Non-Delegated

Correspondent Lender Reference Guide

Non-Del Portal Admin Tasks

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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!

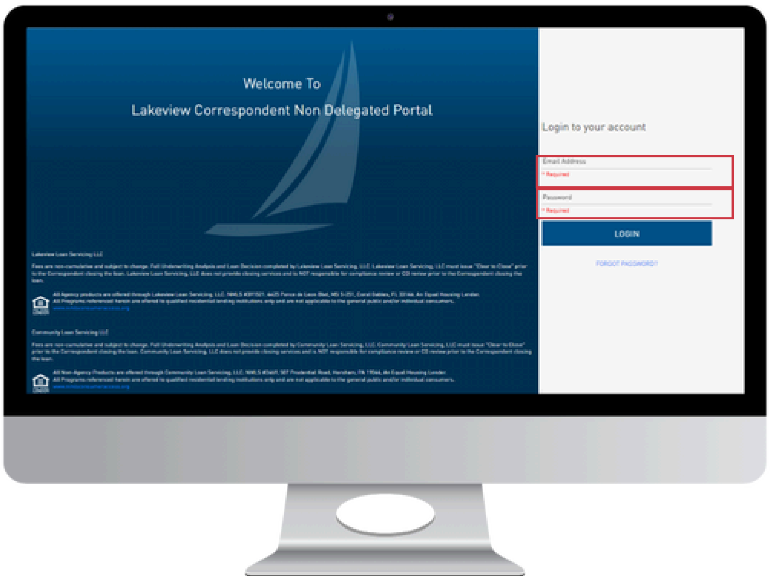
- The Portal Admin cannot reset a user's password; only the user can reset their password.
- The system does not store user passwords. Each user is responsible for setting and remembering their password.

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.

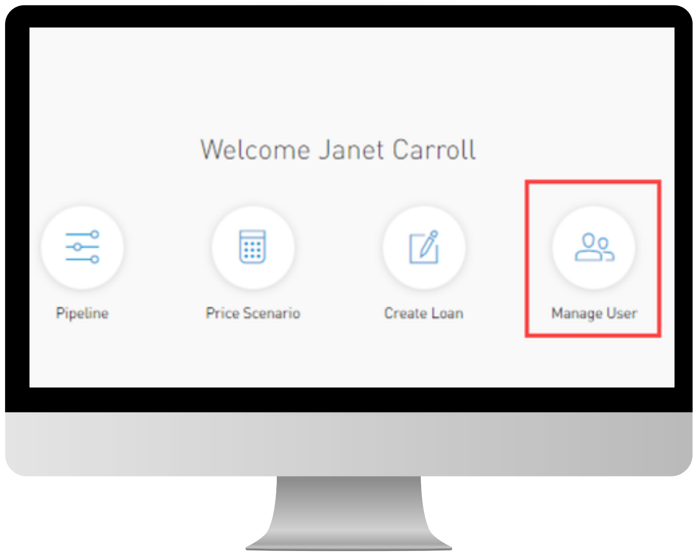
   Outcome: The Welcome page displays.

03

Create New User

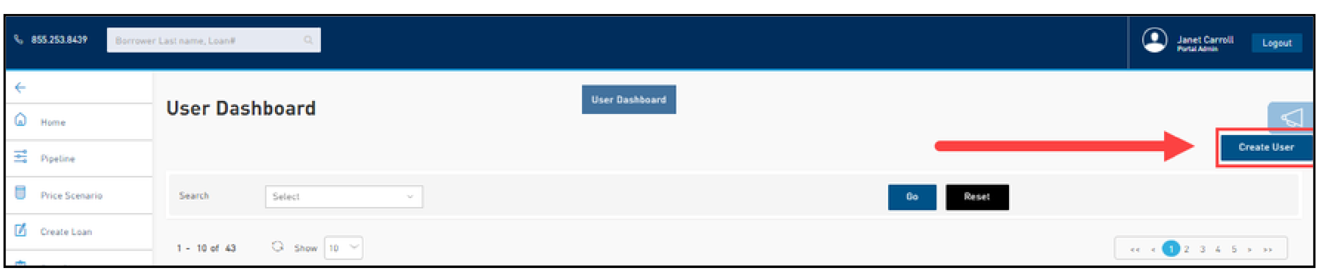
1. Click Manage User

   Outcome: The User Dashboard page displays.



2. Click Create User from the User Dashboard

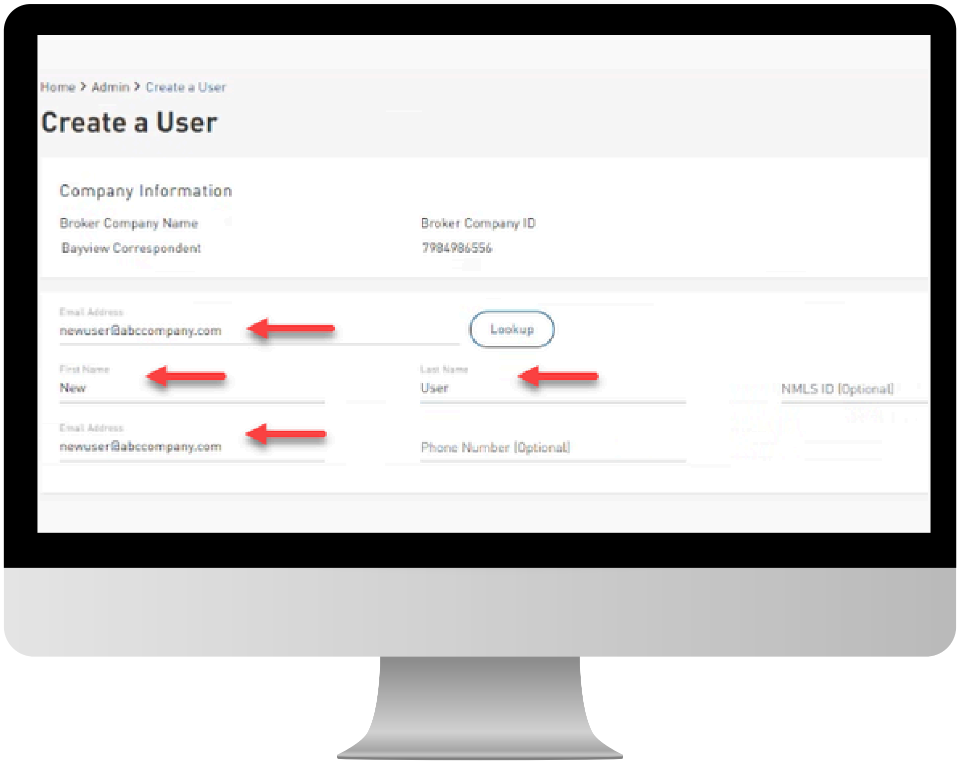
   Outcome: The Create a User page displays



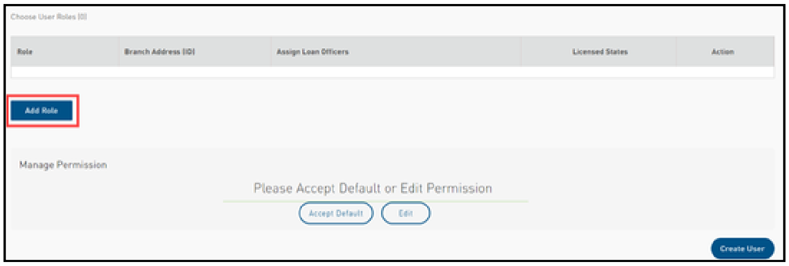
03

Create New User Continued

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



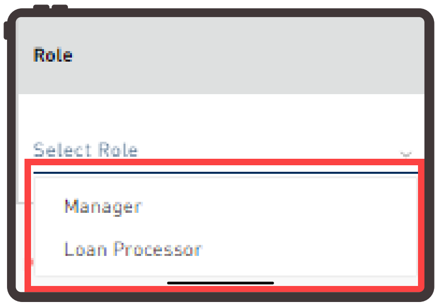
4. Once the user information has populated, click **Add Role.**



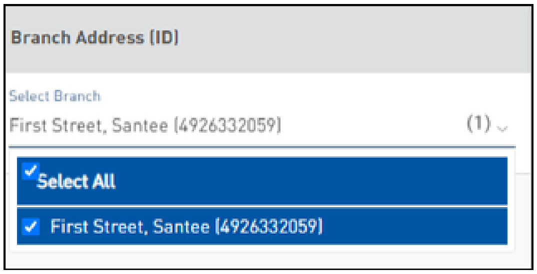
03

Create New User Continued

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

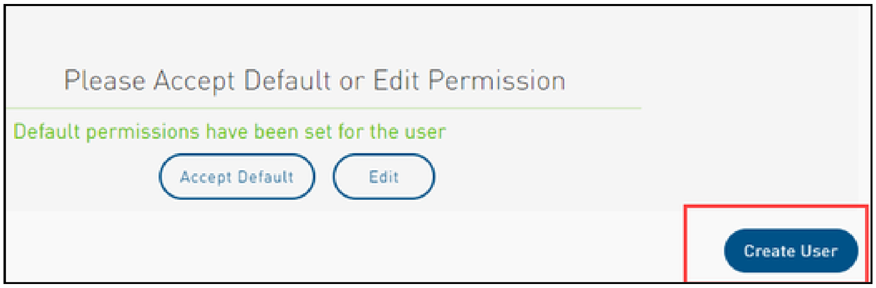


6. Select the appropriate **Branch** from the drop-down list.



7. Click **Accept Default.**

8. Click **Create User.**



04

View User List

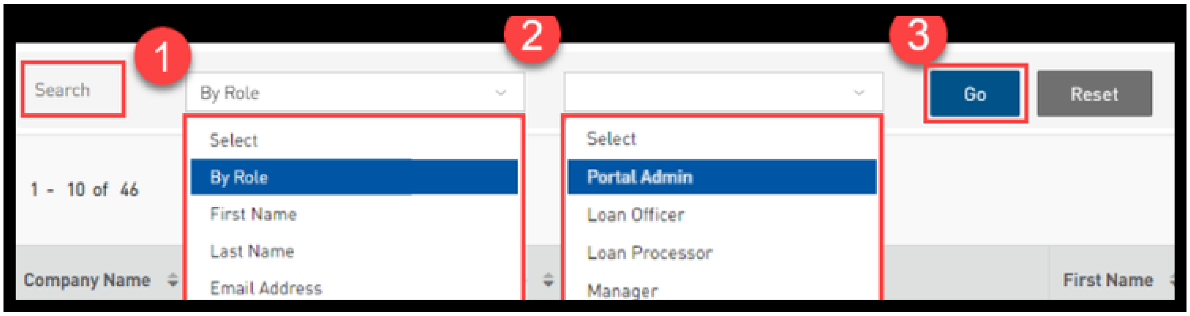
A Portal Admin can view the number of users enrolled from the User Dashboard. The dashboard displays the following information for all users.

- **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.**

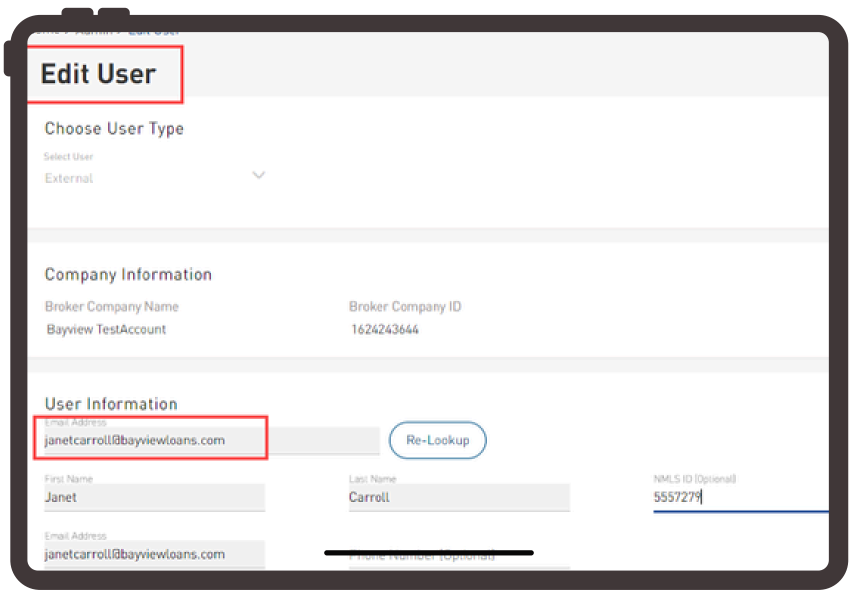


05

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.



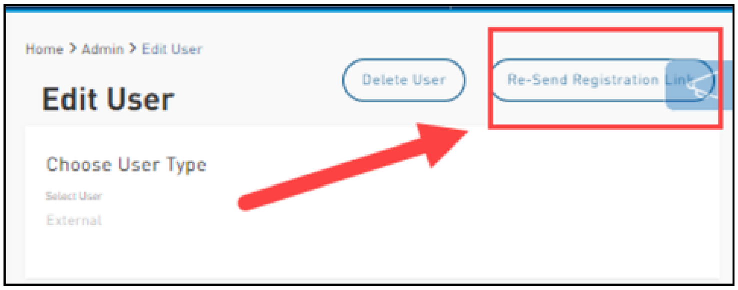
05

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.**

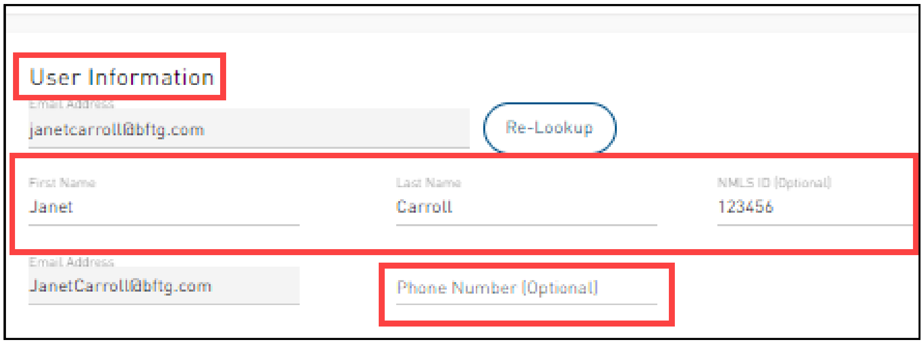
05

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.



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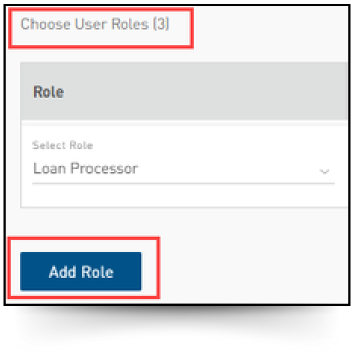
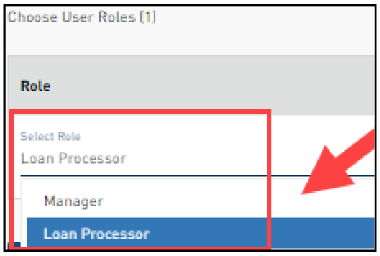
Edit User Continued

Add Role

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



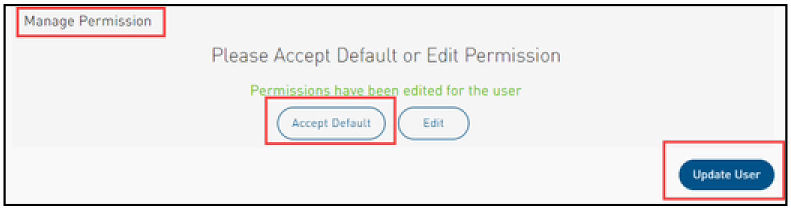
2. Select a role from the drop-down list.



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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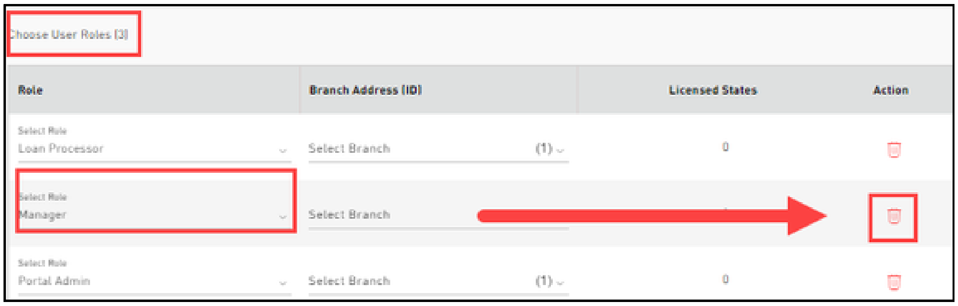
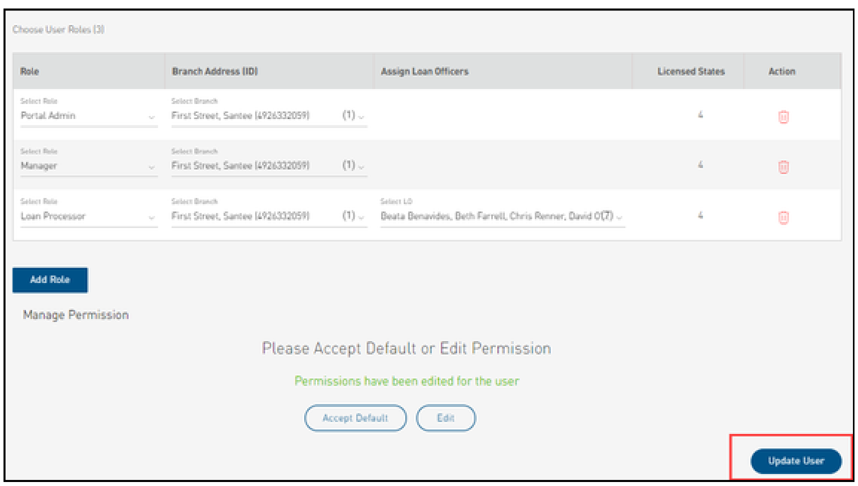
Edit User Continued

Remove Role

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



2. Click Update User.



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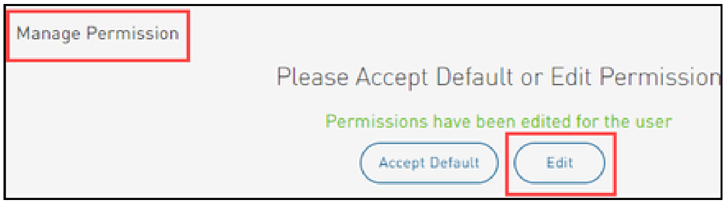
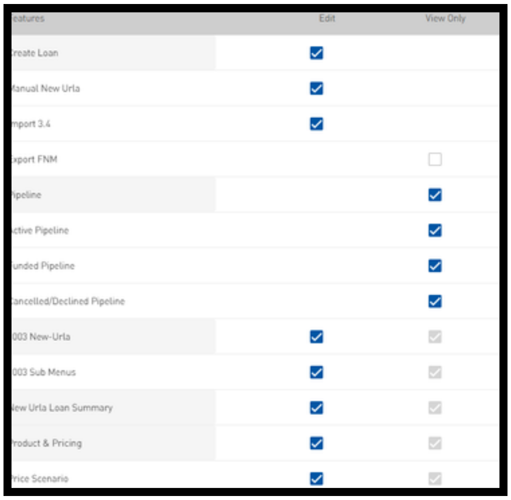
Edit User Continued

Manage Permissions

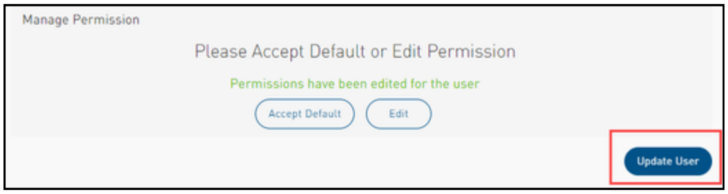
1. In the Manage Permission section, click Edit.



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



3. Click Update User.



05

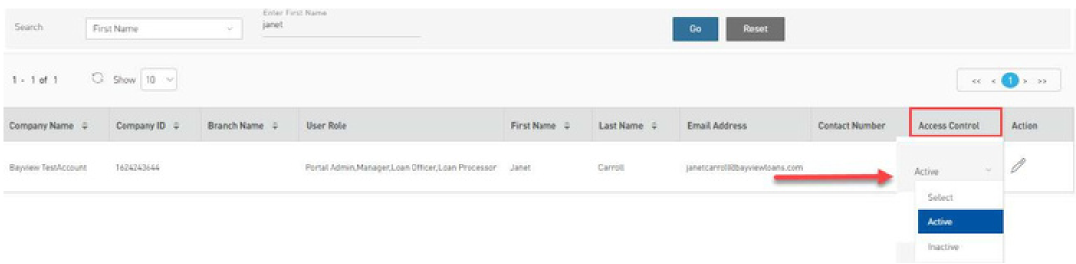
Edit User Continued

Access Control

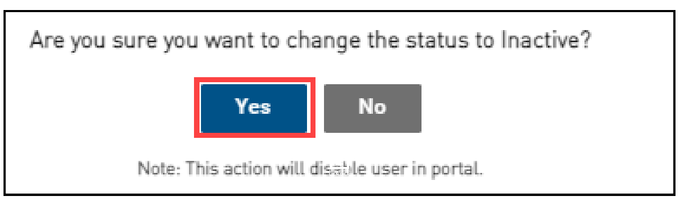
A Portal Admin can change a user's status to Active/Inactive by selecting an option from the Access Control drop-down list.

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.