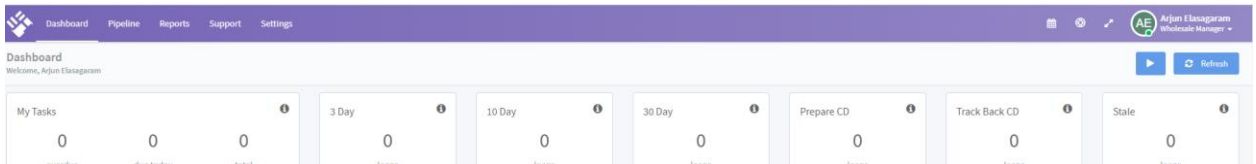


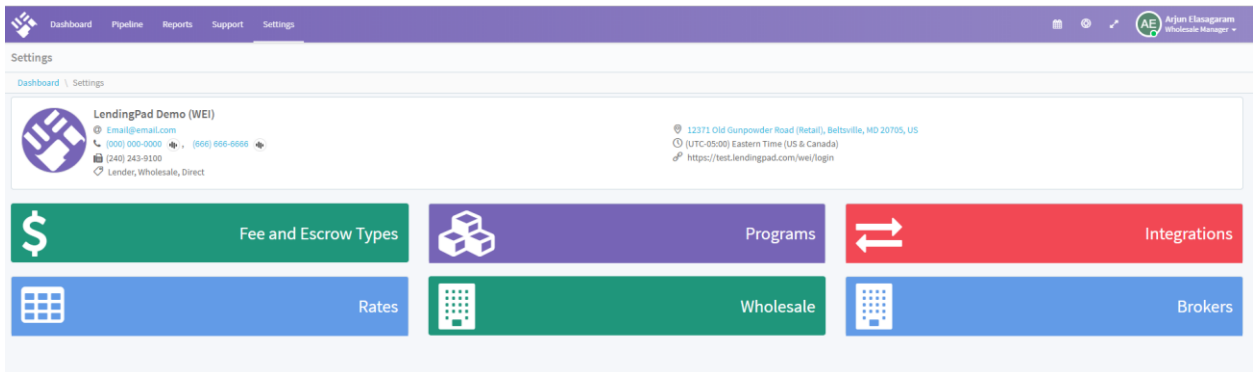
# LENDER SETUP

## How to invite TPO broker to LendingPad?

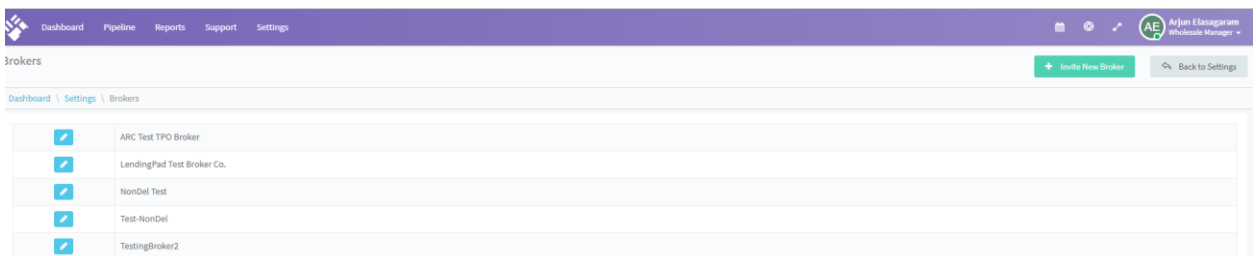
1. Login into LendingPad as a “Wholesale Manager”



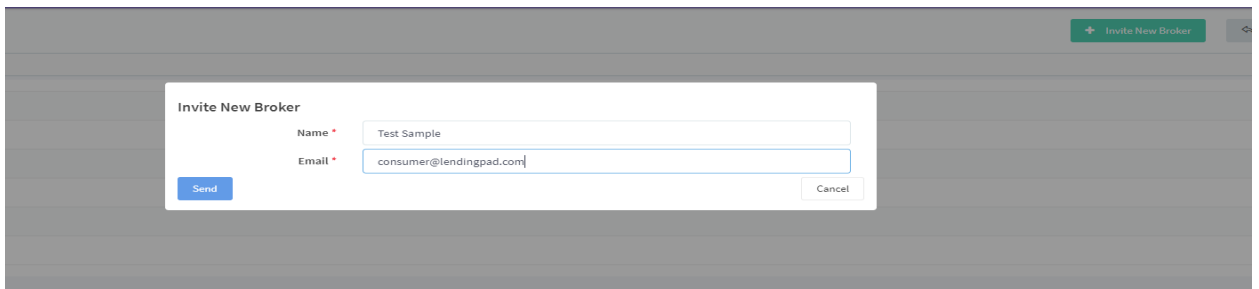
2. Click on “Settings”



3. Click on “Brokers” tab



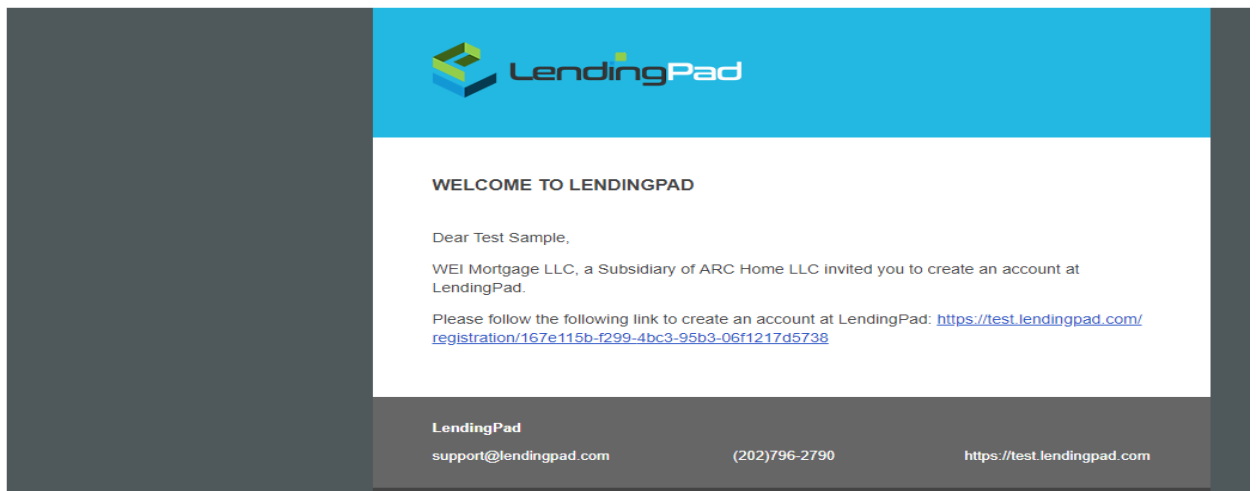
4. Click on “Invite New Broker” button and input the required info then click on “Send”



5. After clicking on send, broker will receive an email to create an account at LendingPad for his/her company

(Testing) Welcome to LendingPad Inbox x

LendingPad  
to Test ▾



This concludes what’s needed on lender side. Broker will continue the following screens to setup his/her company account in LendingPad, company users, MLO’s licenses and credit report/AUS credentials.

## BROKER SETUP

### Major steps for brokers are:

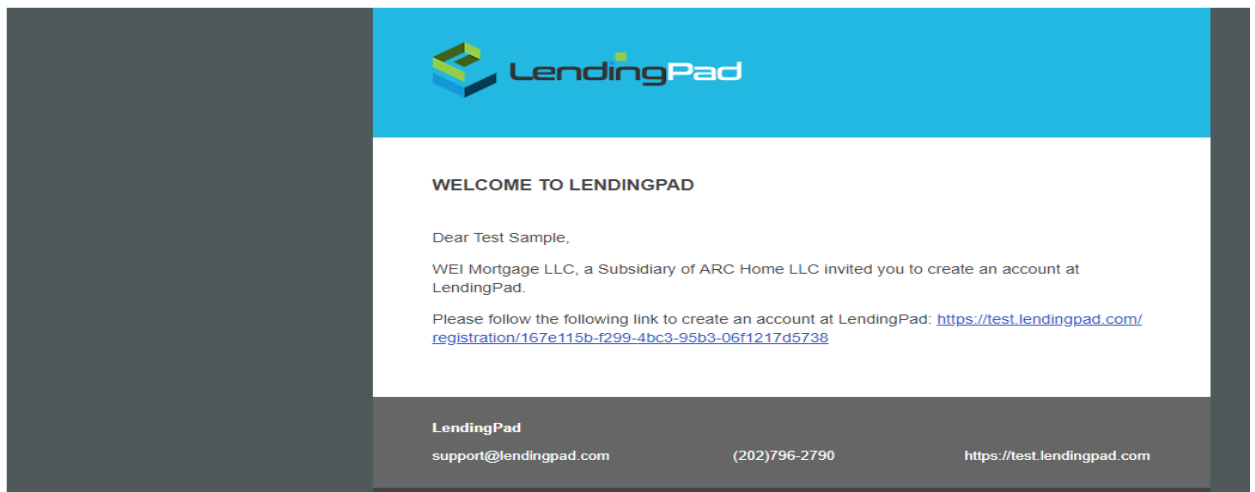
- Create a broker company account in LendingPad (steps 1 to 3)
- Activate system administrator account (steps 4 to 6)
- Add company licenses (steps 7 to 8)
- Add “Branch” if the broker company has more than one branch (steps 9 to 10)
- Using System Administrator Account to Add Users (steps 11 to 13)
- User Licenses (LO roles), Credit Report and AUS actions (Steps 14 to 20)

### Create a broker company account in LendingPad

1. Broker receives this email to register for the company account in LendingPad.

(Testing) Welcome to LendingPad Inbox x

LendingPad  
to Test ▾



2. Broker should click on the link to complete the company registration screen as shown below.



## Company Registration

### User Account Information

First Name \*   
Last Name \*   
Email \*   
Phone \*

### Company Information

Name \*   
NMLS Id \*

### Company Address

Street \*   
City \*   
State \*   
Zip Code \*

### Company Contacts

Email \*   
Toll Free Phone \*   
Work Phone   
Fax   
Web Site

I'm not a robot



I agree to the LendingPad [Privacy Policy](#), [Terms of Use](#) and [Terms of Service](#).

CREATE NEW ACCOUNT

3. After inputting the required info, click on the "Create New Account".



CONGRATULATIONS!

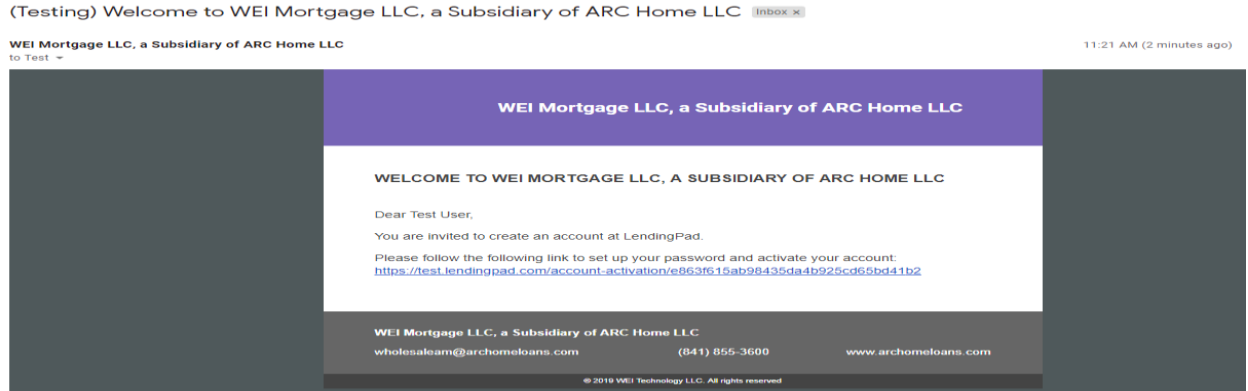
You have created an account at LendingPad.

An e-mail with account activation information has been sent. Please follow the instructions to activate your account.

© 2019 WEI Technology LLC. All rights reserved

## Activate system administrator's account

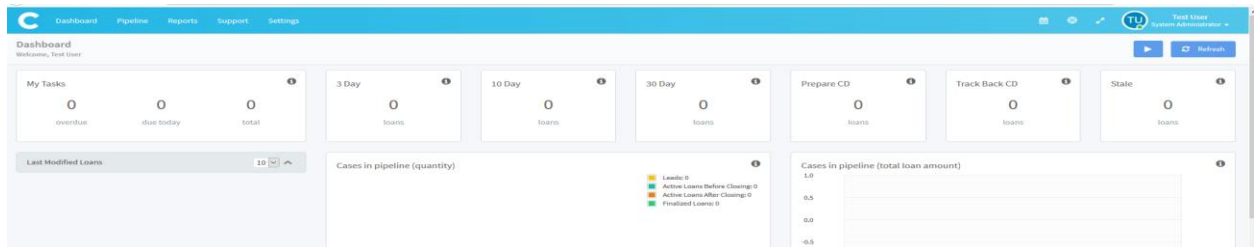
- At this time lender's wholesale manager should receive an email stating broker company has been invited to LendingPad.



- After the company account is created, the broker user will receive an email to activate his/her system admin account.

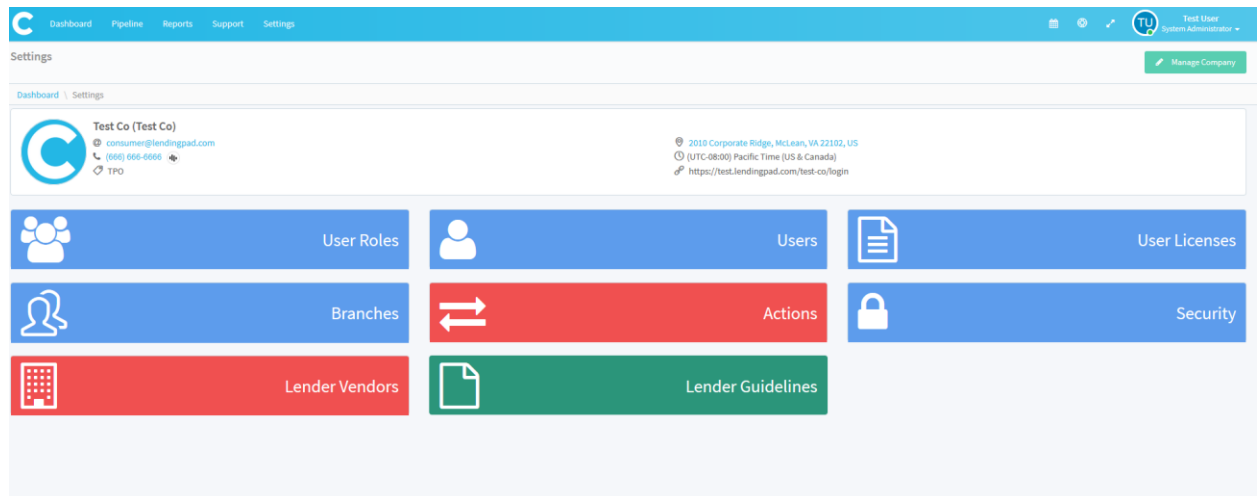


- Broker user should activate his/her account using the email invite link and login to LendingPad (Default user role will be system admin)

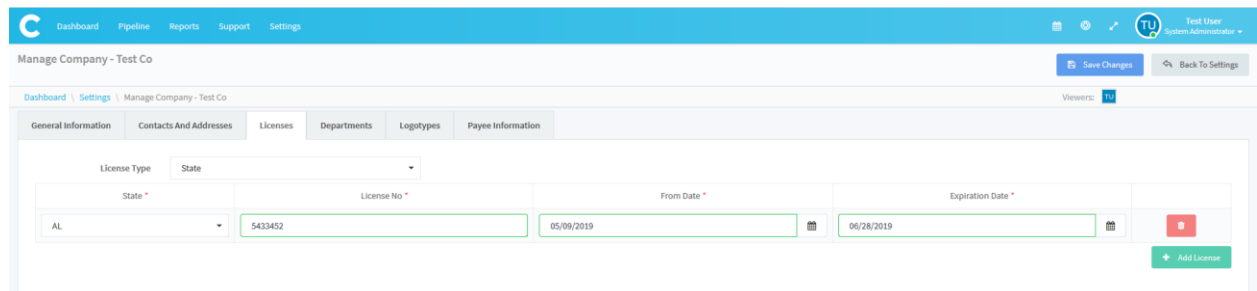


## Add company licenses

### 7. Click on “Settings”

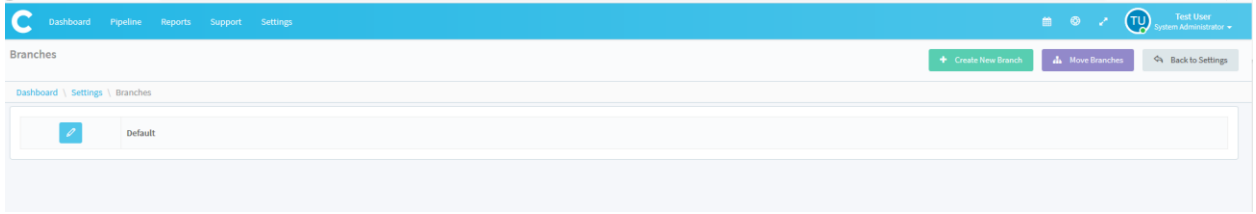


### 8. Click on “Manage Company” at the top right screen to setup company licenses, update company info etc...

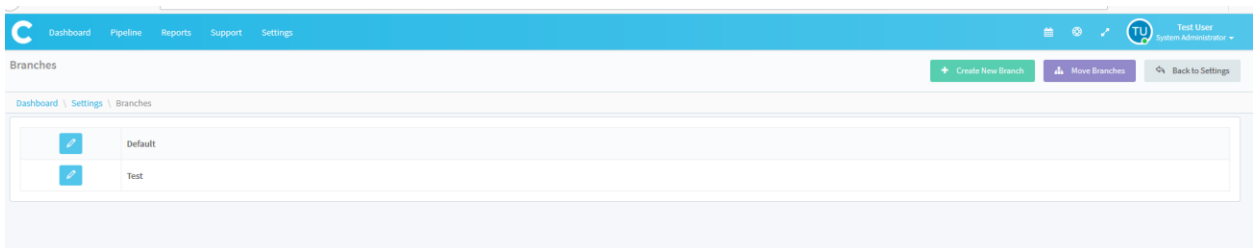
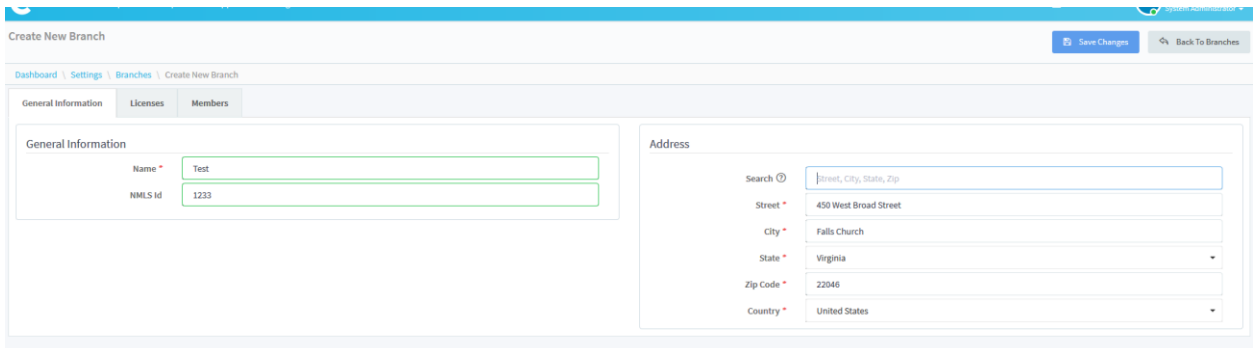


## How to add a branch if broker has multiple branches?

### 9. Click on the “Branches” section under “Settings” then click on “Create New Branch” button to create a new branch (NOTE: Company always had a default branch which is created by system)

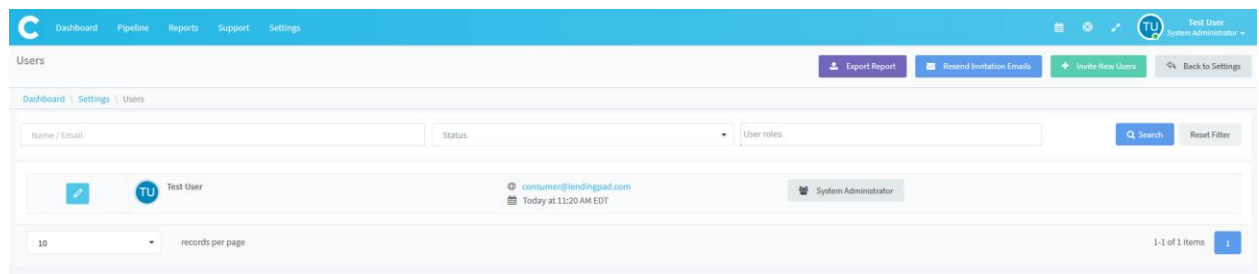


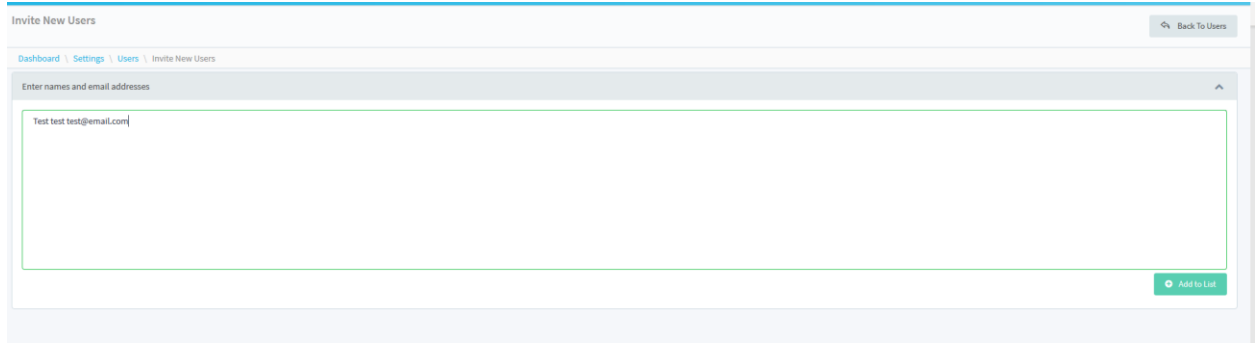
10. Input all the required info and click on “Save Changes”



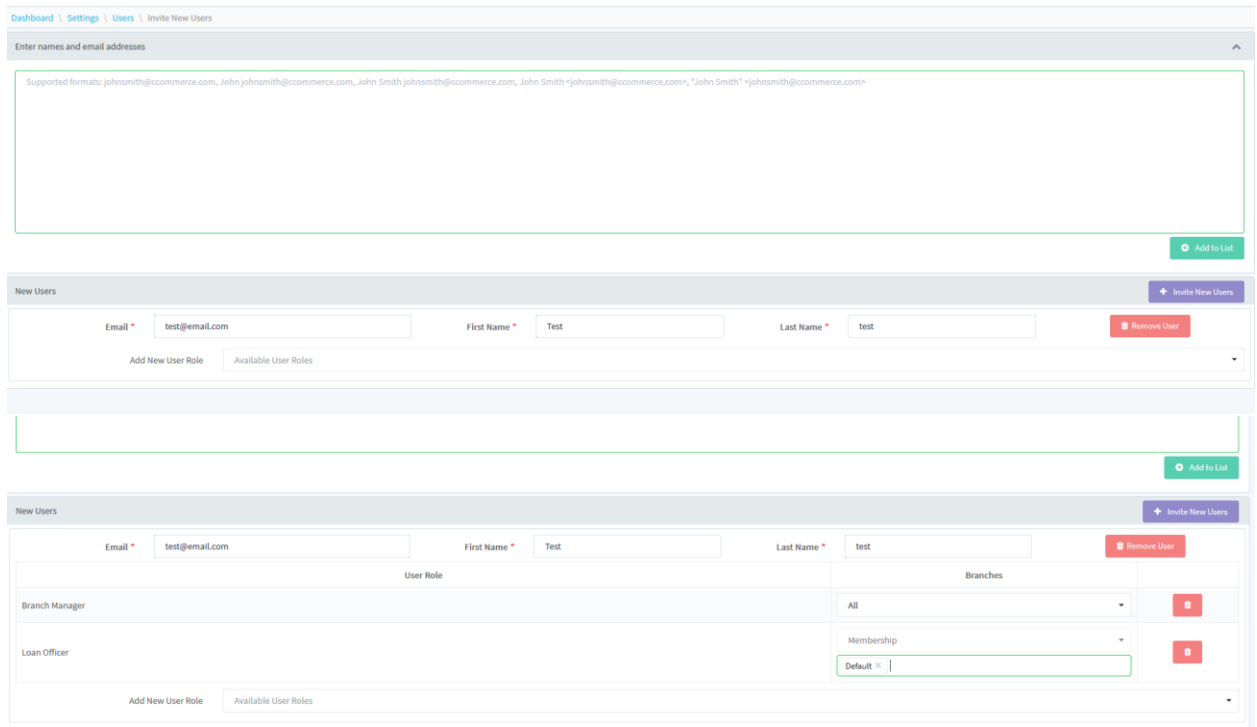
## How to add new users?

11. Click on the “Users” section under “Settings” then click on “Invite New Users” button and input the first, last name and email address to add a new user

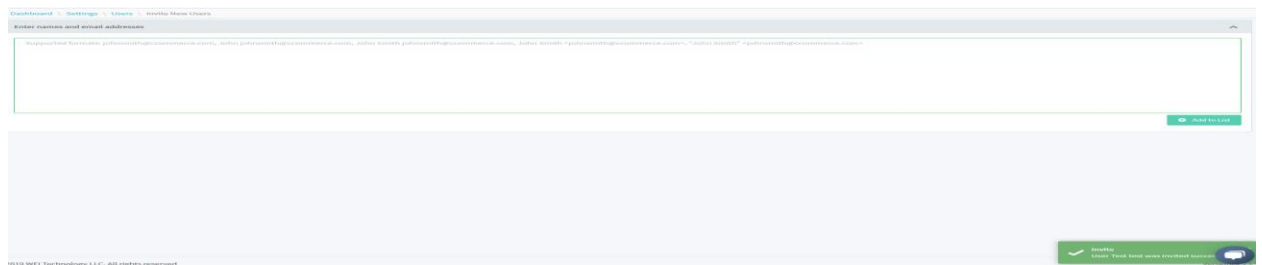




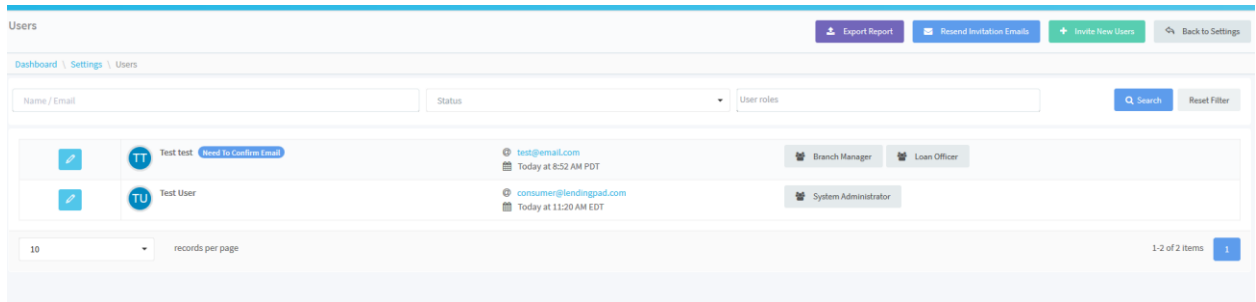
- Click on “Add to List” then select the user role under the “Add New User Role” drop down and define the user branch access



- Click on “Invite New Users” button



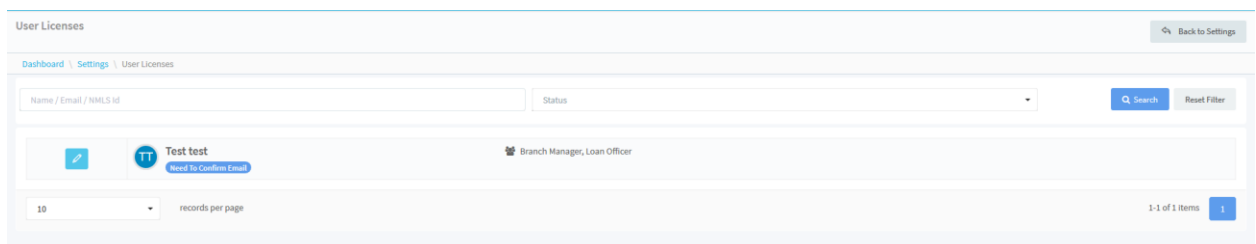




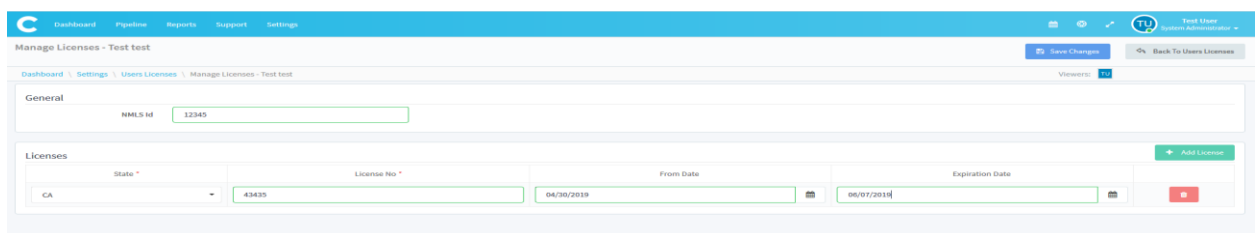
System admin can resend the invitations by clicking on the “Resend Invitation Emails” button.

## How to add user’s MLO licenses?

14. Click on the “User Licenses” section under “Settings”

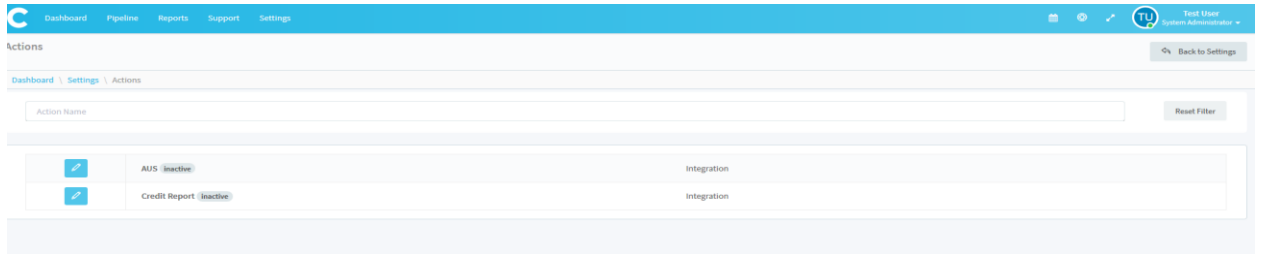


15. Click on pencil icon with the “Username” then input the NMLS ID and state licenses and click on “Save Changes”

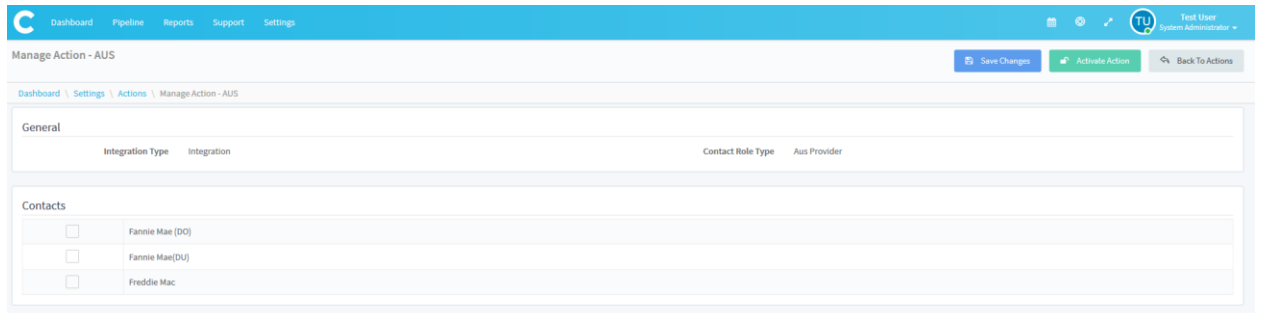


## How to activate system actions (credit report, AUS)?

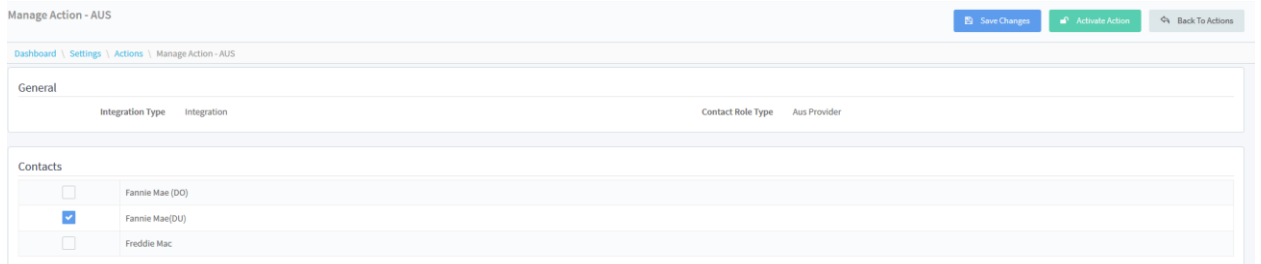
16. Click on the “Actions” button under “Settings”



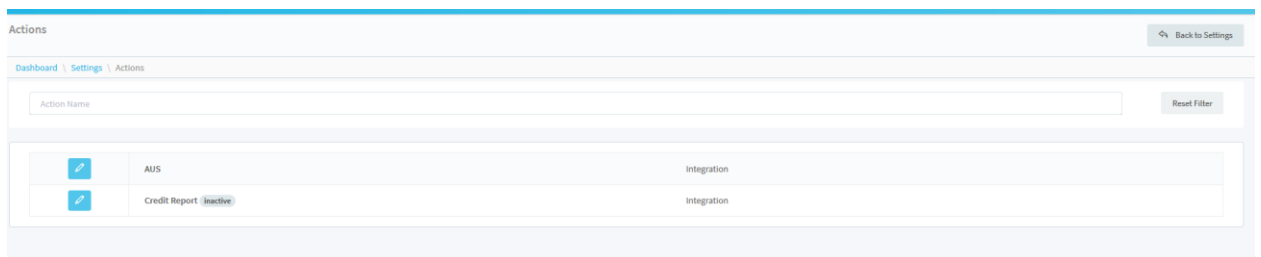
17. Click on pencil icon with “AUS” to activate the “Fannie Mae”



18. Select “Fannie Mae”, click on “Save Changes” then go back and click on the “Activate Action”



19. Click on pencil icon with “Credit Report” to activate the credit report action



20. Select the “Credit Provider”, input the credentials and click on “Save Changes” then go back and click on the “Activate Action”

Manage Action - Credit Report Save Changes Activate Action Back To Actions

Dashboard > Settings > Actions > Manage Action - Credit Report

**General**

Integration Type	Integration	Contact Role Type	Credit Report Vendor
------------------	-------------	-------------------	----------------------

**Contacts** Company Set Credentials Source Type To All Contacts

<input type="checkbox"/>	Accurate Financial Services <span>edit</span>		
<input checked="" type="checkbox"/>	Advantage Credit	Credentials Source Type * Company	
		Username *	••
		Password *	••
<input type="checkbox"/>	Advantage Plus Credit		
<input type="checkbox"/>	Alliance 2020		

**NOTE: Please do not modify other areas of the system**