BROKER PORTAL: MANAGE TEAM

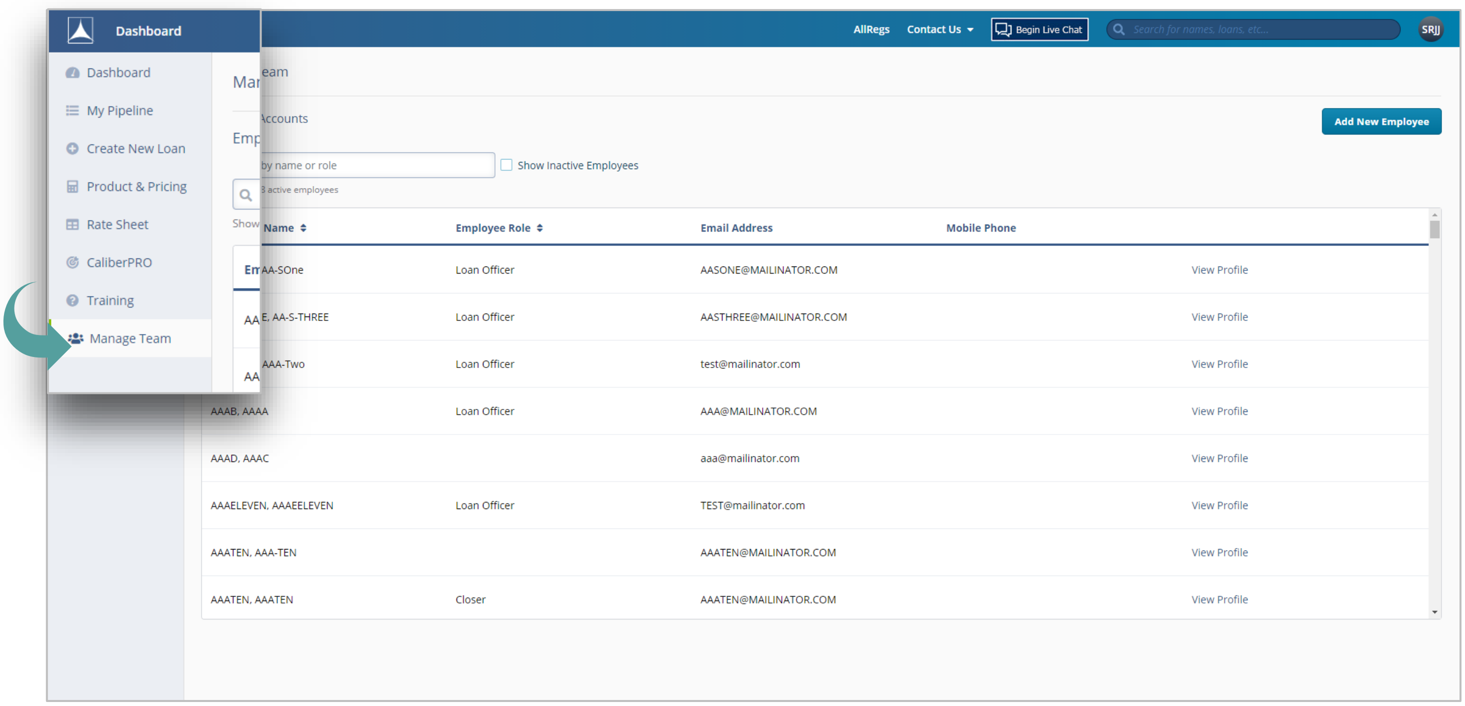
The Broker Portal is an exclusive platform that makes it even easier to do business with Caliber Home Loans. This job aid will give provide guidance to admins on how to utilize the **Manage Team** tab within the portal.

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

- Save time when adding new employees.
- Efficiently manage existing employee profiles.

Broker Portal: Manage Team

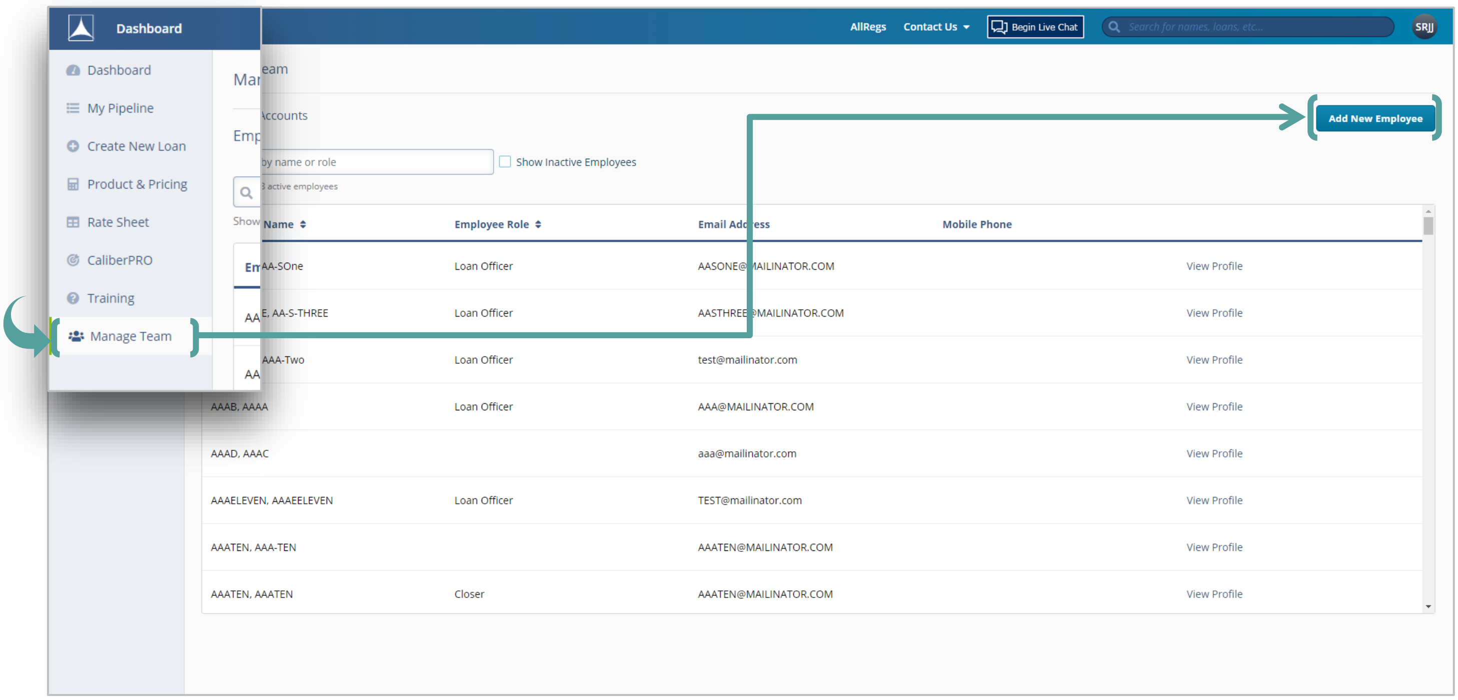
Adding new employees, or making edits to existing employees, can be done by accessing the **Manage Team** tab from the left navigation menu.



Manage Team: Add New Employee

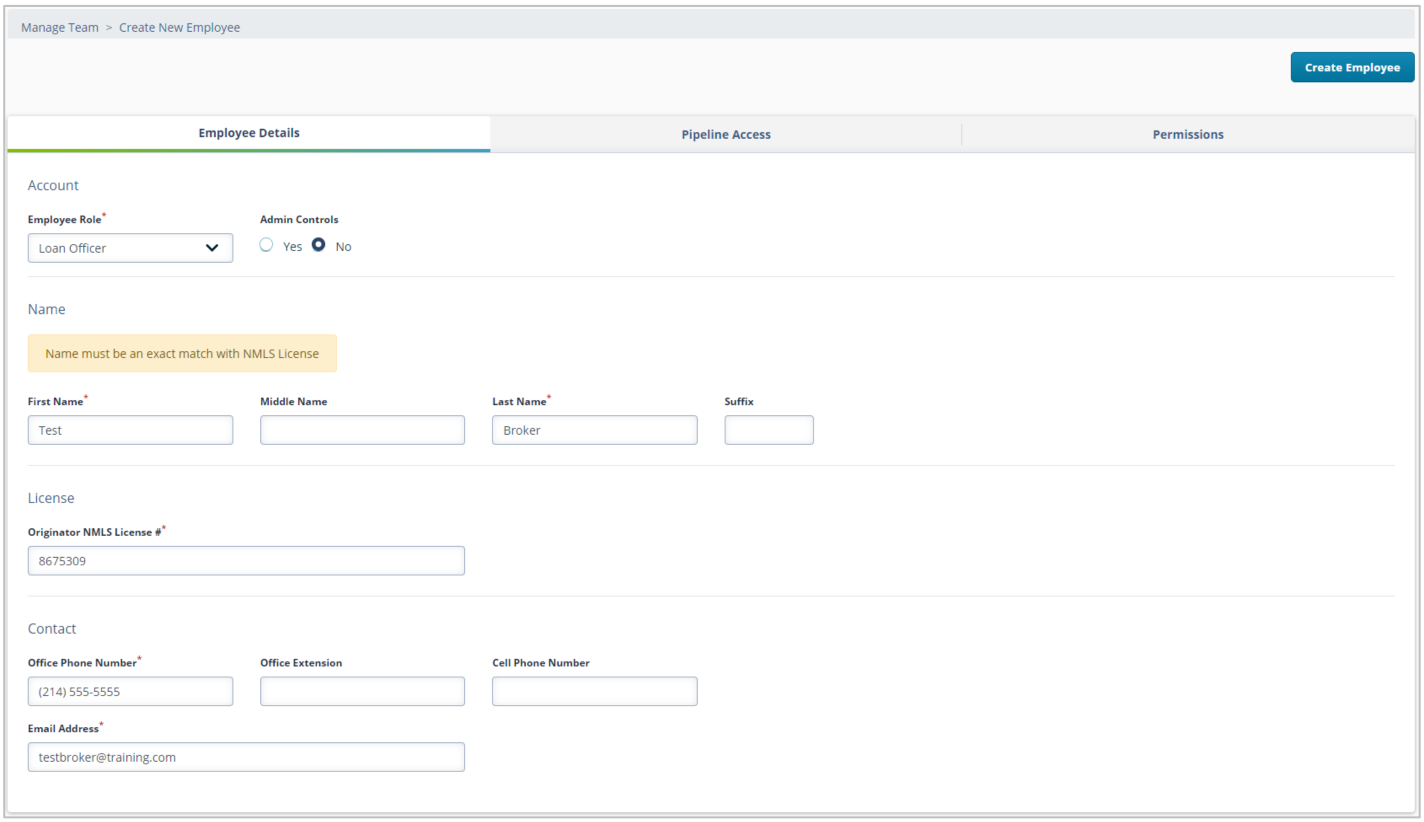
Admins can add new employees to the Broker Portal by using the **Add New Employee** button within the **Manage Team** tab.

Step
1 **Click Manage Team and then Add New Employee.**



Manage Team: Add New Employee, cont.

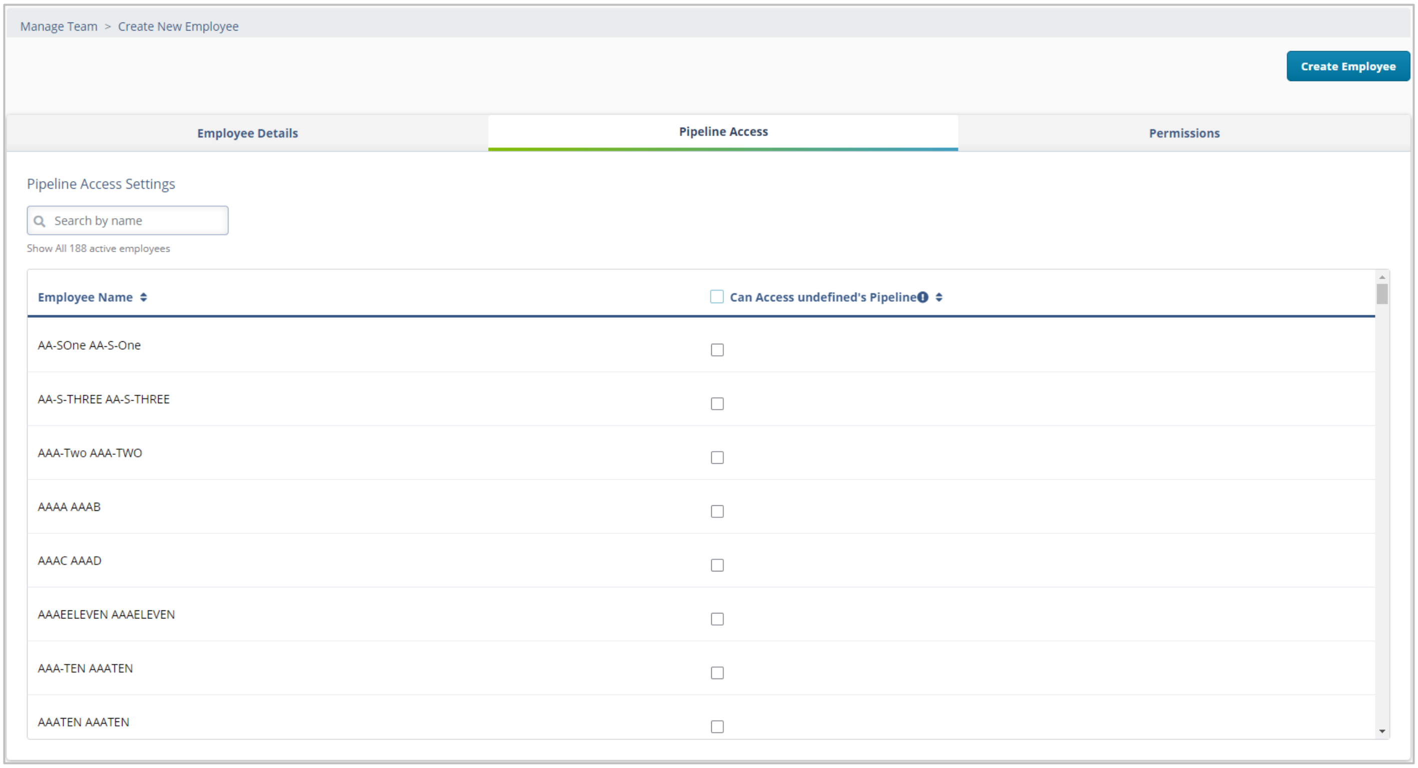
Step	
2 **Complete required fields on Employee Details tab.**	▪ Required fields are identified with a red * asterisk. ▪ Name must be an exact match with NMLS License. ▪ Click **Create Employee** once all required fields are completed. (Optional)



Manage Team: Add New Employee, cont.

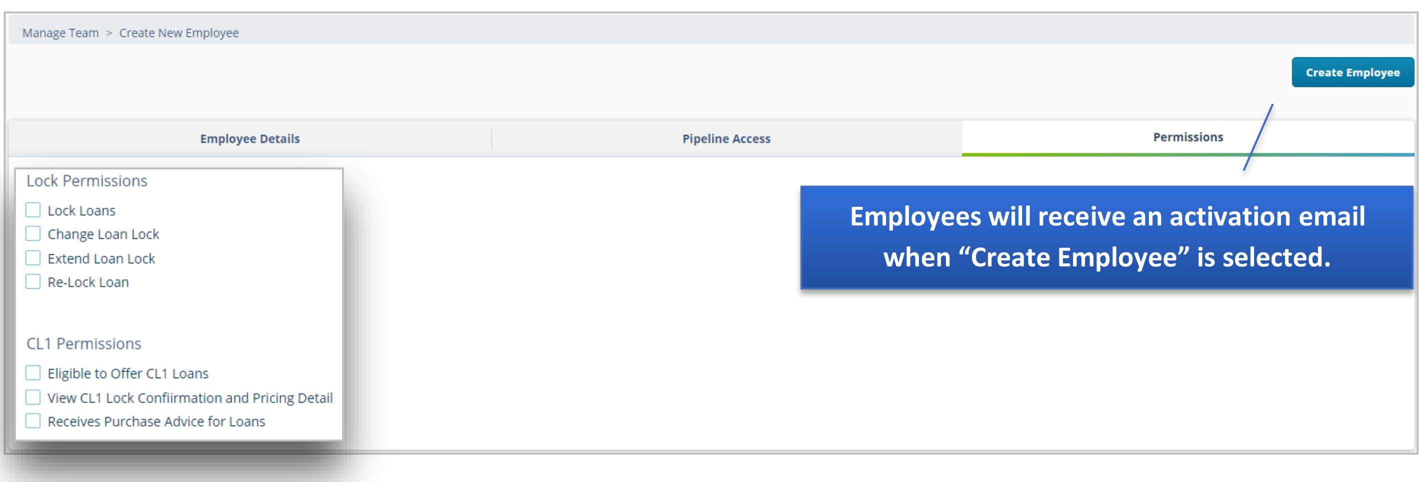
Step

3 Grant Pipeline Access (optional)



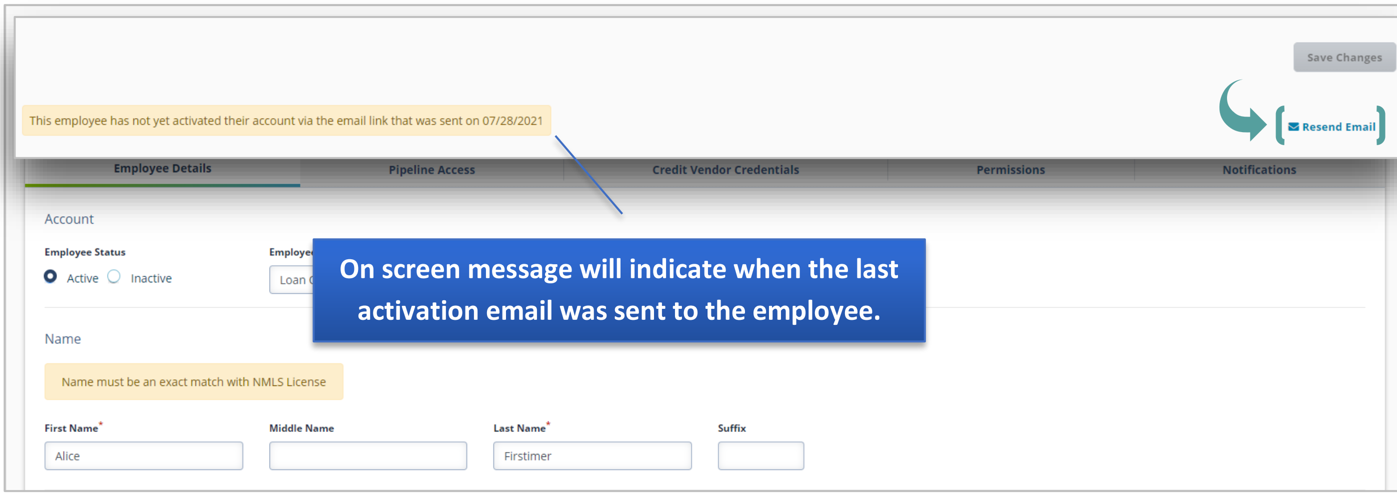
4 Grant Permissions (optional)

- CL1 Permissions appears only when applicable.



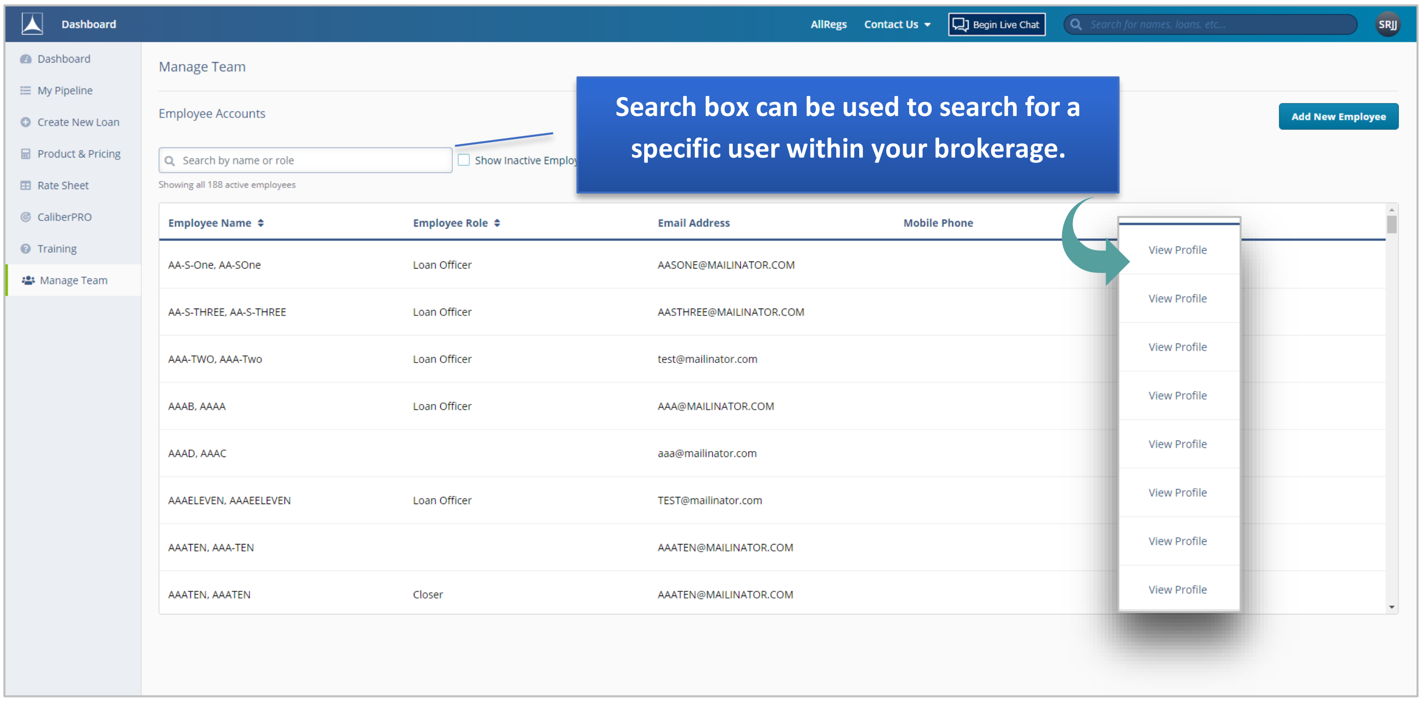
Manage Team: Add New Employee, cont.

Step	
5 **Resend Email (optional)**	▪ Admins can resend activation email 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, cont.

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

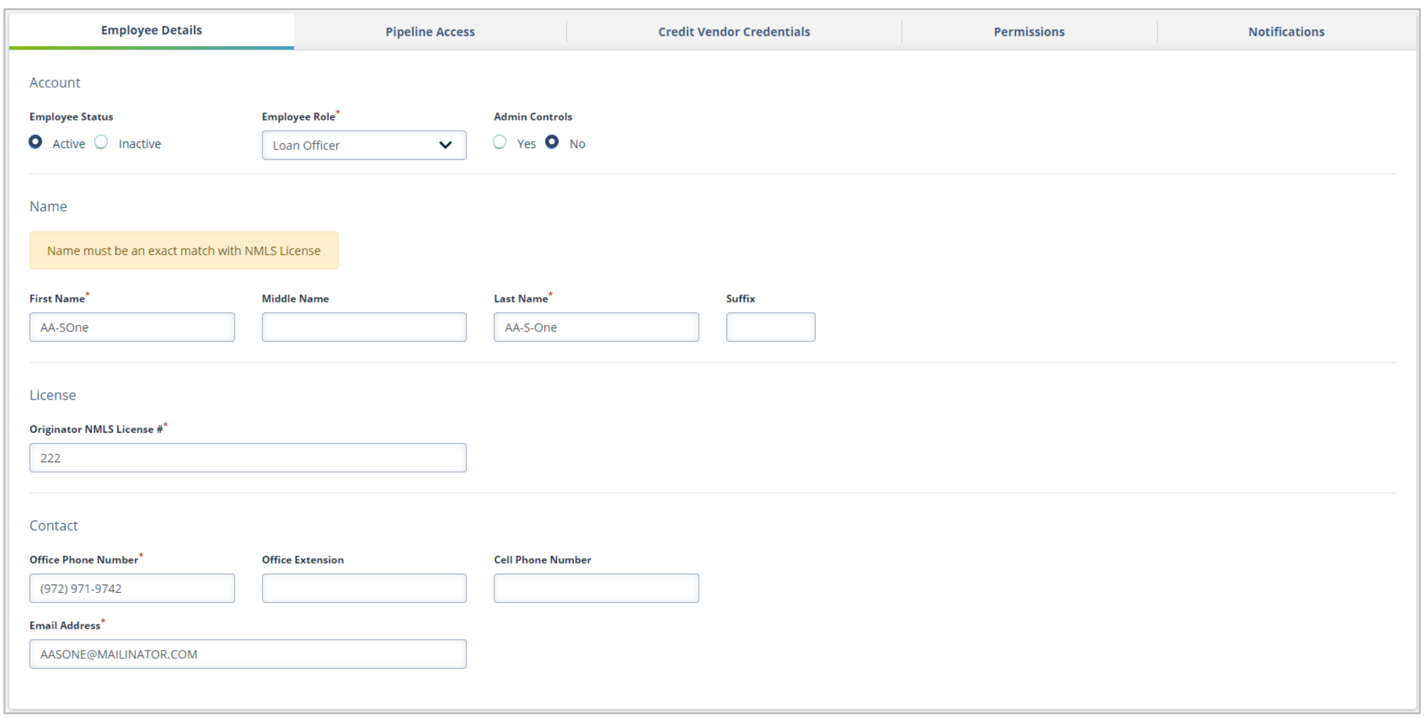
Enter the credit provider credentials for the providers utilized within your brokerage.

Permissions

Can toggle lock and CL1 permissions (if appliable)

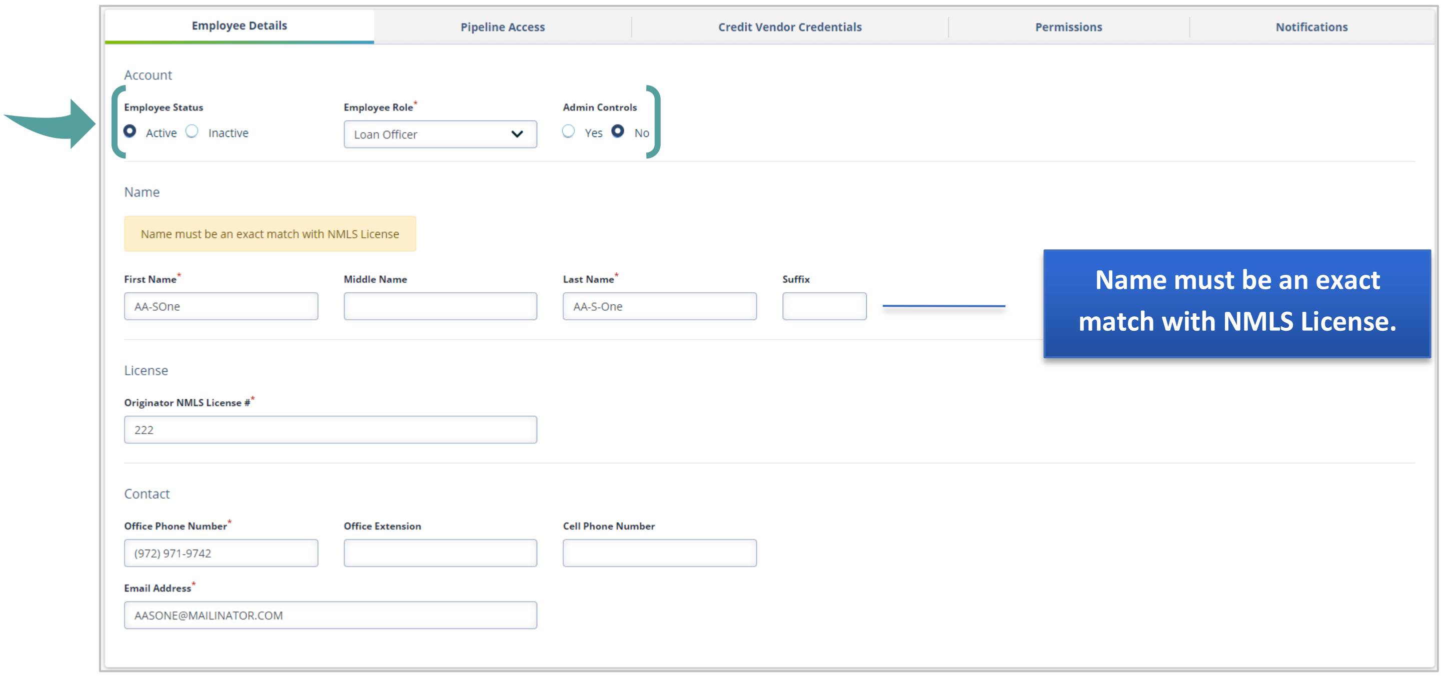
Notifications

Establish LSN notifications for each individual user.

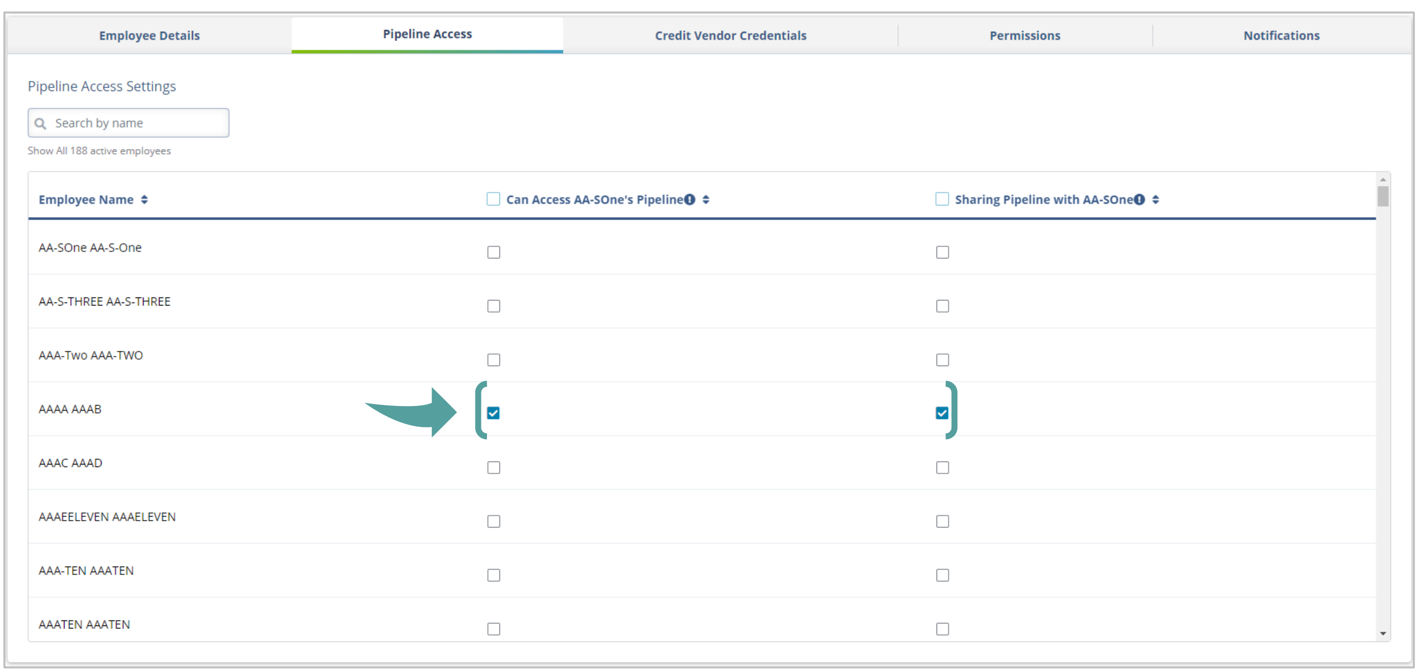


Manage Team: View Profile, cont.

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.

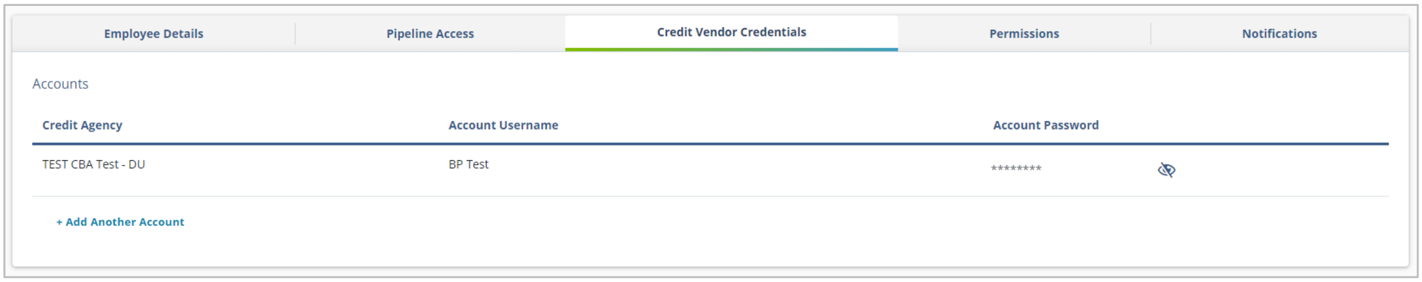


Pipeline Access allows for admins to determine who can share a pipeline, and who can see the pipeline, for each individual user.

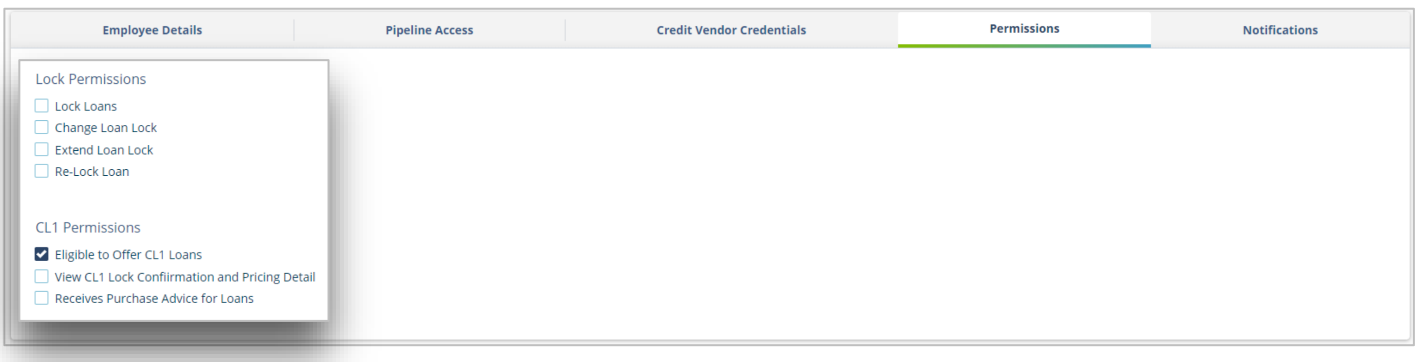


Manage Team: View Profile, cont.

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



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



Manage Team: View Profile, cont.

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