



Lakeview

Correspondent 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.

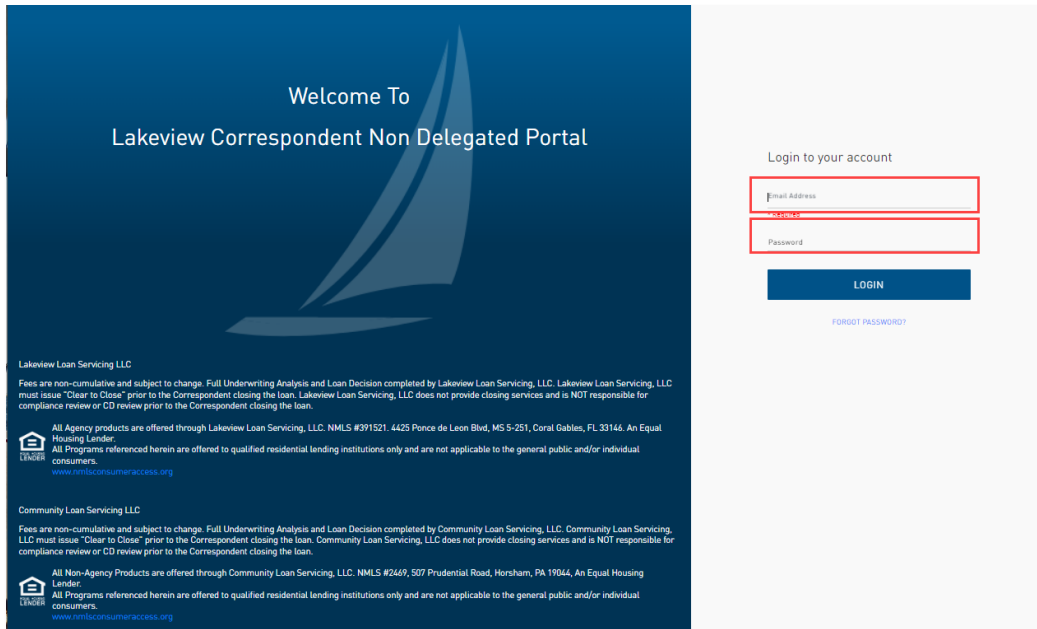


2. Access the Correspondent Non-Delegated Portal

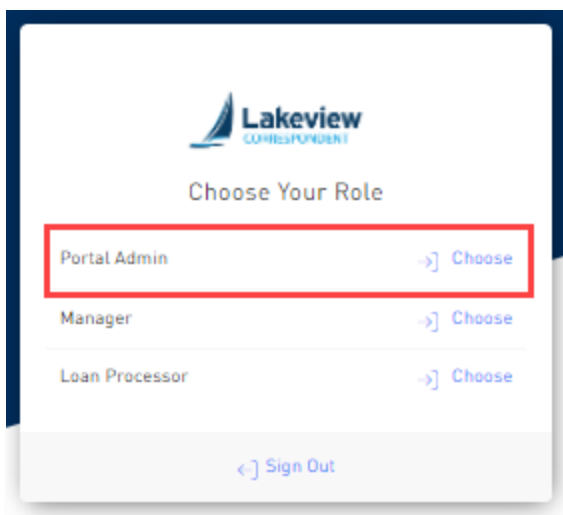
1. Open <https://nondelegated.lakeviewcorrespondent.com/#/login> in your internet browser.

Note: Chrome browser is preferred.

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



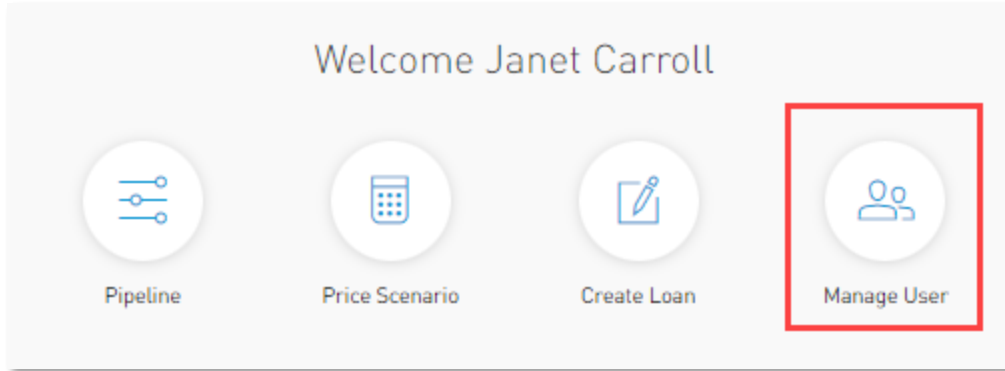
3. If prompted to **Choose Your Role**, click **Portal Admin**.



Outcome: The Welcome page displays.

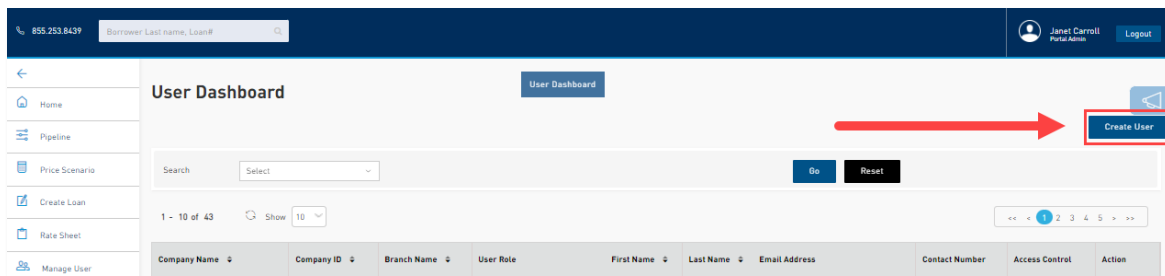
3. Create New User.

1. Click **Manage User**.



Outcome: The User Dashboard page displays.

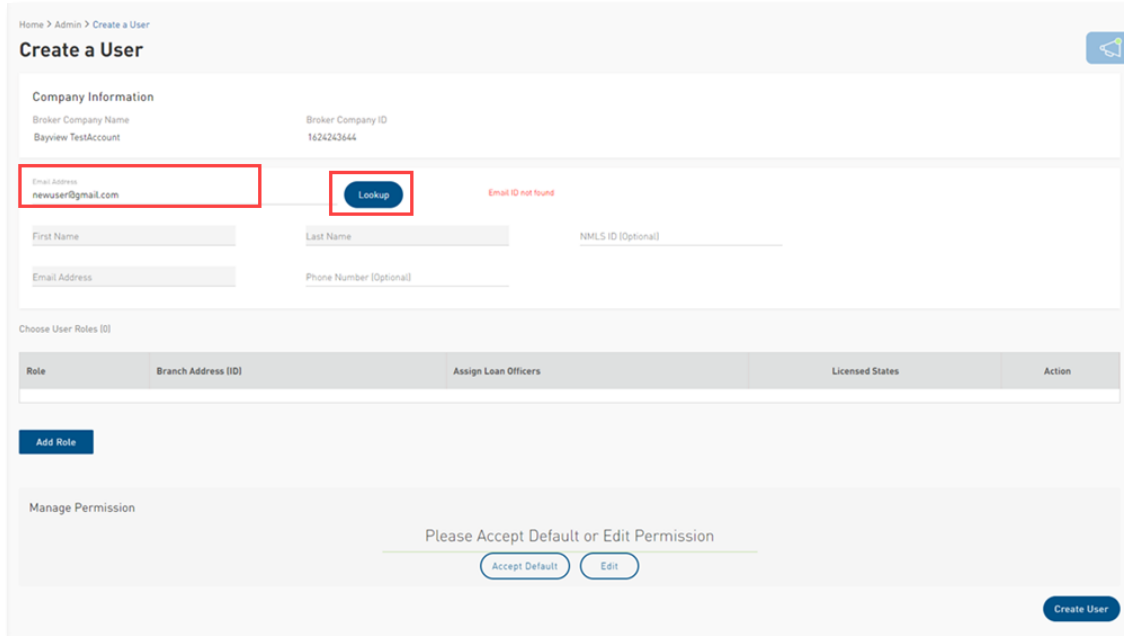
2. Click **Create User** from the **User Dashboard**.



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

3. Create New User, continued

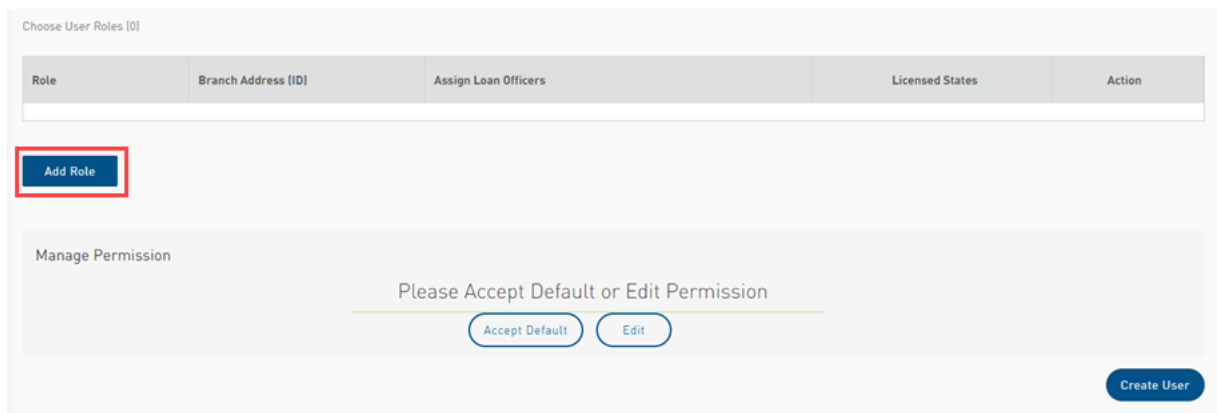
3. Enter the **Email Address** of the new user.
4. Click Lookup.



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

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

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



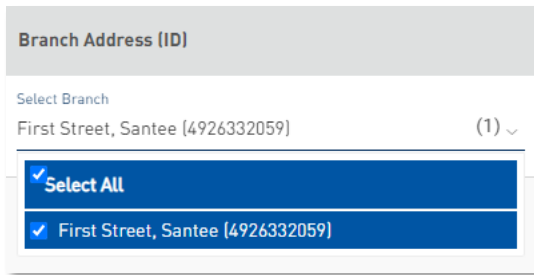
3. Create New User, continued

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



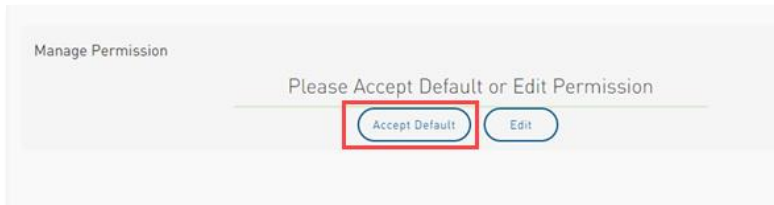
A screenshot of a web form titled "Role". Below the title is a dropdown menu with the text "Select Role" and a downward arrow. The dropdown is open, showing two options: "Manager" and "Loan Processor". A red rectangular box highlights the entire dropdown menu area.

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



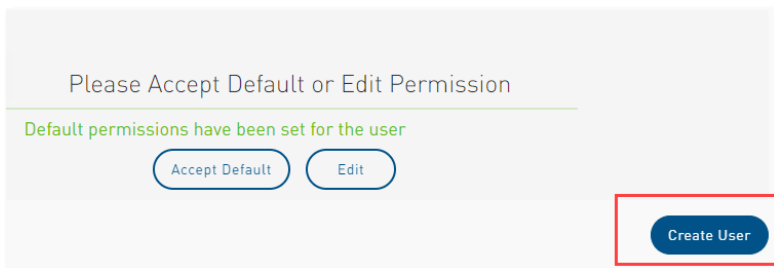
A screenshot of a web form titled "Branch Address (ID)". Below the title is a dropdown menu with the text "Select Branch" and a downward arrow. The dropdown is open, showing one option: "First Street, Santee (4926332059)". Below the dropdown is a blue bar with a checkmark and the text "Select All". Below that is another blue bar with a checkmark and the text "First Street, Santee (4926332059)".

8. Click **Accept Default**.



A screenshot of a dialog box titled "Manage Permission". The text inside says "Please Accept Default or Edit Permission". Below the text are two buttons: "Accept Default" and "Edit". A red rectangular box highlights the "Accept Default" button.

9. Click **Create User**.



A screenshot of a dialog box titled "Manage Permission". The text inside says "Please Accept Default or Edit Permission". Below the text is a green message: "Default permissions have been set for the user". Below the message are two buttons: "Accept Default" and "Edit". At the bottom right of the dialog is a blue button labeled "Create User". A red rectangular box highlights the "Create User" button.

4. View User List

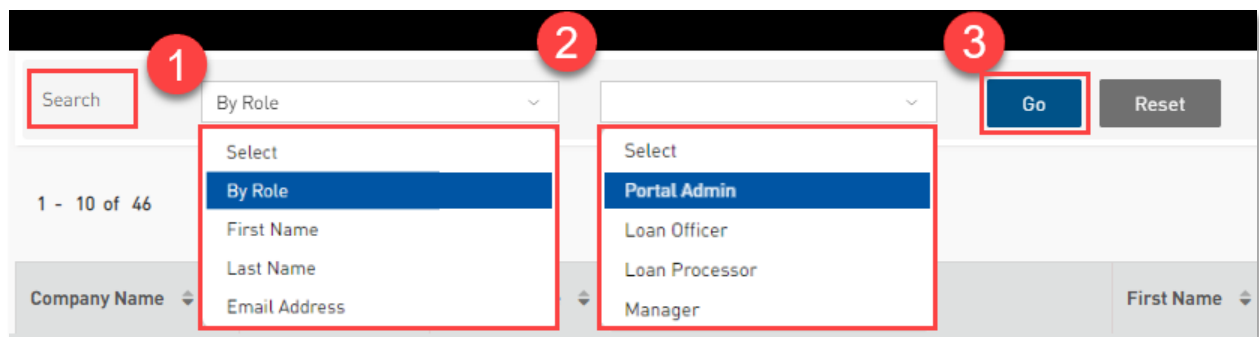
A Portal Admin can view the number of users enrolled from the User Dashboard. The dashboard displays the following information for all users.

- 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**.

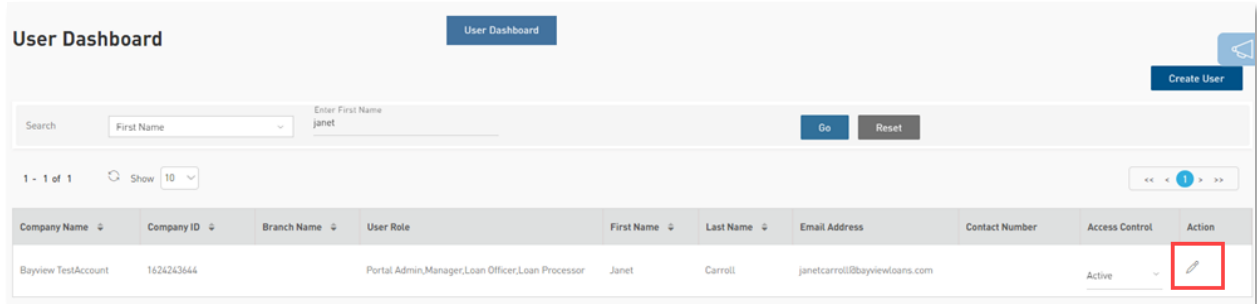
1. Select the appropriate category from the drop-down list.
2. Select the appropriate option or enter the specifics for the category selected to search by.
3. Click **Go**.



5. Edit User

Select User to Edit


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



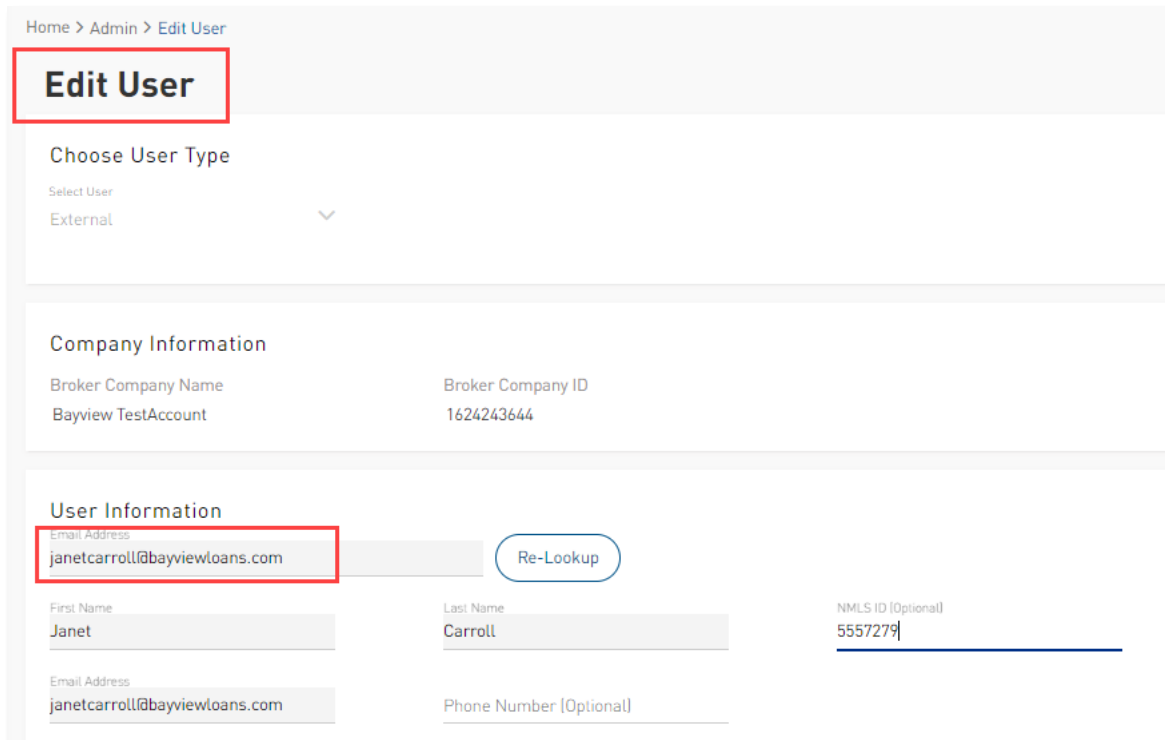
User Dashboard

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]:

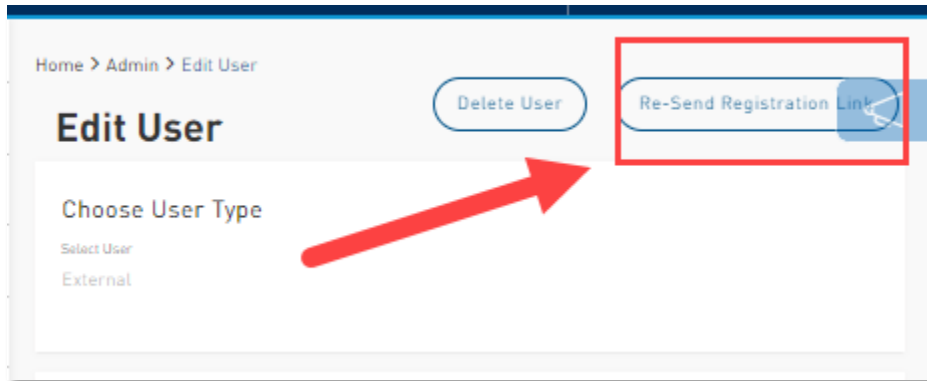
Email Address: Phone Number [Optional]:

5. Edit User, continued

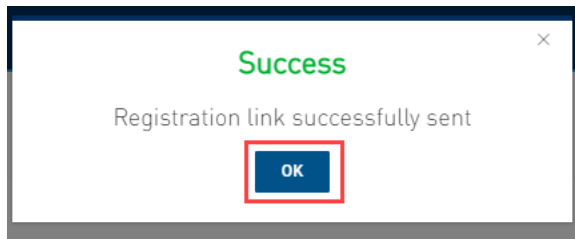
Re-Send Registration

If a registered user reports they cannot 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**.

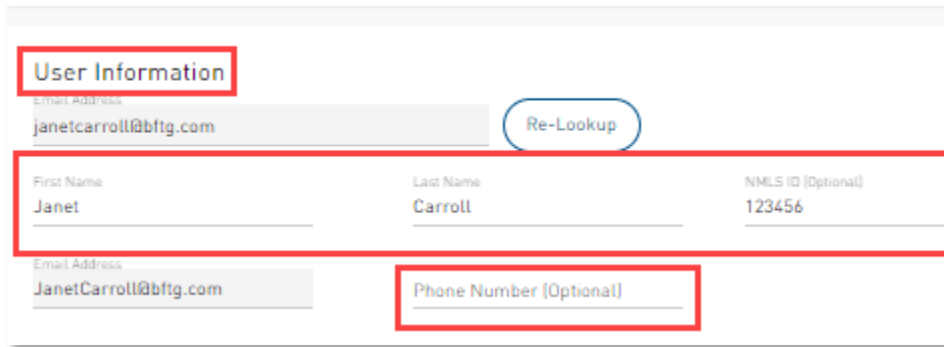


5. Edit User, continued

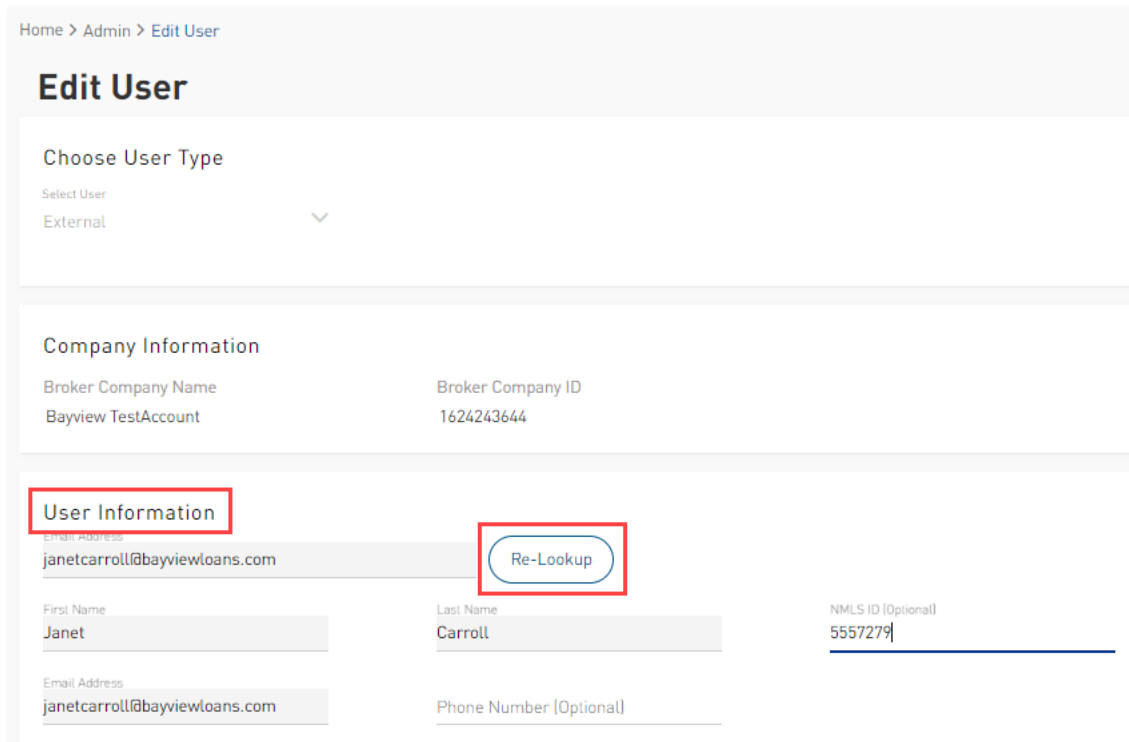
Update User Information

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

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



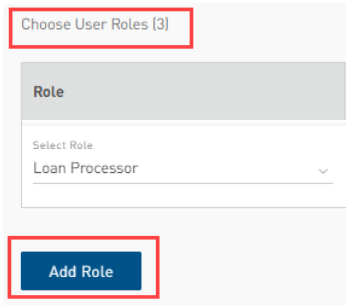
2. Once the edits are complete, click **Re-Lookup** to update the user's information.



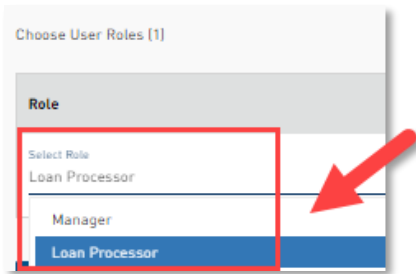
5. Edit User, continued

Add Role

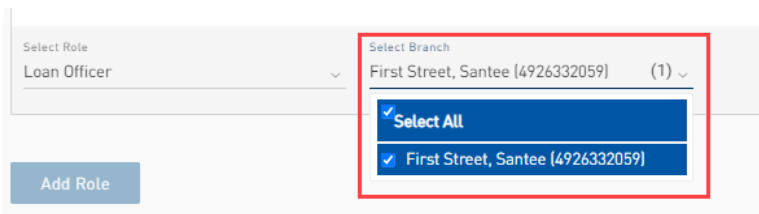
1. In the Choose User Roles section, click Add Role.



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

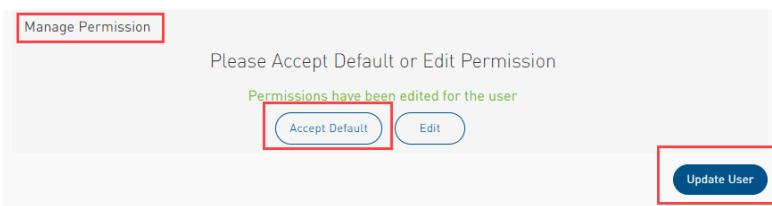


3. Select a branch from the drop-down list.



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

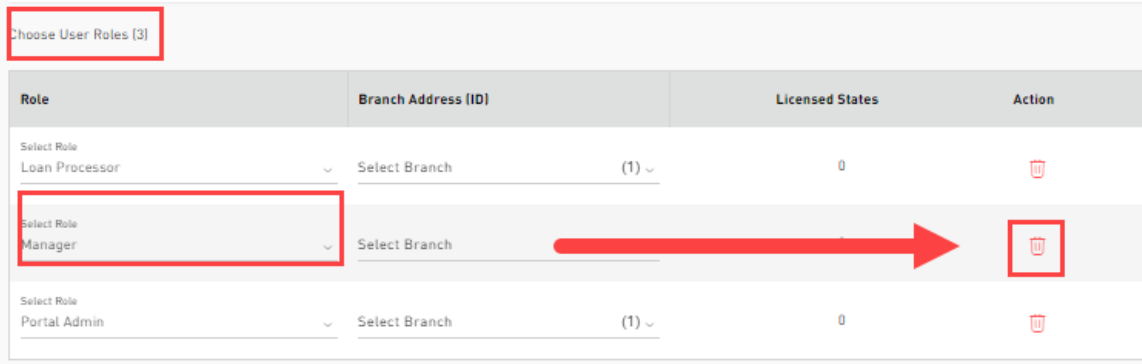
5. Click **Update User**.



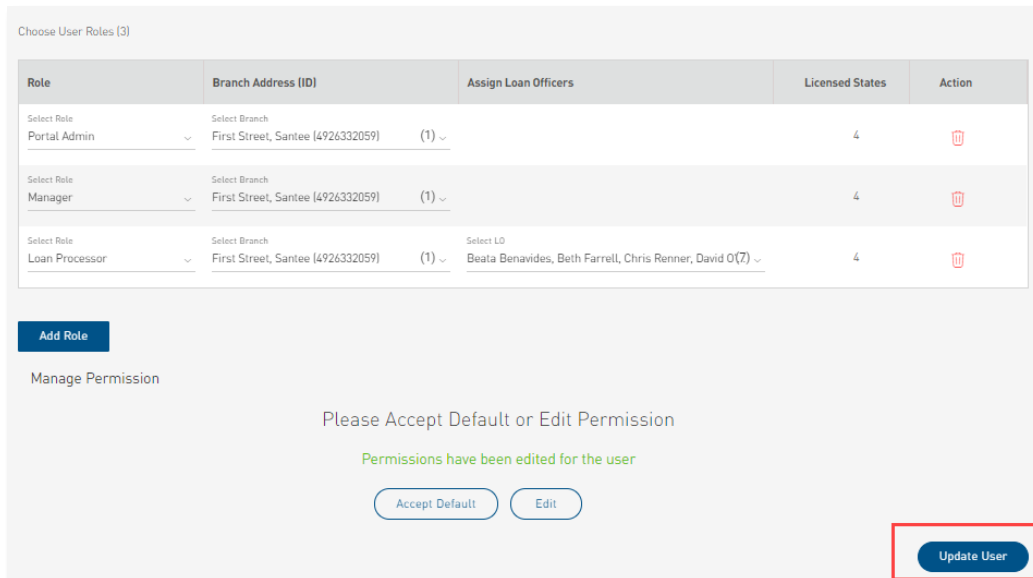
5. Edit User, continued

Remove a Role

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



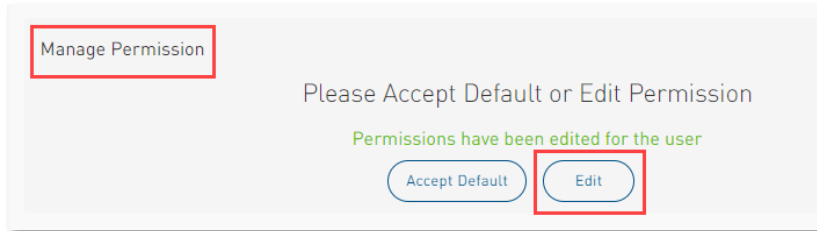
2. Click **Update User**.



5. Edit User, continued

Manage Permission

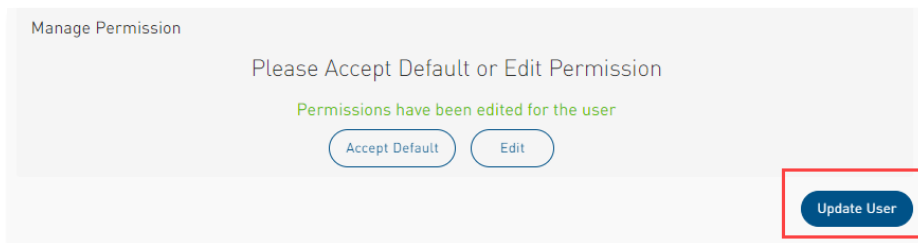
1. In the **Manage Permission** section, click **Edit**.



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**.

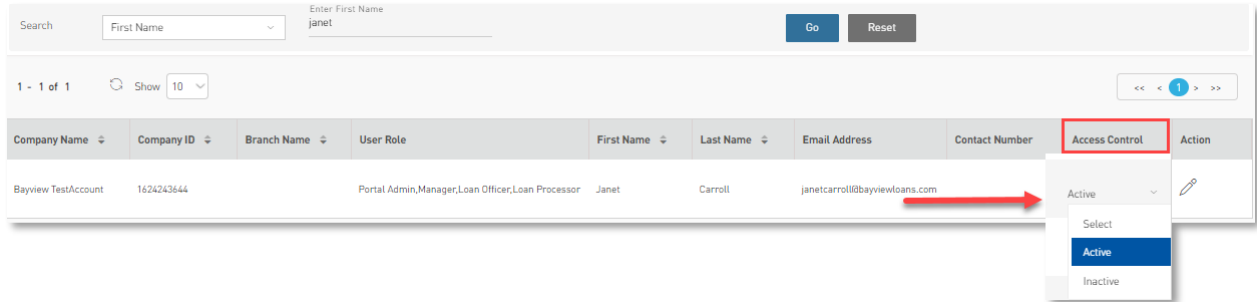


5. Edit User, continued

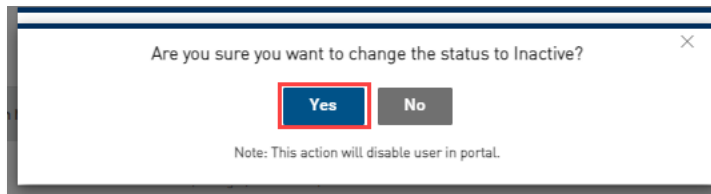
Access Control

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.

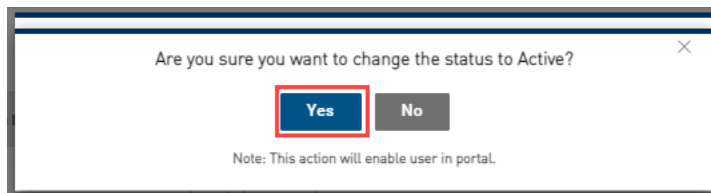


3. If making the user **Inactive**, a dialogue box displays to confirm. Select **Yes**.



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: The user is enabled to use the portal.