Instruction – User Account Management

Security Profiles

The Web Portal has 4 security profiles that can be assigned to a user. A user can be assigned more than one security profile.

- Loan Officer: For users who are licensed loan officers. This user must have at least one valid state license.
- Loan Officer Assistant: For users who will be assisting a loan officer.
- Loan Processor: For users who will be processing a loan file.
- Broker / Admin Manager: For users who will be responsible for creating and managing user accounts for their organization.

Creating a New User

If you are not an administrator, please contact your organization's account administrator about creating a new user account.

To create a new user account for your organization, click "Account Manage" at the top right corner. You will be redirected to the account management page, where you can find your organization's information and a list of all user accounts in your organization.

Click the "New User" button to be taken to the account creation page.

Profile

Company Name	Test Broker				
Address	2650 E. Imperial Hwy Suite 110 Brea CA 92821				
Phone	(909) 111-2222		**Fax**	(909) 333-4444	

	Code	Start	End	TPOLoanBPS	TPOFlatFee
Compensation Plan	BComPlan2750	6/25/2024	7/31/2024	2.750	0.00
	BComPlan3125	8/1/2024	7/31/2025	3.125	0.00

New User   **Reload**

ID	Name	Title	Email
demo.account	Demo Account		daniel.park@wmbankers.com
test.account	test account		test@wmbankers.com
test.kim	Test Kim	Owner2	sean.park3@wmbankers.com
test.kim3	Test Kim3		test3@wmbankers.com

Fill out the required fields and click "Save General Info" to create the account.

General Info

Profile *	[dropdown]
NMLS ID	
First Name *		**Last Name** *	
Email *	
Title	
Mobile Phone *		Work Phone	
Start Date	mm / dd / yyyy	Terminate Date	mm / dd / yyyy

Save General Info   * is required field

Back to Account Manage

Managing Existing Users

To manage existing users for your organization, click on the username of the account you are trying to modify. You will see a section for general information about the account, as well as any state licenses and roles associated with it.

Profile

Company Name	Test Broker				
Address	2650 E. Imperial Hwy Suite 110 Brea CA 92821				
Phone	(909) 111-2222		Fax	(909) 333-4444	

	Code	Start	End	TPOLoanBPS	TPOFlatFee
Compensation Plan	BComPlan2750	6/25/2024	7/31/2024	2.750	0.00
	BComPlan3125	8/1/2024	7/31/2025	3.125	0.00

New User   **Reload**

ID	Name	Title	Email
demo.account	Demo Account		daniel.park@wmbankers.com
test.account	test account		test@wmbankers.com
test.kim	Test Kim	Owner2	sean.park3@wmbankers.com
test.kim3	Test Kim3		test3@wmbankers.com

To reset an account's password, click the "Reset Password" button inside the general information section. Confirm again that you want to reset the password. A reset email will be sent to the email address associated with the account.

General Info

User ID	test.account Reset Password	NMLS ID	1231456
First Name *	test	Last Name *	account
Email *	test@wmbankers.com		
Title			
Mobile Phone *	(123) 456-7890	Work Phone	
Start Date	mm/dd/yyyy	Terminate Date	mm/dd/yyyy

Save General Info   * is required field

Back to Account Manage

State License   **New**

State	License No	Started	Expires
CA	1236781549	8/14/2024	10/14/2025

Profile   **New**

User ID	Profile	
test.account	Loan Officer	Delete

To update information in the general section, click on any of the fields shown and input your changes. Click "Save General Info" to apply your changes.

General Info

User ID	test.account **Reset Password**
First Name *	test
Email *	test@wmbankers.com
Title	
Mobile Phone *	(123) 456-7890
Start Date	mm / dd / yyyy

NMLS ID	1231456
Last Name *	account
Work Phone	
Terminate Date	mm / dd / yyyy

Save General Info * is required field

Back to Account Manage

State License [New]

State	License No	Started	Expires
CA	1236781549	8/14/2024	10/14/2025

Profile [New]

User ID	Profile	
test.account	Loan Officer	Delete

To add a new state license, click "New" at the top of the section.

Fill out the fields shown to you and click "Save" to apply your changes.

To modify an existing license, click on the license and make your desired changes.

General Info

User ID	test.account Reset Password	NMLS ID	1231456
First Name *	test	Last Name *	account
Email *	test@wmbankers.com		
Title			
Mobile Phone *	(123) 456-7890	Work Phone	
Start Date	mm/dd/yyyy	Terminate Date	mm/dd/yyyy

Save General Info   * is required field

Back to Account Manage

State License   New

State	License No	Started	Expires
CA	1236781549	8/14/2024	10/14/2025

Profile   New

User ID	Profile	
test.account	Loan Officer	Delete

Confirm and apply your changes by clicking "Save".

State License

State:	
License No	
Start Date	mm/dd/yyyy
Expiration Date	mm/dd/yyyy

Save **Close**

To add a new role, click "New" at the top of the section.

Select the role you want to add and click "Save" to confirm the addition of the new role.

Existing roles can be removed from the account by clicking the "Delete" button next to the role.