operations** (create loan, scenario, purchase advice)

5. Click **SAVE** button at bottom of Edit Contact Information screen. Then click **Back to Company Account**.

Manage Account

Personal Account **Company Account** Branches

[Back to Company Account](#) ←

Contact Details [Edit Information](#)

| | | | |
|---------------------|------------------------------|---------------------|-----------------------------------|
| Email Address | testnondelegated@noemail.com | Branch DBA Name | |
| First Name | Test | Company DBA Name | |
| Middle Name | | Address | 2 Test St |
| Last Name | Non Delegated | City | Boston |
| Login Status | Enabled | State | MA |
| Login Email Address | testnondelegated@noemail.com | Zip | 02114 |
| NMLS | | Personas | TPO Loan Officer , TPO Operations |
| SSN | | Assigned AE | Goretti Joaquim |
| | | Record Last Updated | 6/10/21 6:42:55 |

