User Profiles - Web Set Up Guide

newrezcorrespondent.com

3 Different User Profiles: Please use the following Key to determine best practices for access to the NewRez website

1 Management Team – All access, can create and manage users along with manage user access

Please select as least one other person to be a User Manager. Changes to individual user profiles will need to be done by a company assigned User Manager

2 Operational Staff – Targeted Access for Processing, Closing, Funding

3 Sales Staff – Basic access for Loan Officers and support staff

TIPS:

--Make sure to complete all required information in the User Information Section – also check the radio button for enabling user access

--Always select Save User once the profile has been completed

--You will need to email the individual user their assigned login and temp password once the account has been created

*** Loan Status and Reports have the ability to view Pricing**

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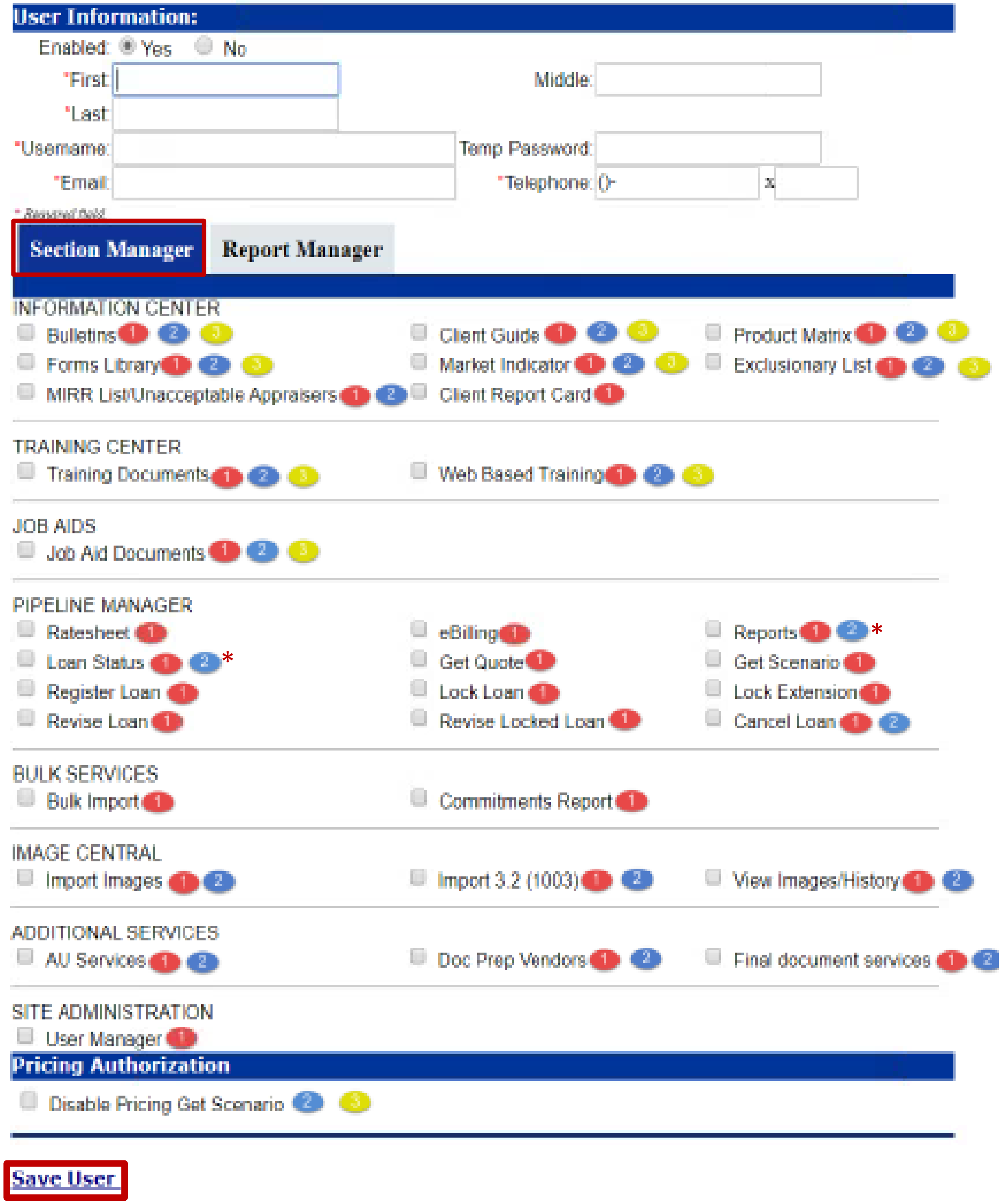

User Information:

Enabled: Yes No

*First: Middle:

*Last:

*Username: Temp Password:

*Email: *Telephone: ()- x

* Required field

Section Manager | **Report Manager**

INFORMATION CENTER

- Bulletins 1 2 3
- Forms Library 1 2 3
- MIRR List/Unacceptable Appraisers 1 2
- Client Guide 1 2 3
- Market Indicator 1 2 3
- Client Report Card 1
- Product Matrix 1 2 3
- Exclusionary List 1 2 3

TRAINING CENTER

- Training Documents 1 2 3
- Web Based Training 1 2 3

JOB AIDS

- Job Aid Documents 1 2 3

PIPELINE MANAGER

- Ratesheet 1
- Loan Status 1 2 *
- Register Loan 1
- Revise Loan 1
- eBilling 1
- Get Quote 1
- Lock Loan 1
- Revise Locked Loan 1
- Reports 1 2 *
- Get Scenario 1
- Lock Extension 1
- Cancel Loan 1 2

BULK SERVICES

- Bulk Import 1
- Commitments Report 1

IMAGE CENTRAL

- Import Images 1 2
- Import 3.2 (1003) 1 2
- View Images/History 1 2

ADDITIONAL SERVICES

- AU Services 1 2
- Doc Prep Vendors 1 2
- Final document services 1 2

SITE ADMINISTRATION

- User Manager 1

Pricing Authorization

- Disable Pricing Get Scenario 2 3

Save User

UW Status, Scenarios & Product Questions: 877-700-4622 Follow the Prompts

User Information:

Enabled: ( ) Yes ( ) No

*First: | Middle:

*Last:

*Username: | Temp Password:

*Email: .com | *Telephone: (123)456-7890 x

** Required field*

Section Manager | **Report Manager**

- [ ] All Reports **Reports in bold and italics display Final Price*

- [ ] All Registration
  - [x] Registered/Floating
  - [x] Registered/Pending
  - [x] ***Lock Expired***
  - [x] ***Registered/Lock***
  - [x] ***Lock Expiration Warning***
  - [x] ***Delivery Expired***

- [ ] All Underwriting
  - [x] Underwriting Status

- [ ] All Table Funding/Wex
  - [ ] Suspended Files Over 30 Days - Not funded

- [ ] All Table Funding
  - [ ] Table Funding - Purchase Advice

- [ ] All Table Funding/Wex
  - [ ] Files Suspended for Funding - Not funded
  - [ ] Table Funding / Wex Request for Funds Received

- [ ] All Closed Loan
  - [x] File Received/Note Missing
  - [x] Files Suspended for Purchase - Not Funded
  - [x] Closed Loan Files Received for Purchase
  - [x] Note Received/File Missing
  - [x] ***Purchase Advice***
  - [x] Suspended Files Over 30 Days - Not funded

- [ ] All Post Funding
  - [x] Files Not Received on Funded Loans
  - [x] Suspense Items/Funded Loans
  - [x] Post Funding Adjustment Suspense Report
  - [x] Active Repurchase Detail

Save User

After creating the user and initiating their profile ("Save User") you will need to select the Report Manager Tab in order to give that individual access to the reporting functionality within the website

Put a check in the box for each report you wish for that user to have access to generate

Select the radio button "Yes" at the top to enable user access

Select Save User

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