



## 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**.

TPO Connect Personas	
<b>TPO Manager</b> (Admin)	<ul style="list-style-type: none"><li>• Add and edit user profiles</li><li>• View products and pricing, price scenarios, and lock loans</li><li>• Submit loans for purchase and submit conditions</li><li>• Access the Purchase Advice</li></ul>
<b>TPO Loan Officer</b>	<ul style="list-style-type: none"><li>• General access</li><li>• Pipeline visibility (view only)</li></ul>
<b>TPO Loan Officer – Enhanced</b>	<ul style="list-style-type: none"><li>• Access pricing scenarios and lock loans</li><li>• View products and pricing</li><li>• Create new loans</li><li>• Access the Purchase Advice</li></ul>
<b>TPO Loan Processor</b>	<ul style="list-style-type: none"><li>• Pipeline management</li><li>• Submit loans for purchase and submit conditions</li></ul>
<b>** All active TPOC users may access the Deal Desk **</b>	

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

- \*Email Address: [Empty]
- \*First Name: [Empty]
- Middle Name: [Empty]
- \*Last Name: [Empty]
- Login Status: Enabled
- NMLS ID: [Empty]
- Social Security #: ###-##-####
- \*Organization: Choose
- Use Company Address
- Address: [Empty]
- City: [Empty]
- \*State: [Dropdown]
- Zip: [Empty] - [Empty]
- Business Phone: (###) ###-#### Ext. [Empty]
- Business Fax: (###) ###-#### Ext. [Empty]
- Cell Phone: (###) ###-####
- \*Persons: Add Persons
- Assigned AE: admin
- Record Last Updated: 9/28/16 1:36:53

Buttons: Cancel, Save

5. Click the **Save** button after all fields are completed. 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.