## 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

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

- Operational Staff Targeted Access for Processing, Closing, Funding
- Sales Staff Basic access for Loan Officers and support staff

## TIPS:

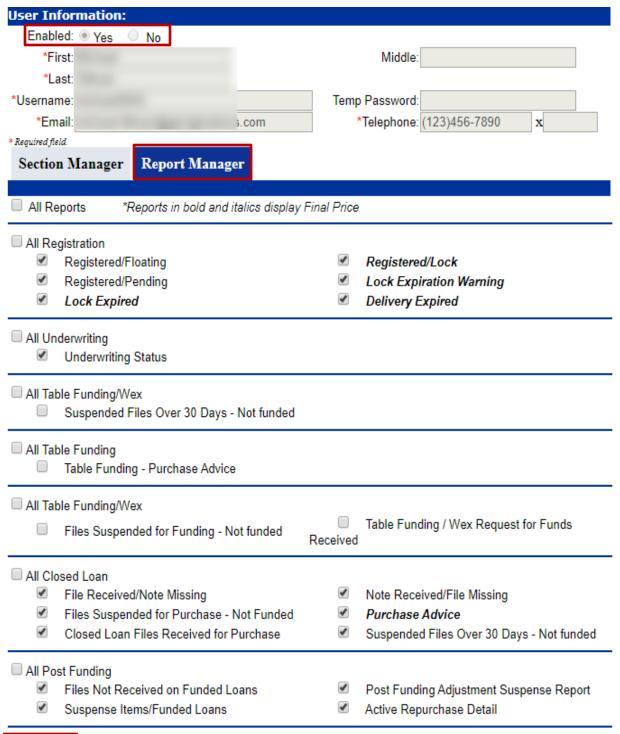
- --Make sure to complete all required information in the User Information Section also check the radio button for enabling user access
- --Always select Save User once the profile has been completed
- --You will need to email the individual user their assigned login and temp password once the account has been created
- \* Loan Status and Reports have the ability to view Pricing



## User Manager

User Information:		
Enabled: O Yes No	Middle:	
*Last:	Middle.	
	Toma Bassword	
*Username:	Temp Password:	
*Email:	*Telephone:	X
* Required field.		
Section Manager Report Manager		
INFORMATION CENTER		
Bulletins 1 2 3	☐ Client Guide 1 2 3	☐ Product Matrix
☐ Forms Library 1 2 3	Exclusionary List 1 2	
- Tomo Elbrary	- Exclusionary Eist	Olicite report our
TRAINING CENTER		
<ul> <li>Training Documents 1 2 3</li> </ul>	Web Based Training	2 3
IOR AIDO		
JOB AIDS  Job Aid Documents 1 2 3		
O JOD AID DOCUMENTS		
PIPELINE MANAGER	- *	
Ratesheet	Reports 💶 2 🗀	<ul> <li>Loan Status</li> </ul>
☐ Get Quote <b>①</b>	☐ Get Scenario	<ul> <li>Register Loan</li> </ul>
Lock Loan 1	☐ Lock Extension 1	Revise Loan
Revise Locked Loan	Cancel Loan      @	DO Case Files
Loan Conditions 1		
BULK SERVICES		
Bulk Import 1	☐ Commitments Report	
_ bulk import	- Communication (Coport	
IMAGE CENTRAL		
☐ Import Images	View Images/History	2)
ADDITIONAL SERVICES		
ADDITIONAL SERVICES  AU Services		
— AO OGIVICES		
SITE ADMINISTRAT <u>IO</u> N		
User Manager 1		
Pricing Authorization		
Disable Pricing Get Scenario 2 3		
Save User_		

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



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

