Portal Web Admin

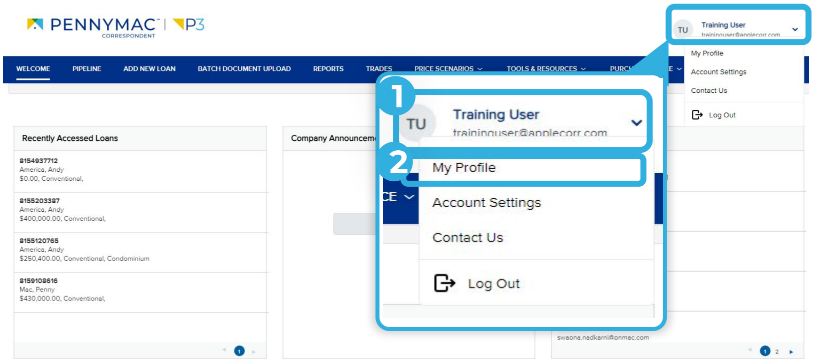
JOB AID (Non Delegated)

This Job Aid walks you through the functions available for the Admin Role in the new Portal. You will also find a step by step on how to perform each function.

A Follow the next steps create a new user:

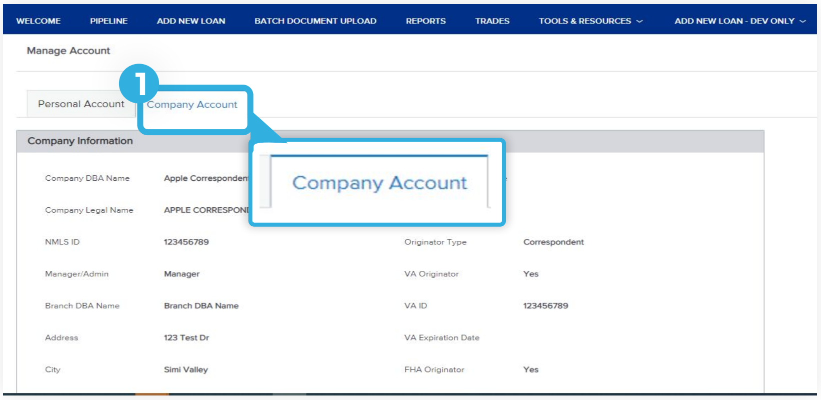
1. After logging into the portal, click on your user name in the upper right corner.
2. Once drop-down menu displays, click on the My Profile button.

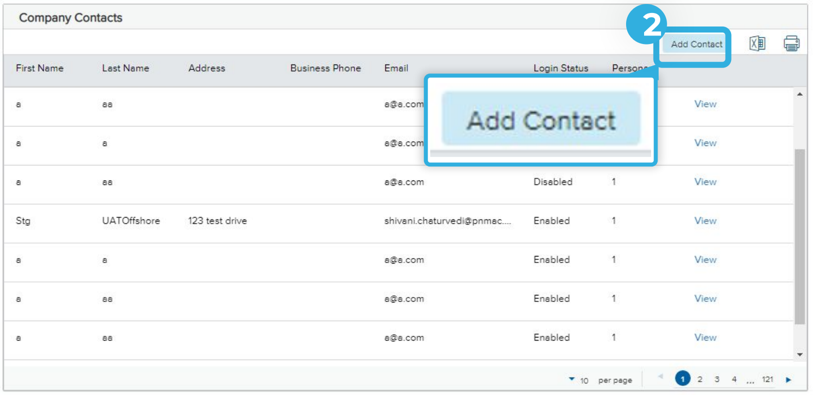
Remember! Only an Admin Role user can create new users in the system



B Once in the *Manage Account* window:

1. Click the *Company Account* tab.
2. Scroll down and click the Add Contact button in the Company Contacts section





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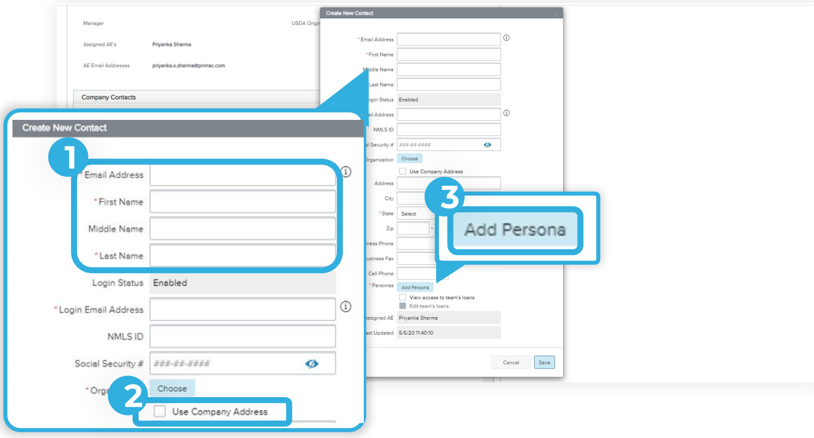
Create New Contact window displays.

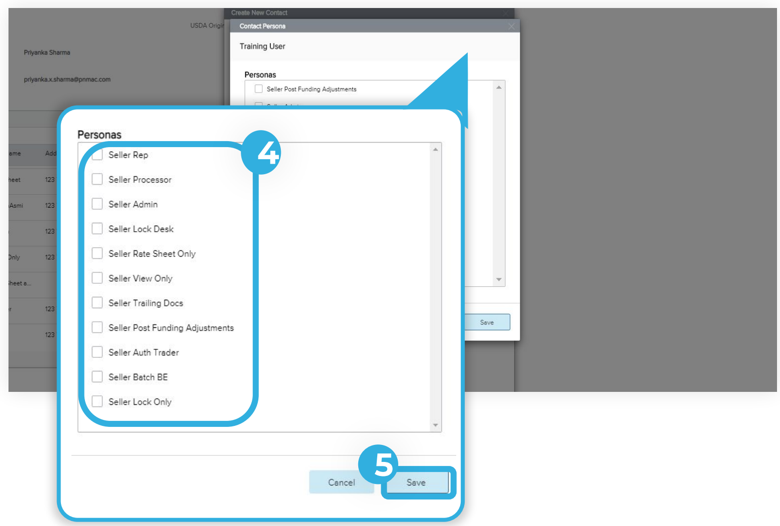
1. Enter the required information in the following fields:
    - Email address
    - First and last name
    - Login Email address
    - Organization
2. Select Use Company Address check box to fill it with the selected organization' s address or type a different one manually.
3. Click the Add Persona button to select the type of access for the new user.
4. Select the Persona for the user. More than one Persona may be selected.
5. Click the Save button.
6. If the user needs to access all of the company's loans, check the View access to team's loans and Edit team's loans boxes. .

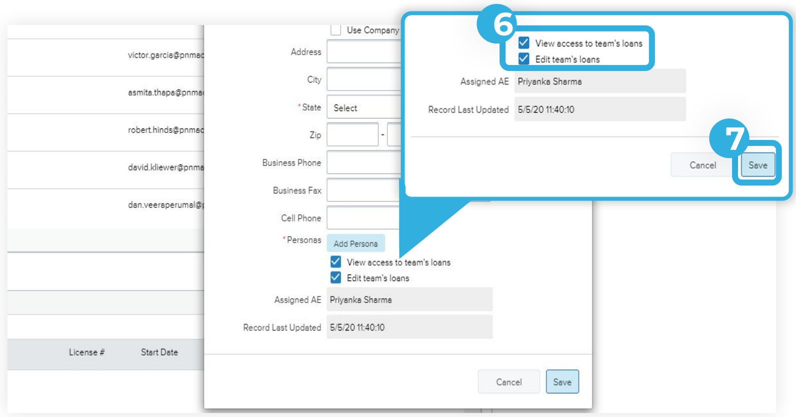
This allows the user to access all the company's loans, otherwise users will only have access to loans they personally created.

In the event you do wish to restrict a user's access to only loans created by that user and not your entire pipeline (e.g. in the case of a LO or LP), leave the boxes unchecked.

7. Click Save button.



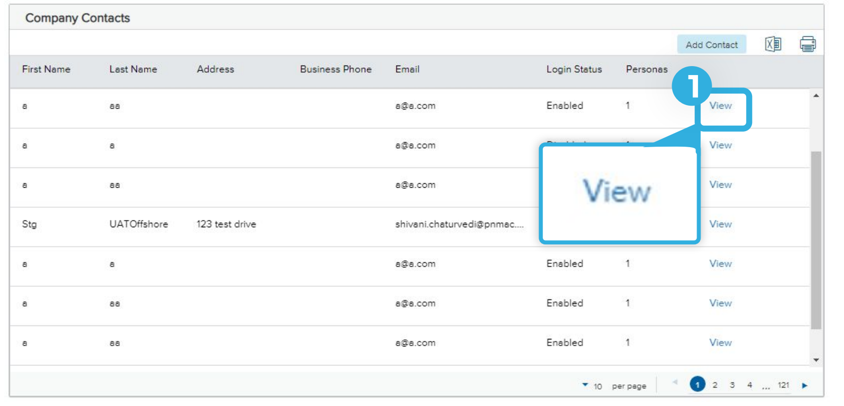


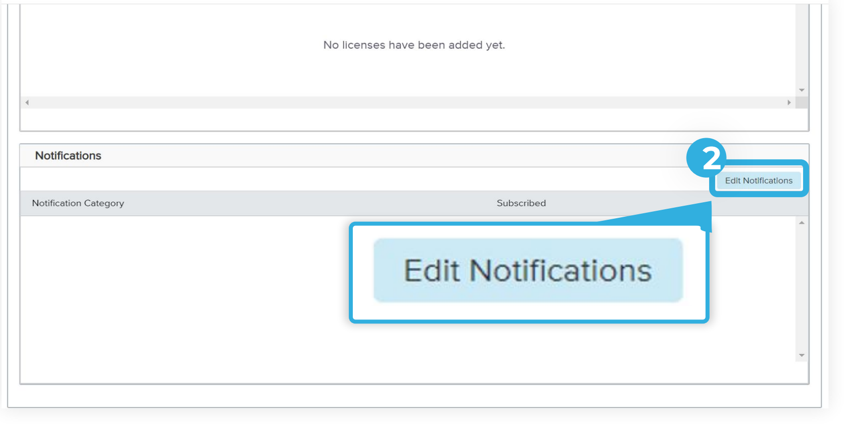


Now, let's review how to setup user's notifications:

A Back on the Company Contacts section:

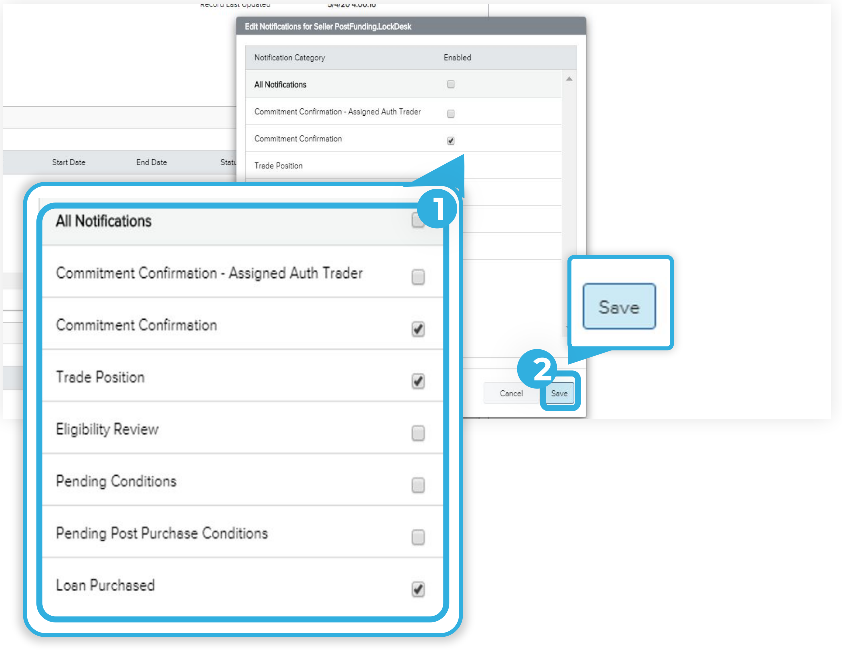
1. Select "View" field on the user to disable access.
2. Scroll down and click the Edit Notifications button in the Notifications section.





B Once the *Edit Notifications* window displays:

1. Check all the needed boxes to enable email Notifications.
2. Click Save button



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On the following sections, we will go over User Roles and their assigned functions per user role:

USER ROLES

SELLER ADMIN

- Administration
- View Pricing
- Lock Loans
- Register Loans
- View Pipeline
- Upload & Submit Docs
- View Rate Sheets
- Submit Trailing Docs
- Request Post Funding Adjustments

SELLER REP

- Register Loans
- View Pipeline
- Upload & Submit Docs
- Batch Document Upload
- Reports

SELLER PROCESSOR

- View Pricing*
- Register Loans
- View Pipeline
- Trade Management
- Reports
- Upload & Submit Docs
- Batch Document Upload
- Trailing Docs
- View Purchase Advice

*On locked/allocated loans only

SELLER LOCK ONLY

- View Pricing
- Lock Loans
- View Pipeline

*This is a supplement to the Seller Rep role to allow the Seller Rep to lock loans.

SELLER RATE SHEET ONLY

- Rate Sheet
- Receive Rate Sheet Notification

SELLER LOCK DESK

- View Pricing
- Lock Loans
- Register Loans
- View Pipeline
- Trade Management
- Upload & Submit Docs
- Batch Document Upload
- Reports
- View Purchase Advice
- View Rate Sheets
- Post Funding Requests
- View Trailing Docs

SELLER VIEW ONLY

- View Pricing*
- View Pipeline
- View Trades
- View Documents / Conditions
- View Reports
- View Purchase Advice

*On locked/allocated loans only

SELLER TRAILING DOCS

- View Trailing Docs

POST FUNDING ADJUSTMENTS

- Post Funding Requests