

## Correspondent Portal Administration Guide for Sellers

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***Use this Quick Reference Guide to assist with the creation of new user accounts, existing user password resets, changes to branch associations, and for the reactivation or deactivation of user accounts.***



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## Correspondent Portal Administrator Guide

1 **Navigate to** <https://seller.springeq.com/portal/#/login>

2 **Enter** your credentials, then **click** the "Login" button.

Spring EQ<sup>TM</sup>  
third party originations

\* User Name:

\* Password:

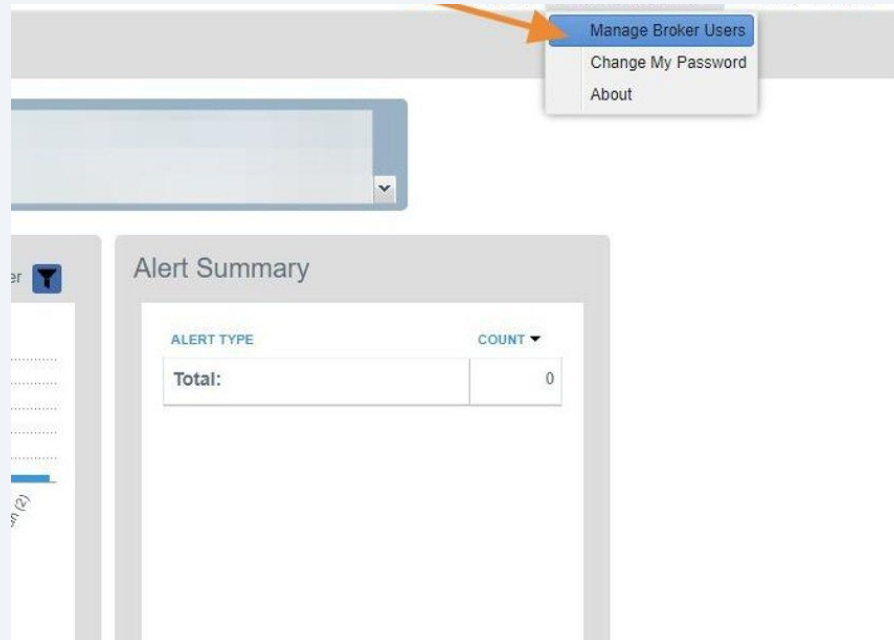
[Forgot Password](#)

For optimal results use Google Chrome, Mozilla Firefox, Internet Explorer 11 or Microsoft Edge

**3** Click your user name drop-down under the person icon on the screen's top right-hand side.



**4** Click "Manage Broker Users" in the drop-down selections.



5 Click on the "New User" button.

The screenshot shows a user management interface. At the top right, there are navigation links: Resources (gear icon), Test CorrespAdmin2 (user icon), Help (question mark icon), and Log Out (logout icon). A modal window titled "New User" is open in the foreground, displaying a table of user accounts. The table has three columns: ACCOUNT ENABLED, USER ROLE, and DIVISION. The "ACCOUNT ENABLED" column contains green checkmarks for all rows. The "USER ROLE" column lists various roles like "Partner Loan ..." and "Wholesale Po...". The "DIVISION" column lists "SEQ". A "New User" button is highlighted with an orange circle in the top right corner of the modal. To the right of the modal, a partial view of another interface element shows a "COUNT" dropdown menu with the value "0".

	ACCOUNT ENABLED	USER ROLE	DIVISION
-5555	✓	Partner Loan ...	SEQ
-5655	✓	Wholesale Po...	SEQ
-5555	✓	Wholesale Po...	SEQ
-1822	✓	Partner Loan ...	SEQ
-0000	✓	Corresponde...	SEQ
-0000	✓	Corresponde...	SEQ
-1111	✓	Corresponde...	SEQ
-1717	✓	Corresponde...	SEQ
-2588	✓	Corresponde...	SEQ
-0000	✓	Partner Loan ...	SEQ
-8888	✓	Partner Loan ...	SEQ


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**Click** the "\* User ID:" field. Use the naming convention of "c-FirstNameLastName"  
Example: John Smith would be given a User ID of c-JohnSmith

Broker User Maintenance

[Back to User List](#)

User Set Up

\* User ID:  

\* E-Mail:

Salutation:

\* First Name:

\* Last Name:

NMLS Id:

\* Phone Type:   Preferred

\* Phone Number:    SMS

\* Portal Access Profile:

System Access:

\* Division

Limited Loan Access

Broker Association  Re

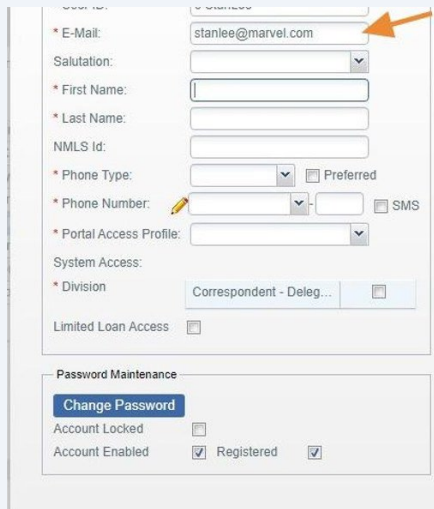
Associated Branches

BRANCH ID	BR

Add Broker Association

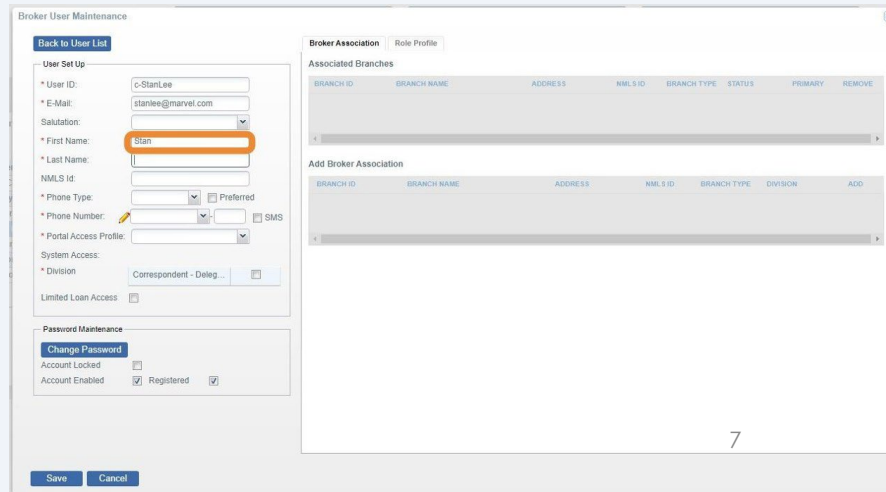
BRANCH ID

**7** Click the " E-Mail:" field. **Enter** the new user's work email address



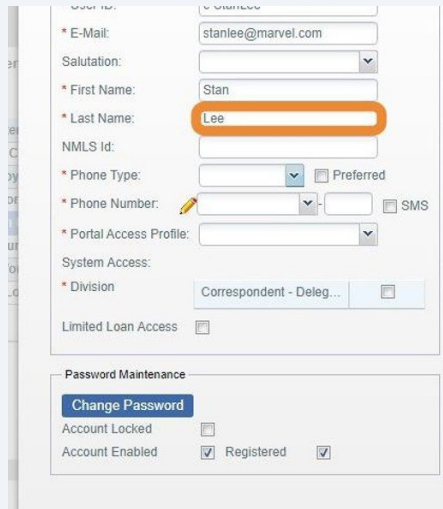
A screenshot of a user profile form. The "E-Mail:" field is highlighted with an orange arrow and contains the text "stanlee@marvel.com". Other fields include "Salutation:", "First Name:", "Last Name:", "NMLS Id:", "Phone Type:" (with a "Preferred" checkbox), "Phone Number:" (with an edit icon and an "SMS" checkbox), "Portal Access Profile:", "System Access:", "Division" (set to "Correspondent - Deleg..."), and "Limited Loan Access" (checkbox). A "Password Maintenance" section at the bottom includes a "Change Password" button, "Account Locked" (checkbox), and "Account Enabled" (checked) with a "Registered" checkbox (checked).

**8** Click the "First Name:" field. **Enter** the new user's first name.



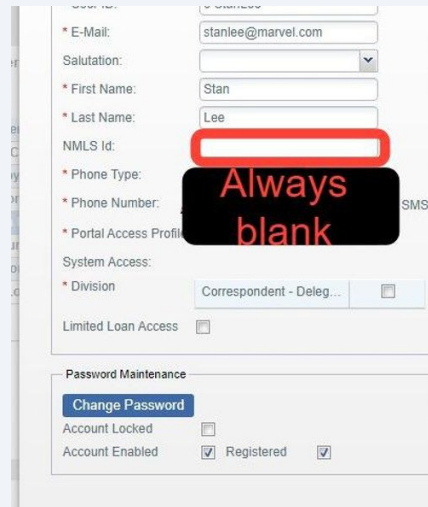
A screenshot of the "Broker User Maintenance" window. The "User Set Up" section on the left has the "First Name:" field highlighted with an orange circle and contains the text "Stan". The "Broker Association" section on the right shows "Associated Branches" and "Add Broker Association" tables. The "Associated Branches" table has columns: BRANCH ID, BRANCH NAME, ADDRESS, NMLS ID, BRANCH TYPE, STATUS, PRIMARY, REMOVE. The "Add Broker Association" table has columns: BRANCH ID, BRANCH NAME, ADDRESS, NMLS ID, BRANCH TYPE, DIVISION, ADD. The "User Set Up" section also includes fields for "User ID:" (C-StanLee), "E-Mail:" (stanlee@marvel.com), "Salutation:", "Last Name:", "NMLS Id:", "Phone Type:" (with "Preferred" checkbox), "Phone Number:" (with edit icon and "SMS" checkbox), "Portal Access Profile:", "System Access:", "Division" (Correspondent - Deleg...), "Limited Loan Access" (checkbox), and "Password Maintenance" (Change Password button, Account Locked checkbox, Account Enabled checked, Registered checked). "Save" and "Cancel" buttons are at the bottom.

**9** Click the "\* Last Name:" field. **Enter** the new user's last name.



A screenshot of a user profile form. The fields are: E-Mail (stanlee@marvel.com), Salutation (dropdown), First Name (Stan), Last Name (Lee, highlighted with an orange border), NMLS Id (blank), Phone Type (dropdown), Phone Number (dropdown), Portal Access Profile (dropdown), System Access (dropdown), Division (Correspondent - Deleg...), and Limited Loan Access (checkbox). Below the form is a Password Maintenance section with a Change Password button, Account Locked (checkbox), and Account Enabled (checked) Registered (checked).

**10** **Never** enter the NMLS Id. Always leave this blank.



A screenshot of a user profile form, identical to the one above. The NMLS Id field is highlighted with a red border. A black box with the text "Always blank" in red is overlaid on the NMLS Id field. The rest of the form and the Password Maintenance section are the same as in the previous image.



- 11** Phone Type: **Click** on the drop-down arrow. **Select** "Work" unless their cell phone was provided, then **select** "Mobile" instead.

The screenshot shows a user profile form with the following fields and values:

- E-Mail: stanlee@marvel.com
- Salutation: [dropdown]
- First Name: Stan
- Last Name: Lee
- NMLS Id: [empty]
- Phone Type: Work (selected in dropdown)
- Phone Number: [empty]
- Portal Access Profile: Mobile
- System Access: [dropdown]
- Division: Correspondent - Deleg...
- Limited Loan Access: [checkbox]

Below the form is a "Password Maintenance" section with a "Change Password" button and checkboxes for "Account Locked" (unchecked) and "Account Enabled" (checked). There is also a "Registered" checkbox (checked).

- 12** Phone Number: **Click** on the pencil icon.

The screenshot shows the same user profile form as in step 11, but with a pencil icon overlaid on the Phone Number field. The form fields and values are:

- User ID: c-StanLee
- E-Mail: stanlee@marvel.com
- Salutation: [dropdown]
- First Name: Stan
- Last Name: Lee
- NMLS Id: [empty]
- Phone Type: Work
- Phone Number: [empty]
- Portal Access Profile: [dropdown]
- System Access: [dropdown]
- Division: Correspondent - Deleg...
- Limited Loan Access: [checkbox]

The "Password Maintenance" section is also visible, including the "Change Password" button and checkboxes for "Account Locked" (unchecked) and "Account Enabled" (checked), along with a "Registered" checkbox (checked).

- 13** Enter the new user's phone number, and **check the box** for "Preferred", then **click Save**. If you skip the "Preferred" check box, the number will not save.

TYPE OF NUMBER	PHONE NUMBER	EXTENSION	PREFERRED	SMS
WORK	(317) 555-1212		<input checked="" type="checkbox"/>	

Save Cancel

- 14** Portal Access Profile: **Select** the appropriate user profile. See the definitions of each role below.

Salutation: [dropdown]

\* First Name: Stan

\* Last Name: Lee

NMLS Id: [input]

\* Phone Type: Work  Preferred

\* Phone Number: (317) 555-1212 [input] SMS

\* Portal Access Profile: [dropdown menu open]

- Correspondent Portal Administrator
- Correspondent Portal User**
- Correspondent Purchase Advice
- Correspondent Secondary
- Partner Loan Creator
- Partner Loan Officer
- Partner Loan Submitter
- Wholesale Portal Administrator
- Wholesale Portal User
- Wholesale Portal User NME

Change Password

Account Locked

Account Enabled



Tip! Following are the definitions of Portal Access Profile.

**1. Correspondent Administrator – assigned to at least one person who can control access for all of the other users in the portal.**

**2. Correspondent Portal User – should be assigned to any Seller user who will be using the Portal for registering loans, submitting loans, managing Conditions, and uploading documents. Anyone being assigned this profile should also be assigned the following roles – Partner Loan Creator, Partner Loan Officer, and Partner Loan Submitter.**

**1. Anyone being assigned this profile should also be assigned the following roles – Partner Loan Creator, Partner Loan Officer, and Partner Loan Submitter.**

**3. Correspondent Secondary – should be assigned to any Seller user who will be locking loans.**

**4. Correspondent Purchase Advice – should be assigned to any Seller user who will need to view the Purchase Advice.**

15

\*Division - **Click** the box next to Correspondent-Delegated or Correspondent - Non-Delegated. This will automatically be correct based on your channel.

Loan Officer

STATUS

Loan Register

Application C

Withdrawn by

Submitted for

Closed Loan

Ready for Pur

Withdrawn fo

Purchased Lo

Total

Salutation:

\* First Name:

\* Last Name:

NMLS Id:

\* Phone Type:   Preferred

\* Phone Number:    SMS

\* Portal Access Profile:

System Access:

\* Division:

Limited Loan Access

Password Maintenance

Account Locked

Account Enabled  Registered

Add Broker Association

BRANCH ID	BRANCH NAME

**16** Limited Loan Access: **NEVER CHECK THIS OPTION**

\* User ID: c-StanLee  
\* E-Mail: stanlee@marvel.com  
Salutation: [dropdown]  
\* First Name: Stan  
\* Last Name: Lee  
NMLS Id:  
\* Phone Type: Work [dropdown] [checked] Preferred  
\* Phone Number: (317) 555-1212 [dropdown] [checked] SMS  
\* Portal Access Profile: Correspondent Portal User [dropdown]  
System Access: Portal  
\* Division: Correspondent - Deleg... [dropdown]  
**Limited Loan Access**  **Never Check**  
Password Maintenance  
**Change Password**  
Account Locked   
Account Enabled [checked] Registered [checked]

**17** Click on the "Change Password" Button.

Application C  
Withdrawn by  
Submitted for  
Closed Loan  
Ready for Pur  
Withdrawn fo  
Purchased Lo  
Total  
BRANCH ID  
\* Phone Type: Work [dropdown] [checked] Preferred  
\* Phone Number: (317) 555-1212 [dropdown] [checked] SMS  
\* Portal Access Profile: Correspondent Portal User [dropdown]  
System Access: Portal  
\* Division: Correspondent - Deleg... [dropdown] [checked]  
Limited Loan Access   
Password Maintenance  
**Change Password**  
Account Locked   
Account Enabled [checked] Registered [checked]  
Save Cancel 12

**18** Click the "\*" New Password:" field. **Enter** the password you are assigning in both boxes. Make sure that it meets the Password Requirements.

Broker Association | Role Profile

Associated Branches

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE	STATUS

Set Password

Password

\* New Password:

\* Retype New Password:

**Password Requirements:**

1. Minimum Password Characters Length:	12
2. Minimum Number of Upper Case Letters:	0
3. Minimum Number of Lower Case Letters:	0
4. Minimum Number of Numeric Characters:	0
5. Minimum Number of Special Characters:	0
6. Number of Change Passwords before reuse:	10

**19** Click on the "Update" button.

3. Minimum Number of Lower Case Letters: 0

4. Minimum Number of Numeric Characters: 0

5. Minimum Number of Special Characters: 0

6. Number of Change Passwords before reuse: 10

Update Cancel

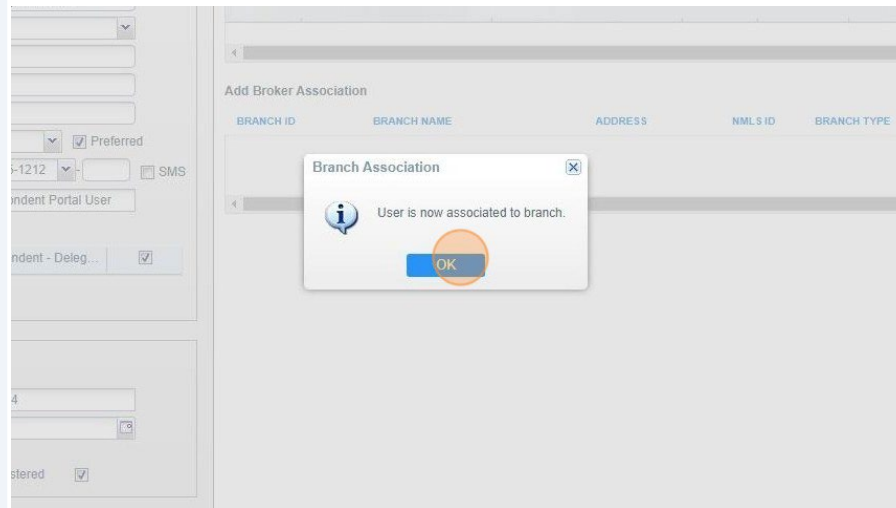
**20** Click on the "Save" button.

A screenshot of a user profile form. The form contains several fields: Phone Type (Work), Phone Number ((317) 555-1212), Portal Access Profile (Correspondent Portal User), System Access (Portal), and Division (Correspondent - Deleg...). There are also checkboxes for Preferred, SMS, Limited Loan Access, Account Locked, and Registered. A 'Change Password' button is visible in the Password Maintenance section. At the bottom, the 'Save' button is circled in orange.

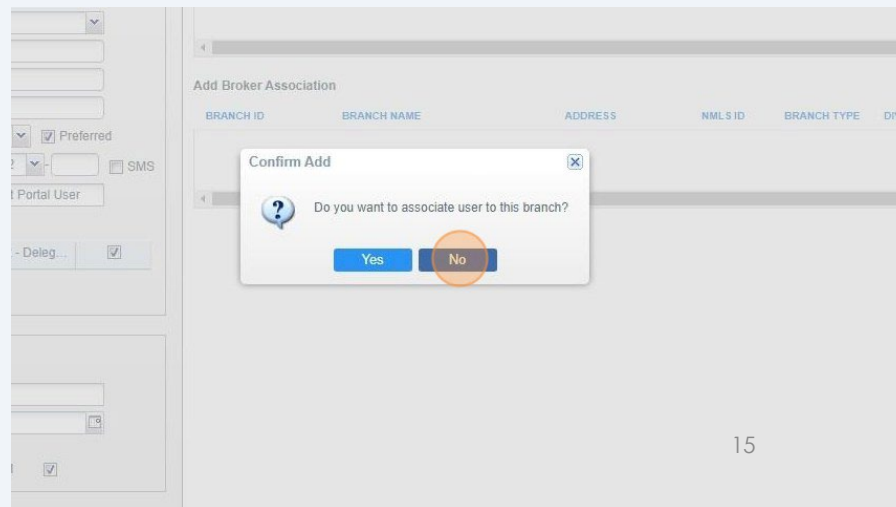
**21** A pop-up will appear asking if you want to associate the user to the branch that is shown. If it is correct, **click** the "Yes" button. **If incorrect, go to step 23.**

A screenshot of a 'Confirm Add' dialog box. The dialog box contains a question mark icon and the text 'Do you want to associate user to this branch?'. Below the text are two buttons: 'Yes' and 'No'. The 'Yes' button is circled in orange. In the background, a table titled 'Add Broker Association' is visible, with columns for BRANCH ID, BRANCH NAME, ADDRESS, NMLS ID, and BRANCH.

**22** Click the "Okay" button.



**23** A pop-up will appear asking if you want to associate the user to the branch that is shown. If it is incorrect, **click** the "No" button.



**24** To remove this branch from this user, **click** the red "Remove" button at the end of the branch information.

respondent - Delegated  
proved

Re

Broker Association | Role Profile

Associated Branches

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE	STATUS	PRIMARY	REMOVE
4000053	MCM Holdings, Inc.	14100 Palmetto Frontage Road, Miami Lakes, FL 33016	213236	Company	Approved	<input checked="" type="checkbox"/>	

Add Broker Association

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE	DIVISION	ADD
-----------	-------------	---------	---------	-------------	----------	-----

**25** When the pop-up comes up, **click** the "Yes" button to remove the user from association to this branch.

stan  
ee

Work  Preferred  
317) 555-1212  SMS  
Correspondent Portal User  
ortal  
Correspondent - Deleg...

2/06/2024

Registered

Add Broker Association

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH T
-----------	-------------	---------	---------	----------

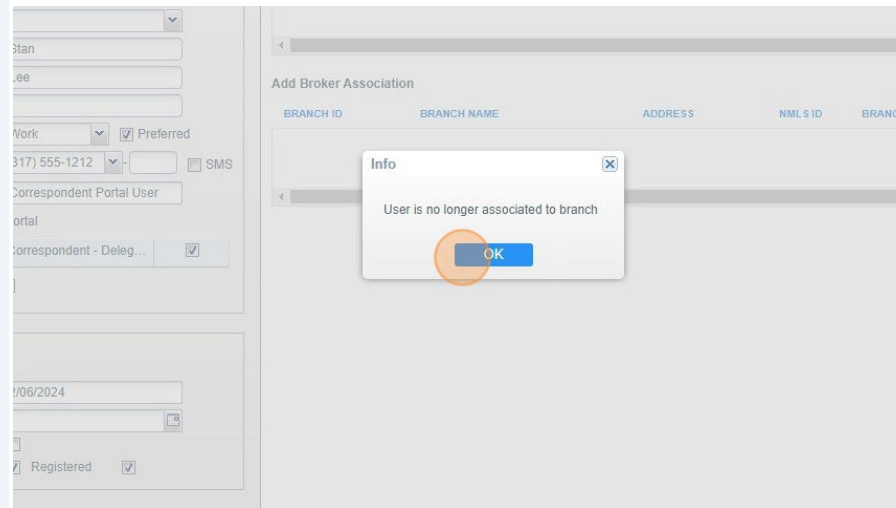
Confirm Remove

Do you want to remove user association to branch?

Yes No



**26** Click "Okay" to complete the removal of the branch from this user. **Go back** to step 21 and select the branch the user should be associated with.



**i** Roles are the same as the Portal Access Profiles.

**1. Correspondent Administrator – assigned to at least one person who can control access for all of the other users in the portal.**

**2. Correspondent Portal User – should be assigned to any Seller user who will be using the Portal for registering loans, submitting loans, managing Conditions, and uploading documents. Anyone being assigned this Profile should also be assigned the following roles – Partner Loan Creator, Partner Loan Officer, and Partner Loan Submitter.**

**1. Anyone being assigned this Profile should also be assigned the following roles – Partner Loan Creator, Partner Loan Officer, and Partner Loan Submitter.**

**3. Correspondent Secondary – should be assigned to any Seller user who will be locking loans.**

**4. Correspondent Purchase Advice – should be assigned to any Seller user who will need to view the Purchase Advice.**

## 27 Click "Role Profile"

213236 Channel: Correspondent - Delegated  
4000053 Broker Status: Approved  
CONV

Broker Association Role Profile

Associated Branches

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE

Add Broker Association

BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRAN

User Set Up

c-StanLee  
stanlee@marvel.com  
Stan  
Lee  
Work Preferred  
(317) 555-1212 SMS  
Correspondent Portal User

## 28 Click on the "New Role" button.

NMLS ID#: 213236 Channel: Correspondent - Delegated  
load Broker ID#: 4000053 Broker Status: Approved  
Approved For: CONV

B2B Portal

Broker User Maintenance

Back to User List

User Set Up

\* User ID: c-StanLee  
\* E-Mail: stanlee@marvel.com  
Salutation:  
\* First Name: Stan  
\* Last Name: Lee  
NMLS ID:  
\* Phone Type: Work Preferred  
\* Phone Number: (317) 555-1212 SMS  
\* Portal Access Profile: Correspondent Portal User

Broker Association Role Profile

New Role

ROLE	VALID FROM	VA
Correspondent Portal User		



If the user added is listed as a "Correspondent Portal User", the three additional roles in steps 29-40 must be added.

29

Click on the drop-down under "\*Role" to add the three additional roles they must also have.

The screenshot shows a 'New Role' form with a table and a dialog box. The table has columns for ROLE, VALID FROM, VALID THROUGH, ENABLED, and PRIMARY. A row is visible with the role 'Correspondent Portal User' and green checkmarks in the ENABLED and PRIMARY columns. The 'Add New Role' dialog box is open, showing a dropdown menu for '\*Role' which is highlighted with an orange circle. Other fields in the dialog include 'Valid From', 'Valid Through', 'Enabled', and 'Primary', each with a checkbox. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

ROLE	VALID FROM	VALID THROUGH	ENABLED	PRIMARY
Correspondent Portal User			✓	✓

**Add New Role**

\* Role:

Valid From:

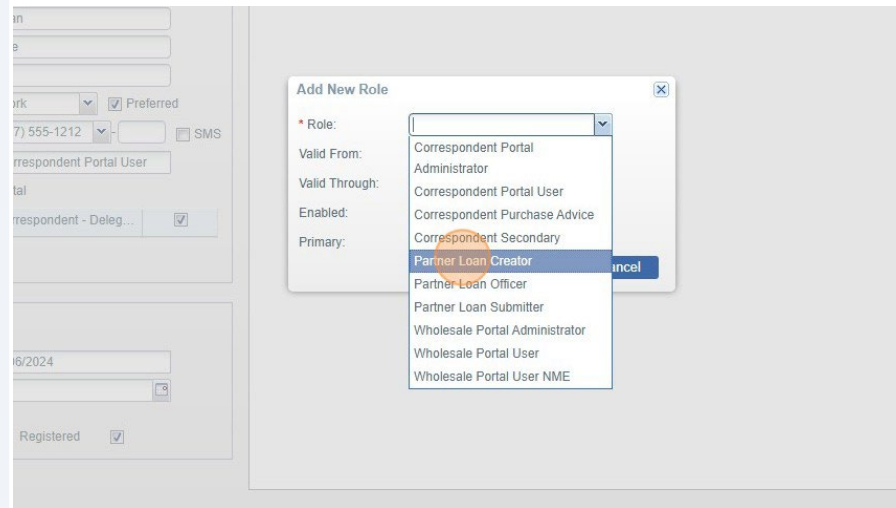
Valid Through:

Enabled:

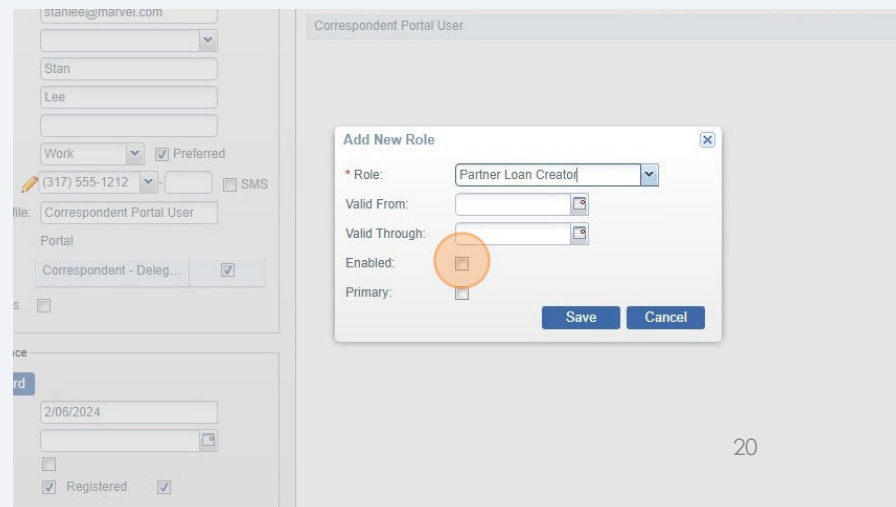
Primary:

Save Cancel

**30** Click "Partner Loan Creator"



**31** Click the "Enabled:" field.



**32** Click the "Save" button.

Add New Role

\* Role: Partner Loan Creator

Valid From: [Date Picker]

Valid Through: [Date Picker]

Enabled:

Primary:

Save Cancel

**33** Click the "New Role" button.

NMLS ID#: 213236 Channel: Correspondent - Delegated  
Broker ID#: 4000053 Broker Status: Approved  
Approved For: CONV

Portal

User Maintenance

Link to User List

User Set Up

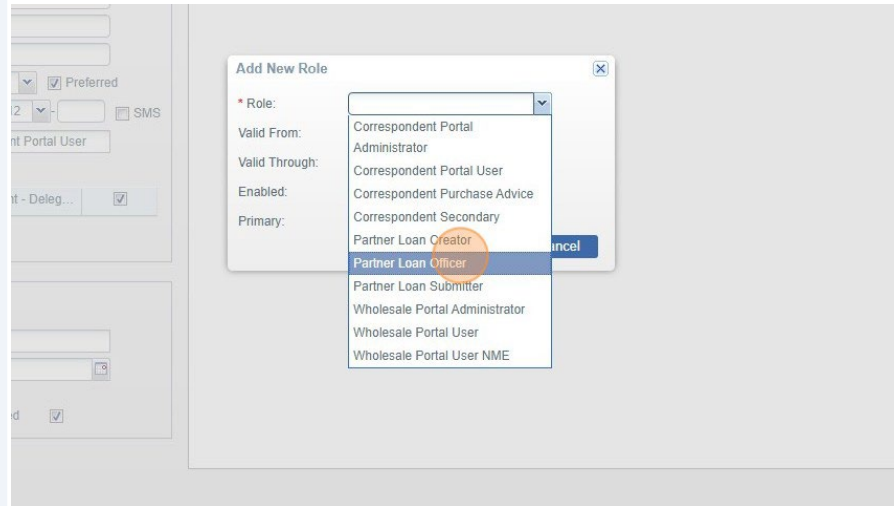
User ID: c-StanLee  
Email: stanlee@marvel.com  
Location: [Dropdown]  
First Name: Stan  
Last Name: Lee  
LS ID: [Text Field]  
Phone Type: Work Preferred  
Phone Number: (317) 555-1212 SMS  
Portal Access Profile: Correspondent Portal User

Broker Association Role Profile

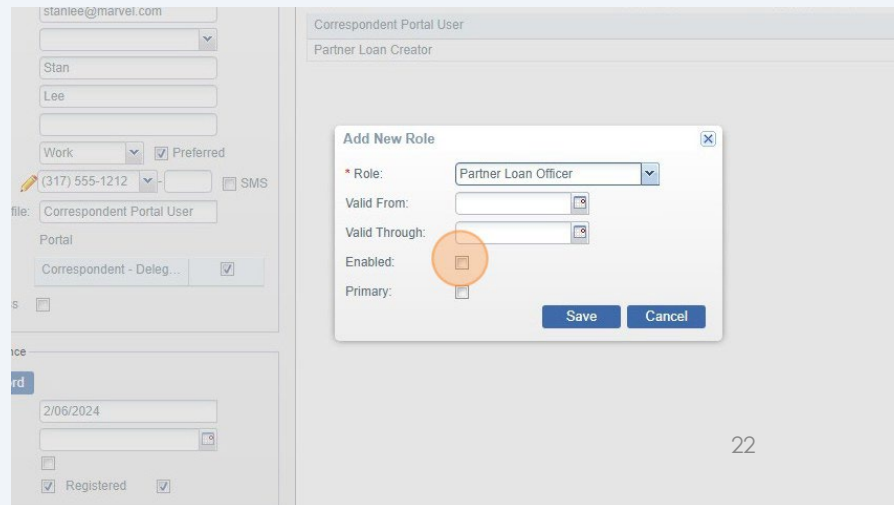
New Role

ROLE	VALID FROM	VALID THRU
Correspondent Portal User		
Partner Loan Creator		

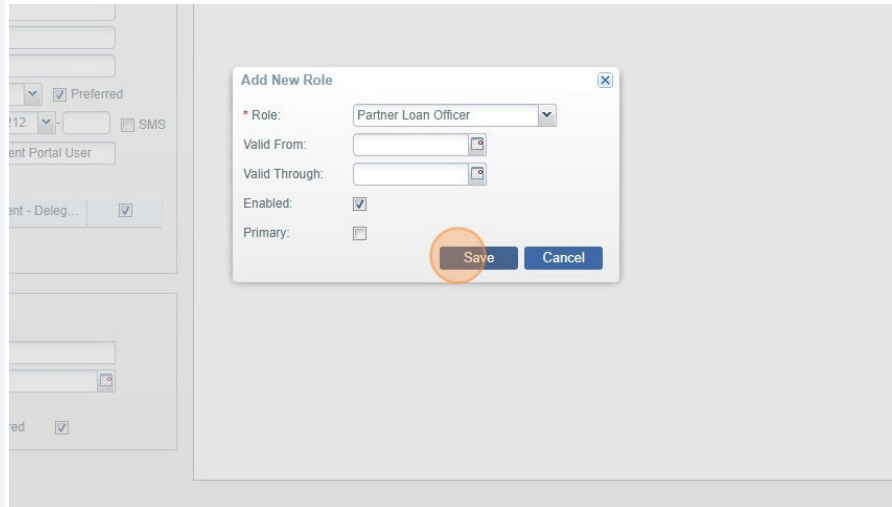
**34** Click "Partner Loan Officer"



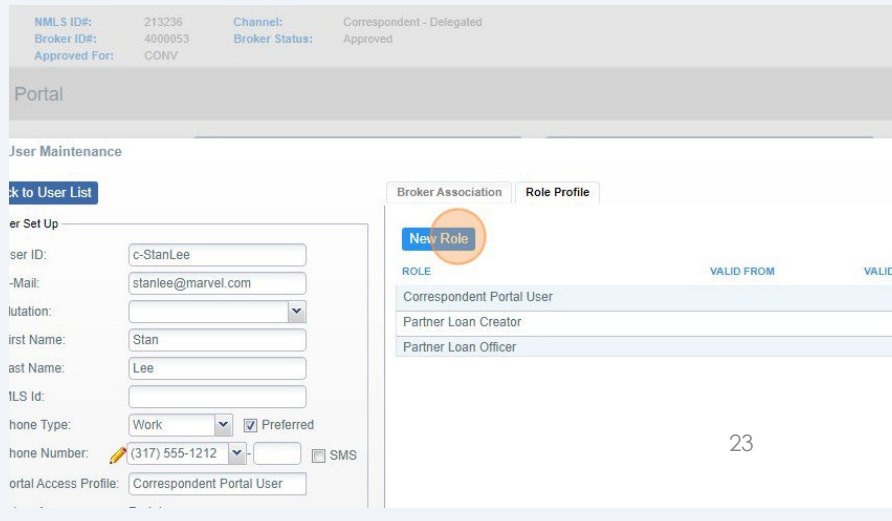
**35** Click the "Enabled:" field.



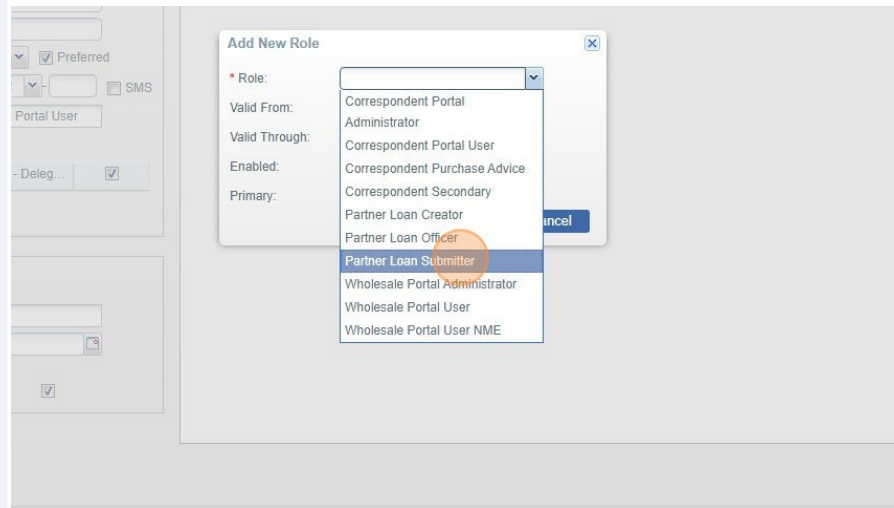
**36** Click the "Save" button.



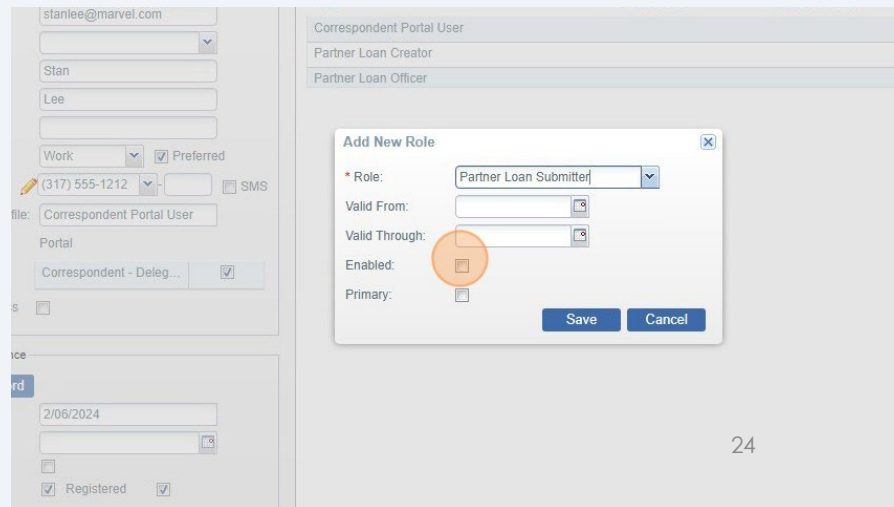
**37** Click "New Role".



**38** Click "Partner Loan Submitter"

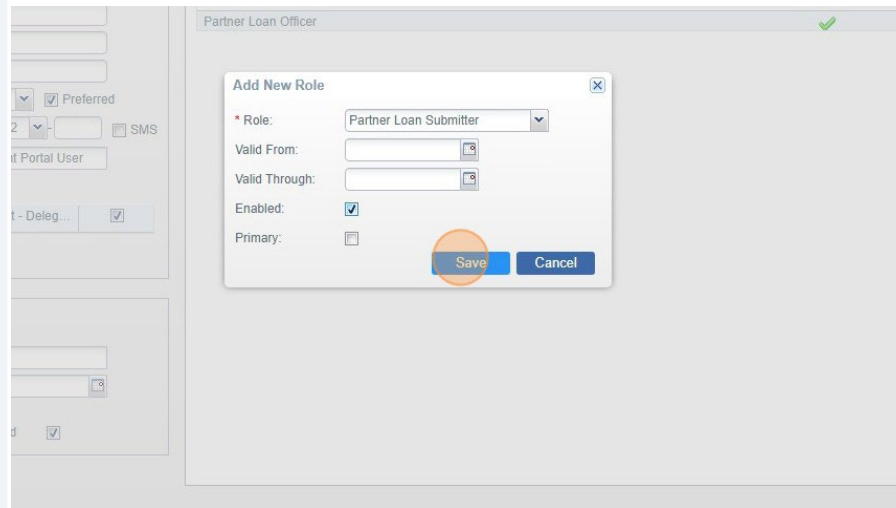


**39** Click the "Enabled:" field.



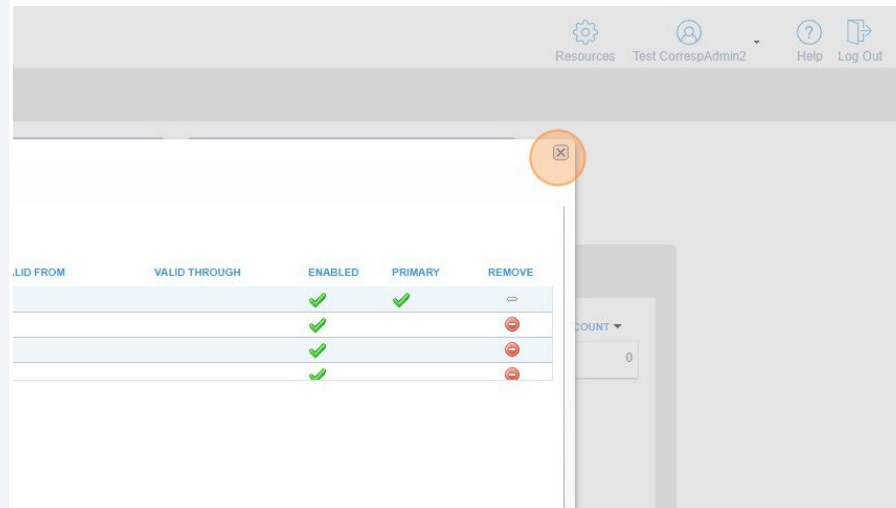


**40** Click the "Save" button.



**i** A person can have multiple roles. Follow the steps above if you want the user to have multiple roles such as Correspondent Purchase Advice or Correspondent Secondary in addition to the Portal User role. They can have all three roles if desired.

**41** Click the "X" in the top right corner of the pop-up screen to close it out. This will automatically save the roles.



• Each Branch ID will have a unique NMLS ID

• For larger, national accounts, add the new user to the main company account

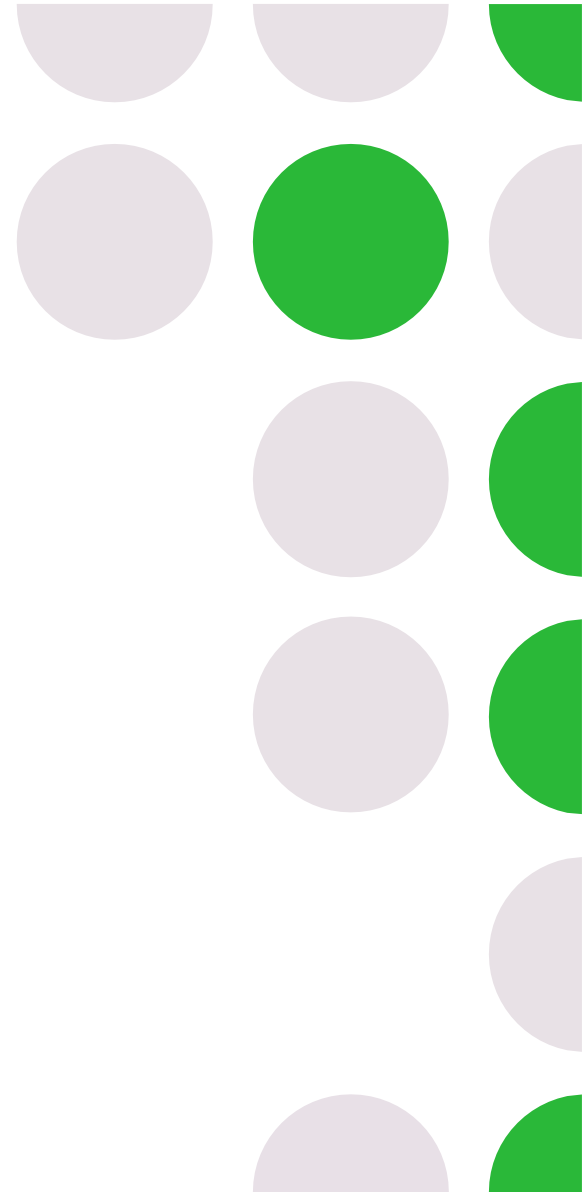
• If multiple associations are requested (e.g., both main company and a branch location), add both to the user profile, then check the box under Primary next to the one which will be used most frequently



Questions? Please reach out to your dedicated Account Executive!

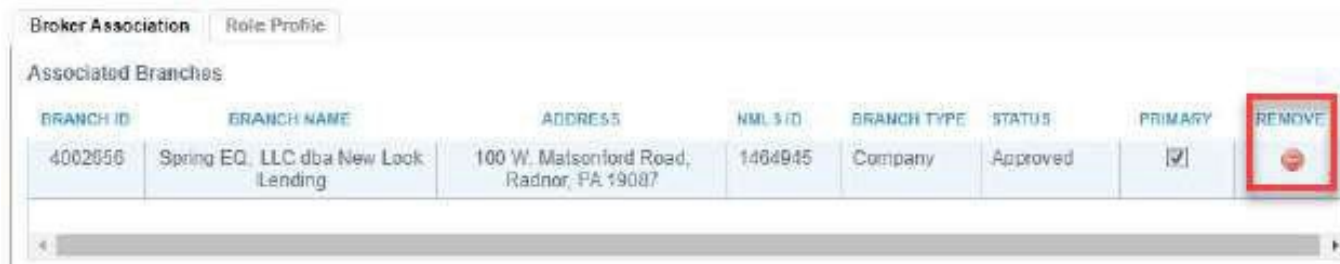
# Resetting a Password


- Click the arrow next to your name on the top navigation bar and select **Manage Broker Users**
- Use the **Search** option on the top left of the **Broker User Maintenance** screen to search by name or email address to find the user account
  - If the user does not exist, revert to the **ADD NEW USER** section instead
  - If the user exists, proceed with next steps
- Click on **Change Password**
- Enter the new password in both fields, then click **Update**



# Changing Branch Association

- Click the arrow next to your name on the top navigation bar and select **Manage Broker Users**
- Use the **Search** option on the top left of the **Broker User Maintenance** screen to search by name or email address to find the user account
  - If the user does not exist, revert to the **ADD NEW USER** section instead
  - If the user exists, proceed with next steps
- Review the **Broker Association** tab
  - **Associated Branches:** This section will show what branches are currently associated with the user account
    - If an incorrect association was made, select the red “-” icon under **Remove** to disassociate the branch from the user



BRANCH ID	BRANCH NAME	ADDRESS	NML S ID	BRANCH TYPE	STATUS	PRIMARY	REMOVE
4002656	Spring EQ, LLC dba New Look Lending	100 W. Malsonford Road, Radnor, PA 19087	1464945	Company	Approved	<input checked="" type="checkbox"/>	

# Changing Branch Association Continued

- **Add Broker Association:** This section will show any additional branches which may be associated with the user account
  - Select the green “+” icon under **Add** to associate the branch with the user



BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE	DIVISION	ADD
4002658	Spring EQ, LLC dba New Look Landing	100 W. Mellenford Road, Radnor, PA 19087	1464945	Company	SEQ	

- Click **Yes** to the popup window confirming to proceed with the association

Click **OK** to the popup window confirming the branch association is complete

# Changing Branch Association Continued

- **Association Notes:**

- Each Branch ID will have a unique NMLS ID
- For larger, national accounts, add the new user to the main company account
- If multiple associations are requested (e.g., both main company and a branch location), add both to the user profile, then check the box under Primary next to the one which will be used most frequently

# Reactivate Account

- Click the arrow next to your name on the top navigation bar and select **Manage Broker Users**
- Use the **Search** option on the top left of the **Broker User Maintenance** screen to search by name or email address to find the user account
  - If the user does not exist, revert to the **ADD NEW USER** section instead
  - If the user exists, proceed with next steps
- In the section for Password Maintenance, click the checkbox next to **Account Enabled**, then click **Save**



Password Maintenance

**Change Password**

Password Last Changed: 9/19/2022

Password Expires:

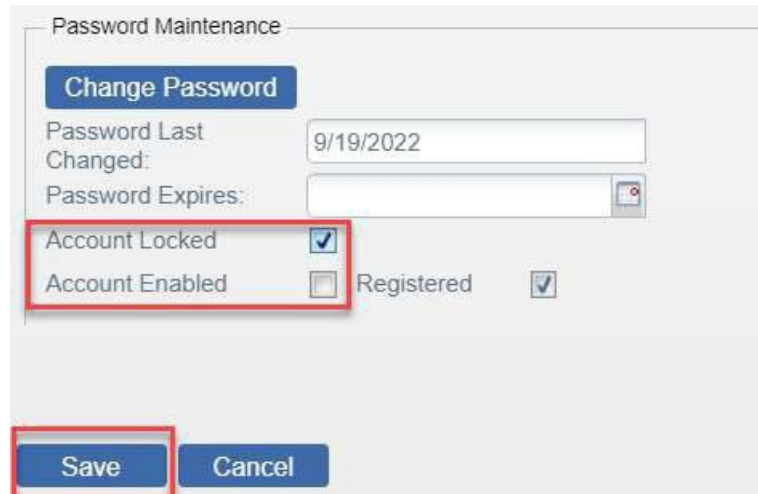
Account Locked

Account Enabled  Registered

**Save** **Cancel**

# Deactivate Account

- Click the arrow next to your name on the top navigation bar and select **Manage Broker Users**
- Use the **Search** option on the top left of the **Broker User Maintenance** screen to search by name or email address to find the user account
- In the section for Password Maintenance, check the box next to **Account Locked** and uncheck the box next to **Account Enabled**, then click **Save**



The screenshot shows a 'Password Maintenance' form with the following elements:

- A blue button labeled 'Change Password'.
- A text input field for 'Password Last Changed:' containing the date '9/19/2022'.
- A text input field for 'Password Expires:' with a calendar icon.
- A red box highlights the 'Account Locked' checkbox, which is checked, and the 'Account Enabled' checkbox, which is unchecked.
- A 'Registered' checkbox is checked.
- At the bottom, a red box highlights the 'Save' button, and a 'Cancel' button is also visible.



# Deactivate Account Continued

- Review the **Broker Association** tab
  - **Associated Branches:** Remove association from the broker company and all branches by selecting the red “-” icon under **Remove** to disassociate the branch from the user



BRANCH ID	BRANCH NAME	ADDRESS	NMLS ID	BRANCH TYPE	STATUS	PRIMARY	REMOVE
4002656	Spring EQ, LLC dba New Look Lending	100 W. Malsonford Road, Radnor, PA 19087	1464945	Company	Approved	<input checked="" type="checkbox"/>	

- Click **Yes** to the popup window confirming to proceed with removing the association
- Click **OK** to the popup window confirming the branch association changes are complete

# Thank you for choosing Spring EQ!!

For questions or additional assistance, please reach out to your dedicated Account Executive!

