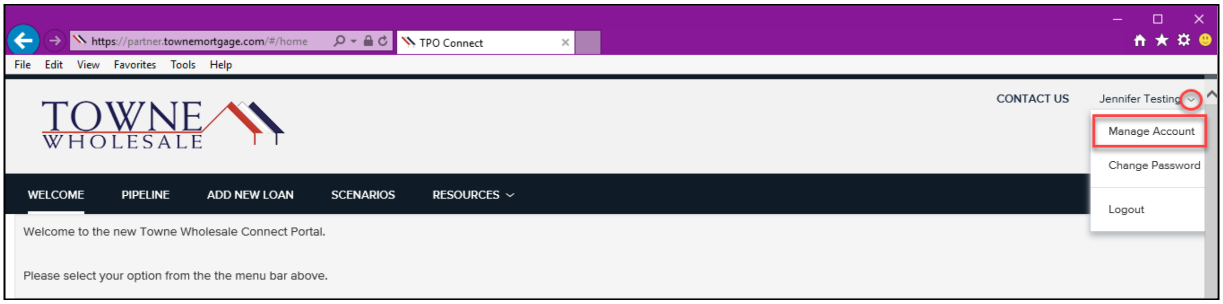
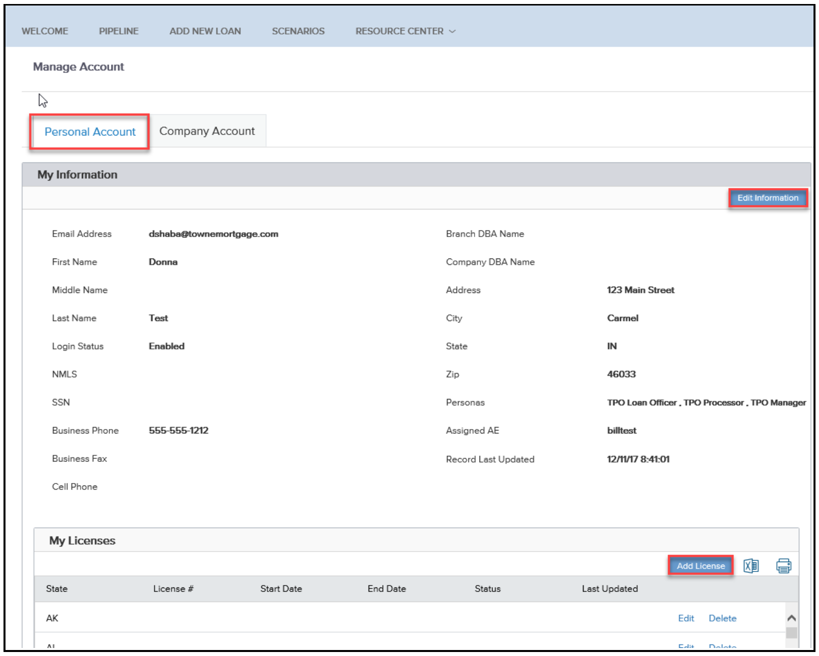
HOW TO: Add Users to TPO Connect

If you are set-up as a TPO admin for your company, you have the ability to add new users to your TPO Connect account. Follow the steps below to add new users.

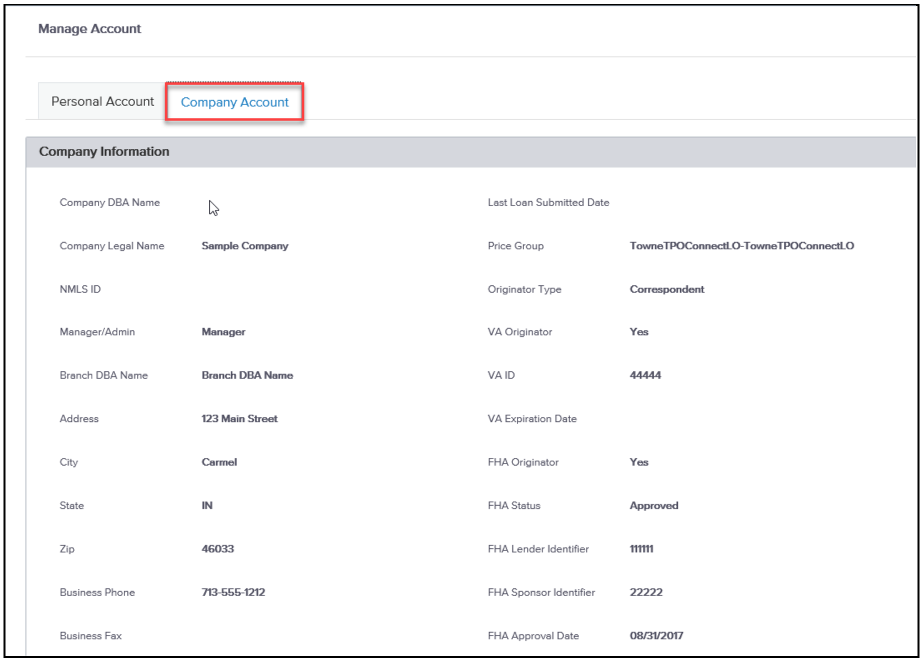
Step 1: In the top, right-hand corner of the webpage, click on the dropdown next to your username and select “Manage Account”.



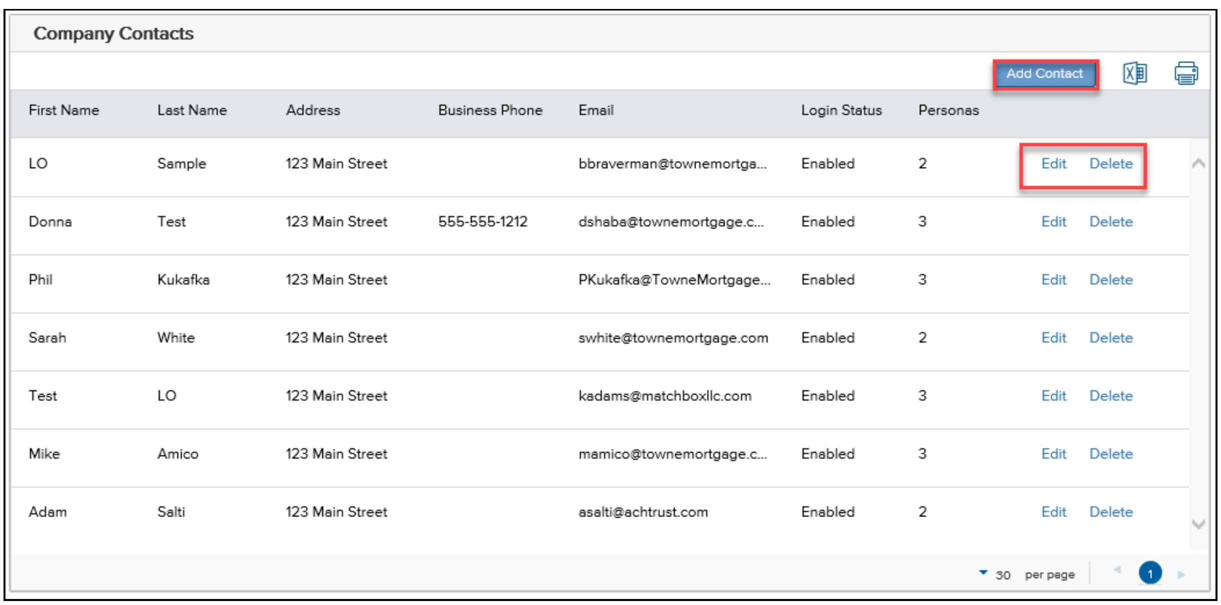
Step 2: You will be taken to a screen where you can edit your current information on the “Personal Account” tab.



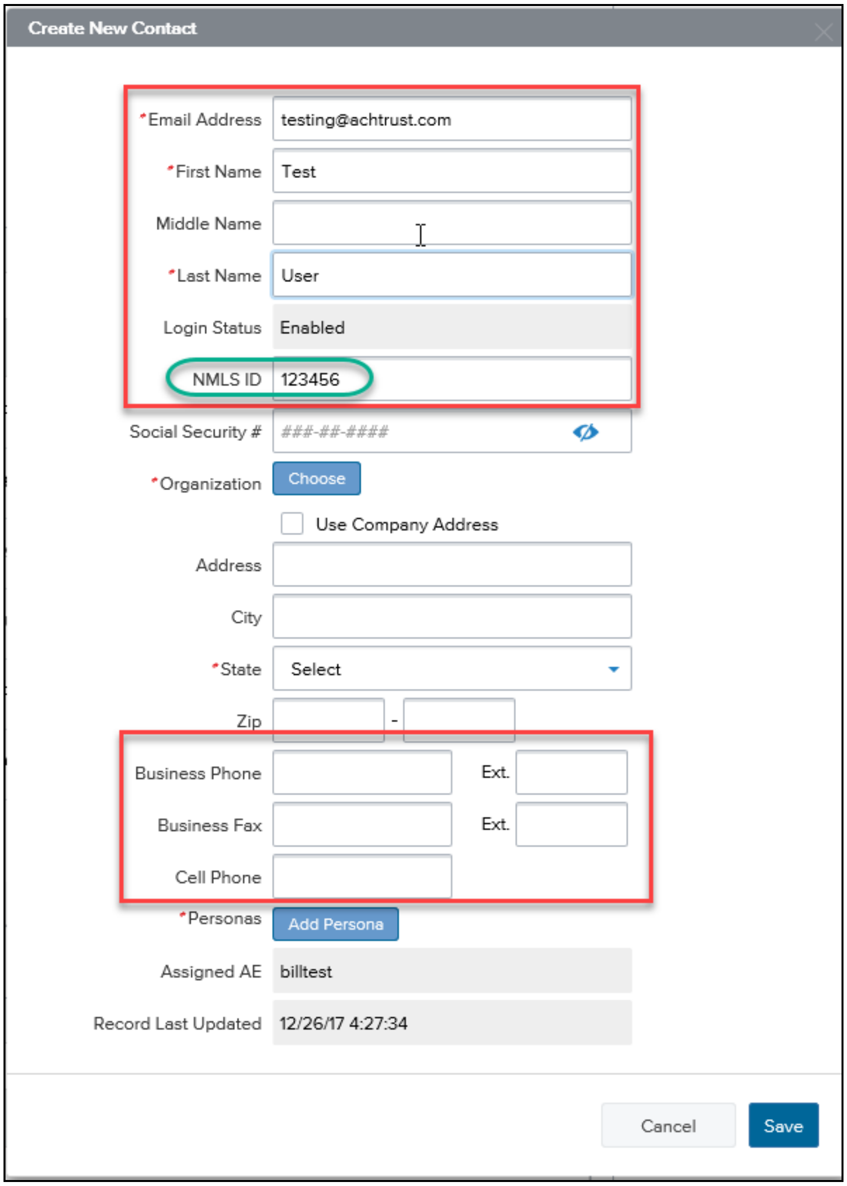
Step 3: Click on the “Company Account” tab to review the company information



Step 4: Just under the Company Account information is the Company Contacts where you can edit, delete, or Add new contacts.

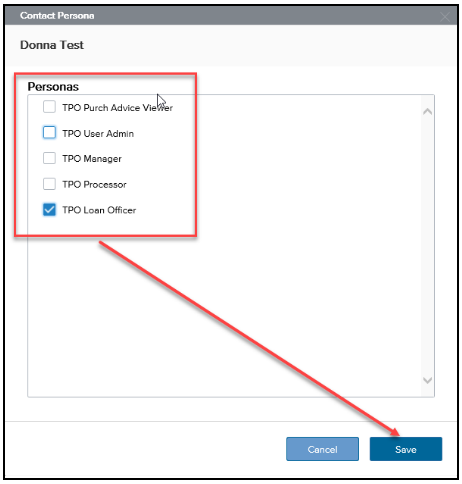


Step 5:	When you click the “Add Contact” button, the Create New Contact screen will appear allowing you to input the new user information.
NOTE:	**Make sure you add an NMLS ID for any user who will be creating new loans in TPO Connect. If the user doesn’t have their own NMLS (i.e. Processor), add the company’s NMLS in this section.**

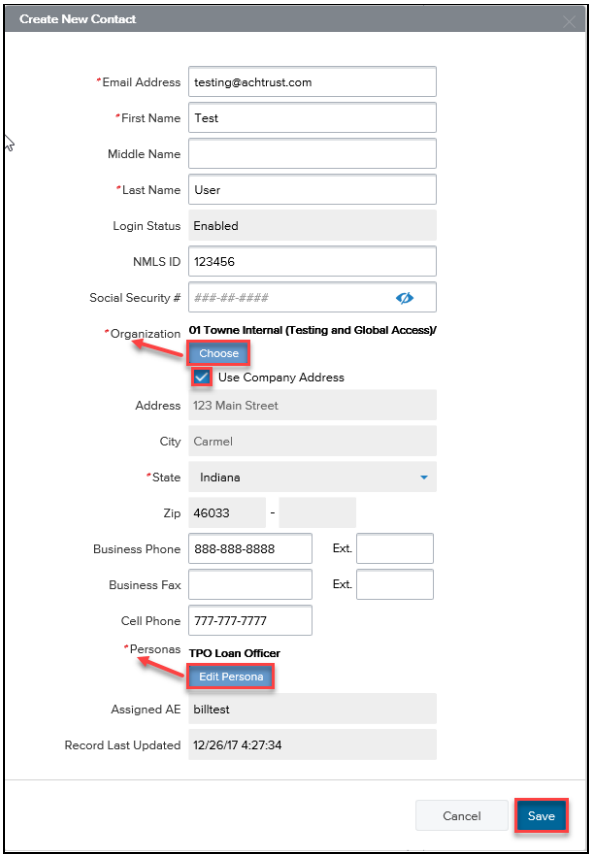


Step 6:	Use the “Choose” button to populate the company name.
Step 7:	Click the “Use Company Address” to populate the address information.

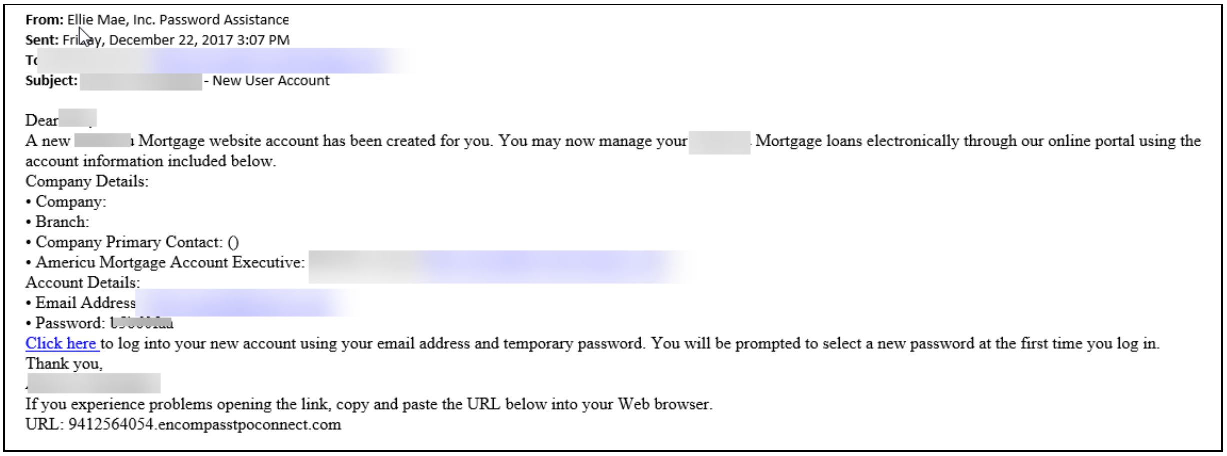
Step 8: Use the "Edit Persona" to select the appropriate persona/title for the new user. You can select as many personas that would apply to your new user.



Step 9: Once you have verified that all the information is accurate, click "Save" to create the new user.



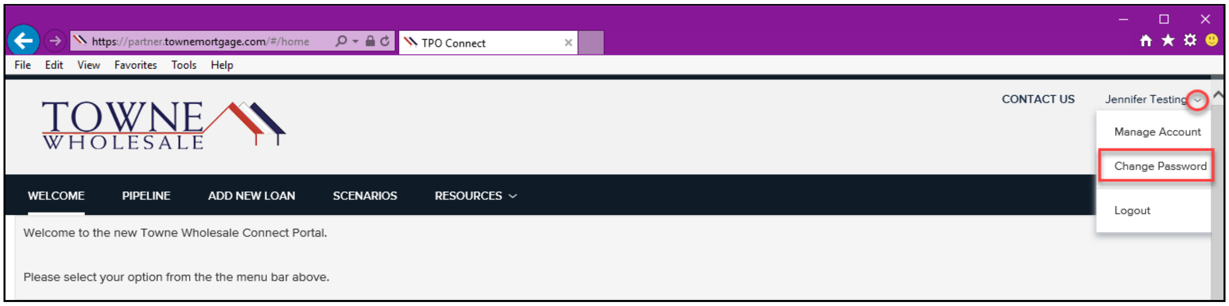
Step 10: Once the new user is created, they will receive an email with their temporary password.


From: Ellie Mae, Inc. Password Assistance
Sent: Friday, December 22, 2017 3:07 PM
To:
Subject: - New User Account

Dear ,
A new Mortgage website account has been created for you. You may now manage your Mortgage loans electronically through our online portal using the account information included below.
Company Details:
• Company:
• Branch:
• Company Primary Contact: ()
• Americu Mortgage Account Executive:
Account Details:
• Email Address
• Password:
Click here to log into your new account using your email address and temporary password. You will be prompted to select a new password at the first time you log in.
Thank you,

If you experience problems opening the link, copy and paste the URL below into your Web browser.
URL: 9412564054.encompasstpoconnect.com

Step 11: Once the new user receives this email, they need to login and access the "Change Password" function from the dropdown in the top, right-hand corner of the webpage.



NOTE: **If an employee has left the company, you have two options to deactivate their account. You can "delete" the account from the Company Contacts section (shown in step 4), OR you can disable the account using the edit function (also shown in step 4) and updated the "Login Status" from Enabled to Disabled.**