

Account Management

Security Profiles

The Web Portal has 4 security profiles that can be assigned to a user. A user can be assigned more than one security profile.

- **Loan Officer:** For users who are licensed loan officers. This user must have at least one valid state license.
- **Loan Officer Assistant:** For users who will be assisting a loan officer.
- **Loan Processor:** For users who will be processing a loan file.
- **Broker / Admin Manager:** For users who will be responsible for creating and managing user accounts for their organization.

Creating a New User

If you are not an administrator, please contact your organization’s account administrator about creating a new user account.

To create a new user account for your organization, click “Account Manage” at the top right. You will be redirected to the account management page, where you can find your organization’s information and a list of all user accounts in your organization.



Hello, demo.account [Log off](#) [Change Profile](#) [Account Manage](#)

Pipeline [New File](#) [Pricing Engine](#) [Rate](#) [Forms](#) [Appraisal](#)

[0 All](#) [0 Lead & Registered](#) [1 Registered](#) [0 Approval & Condition](#) [0 Lock](#) [4 Doc & Funding](#) [5 Closed](#) [Standard](#)

Click the “New User” button to be taken to the account creation page.

Profile

Company Name	Test Broker				
Address	2650 E. Imperial Hwy Suite 110 Brea CA 92821				
Phone	(909) 111-2222	Fax	(909) 333-4444		
Compensation Plan	Code	Start	End	TPOLoanBPS	TPOFlatFee
	BComPlan2750	6/25/2024	7/31/2024	2.750	0.00
	BComPlan3125	8/1/2024	7/31/2025	3.125	0.00

New User **Reload**

ID	Name	Title	Email
demo account	Demo Account		daniel.park@wmbankers.com
test account	test account		test@wmbankers.com
test.kim	Test Kim	Owner2	sean.park3@wmbankers.com
test.kim3	Test Kim3		test3@wmbankers.com

Fill out the required fields and click “Save General Info” to create the account.

General Info

Profile *	<input type="text"/>		
NMLS ID	<input type="text"/>		
First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Email *	<input type="text"/>		
Title	<input type="text"/>		
Mobile Phone *	<input type="text"/>	Work Phone	<input type="text"/>
Start Date	<input type="text" value="mm/dd/yyyy"/>	Terminate Date	<input type="text" value="mm/dd/yyyy"/>

Save General Info * is required field

Back to Account Manage



WHOLESALE MORTGAGE BANKERS

2650 E. Imperial Hwy., Suite 110, Brea, CA 92821
(714) 482-6570
info@wmbankers.com

Managing Existing Users

To manage existing users for your organization, click on the username of the account you are trying to modify. You will see a section for general information about the account, as well as any state licenses and roles associated with it.

Profile

Company Name	Test Broker				
Address	2650 E. Imperial Hwy Suite 110 Brea CA 92821				
Phone	(909) 111-2222	Fax	(909) 333-4444		
Compensation Plan	Code	Start	End	TPOLoanBPS	TPOFlatFee
	BComPlan2750	6/25/2024	7/31/2024	2.750	0.00
	BComPlan3125	8/1/2024	7/31/2025	3.125	0.00

[New User](#) [Reload](#)

ID	Name	Title	Email
demo account	Demo Account		daniel.park@wmbankers.com
test account	test account		test@wmbankers.com
test.kim	Test Kim	Owner2	sean.park3@wmbankers.com
test.kim3	Test Kim3		test3@wmbankers.com

To reset an account's password, click the "Reset Password" button inside the general information section. Confirm again that you want to reset the password. A reset email will be sent to the email address associated with the account.

To update information in the general section, click on any of the shown fields and input your changes. Click "Save General Info" to apply your changes.

General Info

User ID	test.account	Reset Password	NMLS ID	1231456
First Name *	test	Last Name *	account	
Email *	test@wmbankers.com			
Title				
Mobile Phone *	(123) 456-7890	Work Phone		
Start Date	mm/dd/yyyy	Terminate Date	mm/dd/yyyy	

State License

[New](#)

State	License No	Started	Expires
CA	1236781549	8/14/2024	10/14/2025

Profile

[New](#)

User ID	Profile	
test.account	Loan Officer	Delete

[Save General Info](#) * is required field

[Back to Account Manage](#)

To add a new state license, click “New” at the top of the section. Fill out the fields shown to you and click “Save” to apply your changes. To modify an existing license, click on the license and make your desired changes. Confirm and apply your changes by clicking “Save”.

State License

State:	<input type="text"/>
License No	<input type="text"/>
Start Date	<input type="text" value="mm/dd/yyyy"/>
Expiration Date	<input type="text" value="mm/dd/yyyy"/>

Save **Close**

To add a new role, click “New” at the top of the section. Select the role you want to add and click “Save” to confirm the addition of the new role. Existing roles can be removed from the account by clicking the “Delete” button next to the role.

Profile

User:	test.account
Profile:	<input type="text"/>

Save **Close**