

# Adding Broker Credit Providers



## XpressQual Administration—Set Up Broker Admin & Company Level Providers

Broker assigns an employee in their office to set up and maintain accounts.

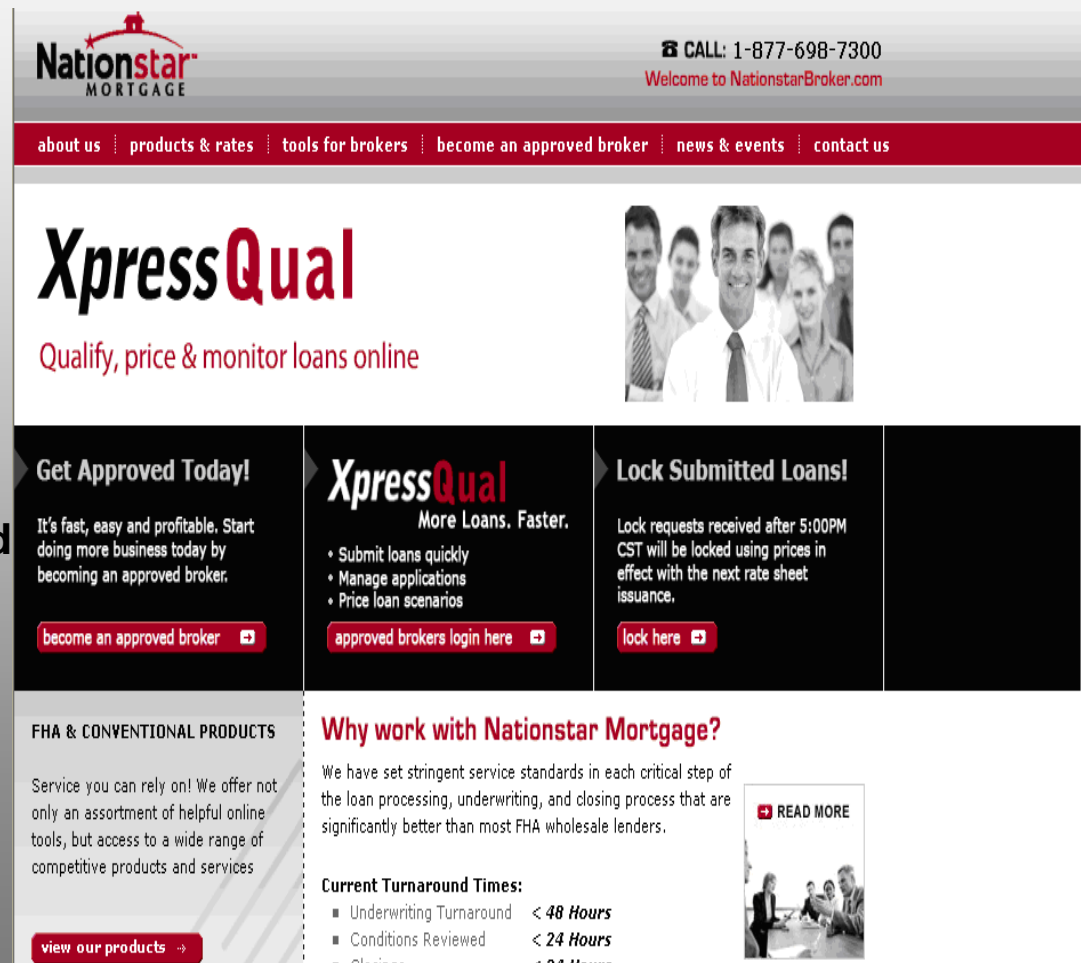
Responsibilities include:

- Perform administrative functions from the home screen of XpressQual.

To Set up the Broker Admin and Company Level Provider:

- Access XpressQual from the Broker website;  
[www.nationstarbroker.com](http://www.nationstarbroker.com)
- Click on the XpressQual login (center column)

2/22/2010



The screenshot shows the XpressQual website interface. At the top left is the Nationstar Mortgage logo. At the top right, it says 'CALL: 1-877-698-7300' and 'Welcome to NationstarBroker.com'. Below this is a navigation bar with links: 'about us', 'products & rates', 'tools for brokers', 'become an approved broker', 'news & events', and 'contact us'. The main heading is 'XpressQual' with the tagline 'Qualify, price & monitor loans online' and a photo of a smiling man. Below this are three columns of promotional text:

- Get Approved Today!**  
It's fast, easy and profitable. Start doing more business today by becoming an approved broker.  
[become an approved broker](#)
- XpressQual More Loans. Faster.**  
• Submit loans quickly  
• Manage applications  
• Price loan scenarios  
[approved brokers login here](#)
- Lock Submitted Loans!**  
Lock requests received after 5:00PM CST will be locked using prices in effect with the next rate sheet issuance.  
[lock here](#)

At the bottom left, there is a section for 'FHA & CONVENTIONAL PRODUCTS' with a 'view our products' link. At the bottom right, there is a section titled 'Why work with Nationstar Mortgage?' with a 'READ MORE' link and a photo of people in an office.

## XpressQual Administration—Logging In

- Brokers will receive their Broker Admin usernames and passwords from their CRR's once they are "approved" by NSM
- Individual users (set up by Broker Admin) will use their PIN as the password to get back in (ie 1234). PIN = 1234
- They will be prompted to change their password

**Note: When the Broker Admin goes into reset the password for someone, there will be an automated email that will be sent to the user advising their password has been reset.**



The screenshot shows the login interface for XpressQual. At the top left, there is a blue header with the word "Login" in white. Below this, on the left side, is a "What's New" section with a dashed line separator. The text in this section reads: "If this is your first time logging in, congratulations and welcome! You NOW have access to all available products and prices at the click of a button. If that doesn't catch your attention, the Deal Structuring Screen, along with the custom findings reports will. The combination of features is certain to help you close more loans, faster! If you need assistance logging in, please contact your administrator for support." To the right of this text are two input fields: "USERNAME:" followed by a text box, and "PASSWORD:" followed by a text box. At the bottom right of the page, there is a blue button with the word "Login" in white.

## XpressQual Administration---Adding Company Level Providers

The Broker Admin at each company will navigate to their company profile in the XQ admin section to add the new credit provider credentials

Administration

**Note: FIRST TIME USERS!**  
You must 1st set up your company credit provider and users.

User Admin

Choose User Administration  
Click on the Company Name to open "your" company

Company Profile Info will default

2/22/2010

## XpressQual Administration---Company vs. User Level

- If User Level is selected, the user preferences screen will not appear automatically. Each loan officer for that particular company will need to go into their own preferences section and add their own credentials –ADM will NOT perform this function
- For 1 provider account (e.g., American Credit), choose Company Level Provider



**Choose Company Level Provider if your broker company has one established provider account**

### Company

\* Name:

\* Type:

Channel:

---

**Address**

Street:

City:

State:

Zip:

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**Credit Provider Usage: (Select one)**

Company Level Provider       User Level Provider

---

**Credit Provider Credentials**

CRA Name	Account Number	Branch ID	User ID
<input type="button" value="Add Provider"/>			
<input type="button" value="Save"/> <input type="button" value="Delete"/>			



**Choose User Level Provider if your brokers each have their own individual provider accounts**

**•Brokers have the ability to choose two options for credit provider set up in Xpressqual. One credit provider can continue to be set up for all users in the company, or brokers now have an option to set up each user with their own preferred credit provider account instead.**

## XpressQual Administration---Adding Company Provider Credentials

If all loan officers are using the same credit provider (e.g., Landsafe) with the same account number, choose company level provider

- Broker Admin can set Up all users in the company under 1 company provider

**Note:** You must choose one button prior to adding new Credit Provider

- Broker Admin will select the Company profile screen through the "Administration" options in XpressQual
- The Loan Prospector TPO field will be located in the top section
- Enter the LP TPO number and LP TPO Password is entered, ---"Save".

### Company

\* Name:

\* Type:

Channel:

LP TPO #:  LP TPO Password:

---

**Address**

Street:

City:

State:  Zip:

---

**Credit Provider Usage: (Select one)**

Company Level Provider  User Level Provider

---

**Credit Provider Credentials**

CRA Name	Account Number	Branch ID	User ID	
001: First American CREDCO	145372			✗
904: First American CREDCO Test	4162957			✗
907: INFO1/LandAmerica Test	TST0124	07	Testuser	✗
054: LandSafe	ALYSSATEST			✗
052: Kroll Factual Data	0103TJ0029			✗
912: Equifax Mortgage Solutions Test	999NSM1231			✗

**Remember!**  
Only one of the radio buttons can be selected at a time

# XpressQual Administration---Adding Individual User Accounts

**Remember!**  
**First time users-**  
**You must 1st set up your credit provider**

**Choose Administration on the left**

**User provider is most commonly used by Brokers so each loan officer can choose their own provider and have their own specific account**

**Choose Add User**

The screenshot shows the XpressQual Administration interface. On the left, a navigation menu is visible with the following items: Home, Global, Pipeline View, New Application, Upload Application, Reassign Case, Preferences, Administration (circled in red), and Logout. A red arrow points from the text 'Choose Administration on the left' to the 'Administration' menu item.

The main content area is divided into two sections. The top section, titled 'Cases', contains filter options and a table of cases. The filter options include 'Status Filter', 'Case Owner', 'Company', 'From (mm/dd/yyyy)', and 'Through (mm/dd/yyyy)'. The 'Cases' table has columns for Case#, Primary Borrower, Created Date, Status, Last Modified Date, Case Owner, Company, RESPA, and Restr. The table contains 15 rows of case data.

The bottom section, titled 'System Administration', shows a tree view of the system structure. The tree view includes 'Administration', 'User Administration', 'TEST BROKER COMPANY(aa66)', and 'Users'. Under 'Users', there is an 'Add User' option (circled in red) and several existing users: testbroker1 (Test Broker1), testbroker2 (Test Broker2), testbroker3 (Test Broker3), and testbrokeradmin (Test Brok). A red arrow points from the text 'Choose Add User' to the 'Add User' option.

To the right of the 'System Administration' tree view is a 'User' form. The form includes fields for 'Username (login)', 'User Status' (set to Active), 'First Name', 'Middle Name', 'Last Name', 'Preferred Language', 'Work Phone', 'Mobile Phone', and 'Email'.

## XpressQual Administration---Adding Individual Users

### Setting Up Users

- Complete fields
- Include a password and pin number.
- Choose "save"

**Note:** Initial password =password (lower case)  
PIN is "1234"

**Remember!** Welcome email will be automatically sent to the address entered with the new login information. The broker admin will also need to send a separate email to the new user informing them of their temporary password to use when logging in for the first time.

**Note:** Only the Broker Admin should choose XQ Broker Admin Role- XQ Broker User is for loan officers/processors

Choose 1 XQ Role Type Here!

### User

**Username (login):** brokeruser1

**^ User Status:** Active

**^ First Name:**

**Middle Name:**

**^ Last Name:**

**Preferred Language:**

---

**Contact**

**Work Phone:**

**Mobile Phone:**

**^ Email:**

---

**Password**

**^ Password:**

**^ Confirm Password:**

**^ Pin:**

**^ Confirm Pin:**

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**Roles**

XQ Broker Admin

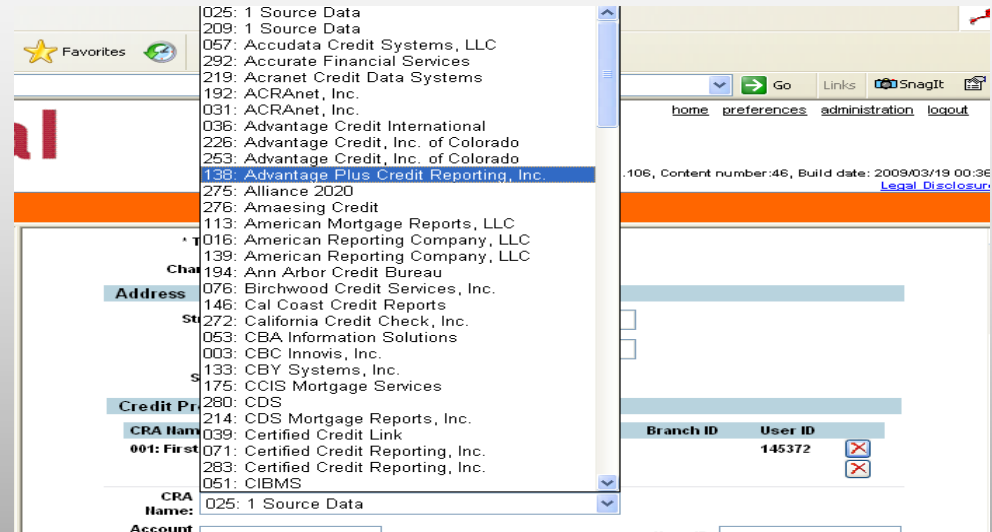
XQ Broker User

## XpressQual Administration---Setting Up Individual Users Accounts

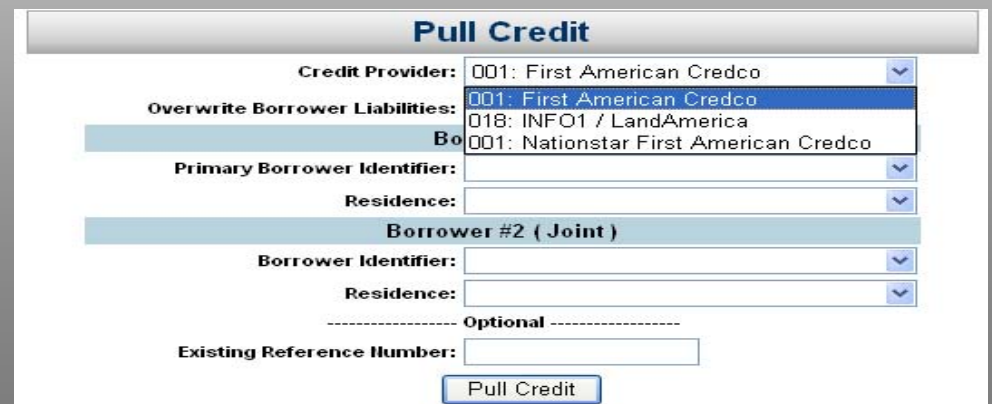
Click on Add Provider and choose CRA Name from Drop down list:

Varies by credit provider depending on the provider, the following information may/may not be required:

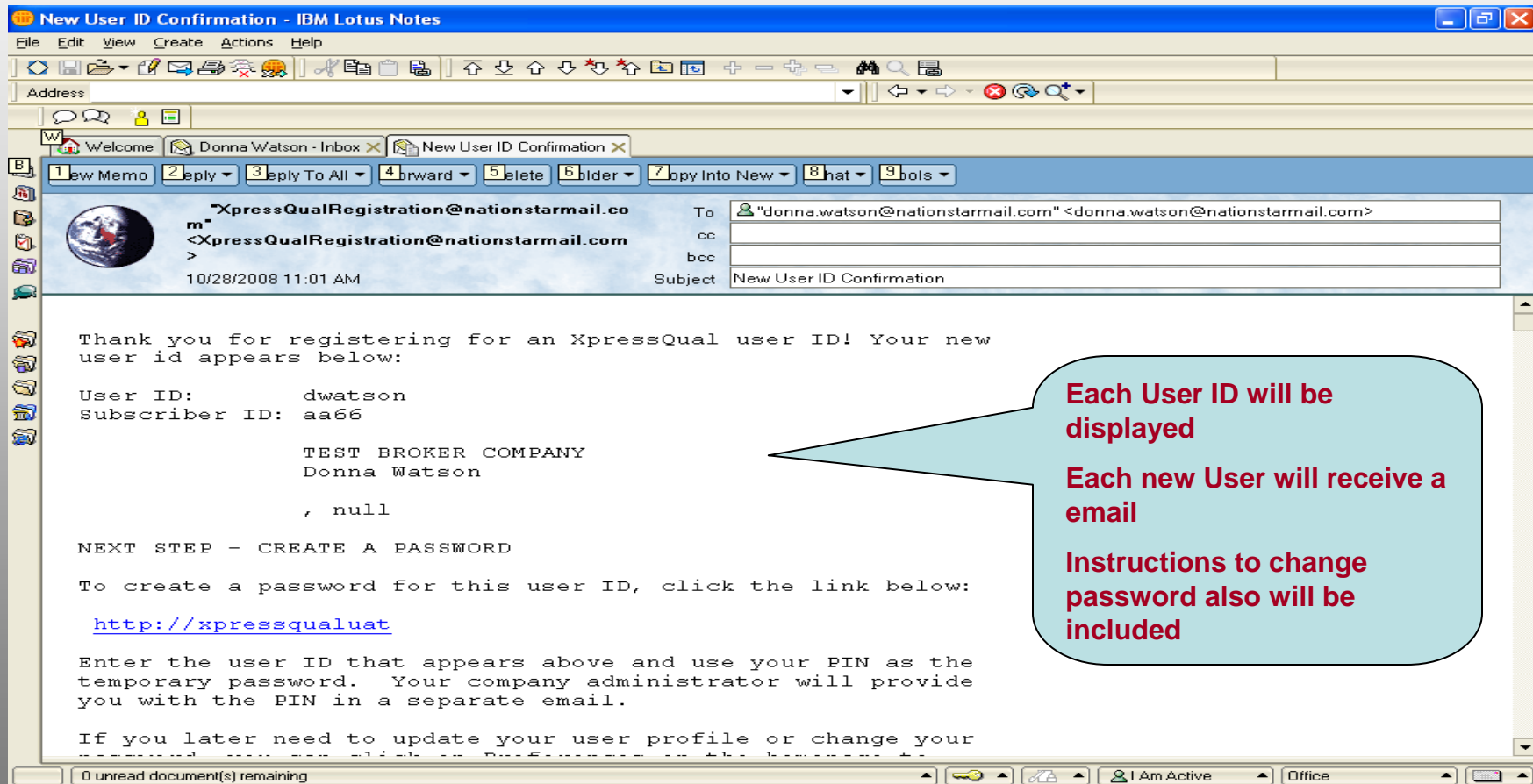
- Complete Account Number
- Complete User ID/Password
- Complete Branch ID



Click on Save Provider to complete the process. The new credit provider will now be available in the drop down list on the Pull Credit Screen in XQ



## XpressQual Administration---Sample Email



**New User ID Confirmation - IBM Lotus Notes**

File Edit View Create Actions Help

Address

Welcome Donna Watson - Inbox New User ID Confirmation

1 New Memo 2 Reply 3 Reply To All 4 Forward 5 Delete 6 Hide 7 Copy Into New 8 Hat 9 Tools

**XpressQualRegistration@nationstarmail.co**  
m-  
<XpressQualRegistration@nationstarmail.com>

To: "donna.watson@nationstarmail.com" <donna.watson@nationstarmail.com>  
cc:  
bcc:  
Subject: New User ID Confirmation

10/28/2008 11:01 AM

Thank you for registering for an XpressQual user ID! Your new user id appears below:

User ID: dwatson  
Subscriber ID: aa66

TEST BROKER COMPANY  
Donna Watson

, null

NEXT STEP - CREATE A PASSWORD

To create a password for this user ID, click the link below:

<http://xpressqualuat>

Enter the user ID that appears above and use your PIN as the temporary password. Your company administrator will provide you with the PIN in a separate email.

If you later need to update your user profile or change your password, you can click on "My Profile" on the homepage to

0 unread document(s) remaining

I Am Active Office

**Each User ID will be displayed**

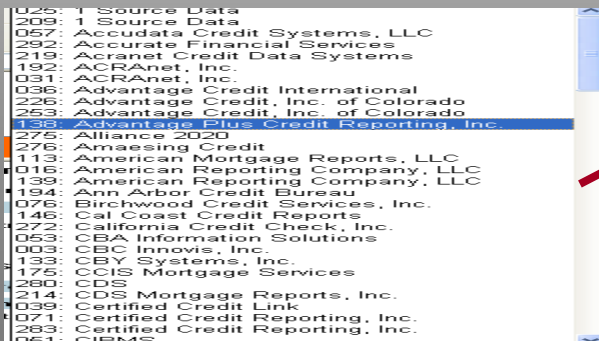
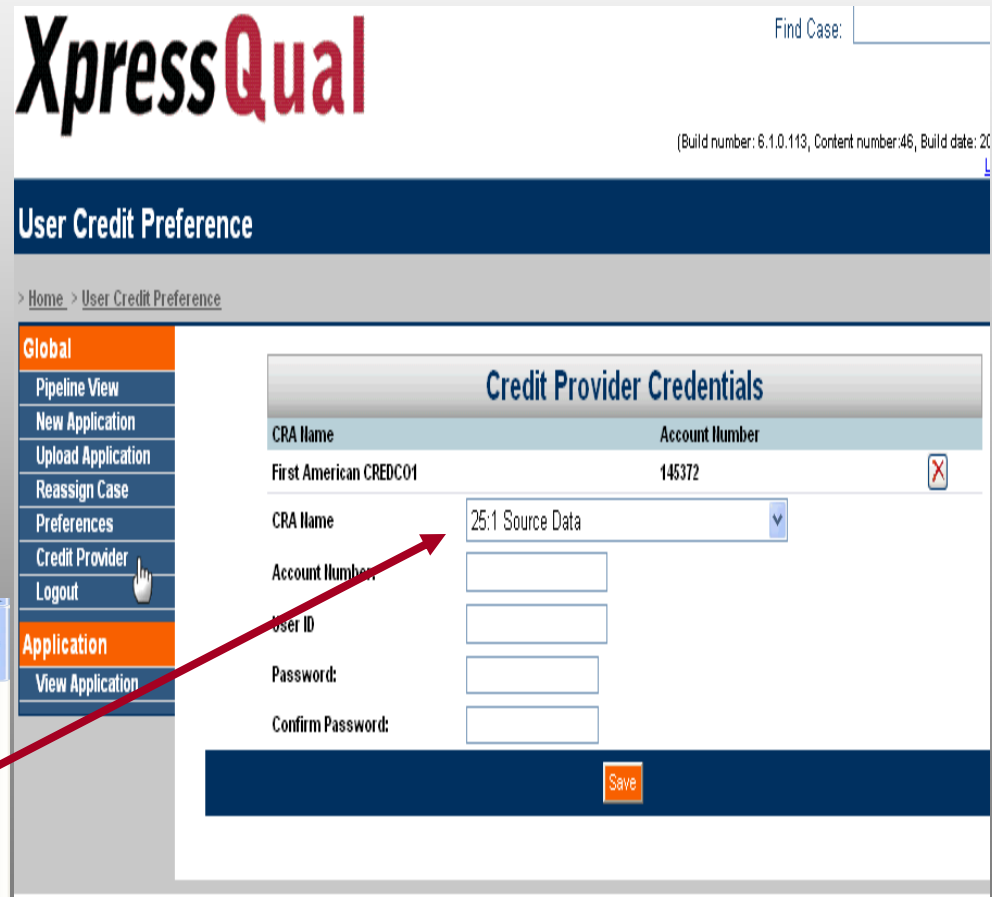
**Each new User will receive a email**

**Instructions to change password also will be included**

## XpressQual Administration---Setting Up Individual Users

### Setting Up Individual Accounts

- Log into Xpressqual
- Choose credit provider tab
- User will see the full list on the Credit Provider screen
- CRA drop down list will contain the same list of current credit providers
- Add the information and click "Save".

## XpressQual Administration---LP TPO #'s

- Brokers must log on to [www.loanprospector.com](http://www.loanprospector.com) to receive their LP TPO # and Password
- Brokers must be signed up with LP and associated with NSM in Loan Prospector
- These numbers are used to track credit report usage for Freddie Mac loans
- This number and password is only needed for Freddie Mac loans

**Note:** A 7 digit entry will be required; otherwise an error message will be displayed indicating: *"Loan Prospector TPO # should contain 7 digits. Please correct in order to save your changes."*

For more information, go to "you" /operations/ LP/TPO for specific instructions for brokers

### Company

\* Name:

\* Type:

Channel:

LP TPO #:

LP TPO Password:

**Address**

Street:

City:

State:  Zip:

**Credit Provider Usage: (Select one)**

Company Level Provider  User Level Provider

**Credit Provider Credentials**

CRA Name	Account Number	Branch ID
001: First American CREDCO	145372	
904: First American CREDCO Test	4162957	
907: INFO1/LandAmerica Test	TST0124	07
054: LandSafe	ALYSSATEST	
052: Kroll Factual Data	0103TJ0029	
912: Equifax Mortgage Solutions Test	999NSM1231	

**Broker may already have TPO # and password, if not must secure # from loan prospector**

## XpressQual Administration---Reassigning a Case

- The purpose of reassigning a case is for use in the event that the active cases need to be assigned to another user (e.g., LO leaves Broker office)
- From the Home page on the left side in section Global click on Reassign Case.



**Note:** The Broker Admin is responsible for the upkeep of users on their company account. If employees leave the company and their user ID is not marked as "locked" they will still be able to access it later.



The screenshot shows the 'Reassign Cases' page in the XpressQual system. At the top left is the Nationstar Mortgage logo. Below it is a navigation menu with 'Global' selected. The main content area has a 'Filter by User:' dropdown set to 'testbrokeradmin (Test BrokerAdmin)'. Below that is a 'Reassign Selected Cases To' dropdown set to 'dwatson (Donna Watson)' with a 'Save' button. A table lists three cases with columns for Case #, Primary Borrower, Created On, Status, Status Date, and User.

Case #	Primary Borrower	Created On	Status	Status Date	User
<a href="#">01001759</a>	Credco, Angela	10/24/2008	Decision	10/27/2008 3:32:46 PM	BrokerAdmin, Test
<a href="#">01001765</a>	Credco, Angela	10/26/2008	Decision	10/27/2008 3:33:03 PM	BrokerAdmin, Test
<a href="#">01001802</a>	Credco, Angela	10/27/2008	Decision	10/27/2008 3:34:38 PM	BrokerAdmin, Test

At the bottom right of the table area, there are links for 'Select All' and 'Clear'.

## Take Aways:

- Broker will assign a Broker Administrator to set up company and user providers
- Initial password is “password” and PIN is “1234”
- Emails will be sent to each user with logins and passwords
- Broker Admins can add credit provider credentials by company or user level provider
- User credit providers can be added for individual loan officers
- LP TPO numbers are assigned by loan prospector to each broker and must be associated with NSM
- Reassigning a case is utilized for assigning a case/loan to another user

**Need HELP!**

**Call 1-877-698-7300-**

**Opt # 1 for Sales**

**Or Call Your Account Executive  
Directly**