



Lakeview

Correspondent Non-Delegated Lender Reference Guide

Non-Del Portal Admin Tasks





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1. Overview

The person designated as the Portal Administrator has administrative access to the Correspondent Non-Delegated Portal.

As the Portal Admin, they can:

- [Create new users](#)
- [View user list](#)
- [Update user permissions](#)

Important Notes!

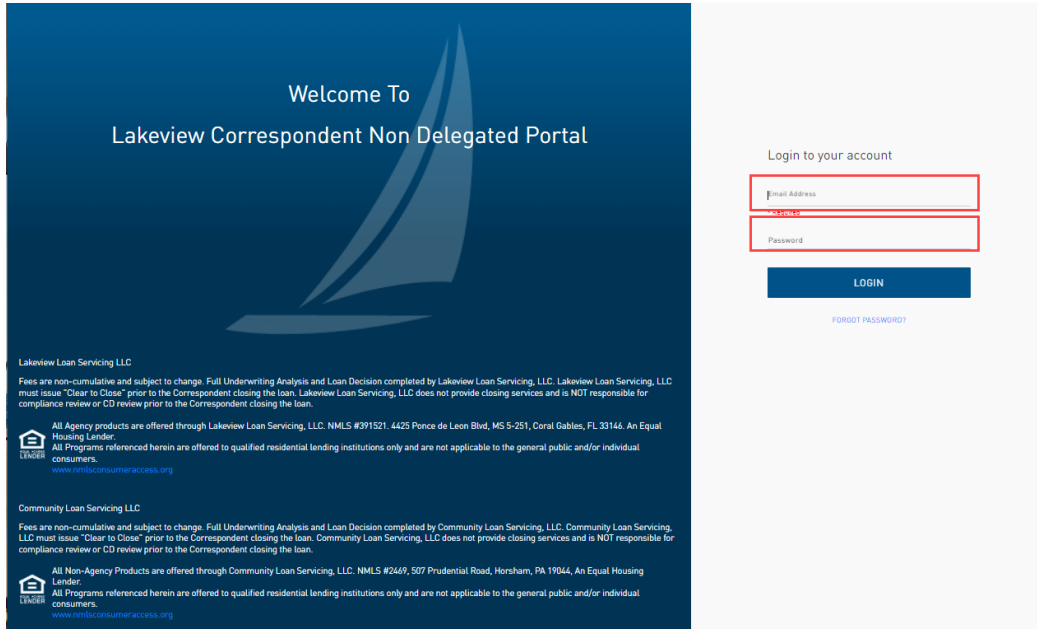
- The Portal Admin cannot reset a user's password; only the user can reset their password.
- The system does not store user passwords. Each user is responsible for setting and remembering their password.

2. Access the Correspondent Non-Delegated Portal

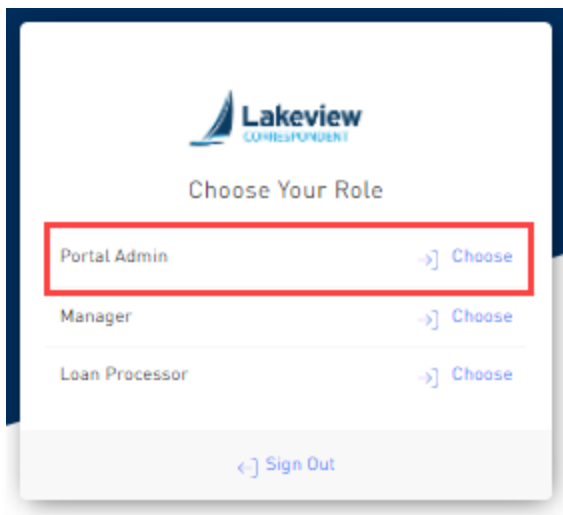
1. Open <https://nondelegated.lakeviewcorrespondent.com/#/login> in your internet browser.

Note: Chrome browser is preferred.

2. Enter your email address and password in the text fields and click **LOGIN**.



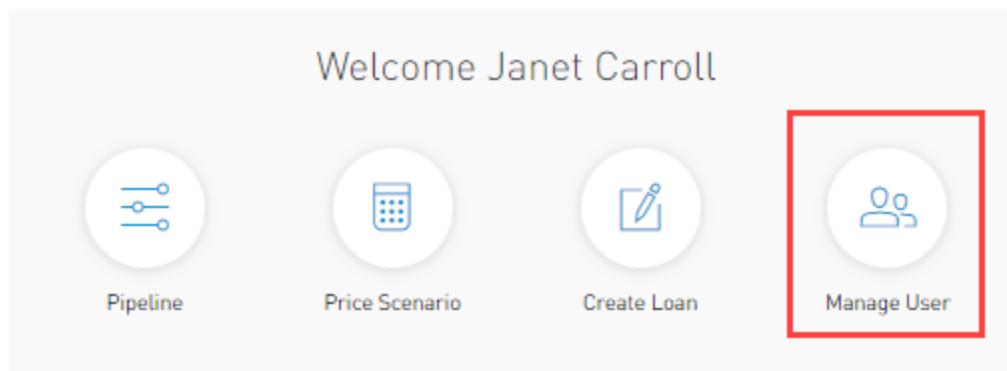
3. If prompted to **Choose Your Role**, click **Portal Admin**.



Outcome: The Welcome page displays.

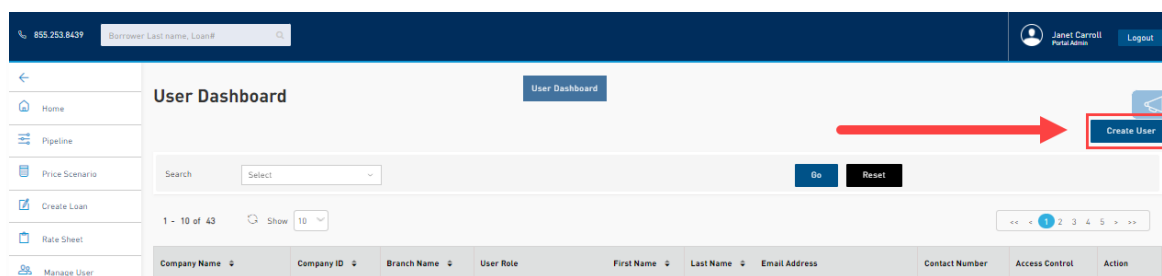
3. Create New User.

1. Click **Manage User**.



Outcome: The User Dashboard page displays.

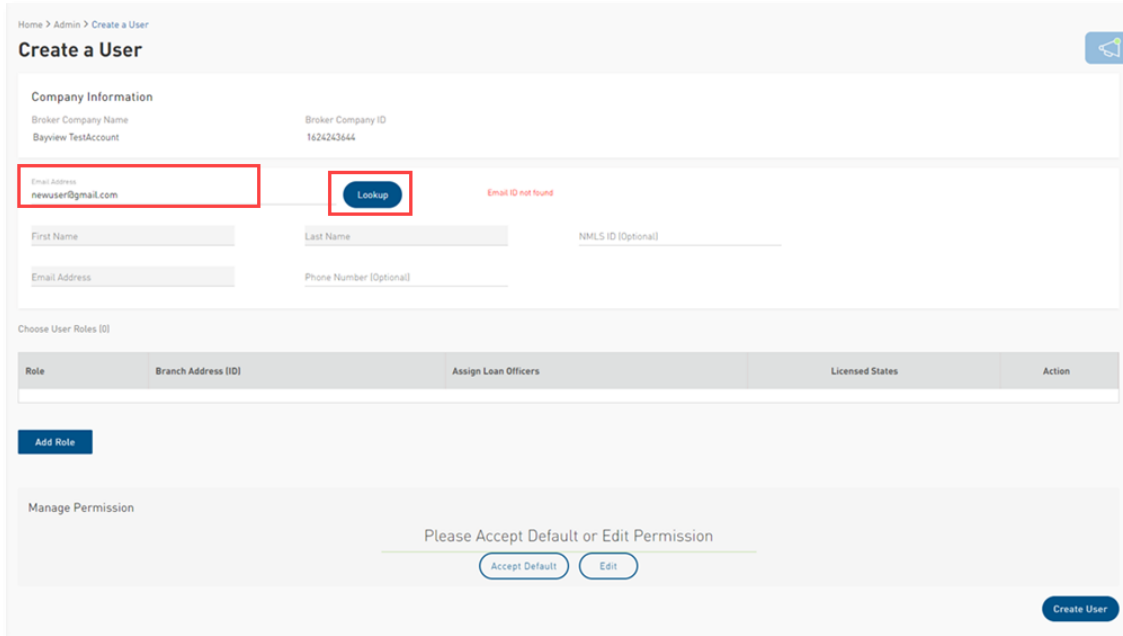
2. Click **Create User** from the **User Dashboard**.



Outcome: The **Create a User** page displays.

3. Create New User, continued

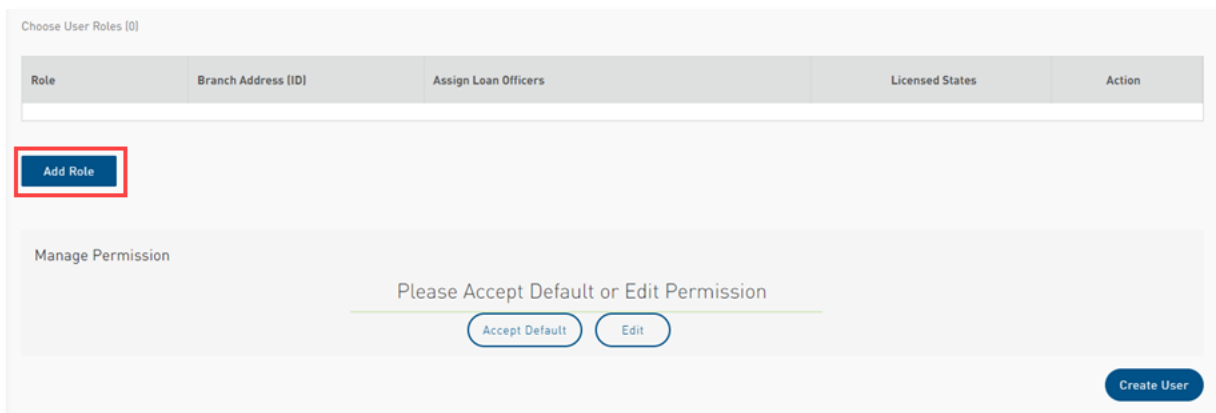
3. Enter the **Email Address** of the new user.
4. Click Lookup.



Outcome: The user's information populates using information retrieved from Encompass.

Note: If the email address lookup fails, an error message, **Email ID not found**, displays. Manually complete the user information.

5. Once the user information has populated, click **Add Role**.




3. Create New User, continued

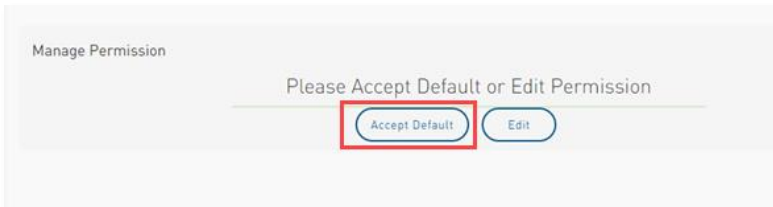
6. Select the appropriate **Role** from the drop-down list.



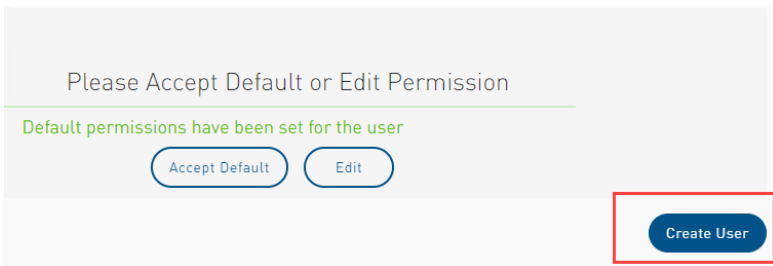
7. Select the appropriate **Branch** from the drop-down list.



8. Click **Accept Default**.



9. Click **Create User**.



4. View User List

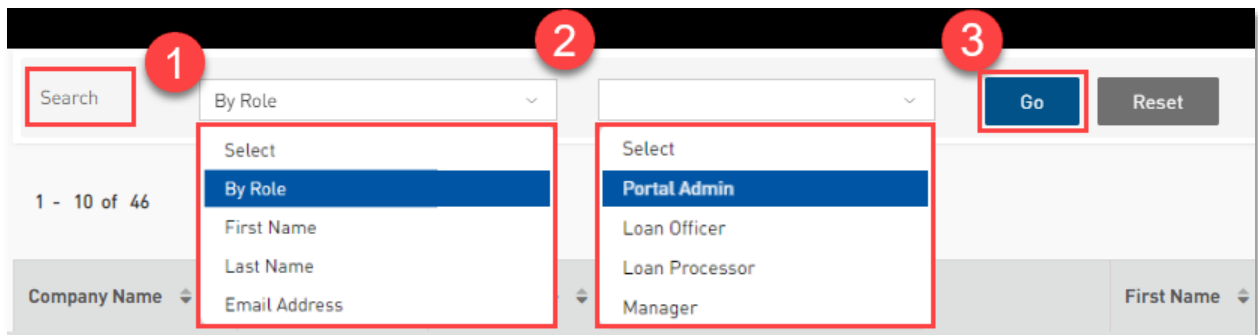
A Portal Admin can view the number of users enrolled from the User Dashboard. The dashboard displays the following information for all users.

- Company Name
- Company ID
- Branch Name
- User Role(s)
- First Name
- Last Name
- Email Address
- Contact Number
- Access Control
- Action

Search Options

To limit the list of users, use the Search feature on the **User Dashboard**.

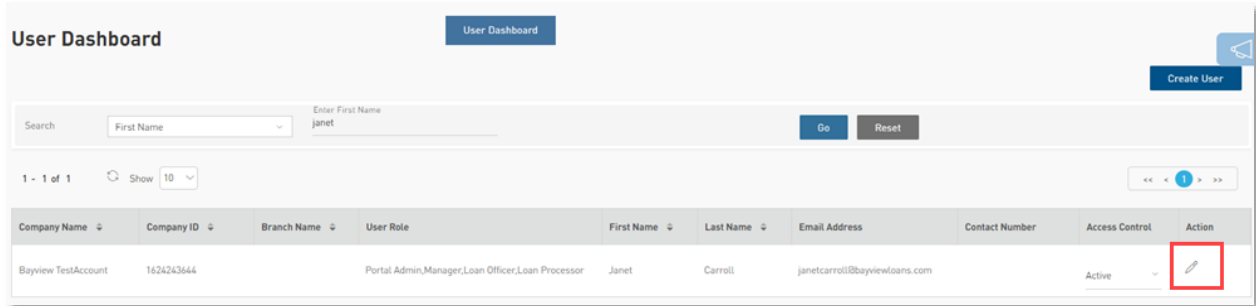
1. Select the appropriate category from the drop-down list.
2. Select the appropriate option or enter the specifics for the category selected to search by.
3. Click **Go**.



5. Edit User

Select User to Edit


1. From the **User Dashboard**, click the edit icon for the user you wish to edit.



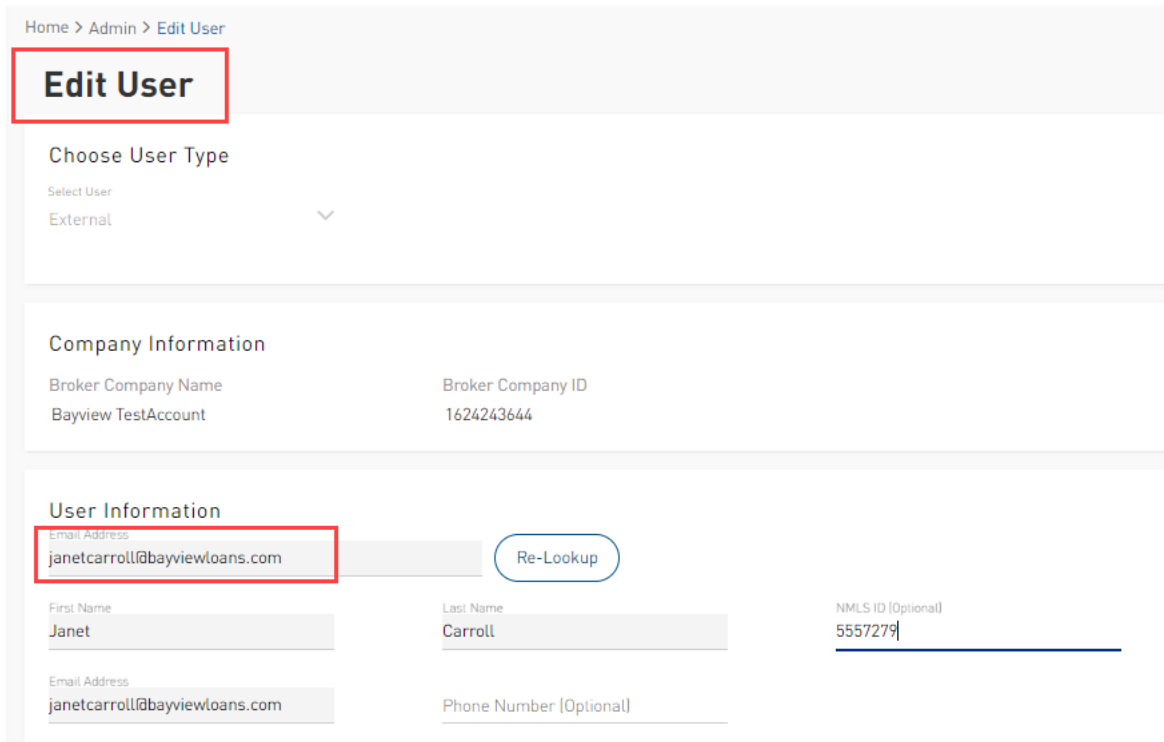
User Dashboard

Search: Enter First Name:

1 - 1 of 1 Show 10

Company Name	Company ID	Branch Name	User Role	First Name	Last Name	Email Address	Contact Number	Access Control	Action
Bayview TestAccount	1624243644		Portal Admin,Manager,Loan Officer,Loan Processor	Janet	Carroll	janetcarroll@bayviewloans.com		Active	

Outcome: The **Edit User** page displays.



Home > Admin > Edit User

Edit User

Choose User Type
Select User
External

Company Information
Broker Company Name: Bayview TestAccount
Broker Company ID: 1624243644

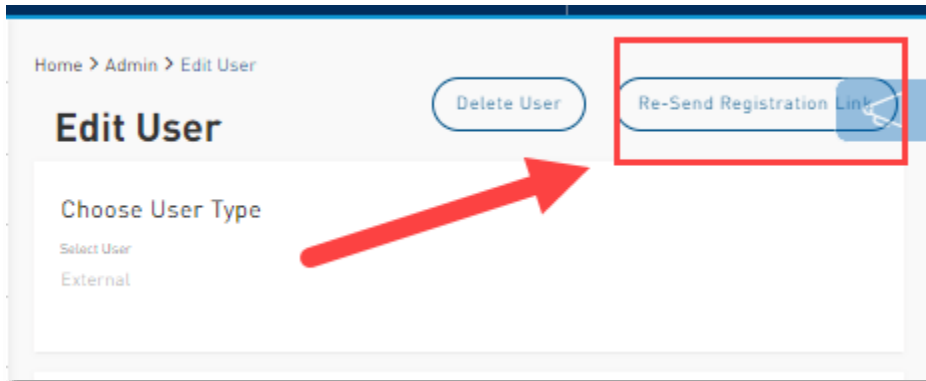
User Information
Email Address:
First Name: Last Name: NMLS ID [Optional]:
Email Address: Phone Number [Optional]:

5. Edit User, continued

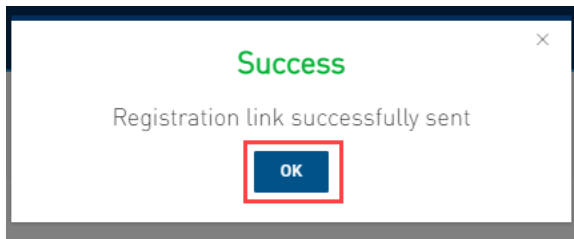
Re-Send Registration

If a registered user reports they are unable to access the Lakeview Correspondent Non Delegated Portal, the Portal Admin can re-send the registration link.

1. On the **Edit User** page, click **Re-Send Registration Link**.



2. A confirmation dialogue box displays. Click **OK**.

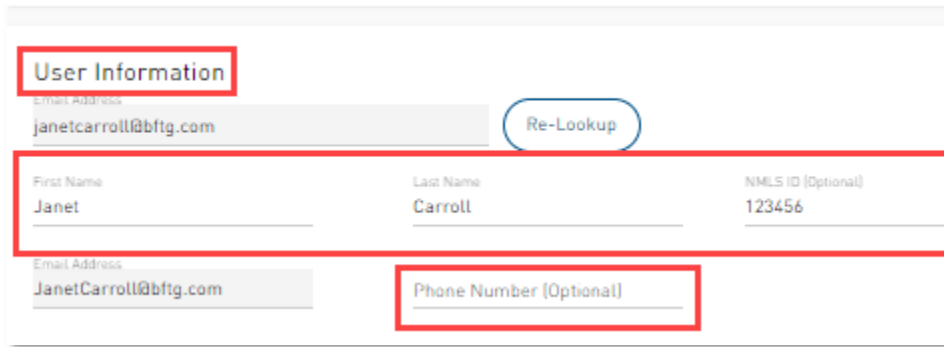


5. Edit User, continued

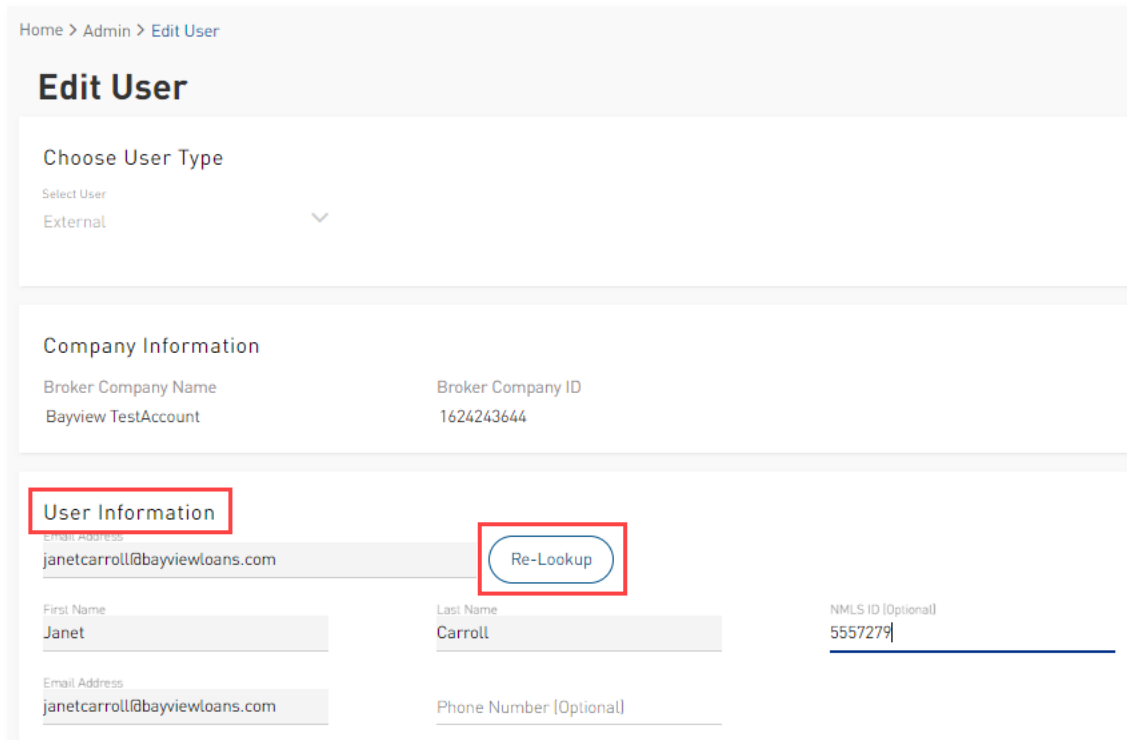
Update User Information

Note: The **Email Address** for the user is not editable under **User Information**

1. In the **User Information** section, make the necessary edits.



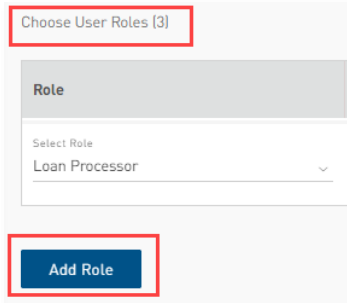
2. Once the edits are complete, click **Re-Lookup** to update the user's information.



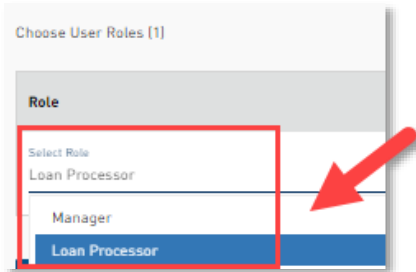
5. Edit User, continued

Add Role

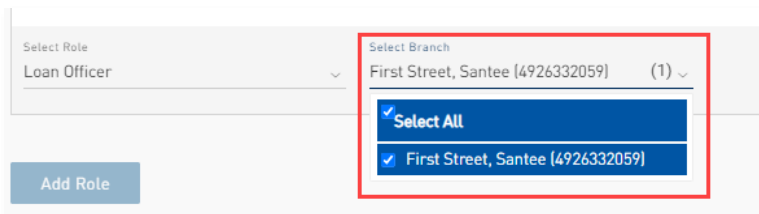
1. In the Choose User Roles section, click Add Role.



2. Select a role from the drop-down list.

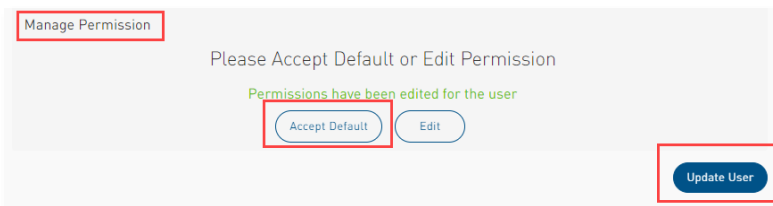


3. Select a branch from the drop-down list.



4. In the **Manage Permission** section, click **Accept Default**.

5. Click **Update User**.





5. Edit User, continued

Remove a Role

1. In the **Choose User Roles** section, click the trash can icon at the end of the row.

Choose User Roles (3)

Role	Branch Address (ID)	Licensed States	Action
Select Role Loan Processor	Select Branch (1) ▾	0	
Select Role Manager	Select Branch		
Select Role Portal Admin	Select Branch (1) ▾	0	

2. Click **Update User**.

Choose User Roles (3)

Role	Branch Address (ID)	Assign Loan Officers	Licensed States	Action
Select Role Portal Admin	Select Branch First Street, Santee (4926332059) (1) ▾		4	
Select Role Manager	Select Branch First Street, Santee (4926332059) (1) ▾		4	
Select Role Loan Processor	Select Branch First Street, Santee (4926332059) (1) ▾	Select LO Beata Benavides, Beth Farrell, Chris Renner, David O(7) ▾	4	

Add Role

Manage Permission

Please Accept Default or Edit Permission

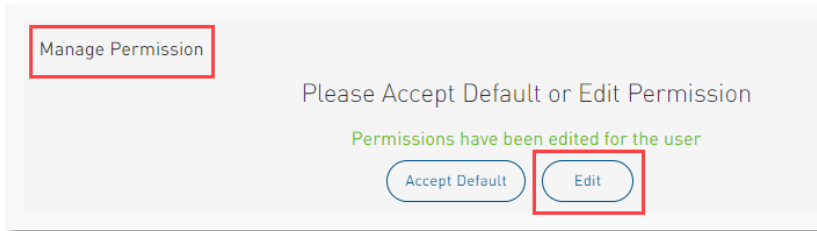
Permissions have been edited for the user



5. Edit User, continued

Manage Permission

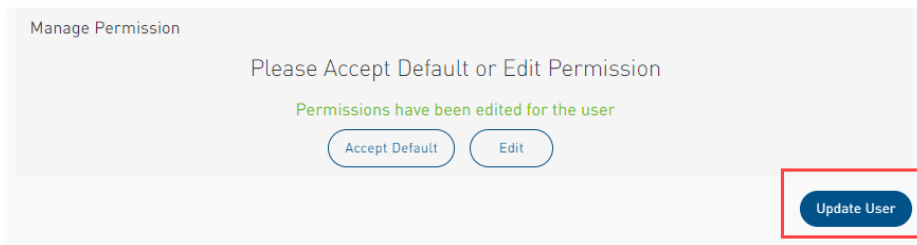
1. In the **Manage Permission** section, click **Edit**.



2. Check or clear appropriate checkboxes to grant/revoke permissions.

Features	Edit	View Only
Create Loan	<input checked="" type="checkbox"/>	
Manual New Urla	<input checked="" type="checkbox"/>	
Import 3.4	<input checked="" type="checkbox"/>	
Export FNM		<input type="checkbox"/>
Pipeline		<input checked="" type="checkbox"/>
Active Pipeline		<input checked="" type="checkbox"/>
Funded Pipeline		<input checked="" type="checkbox"/>
Cancelled/Declined Pipeline		<input checked="" type="checkbox"/>
1003 New-Urla	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1003 Sub Menus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New Urla Loan Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product & Pricing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Price Scenario	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Click **Update User**.

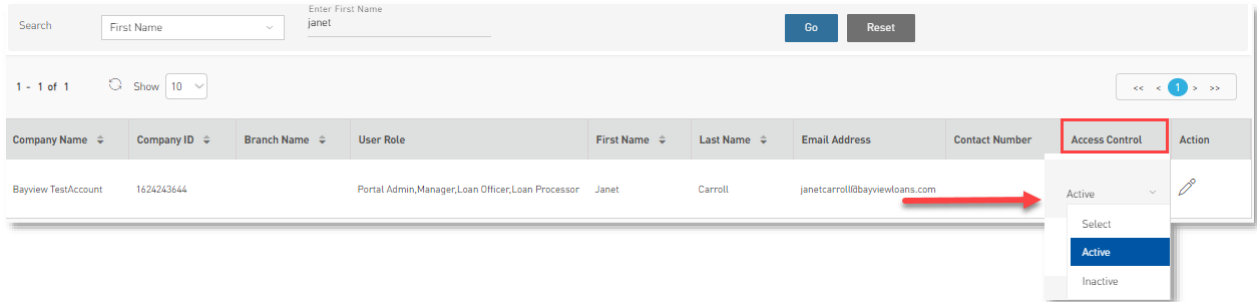


5. Edit User, continued

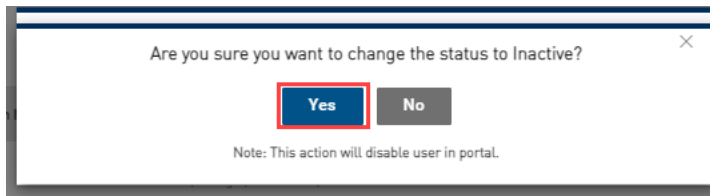
Access Control

A Portal Admin can change a user's status to **Active/Inactive** by selecting an option from the **Access Control** drop-down list.

1. Navigate to the user.
2. In the **Access Control** column, select the appropriate access for the user.

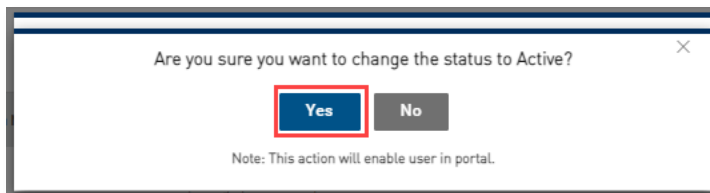


3. If making the user **Inactive**, a dialogue box displays to confirm. Select **Yes**.



Outcome: Changing the user status to **Inactive** disables the user in the portal.

4. If making the user **Active**, a dialogue box displays to confirm. Select **Yes**.



Outcome: This enables the user in the portal.