Correspondent Lending

LendingSpace: Admin quick-start guide

1.

Visit:
LendingSpace Portal

Create a user

From the Admin Center, select **Security Management**, then **Users Information**

Select **Add New** button to add a new user

Complete **"User Information"** section

Review role definitions in Job Aid **"Portal Users Administrator"** appendix

Assign role(s) to new user

Deselect the preselected option, then select the correct option

Save

To edit role assignment for existing user, select **user name** and change the role selection

2.

Log in:
Use your provided login credentials

Deactivate existing user

From the Admin Center, select **Security Management**, then **Users Information**

Select **user name** under **"Name"** column

Go to **"Login Information"**

Enter end date as MM/DD/YYYY

Enter end time as 24-hour (for example, 4 pm EDT would be entered as 1600 EDT)

Unlock existing user

From the Admin Center, select **Security Management**, then **Users Information**

Select **button** next to user name

Select **"Unlock"**

3.

Select:
Follow these steps for each task you want to complete

Assign password

From the Admin Center, select **Security Management**, then **Users Information**

Select **button** next to user name

Select **"Assign Password"**

Complete **Assign Password Details** section, then select **"Save"**

Reset password

From the Admin Center, select **Security Management**, then **Users Information**

Select **button** next to user name

Enter **login name** of user

Select **"Reset Password"**

Select **"Reset"**

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