# Correspondent Administration: Creating New Users

If you have the 'Corr Admin' persona, you have access to create and manage user accounts for your company.   When logged in to the Correspondent Client Portal, click the caret to the right of your name in the upper right-hand corner. If you see 'Manage Account', you have admin access.   Users who do not see this option do not have admin access. Click 'Manage Account' then click the 'Company Account' tab:
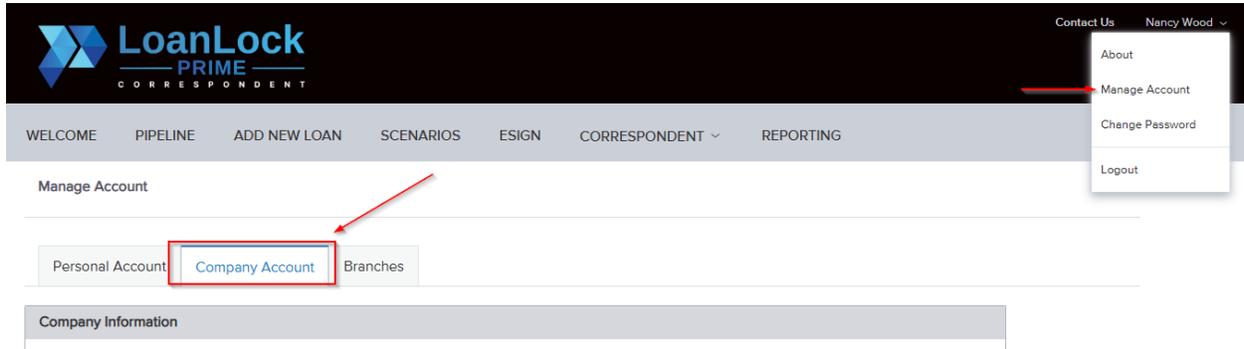
Scroll down to 'Company Contacts' and click 'Add Contact':
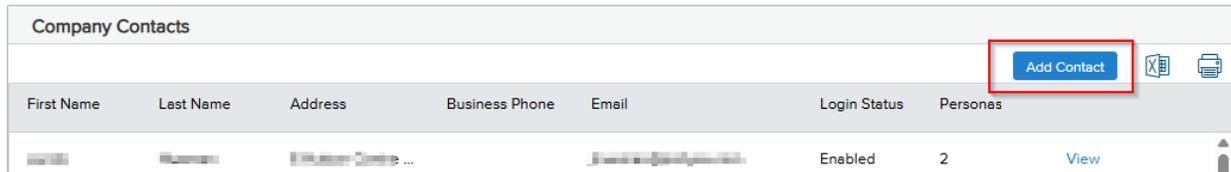
Complete all applicable 'Create New Contact' fields to accurately set up the user.

IMPORTANT: If you receive the error message 'An Error Occurred: Conflict – Login Email is already in use.", this indicates that this user has an existing account under a different company or channel also using that email address. You will still enter their email address in the 'Email Address' field, but you will need to enter a different email address for '**Login** Email Address'. This is ONLY used for login purposes as their User Name.

An easy solution to this would be to add 'corr' in the body of their email address:

You are free to make any other user name so long as you retain the email address format.
I.e.: Processor_Corr@yourcompany.com or CorrLO@yourcompany.com would both suffice.

Enter their business phone number and **enter their cell phone number for two factor authentication**. Please confirm the accuracy of these data points.

Click 'Choose' next to Organization and select/save the Corporate Office. Check 'Use Company Address'.

* Email Address   loanofficerorprocessor@yourcompany.com

* First Name   Joe

Middle Name

* Last Name   Loan

Login Status   Enabled

* Login Email Address   loanofficerorprocessor@yourcompany.com

NMLS ID   1234567

Social Security #   ###-##-####

* Organization   Choose

☐ Use Company Address

Address

City

* State   California

Zip   —

Business Phone   **Ext.**

Business Fax   Ext.

Cell Phone

* Personas   Add Persona

☐ View access to team's loans

☐ Edit team's loans

Assigned AE

Record Last Updated

Cancel   Save

Click 'Add Persona' next to Personas and choose/save the user's assigned role(s). Only the personas listed below will apply to the correspondent channel. Adding any additional personas that may be listed will not result in any functionality.

Personas

- Corr Loan Officer
- Corr Loan Processor
- Corr Post Closer
- Corr Secondary
- Corr Admin

*Corr Admin – responsible for creating new users and adjusting roles/access. Use discretion when granting this persona. Most companies only have 1 or 2 admins.

Corr Loan Officer – licensed MLO under state or federal SAFE Acts. If an LO prices/locks their own loans, the Corr Secondary role should also be selected, but prevent them to View or Edit Team's loans. If an LO processes their own loans, the processor role should be selected as well.

Corr Loan Processor – responsible for preparing, organizing, and submitting loan files but is not always licensed. A processor may not originate without a SAFE Act mortgage loan originator license.

Corr Secondary – has access to view pricing, register, and lock

Corr Post Closer – responsible for preparing, organizing, and delivering loans for purchase. This contact will receive the purchase advise.

The chosen persona(s) will be listed and can be edited, if necessary:

* Personas   Corr Loan Officer , Corr Loan Processor , Corr Secondary

Edit Persona

Finally, choose the user's loan access:

- Making no choice will result in the user only having access to view and edit loans that they are explicitly assigned to

- Check 'View access to team's loans' if they should only view loans that they are not assigned to

- Check 'Edit team's loans' if they should be able to edit loans that they are not assigned to

Click 'Save' at the bottom to create the user and send their Welcome Email.