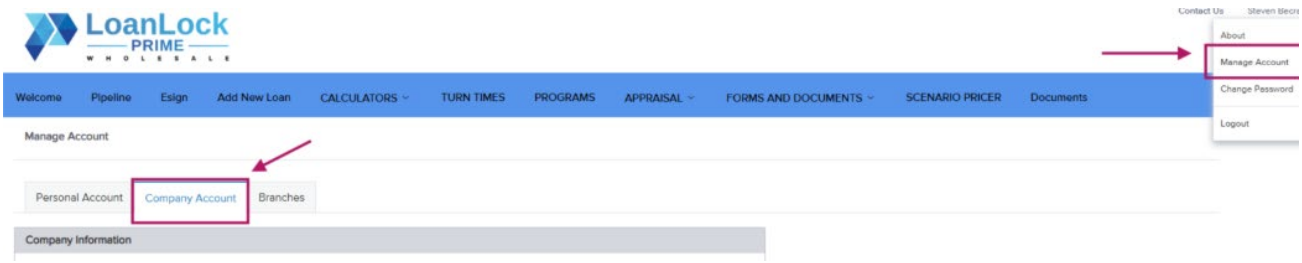
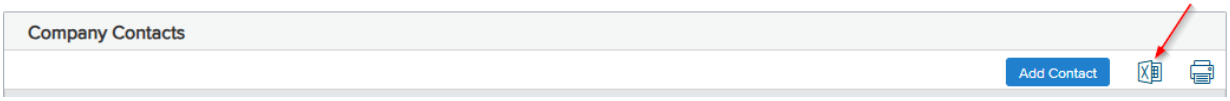
Broker Administration: Downloading User Data / User Edits

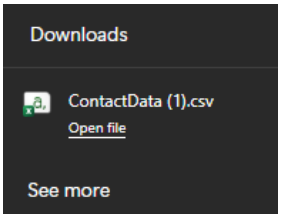
If you have the 'WHL Admin' persona, you have access to create and manage user accounts for your company. You can download a user list to review persona access. When logged in to the TPOC Client Portal, click the caret to the right of your name in the upper right-hand corner. If you see 'Manage Account', 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:



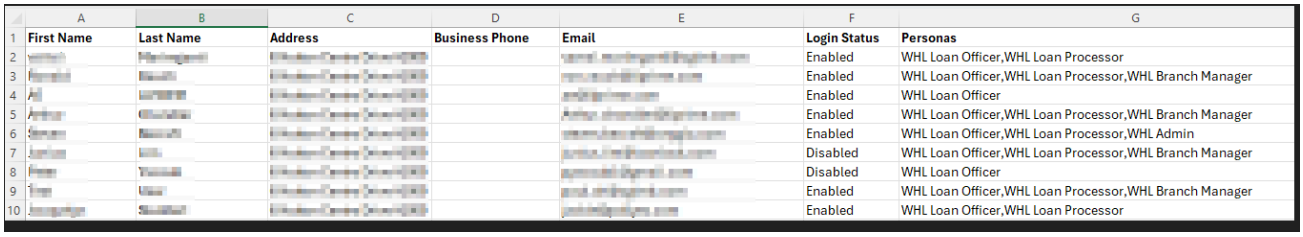
Follow the steps outlined above. Scroll down to 'Company Contacts', click the excel icon on the top right of the Company Contacts list:



Open the file from your Downloads:



On the excel list, you can review all users and their login statuses and personas:



	A	B	C	D	E	F	G
1	First Name	Last Name	Address	Business Phone	Email	Login Status	Personas
2	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor
3	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor,WHL Branch Manager
4	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer
5	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor,WHL Branch Manager
6	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor,WHL Admin
7	[redacted]	[redacted]	[redacted]		[redacted]	Disabled	WHL Loan Officer,WHL Loan Processor,WHL Branch Manager
8	[redacted]	[redacted]	[redacted]		[redacted]	Disabled	WHL Loan Officer
9	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor,WHL Branch Manager
10	[redacted]	[redacted]	[redacted]		[redacted]	Enabled	WHL Loan Officer,WHL Loan Processor

Any edits to the user's data can be made by viewing their contact details in Company Account (follow steps above) > Company Contacts > find contact in Company Contacts list, click 'View' > click 'Edit Information' > make change > click 'Save'