



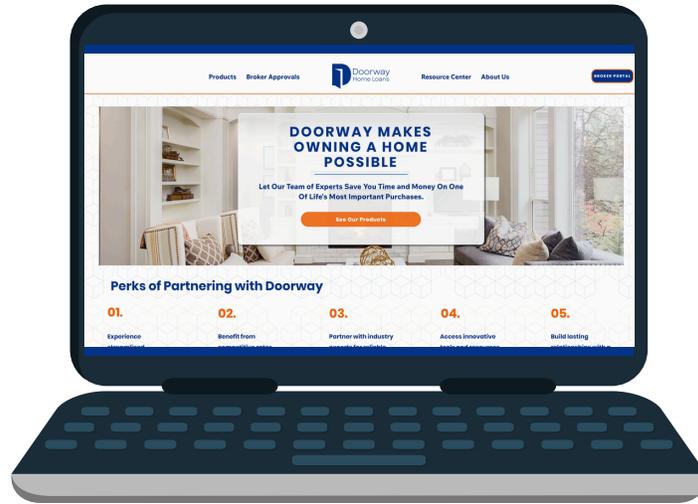
User Guide

Adding Contacts Through TPO

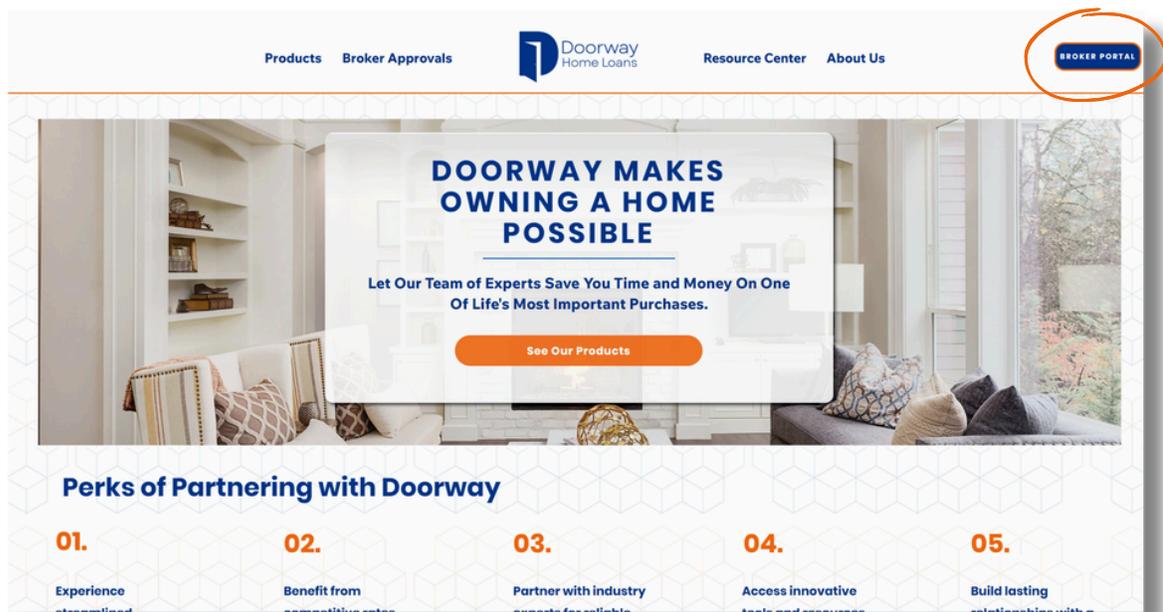
Last Updated 9/5/2024

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1 Visit DoorwayWholesale.com



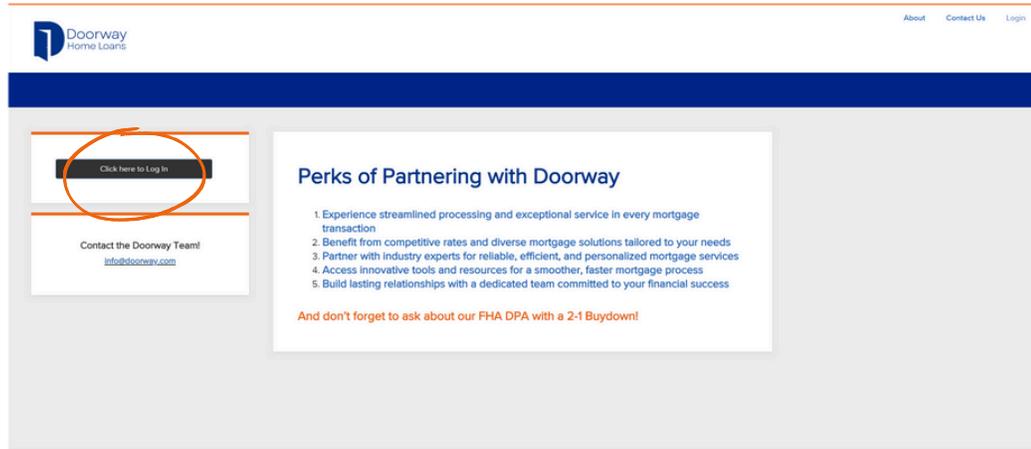
2 Click on the “[Broker Portal](#)” button on the top right side of the page



Adding Contacts Through TPO

3

Click on the button on the left side of the page to log in



4

Enter your credentials and click “Login”

A screenshot of a login form titled 'LOGIN'. It contains a 'User Name' input field, a 'Password' input field with an eye icon for visibility, a 'Remember Me' checkbox, and a blue 'Login' button. At the bottom, there is a 'Forgot Password?' link.

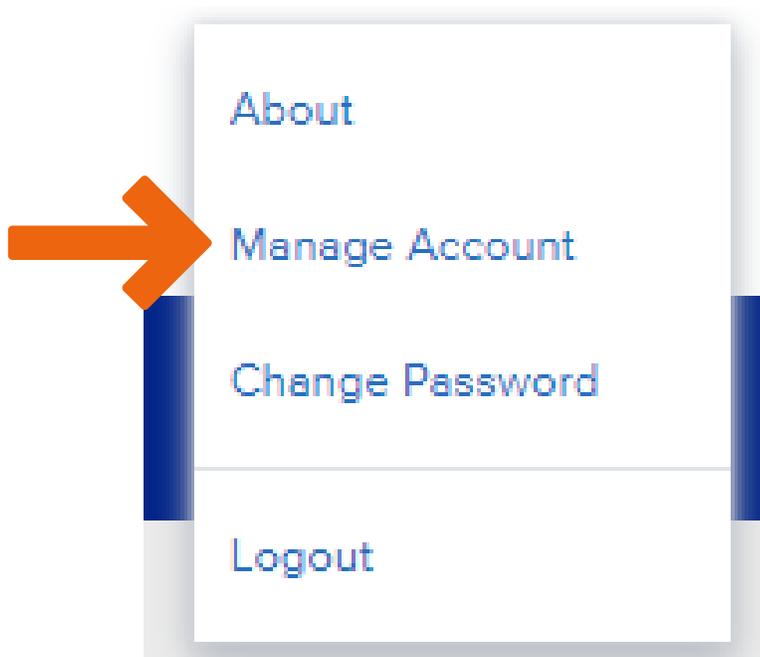
★ If you have forgotten your password, please click the "Forgot Password?" link and follow the prompts to reset it



Adding Contacts Through TPO

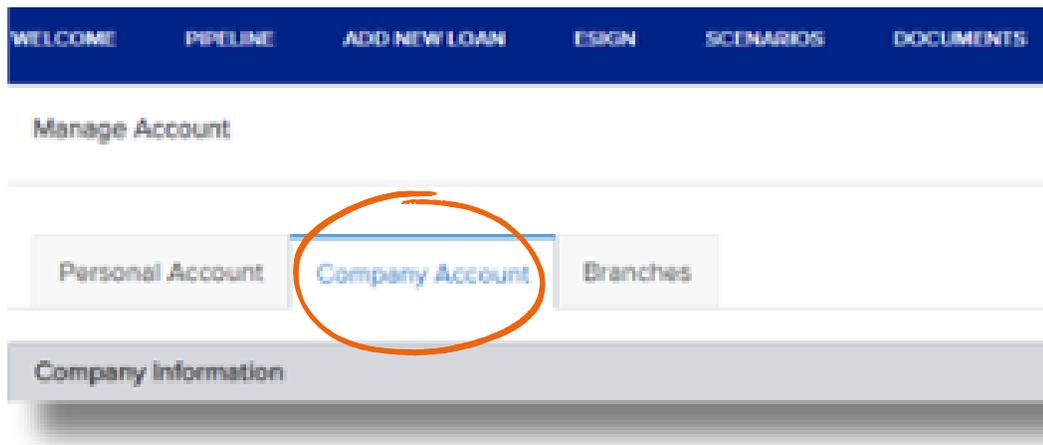
5

Click on your name in the top right hand side of the screen to access User Settings; click “Manage Account”



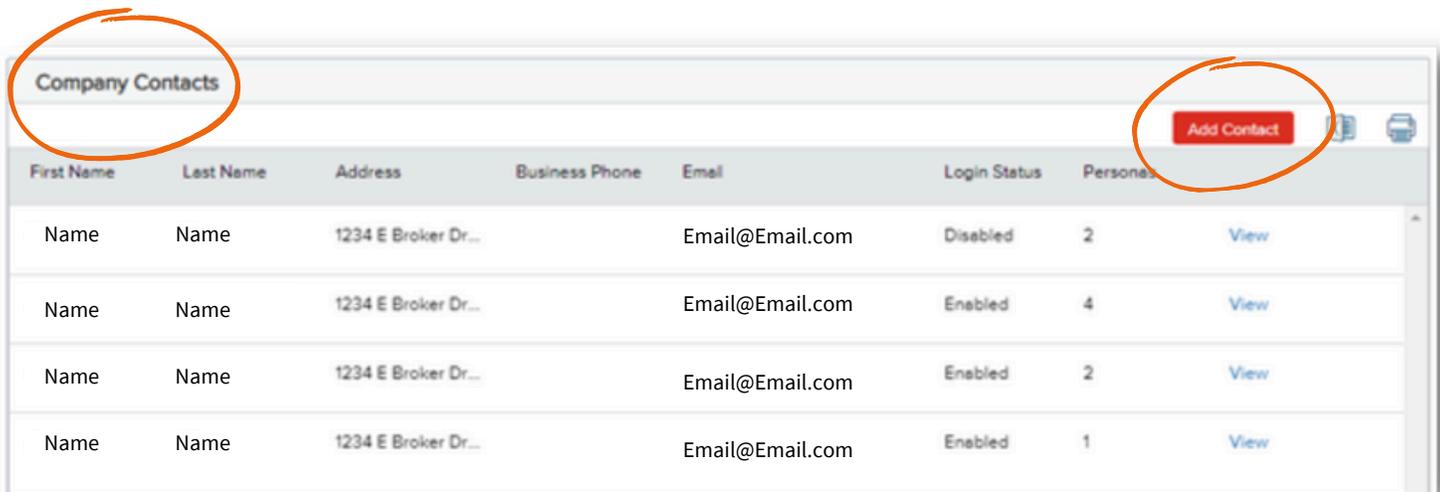
6

Click on the “Company Account” tab



Adding Contacts Through TPO

- 7 Scroll until you see “Company Contacts,” then click “Add Contact”



First Name	Last Name	Address	Business Phone	Email	Login Status	Personal	
Name	Name	1234 E Broker Dr...		Email@Email.com	Disabled	2	View
Name	Name	1234 E Broker Dr...		Email@Email.com	Enabled	4	View
Name	Name	1234 E Broker Dr...		Email@Email.com	Enabled	2	View
Name	Name	1234 E Broker Dr...		Email@Email.com	Enabled	1	View

Adding Contacts Through TPO

- 8 Input your contact's information in the required fields, then click "Save"

The screenshot shows a 'Create New Contact' form with the following fields and options:

- Email Address**: Required field (marked with an asterisk).
- First Name**: Text input field.
- Middle Name**: Text input field.
- Last Name**: Required field (marked with an asterisk).
- Login Status**: Dropdown menu, currently set to 'Enabled'.
- Login Email Address**: Required field (marked with an asterisk).
- NMLS ID**: Text input field.
- Social Security #**: Text input field with a mask of '###-##-####'.
- Organization**: Required field (marked with an asterisk) with a 'Choose' button.
- Use Company Address**: Checkbox.
- Address**: Text input field.
- City**: Text input field.
- State**: Required field (marked with an asterisk) with a dropdown menu.
- Zip**: Text input field with a hyphen separator.
- Business Phone**: Text input field with an **Ext.** field.
- Business Fax**: Text input field with an **Ext.** field.
- Cell Phone**: Text input field.
- Personas**: Required field (marked with an asterisk) with an **Add Persona** button.
- View access to team's loans**: Checkbox.
- Edit team's loans**: Checked checkbox.
- Assigned AE**: Dropdown menu, currently set to 'Brittney Bui'.
- Record Last Updated**: Text field showing '10/26/23 10:04:29'.

At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with an orange circle.



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9

Your contact has been added!



Other Useful Resources Now Available:

- *You are now able to update your personal profile information: name, company address, and contact information*
- *You can now add, edit, and delete your own licenses*





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Home Loans



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