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WESTGEN LENDING

User Administration

Accessing the TPO Portal

Go to the following URL:

<https://7078682584.encompasstpoconnect.com/#/content/idplogin>

1. Enter your email address and password combination
2. Click [Log In]
3. Forgot Password will send you an email to reset your password

Note: From the TPO Portal Login page you can access our Resource Center links

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RESOURCE CENTER ▾

NEED ASSISTANCE?

Contact Us:

Call: 1-800-644-1258

E-Mail: clients@westgenloans.com

LOGIN

1 User Name

2 Password

Remember Me

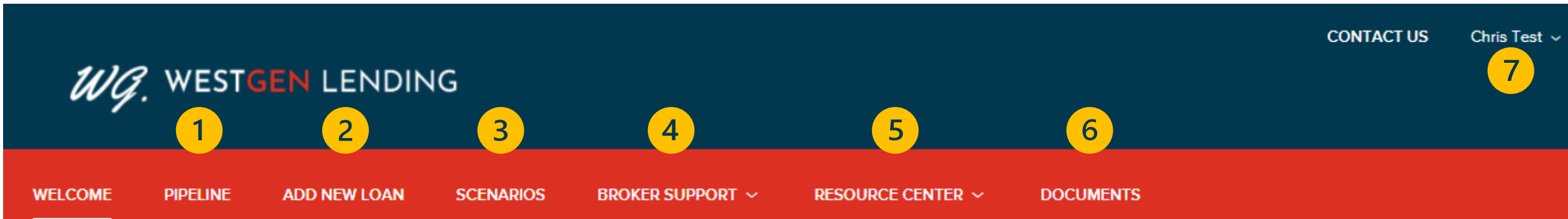
Login

Forgot Password? 3



Working with the TPO Portal

Welcome Page



Once your login credentials have been successfully authenticated, you will be taken to WestGen's Welcome Page and will be able to navigate through the following links:

1. Pipeline: Access your Pipeline View
2. Add New Loan
3. Scenarios: Get pricing for various loan services
4. Broker Support
5. Resource Center
6. Documents
7. Select dropdown menu to manage your account and logout

Change Password

To manage your login account, locate your name in the upper right-hand corner of the screen using the dropdown menu, select [Change Password].

Change Password Window

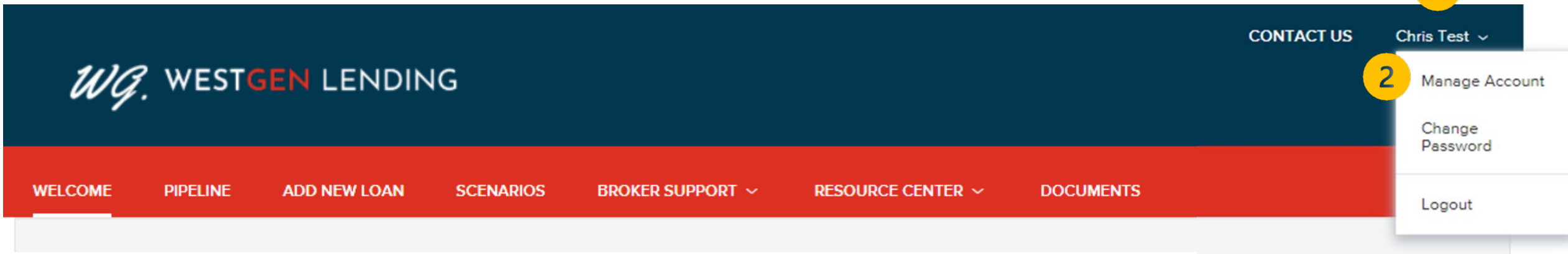
3. Enter your Current Password
4. Enter your New Password
5. Re-enter your New Password
6. Click [Save]

The screenshot illustrates the 'Change Password' process in the TPO Portal. In the top right corner, the user's name 'Chris Test' is displayed with a dropdown arrow. A yellow circle '1' highlights this area. The dropdown menu is open, showing options: 'Manage Account', 'Change Password' (highlighted with a yellow circle '2'), and 'Logout'. Below this, a 'Change Password' window is shown. It has a title bar with a close button. The email field is pre-filled with 'christopher@wq.com'. Three password fields are present: 'Current Password' (highlighted with a yellow circle '3'), 'New Password' (highlighted with a yellow circle '4'), and 'Re-enter New Password' (highlighted with a yellow circle '5'). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a yellow circle '6'.



Working with the TPO Portal

Manage Account



To manage your account, locate your name at the upper right-hand corner of the screen and using the dropdown menu, select [Manage Account]



Working with the TPO Portal

Manage Account

From the Personal Account tab, you can:

1. Edit Information
2. Add License(s)

The screenshot shows the 'Personal Account' tab selected in the top navigation bar. Below it, the 'My Information' section is displayed, featuring an 'Edit Information' button highlighted with a yellow circle containing the number 1. The 'My Licenses' section is also visible, featuring an 'Add License' button highlighted with a yellow circle containing the number 2.

My Information

Email Address	[Redacted]	Branch DBA Name	
First Name	[Redacted]	Company DBA Name	
Middle Name		Address	[Redacted]
Last Name	[Redacted]	City	Irvine
Login Status	Enabled	State	CA
Login Email Address	[Redacted]	Zip	92614
NMLS		Personas	TPO Loan Officer , TPO Loan Processor , TPO External Manager
SSN		Assigned AE	[Redacted]
Business Phone		Record Last Updated	10/20/20 11:14:38
Business Fax			
Cell Phone			

My Licenses

State	License #	Start Date	End Date	Status	Last Updated
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Edit Information

After selecting the [Edit information] button, a popup window will appear allowing edits to several fields.

1. Locate the item(s) you would like to change by entering the new or updated information
2. Click [Save]

Note: Fields which cannot be updated will appear in a light grey color

✕

*** Email Address**

*** First Name**

Middle Name

*** Last Name**

Login Status

*** Login Email Address**

NMLS ID

Social Security #

Branch

Use Company Address

Address

City

State

Zip -

Business Phone Ext.

Business Fax Ext.

Cell Phone Ext.

Personas

Assigned AE

Record Last Updated

1

2

Add License(s)

After selecting the [Add License] button, a My License popup window will appear allowing you to add, edit or delete any additional licenses.

1. My License Features
 - *Add Licenses* allows you to add a license(s)
 - Excel Icon: allows you to download your current licenses into an Excel CSV formatted file
 - The Printer icon allows you to print your licenses
2. Create License Record
 - Complete all required fields [*] when adding a new record
 - Click [Save]
3. To edit or delete an existing record, select the record and then select the appropriate action.

State	License #	Start Date	End Date	Status	Last Updated
CA	123-456789				

Create License Record [Close]

* License #

* Issue Date

* Start Date

* End Date

* Status

* License State

[Cancel] [Save]

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Questions?

clients@westgenloans.com