

Adding a User

Navigating the "Supervisor Role" with this Broker Portal.

1 Navigate to <https://ameritrustpo.com/partner-login/>

2 Enter Your Username and Password and press "LOGIN"



Login

Password

[Forgot login?](#)

[Forgot password?](#)

LOGIN

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3

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

The screenshot shows a web application interface. On the left is a vertical sidebar with several menu items: 'QuickPricer', 'Create New Loan', 'Service Credentials', 'My Profile', and 'Manage Portal'. The 'Manage Portal' item is highlighted with a grey background and a blue circle around it. To the right of the sidebar is a main content area. At the top of this area, there are two dropdown menus: 'Display most recent' set to '25' and 'loans assigned to' set to 'anyone'. Below these is a table with the following data:

Loan Number	Conditions	Last Name, First Name	Loan A
TEST_2202014	0 Condition	Sample, Anakin	\$280,0



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"

The screenshot shows the same web application interface as above, but the 'Manage Portal' item in the sidebar is now expanded, and the 'Manage Users' sub-item is highlighted with a grey background and a blue circle around it. The main content area remains the same, showing the table with one loan entry.



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

5 Click "ADD NEW USER"

Log On

SEARCH CLEAR SEARCH ADD NEW USER

Roles	Can Create New Loans?	Status
Loan Officer, Processor	Yes - Wholesale	Active
Loan Officer, Processor, Secondary	Yes - Correspondent	Active

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

Manage

Name

First Name * Middle Name Last Name * Suffix N

Peter Pan F

Contact Information

Phone * Fax Cell * Private: F

Pager

Email * Send task-related e-mail



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.

Contact Information

Phone *	Fax	Cell *	<input type="checkbox"/> Private: F
<input type="text" value="(817) 555-1212"/>	<input type="text"/>	<input type="text" value="(817) 555-1212"/>	

Pager

Email *

Send task-related e-mail

Please fill out all required fields: Email, Login Name, Password, Retype Password

Warning: This user does not currently have permission to view loans in any channel available to your compa

Warning: This user does not currently have permission to create loans in any channel available to your comp

8 Click "Credentials"

Portal: B
Password must be at least 10 characters in length
Password
Broker
Quickf
COF
Create
Service
My Pro
Manag
Manage

Add New User

- User Information
- Credentials**
- Roles, Loan Access, & Permissions
- Broker Relationships
- Mini-Correspondent Relationships
- Correspx Relatio

* Indicates required fields

Personal Information

Name				
First Name *	Middle Name	Last Name *	Suffix	N



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.

COF
Create
Service
My Pro
Manag
Manage

- User Information
- Credentials**
- Roles, Loan Access, & Permissions
- Broker Relationships
- Mini-Correspondent Relationships
- Correspx Relatio

Login Information

Login Name *	Password *	Retype *
<input type="text"/>	<input type="text"/>	<input type="text"/>

GENERATE

Must change password at next login

Password never expires

Password expires on

Expire passwords every days following update



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.

User Information **Credentials** Roles, Loan Access, & Permissions Broker Relationships Mini-Correspondent Relationships Correspondent Relationships

Login Information

Login Name * Password * Retype * Password Complexity

Peter.Pan-7 | GENERATE

Must change password at next login
 Password never expires
 Password expires on [] []
 Expire passwords every 15 days following update

Minimum 10 characters
Satisfies at least 3 of the 4 complexity criteria
Not satisfied

11

Click "Roles, Loan Access, & Permissions"

The screenshot shows a web application interface for adding a new user. At the top, there is a dark header with the text "Portal: B" and "Users". Below the header, a white modal window titled "Add New User" is displayed. The modal has a horizontal navigation bar with several tabs: "User Information", "Credentials", "Roles, Loan Access, & Permissions", "Broker Relationships", "Mini-Correspondent Relationships", and "Correspondent Relationships". The "Roles, Loan Access, & Permissions" tab is highlighted with a yellow circle and a yellow underline. Below the navigation bar, the "Login Information" section is visible. It contains three input fields: "Login Name *" with the value "Peter.Pan-7", "Password *" with masked characters "*****", and "Retype *" with masked characters "*****". A yellow "GENERATE" button is located below the password fields. A dark sidebar on the left side of the screen contains various menu items, including "QuickP", "COF", "Create", "Service", "My Pro", "Manag", and "Manage".



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.

The screenshot shows a web interface with a sidebar on the left and a main content area. The sidebar includes options like 'Quickf', 'COF', 'Create', 'Service', 'My Pro', 'Manag', and 'Manage'. The main content area has tabs: 'User Information', 'Credentials', 'Roles, Loan Access, & Permissions' (highlighted in yellow), 'Broker Relationships', 'Mini-Correspondent Relationships', and 'Correspx Relator'. Under the 'Roles' section, there are four checkboxes: 'Loan Officer' (checked with a green checkmark), 'Processor' (highlighted with an orange circle), 'Secondary', and 'Post-Closer'. Below this is the 'Loan Access Level' section with a radio button for 'Corporate - within company'.



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 to 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.

The screenshot shows a user management interface. On the left, a dark sidebar contains the text "my Pro", "Manag", and "Manage". The main content area is white and contains the following elements:

- A green checkmark icon next to the text "Processor".
- An unchecked checkbox next to the text "Secondary".
- An unchecked checkbox next to the text "Post-Closer".
- A section header "Loan Access Level" followed by a horizontal line.
- Two radio button options: "Corporate - within company" (which is selected with an orange circle) and "Individual - only if assigned" (which is unselected with a green circle).
- A section header "Permissions" followed by a horizontal line.
- Three unchecked checkboxes with the following labels: "Allow viewing wholesale channel loans.", "Allow creating wholesale channel loans.", and "Allow viewing mini-correspondent channel loans."

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

The screenshot shows a user management interface. On the left, a dark sidebar contains the text "my Pro", "Manag", and "Manage". The main content area is white and contains the following elements:

- A section header "Loan Access Level" followed by a horizontal line.
- Two radio button options: "Corporate - within company" (which is selected with a green circle) and "Individual - only if assigned" (which is unselected with a white circle).
- A section header "Permissions" followed by a horizontal line.
- Six unchecked checkboxes with the following labels: "Allow viewing wholesale channel loans.", "Allow creating wholesale channel loans.", "Allow viewing mini-correspondent channel loans.", "Allow creating mini-correspondent channel loans.", "Allow viewing correspondent channel loans.", and "Allow creating correspondent channel loans."

15

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

Corporate - within company
 Individual - only if assigned

Permissions

Allow viewing wholesale channel loans.
 Allow creating wholesale channel loans.
 Allow viewing mini-correspondent channel loans.
 Allow creating mini-correspondent channel loans.
 Allow viewing correspondent channel loans.
 Allow creating correspondent channel loans.

Warning: This user does not currently have permission to create loans in any channel available to your comp

16

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

at least 10 characters in length

Add New User

User Information Credentials Roles, Loan Access, & Permissions **Broker Relationships** Mini-Correspondent Relationships Correspondent Relationships Licenses

es *

Loan Officer
 Processor
 Secondary

17

Click "Mini-Correspondent Relationships"

The screenshot shows a user management interface. At the top, there is a dark header with the text "Users". Below the header is a navigation menu with several items: "Credentials", "Roles, Loan Access, & Permissions", "Broker Relationships", "Mini-Correspondent Relationships", "Correspondent Relationships", "Licenses", and "System Access". The "Mini-Correspondent Relationships" item is highlighted with a yellow underline and a yellow circle. Below the navigation menu, there is a section titled "loans created by this user:". Underneath this section, there are two dropdown menus. The first dropdown menu is currently set to "<-- None --> [None | Pick Processor]". The second dropdown menu is currently set to "Chad Schoep". Below the second dropdown menu, there is another dropdown menu set to "<-- None -->".



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

18

Click "Correspondent Relationships"

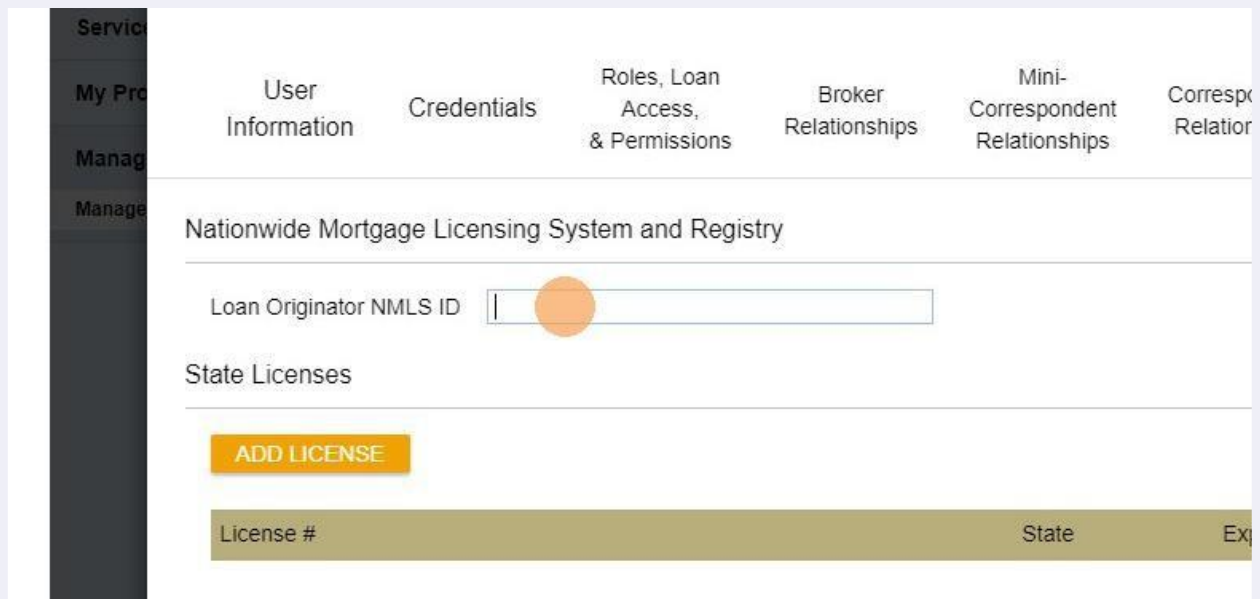
The screenshot shows a user management interface. At the top, there is a dark header with the text "Users" and a close button (X) in the top right corner. Below the header is a navigation menu with several items: "Roles, Loan Access, & Permissions", "Broker Relationships", "Mini-Correspondent Relationships", "Correspondent Relationships", "Licenses", "System Access", and "Services". The "Correspondent Relationships" item is highlighted with a yellow underline and a yellow circle. Below the navigation menu, there is a section titled "this user:". Underneath this section, there are two dropdown menus. The first dropdown menu is currently set to "<--> [None | Pick Post-Closer]". The second dropdown menu is currently set to "e -->". Below the second dropdown menu, there is another dropdown menu set to "<-->".

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"

Nationwide Mortgage Licensing System and Registry

Loan Originator NMLS ID

State Licenses

ADD LICENSE

License #	State	Exp
-----------	-------	-----

No licenses to display.



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.

Loan Originator NMLS ID 5551212

State Licenses

ADD LICENSE

License #	State	Exp
<input type="text"/>	<input type="text"/>	1/

23 Click this dropdown to select the appropriate state license.

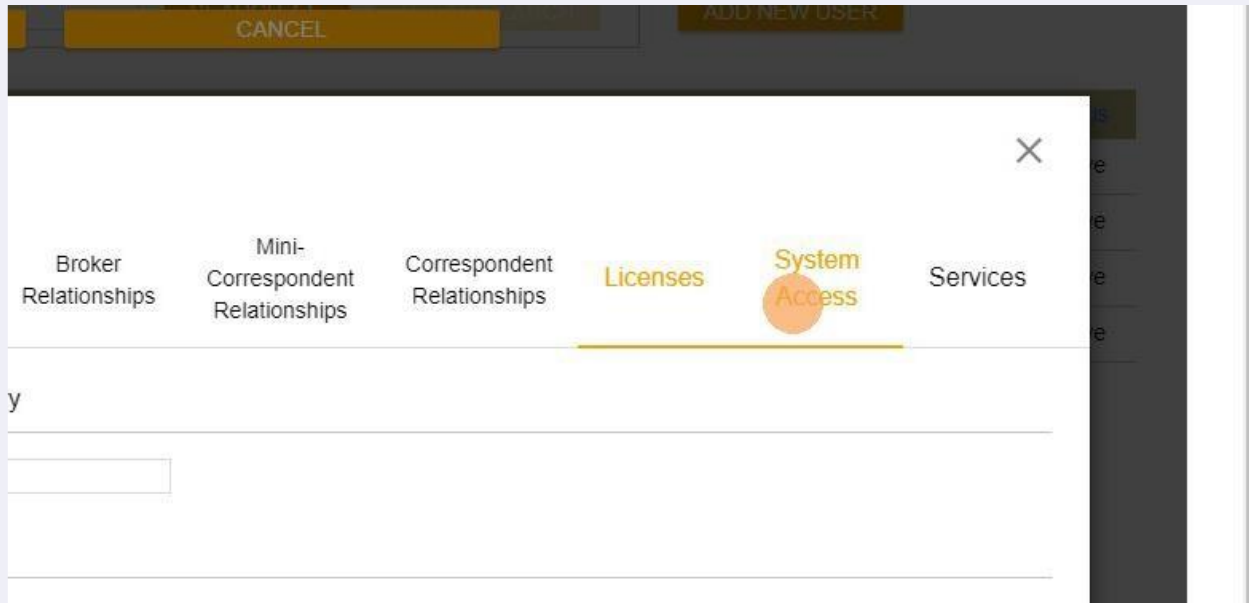
5551212

License #	State	Expiration Date
<input type="text"/>	<input type="text"/>	1/1/2023

APPLY **CANCEL**

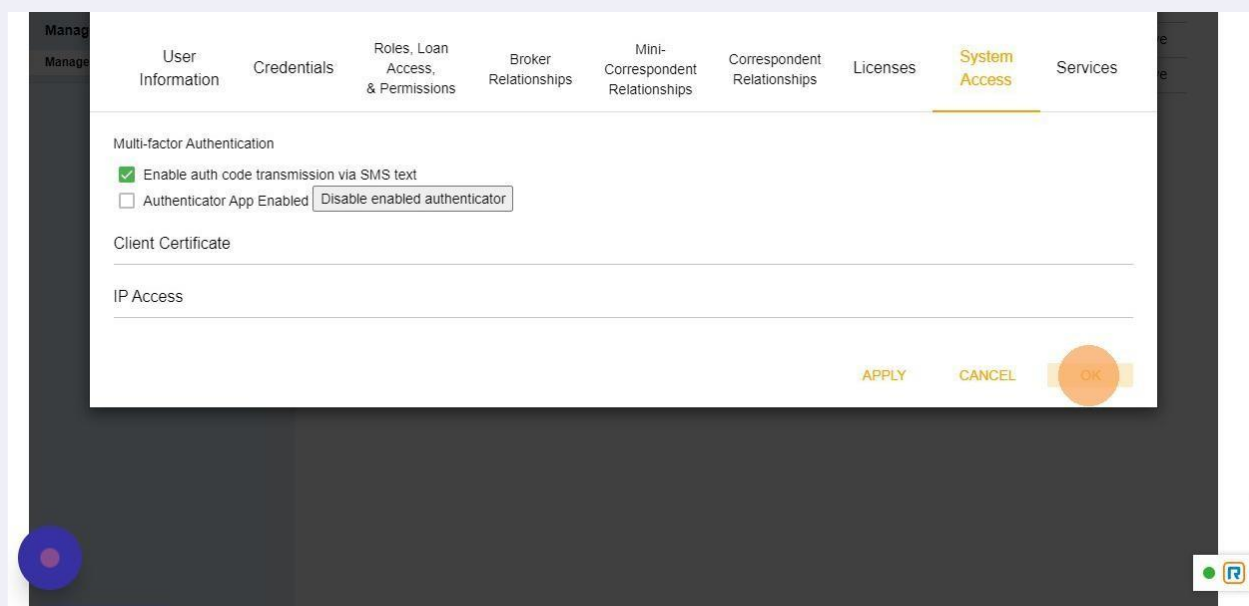
AZ
CA
CO
CT
DC
DE
FL
GA
HI
IA
ID
IL
IN
KS
KY
LA

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".