

Adding Users to TPO Connect

For other users to gain access to the website, the Administrator 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 the **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 portal.
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 your 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 each Contact. Click Add Persona and then select one or more personas for that individual. and click Save.

Note: To view Purchase Advice a persona of TPO Manager is required. TPO Loan Officer is view only.

Create New Contact

* Email Address


* First Name

Middle Name

* Last Name

Login Status

NMLS ID

Social Security # 

* Organization

☐ Use Company Address

Address

City

* State

Zip -

Business Phone Ext.

Business Fax Ext.

Cell Phone

* Persons

Assigned AE

Record Last Updated

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 then log into the portal.