



Blueprint for Brokers User Administration Guide

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The Blueprint for Brokers Portal is an exclusive platform that makes it even easier to do business with Newrez. This training manual will provide guidance to admins on how to utilize the **Manage Team** tab within the portal.

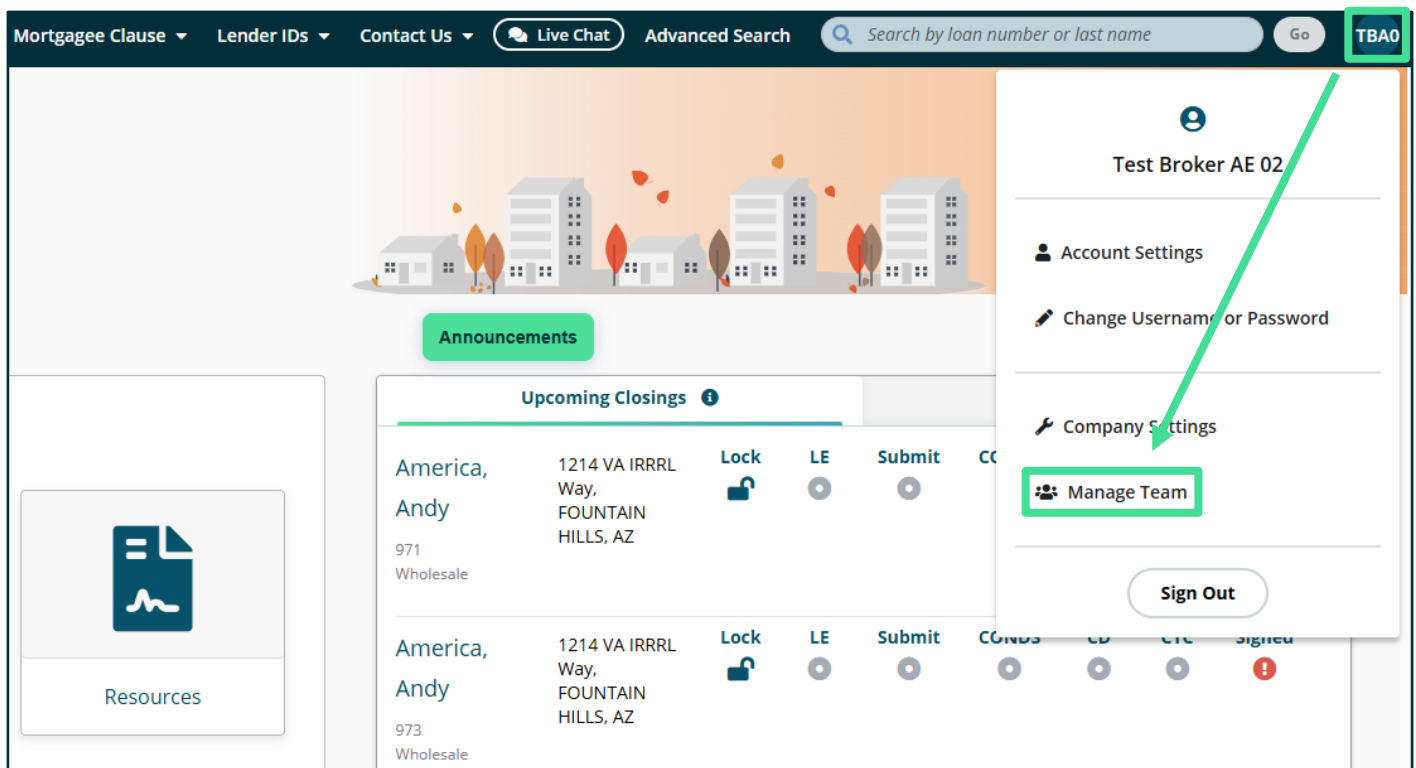


The **Manage Team** tab will allow you to:

- [Save time when adding new employees.](#)
- [Efficiently manage existing employee profiles.](#)

Manage Team

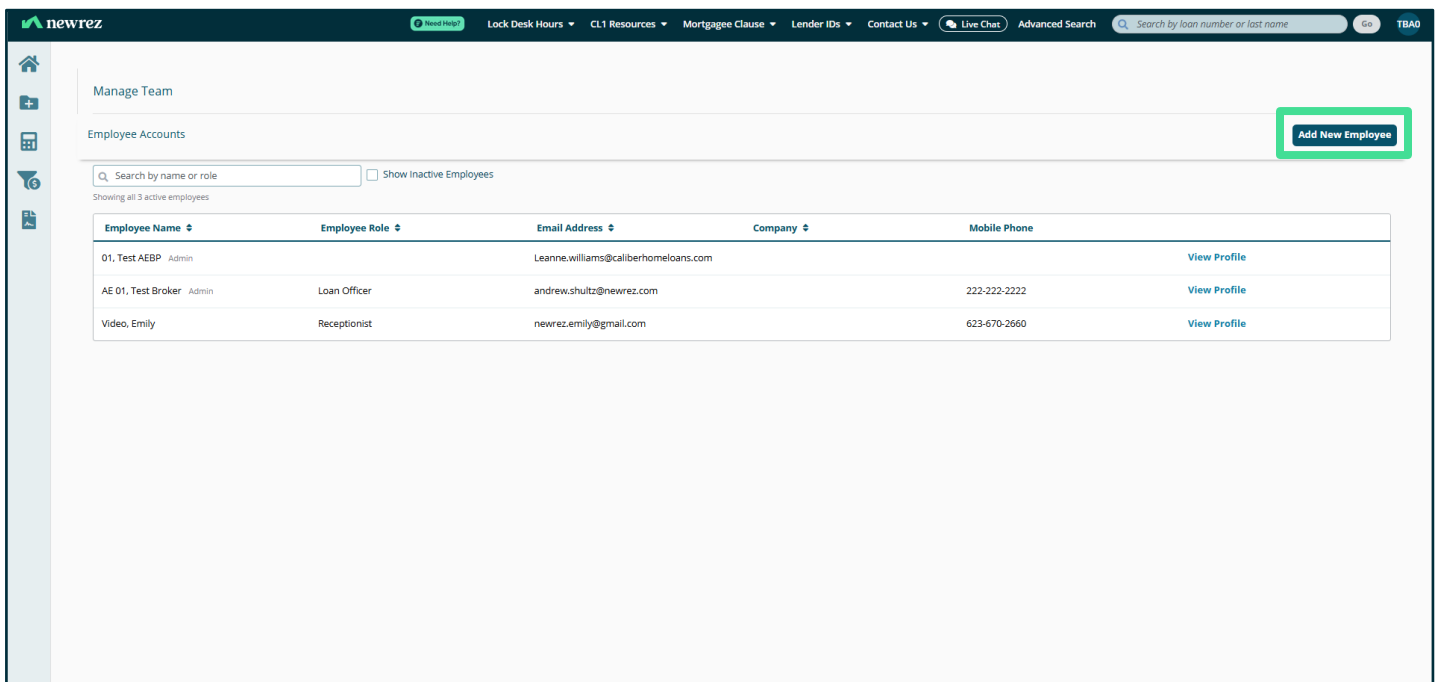
- Adding new employees, or making edits to existing employees, can be done by accessing the **Manage Team** tab from the upper right hand side navigation menu.



Manage Team: Add New Employee

- Admin(s) can add new employees to the Blueprint for Brokers Portal by using the **Add New Employee** button within the **Manage Team** tab.

1 Click Add New Employee



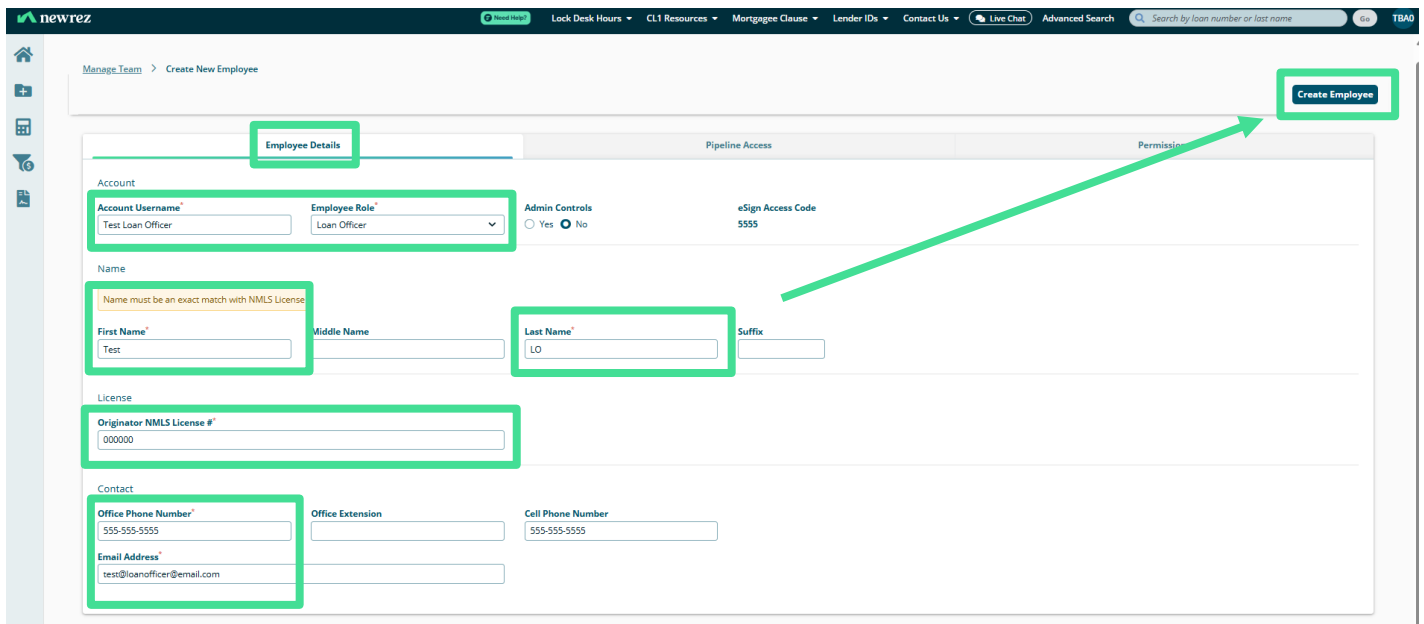
The screenshot shows the Newrez Manage Team interface. The top navigation bar includes links for 'Need Help?', 'Lock Desk Hours', 'CL1 Resources', 'Mortgagee Clause', 'Lender IDs', 'Contact Us', 'Live Chat', 'Advanced Search', and a search bar. The left sidebar contains icons for Home, Add, Calendar, and a list of employees. The main content area is titled 'Manage Team' and 'Employee Accounts'. A search bar with the placeholder 'Search by name or role' and a checkbox for 'Show Inactive Employees' is present. Below the search bar, a table lists three active employees: '01, Test AEBP Admin', 'AE 01, Test Broker Admin', and 'Video, Emily'. Each row includes columns for Employee Name, Employee Role, Email Address, Company, and Mobile Phone, along with a 'View Profile' link. The 'Add New Employee' button is highlighted with a green box in the top right corner of the main content area.

Employee Name	Employee Role	Email Address	Company	Mobile Phone	
01, Test AEBP Admin		Leanne.williams@caliberhomeloans.com			View Profile
AE 01, Test Broker Admin	Loan Officer	andrew.shultz@newrez.com		222-222-2222	View Profile
Video, Emily	Receptionist	newrez.emily@gmail.com		623-670-2660	View Profile

Manage Team: Add New Employee

2 Complete required fields on Employee Details Tab

- Required fields are identified with a red * asterisk.
- Name must be an exact match with NMLS License.
- Click **Create Employee** once all required fields are completed. (Optional)

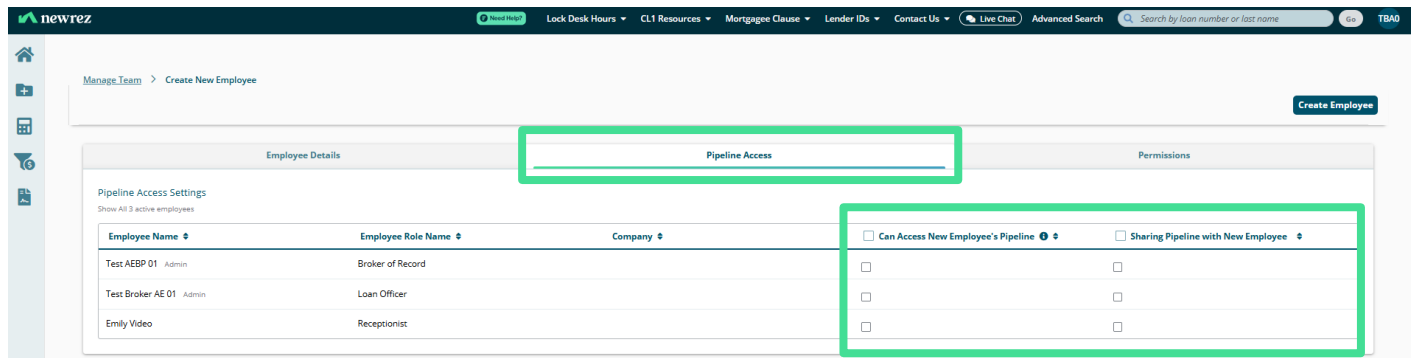


Manage Team: Grant Pipeline Access

Step

3 Grant Pipeline Access (optional)

- Can Access New Employee's Pipeline or Sharing Pipeline with New Employee.



The screenshot shows the 'Create New Employee' form in the NewRez system. The 'Pipeline Access' tab is selected. Under 'Pipeline Access Settings', there is a table with the following data:

Employee Name	Employee Role Name	Company
Test AEBP 01	Admin	Broker of Record
Test Broker AE 01	Admin	Loan Officer
Emily Video		Receptionist

To the right of the table, there are two checkboxes:

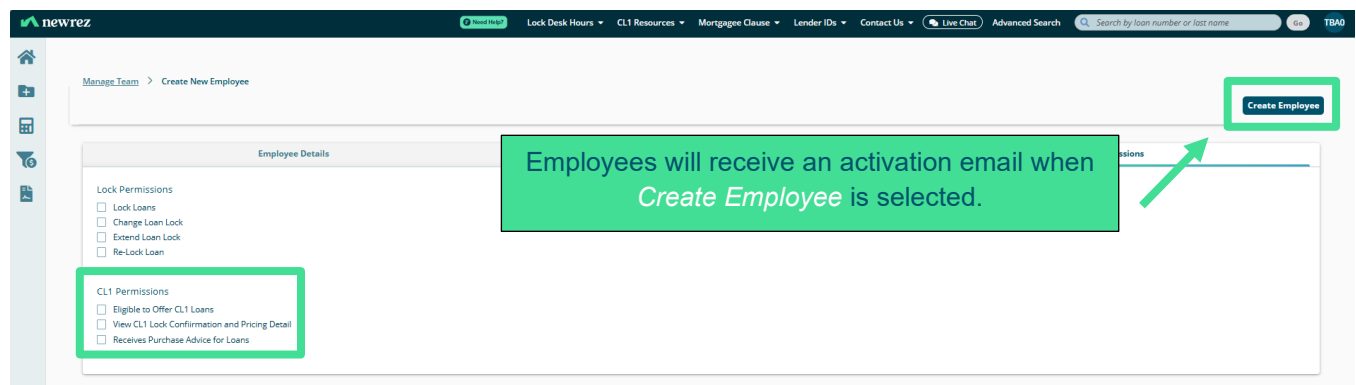
- ☐ Can Access New Employee's Pipeline
- ☐ Sharing Pipeline with New Employee

Manage Team: Grant Permissions

Step

4 Grant Permissions (optional)

- CL1 Permissions appear only when applicable.



The screenshot shows the 'Create New Employee' form in the NewRez system. The 'Employee Details' tab is selected. Under 'Lock Permissions', there are four checkboxes:

- ☐ Lock Loans
- ☐ Change Loan Lock
- ☐ Extend Loan Lock
- ☐ Re-Lock Loan

Under 'CL1 Permissions', there are three checkboxes:

- ☐ Eligible to Offer CL1 Loans
- ☐ View CL1 Lock Confirmation and Pricing Detail
- ☐ Receives Purchase Advice for Loans

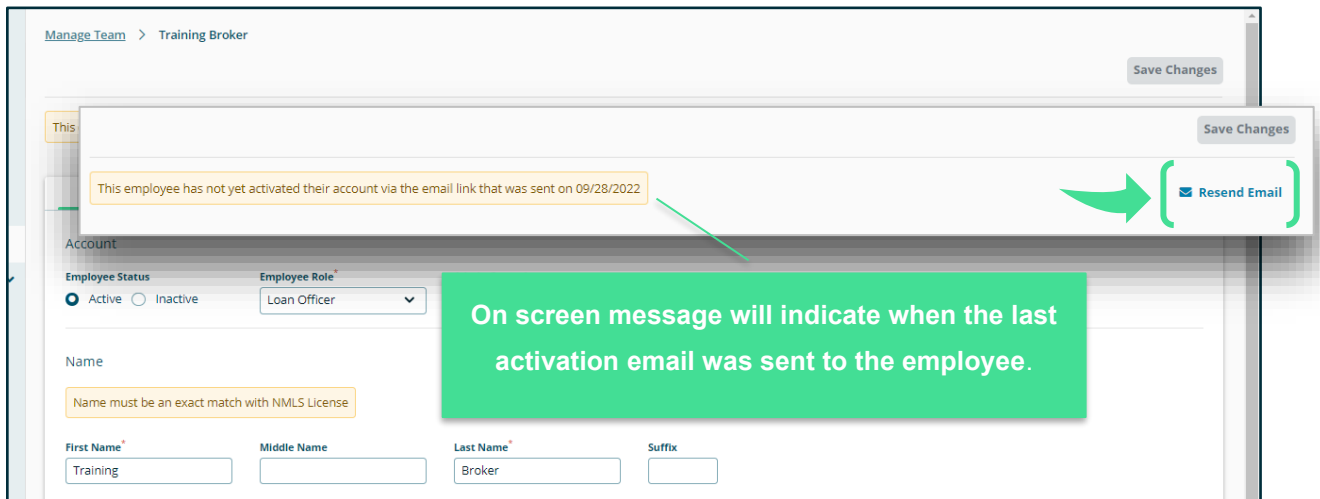
A green callout box states: "Employees will receive an activation email when *Create Employee* is selected." An arrow points to the 'Create Employee' button.

Manage Team: Resend Email

Step

5 Resend Email (optional)

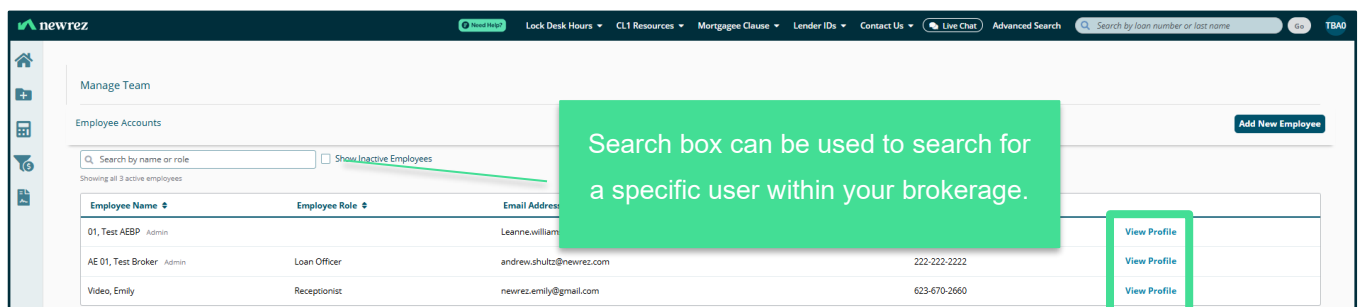
- Admin(s) can resend activation emails from users' profile screen of the **Manage Team** menu.



Manage Team: View Profile



Under the **View Profile** link, admins can make edits to employee profiles without going into H2O.



Manage Team: View Profile



The view profile screen is broken into five tabs that admins can utilize to make changes for existing employees.



Employee Details

Allows admins to make edits to employee status, NMLS license info, and contact information.



Pipeline Access

Provides the ability to allow someone else access to their pipeline, and gain access to another employee's pipeline.



Credit Vendor Credentials

Enter the credit provider credentials for the providers utilized within your brokerage.



Permissions

Can toggle lock and CL1 permissions (if applicable)



Notifications

Establish LSN notifications for each individual user.

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
Account Employee Status ☒ Active ☐ Inactive Employee Role* Loan Officer Admin Controls ☐ Yes ☒ No Name Name must be an exact match with NMLS License First Name* Training Middle Name Last Name* Broker Suffix License Originator NMLS License #* 8675309 Contact Office Phone Number* (214) 555-1212 Office Extension Cell Phone Number (214) 555-5555 Email Address* training.broker@newrez.com				

Manage Team: Employee Details



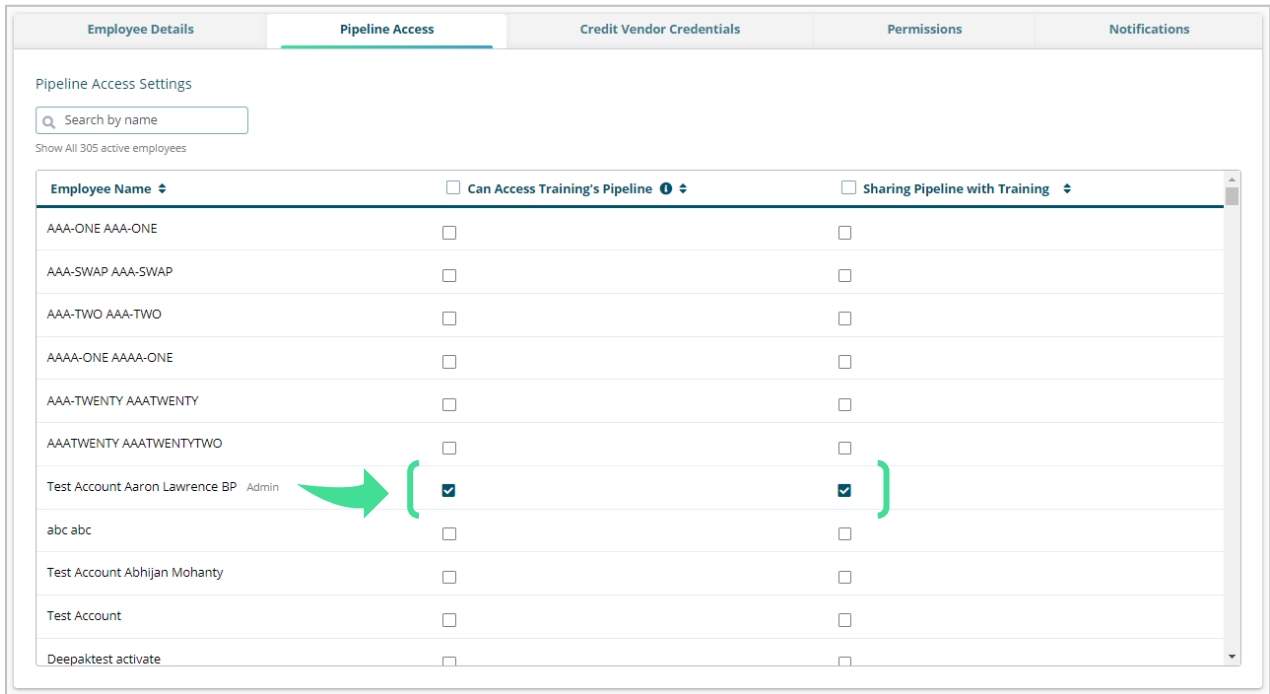
The **Employee Details** tab allows for admins to enter contact information for each employee. Admins also can set an employee as Active/Inactive and grant Admin Controls.

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
Account Employee Status ☒ Active ☐ Inactive Employee Role* Loan Officer Admin Controls ☐ Yes ☒ No				
Name Name must be an exact match with NMLS License First Name* Training Middle Name Last Name* Broker Suffix Name must be an exact match with NMLS License.				
License Originator NMLS License #* 8675309				
Contact Office Phone Number* (214) 555-1212 Office Extension Cell Phone Number (214) 555-5555 Email Address* training.broker@newrez.com				

Manage Team: Pipeline Access



Pipeline Access allows for admins to determine who can share a pipeline, and who can see the pipeline, for each individual user.

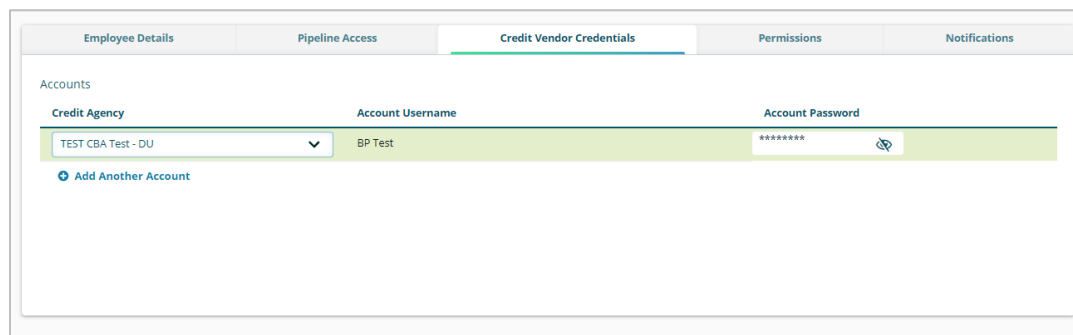


Employee Name	Can Access Training's Pipeline	Sharing Pipeline with Training
AAA-ONE AAA-ONE	☐	☐
AAA-SWAP AAA-SWAP	☐	☐
AAA-TWO AAA-TWO	☐	☐
AAAA-ONE AAAA-ONE	☐	☐
AAA-TWENTY AAATWENTY	☐	☐
AAATWENTY AAATWENTYTWO	☐	☐
Test Account Aaron Lawrence BP Admin	☒	☒
abc abc	☐	☐
Test Account Abhijan Mohanty	☐	☐
Test Account	☐	☐
Deepaktest activate	☐	☐

Manage Team: Credit Vendor Credentials



Credit Vendor Credentials tab allows admins to store credentials for all approved credit vendors in your brokerage.



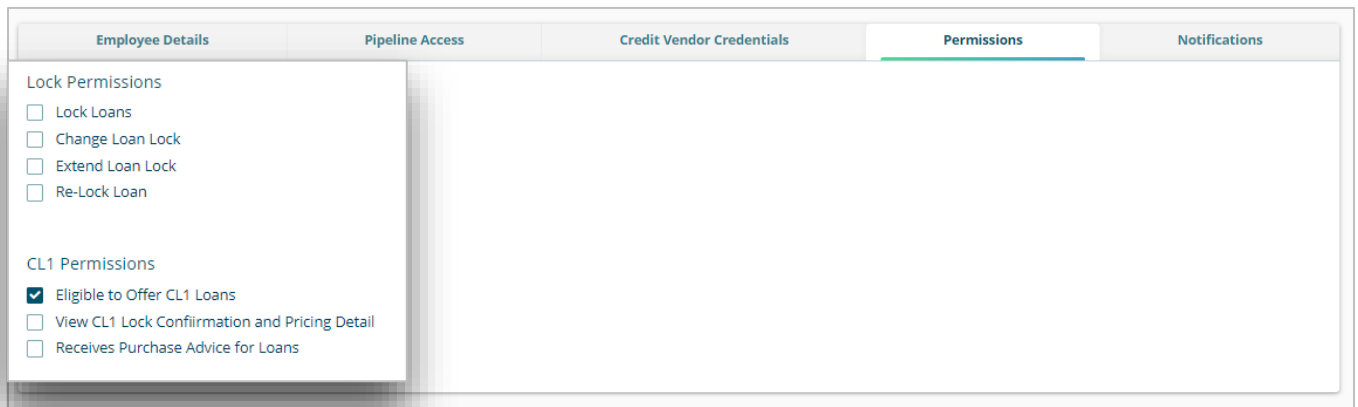
Credit Agency	Account Username	Account Password
TEST CBA Test - DU	BP Test	*****

[Add Another Account](#)

Manage Team: Permissions



Permissions tab allows for admin(s) to determine Lock Permissions and CL1 Permissions – if applicable – for each employee.

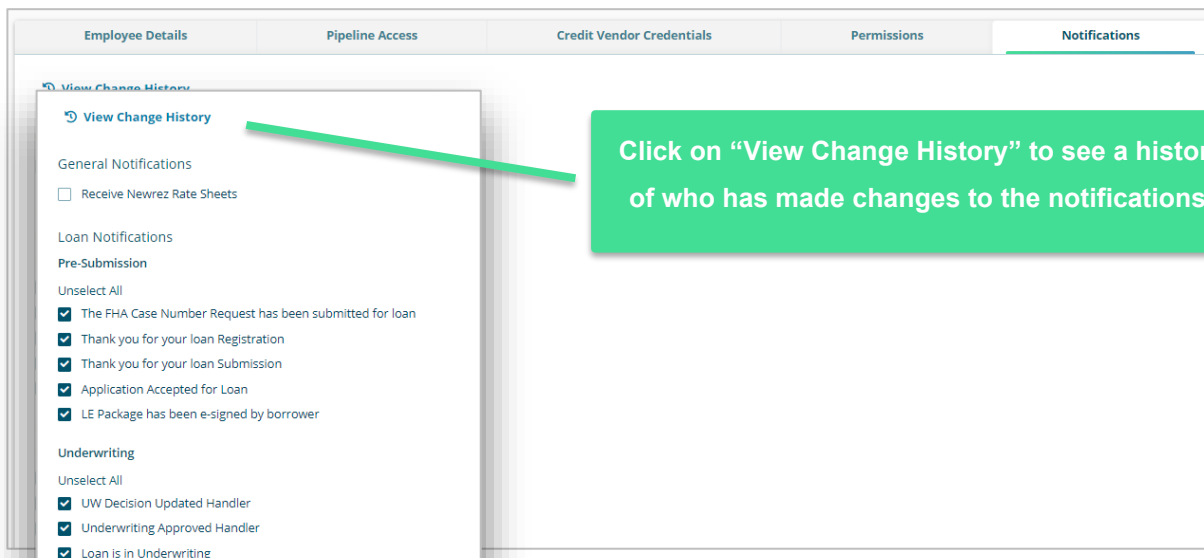


The screenshot shows the 'Permissions' tab in the Manage Team interface. It features a sidebar with two sections: 'Lock Permissions' and 'CL1 Permissions'. The 'Lock Permissions' section includes four checkboxes: 'Lock Loans', 'Change Loan Lock', 'Extend Loan Lock', and 'Re-Lock Loan'. The 'CL1 Permissions' section includes three checkboxes: 'Eligible to Offer CL1 Loans' (which is checked), 'View CL1 Lock Confirmation and Pricing Detail', and 'Receives Purchase Advice for Loans'. The main content area is currently empty.

Manage Team: Notifications



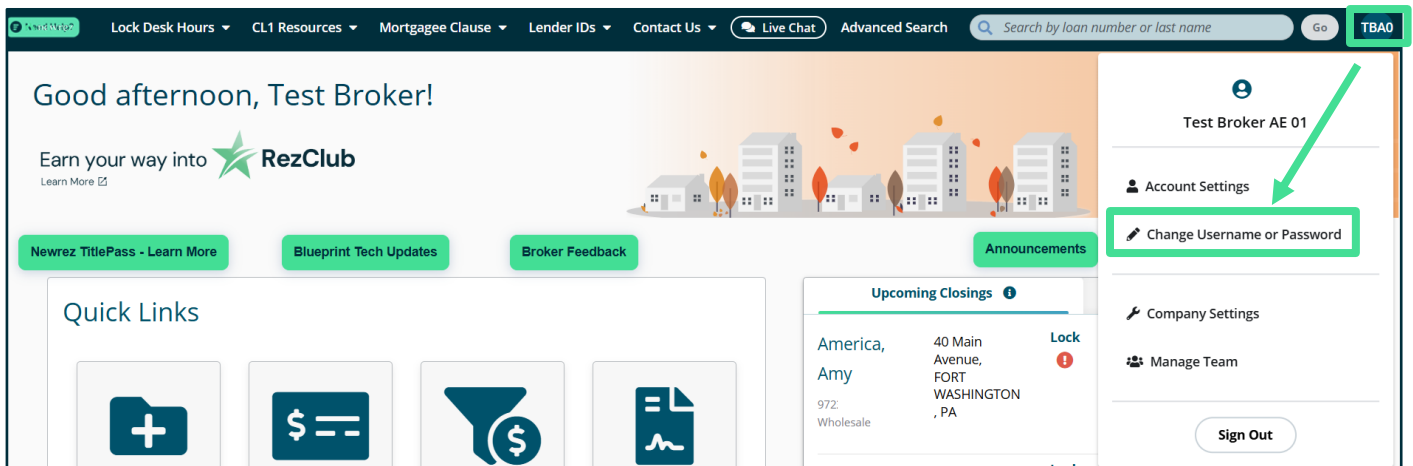
The **Notifications** tab allows admins to set loan status notifications for Pre-Submission, Underwriting, Appraisal, Closing & Funding, and CL1 (if applicable), loan stages.



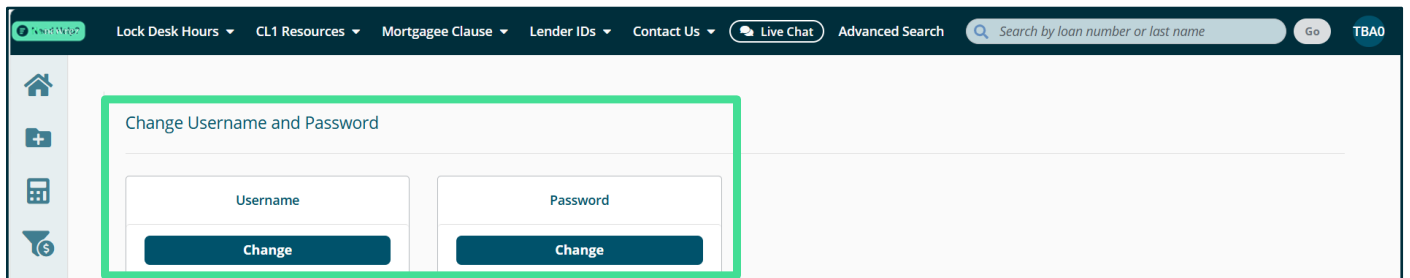
The screenshot shows the 'Notifications' tab in the Manage Team interface. It features a sidebar with a 'View Change History' link at the top. Below this, there are three sections: 'General Notifications' with one checkbox 'Receive Newrez Rate Sheets'; 'Loan Notifications' with a 'Pre-Submission' sub-section containing five checked checkboxes: 'The FHA Case Number Request has been submitted for loan', 'Thank you for your loan Registration', 'Thank you for your loan Submission', 'Application Accepted for Loan', and 'LE Package has been e-signed by borrower'; and an 'Underwriting' sub-section containing three checked checkboxes: 'UW Decision Updated Handler', 'Underwriting Approved Handler', and 'Loan is in Underwriting'. A green callout box with a green arrow pointing to the 'View Change History' link contains the text: 'Click on “View Change History” to see a history of who has made changes to the notifications.'

Change Username or Password

- This is done by the Individual User not an Admin in the Manage Team Flow.



1 Click Change to update either the Username or Password



2 Make updates then select Save Changes.

Change Username

Cancel

Save Changes

Current Username

Training.bp.01

New Username

Must be at least 8 characters long

You may use lowercase, uppercase, numbers or these special characters: @ , _ , - , .

Change Password

Save Changes

Current Password*

New Password*

Confirm New Password*

At least 8 characters long

1 or more lowercase letters

1 or more uppercase letters

1 or more numbers

1 or more special characters