How to Manage Users

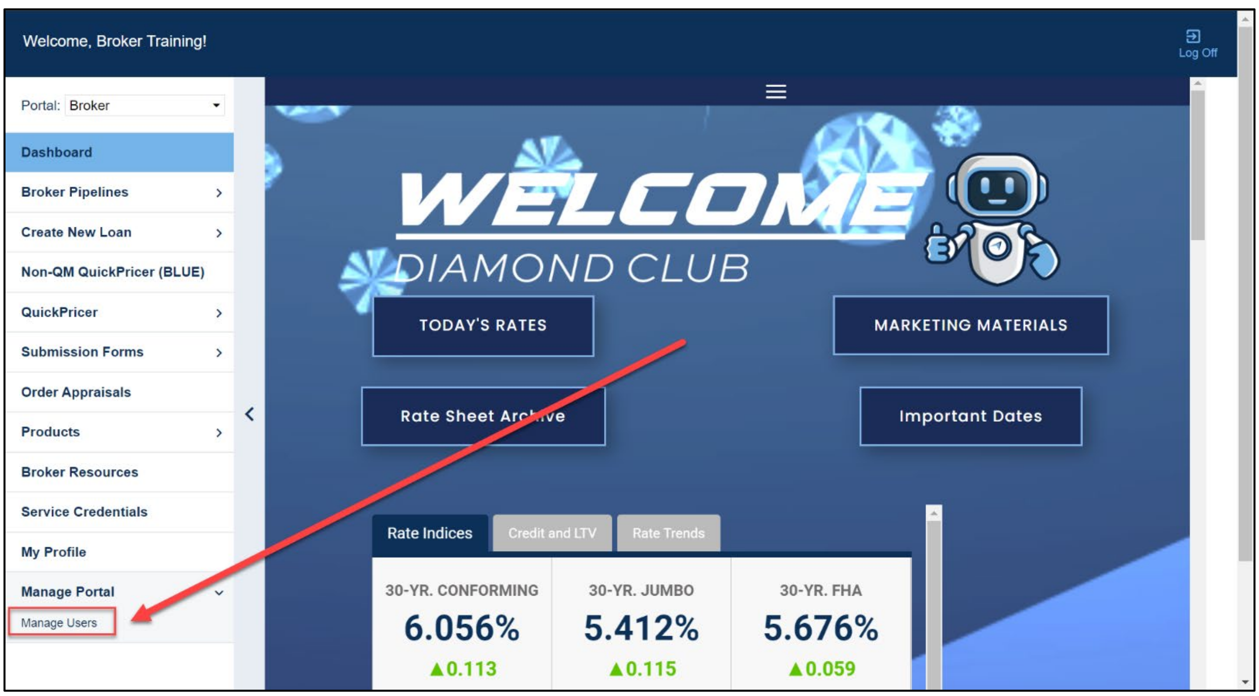
Contents

Introduction

Your organization will have at least one administrator that can manage user permissions and credentials within our broker portal. Since you're reading this guide, we assume you're one of the administrators. Welcome!

Getting There

After logging into our broker portal, go to **Manage Portal > Manage Users**:



If you do not see this tab, please contact our Broker Desk to give you supervisor permissions.

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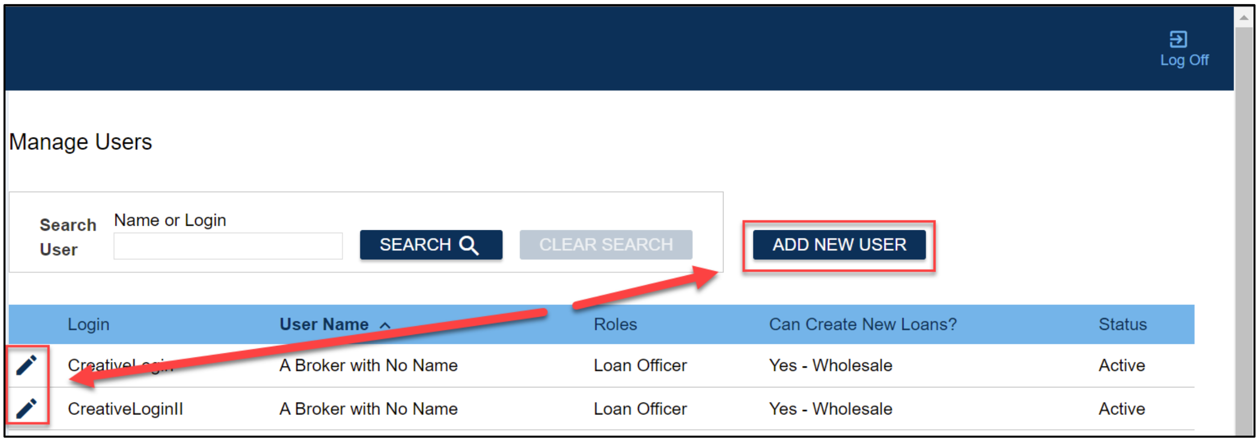
There will be a list of user accounts under your supervision. Click “Add New User” to create a new login, or click on the pencil icons to update an existing login:



If you do not see an account that you know exists, please contact our Broker Desk.

Overview of Permissions

Tab Name	Description
User Information	For loan officers/originators: The name must match what’s shown in NMLS. **Send task-related email**: If selected, the user will receive notifications of loan tasks and conditions assigned by BPM.
Credentials	**Status**: If the user account should be disabled, select “Inactive”.
Roles, Loan Access, & Permissions	**Loan Access Level** • **Corporate**: Allows the user to see all loans originated from your company. • **Individual**: The user only sees loans they’re assigned to. **Permissions** • **Allow viewing wholesale channel loans**: The user will have access to loans depending on their Loan Access Level. • **Allow creating wholesale channel loans**: The user can create new loans within the portal.
Licenses	NMLS and licensing information should be saved here. This information will populate onto loan disclosures, so we strongly recommend that the data on this page is complete and up to date to minimize delays in the loan process.

System Access	**Enable auth code transmission via SMS text**: Should be enabled for all users; 2-factor authentication is required for all accounts.
Services	Credentials for 3rd party services (AUS, etc.) should be saved here.

Questions?

Please email our Broker Desk at brokerdesk@bluepointmtg.com if you have questions about user permissions.

Thank you for choosing BluePoint Mortgage!