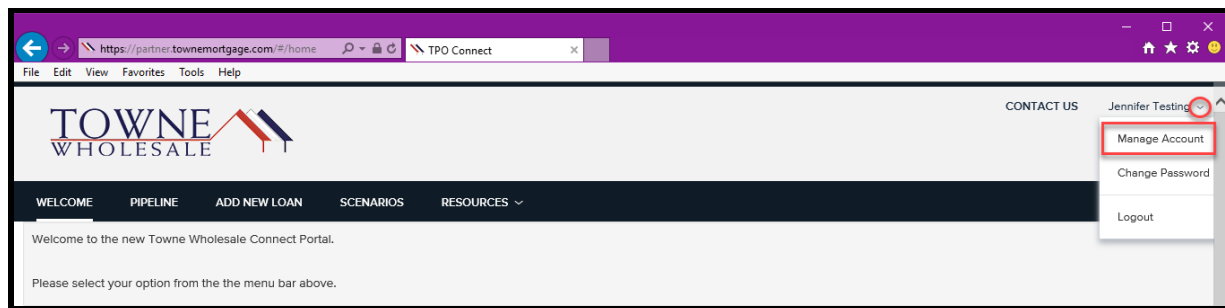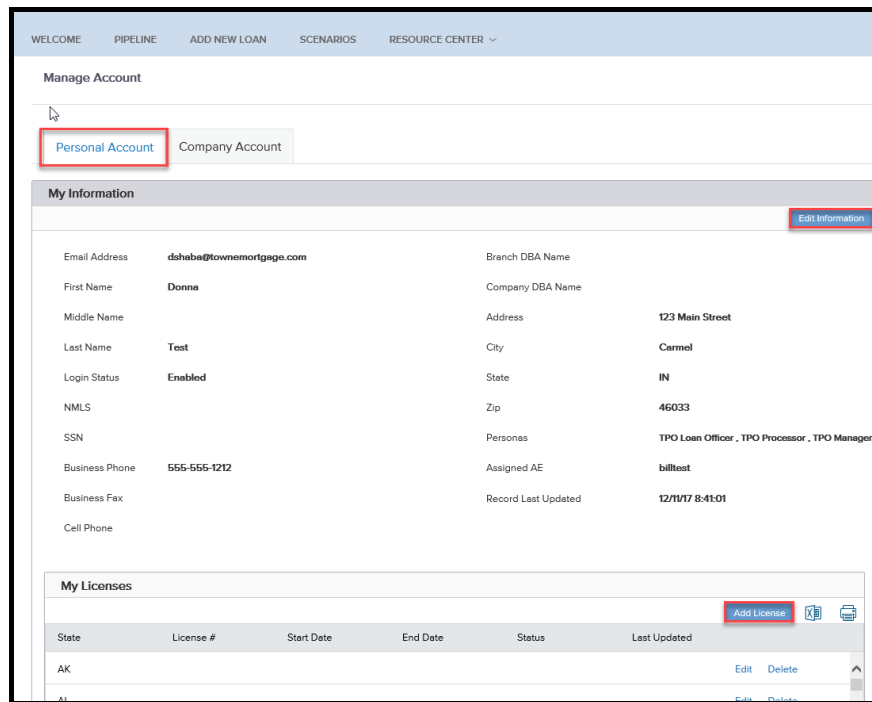# HOW TO: Add Users to TPO Connect

If you are set-up with the "Administration Rights" persona 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 Add, or View/Edit contacts.

NOTE: **Do NOT use the Delete Function for users who are assigned to a loan. This could cause the loan to be inaccessible in TPO Connect. If an employee has left the company, deactivate their account by disabling the account using the edit function (shown in step 4) and update the "Login Status" from Enabled to <u>Disabled</u>. (See end of the Job Aid for the instructions to <u>Disable</u>).**

TO EDIT USERS:

- Click on "VIEW" for the desired user and the Contact Detail Window will appear.
- Click "Edit Information"

- The Edit Window will populate to update and save changes.

Add New Users to TPO Connect

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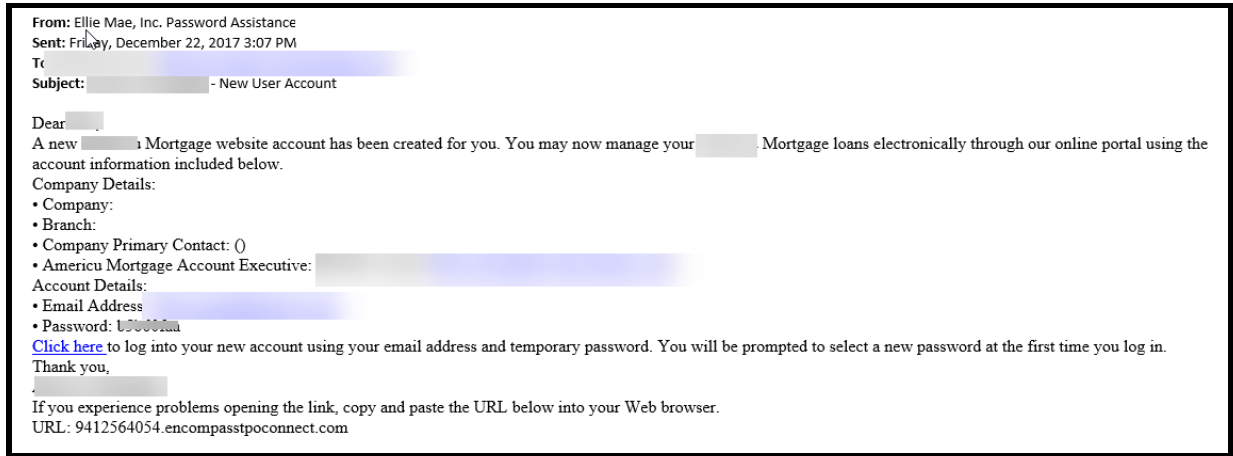
Step 11:   Once the new user receives this email, they need to login and access the "Change
                            Password" function from the dropdown in the top, right-hand corner of the
                            webpage.

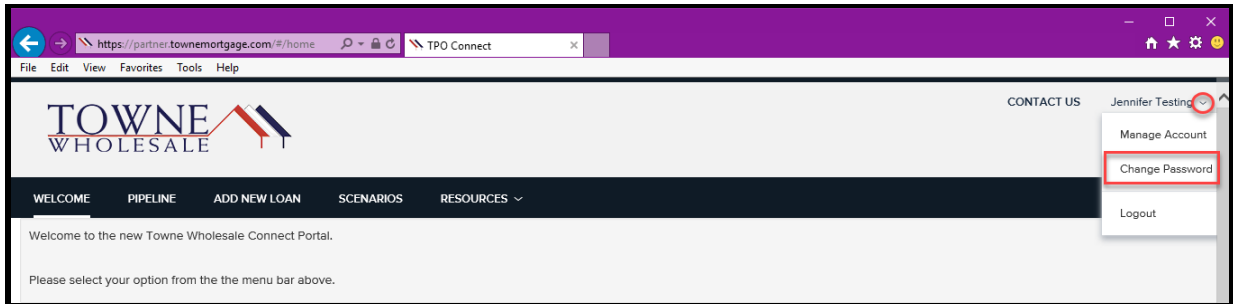NOTE: **If an employee has left the company, deactivate their account by disabling
                            the account using the edit function (shown in step 4) and update the "Login
                            Status" from Enabled to** <u>**Disabled**</u>**.**

                            **Do NOT use the Delete Function for users who are assigned to a loan. This
                            could cause the loan to be inaccessible in TPO Connect.**