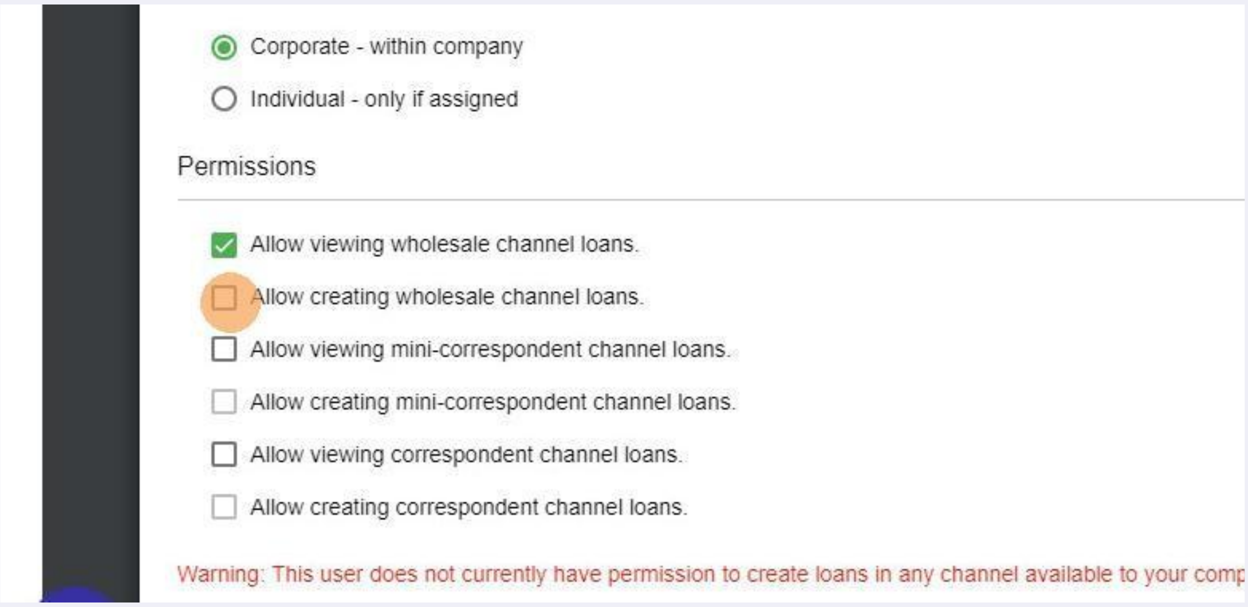
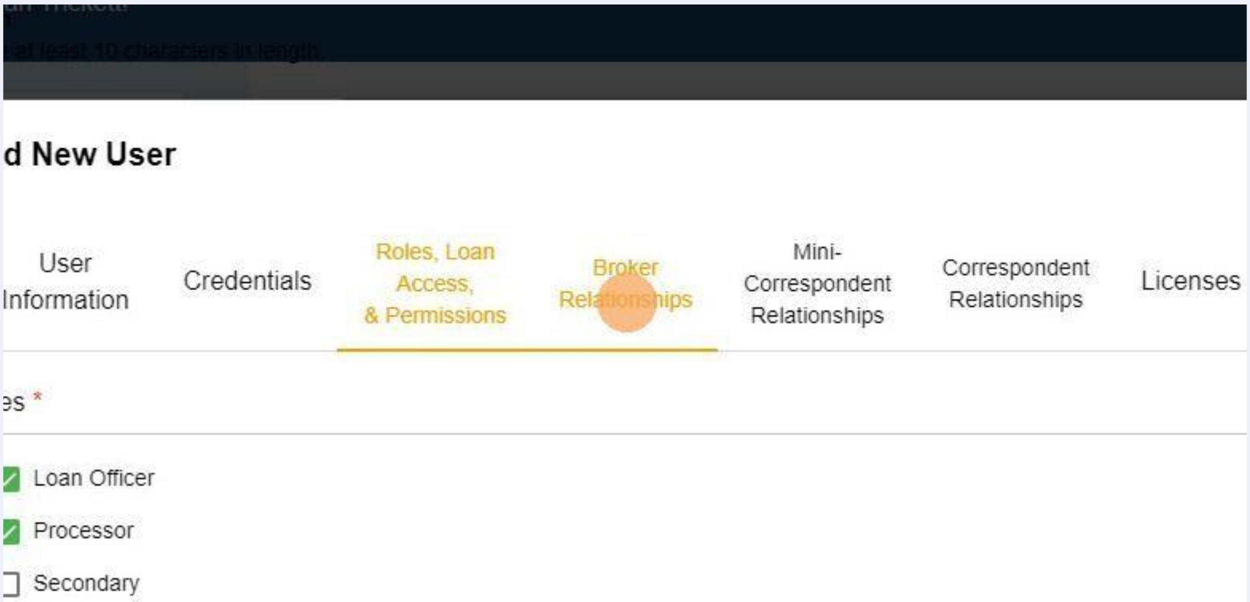
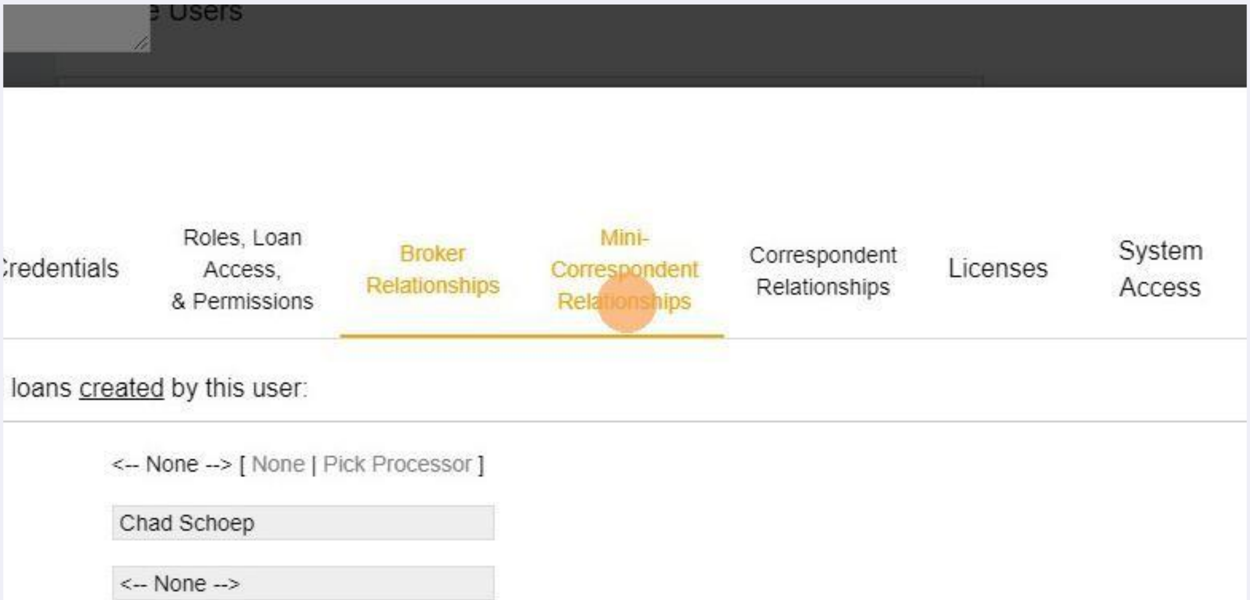
15 **Click the "Allow viewing/creating wholesale channel loans" option. This will enable your user to conduct business as a wholesale LO/Processor.**



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

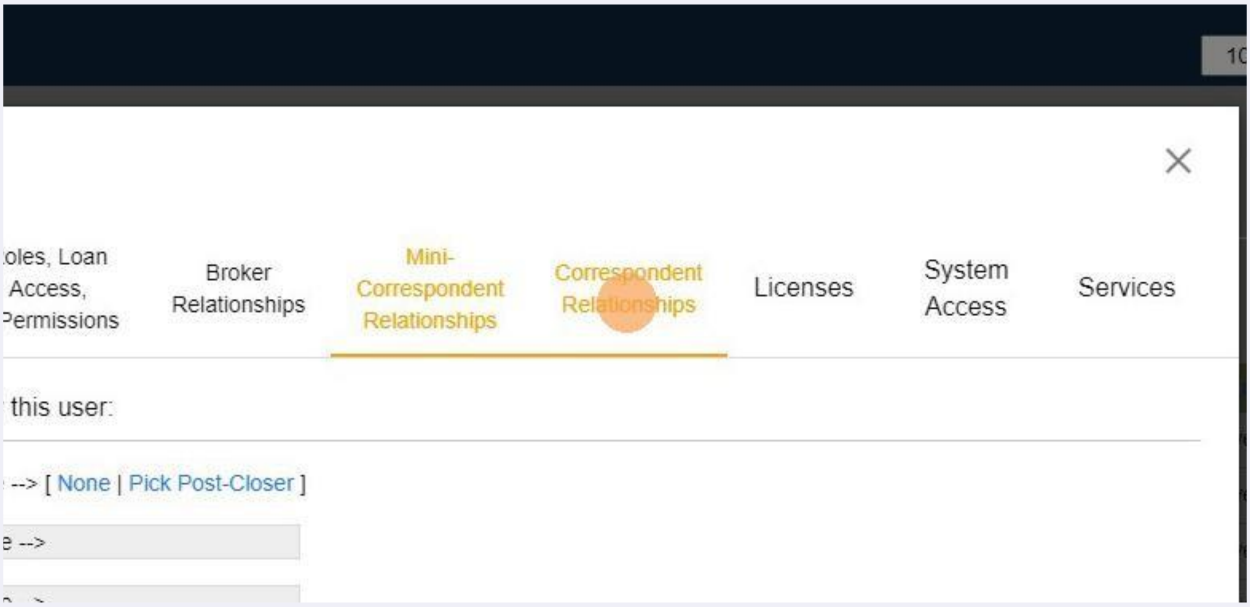


17 **Click "Mini-Correspondent Relationships"**

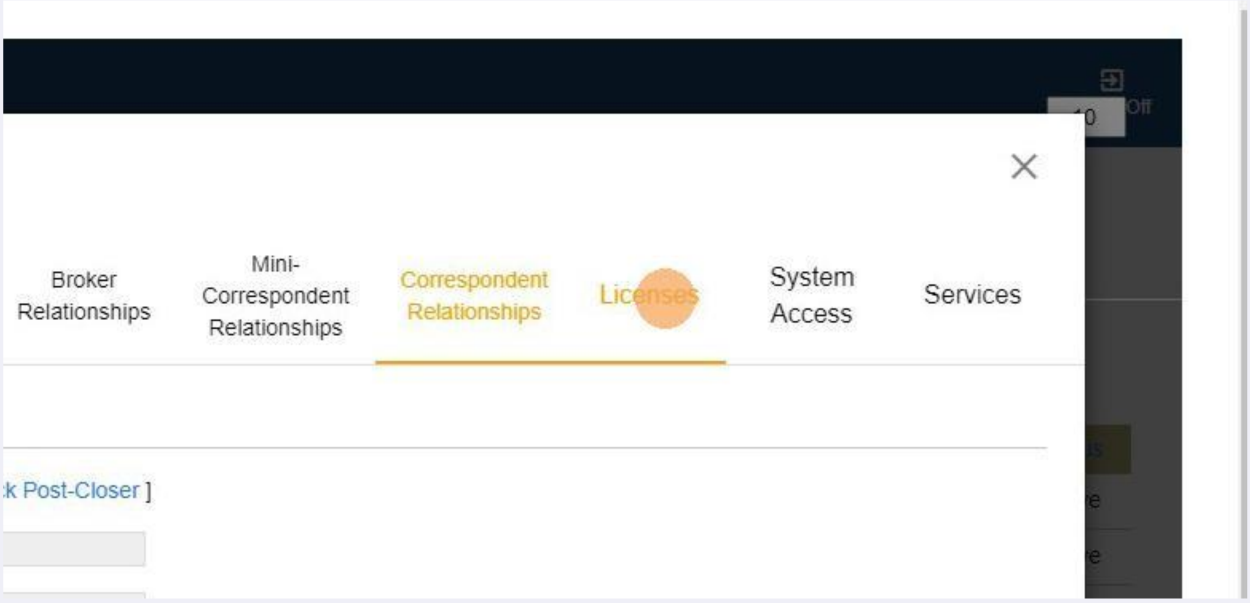


⚠ **Alert! Alert! See your AE before making these assignments. These access levels will depend on our partnership level.**

18 **Click "Correspondent Relationships"**

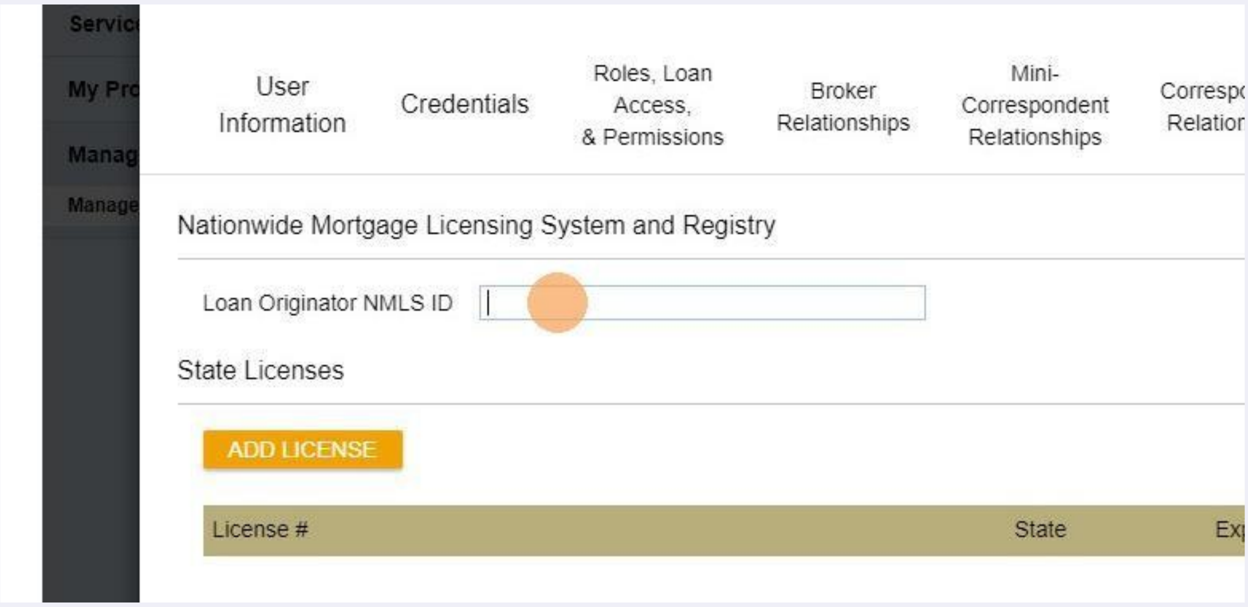


19 Click "Licenses"

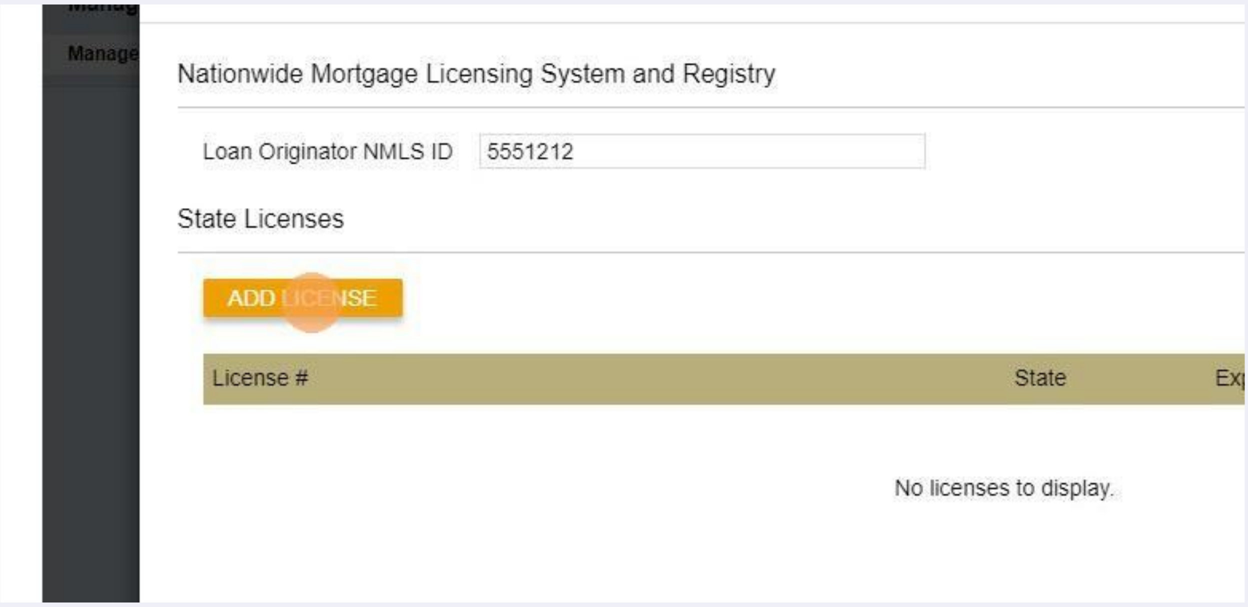


Tip! You will need the NMLS number and every state license number associated for this user. It is common for an NMLS number to represent multiple state licenses.

20 Click this text field.

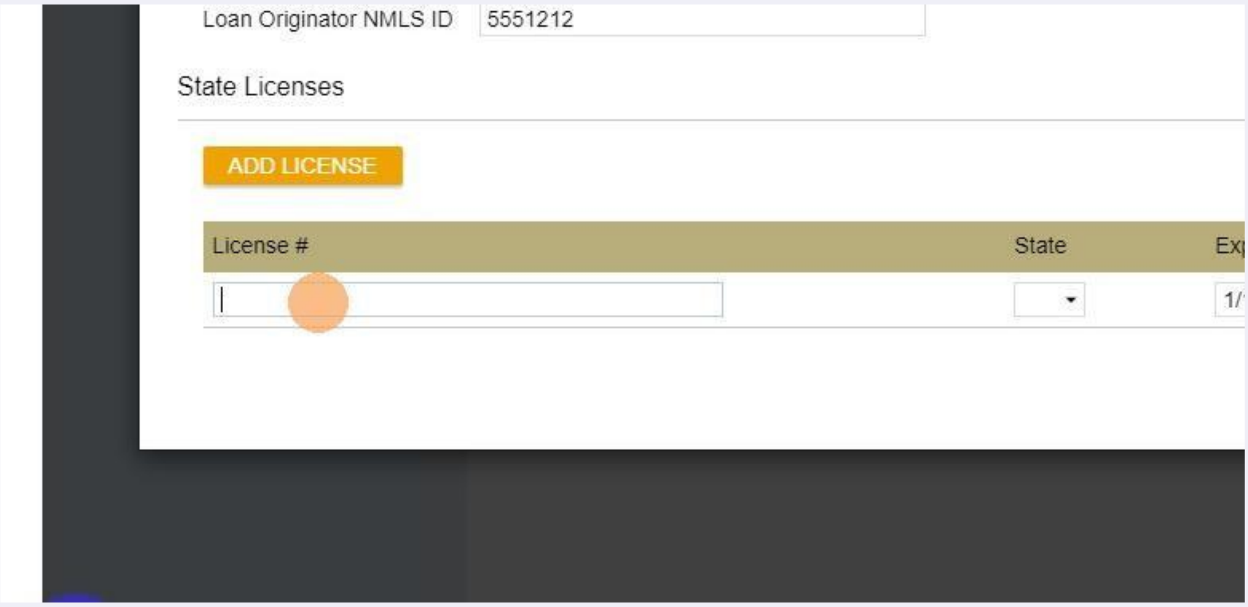


21 Click "ADD LICENSE"

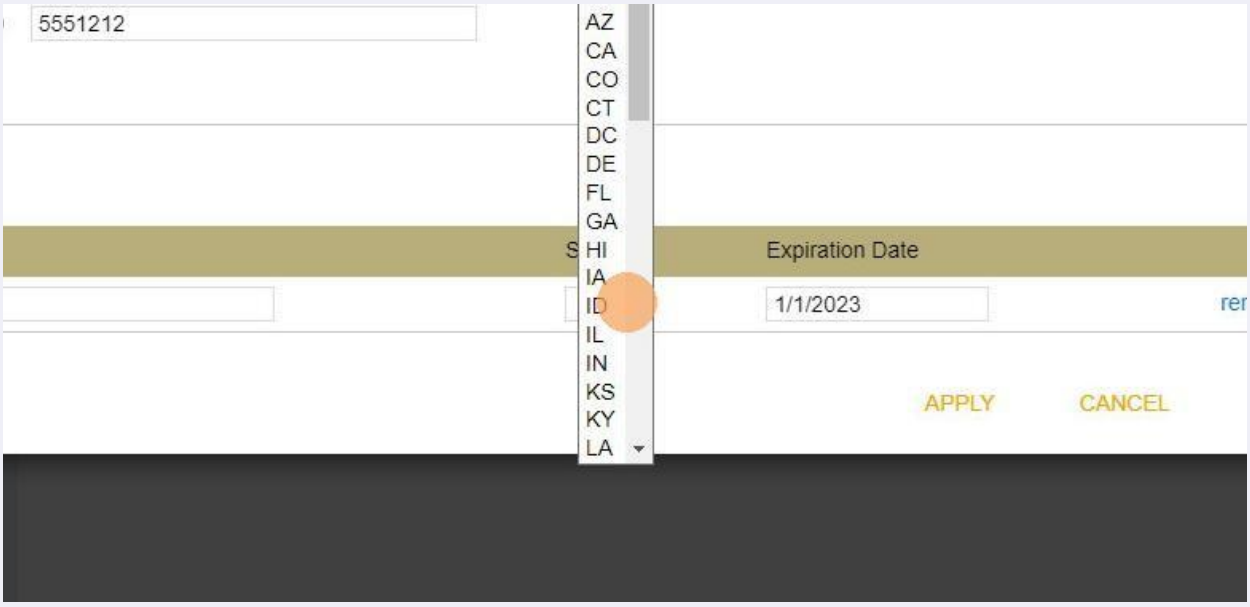


Tip! Keep the default expiration date for state licensing. Since these generally expire at the end of each calendar year, you will need to maintain these profiles on an annual basis with the most up to date licensing information.

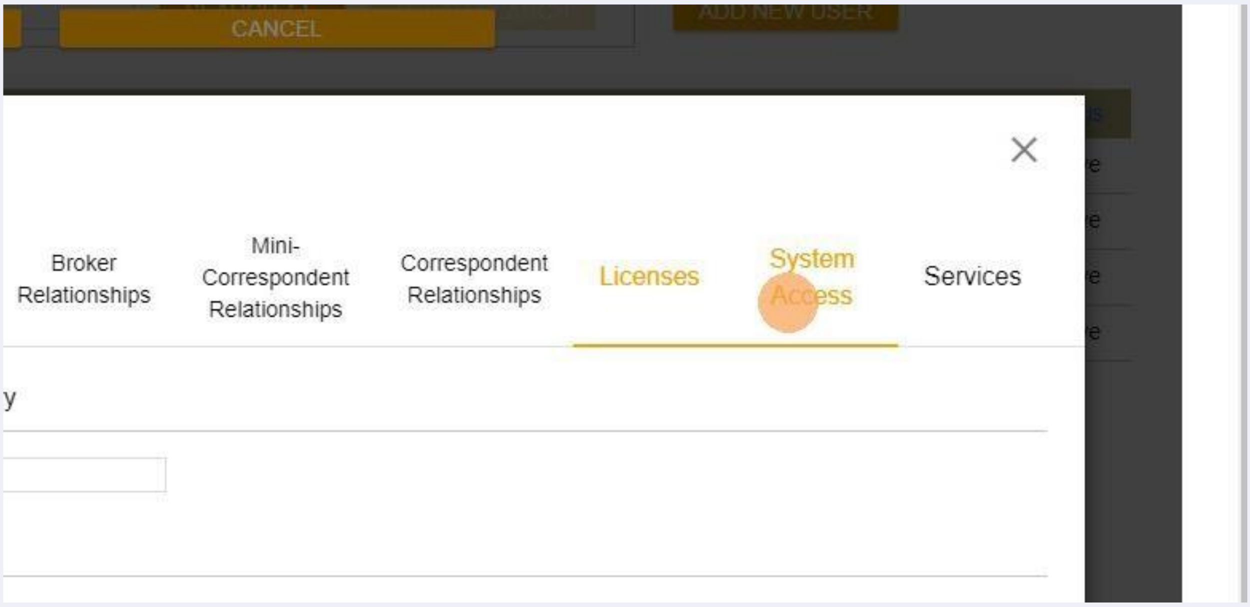
22 Click this text field.



23 Click this dropdown to select the appropriate state license.

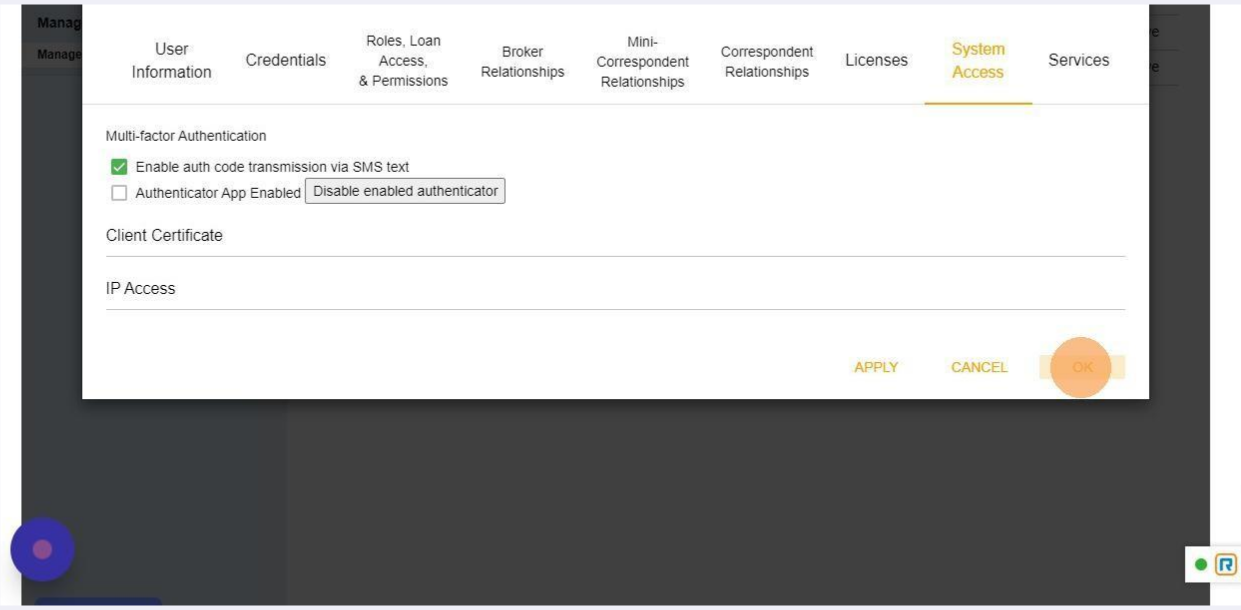


24 Click "System Access"



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".