

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.

The screenshot shows the 'Manage Team' interface in the Broker Portal. The left navigation menu includes: Dashboard, My Pipeline, Create New Loan, Product & Pricing, Rate Sheet, CaliberPRO, Training, and **Manage Team**. The main content area has a search bar for '3 active employees' and a 'Show Inactive Employees' checkbox. Below is a table of employees:

Name	Employee Role	Email Address	Mobile Phone
AA-SOne	Loan Officer	AASONE@MAILINATOR.COM	View Profile
AA-E-AA-S-THREE	Loan Officer	AASTHREE@MAILINATOR.COM	View Profile
AAA-Two	Loan Officer	test@mailinator.com	View Profile
AAAB, AAAA	Loan Officer	AAA@MAILINATOR.COM	View Profile
AAAD, AAAC		aaa@mailinator.com	View Profile
AAAEEVEN, AAAEELEVEN	Loan Officer	TEST@mailinator.com	View Profile
AAATEN, AAA-TEN		AAATEN@MAILINATOR.COM	View Profile
AAATEN, AAATEN	Closer	AAATEN@MAILINATOR.COM	View Profile

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.

The screenshot displays the Caliber Home Loans Broker Portal interface. On the left, a navigation menu is visible with the 'Manage Team' option highlighted. A green arrow points from this menu item to the main content area. In the main content area, the 'Manage Team' tab is active, showing a table of employees. A green arrow points from the 'Add New Employee' button in the top right corner of the employee list to the 'Manage Team' menu item.

Show	Name	Employee Role	Email Address	Mobile Phone	
Err	AA-SOne	Loan Officer	AASONE@MAILINATOR.COM		View Profile
AAE	AA-S-THREE	Loan Officer	AASTHREE@MAILINATOR.COM		View Profile
AAA	AAA-Two	Loan Officer	test@mailinator.com		View Profile
AAA	AAA	Loan Officer	AAA@MAILINATOR.COM		View Profile
AAAD	AAAC		aaa@mailinator.com		View Profile
AAA	AAAELEVEN, AAAELEVEN	Loan Officer	TEST@mailinator.com		View Profile
AAATEN	AAA-TEN		AAATEN@MAILINATOR.COM		View Profile
AAATEN	AAATEN	Closer	AAATEN@MAILINATOR.COM		View Profile

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 > Create New Employee Create Employee

Employee Details
Pipeline Access
Permissions

Account

Employee Role* **Admin Controls**

Loan Officer Yes No

Name

Name must be an exact match with NMLS License

First Name* **Middle Name** **Last Name*** **Suffix**

Test Broker

License

Originator NMLS License #*

8675309

Contact

Office Phone Number* **Office Extension** **Cell Phone Number**

(214) 555-5555

Email Address*

testbroker@training.com

Manage Team: Add New Employee, cont.

Step

3 Grant Pipeline Access (optional)

Manage Team > Create New Employee Create Employee

Employee Details | **Pipeline Access** | Permissions

Pipeline Access Settings

Q Search by name

Show All 188 active employees

Employee Name	<input type="checkbox"/> Can Access undefined's Pipeline
AA-SOne AA-S-One	<input type="checkbox"/>
AA-S-THREE AA-S-THREE	<input type="checkbox"/>
AAA-Two AAA-TWO	<input type="checkbox"/>
AAAA AAAB	<input type="checkbox"/>
AAAC AAAD	<input type="checkbox"/>
AAAELEVEN AAAELEVEN	<input type="checkbox"/>
AAA-TEN AAATEN	<input type="checkbox"/>
AAATEN AAATEN	<input type="checkbox"/>

4 Grant Permissions (optional)

- CL1 Permissions appears only when applicable.

Manage Team > Create New Employee Create Employee

Employee Details | Pipeline Access | **Permissions**

Lock Permissions

Lock Loans

Change Loan Lock

Extend Loan Lock

Re-Lock Loan

CL1 Permissions

Eligible to Offer CL1 Loans

View CL1 Lock Confirmation and Pricing Detail

Receives Purchase Advice for Loans

Employees will receive an activation email when "Create Employee" is selected.

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.

The screenshot displays the 'Employee Details' tab of a user management system. At the top right, there is a 'Save Changes' button and a 'Resend Email' button with a circular arrow icon. A yellow notification banner at the top left states: 'This employee has not yet activated their account via the email link that was sent on 07/28/2021'. Below this, a blue callout box points to the 'Resend Email' button and contains the text: 'On screen message will indicate when the last activation email was sent to the employee.' The form fields include 'Employee Status' (Active/Inactive), 'Name' (with a note 'Name must be an exact match with NMLS License'), and 'First Name', 'Middle Name', 'Last Name', and 'Suffix' input boxes.

Manage Team: View Profile



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

The screenshot shows the 'Manage Team' section of a dashboard. At the top, there is a search box labeled 'Search by name or role' and a checkbox for 'Show Inactive Employees'. A blue callout box points to the search box with the text: 'Search box can be used to search for a specific user within your brokerage.' Below the search box is a table of employees with columns for Employee Name, Employee Role, Email Address, and Mobile Phone. A dropdown menu is open over the table, showing a 'View Profile' link for each row. The table contains the following data:

Employee Name	Employee Role	Email Address	Mobile Phone
AA-S-One, AA-SOne	Loan Officer	AASONE@MAILINATOR.COM	
AA-S-THREE, AA-S-THREE	Loan Officer	AASTHREE@MAILINATOR.COM	
AAA-TWO, AAA-Two	Loan Officer	test@mailinator.com	
AAAB, AAAA	Loan Officer	AAA@MAILINATOR.COM	
AAAD, AAAC		aaa@mailinator.com	
AAAELEVEN, AAAEELEVEN	Loan Officer	TEST@mailinator.com	
AAATEN, AAA-TEN		AAATEN@MAILINATOR.COM	
AAATEN, AAATEN	Closer	AAATEN@MAILINATOR.COM	

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 applicable)



Notifications

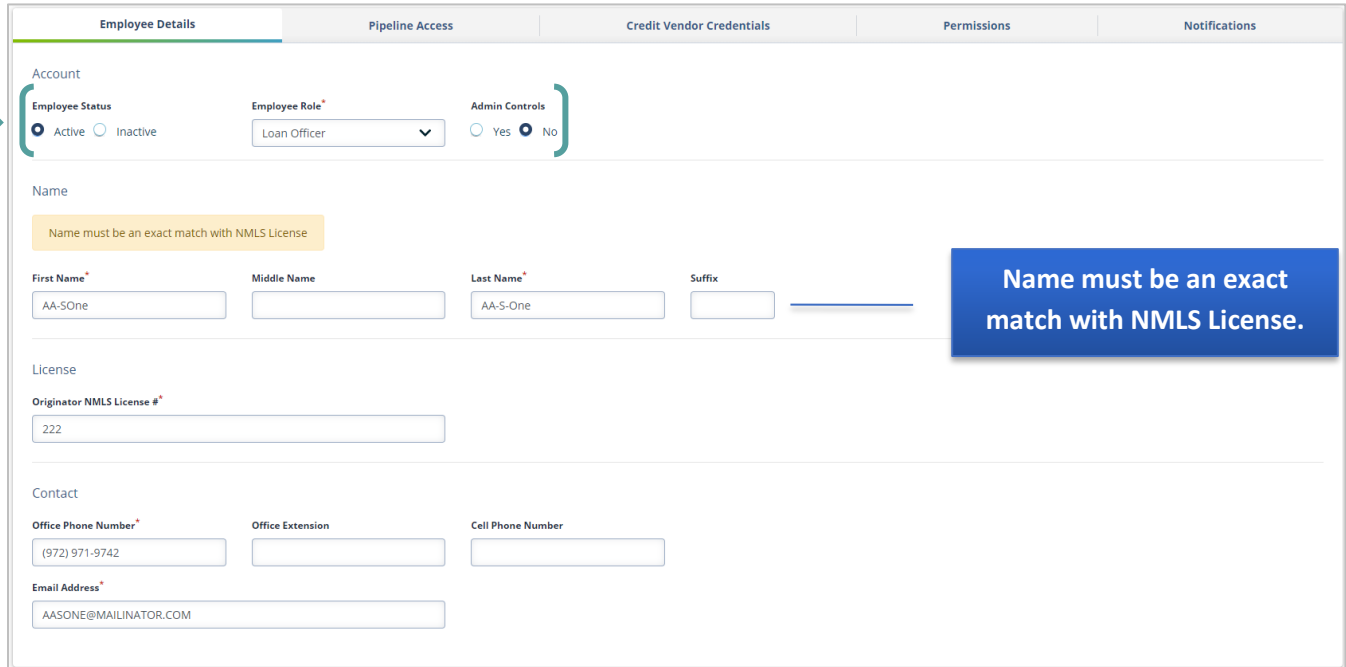
Establish LSN notifications for each individual user.

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
<p>Account</p> <p>Employee Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive</p> <p>Employee Role*: <input type="text" value="Loan Officer"/> ▼</p> <p>Admin Controls: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <hr/> <p>Name</p> <p style="background-color: #fff9c4; padding: 2px;">Name must be an exact match with NMLS License</p> <p>First Name*: <input type="text" value="AA-SOne"/> Middle Name: <input type="text"/> Last Name*: <input type="text" value="AA-SOne"/> Suffix: <input type="text"/></p> <hr/> <p>License</p> <p>Originator NMLS License #: <input type="text" value="222"/></p> <hr/> <p>Contact</p> <p>Office Phone Number*: <input type="text" value="(972) 971-9742"/> Office Extension: <input type="text"/> Cell Phone Number: <input type="text"/></p> <p>Email Address*: <input type="text" value="AASONE@MAILINATOR.COM"/></p>				

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.



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: AA-SOne | Middle Name: | Last Name: AA-S-One | Suffix: |

License

Originator NMLS License #: 222

Contact

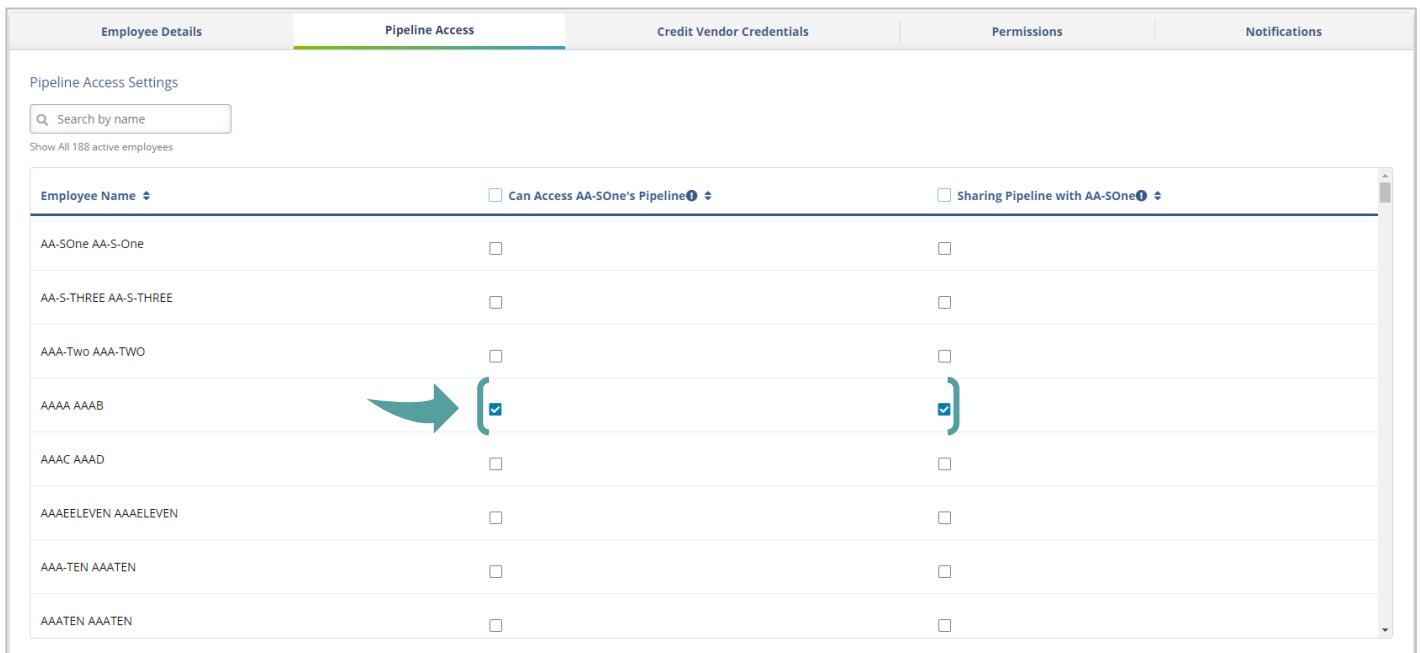
Office Phone Number: (972) 971-9742 | Office Extension: | Cell Phone Number: |

Email Address: AASONE@MAILINATOR.COM

Name must be an exact match with NMLS License.



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



Pipeline Access | Employee Details | Credit Vendor Credentials | Permissions | Notifications

Pipeline Access Settings

Search by name

Show All 188 active employees

Employee Name	Can Access AA-SOne's Pipeline	Sharing Pipeline with AA-SOne
AA-SOne AA-S-One	<input type="checkbox"/>	<input type="checkbox"/>
AA-S-THREE AA-S-THREE	<input type="checkbox"/>	<input type="checkbox"/>
AAA-Two AAA-TWO	<input type="checkbox"/>	<input type="checkbox"/>
AAAA AAAB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AAAC AAAD	<input type="checkbox"/>	<input type="checkbox"/>
AAAELEVEN AAAELEVEN	<input type="checkbox"/>	<input type="checkbox"/>
AAA-TEN AAATEN	<input type="checkbox"/>	<input type="checkbox"/>
AAATEN AAATEN	<input type="checkbox"/>	<input type="checkbox"/>

Manage Team: View Profile, cont.



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

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
Accounts				
Credit Agency		Account Username	Account Password	
TEST CBA Test - DU		BP Test	*****	
+ Add Another Account				



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

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Lock Permissions</p> <p><input type="checkbox"/> Lock Loans</p> <p><input type="checkbox"/> Change Loan Lock</p> <p><input type="checkbox"/> Extend Loan Lock</p> <p><input type="checkbox"/> Re-Lock Loan</p> <p>CL1 Permissions</p> <p><input checked="" type="checkbox"/> Eligible to Offer CL1 Loans</p> <p><input type="checkbox"/> View CL1 Lock Confirmation and Pricing Detail</p> <p><input type="checkbox"/> Receives Purchase Advice for Loans</p> </div>				

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.

Employee Details
Pipeline Access
Credit Vendor Credentials
Permissions
Notifications

[View Change History](#)

General Notifications

- Receive Caliber Rate Sheets

Loan Notifications

Pre-Submission

Unselect All

- 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
- LE Package has been e-signed by borrower

Underwriting

Unselect All

- UW Decision Updated Handler
- Underwriting Approved Handler
- Loan is in Underwriting

Appraisal

Unselect All

- Appraisal update has been posted for Loan
- Reply to Appraisal Cancellation Request has been received for Loan
- Your appraisal is complete for Loan
- The appraisal for loan has received a communication
- An appraisal request has been placed on loan number
- Appraisal Portal is now open for Loan
- Appraisal has been ordered via Collect at Closing

Closing & Funding

Unselect All

- Docs have been ordered for loan
- Closing documents are available for download for loan
- Funds have been sent for loan
- Funds have been released for loan
- The Closer has been assigned
- Closing Disclosure has been ordered
- Unable to Order Closing Disclosure
- Closing Disclosure Collaboration Available
- Closing Disclosure has been sent to the Borrower

CL1

Unselect All

- Event Purchase Suspense Notice Generated Handler

Click on "View Change History" to see a history of who has made changes to the notifications.