

Non-Delegated

Correspondent Lender Reference Guide

Non-Del Portal Admin Tasks

Non-Del Portal Admin Tasks

Last Updated: March 10, 2023

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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.

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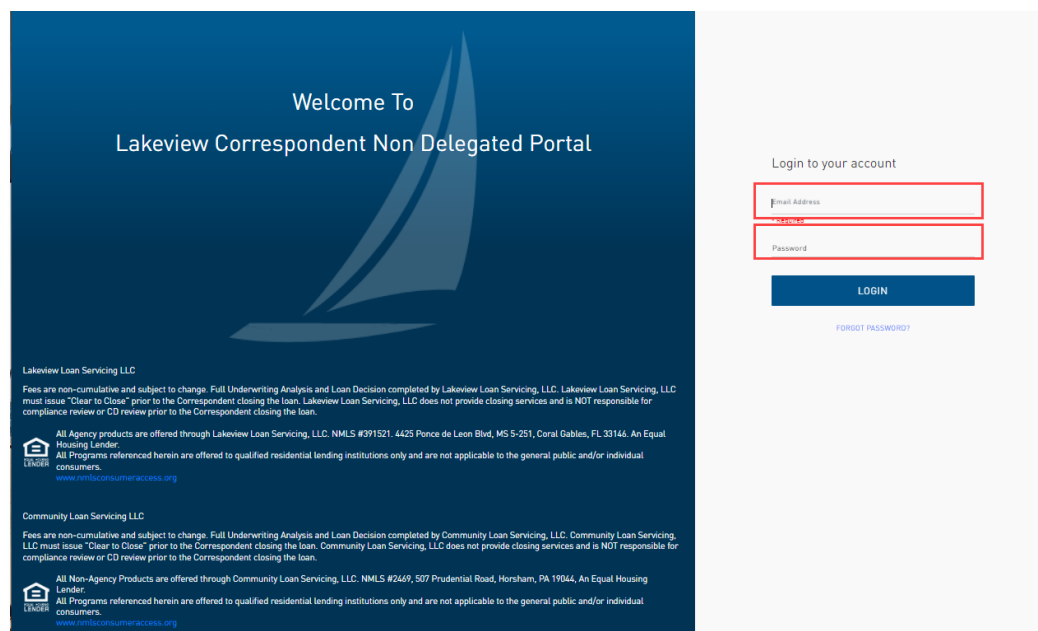
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2. Access the Correspondent Non-Delegated Portal

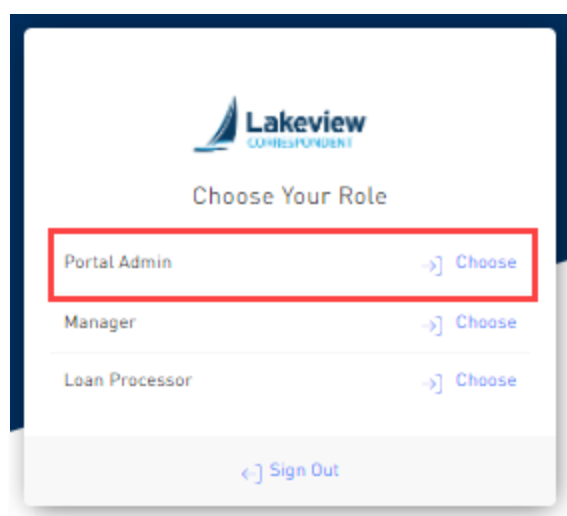
1. Open <https://nondelegated.lakeviewcorrespondent.com/#/login> in your internet browser.

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.

Community Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC_BS

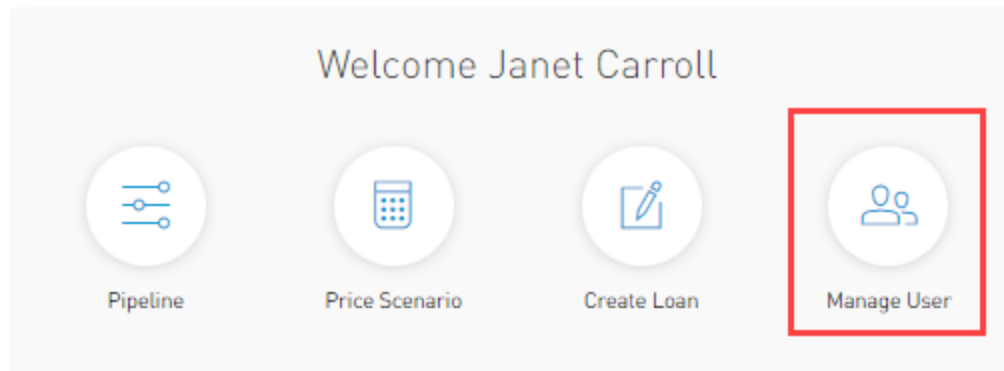
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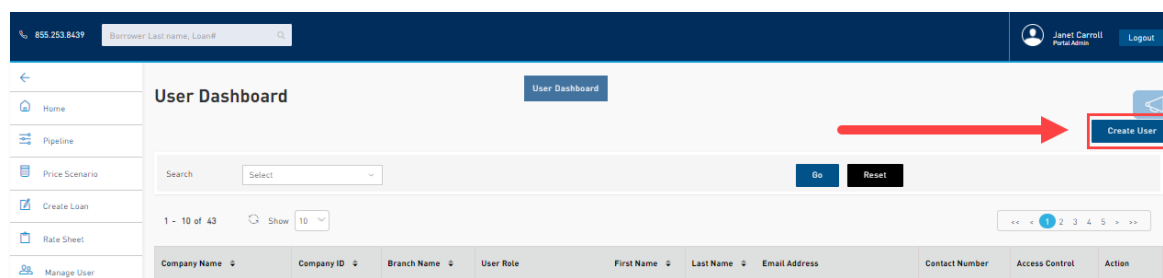
3. Create New User.

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.

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3. Create New User, continued

3. Enter the information in the required fields:

- a. Email Address
- b. First Name
- c. Last Name
- d. Email Address

Home > Admin > Create a User

Create a User

Company Information

Broker Company Name
Bayview Correspondent

Broker Company ID
7984985556

Email Address
newuser@abccompany.com

First Name
New

Last Name
User

NMLS ID (Optional)

Phone Number (Optional)

Lookup

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

Choose User Roles [0]

Role	Branch Address (ID)	Assign Loan Officers	Licensed States	Action
------	---------------------	----------------------	-----------------	--------

Add Role

Manage Permission

Please Accept Default or Edit Permission

Accept Default Edit

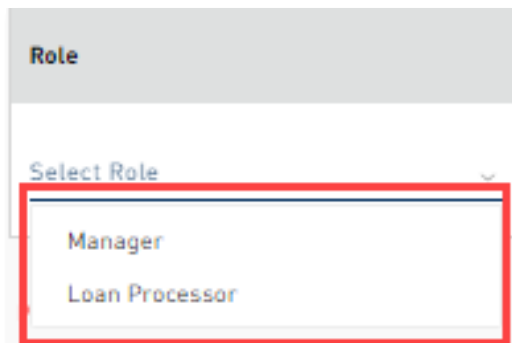
Create User

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3. Create New User, continued

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



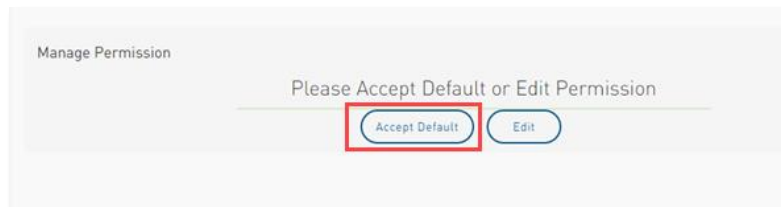
A screenshot of a web form titled "Role". Below the title is a dropdown menu labeled "Select Role". The dropdown is open, showing two options: "Manager" and "Loan Processor". A red rectangular box highlights the dropdown menu and its options.

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



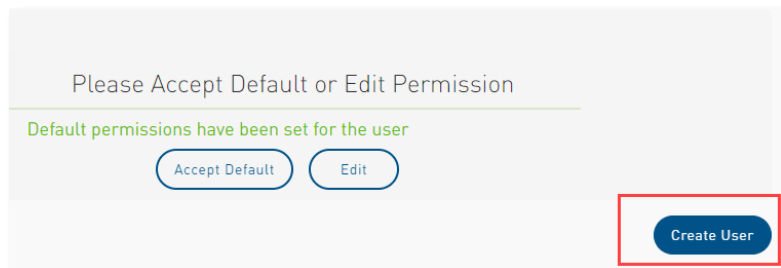
A screenshot of a web form titled "Branch Address (ID)". Below the title is a dropdown menu labeled "Select Branch". The dropdown is open, showing two options: "First Street, Santee [4926332059]" and "Select All". A red rectangular box highlights the dropdown menu and its options.

7. Click **Accept Default**.



A screenshot of a web form titled "Manage Permission". Below the title is a message: "Please Accept Default or Edit Permission". Below the message are two buttons: "Accept Default" and "Edit". A red rectangular box highlights the "Accept Default" button.

8. Click **Create User**.



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

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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**.

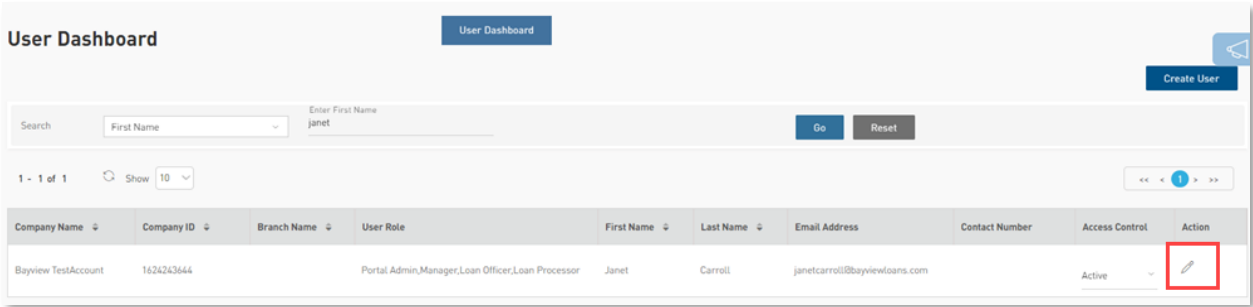
1. Select the appropriate category from the drop-down list.
2. Select the appropriate option or enter the specifics for the category selected to search by.
3. Click **Go**.

The screenshot shows the search interface of the User Dashboard. It includes a search bar with a 'Search' button (callout 1), a 'By Role' dropdown menu (callout 2) with options: Select, By Role, First Name, Last Name, and Email Address, and a 'Go' button (callout 3) next to a 'Reset' button. Below the search bar, there are filters for 'Company Name' and 'First Name'.

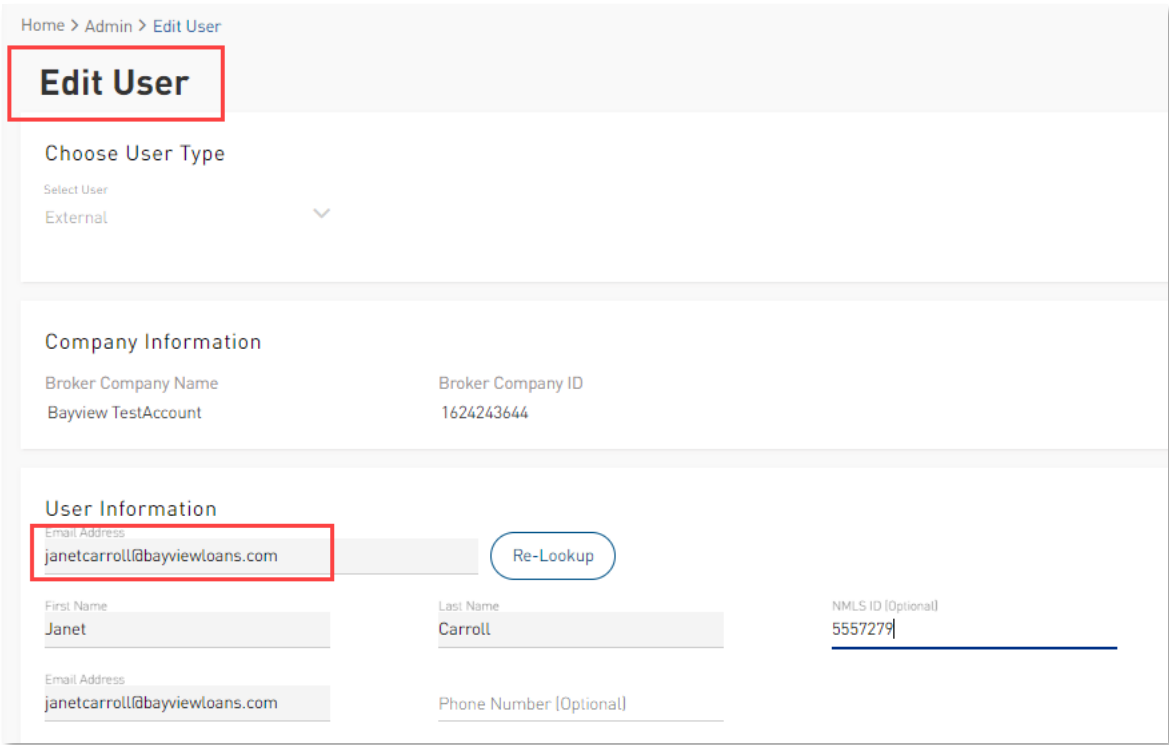
5. Edit User

Select User to Edit

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



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



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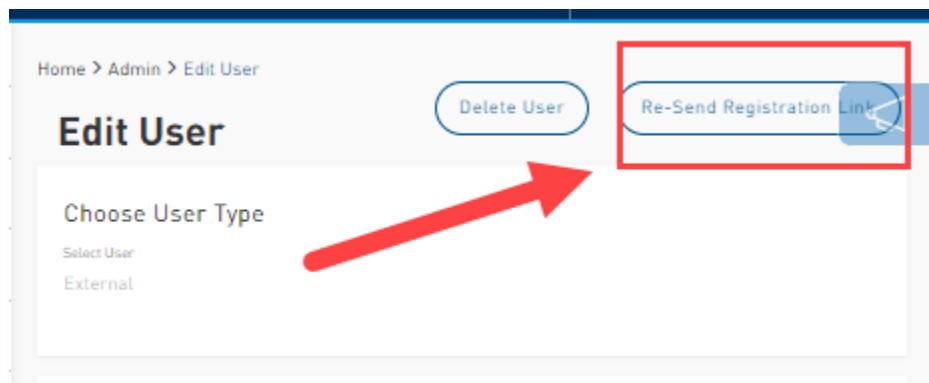
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5. Edit User, continued

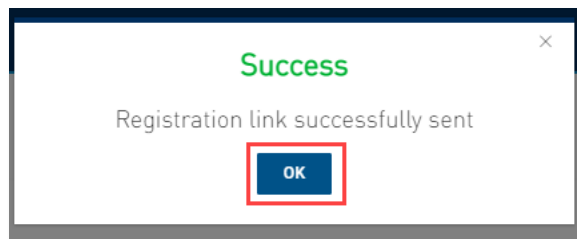
Re-Send Registration

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.

User Information

Email Address

janetcarroll@bftg.com

Re-Lookup

First Name

Janet

Last Name

Carroll

NMLS ID (Optional)

123456

Email Address

JanetCarroll@bftg.com

Phone Number (Optional)

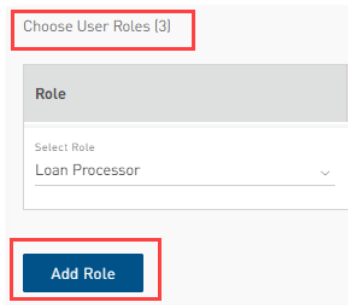
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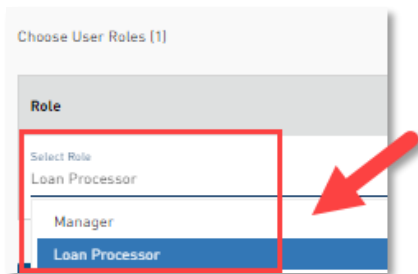
5. Edit User, continued

Add Role

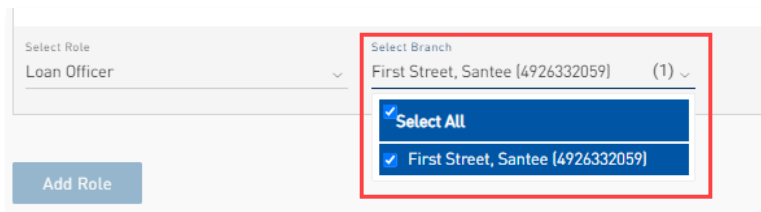
1. In the Choose User Roles section, click Add Role.



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

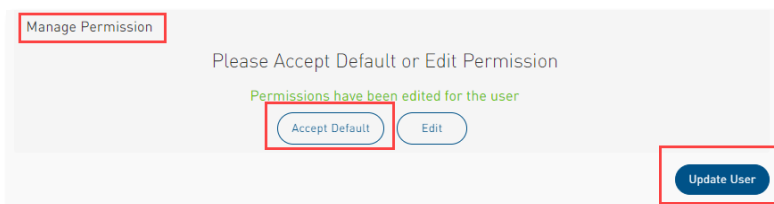


3. Select a branch from the drop-down list.



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

5. Click **Update User**.



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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

[Accept Default](#) [Edit](#)

Update User

5. Edit User, continued

Manage Permission

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

Manage Permission

Please Accept Default or Edit Permission

Permissions have been edited for the user

Accept Default

Edit

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

Features	Edit	View Only
Create Loan	<input checked="" type="checkbox"/>	
Manual New Urls	<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-Urls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1003 Sub Menus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New Urls 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**.

Manage Permission

Please Accept Default or Edit Permission

Permissions have been edited for the user

Accept Default

Edit

Update User

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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.

The screenshot shows a user management table with columns: Company Name, Company ID, Branch Name, User Role, First Name, Last Name, Email Address, Contact Number, Access Control, and Action. A user named Janet Carroll is selected. The 'Access Control' dropdown menu is open, showing options: Active (selected), Select, and Inactive. A red arrow points to the 'Active' option.

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	

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

The dialog box asks: "Are you sure you want to change the status to Inactive?". It has two buttons: Yes (highlighted with a red box) and No. A note at the bottom states: "Note: This action will disable user in portal."

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**.

The dialog box asks: "Are you sure you want to change the status to Active?". It has two buttons: Yes (highlighted with a red box) and No. A note at the bottom states: "Note: This action will enable user in portal."

Outcome: The user is enabled to use the portal.