Gmail by Google

Mike Porter <mporter@rdhloans.com>

Re: Setting up our users

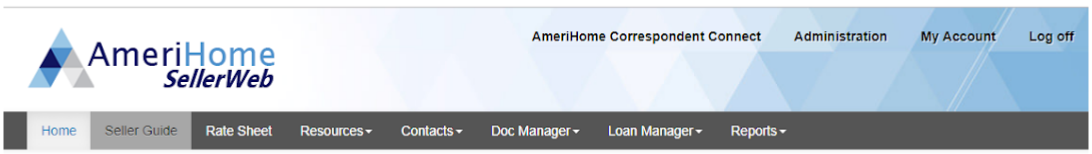
1 message

Loren Lopez <loren.lopez@amerihome.com> Wed, Aug 7, 2019 at 9:12 AM
To: Mike Porter <mporter@rdhloans.com>
Cc: Mitchell Kaufman <client.support@amerihome.com>, Michael Wooten <michael.wooten@amerihome.com>

Hello Mike,

As I mentioned during our Welcome Call, I am happy to assist and create the login accounts to either of our operational sites referenced below. For your convenience, this information can be filled out and provided back by using the "Contacts" sheet attached.

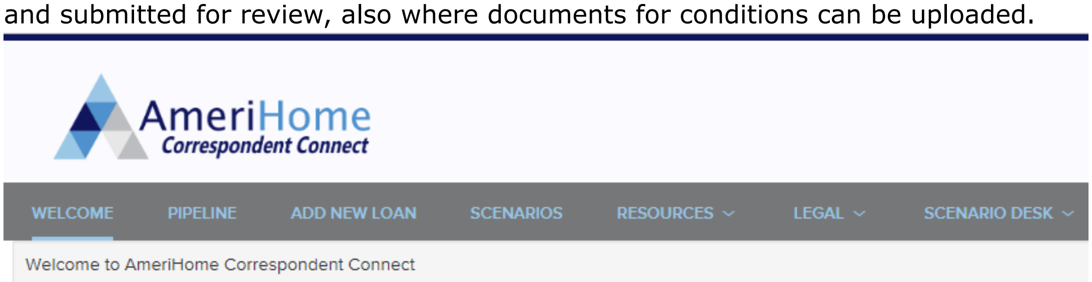
Seller WEB -- https://sellerweb.amerihome.com/ - this is the system of information and reporting. You can view guidelines, program guides, view conditions and purchase advice items in BULK and current rates.



Sellerweb User Roles Available:

□ **User** (default): Access to all information tabs on SellerWeb (Seller Guide, Resources, Contacts tabs)
□ **Admin**: Access to ALL role functions. Ability to manage users (add/add bulk, delete, edit)
□ **Assistant Admin**: Same access as Admin except cannot delete other Admin users
□ **Rate Sheets**: Access to the current Rate Sheets and Pricing
□ **Doc Manager**: Access to the Purchase Advise Letters and Post Purchase document uploads
□ **Loan Manager**: Access to view a live list of loans needing loan payment histories
□ **Reports**: Access to outstanding pre-purchase Pending Conditions

Correspondent Connect -- https://connect.amerihome.com - This is where files will be registered, locked and submitted for review, also where documents for conditions can be uploaded.



Correspondent Connect Persona Roles Available

□ **Admin**: Access to ALL role functions. Ability to manage users (authorize Client Support to add, delete or edit user accounts)
□ **View Only**: View loans, view purchase advice
□ **Shipper**: View loans, view purchase advice, Submit files for review, View Conditions & Upload Documents
□ **Shipper W/out PA**: View loans, Submit files for review, View Conditions & Upload Documents
□ **Secondary**: View loans, view purchase advice, Submit files for review, View Conditions & Upload Documents, Register Loans

We offer also three different types of auto-notifications that your team can be set up for, to assist in monitoring your pipeline items. See below:

FUNDING -- purchase advice released
PENDING CONDITIONS -- purchase review conditions status
COMMITMENT-- locks expiring notice.

Feel free to reply with your team members name, email address and which type of access & notification will be needed. We are looking forward to hearing back from you.

Thank you kindly!

Have a pleasant and productive day!

Loren Lopez / Client Support Specialist

client.support@amerihome.com
Direct - 747-226-2061
Main - 747-242-3799
My office hours are Monday - Friday from 6:00 am to 2:30 pm Pacific Time

AmeriHome Mortgage Company, LLC
1 Baxter Way, Suite 300
Thousand Oaks, CA 91362-3888
Main Number - 747-800-4220 or Toll-Free- 888-469-0810
Amerihome.com NMLS ID 135776

My goal is to respond to all inquiries within 2 hours from receipt of the email. If you have not received a response within this time frame, or if you need immediate assistance please contact: **Rashmi Gulrajani, Email** rashmi.gulrajani@amerihome.com **//** 747-226-2507 **- Direct**

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On Wed, Aug 7, 2019 at 6:28 AM Michael Wooten <michael.wooten@amerihome.com> wrote:

> Client Support,
>
> Mike had some questions about what is LO's will have access to in Correspondent Connect. Can we reach out to help him setup the system?
>
> I advised that Shipper w/o PA would probably be best for an LO because they can view loans, submit files and view/upload conditions but I also want them to have access to run scenarios, register and lock loans.

Personas and Permissions

Persona	Permissions
View Only	View Loans View Purchase Advice
Shipper w/o PA	View Loans Submit Loan Files View Conditions & Upload Documents
Shipper	View Loans Submit Loan Files View Conditions & Upload Documents View Purchase Advice
Secondary Marketing	View Loans View Purchase Advice Submit Loan Files View Conditions & Upload Documents Register Loans Access Company Information Tab Run Scenarios View Lock History
Admin	View Loans View Purchase Advice Submit Loan Files View Conditions & Upload Documents Register Loans Access Company Information Tab Run Scenarios View Lock History Create New Users / Manage User's Info & Personas

Michael Wooten

Sales Account Executive
Direct #: 214-983-0380
Cell #: 817-832-1867
michael.wooten@amerihome.com

AmeriHome Mortgage Company ,LLC
122 W. John Carpenter Frwy, Suite 200
Irving, TX 75039
Main Number #: 888-469-0810

AmeriHome mortgage

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On Wed, Aug 7, 2019 at 8:09 AM Mike Porter <mporter@rdhloans.com> wrote:

> Thanks for this. We typically do set up the Loan Officers in the investor's system so they can view conditions keep track of the progress of the loan. Since the systems don't talk with one another the sales team, myself included are in

the dark about specific underwriting conditions.

Is there a category for that? I used View Only with scenarios....that sounded okay but not really sure.

I'd rather they not see the purchase advice because I put a small pricing holdback in the price for now. I'll probably remove that at some point. If I give the LO's access I'm sure they can see the lock info so my plan of holding back a little won't really work.

Call anytime.

Thanks,

Mike Porter
President, , RMLO # 978561
Red Diamond Home Loans, NMLS# 1325498
165 S. Kimball Avenue, Suite 100, Southlake, TX 76092
C: 817-832-8452 | O: 817-756-1555 |
Recruiting Site | Apply Here | Set Calendar Appointment |
Email: mporter@rdhloans.com | Red Diamond Website |

RED DIAMOND
HOME LOANS

| Google Reviews | Facebook Recommendations |

On Tue, Aug 6, 2019 at 6:02 PM Michael Wooten <michael.wooten@amerihome.com> wrote:

Mike,

Below are what access each Persona has. Lets talk in the morning to get everything set up correctly.

Correspondent Connect Persona Roles Available

- **Admin**: Access to ALL role functions. Ability to manage users (authorize Client Support to add, delete or edit user accounts)
- **View Only**: View loans, view purchase advice
- **Shipper:** View loans, view purchase advice, Submit files for review, View Conditions & Upload Documents
- **Shipper W/out PA:** View loans, Submit files for review, View Conditions & Upload Documents
- **Secondary**: View loans, view purchase advice, Submit files for review, View Conditions & Upload Documents, Register Loans

Michael Wooten

Sales Account Executive
Direct #: 214-983-0380

Cell #: 817-832-1867
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AmeriHome mortgage

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On Tue, Aug 6, 2019 at 5:43 PM Mike Porter <mporter@rdhloans.com> wrote:

I do have a question about setting up our users. The Persona's are not totally clear in the system.

I've set them up but want to make sure I did it correctly.

Have someone reach out anytime tomorrow or so.

Thanks,

Mike Porter
President, , RMLO # 978561
Red Diamond Home Loans, NMLS# 1325498
165 S. Kimball Avenue, Suite 100, Southlake, TX 76092
C: 817-832-8452 | O: 817-756-1555 |
Recruiting Site | Apply Here | Set Calendar Appointment |
Email: mporter@rdhloans.com | Red Diamond Website |

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New Client Contact and User Form.xlsx
12K