Adding Users to the Website

Revised 06/20/2025

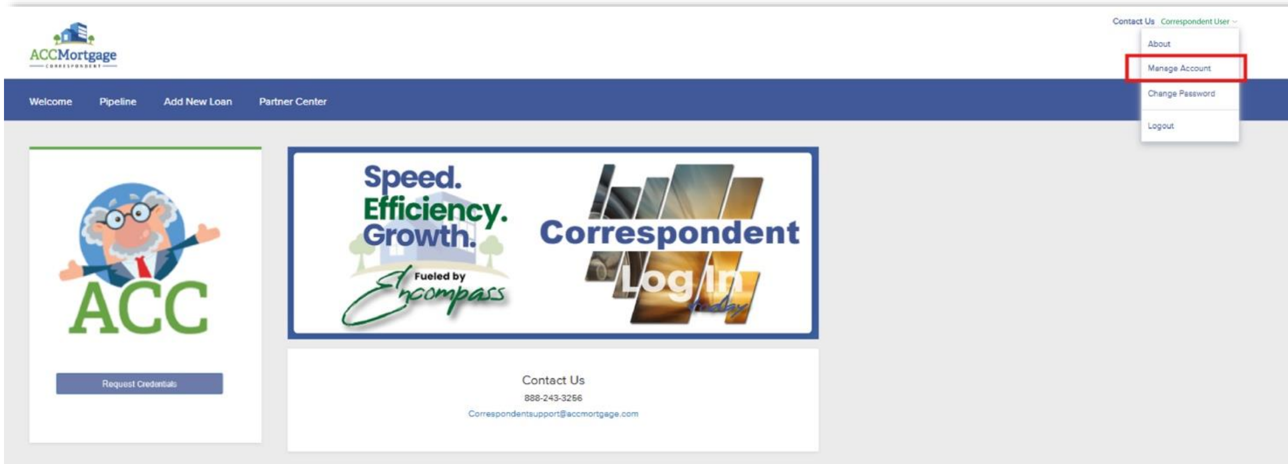
ACCMortgage
CORRESPONDENT

Creating Contact Record

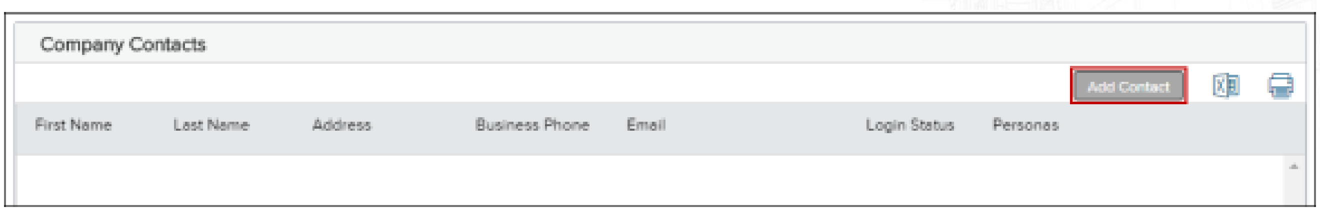
In order for other users to gain access to the website, the manager must create a contact record for each user.

To Create a Contact Record:

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



2. Click on 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.

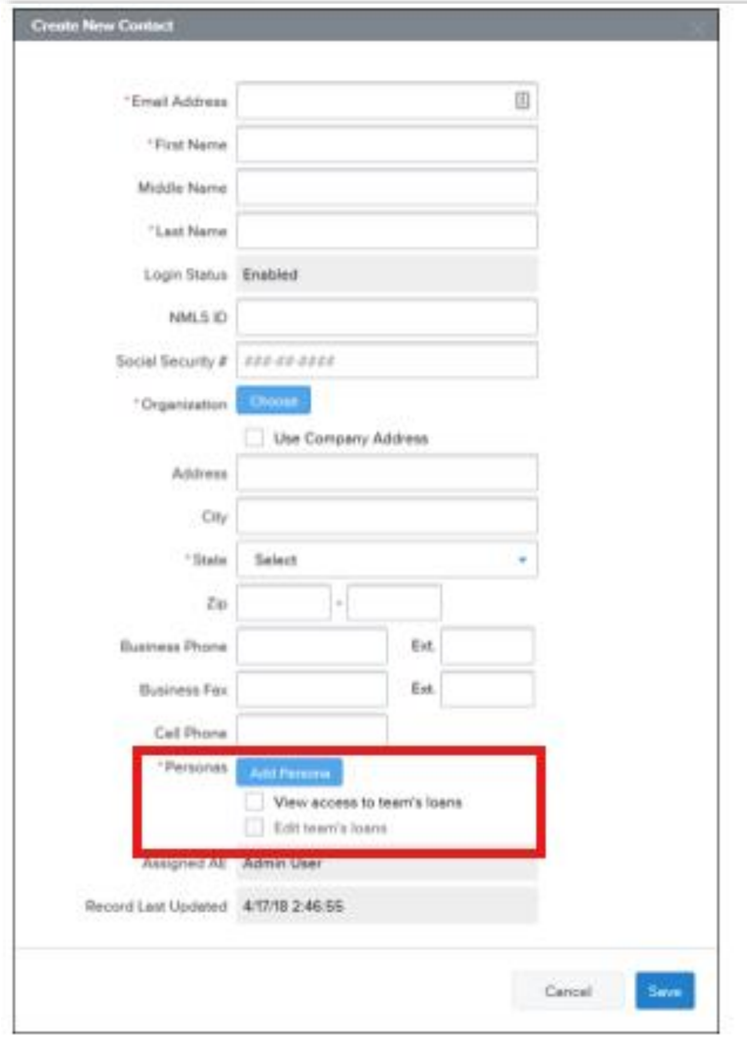


User Information

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**.

NOTE: If the user requires access to view/Edit ALL loans, the "View access to team's loans" and "Edit Team's loans" boxes must be checked.



Persona Roles:

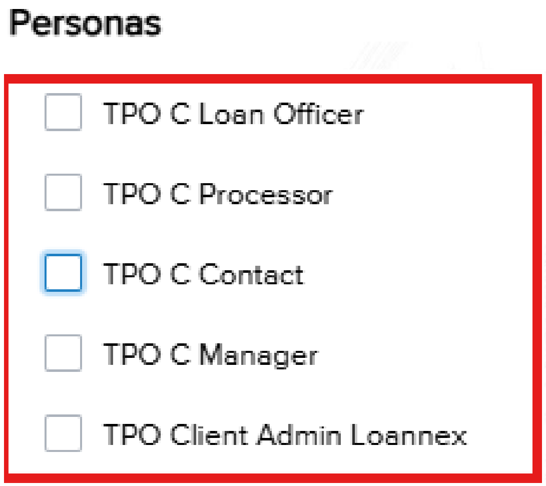
TPO C Loan Officer - this role allows the user to create and manage their existing loans (this does not need to be the loan officer but will be on all communication from registration to CTC)

TPO C Processor - this role allows the user access to register loans, ability to submit files for review, and view multiple LO pipelines. This should be your post closer, processor, (They will be on all communication from registration to CTC)

TPO C Contact - this is the contact for any purchase related items

TPO C Manager - this role allows the user to create other users through the portal

TPO Client Admin Loannex- this role allows the user to view/manage Loannex (Loannex Sell Side Agreement must also be completed)



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

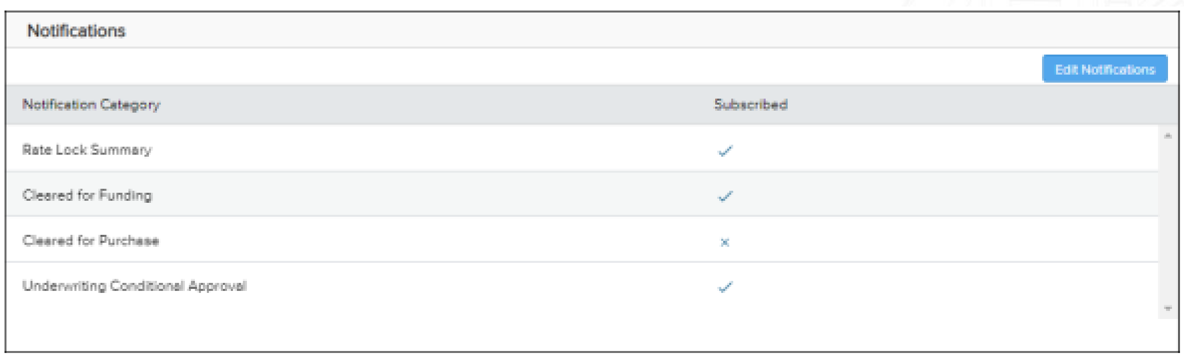
The user will receive an email that provides a link to the website, along with a log in name (their email address) and a temporary password. The user can log in to the website, however their licensing information needs to be submitted to, and then approved by, our company before they can submit loan files. (This rule applies to branches that will use the website as well.)

Submit user or branch licensing information to:

Add contact information for licensing information reviewer(s)

Notifications

The Notifications section enables managers to define which notifications are available to TPOs. Additionally, TPOs can also determine which email notifications they want to receive. The notification templates are defined by the administrator and then selected by the TPO users in TPO Connect. The notifications section displays any notifications that the user is subscribed to.


Notifications

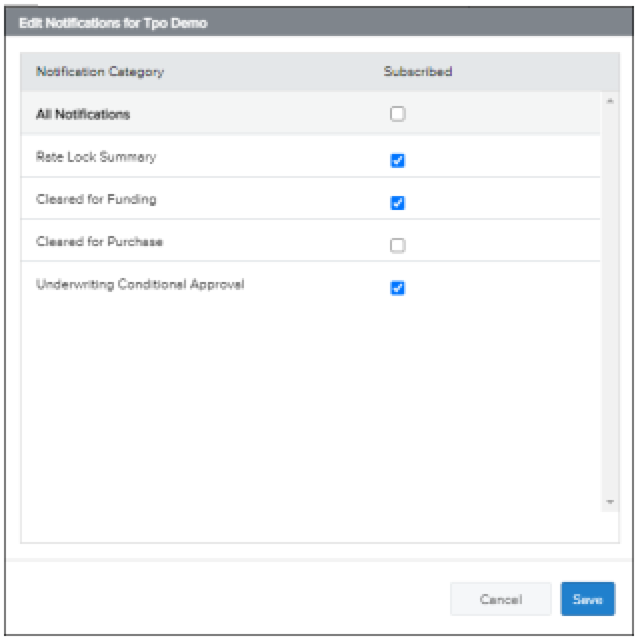
Edit Notifications

Notification Category	Subscribed
Rate Lock Summary	✓
Cleared for Funding	✓
Cleared for Purchase	×
Underwriting Conditional Approval	✓

Notifications

To Select which Notifications to Subscribe to:

1. After logging into the TPO Connect website, click your username in the top right corner.
2. Click **Manage Account**.
3. Scroll to the Notifications section and click **Edit Notifications**.
4. On the Edit Notifications window, select the checkbox next to the notifications you want to subscribe to.



5. Click **Save**.

Note: TPO users only see notifications that have been assigned to them by their TPO Manager. TPO Connect does not display Notification Templates with the "Other" category. Any notifications assigned to that category will not be available to TPO users.