TPO Broker Manager Guide

Rev. 11/1/2018

Add Users to the Website:

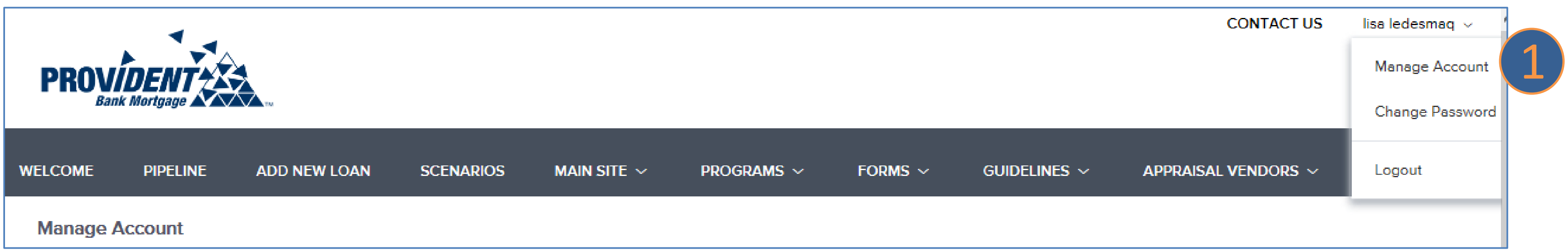
Broker TPO Manager is responsible for validating Loan Officer Name, NMLS ID Number and loan officers' authorization to conduct business for broker office as listed on the NMLS website. http://www.nmlsconsumeraccess.org

Once logged in, the manager can grant users access to the site and update their account information.

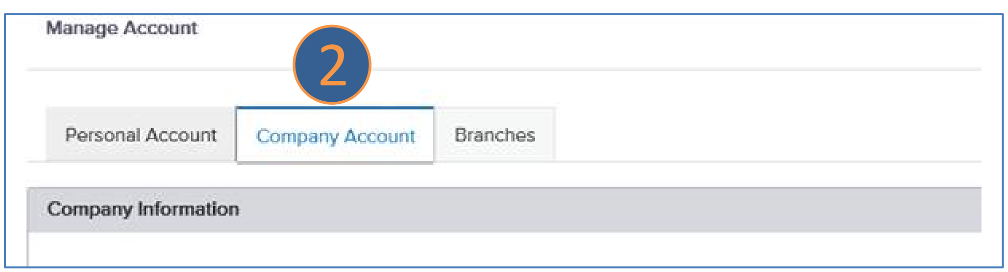
In order for other users to gain access to the website, the manager must create a contact record for each user.

To Create a Contact Record:

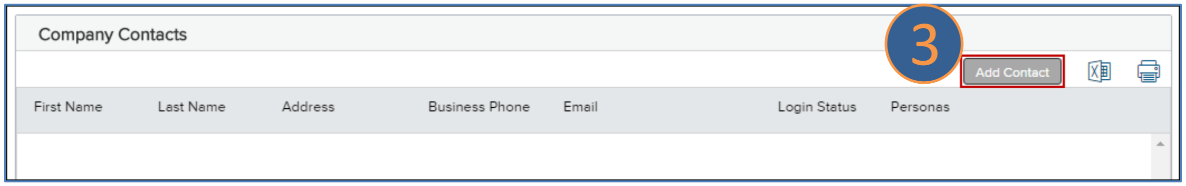
1. Click your user name in the top right corner, and then select **Manage Account**.



2. Click the **Company Account** tab.

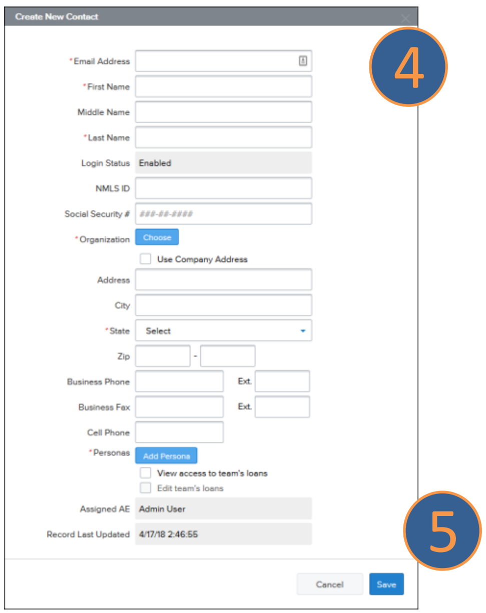


3. Scroll to the Company Contacts section, and then click **Add Contact** to add a new user who will be able to use the website.



4. Enter the required information for the user. (Required fields are marked with a red asterisk *)

- The Organization field enables you to select the branch within the TPO Company's organization where this contact should be created. Click **Choose** to select the organization option, and then select the organization entry and click **Save**.
- The Persona field enables you to select an available persona to assign to the TPO Contact. Click **Add Persona** to select the persona for the TPO contact, and then select one or more personas and click **Save**.



5. When finished, click the **Save** button.

- 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 Broker Company and/or Broker/Principal is fully responsible for the actions and assignments by Manager in the PBM TPO WebCenter.**