## 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

Enabled: Yes No   "First:	User Information:		
*Last:	Enabled: 🔿 Yes 🔎 No		
*Username *Email: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: *Telephone: * * * * * * * * * * * * *	*First:	Middle:	
*Email: *Telephone: X   Section Manager Report Manager   INFORMATION CENTER Client Guide 1 2 3 Product Matrix 1    Builetins 1 2 3 Client Guide 1 2 3 Client Report Card   Forms Library 1 2 3 Exclusionary List 1 2 3 Client Report Card   TRAINING CENTER 2 3 Veb Based Training 1 2 3   JOB AIDS Job Aid Documents 1 2 3   JOB AIDS Get Scenario 1   Reports 2 2* Loan Status 22   PIPELINE MANAGER Reports 2 2*   Ratesheet 1 Get Scenario 1   Lock Extension 1 Revise Loan 1   Lock Extension 1 Revise Loan 1   Loan Conditions 1 Cancel Loan 1 2   BULK SERVICES Commitments Report 1   IMAGE CENTRAL View Images/History 1 2   ADDITIONAL SERVICES View Images/History 1 2   AD Services SITE ADMINISTRATION   User Manager 1 3	*Last:		
Section Manager       Report Manager         INFORMATION CENTER       Client Guide 1 2 3 Product Matrix 1         Builetins 1 2 3       Exclusionary List 1 2 3 Client Report Card         TRAINING CENTER       2 3         Training Documents 1 2 3       Web Based Training 1 2 3         JOB AIDS       3         Job Aid Documents 1 2 3       Reports 1 2 3         PIPELINE MANAGER       Reports 1 2 3         Ratesheet 1       Reports 1 2 3         Lock Loan 1       Lock Extension 1         Revise Locked Loan 1       Cancel Loan 1         Loan Conditions 1       Cammitments Report 1         BULK SERVICES       View Images/History 1 2         Bulk Import 1       Commitments Report 1         IMAGE CENTRAL       View Images/History 1 2         ADDITIONAL SERVICES       View Images/History 1 2         AU Services       SITE ADMINISTRATION         User Manager 1       Pricing Authorization         Disable Pricing Get Scenario 2 3       3	*Username:	Temp Password:	
Section Manager       Report Manager         INFORMATION CENTER       Client Guide 1 2 3 Product Matrix 1         Bulletins 1 2 3       Exclusionary List 1 2 3 Client Report Card         TRAINING CENTER       2 3         Training Documents 1 2 3       Web Based Training 1 2 3         JOB AIDS       3         Job Aid Documents 1 2 3       Web Based Training 1 2 3         PIPELINE MANAGER       Reports 2 *         Ratesheet 1       Get Scenario 1         Lock Loan 1       Lock Extension 1         Revise Locked Loan 1       Cancel Loan 1 2         BULK SERVICES       Commitments Report 1         Bulk Import 1       Commitments Report 1         MAGE CENTRAL       Pricing Authorization         Import Images 1       2         SITE ADMINISTRATION       Yervices         SITE ADMINISTRATION       2 3	*Email:	*Telephone:	X
Bulletins 2   Forms Library 2   Forms Library 2   TRAINING CENTER   Training Documents 2   JOB AIDS   Job Aid Documents   1 2   2      PIPELINE MANAGER   Ratesheet   Ratesheet   Get Quote   Lock Loan   Lock Extension   1   2   BULK SERVICES   Bulk Import   1   Bulk Import   1   MAGE CENTRAL   1   1   1   1   2   2   2   1   1   2   2   2   1   1   2   2   2   2   3   2   3   3   2   3   3   3   3   3   4   3   4   3   4   4   4    5   5   4   4   5   5   4   5   5   5   5   5   6   4   5   5   6   4   5   6   6   6   7			
Forms Library       2       3       Exclusionary List       2       3       Client Report Card         TRAINING CENTER       Training Documents       2       3       Web Based Training       2       3         JOB AIDS       Job Aid Documents       2       3       Web Based Training       2       3         JOB AIDS       Job Aid Documents       2       3       PipeLiNE MANAGER       Reports       2       3         Ratesheet       1       2       3       2       3       2       3       2       3         PipeLiNE MANAGER       Get Quote       1       Get Scenario       1       2       3       2       3			
TRAINING CENTER Training Documents  Web Based Training  Constraining  Training  Training Documents  Constraining  Training Documents  Constraining  Training Documents  Constraining  Constr			
Training Documents 2   JOB AIDS   Job Aid Documents   1   2   3         PIPELINE MANAGER   Ratesheet   1   2   3         PIPELINE MANAGER   Ratesheet   1   2   3            PIPELINE MANAGER   Ratesheet   1   2   3            PIPELINE MANAGER   Ratesheet   1   2   3            PIPELINE MANAGER   Ratesheet   1   2   3            PIPELINE MANAGER   Revise Loan   1   Cock Extension   1   Cancel Loan   1   2    Bulk SERVICES   1   1   1   1   1   1   1   1   2   2   2   2   3         1   1   2   2   2   2   2   2   2   3         <	Forms Library 1 2 3	Exclusionary List 1 2	Client Report Card 1
Job Aid Documents 2   PIPELINE MANAGER Reports   Ratesheet Get Quote   Get Quote Get Scenario   Lock Loan Lock Extension   Loan Conditions Loan Conditions   BULK SERVICES   Bulk Import   Import Images   2   View Images/History   2   ADDITIONAL SERVICES   AU Services   SITE ADMINISTRATION    User Manager   Pricing Authorization	TRAINING CENTER  Training Documents 1 2 3	🗆 Web Based Training 🚺 🌗	2 3
Ratesheet   Get Quote   Lock Loan   Lock Loan   Lock Loan   Lock Loan   Revise Locked Loan   Cancel Loan   DO Case Files   DO Case Files     BULK SERVICES   Bulk Import   Images   2   View Images/History   2   SITE ADMINISTRATION    User Manager   Disable Pricing Get Scenario     2			
Get Quote Get Scenario   Lock Loan Lock Extension   Revise Locked Loan Lock Extension   Cancel Loan DO Case Files   DO Case Files DO Case Files     BULK SERVICES   Bulk Import   Images   2   View Images/History   2   SITE ADMINISTRATION   User Manager   Disable Pricing Get Scenario   3	PIPELINE MANAGER	*	*
Lock Loan Lock Extension   Revise Locked Loan Cancel Loan   Loan Conditions Cancel Loan   BULK SERVICES   Bulk Import   IMAGE CENTRAL   Import Images   2   View Images/History   2   SITE ADMINISTRATION   User Manager   Disable Pricing Get Scenario   Cancel Loan   2   Commitments Report   1   Pricing Authorization   1			
Revise Locked Loan Cancel Loan DO Case Files   Loan Conditions Commitments Report   BULK SERVICES   Bulk Import   IMAGE CENTRAL   Import Images   2   View Images/History   2   SITE ADMINISTRATION   User Manager   Pricing Authorization   3			
Loan Conditions   BULK SERVICES   Bulk Import   Bulk Import   IMAGE CENTRAL   Import Images   1   2   View Images/History   1   2      SITE ADMINISTRATION   User Manager   Pricing Authorization   O isable Pricing Get Scenario   2			
BULK SERVICES Bulk Import 1 Commitments Report 1 IMAGE CENTRAL Import Images 1 2 View Images/History 1 2 ADDITIONAL SERVICES AU Services SITE ADMINISTRATION User Manager 1 Pricing Authorization Disable Pricing Get Scenario 2 3		🗆 Cancel Loan 💶 🛃	DO Case Files 1
Bulk Import     Commitments Report	BULKSERVICES		
<ul> <li>Import Images 1 2 View Images/History 1 2</li> <li>ADDITIONAL SERVICES         <ul> <li>AU Services</li> </ul> </li> <li>SITE ADMINISTRATION         <ul> <li>User Manager 1</li> <li>Pricing Authorization</li> <li>Disable Pricing Get Scenario 2 3</li> </ul> </li> </ul>		Commitments Report 1	
AU Services SITE ADMINISTRATION     User Manager     Pricing Authorization     Disable Pricing Get Scenario 2 3		View Images/History 1	2
User Manager 1 Pricing Authorization Disable Pricing Get Scenario 2 3			
Disable Pricing Get Scenario 2 3	User Manager 1		
	_		
Sava Usar	Disable Pricing Get Scenario 2 3		
Save user	Save User_		

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

User Information:	
Enabled: • Yes No *First: *Last:	Middle:
*Username:	Temp Password:
*Email:	*Telephone: (123)456-7890 x
* Required field.	
Section Manager Report Manager	
All Reports *Reports in bold and italics display F	Final Price
<ul> <li>All Registration</li> <li>Registered/Floating</li> <li>Registered/Pending</li> <li>Lock Expired</li> </ul>	<ul> <li>Registered/Lock</li> <li>Lock Expiration Warning</li> <li>Delivery Expired</li> </ul>
<ul> <li>All Underwriting</li> <li>Underwriting Status</li> </ul>	
<ul> <li>All Table Funding/Wex</li> <li>Suspended Files Over 30 Days - Not funded</li> </ul>	
<ul> <li>All Table Funding</li> <li>Table Funding - Purchase Advice</li> </ul>	
<ul> <li>All Table Funding/Wex</li> <li>Files Suspended for Funding - Not funded</li> </ul>	Table Funding / Wex Request for Funds Received
All Closed Loan	
File Received/Note Missing	Note Received/File Missing
Files Suspended for Purchase - Not Funded	Purchase Advice
Closed Loan Files Received for Purchase	Suspended Files Over 30 Days - Not funded
All Post Funding	
<ul> <li>Files Not Received on Funded Loans</li> </ul>	Post Funding Adjustment Suspense Report
Suspense Items/Funded Loans	Active Repurchase Detail

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

