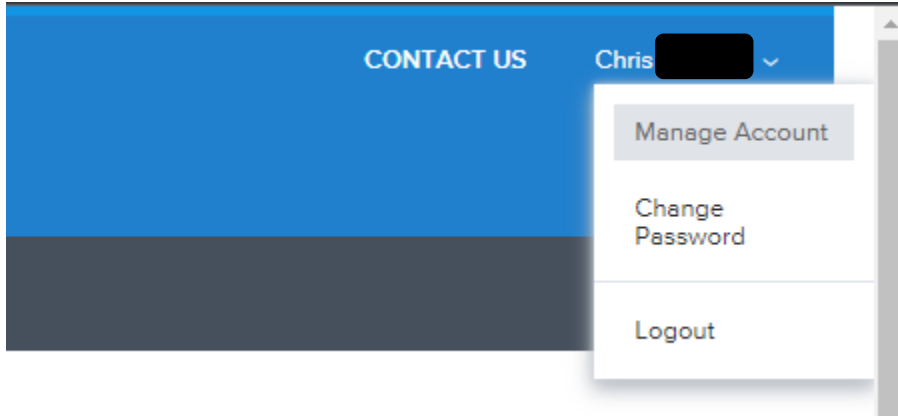


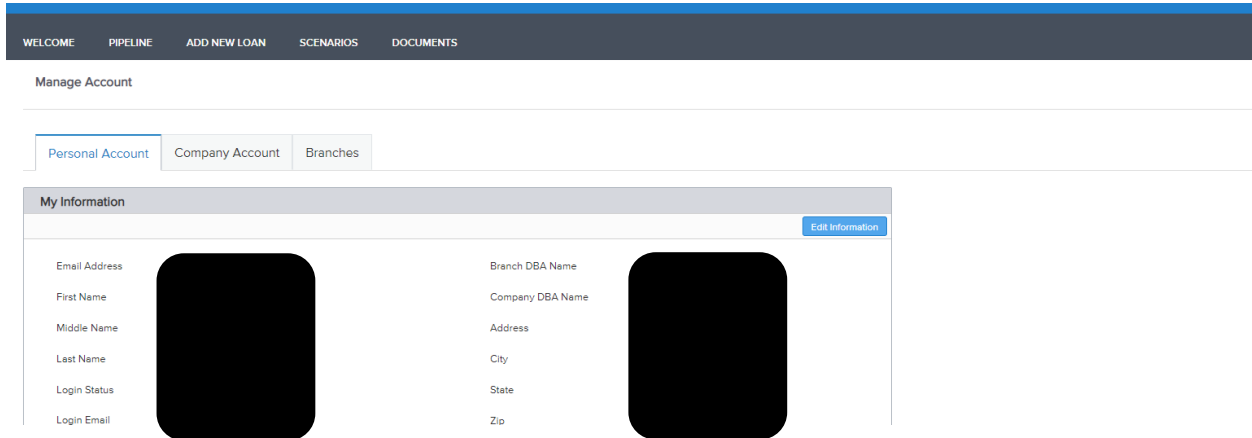


TPO User Creation Guide

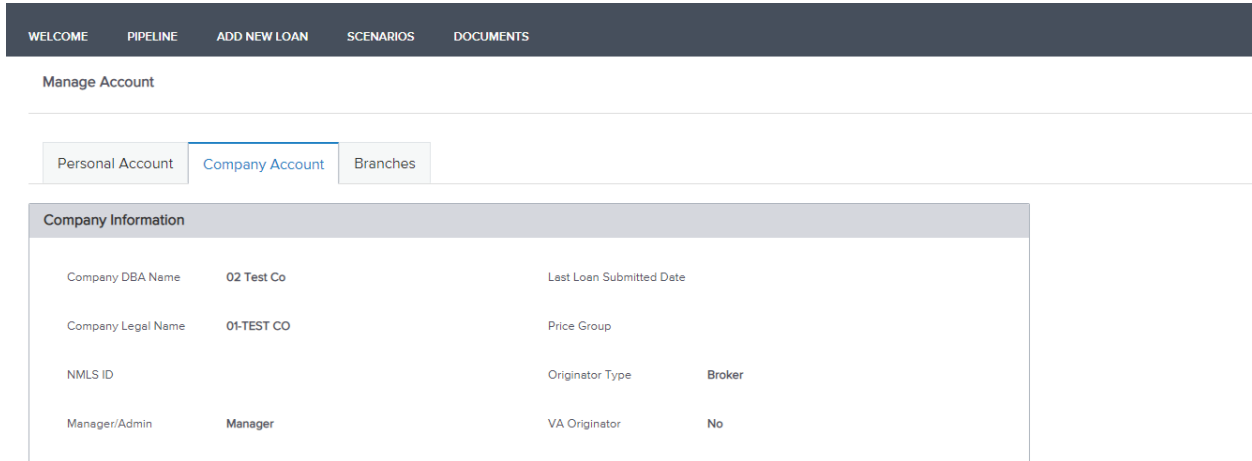
After Logging into the Portal, click on your name in the upper right:



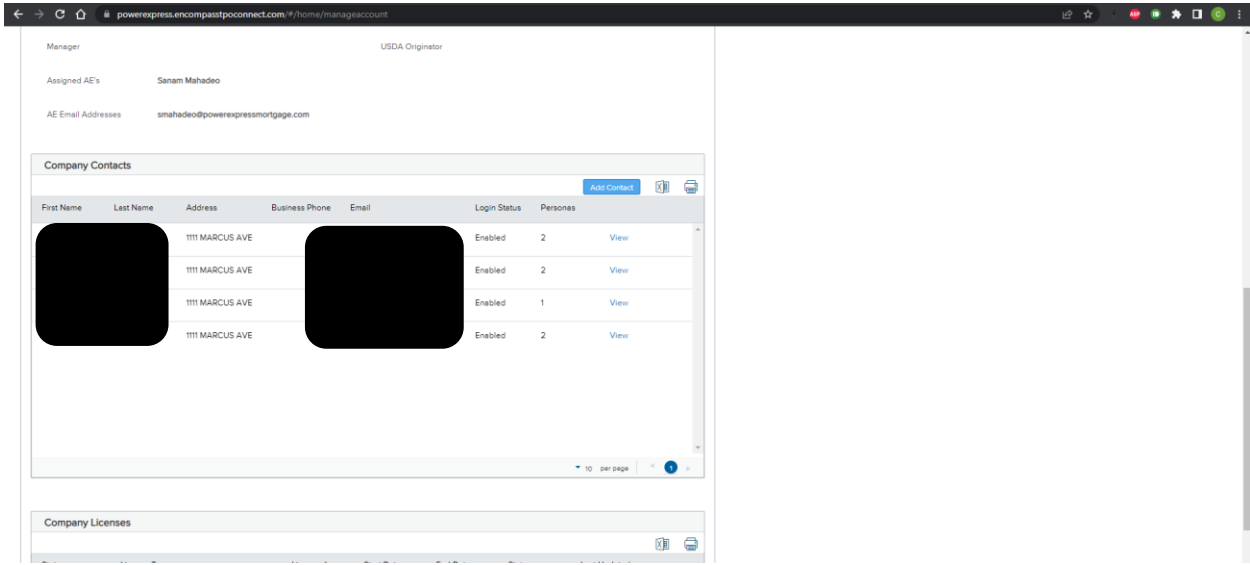
Click 'Manage Account' to open your account settings page:



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



Scroll to the Company Contacts section here:



Click on Add Contact to open the new user screen:

Create New Contact

* Email Address

* First Name

Middle Name

* Last Name

Login Status: Enabled

* Login Email Address

NMLS ID

Social Security #

* Organization

Use Company Address

Address

City

* State

Zip -

Business Phone Ext.

Business Fax Ext.

Cell Phone

* Personas

View access to team's loans

Edit team's loans

Assigned AE: Sanam Mahadeo

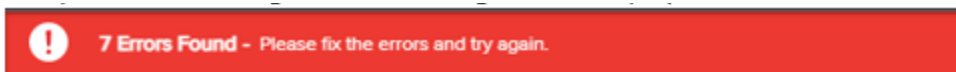
Record Last Updated: 8/11/22 10:30:18

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
 - 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:



*Email Address 
! This is a required field.

*First Name
! This is a required field.