

Delegated Administrators are assigned by FLCB at the time of approval.

Only Delegated Administrators can add Users

To Add Users:

Select **Manage User Accounts** from the User menu in the upper right corner of the navigation.

Select the type of user you would like to add.

Originators – allows the originator to access his/her pipeline only.

Processor – allows a processor access only the pipeline for which he/she is processing.

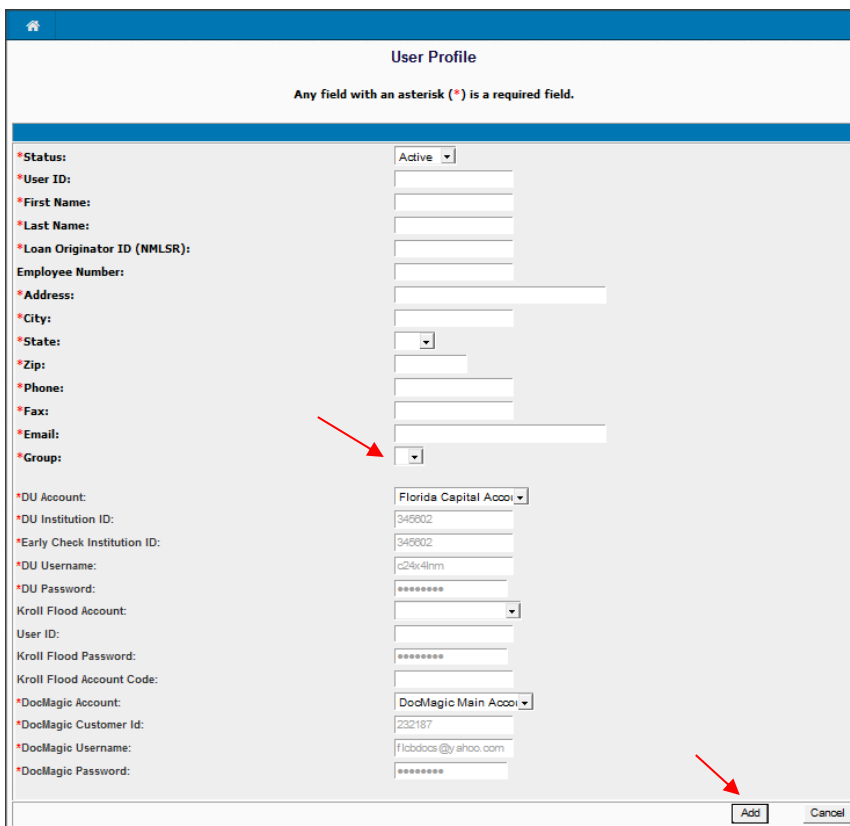
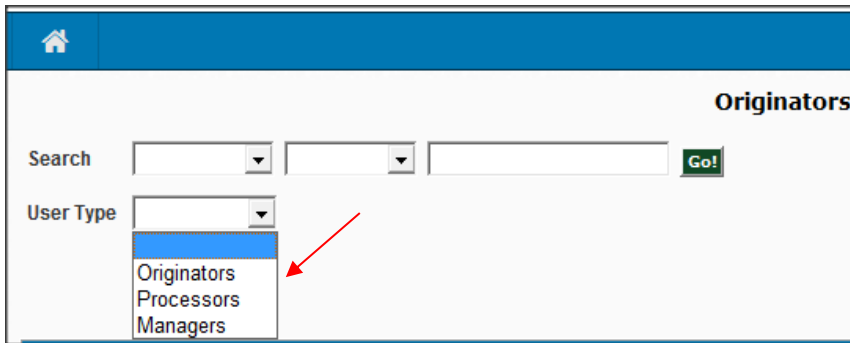
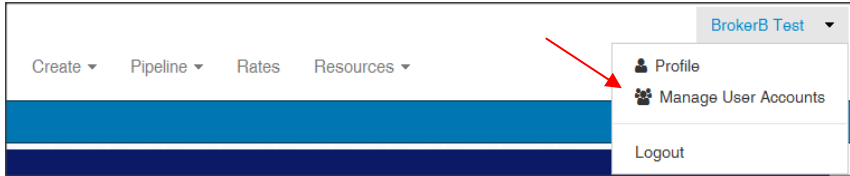
Managers – allows access to pipeline for the entire institution.

Click **Add New**.

NOTE: Add ALL Originators first and then add processors as this will allow you to link the processor to Originator during the setup process.

Complete all required fields marked by a red asterisk and click **Add**.

Note: You will need to select a **GROUP** from the dropdown list. Only selections available to your institution will be displayed.



*Status: Active

*User ID:

*First Name:

*Last Name:

*Loan Originator ID (NMLSR):

Employee Number:

*Address:

*City:

*State:

*Zip:

*Phone:

*Fax:

*Email:

*Group:

*DU Account: Florida Capital Account

*DU Institution ID: 345602

*Early Check Institution ID: 345602

*DU Username: c24x4nm

*DU Password: *****

*LP Account: Florida Capital LP S2S Account

*LP Institution Number: 184337

*LP User ID: fcbn58_lps2s

*LP Authentication Password: *****

*LP Password: *****

Kroll Factual Data Flood Account:

User ID:

Kroll Factual Data Flood Password: *****

Kroll Factual Data Flood Account Code:

*ServiceLink Flood Account: LPS Flood

*ServiceLink Flood Account Code: 1000186854

*DocMagic Account: DocMagic Main Account

*DocMagic Customer Id: 232187

*DocMagic Username: fcbdocs@yahoo.com

*DocMagic Password: *****

LP Credit Vendors

Add Cancel

After Completing all of the required fields marked by a red asterisks and selecting Add scroll down to the Vendor Account section

Note: Please utilize the screen shot to double check that these vendor's profiles are the vendors showing up on your screen.

Hide LP Credit Vendors

Credit Vendor	Setup With LP
CBCLInnovis, Inc.	<input type="checkbox"/>
CREDCO/Credstar/CBA	<input type="checkbox"/>
Equifax Mortgage Solutions	<input type="checkbox"/>
Kroll Factual Data	<input type="checkbox"/>
LandAmerica	<input type="checkbox"/>

Update Cancel

Once you have double checked the vendor information scroll down to the bottom left corner of the screen: **select the LP Credit Vendors.**

This will allow you to link the users profile to the credit report when running LP.

Select the credit vendor that your company utilizes then click **update.**

User Profile

Any field with an asterisk (*) is a required field.

*Status: Active

*User ID: otest

*First Name: originator

*Last Name: test

*Loan Originator ID (NMLSR): 234564

Employee Number:

*Address: 123 Here Street

*City: Jacksonville

*State: FL

*Zip: 32216

*Phone: 904-245-7100

*Fax: 904-245-7100

*Email: jring@flcb.com

*Group: B

Institution Configuration

Select Institutions Please select at least one institution.

*DU Account: Florida Capital Accou

*DU Institution ID: 345602

*Early Check Institution ID: 345602

*DU Username: c24x4lrm

*DU Password: *****

Kroll Flood Account:

User ID:

Kroll Flood Password: *****

Kroll Flood Account Code:

*DocMagic Account: DocMagic Main Accou

*DocMagic Customer Id: 232187

*DocMagic Username: flcbdocs@y aahoo.com

*DocMagic Password: *****

Change Password

Click **Select Institution** and after completing the steps above, click **Update**.

Assign Institutions

Search for Institutions

Channel: [dropdown]
 Institution: [dropdown]
 Create/edit own loans:

Channel	Institution ID	Institution Name	Loans Originated	Home Institution	Create/edit own loans	Main Contact
PW1	93881	Wholesale Broker Test Institution (T1)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
W1 - Wholesale	test	test	0	<input type="checkbox"/>	<input type="checkbox"/>	

Page 1 of 1 | 100 per page

Help

Create/edit own loans
 Allows this user to view, create, and edit loans under his/her own user account in the selected institutions. If the user has originated loans in an institution, then the user cannot be unassigned from that institution until the loans are transferred to a different originator.

Main Contact
 Sets this user as the main contact for the institution. The Main Contact field is only available if the user has permission to either "Create/edit own loans" or "Create/edit others' loans". This setting can also be administered through the Institutions Admin section. There can only be one main contact per institution - if you check this field, it will overwrite the current Main Contact for the institution with your new selection.

Originator User:

Select the radio button **Home Institution** and select the check box **Create/edit own loans**.

Click **Save**.

Assign Institutions

Search for Institutions

Channel: [dropdown]
 Institution: [dropdown]
 Create/edit others' loans: [dropdown]

[Search]

Channel	Institution ID	Institution Name	Create/edit others' loans	Assigned Originators	Main Contact
Select All					
PW1	93661	Wholesale Broker Test Institution (T1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
W1 - Wholesale	test	test	<input checked="" type="checkbox"/>	<input type="checkbox"/> Edit	<input type="checkbox"/>

Page 1 | 100 per page

[Save] [Cancel]

Help

Create/edit others loans	Allows this user to view, create, and edit loans on behalf of other originators in the selected institutions.
Assigned Originators	Allows you to configure which originators this user can view, create, and edit loans on behalf of. By default, users are allowed to view, create, and edit loans for all originators in the selected institutions.
Main Contact	Sets this user as the main contact for the institution. The Main Contact field is only available if the user has permission to either "Create/edit own loans" or "Create/edit others' loans". This setting can also be administered through the Institutions Admin section. There can only be one main contact per institution - if you check this field, it will overwrite the current Main Contact for the institution with your new selection.

Processor User:

Select the check box **Credit/edit others' loans** and click **Edit** under the **Assigned Originators**.

Select the originators the processor is assigned to.

Assign Originators

User ID	First Name	Last Name	Assigned Originators
Select All			
Broker-Test	BrokerA	Test	<input type="checkbox"/>
BrokerB-Test	BrokerB	Test	<input checked="" type="checkbox"/>
Jackietest	Jackie	Test	<input checked="" type="checkbox"/>
avista7	Mortgagebot	Tester	<input type="checkbox"/>

[Save] [Cancel]

Click **Save**. The previous page is now accessible again. If done assigning originators, click **Save**.

Assign Institutions

Search for Institutions

Channel: [dropdown]
 Institution: [dropdown]
 Create/edit own loans: [dropdown]
 Create/edit others' loans: [dropdown]

[Search]

Channel	Institution ID	Institution Name	Loans Originated	Home Institution	Create/edit own loans	Create/edit others' loans	Assigned Originators	Main Contact
Select All			Select All					
PW1	93661	Wholesale Broker Test Institution (T1)	0	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Edit	<input type="checkbox"/>
W1 - Wholesale	test	test	0	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Edit	<input type="checkbox"/>

Page 1 | 100 per page

[Save] [Cancel]

Help

Create/edit own loans	Allows this user to view, create, and edit loans under his/her own user account in the selected institutions. If the user has originated loans in an institution, then the user cannot be unassigned from that institution until the loans are transferred to a different originator.
Create/edit others loans	Allows this user to view, create, and edit loans on behalf of other originators in the selected institutions.
Assigned Originators	Allows you to configure which originators this user can view, create, and edit loans on behalf of. By default, users are allowed to view, create, and edit loans for all originators in the selected institutions.
Main Contact	Sets this user as the main contact for the institution. The Main Contact field is only available if the user has permission to either "Create/edit own loans" or "Create/edit others' loans". This setting can also be administered through the Institutions Admin section. There can only be one main contact per institution - if you check this field, it will overwrite the current Main Contact for the institution with your new selection.

Manager User:

Select the check box **Create/edit own loans** and select the radio button **Home Institution**. Also select the check box **Create/edit others' loans**.

As a Manager User, you do NOT need to assign individual originators. You will automatically be assigned to all.

Click **Save**.

IMPORTANT: After you have completed the setup process above, the user will receive an email from EnterpriseLOS@mortgagebot.com that will contain a **temporary password**. The user must activate the password within **10 minutes** of receiving the email or it will expire. If the password expires, the Delegated Administrator must go back to the users profile and reset the password by selecting **Change Password then click update**. This will generate another email with a new temporary password.

User Profile

Any field with an asterisk (*) is a required field.

*Status: Inactive

*User ID: jring1

*First Name: jackie

*Last Name: test

*Loan Originator ID (NMLSR): 123456

Employee Number:

*Address: 4815 Executive park court

*City: jacksonville

*State: FL

*Zip: 32216

*Phone: 904-245-7096

*Fax: 904-245-7096

*Email: jring@flcb.com

*Group: B

Institution Configuration

Select Institutions: test
Wholesale Broker Test Institution (T1)

*DU Account: Florida Capital Account

*DU Institution ID: 345602

*Early Check Institution ID: 345602

*DU Username: c24x4lrm

*DU Password: *****

Kroll Flood Account:

User ID:

Kroll Flood Password: *****

Kroll Flood Account Code:

*DocMagic Account: DocMagic Main Account

*DocMagic Customer Id: 232187

*DocMagic Username: flcbdocs@yahoo.com

*DocMagic Password: *****

Change Password

Update Delete Cancel

If an employee leaves the company:

Go to the users profile; **select Inactive** from the drop down box.

Click **Update**.