

ADDING/REMOVING A LOAN OFFICER

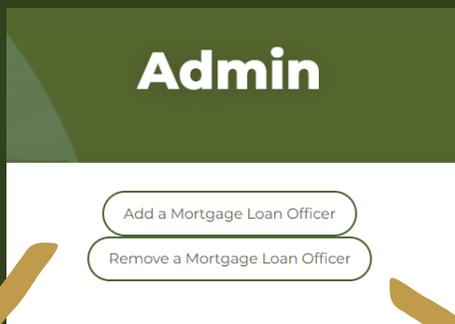
(Sales managers & branch managers only)

1



From the home page, click on "Admin". Only sales managers and branch managers have access to this page.

2



The "Admin" page will take you here. This is where you pick if you want to add or remove a loan officer.

3

ADDING A LOAN OFFICER

A form titled 'Add a Mortgage Loan Officer'. It has a text input field for 'New Loan Officer First and Last Name *' and a smaller text input field for 'Brand *' at the bottom left.

This will bring you to a form to fill out for the NEW loan officer. Enter in all of their information and hit "SUBMIT" at the end of the form. Marketing will get this request and begin the onboarding process.

4

REMOVING A LOAN OFFICER

A form titled 'Remove a Mortgage Loan Officer'. It features a dropdown menu labeled 'Select Mortgage Loan Officer to Remove' with 'Select' as the current choice. Below it is a text input field for 'Comments'.

This will take you to a form to fill out for the loan officer that is being removed. Fill the form out and hit "SUBMIT" at the end. This will get sent to marketing and that Loan Officer will be removed from all marketing materials.