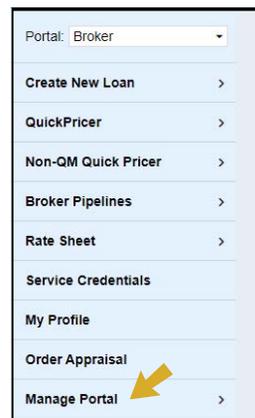


Objective: This cheat sheet was designed to assist you in adding new users to PRONTO. Please note that Unite Mortgage will create profiles for the Broker Owner and an original set of Admin users. ONLY Unite Mortgage can add additional Admin users (called "supervisors" in the system), but multiple admins/supervisors are permitted.

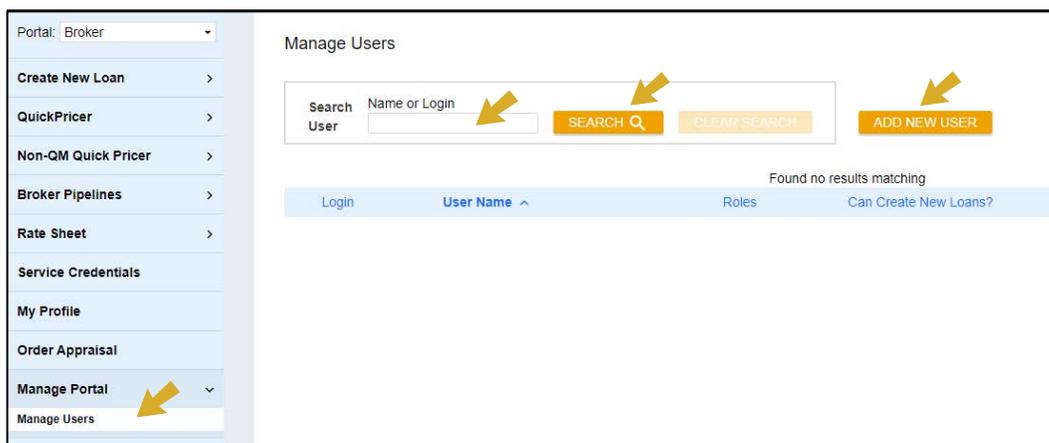
Process:

Step 1: You must be an Admin/Supervisor to add or edit existing users in Unite Mortgage

Step 2: Select "**Manage Portal**" from the main Pipeline view



Step 3: Click "**Manage Users**" to search and edit existing users, or Add New User(s)



Step 4: Click the "**Add New User**" button and complete all fields with a red asterisk in each of the following tabs

User Information

1. Enter user's First Name.
2. Enter user's Last Name.
3. Enter user's phone number.
4. Enter user's cell phone number and select "Private: For multi-factor authentication only".
Note: The cell phone number is required to send an SMS text for authentication upon initial sign on.
5. Enter user's email address. **Note:** Do not check the "Send task-related e-mail" box.



Add New User

User Information Credentials Roles, Loan Access, & Permissions Broker Relationships Licenses System Access Services

* Indicates required fields

Personal Information

Name
First Name * Middle Name Last Name * Suffix Name on Loan Documents

Contact Information

Phone * Fax Cell * Private: For multi-factor authentication only

Pager

Email * Send task-related e-mail

Credentials

1. Enter user's Login Name. Login name cannot be duplicated. We recommend using an email address.
2. Create Password for user based on password requirements (10 characters, numbers, letters, capital and lowercase, and a special character)
3. Retype password, then hit tab to ensure all password checklist requirements are met.
4. Select "Must change password at next login"
5. Check the "Expire passwords every" box and indicate "60 days following update"
6. Select Active (or Inactive if removing access)

Add New User

User Information **Credentials** Roles, Loan Access, & Permissions Broker Relationships Licenses System Access Services

Login Information

Login Name * Password * Retype *

Must change password at next login

Password never expires

Password expires on

Expire passwords every days following update

Status

Active

Inactive

Roles, Loan Access, & Permissions

1. Roles – This determines the user's functions within PRONTO. Assign all functions performed by the user (i.e. if performs both as a Loan Officer and Processor, assign both functions).
 - a. **Loan Officer:** Assign this for a Loan Officer user, and to receive automated loan status notifications.
 - b. **Processor:** Assign this if the user is processing the transaction, and to receive automated loan status notifications.
2. Loan Access Level – This will determine the user's access to the pipeline.



- a. Corporate – within company – If assigned, the user will be able to see all loans in the pipeline regardless of assignment. This access is suggested for processors who may be working with multiple loan officers.
 - b. Individual – only if assigned. If assigned, the user will only be able to see the loans assigned or created in his/her name.
3. Permissions – This determines if the user will be able to view and/or create loans within PRONTO. Select all permissions needed for the user (i.e. if user needs to create and view, select both).

Add New User

User Information Credentials **Roles, Loan Access, & Permissions** Broker Relationships Licenses System Access Services

Roles *

Loan Officer

Processor

Secondary

Post-Closer

Loan Access Level

Corporate - within company

Individual - only if assigned

Permissions

Allow viewing wholesale channel loans.

Allow creating wholesale channel loans.

Licenses

1. Enter the NMLS ID if applicable for the user
2. Use the **"Add License"** button to associate the State License(s) for the user; enter the license number, state, and expiration date. If there is no state license, type "None" as the License #.

Add New User

User Information Credentials Roles, Loan Access, & Permissions Broker Relationships **Licenses** System Access Services

Nationwide Mortgage Licensing System and Registry

Loan Originator NMLS ID: 01234567

State Licenses

ADD LICENSE

License #	State	Expiration Date
01234567	CA	1/1/2022

Please fill out all required fields: First Name, Last Name, Phone, Email, Cell Phone, Login Name, Password, Retype Password

Step 5: Click "OK" to save all changes and notify your new user of his/her username and password.

If you still require assistance, you can contact info@unitemortgage.com or call **800.777.1207**.

Access our PRONTO portal or reset your PRONTO password [here](#). Through a series of prompts and email verification, the user will be able to reset their password quickly and at any time of the day.