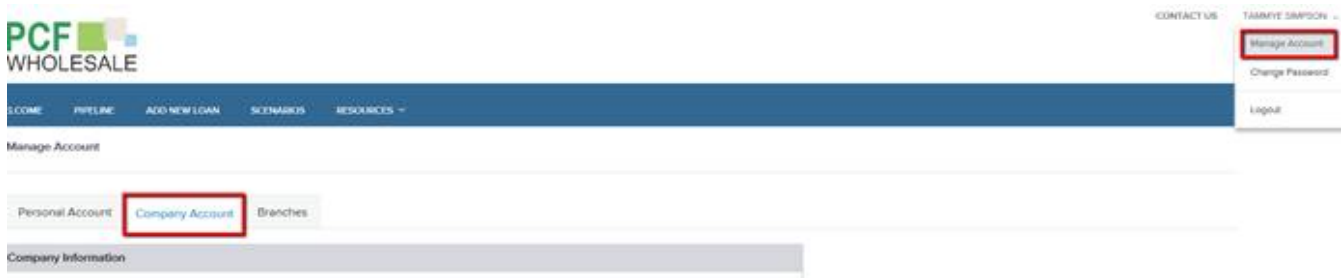
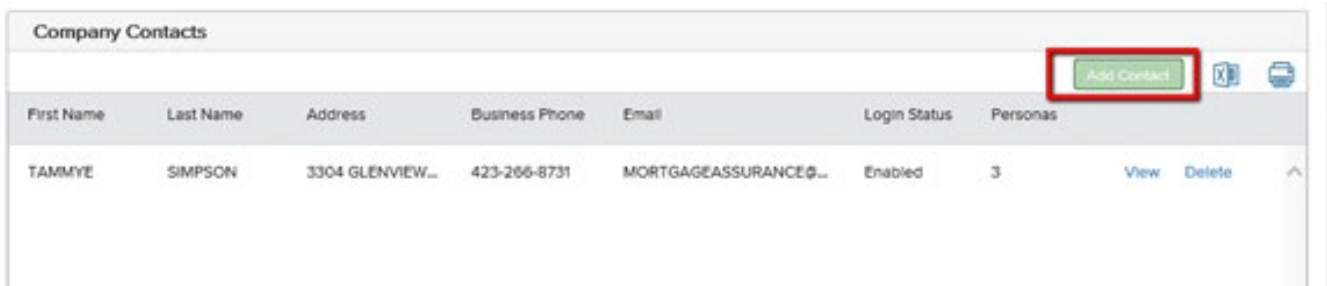


How to Add Users & Roles in LoanConnect

1. Once logged in, click on the user name then manage accounts
2. Click on company



3. Scroll down to company contacts
4. Click add contacts



5. Fill the required information and click save

*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

*Personas

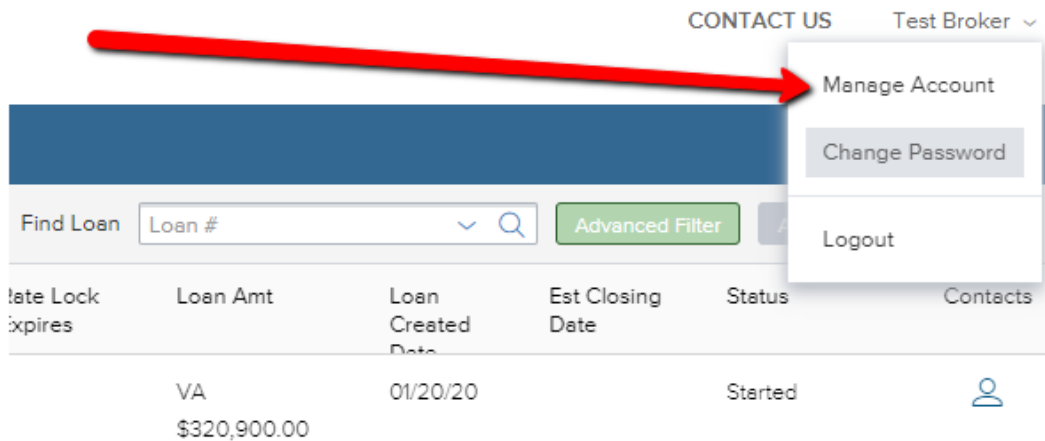
View access to team's loans

Edit team's loans

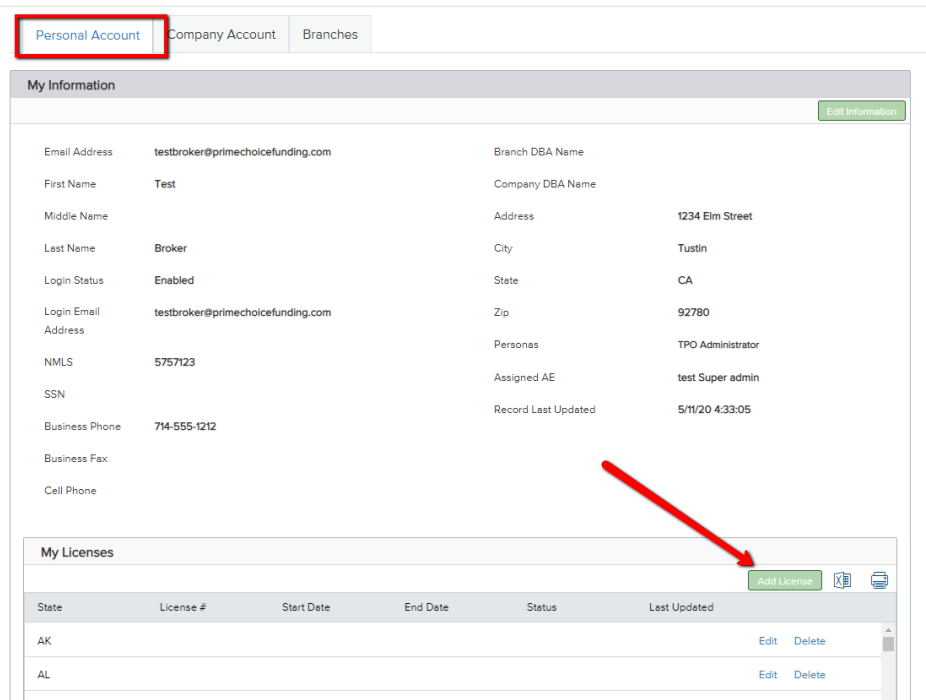
How to Add State Licenses in LoanConnect

After you have added a company contact, i.e. Broker, LO or processor, it is IMPORTANT to then go to the “Licensing” section for that contact and enter in their state specific licensing information. If you do not complete this step, the LO will not be able to submit a loan as an error message will be given that the originator is not licensed in the state that the property is located in.

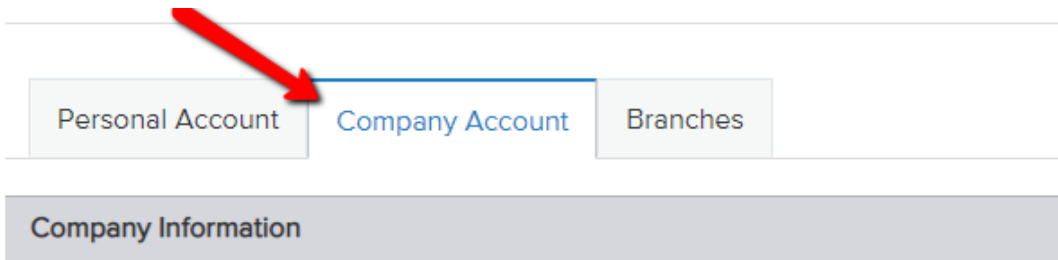
The first step is to click on “Manage Account”



To add licensing for the Admin on the account, go to the “Personal Account” tab, scroll to the bottom to “My Licenses” and click on the green tab “add licenses”.



For LO licensing, click on the “Company Account” tab.



Scroll down to the bottom half of the page to “Company Contacts”. Go to the LO you are adding licensing info for and click on “View”.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
Join	PCF	1234 Elm Street		partner@pcfwholesale.com	Enabled	2	View Delete
Test	Broker	1234 Elm Street	714-555-1212	testbroker@primechoicefun...	Enabled	1	View Delete

The window below will open...

- Please be sure to list the individual, state specific, license number for the state you are adding.
- Issue Date can be 12/31/2019 if you do not remember your original licensing date.
- Start Date can be 01/01/2020
- End date should be 12/31/2020 or later
- Status should be Approved Conditional
- State that you are licensed in for this license number
- After all fields have been completed click the green “Save” button.

Create License Record

* License #

* Issue Date

* Start Date

* End Date

* Status

* License State

Cancel Save

You will need to complete this process for each state you or the LO are licensed in. If you try to submit a loan without completing this information the system will give you an error message and will not allow you to submit your file.