





















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".



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

18

Click "Correspondent Relationships"

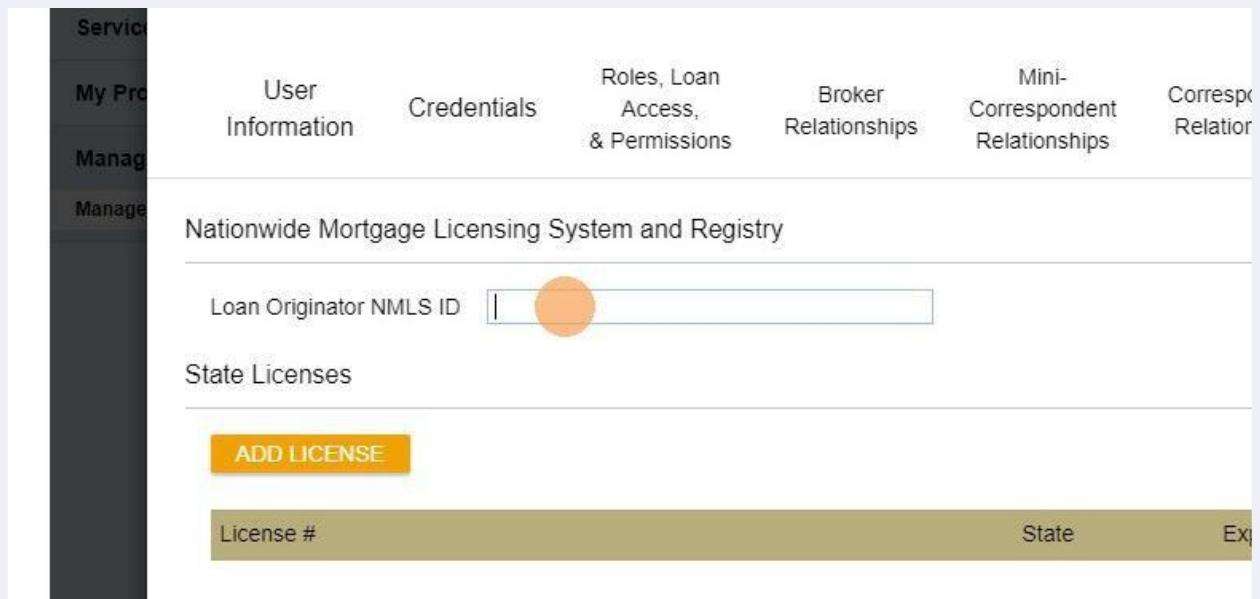
The screenshot shows a user management interface. At the top, there is a dark header with the text "Users" and a close button (X) in the top right corner. Below the header is a navigation menu with several items: "Roles, Loan Access, & Permissions", "Broker Relationships", "Mini-Correspondent Relationships", "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 -->".

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
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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.

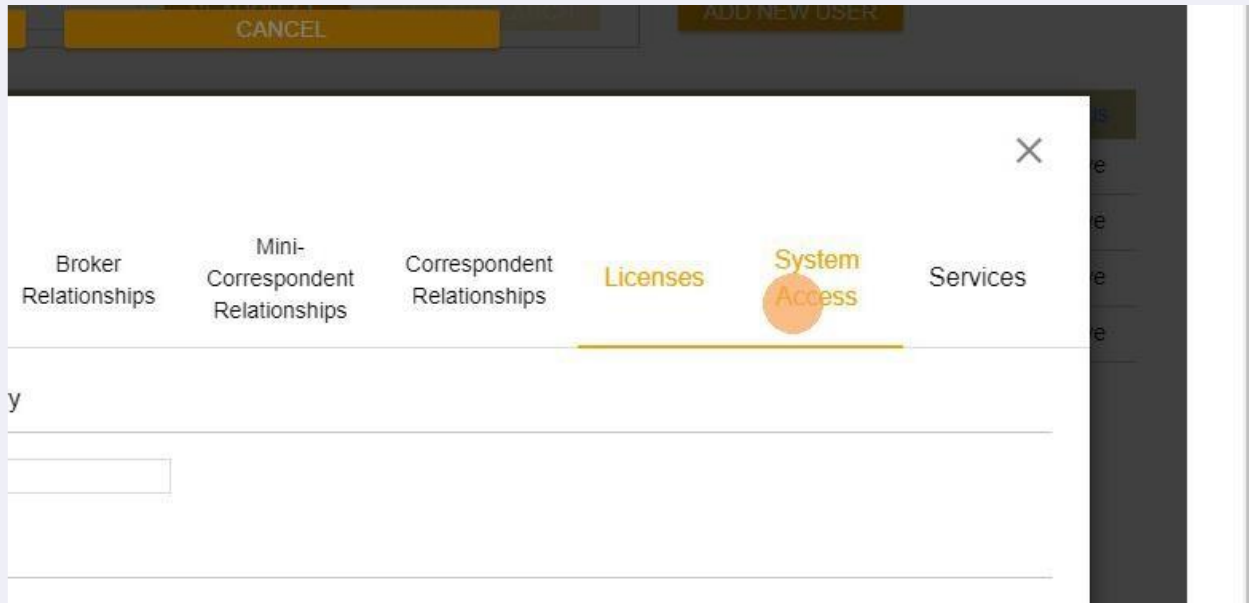
5551212

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

**APPLY** **CANCEL**

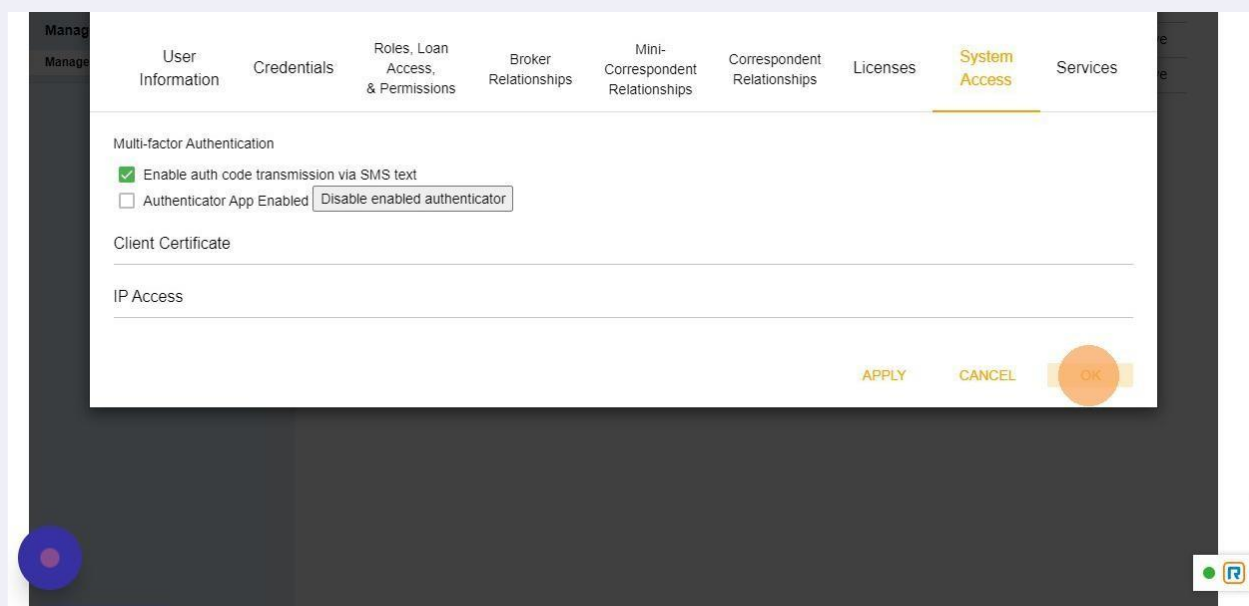
AZ  
CA  
CO  
CT  
DC  
DE  
FL  
GA  
HI  
IA  
ID  
IL  
IN  
KS  
KY  
LA

**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".