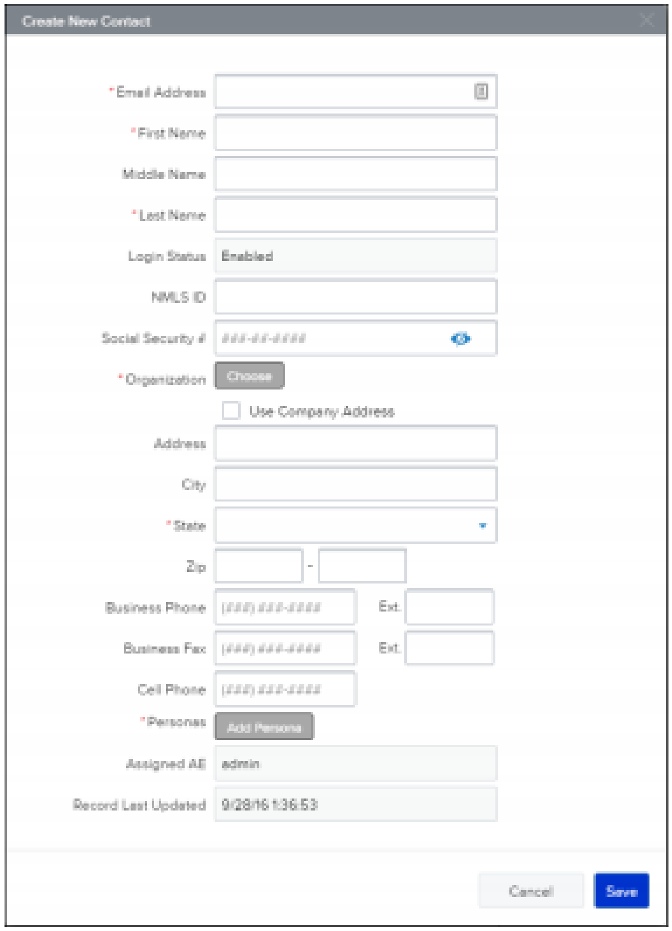
Managing Users in TPO Connect

Create a Contact Record

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

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	
TPO Manager (Admin)	• Add and edit user profiles • Create new loans • View products and pricing, price scenarios, and lock loans • Submit loans for purchase and submit conditions • Access the Purchase Advice
TPO Loan Officer	• General access • Pipeline visibility (view only)
TPO Loan Officer – Enhanced	• Create new loans • View products and pricing, price scenarios, and lock loans • Submit loans for purchase and submit conditions • Access the Purchase Advice
TPO Loan Processor	• Pipeline management • Submit loans for purchase and submit conditions
**** All active TPOC users may access the Deal Desk ****	



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.

Disable a User

To disable access for a user, your Company's Administrator must revise the user contact record. **Note:** Users may not be deleted from the portal.

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 **Edit Contact** to change user access to the portal.
4. Change the *Login Status* field to "Disabled", then click the **Save** button.