
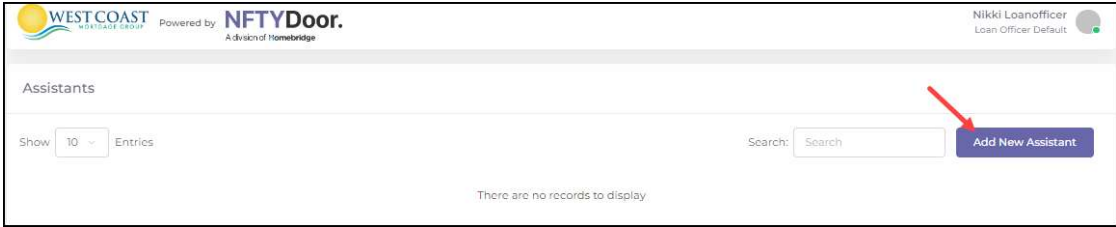
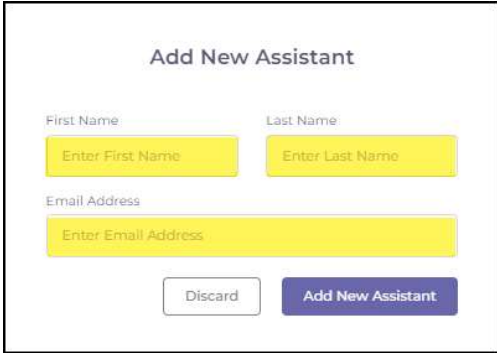
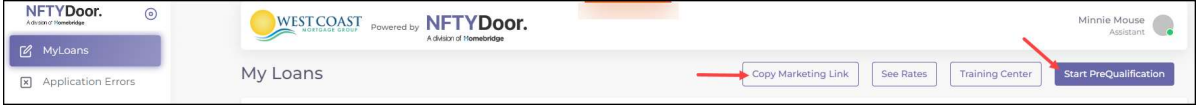



Adding A New Assistant

Step	Action
1.	Navigate to your MLO Portal or you can SSO if your company uses a different login platform
2.	<p>On the left-hand side, click Assistants</p> 
3.	<p>Click Add New Assistant</p> 
4.	<p>Enter First Name, Last Name, and the assistant's Email Address (Note: Duplicate email address not allowed)</p> 

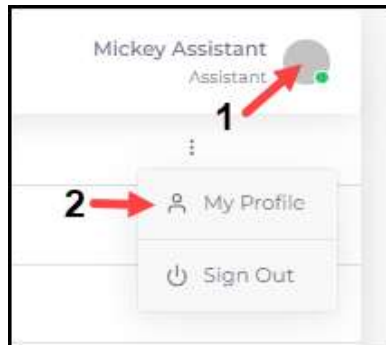
Step	Action
5.	<p>Click Add New Assistant</p> <div data-bbox="529 388 1214 871" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Add New Assistant</p> <p>First Name: <input type="text" value="Mickey"/> Last Name: <input type="text" value="Assistant"/></p> <p>Email Address: <input type="text" value="gassexicreutta-6968@yopmail.com"/></p> <p><input type="button" value="Discard"/> <input type="button" value="Add New Assistant"/></p> </div>
6.	<p>An email is sent to the Loan Officer Assistant to create the account The email will come from support@nftydoor.com</p> <div data-bbox="328 1031 1414 1493" style="border: 1px solid black; padding: 10px;"> <p>Welcome to the NFTYDoor Assistant Portal! <support@nftydoor.com> Wednesday, July 10, 2024 11:36:00 AM</p> <p>NFTYDoor.</p> <p>Hello Mickey Assistant!</p> <p>We're excited to support your HELOC business and are inviting you to our portal. Here you will be able to see all loans in process by Nikki Loanofficer.</p> <p>Here is how it works:</p> <ul style="list-style-type: none"> • Click here to sign up for your Assistant Portal • See all loans in process by the LO who invited you <p>If you have questions along the way, you can always contact us anytime.</p> <p>Your friends at NFTYDoor</p> <p>© Homebridge Financial Services Inc. Home Equity by NFTYDoor a Division of Homebridge NMLS 6521 Terms of service Privacy Policy Licenses Unsubscribe Equal Housing Opportunity</p> </div>
7.	<p>Click the link Assistant Portal</p> <div data-bbox="487 1570 1260 1711" style="border: 1px solid black; padding: 10px;"> <p>Here is how it works:</p> <ul style="list-style-type: none"> • Click here to sign up for your Assistant Portal • See all loans in process by the LO who invited you </div>

Step	Action
<p>8.</p>	<p>Create a password and confirm Click Sign up</p> <div data-bbox="623 426 1118 1230" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p style="text-align: center;">NFTYDoor. A division of Homebridge</p> <p style="text-align: center;">Hi Mickey! Choose a password to get started!</p> <p>Email</p> <input type="text" value="gassoxicroutha-6968@yopmail.com"/> <p>Create Password</p> <input type="password" value=""/> <p>Minimum length is 9 characters with at least 1 number, 1 special character, 1 uppercase letter and 1 lowercase letter.</p> <p>Confirm password</p> <input type="password" value=""/> <p>Minimum length is 9 characters with at least 1 number, 1 special character, 1 uppercase letter and 1 lowercase letter.</p> <p style="text-align: center;">Sign up</p> <p style="text-align: center;">If you're already a member, login here.</p> </div>
<p>9.</p>	<p>Once in their portal, the assistant will be able to use the Copy Marketing Link function and utilize the Start PreQual button</p> <div data-bbox="277 1388 1466 1493" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 90%;">  </div> <p>NOTE: The Copy Marketing Link button will be the link for the Loan Officer's prequal application</p>

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<p>10.</p>	<p>The Loan Officer Assistant will be able to open and view loans in the My Loans tab</p> <div data-bbox="376 386 1365 814" style="border: 1px solid black; padding: 5px;"> <p>My Loans Copy Marketing Link See Rates Training Center Start PreQualification</p> <p>Stages</p> <table border="1"> <thead> <tr> <th>STAGE NAME</th> <th>#</th> <th>\$</th> <th>DAYS</th> </tr> </thead> <tbody> <tr> <td>PreQual</td> <td>3843</td> <td>\$448.09m</td> <td>155.36</td> </tr> <tr> <td>Respond to new lead</td> <td>404</td> <td>\$0.00</td> <td>76.03</td> </tr> <tr> <td>Submit application</td> <td>2792</td> <td>\$345.59m</td> <td>177.84</td> </tr> <tr> <td>Fix ID typos</td> <td>23</td> <td>\$2.88m</td> <td>139.73</td> </tr> <tr> <td>Unfreeze credit</td> <td>1</td> <td>\$0.10m</td> <td>11.00</td> </tr> <tr> <td>Unblock credit</td> <td>0</td> <td>\$0.00</td> <td>0.00</td> </tr> <tr> <td>Check SSN</td> <td>6</td> <td>\$0.67m</td> <td>6.17</td> </tr> <tr> <td>Confirm no mortgage</td> <td>7</td> <td>\$0.91m</td> <td>177.57</td> </tr> <tr> <td>Confirm multiple loans</td> <td>2</td> <td>\$0.35m</td> <td>147.50</td> </tr> <tr> <td>Ops: Call to clear Fraud Alert</td> <td>1</td> <td>\$0.10m</td> <td>7.00</td> </tr> <tr> <td>CLTV Too High</td> <td>15</td> <td>\$2.74m</td> <td>40.40</td> </tr> <tr> <td>Call borrower to accept offer (BPO)</td> <td>91</td> <td>\$14.72m</td> <td>161.44</td> </tr> <tr> <td>Call borrower to accept offer (AVM)</td> <td>501</td> <td>\$80.03m</td> <td>99.21</td> </tr> </tbody> </table> </div>	STAGE NAME	#	\$	DAYS	PreQual	3843	\$448.09m	155.36	Respond to new lead	404	\$0.00	76.03	Submit application	2792	\$345.59m	177.84	Fix ID typos	23	\$2.88m	139.73	Unfreeze credit	1	\$0.10m	11.00	Unblock credit	0	\$0.00	0.00	Check SSN	6	\$0.67m	6.17	Confirm no mortgage	7	\$0.91m	177.57	Confirm multiple loans	2	\$0.35m	147.50	Ops: Call to clear Fraud Alert	1	\$0.10m	7.00	CLTV Too High	15	\$2.74m	40.40	Call borrower to accept offer (BPO)	91	\$14.72m	161.44	Call borrower to accept offer (AVM)	501	\$80.03m	99.21				
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Editing Assistant Profile

- 12.** Their profile picture can be added/updated
1. Click on the grey circle
 2. Click **My Profile**



- 13.** Click **Upload**



NOTE: The photo must be in a JPG, GIF or PNG format. The max size is 4MB