Adding a User

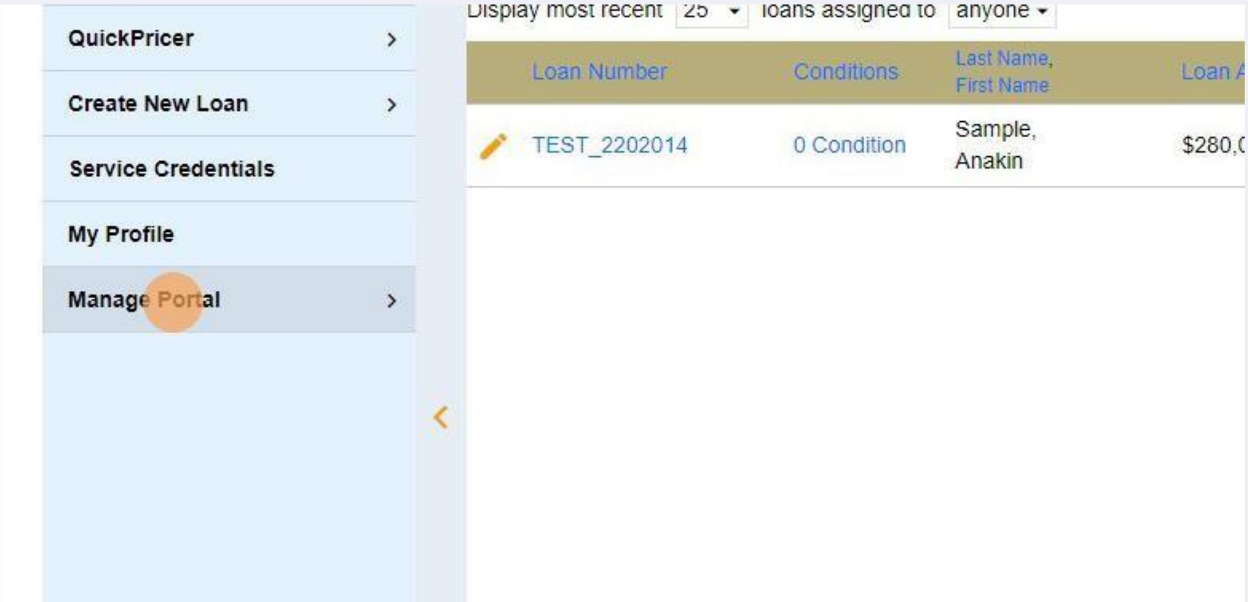
Navigating the “Supervisor Role” with this Broker Portal.

1 **Navigate to https://ameritrusttpo.com/partner-login/**

2 **Enter Your Username and Password and press "LOGIN"**

3

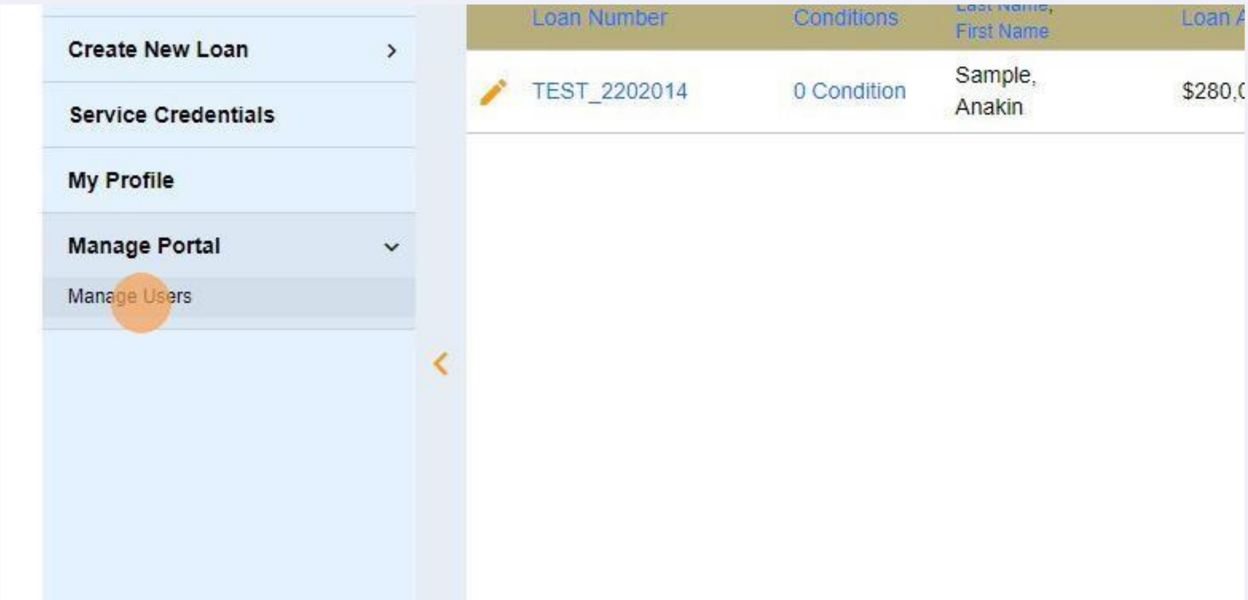
You are now in the Broker Portal. To add or modify login credentials in your company: Click "Manage Portal"



Alert! Before you create a new Profile in your company, you will need to have some info ready: LO/Processor Name, Email, Business Hour Phone Number, Mobile Number, Email, Licensed States, NMLS number, and access level (all loans within the company or just those assigned to this person). Lastly, decide if this person needs the ability to create loans or just view and edit existing loans.

4

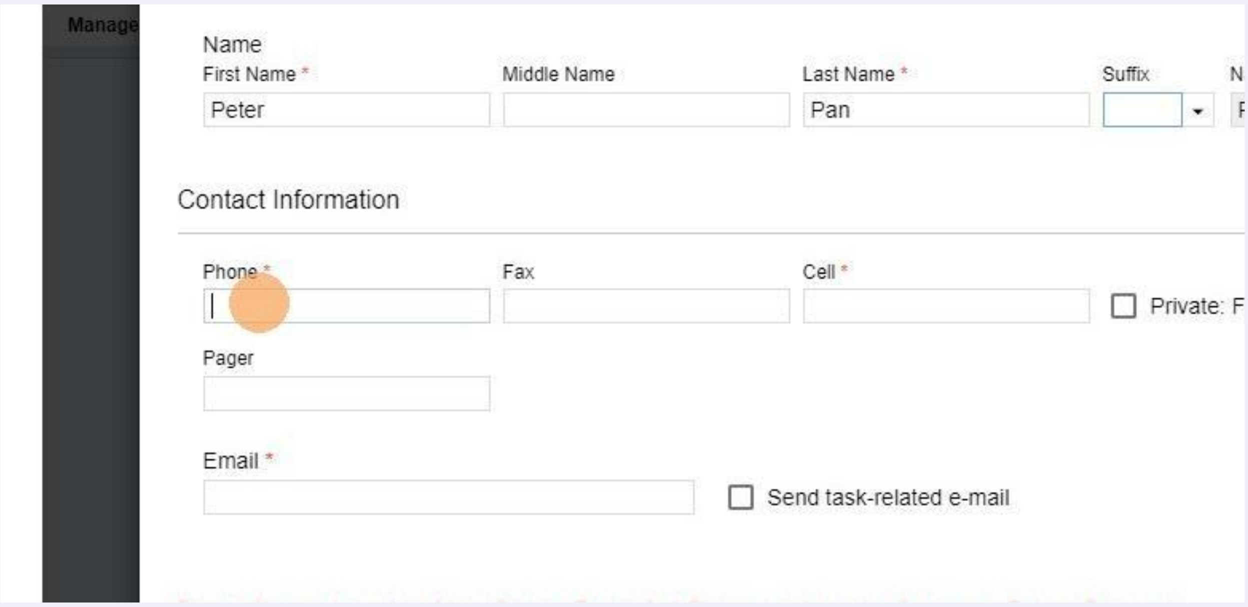
Click "Manage Users"



Tip! Let's now create a completely new user.

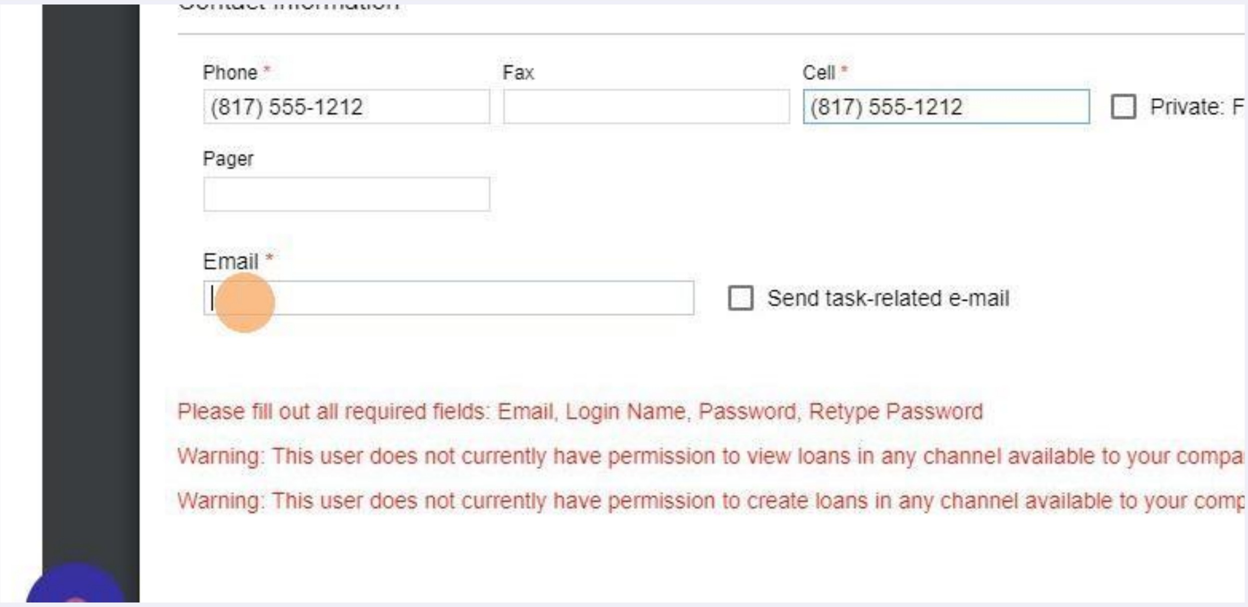
5 Click "ADD NEW USER"

6 Start entering the info into the fields with a red asterisk.

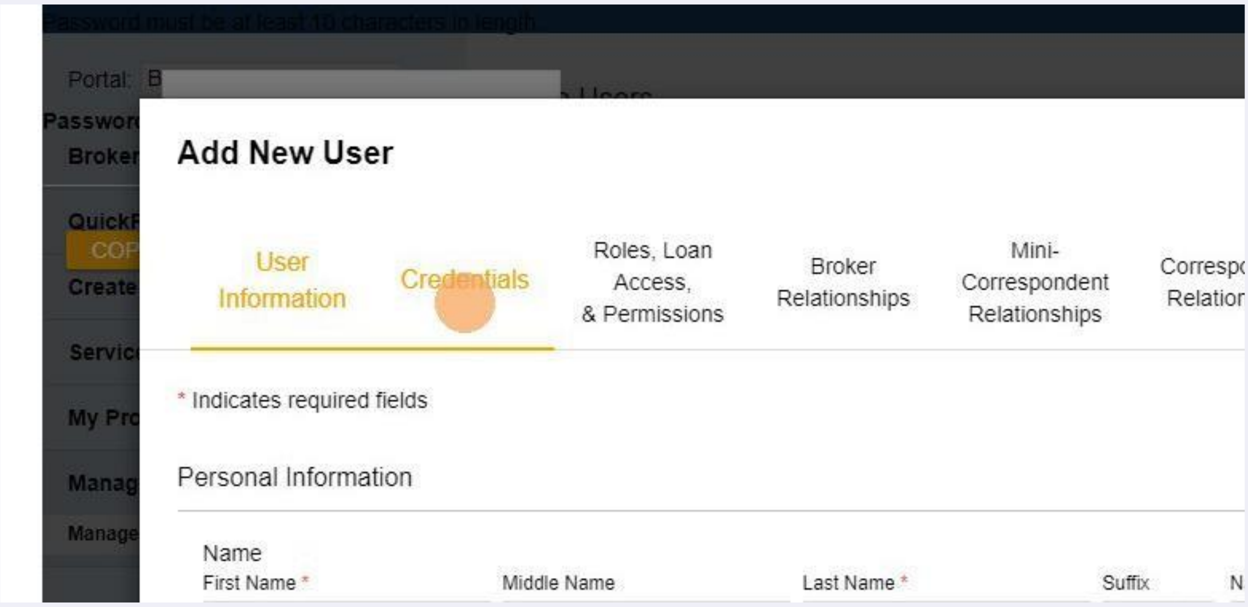


Tip! Enter the First, Middle, & Last name as it appears on the registered on the NMLS. Notice the system notices in red below. They will show you your progress in creating this profile and provide the next steps on the info required.

7 Click this text field.

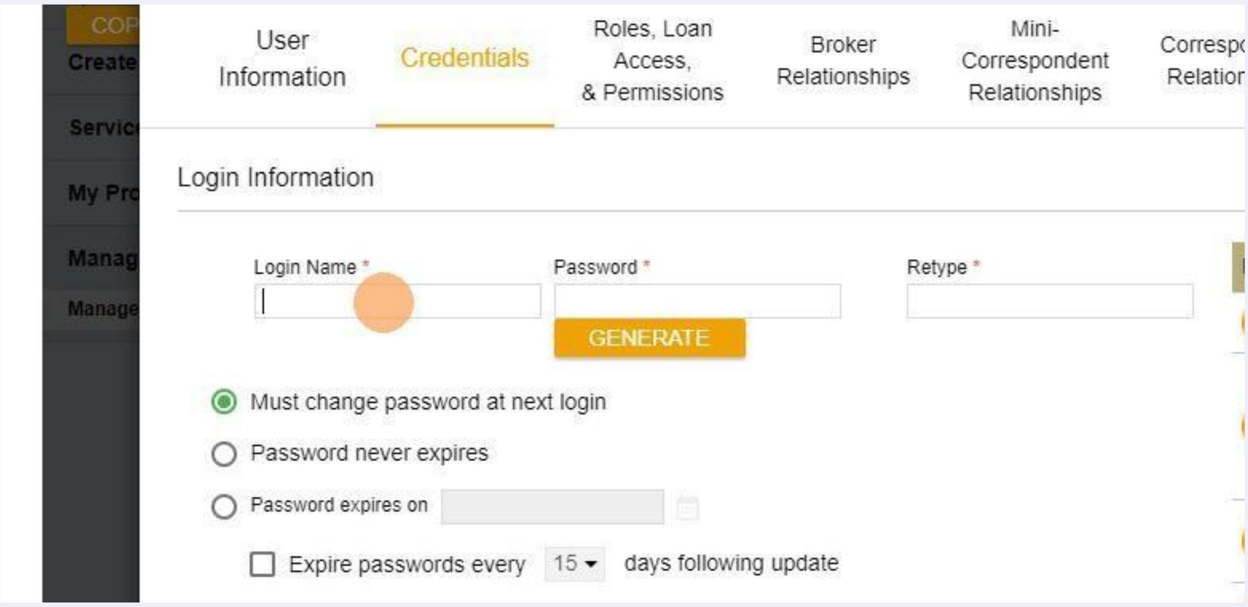


8 Click "Credentials"



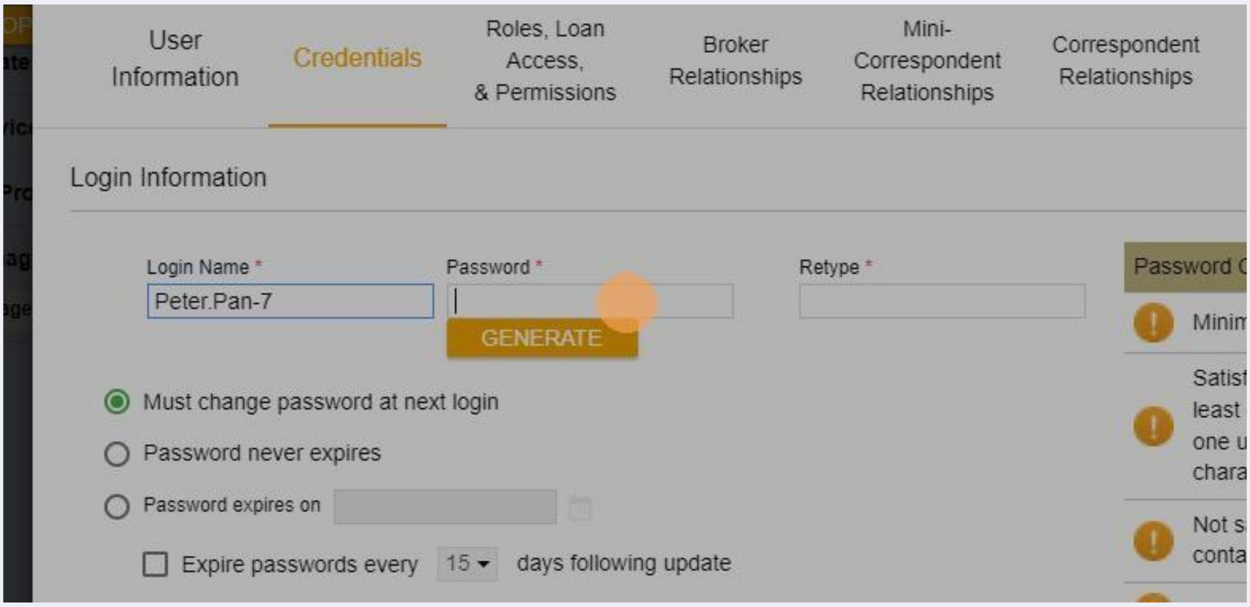
Tip! You will need to create a naming convention for the users in your broker portal. These names need to be unique to every user. You will be prompted if this username already exists. For example, if John.Smith already exists you may need to create John.Smith22. This login name should not be the email address.

9 Click this text field.

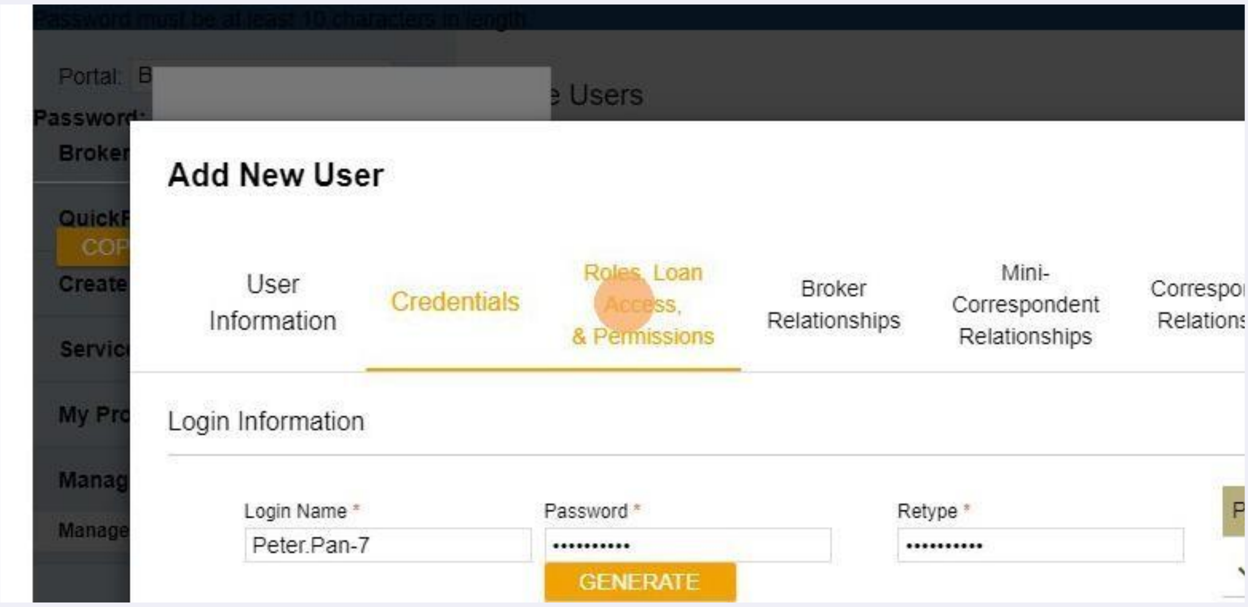


Tip! You will need to create a password. You can use the generate feature to have the system create a random password or you can use one of your choosing. Keep in mind the first act the user will perform is to customize a password of their choosing. Requirements- 10 characters & Satisfies at least 3 of the 4 complexity criteria: At least one digit (0-9), one lowercase letter (a-z), one uppercase letter (A-Z), or one special character.

10 Click this password field and enter it twice to confirm the entries matching.



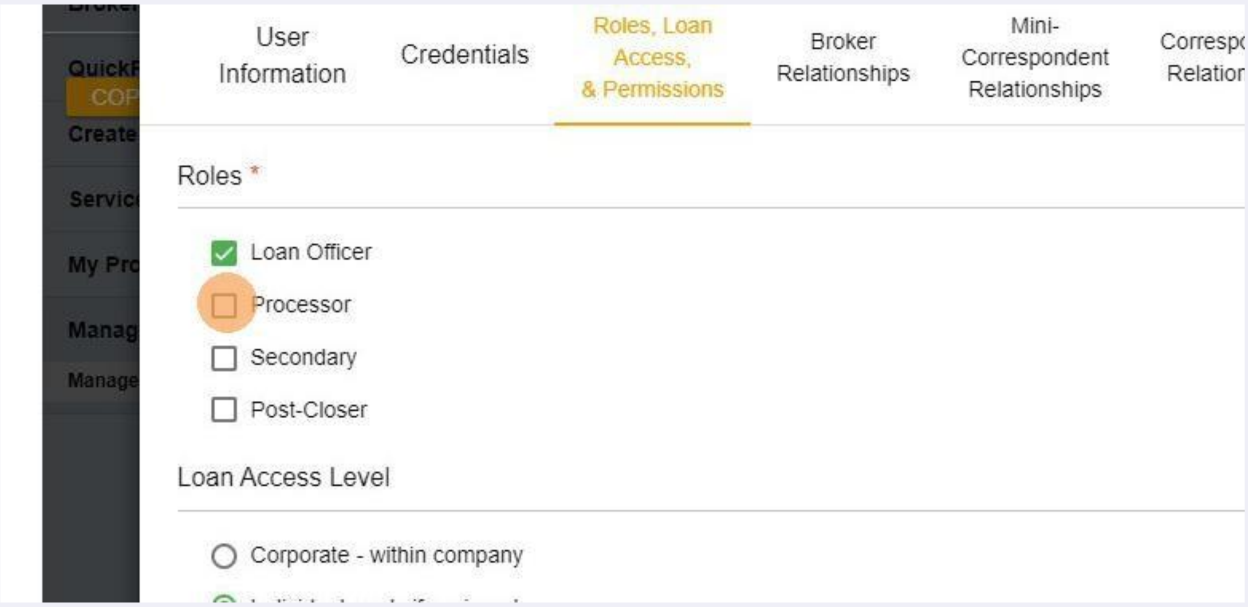
11 **Click "Roles, Loan Access, & Permissions"**



Alert! Loan officers need to have an NMLS license. You will soon enter the NMLS license and every state license. Processors without an NMLS license need to use your company's NMLS number if they are a full-time employee. Contract Processors need to use their NMLS number or the company's NMLS number.

Tip! Do you want your processor to be able to create loans? If yes then make sure you also select Allow "viewing" &"creating" in the checkbox below.

12 **Click the "Processor" AND "Loan Officer" to assign these roles.**

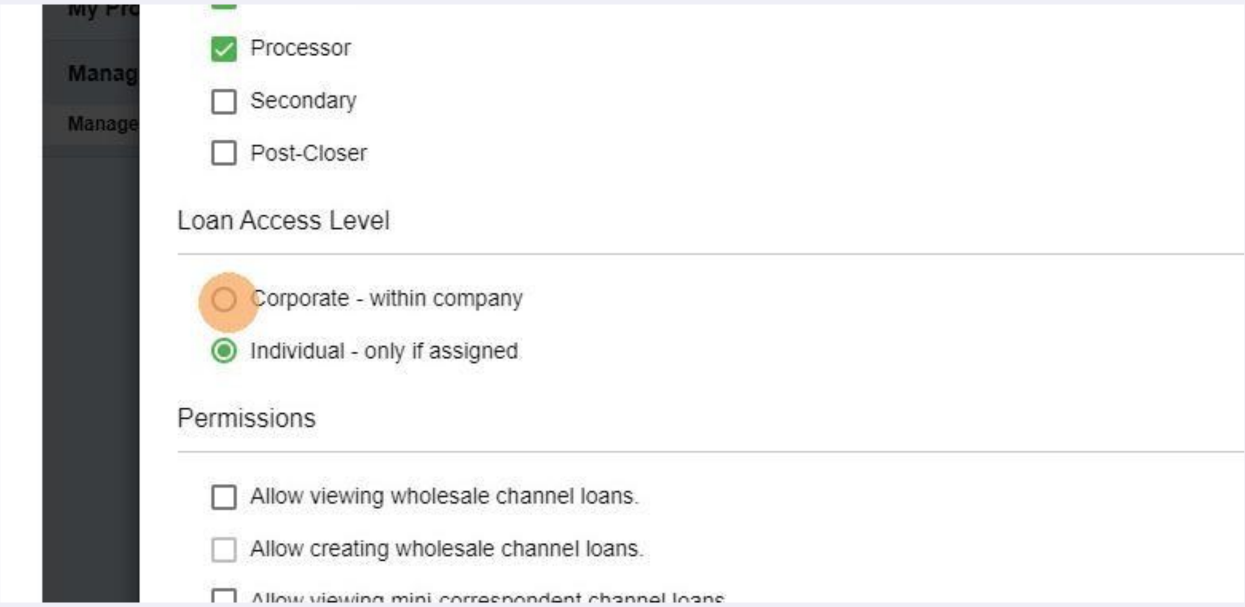


Tip! Loan Access Level "Corporate" will be able to open and edit every loan file in the Broker Portal. Loan Access Level "Individual" will only be able top open and edit loans specifically assigned to them by another File Owner.

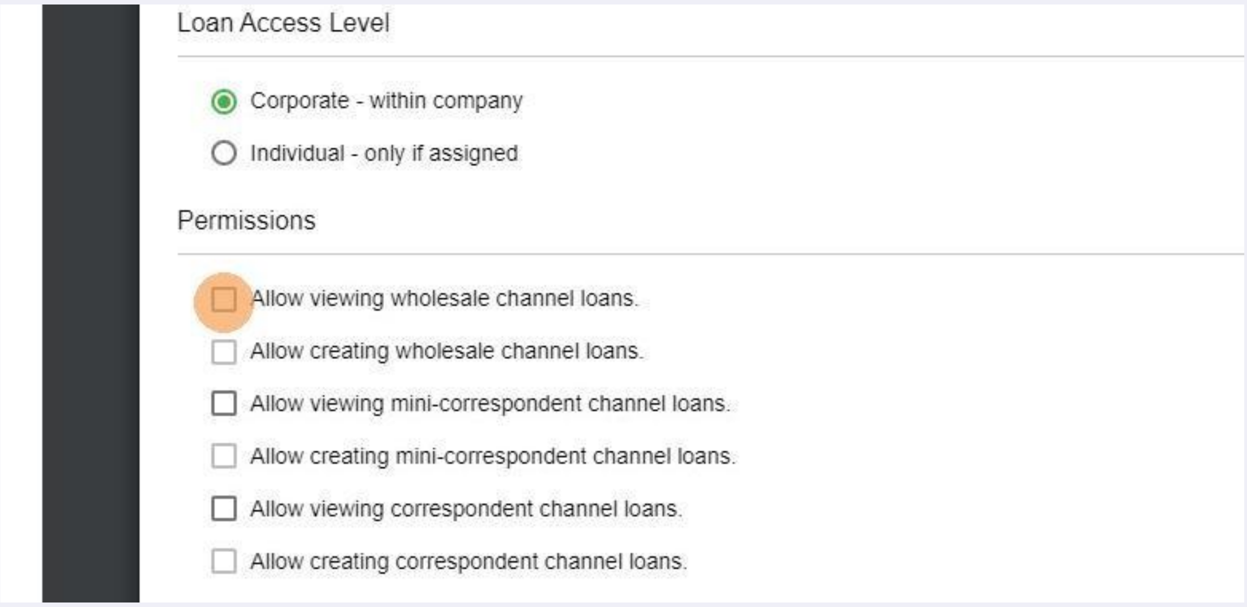
Alert! Do not manipulate the below fields before collaborating with your Account Executive. Most Companies will be set up with a single Broker of Record and have all other users fall under this single user. If your company has multiple brokers or records with different employees assigned, please consult your Account Executive.

Alert! Please consult your Account Executive before modifying the below permission levels: Broker Relationships, Mini-Correspondent Relationships, and Correspondent Relationships.

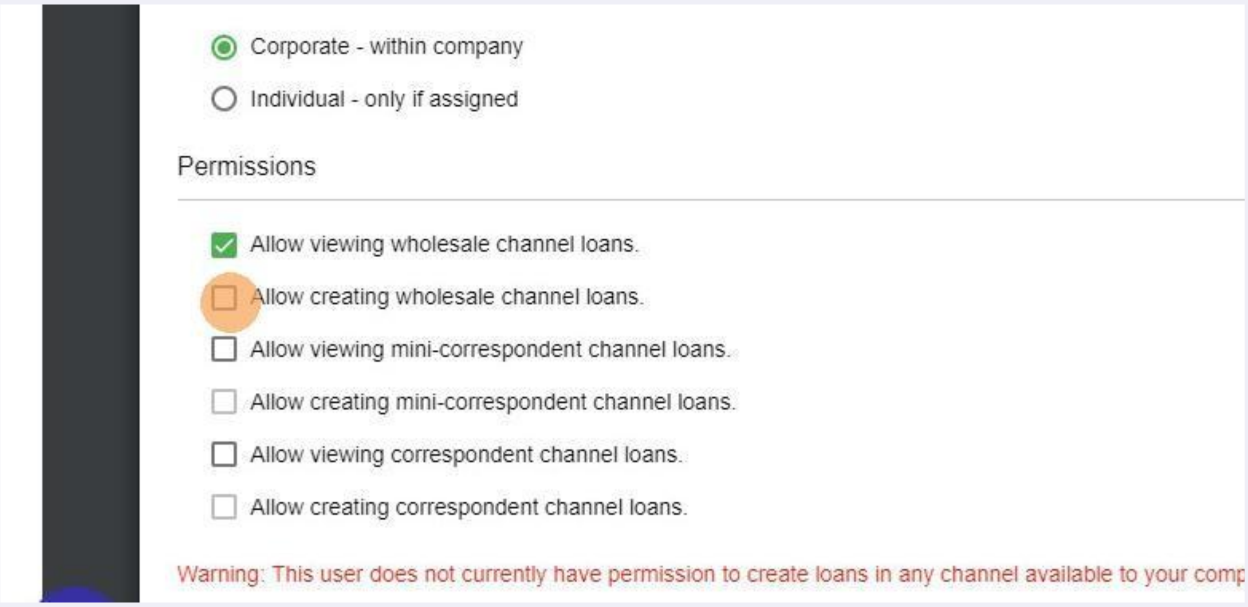
13 **Click the "Corporate - within company" button to give the ability to see all loans or "Individual – only if assigned" to have the user only see their loan.**



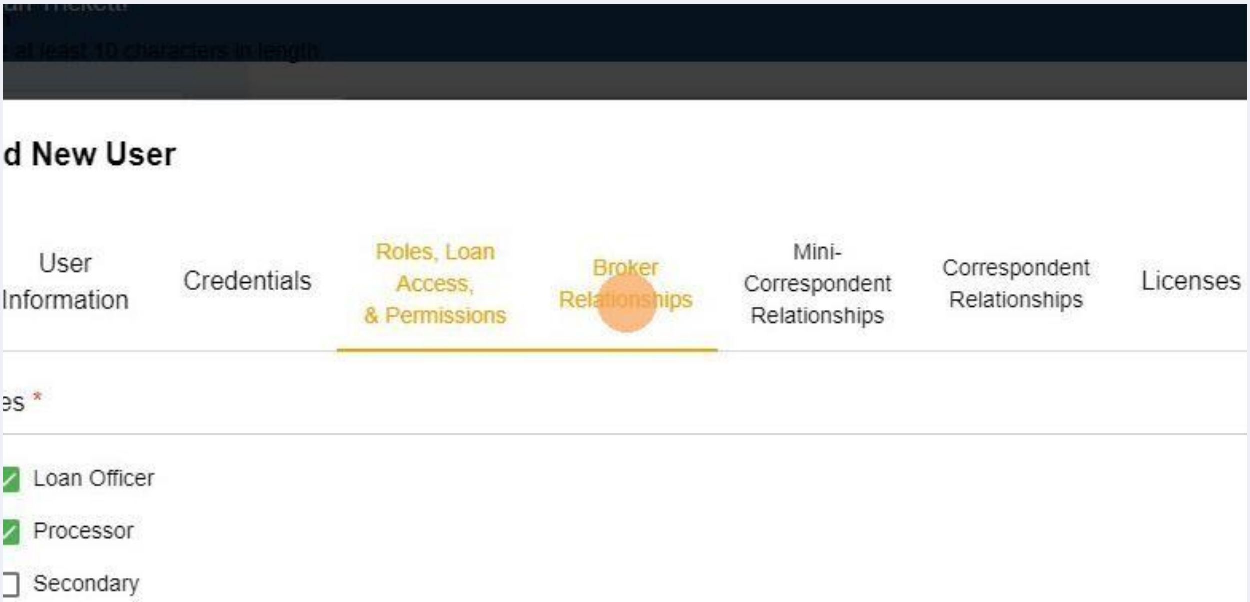
14 **Click the "Allow viewing wholesale channel loans" option or the appropriate partnership level: Wholesale, Non-Delegated, and Delegated Correspont.**



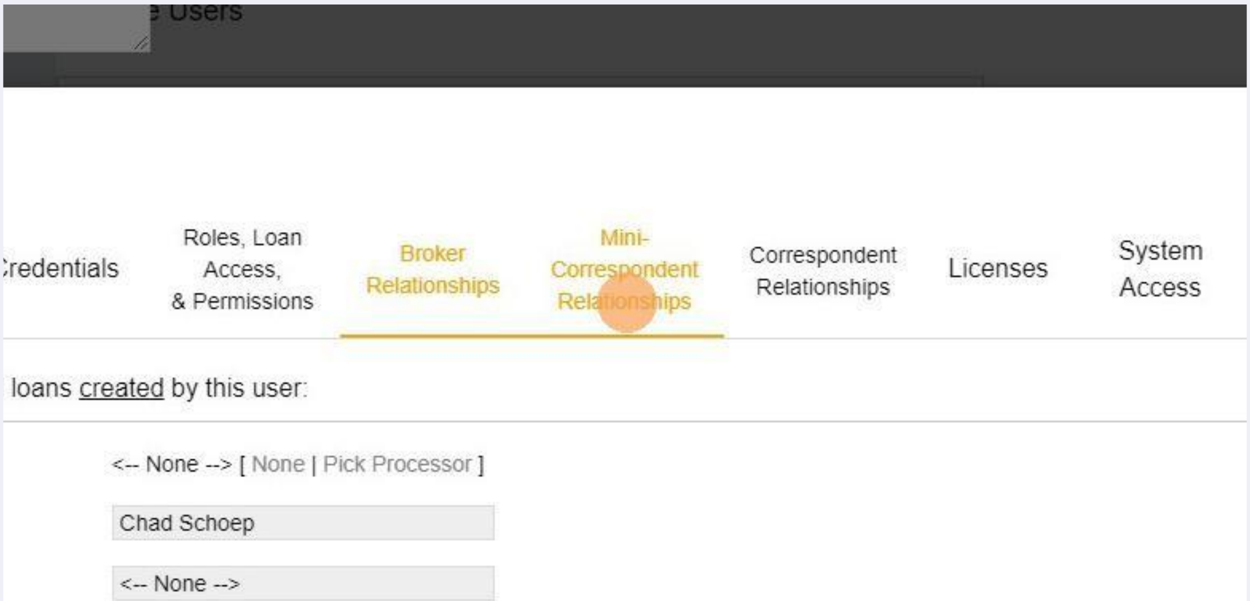
15 **Click the "Allow viewing/creating wholesale channel loans" option. This will enable your user to conduct business as a wholesale LO/Processor.**



16 **Click "Broker Relationships" to assign the role of LO and/or processor. Both will receive all file updates via email.**

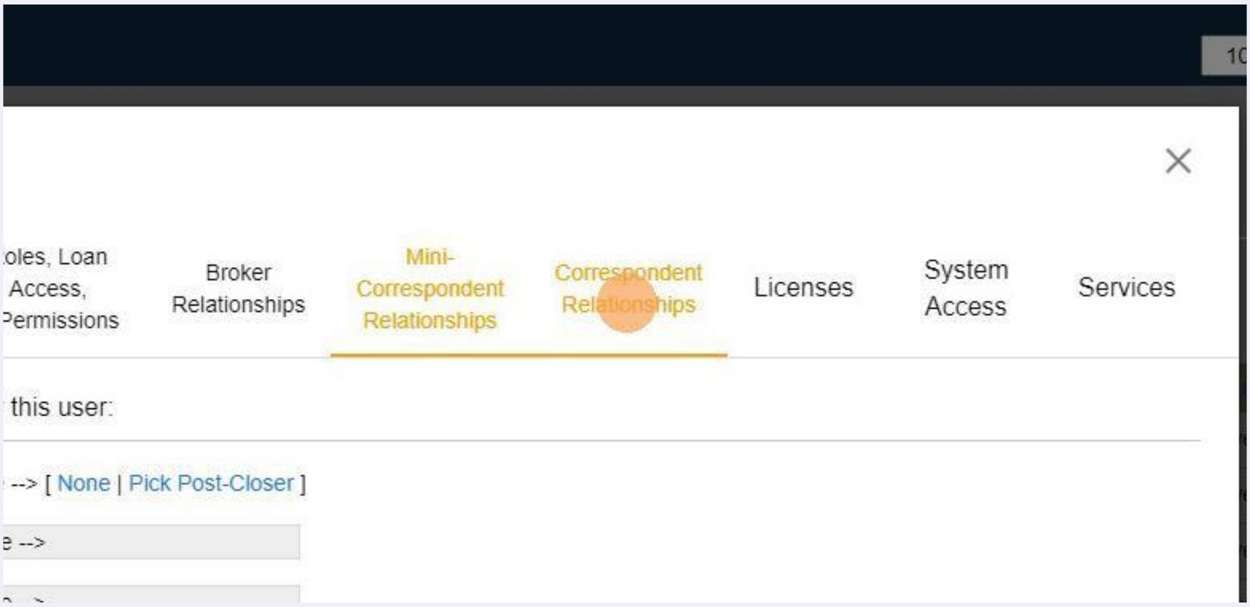


17 Click "Mini-Correspondent Relationships"

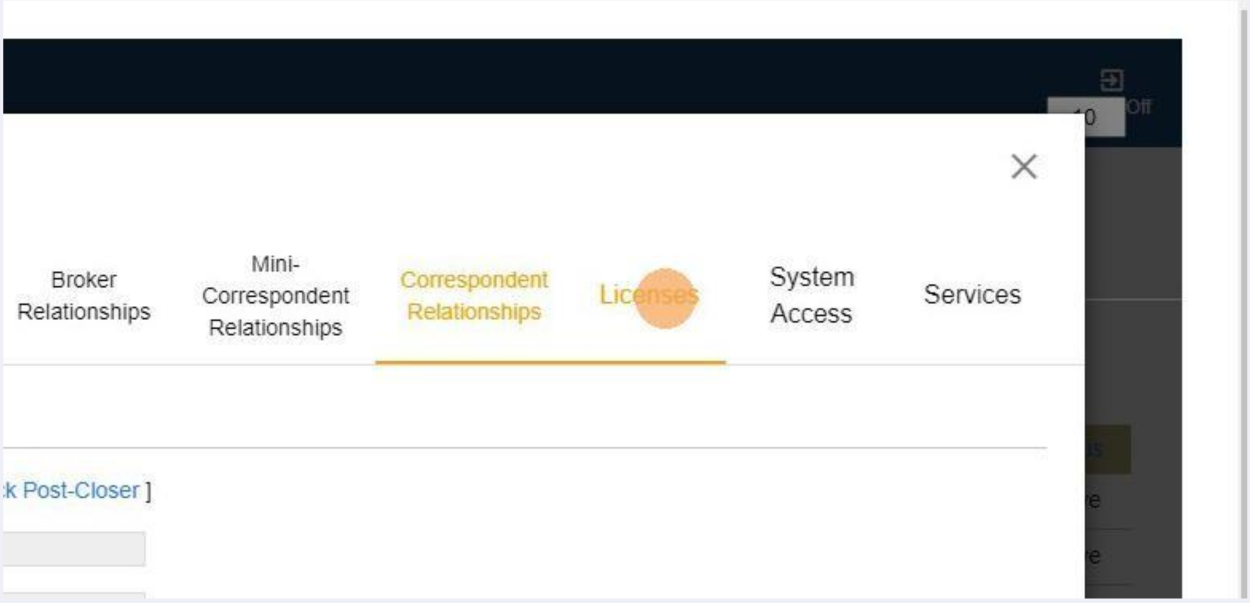


Alert! Alert! See your AE before making these assignments. These access levels will depend on our partnership level.

18 Click "Correspondent Relationships"

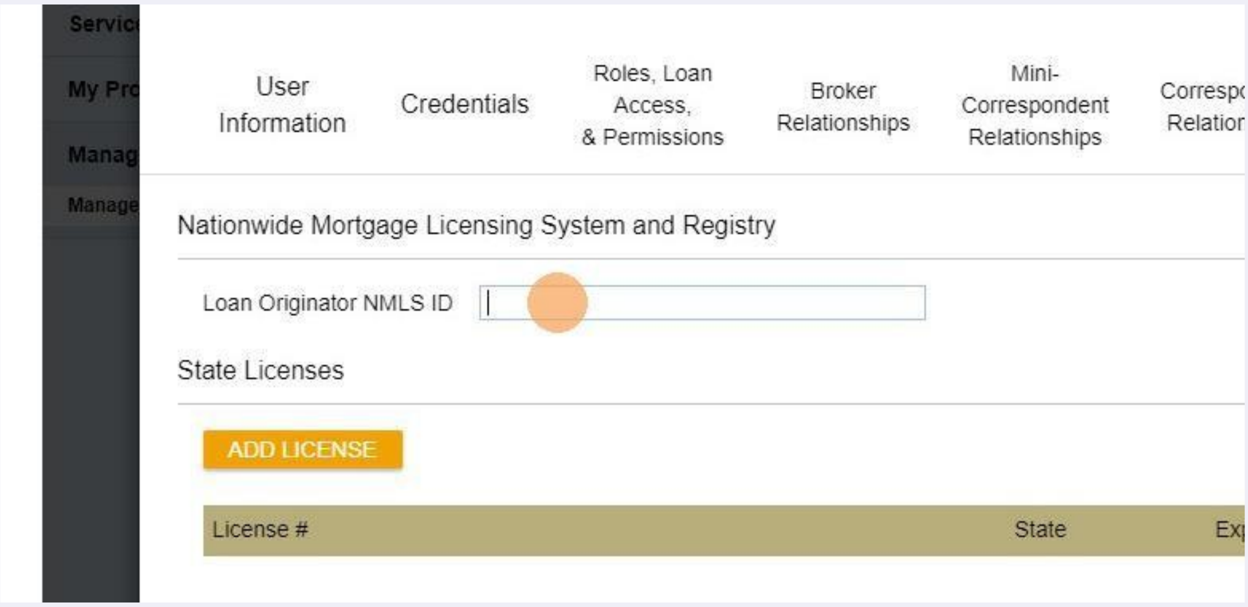


19 Click "Licenses"

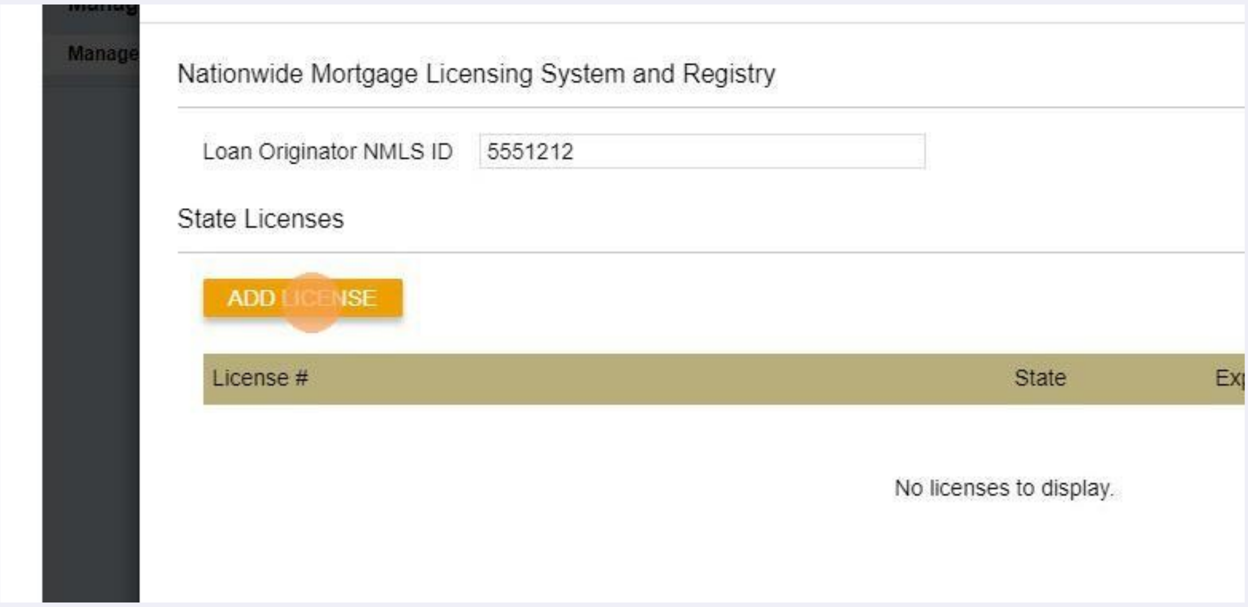


Tip! You will need the NMLS number and every state license number associated for this user. It is common for an NMLS number to represent multiple state licenses.

20 Click this text field.

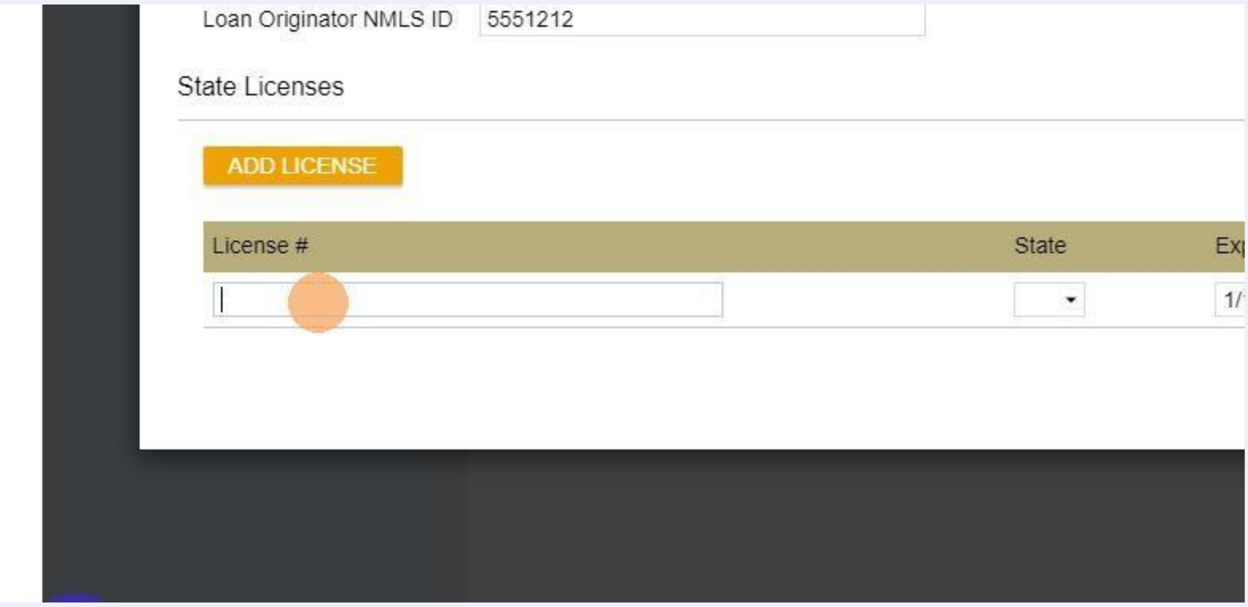


21 Click "ADD LICENSE"

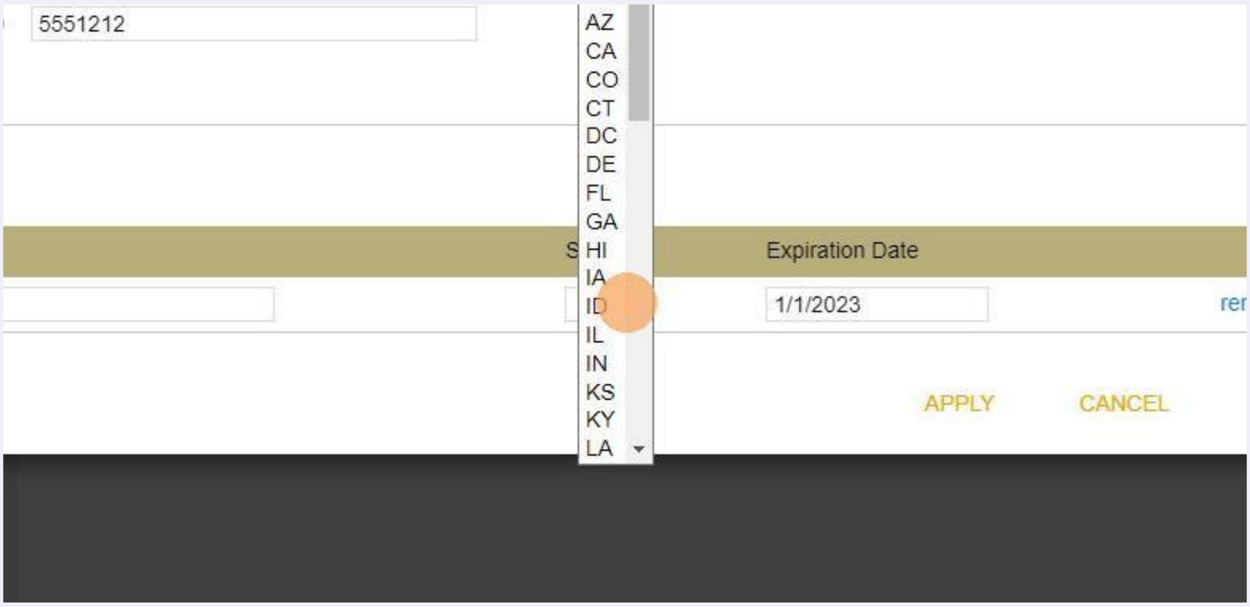


Tip! Keep the default expiration date for state licensing. Since these generally expire at the end of each calendar year, you will need to maintain these profiles on an annual basis with the most up to date licensing information.

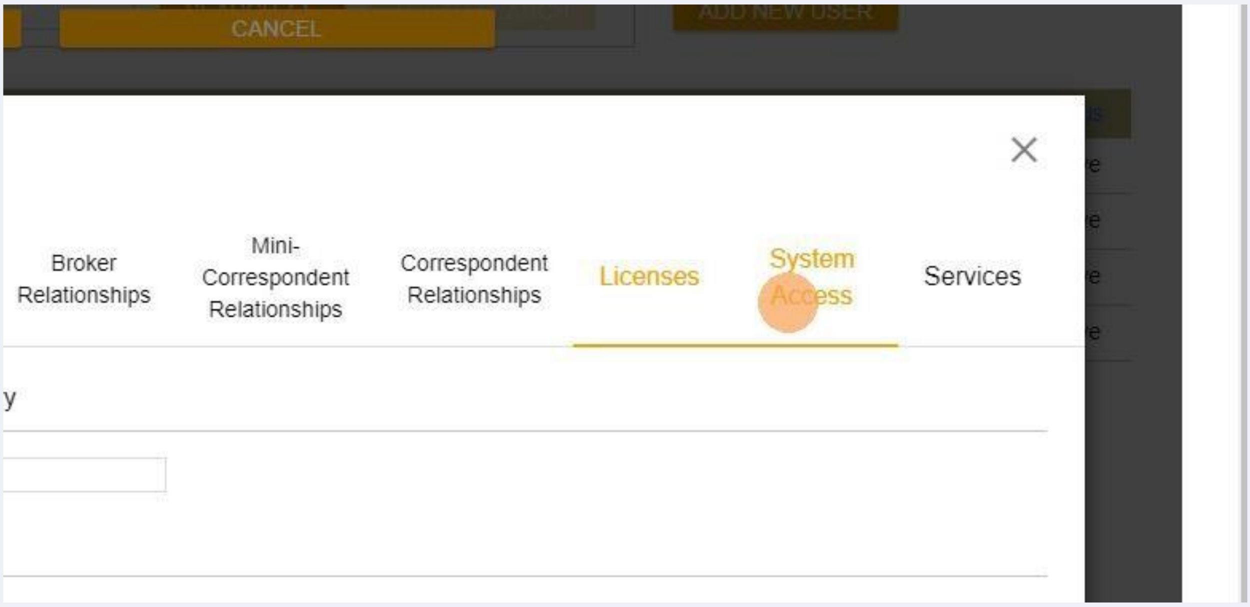
22 Click this text field.



23 Click this dropdown to select the appropriate state license.

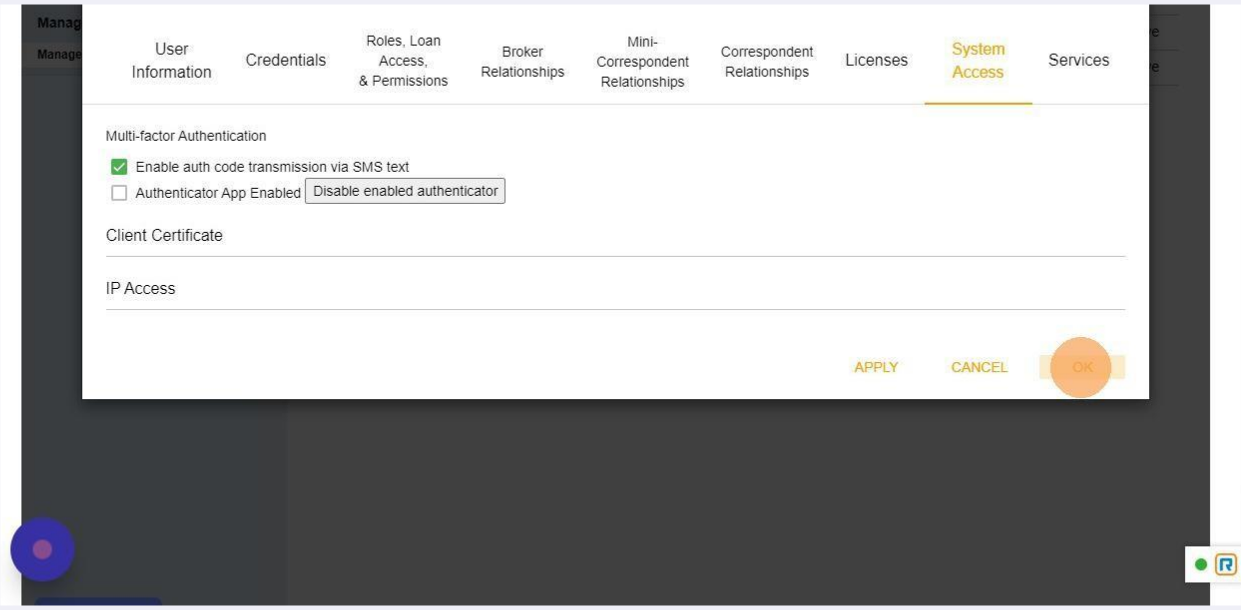


24 **Click "System Access"**



Alert! "Enable auth code transmission via SMS text" should be the only verification process you will use. You must consult your Account Executive before selecting any other "Multifactor Authentication".

25 **Click "OK". You just created a new user.**



Tip! That's it. Next, you can instruct your person to log into our broker portal where they will use this initial password you set. Their very next step in logging in is to create a new password of their own.
https://ameritrusttpo.com/partner-login/

Alert! If a user enters the wrong password too many times, their account may be temporarily frozen. In this case, you will need to press an "UNLOCK" button within the "Credentials" section of the profile. This feature will only show when the actual account is "Locked". It is recommended you also reset the password so the user can create their own familiar password.

Tip! Once you click on the Apply and OK button you have created a new user. Please note these users will forever exist in your system, profile and these entries cannot be deleted, only marked as "Active" or "Inactive".