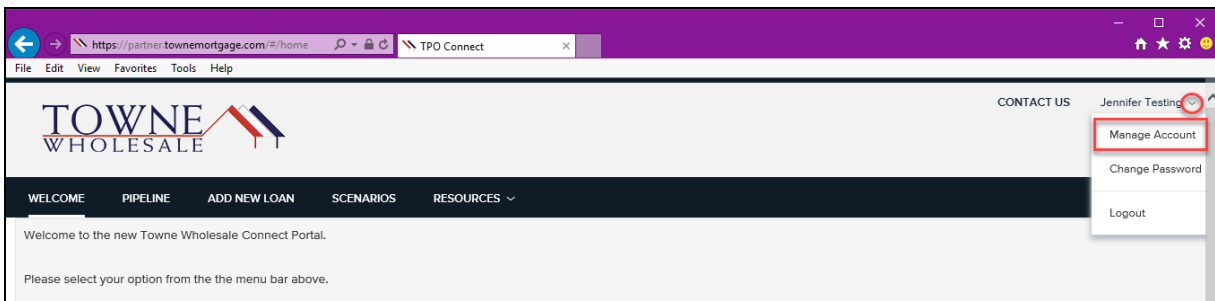




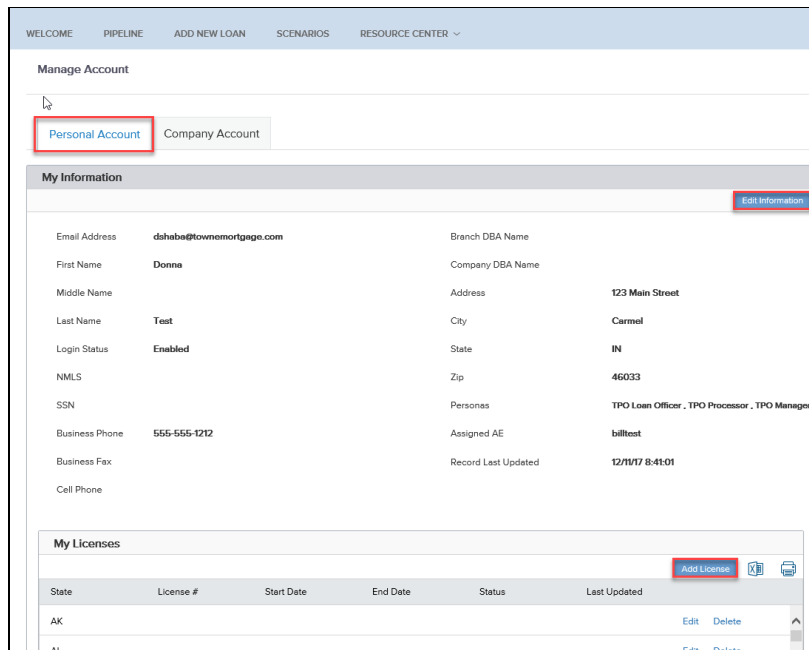
## HOW TO: Add Users to TPO Connect

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

Manage Account

Personal Account **Company Account**

**Company Information**

Company DBA Name		Last Loan Submitted Date	
Company Legal Name	Sample Company	Price Group	TowneTPOConnect.LO-TowneTPOConnect.LO
NMLS ID		Originator Type	Correspondent
Manager/Admin	Manager	VA Originator	Yes
Branch DBA Name	Branch DBA Name	VA ID	44444
Address	123 Main Street	VA Expiration Date	
City	Carmel	FHA Originator	Yes
State	IN	FHA Status	Approved
Zip	46033	FHA Lender Identifier	11111
Business Phone	713-555-1212	FHA Sponsor Identifier	22222
Business Fax		FHA Approval Date	08/31/2017

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

Company Contacts

Add Contact

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
LO	Sample	123 Main Street		bbraverman@townemortga...	Enabled	2	Edit Delete
Donna	Test	123 Main Street	555-555-1212	dshaba@townemortgage.c...	Enabled	3	Edit Delete
Phil	Kukafka	123 Main Street		PKukafka@TowneMortgage...	Enabled	3	Edit Delete
Sarah	White	123 Main Street		swhite@townemortgage.com	Enabled	2	Edit Delete
Test	LO	123 Main Street		kadams@matchboxllc.com	Enabled	3	Edit Delete
Mike	Amico	123 Main Street		mamico@townemortgage.c...	Enabled	3	Edit Delete
Adam	Salti	123 Main Street		asalti@achtrust.com	Enabled	2	Edit Delete

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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.

The screenshot shows the 'Create New Contact' form with the following fields and values:

- \*Email Address: testing@achtrust.com
- \*First Name: Test
- Middle Name: (empty)
- \*Last Name: User
- Login Status: Enabled
- NMLS ID: 123456 (highlighted with a green circle)
- Social Security #: ###-##-####
- \*Organization: Choose
- Use Company Address
- Address: (empty)
- City: (empty)
- \*State: Select
- Zip: (empty)
- Business Phone: (empty) Ext.: (empty)
- Business Fax: (empty) Ext.: (empty)
- Cell Phone: (empty)
- \*Personas: Add Persona
- Assigned AE: billtest
- Record Last Updated: 12/26/17 4:27:34

Buttons: Cancel, Save

Step 6: Use the “Choose” button to populate the company name.

Step 7: Click the “Use Company Address” to populate the address information.

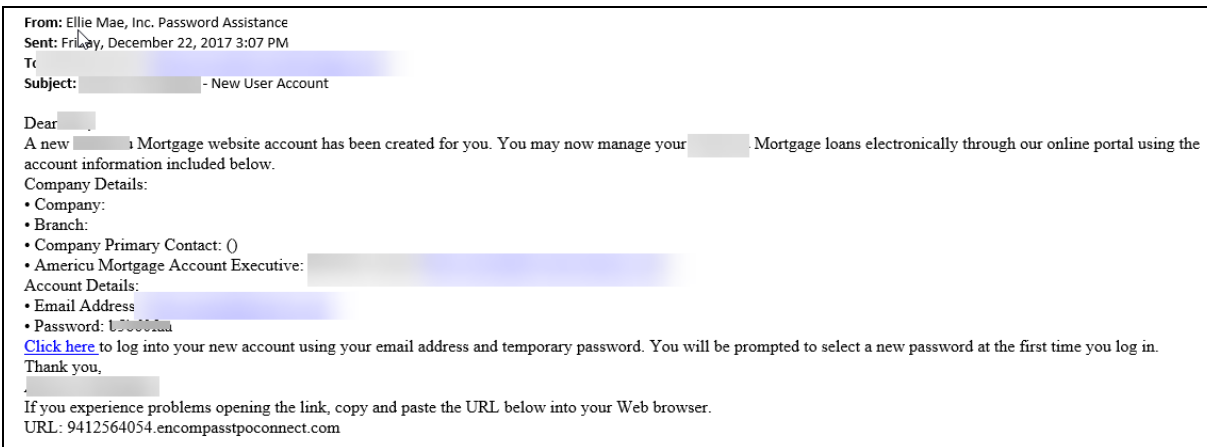
Step 8: Use the “Edit Persona” to select the appropriate persona/title for the new user. You can select as many personas that would apply to your new user.

The screenshot shows a dialog box titled "Contact Persona" for a user named "Donna Test". It contains a list of personas with checkboxes: "TPO Purch Advice Viewer", "TPO User Admin", "TPO Manager", "TPO Processor", and "TPO Loan Officer". The "TPO Loan Officer" checkbox is checked. A red box highlights the list, and a red arrow points from it to the "Save" button at the bottom right.

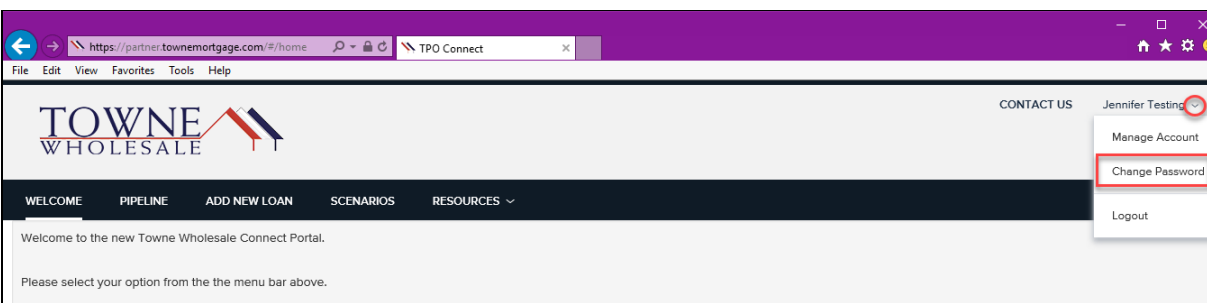
Step 9: Once you have verified that all the information is accurate, click “Save” to create the new user.

The screenshot shows the "Create New Contact" form. Fields include: Email Address (testing@achtrust.com), First Name (Test), Middle Name, Last Name (User), Login Status (Enabled), NMLS ID (123456), Social Security # (masked), Organization (01 Towne Internal (Testing and Global Access)), Address (123 Main Street), City (Carmel), State (Indiana), Zip (46033), Business Phone (888-888-8888), Business Fax, Cell Phone (777-777-7777), and Assigned AE (billtest). The "Personas" dropdown is set to "TPO Loan Officer". The "Save" button is highlighted with a red box.

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



**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.

