

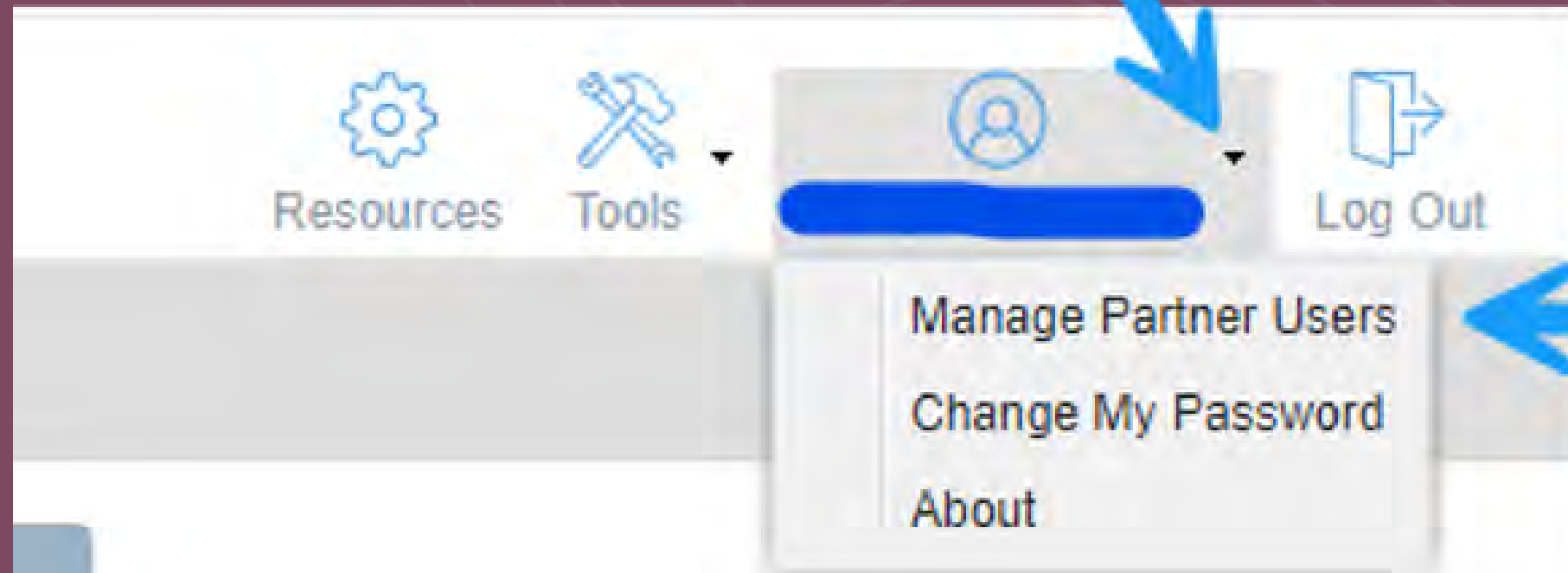


a Mortgage Boutique is a division of first community mortgage

how to create a New User

Manage Partner Users

- As the admin for your company you have the ability to add new users, reset current users, and inactivate any accounts.
- Once logged in click on the down arrow next to the person icon upper right corner of web site and select Manage Partner Users
- Click Add New User button



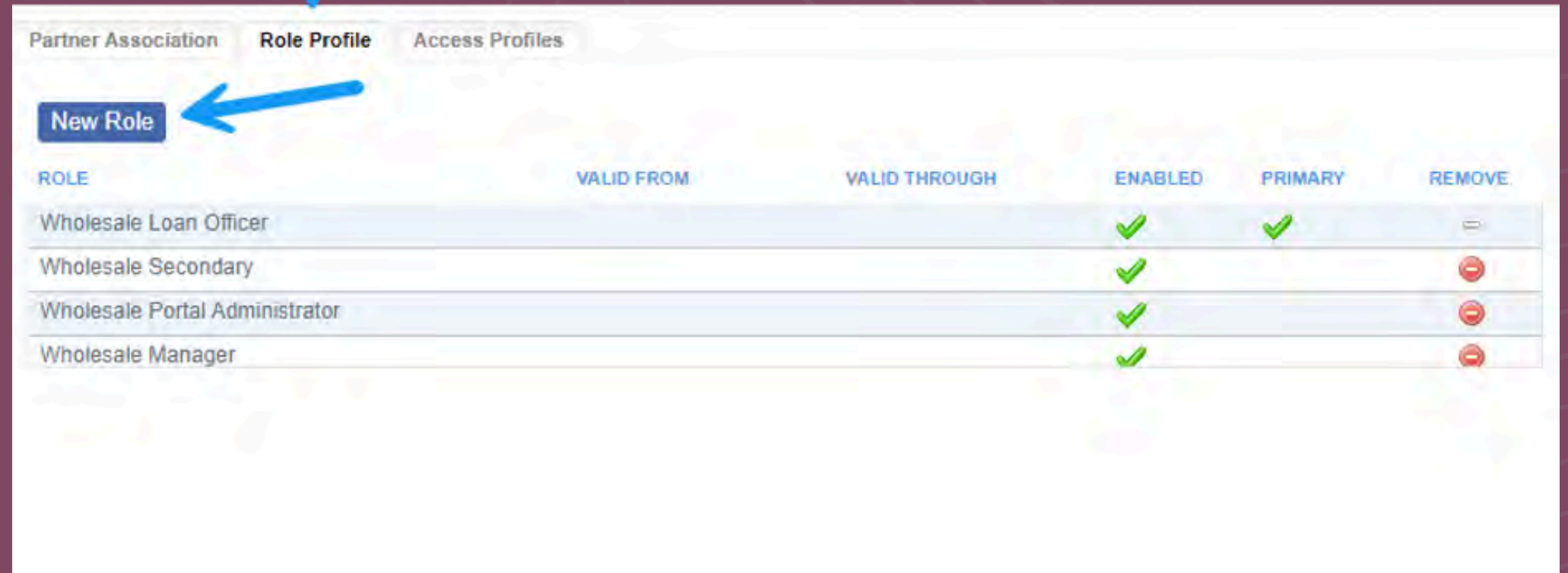
User Information

- Fill in all Red ** on left side and hit save at the bottom of the page.
- We would prefer you use the first initial of the first name and then last name as the user User ID. (For example John Smith would be jsmith) Click the Pencil Icon and enter the Phone Number and Check Preferred. If you see a pop up that indicates NMLS is incorrect please validate the NMLS ID. ** If you want to limit someone access to view only their pipeline and not the entire company pipeline you need to click “limited loan access” button.

The screenshot shows the 'Partner User Maintenance' web application. The interface is split into two main sections. The left section, 'Partner User Maintenance', includes a 'User Set Up' form with fields for User ID, E-Mail, Salutation, First Name, Middle Name, Last Name, NMLS Id, Phone Type, Phone Number, Portal Role, System Access, and Division. There is also a 'Limited Loan Access' checkbox and a 'Password Maintenance' section with a 'Change Password' button and checkboxes for 'Account Locked' and 'Account Enabled'. The right section, 'Partner Association', has tabs for 'Partner Association', 'Role Profile', and 'Access Profiles'. It contains two tables: 'Associated Branches' and 'Add Partner Association', both showing columns for Branch ID, Branch Name, Address, NMLS ID, Branch Type, Status, Primary, and Remove. The 'Add Partner Association' table shows 'Page 0 of 0' and 'No data to display'. Blue arrows point to the 'User ID' field, the 'Phone Number' field with a pencil icon, and the 'Limited Loan Access' checkbox.

Role Profile

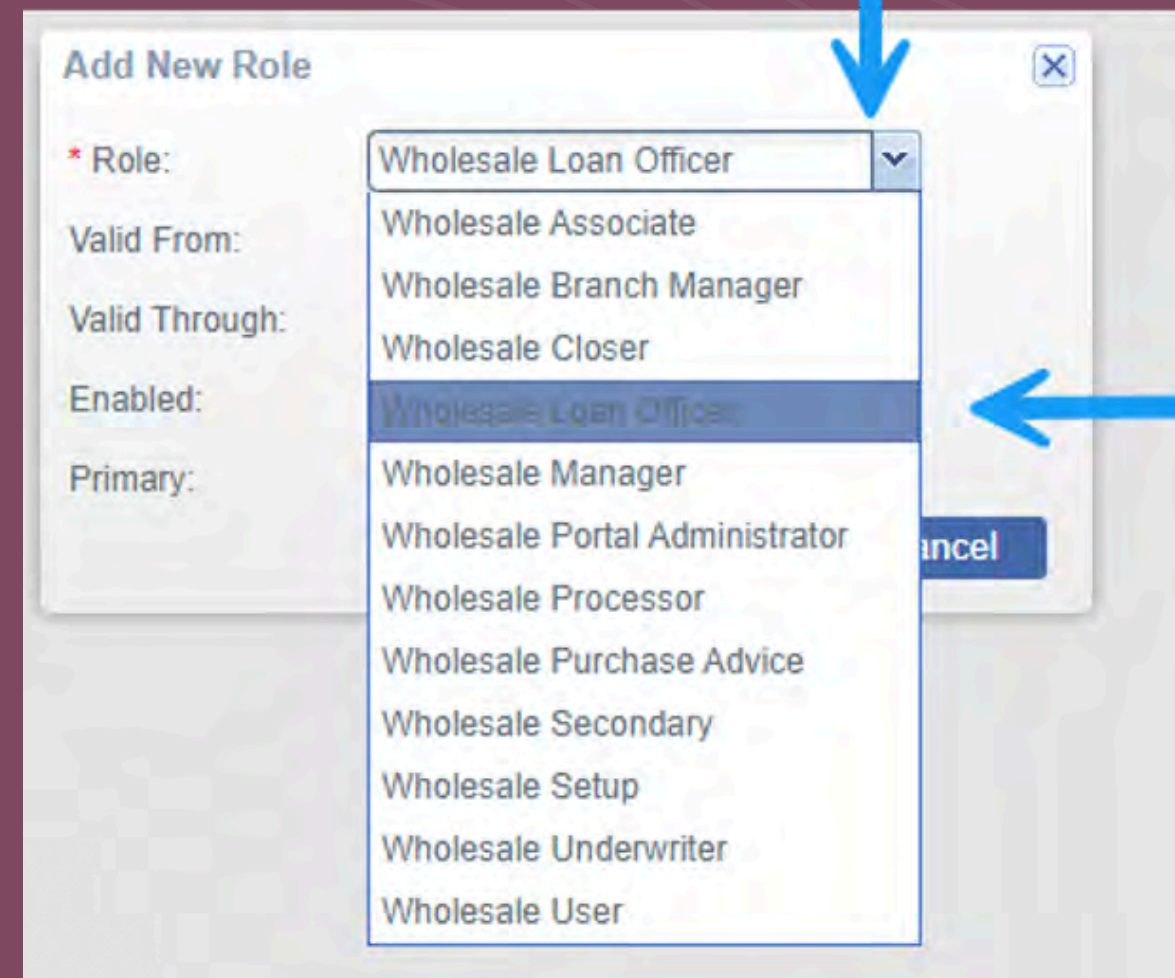
- Once the user has been saved click Role Profile to allow access to files.



Partner Association **Role Profile** Access Profiles

New Role

ROLE	VALID FROM	VALID THROUGH	ENABLED	PRIMARY	REMOVE
Wholesale Loan Officer			✓	✓	⊞
Wholesale Secondary			✓		⊞
Wholesale Portal Administrator			✓		⊞
Wholesale Manager			✓		⊞



Add New Role

* Role: Wholesale Loan Officer

Valid From:

Valid Through:

Enabled:

Primary:

Wholesale Associate

Wholesale Branch Manager

Wholesale Closer

Wholesale Loan Officer

Wholesale Manager

Wholesale Portal Administrator

Wholesale Processor

Wholesale Purchase Advice

Wholesale Secondary

Wholesale Setup

Wholesale Underwriter

Wholesale User

Cancel

Processor

- If a loan originator is processing the loan, they will also need to assigned the processor role their profile.

Partner Association | Role Profile | Access Profiles

New Role

ROLE	VALID FROM	VALID THROUGH	ENABLED	PRIMARY	REMOVE
Wholesale Loan Officer			✓	✓	
Wholesale Secondary			✓		✖
Wholesale Portal Administrator			✓		✖
Wholesale Manager			✓		✖

Add New Role

* Role: Wholesale Processor

Valid From:

Valid Through:

Enabled:

Primary:

Save Cancel

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