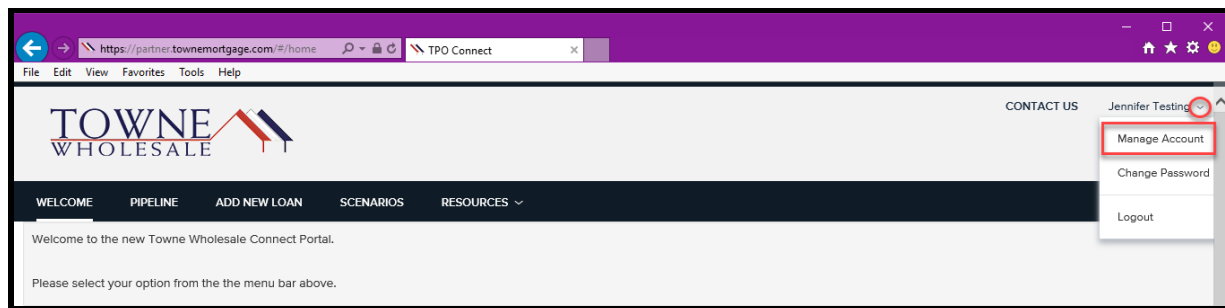




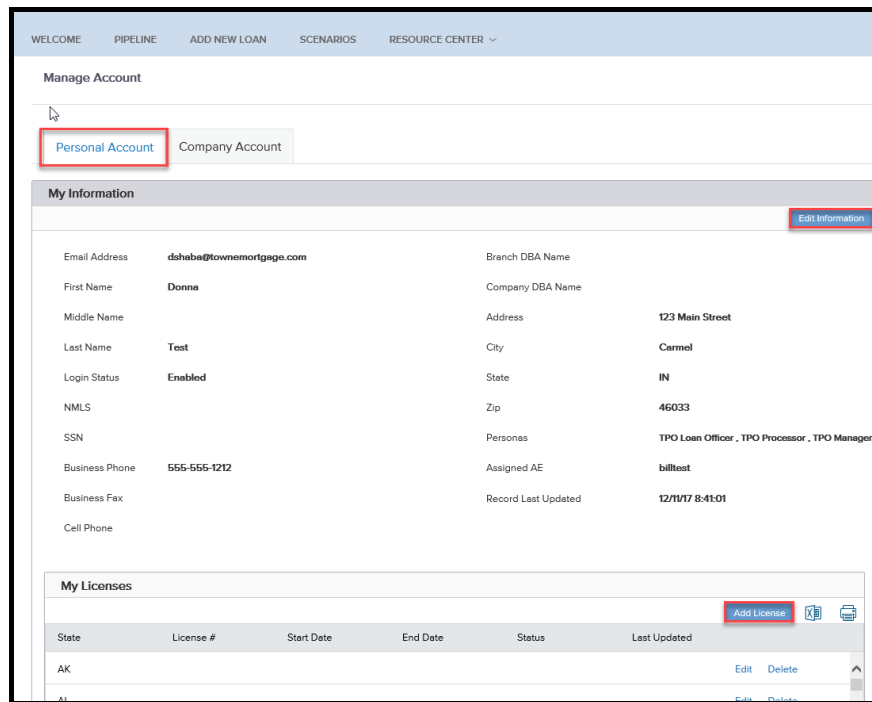
## HOW TO: Add Users to TPO Connect

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.



# Add New Users to TPO Connect

**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	TowneTPOConnectLO-TowneTPOConnectLO
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	111111
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 Add, or View/Edit contacts.

Company Contacts

Add Contact

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
Jenae	Whipple	2170 E Big Beaver		jwhipple@townemortgage...	Enabled	3	View Delete
Jennifer	Testing	2170 E Big Beaver	248-555-9000	jennifer.drouin@townemort...	Enabled	3	View Delete
Donna	Testing	2170 E Big Beaver		Donna.Shaba@townemortg...	Enabled	3	View Delete
Elle	Testing	2170 E Big Beaver		chris.fernandez@ellieuae.c...	Disabled	4	View Delete
eric	mandel	2170 E Big Beaver		emandel@townemortgage...	Enabled	3	View Delete
Bill	Braverman	2170 E Big Beaver		bill.braverman@townemort...	Enabled	3	View Delete

30 per page 1

**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 **Disabled**. (See end of the Job Aid for the instructions to **Disable**).

# Add New Users to TPO Connect

## TO EDIT USERS:

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

Personal Account | **Company Account** | Branches

[Back to Company Account](#)

**Contact Details** Edit Information

Email Address	jwhipple@townemortgage.com	Branch DBA Name	
First Name	Jenae	Company DBA Name	
Middle Name		Address	2170 E Big Beaver
Last Name	Whipple	City	Troy
Login Status	Enabled	State	MI

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

WELCOME PIPELINE ADD

Manage Account

Personal Account | **Company Account**

[Back to Company Account](#)

**Contact Details**

Email Address jwhipple@townemortgage.com

First Name Jenae

Middle Name

Last Name Whipple

Login Status Enabled

NMLS

SSN

Business Phone

Business Fax

Cell Phone

Licenses

State License

**Edit Contact Information**

\*Email Address jwhipple@townemortgage.com

\*First Name Jenae

Middle Name

\*Last Name Whipple

Login Status Enabled

NMLS ID

Social Security # #####

Organization 01 Towne Wholesale

Use Company Address

Address 2170 E Big Beaver

City Troy

\*State Michigan

Zip 48083 -

Business Phone Ext.

Business Fax Ext.

Cell Phone

\*Personas TPO Loan Officer , TPO Processor , TPO Manager

View access to team's loans

Edit team's loans

Assigned AE Jennifer Drouin

Record Last Updated 2/21/18 7:13:35

# 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.**

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

- Email Address:** testing@echtrust.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)
- Personals:** Add Personals
- 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.

# Add New Users to TPO Connect

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.

**Contact Persona**  
Jenae Whipple

**Personas**

- DelCorr - View Pricing
- DelCorr - Shipping & Post Closing
- DelCorr - Register & Lock
- TPO Purch Advice Viewer
- Administrative Rights
- TPO Manager
- TPO Processor
- TPO Loan Officer

**Delegated Correspondent Personas**

**Administrative Rights (regardless of Channel)**

**Wholesale/MiniCorr Personas**

Cancel Save

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

**Create New Contact**

\*Email Address testing@echtrust.com

\*First Name Test

Middle Name

\*Last Name User

Login Status Enabled

NMLS ID 123456

Social Security # ###-##-####

\*Organization 01 Towne Internal (Testing and Global Access/ Choose)

Use Company Address

Address 123 Main Street

City Carmel

\*State Indiana

Zip 46033 -

Business Phone 888-888-8888 Ext.

Business Fax Ext.

Cell Phone 777-777-7777

\*Personas TPO Loan Officer

Edit Persona

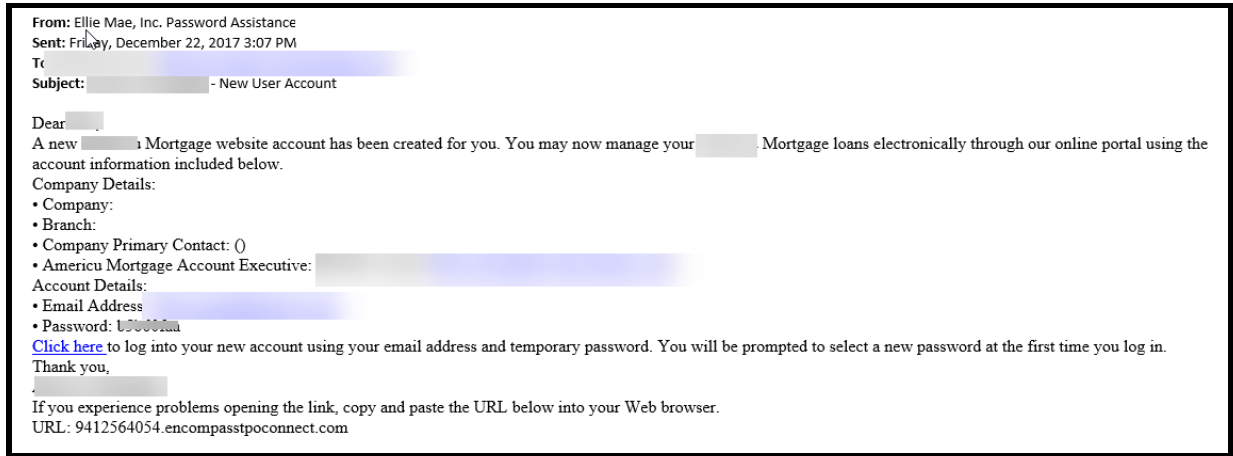
Assigned AE billtest

Record Last Updated 12/26/17 4:27:34

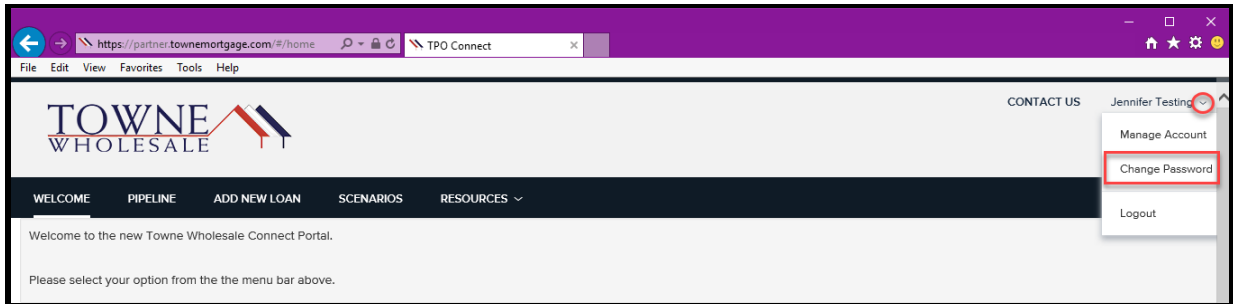
Cancel Save

# Add New Users to TPO Connect

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 Disabled.

**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.**

