

Adding Users to TPO Connect

For other users to gain access to the website, your Company's Administrator must create a contact record for each user.

To Create a Contact Record

1. Click your username in the top right corner and then select **Manage Account**.
2. Click the **Company Account** tab.
3. Scroll to the **Company Contacts** section and click **Add Contact** to add a new user and grant access to the portal.
4. Enter the required information for the user (Required fields are marked with a red asterisk *)
 - The Organization field allows you to select the branch within your Company's organization where this contact should be created. Click **Choose** to select the organization option, then select the organization entry and click **Save**.
 - The Persona field allows you to select an available persona to assign to each Contact. Click **Add Persona**, then select one or more personas for that individual and click **Save**.

Notes: A TPO Manager persona is required to view the Purchase Advice. The TPO Loan Officer persona is view only.

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

- * Email Address (text input)
- * First Name (text input)
- Middle Name (text input)
- * Last Name (text input)
- Login Status: Enabled (dropdown)
- NMLS ID (text input)
- Social Security # (text input with mask ###-##-####)
- * Organization (Choose button)
- Use Company Address
- Address (text input)
- City (text input)
- * State (dropdown)
- Zip (text input with dash separator)
- Business Phone (text input with mask (###) ###-####) and Ext. (text input)
- Business Fax (text input with mask (###) ###-####) and Ext. (text input)
- Cell Phone (text input with mask (###) ###-####)
- * Personas (Add Persona button)
- Assigned AE: admin (text input)
- Record Last Updated: 9/28/16 1:36:53 (text input)

Buttons: Cancel, Save

5. When finished, click the **Save** button. The user will receive an email that provides a link to the website, along with a log in name (their email address) and a temporary password. The user can then log into the portal.