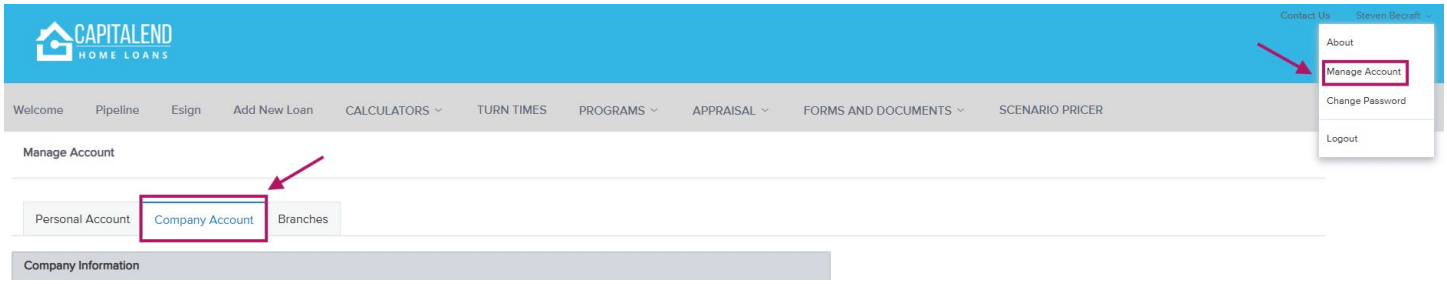
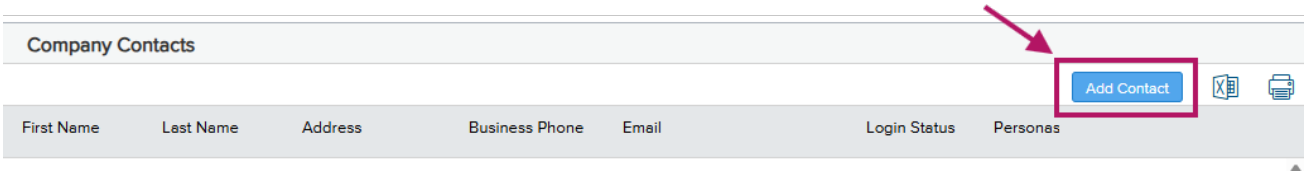
Broker Administration: Creating New Users

If you have the 'WHL Admin' persona, you have access to create and manage user accounts for your company. When logged in to the TPOC Portal, click the caret to the right of your name in the upper right-hand corner. If you see 'Manage Account', you have admin access. Users who do not see this option do not have admin access. Click 'Manage Account' then click the 'Company Account' tab:



Scroll down to 'Company Contacts' and click 'Add Contact':



Complete all applicable 'Create New Contact' fields to accurately set up the user.

IMPORTANT: If you receive the error message 'An Error Occurred: Conflict – Login Email is already in use.", this indicates that this user has an existing account under a different company or channel also using that email address. You will still enter their email address in the 'Email Address' field, but you will need to enter a different email address for '**Login** Email Address'. This is ONLY used for login purposes as their User Name.

An easy solution to this would be to add 'whl' in the body of their login email address:

You are free to make any other username so long as you retain the email address format.
I.e.: Processor_Whl@yourcompany.com or WhlLO@yourcompany.com would both suffice.

Enter their business phone number and **enter their cell phone number for two factor authentication**. Please confirm the accuracy of these data points.

Click 'Choose' next to Organization and select/save the Corporate Office. Check 'Use Company Address'.

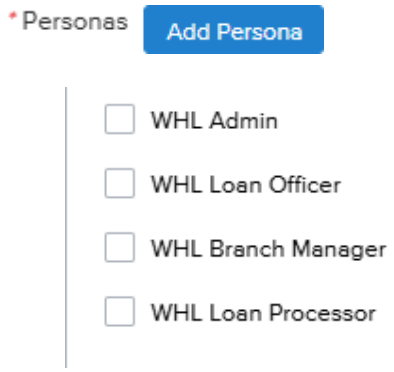
CAPITALEND HOME LOANS

Create New Contact

* Email Address	loanofficerorprocessor@yourcompany.com
* First Name	Joe
Middle Name	
* Last Name	Loan
Login Status	Enabled
* Login Email Address	loanofficerorprocessor@yourcompany.com
NMLS ID	1234567
Social Security #	###-##-####
* Organization	Choose
	☐ Use Company Address
Address	
City	
* State	California
Zip	-
Business Phone	Ext.
Business Fax	Ext.
Cell Phone	
* Personas	Add Persona
	☐ View access to team's loans
	☐ Edit team's loans
Assigned AE	
Record Last Updated	

Cancel Save

Click 'Add Persona' next to Personas and choose/save the user's assigned role(s). Only the personas listed below will apply to the wholesale channel. Adding any additional personas that may be listed will not result in any functionality.

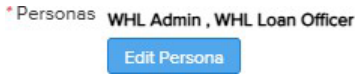


*WHL Admin – responsible for creating new users and adjusting roles/access. Use discretion when granting this persona. Most companies only have 1 or 2 admins.

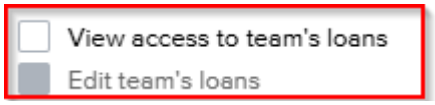
WHL Loan Officer – licensed MLO under state or federal SAFE Acts. If an LO prices/locks their own loans, access to View or Edit Team's loans should not be selected. If an LO processes their own loans, the processor role should be selected as well.

WHL Loan Processor – responsible for preparing, organizing, and submitting loan files but is not always licensed. A processor may not originate without a SAFE Act mortgage loan originator license.

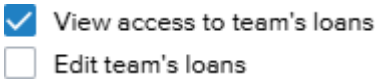
The chosen persona(s) will be listed and can be edited, if necessary:



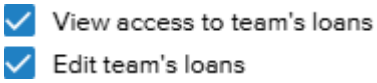
Finally, choose the user's loan access:



- Making no choice will result in the user only having access to view and edit loans that they are explicitly assigned to
- Check 'View access to team's loans' if they should only view loans that they are not assigned to



- Check 'Edit team's loans' if they should be able to edit loans that they are not assigned to



Click 'Save' at the bottom to create the user and send their Welcome Email.