

Non-Delegated

Correspondent Lender Reference Guide

Non-Del Portal Admin Tasks



Table of Contents

| | |
|--|----|
| Overview | 3 |
| Access the Correspondent Non-Delegated Portal | 4 |
| Create New User | 5 |
| View User List | 8 |
| Search Options..... | 8 |
| Edit User | 9 |
| Select User to Edit..... | 9 |
| Re-Send Registration..... | 10 |
| Update User Information..... | 11 |
| Add Role..... | 12 |
| Remove Role..... | 13 |
| Manage Permissions..... | 14 |
| Access Control..... | 15 |



01

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.

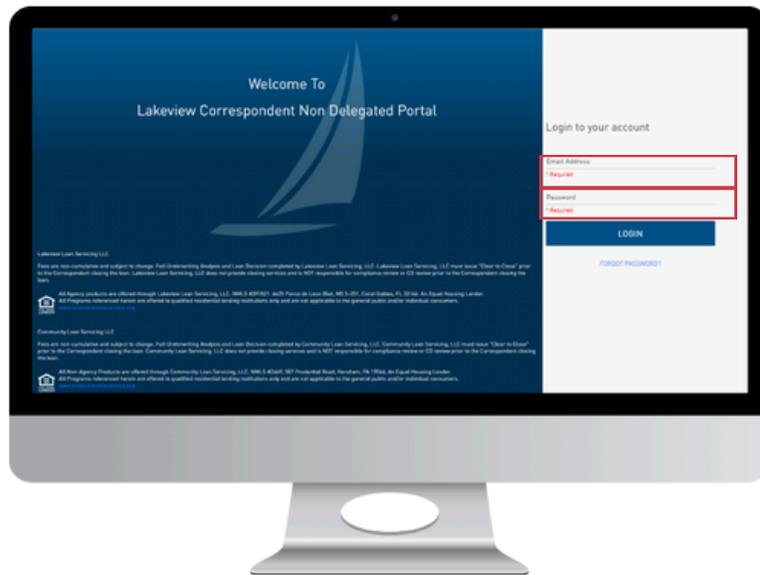


02

Access the Correspondent Non-Del Portal

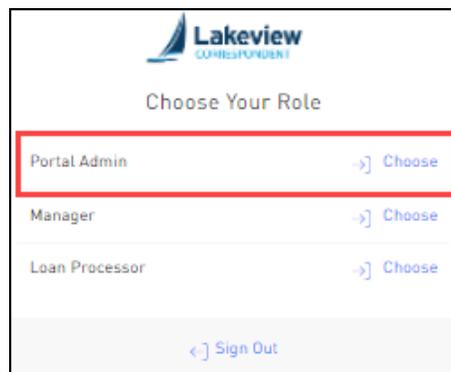
1. Open <https://nondelegated.lakeviewcorrespondent.com/#/login> in your internet browser.

Note: Chrome browser is preferred.



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

Outcome: The Welcome page displays.

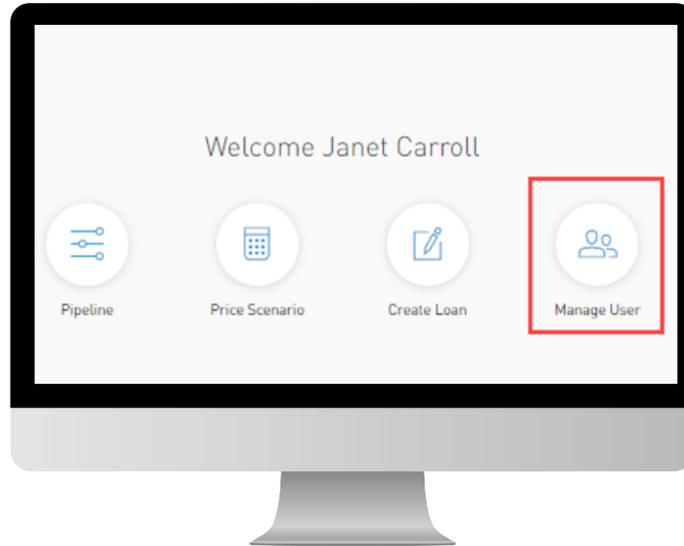


03

Create New User

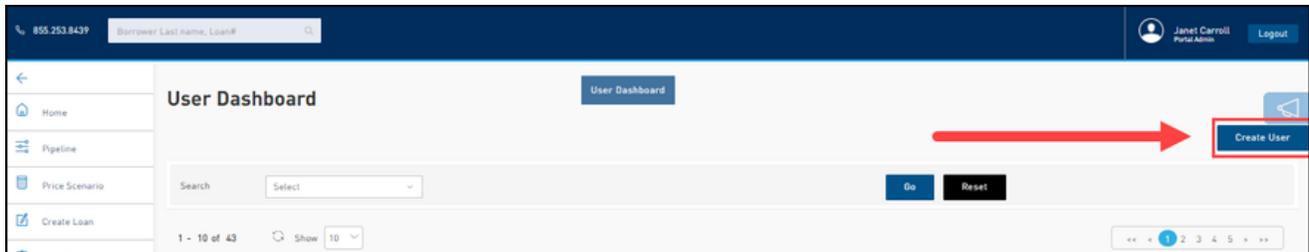
1. Click Manage User

Outcome: The User Dashboard page displays.



2. Click Create User from the User Dashboard

Outcome: The Create a User page displays



03

Create New User Continued

3. Enter the information in the required fields:
 - a. Email Address
 - b. First Name
 - c. Last Name
 - d. Email Address

The screenshot shows a web application interface for creating a user. The breadcrumb trail is "Home > Admin > Create a User". The main heading is "Create a User". Under "Company Information", the "Broker Company Name" is "Bayview Correspondent" and the "Broker Company ID" is "7984986556". The "Email Address" field contains "newuser@abccompany.com" and has a red arrow pointing to it. A "Lookup" button is next to it. The "First Name" field contains "New" and has a red arrow pointing to it. The "Last Name" field contains "User" and has a red arrow pointing to it. The "Email Address" field at the bottom also contains "newuser@abccompany.com" and has a red arrow pointing to it. Other fields include "NMLS ID [Optional]", "Phone Number [Optional]", and "Role".

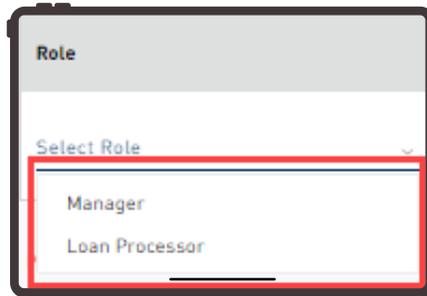
4. Once the user information has populated, click **Add Role**.

The screenshot shows a dialog box titled "Choose User Roles [0]". It contains a table with columns: "Role", "Branch Address [0]", "Assign Loan Officers", "Licensed States", and "Action". Below the table is a red-bordered button labeled "Add Role". Underneath is a "Manage Permission" section with the text "Please Accept Default or Edit Permission" and two buttons: "Accept Default" and "Edit". A "Create User" button is located in the bottom right corner.

03

Create New User Continued

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



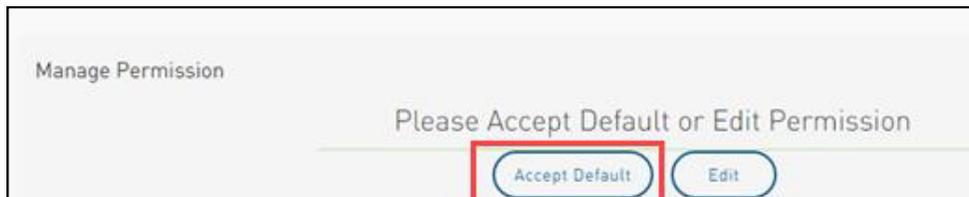
A screenshot of a 'Role' dropdown menu. The menu is open, showing two options: 'Manager' and 'Loan Processor'. The dropdown is highlighted with a red border.

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



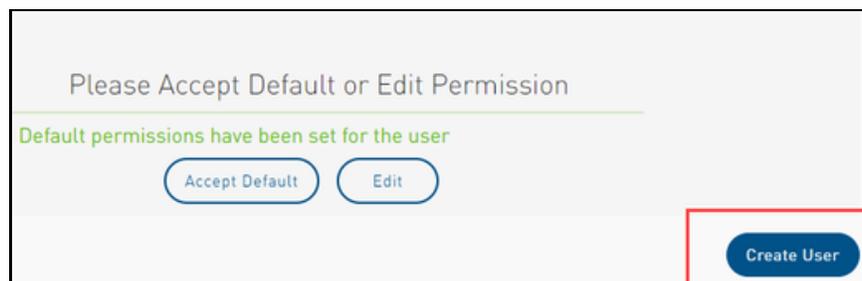
A screenshot of a 'Branch Address (ID)' dropdown menu. The menu is open, showing two options: 'Select All' and 'First Street, Santee (4926332059)'. The 'First Street, Santee (4926332059)' option is selected and highlighted with a blue background. The dropdown is highlighted with a red border.

7. Click **Accept Default**.



A screenshot of a 'Manage Permission' dialog box. The dialog box contains the text 'Please Accept Default or Edit Permission' and two buttons: 'Accept Default' and 'Edit'. The 'Accept Default' button is highlighted with a red border.

8. Click **Create User**.



A screenshot of a 'Please Accept Default or Edit Permission' dialog box. The dialog box contains the text 'Please Accept Default or Edit Permission' and a green message: 'Default permissions have been set for the user'. There are two buttons: 'Accept Default' and 'Edit'. The 'Create User' button is highlighted with a red border.

04

View User List

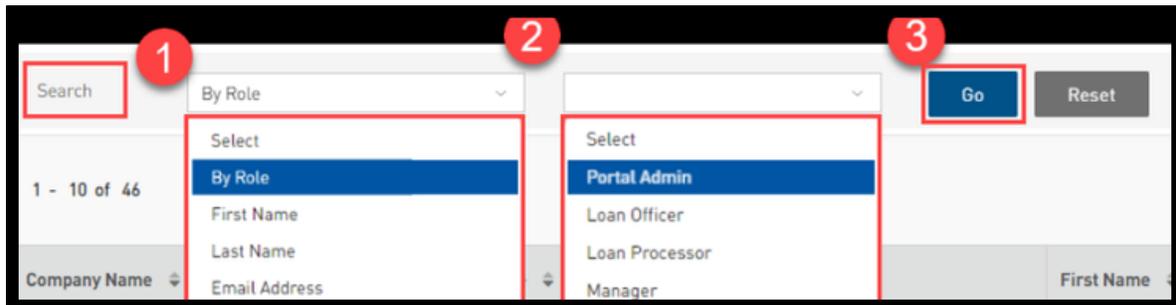
A Portal Admin can view the number of users enrolled from the User Dashboard. The dashboard displays the following information for all users.

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

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**.



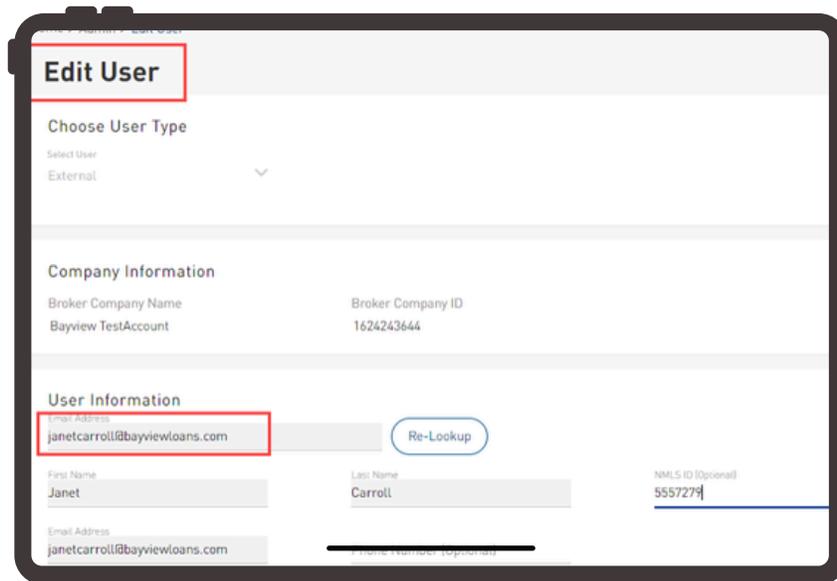
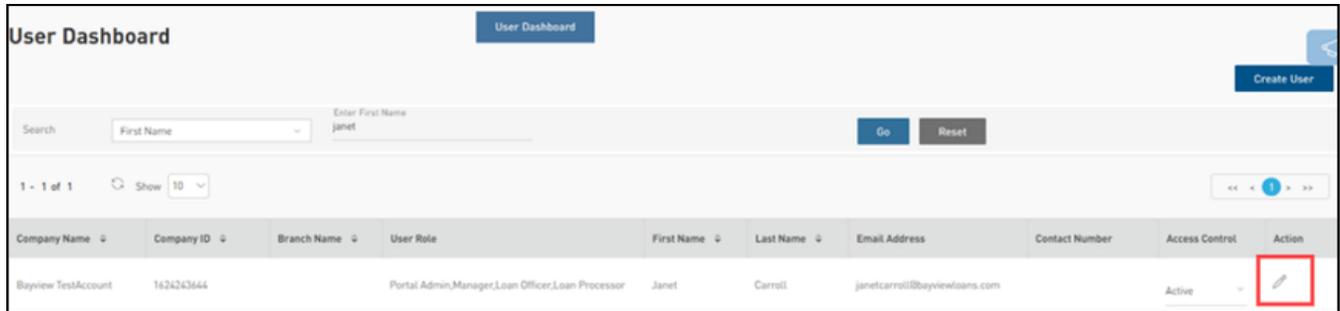
05

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.



05

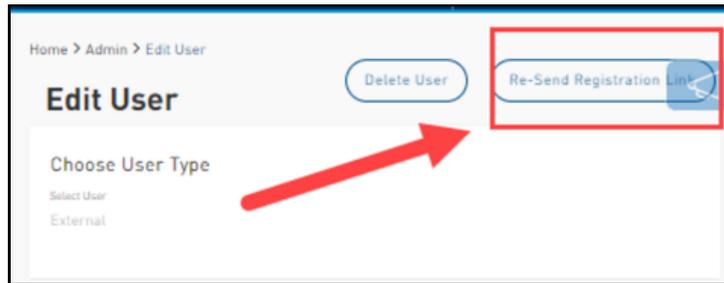
Edit User Continued

Re-Send Registration

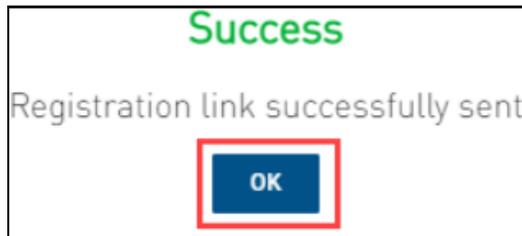
If a registered user reports they cannot access the Lakeview Correspondent Non-Delegated Portal, the Portal Admin can re-send the registration link.

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

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



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



05

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.

The screenshot shows a web form titled "User Information". The form contains the following fields and elements:

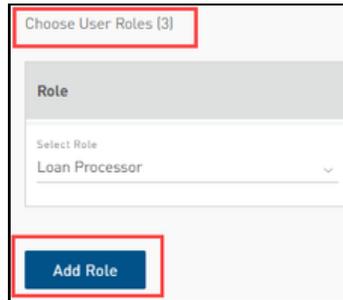
- User Information** (Title, highlighted with a red box)
- Email Address**: janetcarroll@bftg.com
- Re-Lookup** (Button)
- First Name**: Janet
- Last Name**: Carroll
- NMLS ID (Optional)**: 123456
- Email Address**: JanetCarroll@bftg.com
- Phone Number (Optional)** (Field, highlighted with a red box)

05

Edit User Continued

Add Role

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



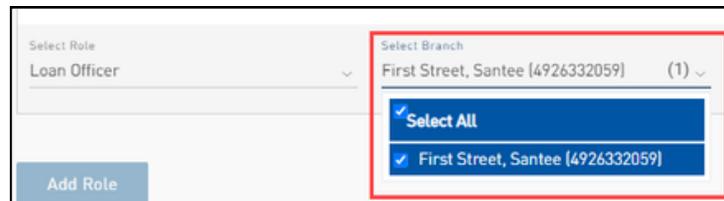
The screenshot shows a form titled "Choose User Roles (3)". It contains a "Role" section with a "Select Role" dropdown menu currently set to "Loan Processor". Below the dropdown is a blue "Add Role" button. Red boxes highlight the title and the button.

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



The screenshot shows the "Choose User Roles (1)" form with the "Role" dropdown menu open. The dropdown list shows "Loan Processor" selected, with "Manager" and "Loan Processor" visible. A red arrow points to the selected "Loan Processor" option. Red boxes highlight the dropdown menu and the selected option.

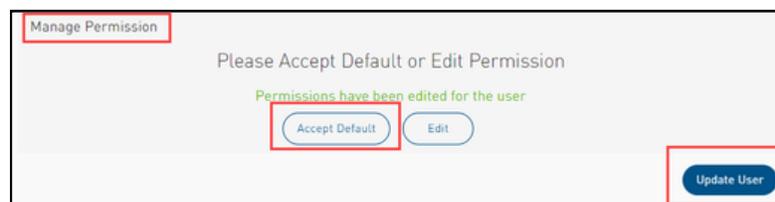
3. Select a branch from the drop-down list.



The screenshot shows the "Choose User Roles" form with the "Select Role" dropdown set to "Loan Officer" and the "Add Role" button highlighted. The "Select Branch" dropdown is open, showing "First Street, Santee (4926332059) (1)" selected. The dropdown list also shows "Select All" and "First Street, Santee (4926332059)". Red boxes highlight the "Select Branch" dropdown and the selected option.

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

5. Click Update User.



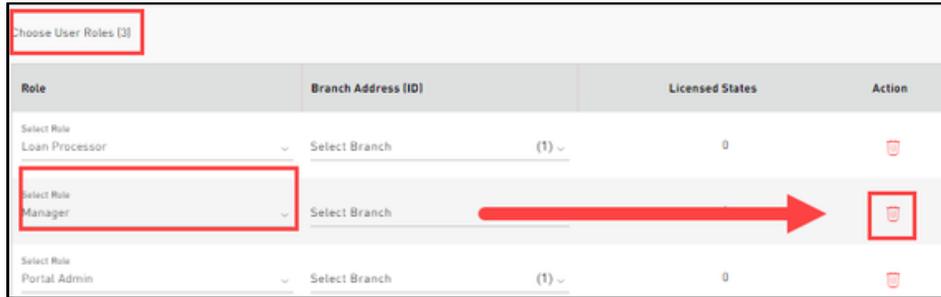
The screenshot shows the "Manage Permission" section with the heading "Please Accept Default or Edit Permission". Below the heading is a green message: "Permissions have been edited for the user". There are two buttons: "Accept Default" and "Edit". The "Accept Default" button is highlighted with a red box. At the bottom right, there is a blue "Update User" button, also highlighted with a red box.

05

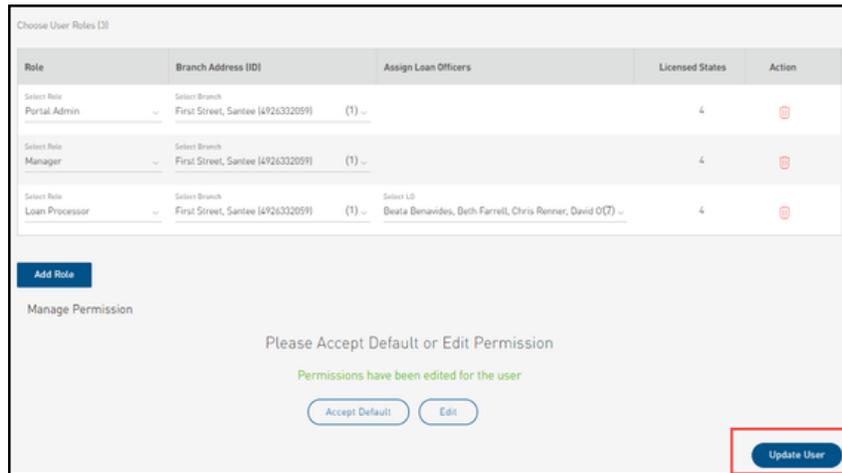
Edit User Continued

Remove Role

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



2. Click Update User.

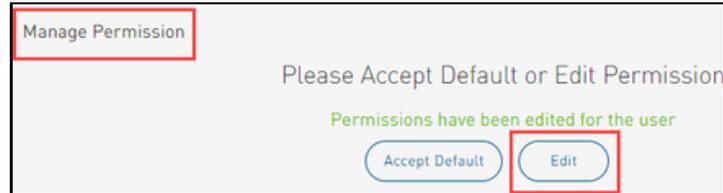


05

Edit User Continued

Manage Permissions

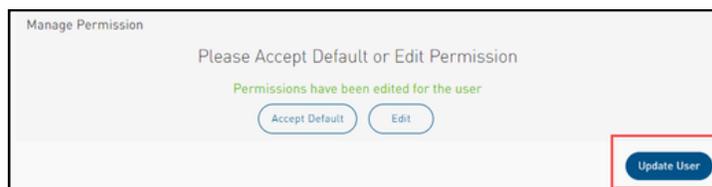
1. In the Manage Permission section, click Edit.



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

| Features | Edit | View Only |
|-----------------------------|-------------------------------------|-------------------------------------|
| Create Loan | <input checked="" type="checkbox"/> | |
| Manual New Urls | <input checked="" type="checkbox"/> | |
| Import 3.4 | <input checked="" type="checkbox"/> | |
| Import FNM | | <input type="checkbox"/> |
| Pipeline | | <input checked="" type="checkbox"/> |
| Active Pipeline | | <input checked="" type="checkbox"/> |
| Ended Pipeline | | <input checked="" type="checkbox"/> |
| Cancelled/Declined Pipeline | | <input checked="" type="checkbox"/> |
| 103 New-Urls | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 103 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"/> |
| Risk Scenario | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

3. Click Update User.



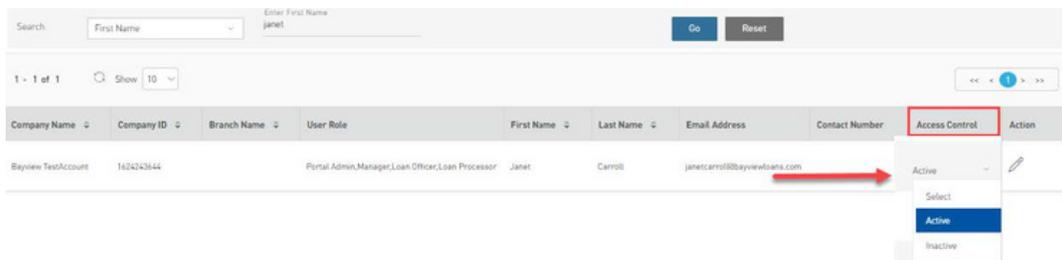
05

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: The **Edit User** page displays.



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

Outcome: The user is enabled to use the portal.

