

TPO User Creation Guide

After Logging into the Portal, click on your name in the upper right:

CONTACT	US Chris	_
	Manage Account	
	Change Password	
	Logout	

Click 'Manage Account' to open your account settings page:

WELCOME	PIPELINE	ADD NEW LOAN	SCENARIOS	DOCUMENTS		
Manage	e Account					
Perso	onal Account	Company Account	Branches			
My Infe	ormation					
						Edit Information
Ema	il Address				Branch DBA Name	
First	Name				Company DBA Name	
Mide	dle Name				Address	
Last	Name				City	
Logi	n Status				State	
Logi	n Email				Zip	

Click on the 'Company Account' tab to open your Company settings page:

LCOME	PIPELINE	ADD NEW LOAN	SCENARIOS	DOCUMENTS							
Manage Ad	ccount										
Personal	l Account	Company Account	Branches								
Company I	Information										
Company	y DBA Name	02 Test Co			Last Loan Submitted Date						
Company	y Legal Name	01-TEST CO			Price Group						
NMLS ID					Originator Type	Broker					
Manager	r/Admin	Manager			VA Originator	No					
	LCOME Manage Ad Persona Company I Compan NMLS ID Manager	PIPELINE Manage Account Personal Account Company Information Company DBA Name Company Legal Name NMLS ID Manager/Admin	PIPELINE ADD NEW LOAN Manage Account Company Account Personal Account Company Account Company Information 02 Test Co Company Legal Name 01-TEST CO NMLS ID Manager/Admin	ICOME PIPELINE ADD NEW LOAN SCENARIOS Manage Account Company Account Branches Personal Account Company Account Branches Company Information Company Legal Name 02 Test Co Company Legal Name 01-TEST CO Image // Admin Manager/Admin Manager Manager	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Manage Account Company Account Branches Image: Company Account Branches Company Information Company DBA Name 02 Test Co Image: Company Legal Name 01-TEST CO NMLS ID Manager/Admin Manager Image: Company Information Image: Company Information	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Manage Account Company Account Branches Image Account Personal Account Company Account Branches Image Account Company Information Image Account Image Account Image Account Company DBA Name 02 Test Co Image Account Image Account Company Legal Name 01-TEST CO Image Account Image Account NMLS ID Image Account Image Account Image Account	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Wanage Account Branches Image Account Image Account Personal Account Company Account Branches Company Information Image Account Image Account Company DBA Name 02 Test Co Last Loan Submitted Date Company Legal Name 01-TEST CO Price Group NMLS ID Image Manager Account VA Originator Type	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Manage Account Manage Account Branches	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Wanage Account Branches	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Wanage Account Wanage Account Branches Personal Account Company Account Branches Company Information Last Loan Submitted Date Company Legal Name 01 TEST CO NMLS ID Price Group Manager/Admin Manager	ICOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS Wanage Account Wanage Account Branches Personal Account Company Account Branches Company Information Lest Loen Submitted Dete Company Legal Name 01-TEST CO NMLS ID Originator Type Broker Manager/Admin Manager VA Originator No

Scroll to the Company Contacts section here:

← →	C 🗘 🗎 powere	express.encompasstpoconne	ct.com/#/home/ma	inageaccount					
	Manager			USDA Originator					
	Assigned AE's	Sanam Mahadeo							
,	AE Email Addresses	smahadeo@powerexpress	mortgage.com						
	Contrata								
	ompany Contacts						Add Contect		
Fi	rst Name Last Nar	ne Address	Business Phone	Emeil	Login Status	Personas			
1		1111 MARCUS AVE			Enabled	2	View		
		1111 MARCUS AVE			Enabled	2	View		
		1111 MARCUS AVE			Enabled	1	View		
		1111 MARCUS AVE			Enabled	2	View		
							• 10 per pege	< 0 ,	
_									-
C	Company Licenses								

Click on Add Contact to open the new user screen:

	stor							
	Create New Contact							
	* Email Address					~		
	🐥 * First Name							
	Middle Name							
	*Last Name							
	Login Status	Enabled						
	*Login Email Address					~		
-	NMLS ID							
	Social Security #	###-##-####						
	+ Organization	Choose						
1		Use Compa	iny Ac	ldress				
	Address							
	City							
	+ State					•		
	Zip	-						
	Business Phone			Ext.				
	Business Fax			Ext.				
	Cell Phone							
	+ Personas	Add Persona						
		View acces	s to te Ioans	am's loa	ans			
	Assigned AE	Sanam Mahadeo	D					
	Record Last Updated	8/11/22 10:30:18						
l								
						Can	cel	Save

The following information is required in order to create a user account:

- Email Address (used for communications)
- First Name
- Last Name
- Login Email Address (used on the login screen)
- Organization
 - \circ $\;$ Click save once the new window opens to choose your organization.
- State
- Personas
 - Choose from: TPO LOAN OFFICER / TPO LOAN PROCESSOR

Once all required fields have been entered, click Save.

If any fields are missing, an error message will be displayed:

•	7 Errors Found - Please fix the errors and try again.								
	• Email Address		~						
		! This is a required field.)						
	* First Name	! This is a required field.							