



Blueprint for Brokers: Manage Team

Training Manual



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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 left navigation menu.

Employee Role	Email Address	Mobile Phone	
Loan Officer	AAA-ONE,AAA-ONE.CaliberBlackHawkUAT1New.chi@mailinator.com	(972) 971-9742	View Profile
Loan Officer	AAA-SWAP,AAA-SWAP.CaliberBlackHawkUAT1New.chi@mailinator.com		View Profile
Loan Officer	AAA-TWO,AAA-TWO.CaliberBlackHawkUAT1New.chi@mailinator.com	(555) 555-5555	View Profile
Loan Officer	AAAA-ONE,AAAA-ONE.CaliberBlackHawkUAT1New.chi@mailinator.com		View Profile
Loan Officer	AAA-TWENTY,AAATWENTY.CaliberBlackHawkUAT1New.chi@mailinator.com		View Profile
Loan Officer Assistant	AAATWENTY,AAATWENTYTWO.CaliberBlackHawkUAT1New.chi@mailinator.com		View Profile

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Manage Team: Add New Employee



Admins can add new employees to the Blueprint for Brokers 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 shows the Newrez portal interface. On the left, a sidebar menu contains the following items: Dashboard, My Pipeline, Create New Loan, Product & Pricing, Rate Sheet, Training, **Manage Team** (highlighted with a green arrow), Resources, Guidelines and Forms, and Marketplace. The main content area displays a table of employees with columns for Employee Role, Email Address, and Mobile Phone. A green arrow points from the 'Add New Employee' button in the top right corner of the main content area to the 'Manage Team' tab in the sidebar.

Employee Role	Email Address	Mobile Phone
Loan Officer	AAA-ONE.AAA-ONE.CaliberBlackHawkUAT1New.chl@mailinator.com	(972) 971-9742
Loan Officer	AAA-SWAP.AAA-SWAP.CaliberBlackHawkUAT1New.chl@mailinator.com	
Loan Officer	AAA-TWO.AAA-TWO.CaliberBlackHawkUAT1New.chl@mailinator.com	(555) 555-5555
Loan Officer	AAAA-ONE.AAAA-ONE.CaliberBlackHawkUAT1New.chl@mailinator.com	
Loan Officer	AAA-TWENTY.AAATWENTY.CaliberBlackHawkUAT1New.chl@mailinator.com	
Loan Officer Assistant	AAATWENTY.AAATWENTYTWO.CaliberBlackHawkUAT1New.chl@mailinator.com	

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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)

newrez AllRegs Contact Us Begin Live Chat Search by loan number or last name DMJ

Dashboard My Pipeline Create New Loan Product & Pricing Rate Sheet Training Manage Team Resources Guidelines and Forms Marketplace

Manage Team > Create New Employee **Create Employee**

Employee Details	Pipeline Access	Permissions
Account Employee Role* <input type="text" value="Loan Officer"/> Admin Controls <input type="radio"/> Yes <input checked="" type="radio"/> No		
Name Name must be an exact match with NMLS License First Name* <input type="text" value="Training"/> Middle Name <input type="text"/> Last Name* <input type="text" value="Broker"/> Suffix <input type="text"/>		
License Originator NMLS License #* <input type="text" value="8675309"/>		
Contact Office Phone Number* <input type="text" value="(214) 555-5555"/> Office Extension <input type="text"/> Cell Phone Number <input type="text"/> Email Address* <input type="text" value="training.broker@training.com"/>		

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Manage Team: Add New Employee, cont.

Step

3 Grant Pipeline Access (optional)

The screenshot shows the 'Create New Employee' page in the Newrez system. The 'Pipeline Access' tab is selected, displaying a table of employees and their access permissions. The table has three columns: 'Employee Name', 'Can Access undefined's Pipeline', and 'Sharing Pipeline with undefined'. The table lists several test accounts and one active employee, 'Deepaktest activate'.

Employee Name	Can Access undefined's Pipeline	Sharing Pipeline with undefined
AAA-ONE AAA-ONE	<input type="checkbox"/>	<input type="checkbox"/>
AAA-SWAP AAA-SWAP	<input type="checkbox"/>	<input type="checkbox"/>
AAA-TWO AAA-TWO	<input type="checkbox"/>	<input type="checkbox"/>
AAAA-ONE AAAA-ONE	<input type="checkbox"/>	<input type="checkbox"/>
AAA-TWENTY AAATWENTY	<input type="checkbox"/>	<input type="checkbox"/>
AAATWENTY AAATWENTYTWO	<input type="checkbox"/>	<input type="checkbox"/>
Test Account Aaron Lawrence BP Admin	<input type="checkbox"/>	<input type="checkbox"/>
abc abc	<input type="checkbox"/>	<input type="checkbox"/>
Test Account Abhijan Mohanty	<input type="checkbox"/>	<input type="checkbox"/>
Test Account	<input type="checkbox"/>	<input type="checkbox"/>
Deepaktest activate	<input type="checkbox"/>	<input type="checkbox"/>

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Manage Team: Add New Employee, cont.

Step

- 4 **Grant Permissions (optional)** ■ CL1 Permissions appear only when applicable.

The screenshot shows the 'Create New Employee' form in the Newrez system. The 'Permissions' tab is selected, displaying a list of permissions to be granted to the new employee. A green callout box indicates that an activation email will be sent upon clicking 'Create Employee'.

Permissions
Lock Permissions
<input type="checkbox"/> Lock Loans
<input type="checkbox"/> Change Loan Lock
<input type="checkbox"/> Extend Loan Lock
<input type="checkbox"/> Re-Lock Loan
CL1 Permissions
<input type="checkbox"/> Eligible to Offer CL1 Loans
<input type="checkbox"/> View CL1 Lock Confirmation and Pricing Detail
<input type="checkbox"/> Receives Purchase Advice for Loans

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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 shows the Newrez web application interface. The left sidebar contains navigation links: Dashboard, My Pipeline, Create New Loan, Product & Pricing, Rate Sheet, Training, Manage Team, Resources, Guidelines and Forms, and Marketplace. The main content area is titled 'Manage Team > Training Broker'. A profile card for 'Training Broker' is displayed. At the top of the card, a yellow message box states: 'This employee has not yet activated their account via the email link that was sent on 09/28/2022'. A green callout box with a blue arrow points to this message, containing the text: 'On screen message will indicate when the last activation email was sent to the employee.' In the top right corner of the profile card, there is a 'Resend Email' button. The profile card also includes fields for 'Employee Status' (Active/Inactive), 'Employee Role' (Loan Officer), 'Name' (First, Middle, Last, Suffix), 'License' (Originator NMLS License #), and 'Contact' (Office Phone Number, Office Extension, Cell Phone Number, Email Address).

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Manage Team: View Profile



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

The screenshot shows the Newrez 'Manage Team' interface. On the left is a sidebar with navigation links: Dashboard, My Pipeline, Create New Loan, Product & Pricing, Rate Sheet, Training, Manage Team (highlighted), Resources, Guidelines and Forms, and Marketplace. The main content area is titled 'Manage Team' and 'Employee Accounts'. It features a search box labeled 'Search by name or role' with a 'Show' button. A green 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, it says 'Showing all 305 active employees'. A table lists employees with columns: Employee Name, Employee Role, Email Address, and Mobile Phone. The table contains six rows of test accounts. To the right of the table is a vertical list of 'View Profile' links, each corresponding to a row in the table. A green arrow points from the first 'View Profile' link to the first row of the table.

Employee Name	Employee Role	Email Address	Mobile Phone
Approval, Counterparty Admin		Counterparty.Approval.CaliberBlackHawkUAT1New.chl@mailinator.com	(727) 373-8195
Arjun Ramachandra Broker, Test Account	Loan Officer	TestAccount.ArjunRamachandraBroker.scrub.chl@mailinator.com	
Auto Broker, Test Account	Loan Officer	TestAccount.AutoBroker.scrub.chl@mailinator.com	
Auto Joe Jones, Test Account	Loan Officer	TestAccount.AutoJoeJones.scrub.chl@mailinator.com	
Automation BR 5, Test Account	Loan Officer	TestAccount.AutomationBR5.CaliberBlackHawkUAT1New.chl@mailinator.com	
Automation BR 6, Test Account	Loan Officer	TestAccount.AutomationBR6.CaliberBlackHawkUAT1New.chl@mailinator.com	

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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> <div><div>Employee Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive</div><div>Employee Role Loan Officer</div><div>Admin Controls <input type="radio"/> Yes <input checked="" type="radio"/> No</div></div> <p>Name</p> <p>Name must be an exact match with NMLS License</p> <div><div>First Name Training</div><div>Middle Name</div><div>Last Name Broker</div><div>Suffix</div></div> <p>License</p> <p>Originator NMLS License # 8675309</p> <p>Contact</p> <div><div>Office Phone Number (214) 555-1212</div><div>Office Extension</div><div>Cell Phone Number (214) 555-5555</div></div> <p>Email Address training.broker@newrez.com</p>				

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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.

The screenshot shows the 'Employee Details' tab in a web application. The form is divided into several sections: Account, Name, License, and Contact. The 'Account' section includes fields for Employee Status (Active/Inactive), Employee Role (Loan Officer), and Admin Controls (Yes/No). The 'Name' section has a warning message: 'Name must be an exact match with NMLS License'. Below this are fields for First Name, Middle Name, Last Name, and Suffix. The 'License' section has a field for Originator NMLS License #. The 'Contact' section has fields for Office Phone Number, Office Extension, Cell Phone Number, and Email Address. A green callout box points to the 'Name' section with the text: 'Name must be an exact match with NMLS License.'

Employee Details	Pipeline Access	Credit Vendor Credentials	Permissions	Notifications
<p>Account</p> <p>Employee Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive Employee Role: <input type="text" value="Loan Officer"/> Admin Controls: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Name</p> <p>Name must be an exact match with NMLS License</p> <p>First Name: <input type="text" value="Training"/> Middle Name: <input type="text"/> Last Name: <input type="text" value="Broker"/> Suffix: <input type="text"/></p> <p>License</p> <p>Originator NMLS License #: <input type="text" value="8675309"/></p> <p>Contact</p> <p>Office Phone Number: <input type="text" value="(214) 555-1212"/> Office Extension: <input type="text"/> Cell Phone Number: <input type="text" value="(214) 555-5555"/></p> <p>Email Address: <input type="text" value="training.broker@newrez.com"/></p>				

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Manage Team: View Profile, cont.



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

Employee Name	<input type="checkbox"/> Can Access Training's Pipeline	<input type="checkbox"/> Sharing Pipeline with Training
AAA-ONE AAA-ONE	<input type="checkbox"/>	<input type="checkbox"/>
AAA-SWAP AAA-SWAP	<input type="checkbox"/>	<input type="checkbox"/>
AAA-TWO AAA-TWO	<input type="checkbox"/>	<input type="checkbox"/>
AAAA-ONE AAAA-ONE	<input type="checkbox"/>	<input type="checkbox"/>
AAA-TWENTY AAATWENTY	<input type="checkbox"/>	<input type="checkbox"/>
AAATWENTY AAATWENTYTWO	<input type="checkbox"/>	<input type="checkbox"/>
Test Account Aaron Lawrence BP Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
abc abc	<input type="checkbox"/>	<input type="checkbox"/>
Test Account Abhijan Mohanty	<input type="checkbox"/>	<input type="checkbox"/>
Test Account	<input type="checkbox"/>	<input type="checkbox"/>
Deepaktest activate	<input type="checkbox"/>	<input type="checkbox"/>



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](#)

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Manage Team: View Profile, cont.



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><div><div>Lock Permissions</div><div><input type="checkbox"/> Lock Loans</div><div><input type="checkbox"/> Change Loan Lock</div><div><input type="checkbox"/> Extend Loan Lock</div><div><input type="checkbox"/> Re-Lock Loan</div></div><div>CL1 Permissions</div><div><input checked="" type="checkbox"/> Eligible to Offer CL1 Loans</div><div><input type="checkbox"/> View CL1 Lock Confirmation and Pricing Detail</div><div><input type="checkbox"/> Receives Purchase Advice for Loans</div></div>				

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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 Newrez 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

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Record of Revisions

Update Date	Updated By	Revision Type	Summary of Changes
9/28/2022	Brian Rummell	Rebranding	Update screenshots and fonts.

