

## Quontic Bank Wholesale Connect: TPO Admin User Guide

Please follow these instructions to successfully add users using the Quontic Bank Wholesale Connect portal.

Once you have received your welcome email, sign into <https://6626794247.encompasstpoconnect.com> using the provided login credentials.

### ***Welcome email example:***

Dear <Your Name>,

A new QUONTIC BANK website account has been created for you. You may now manage your QUONTIC BANK loans electronically through our online portal using the account information included below.

- Company: <Your Company Name>
- QUONTIC BANK Account Executive : <Your Quontic Bank Account Executive>

Account Details:

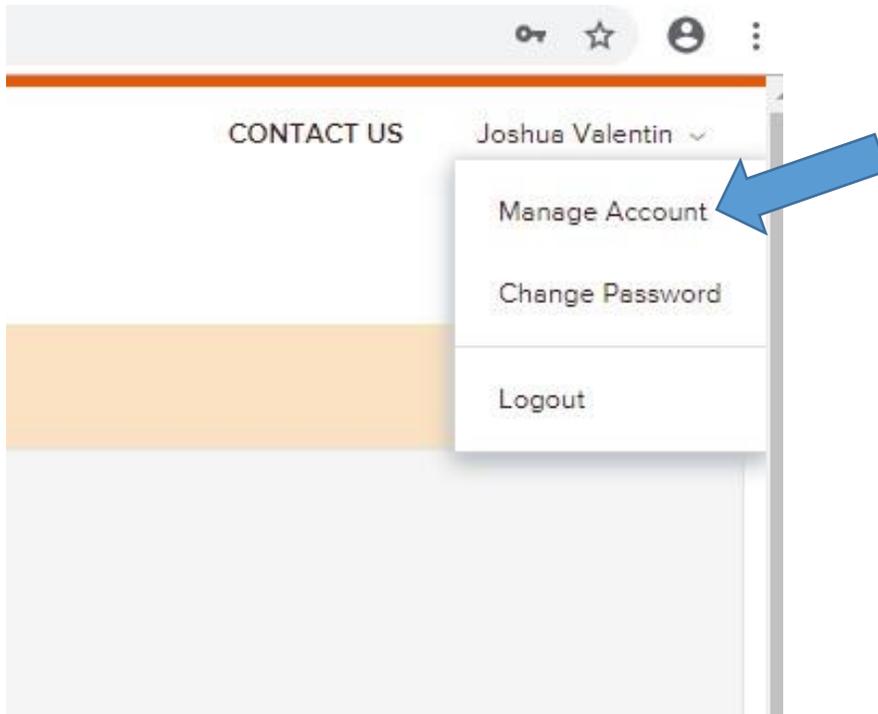
- Email Address: <Your Email Address>
- Password: <Password>

You will have access to the following site(s) with your login information:

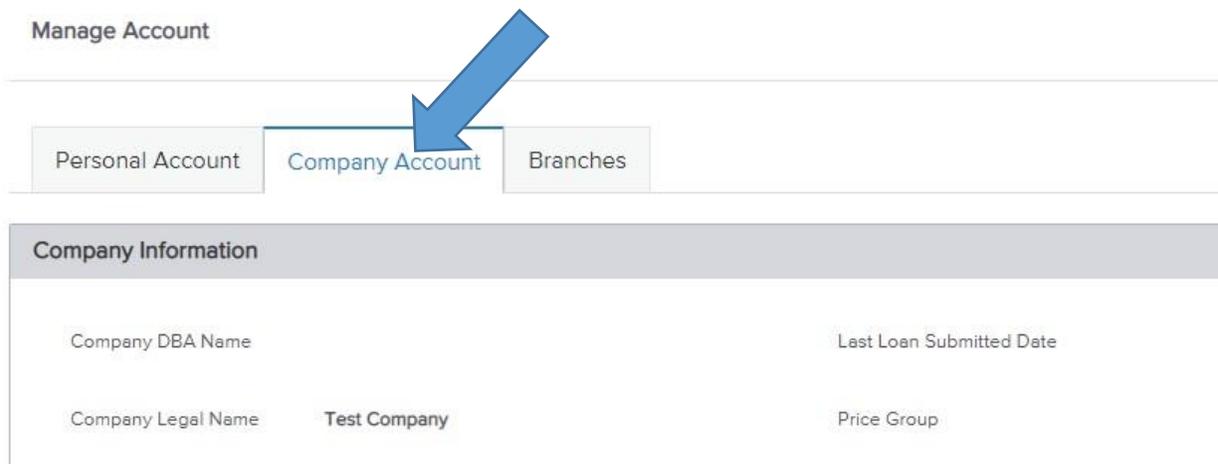
6626794247.encompasstpoconnect.com

Thank you,  
QUONTIC BANK

After successfully logging in, click on your name at the top right of the home page. A drop down menu will appear giving you three options: Manage Account, Change Password, and Logout. **Click on Manage Account.**



Under the Manage Account page, **click on the Company Account tab.** This will bring you to your company's information screen.



Under Company Contacts, **Click Add Contact.**

Company Contacts						
First Name	Last Name	Address	Business Phone	Email	Login Status	Persones
					<input type="button" value="Add Contact"/> <input type="button" value="X"/> <input type="button" value="Print"/>	



Then enter your user's information. *Please note a user's information must reflect their NMLS number. Any false information will NOT be accepted.*

Create New Contact
✕

\*Email Address

\* First Name

Middle Name

\* Last Name

Login Status

NMLS ID

Social Security #

\* Organization

Use Company Address

Address

City

\* State  ▾

Zip  -

Business Phone  Ext.

Business Fax  Ext.

Cell Phone

\* Persones

View access to team's loans

Edit team's loans

Assigned AE

Record Last Updated

### Persona Settings

Click **Add Persona** and select the persona(s) that best fits the user's job function. Click **Save** once you are done.

Cell Phone

\* Personas

View access to team's loans

Edit team's loans

Contact Persona ✕

Joshua Valentin

**Personas**

- TPO Admin
- TPO - Loan Processor
- TPO Loan Officer

Once you have entered all the user's information, **click Save** and a welcome email with their username and password will be sent to their inbox.

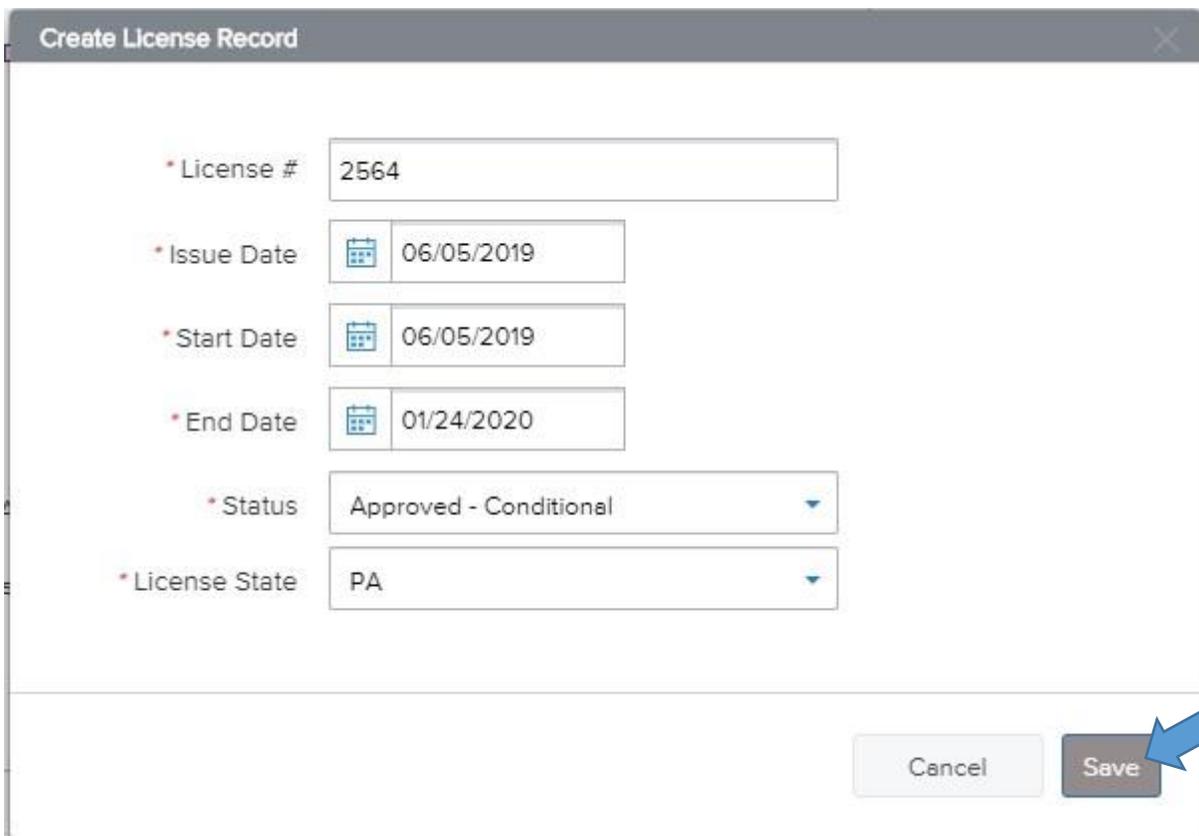
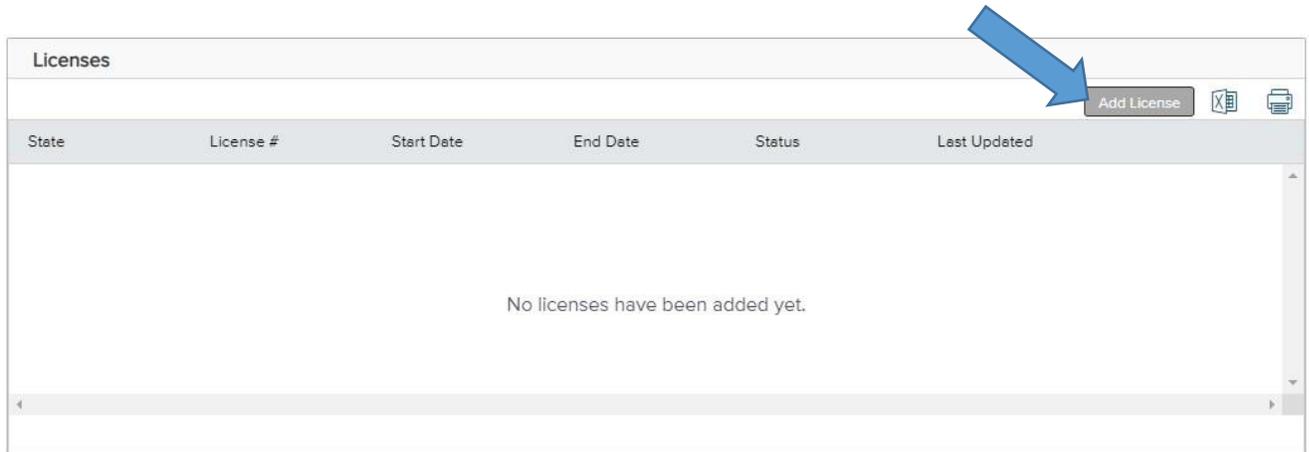
The image shows a 'Create New Contact' form with the following fields and values:

- \* Email Address: Test@test.com
- \* First Name: Test
- Middle Name: (empty)
- \* Last Name: Test
- Login Status: Enabled
- NMLS ID: 111111
- Social Security #: ###-##-#### (with a refresh icon)
- \* Organization: Test Company/ (with a 'Choose' button)
- Use Company Address
- Address: 3105 Broadway
- City: Astoria
- \* State: New York (dropdown menu)
- Zip: 11106 - (with a refresh icon)
- Business Phone: 111-111-1111 (with an 'Ext.' field)
- Business Fax: 222-222-2222 (with an 'Ext.' field)
- Cell Phone: (empty)
- \* Persones: TPO Loan Officer (with an 'Edit Persona' button)
- View access to team's loans
- Edit team's loans
- Assigned AE: Joshua Valentin
- Record Last Updated: 10/30/19 2:46:50

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. A blue arrow points to the 'Save' button.

### Add State Licenses

You can add State Licenses to your user's profile by **selecting View** next to their profile, scrolling down to Licenses, and **clicking Add License**.



The screenshot shows the "Create License Record" form with the following fields:

- \* License #: 2564
- \* Issue Date: 06/05/2019
- \* Start Date: 06/05/2019
- \* End Date: 01/24/2020
- \* Status: Approved - Conditional
- \* License State: PA

At the bottom right of the form, there are two buttons: "Cancel" and "Save". A blue arrow points to the "Save" button.

**Press Save** once you are done adding a license.

## How to disable or delete a person

Go to company account tab

Click View next to the person's name

Assigned AE's: Gianna M Stringer, FHA Compare Ratio: 0.0000

AE Email Addresses: gstringer@quonticbank.com, USDA Originator

### Company Contacts

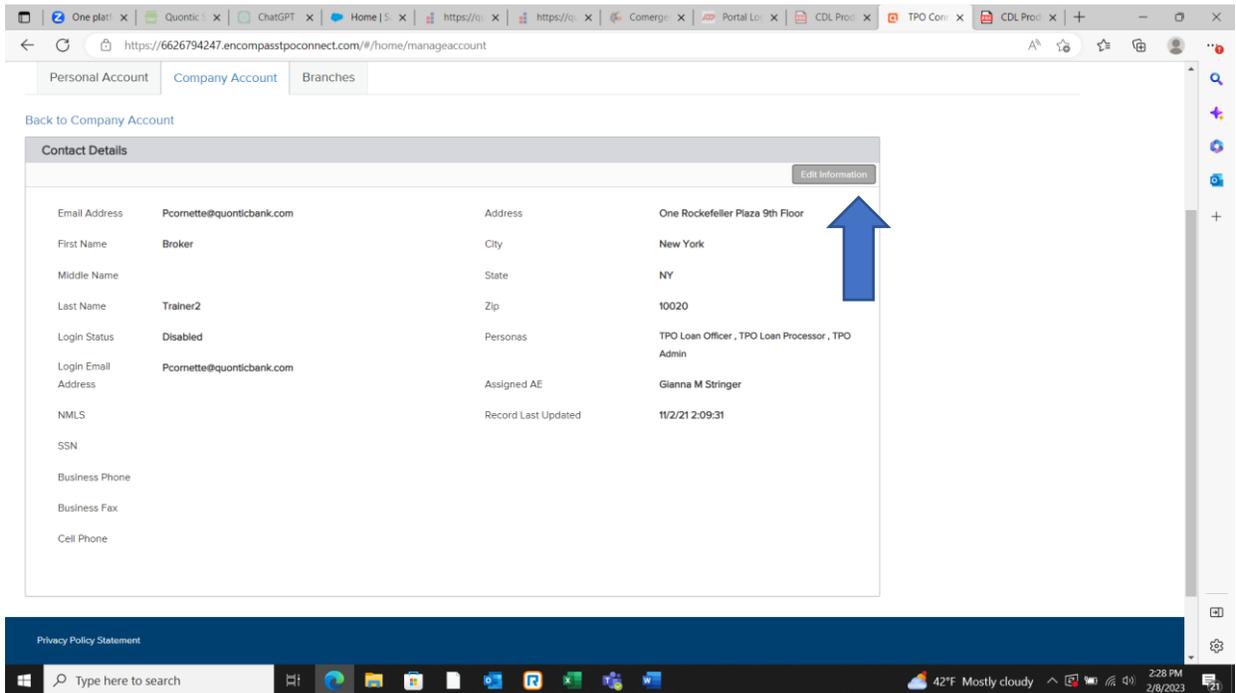
First Name	Last Name	Address	Business Phone	Email	Login Status	Personas		
Peggy	Cornette	One Rockefeller ...		pcornette@quonticbank.com	Enabled	1	<a href="#">View</a>	<a href="#">Delete</a>
Broker	Trainer	One Rockefeller ...		gstringer@quonticbank.com	Enabled	3	<a href="#">View</a>	<a href="#">Delete</a>
Broker	Trainer2	One Rockefeller ...		Pcornette@quonticbank.com	Disabled	3	<a href="#">View</a>	<a href="#">Delete</a>

10 per page | 1

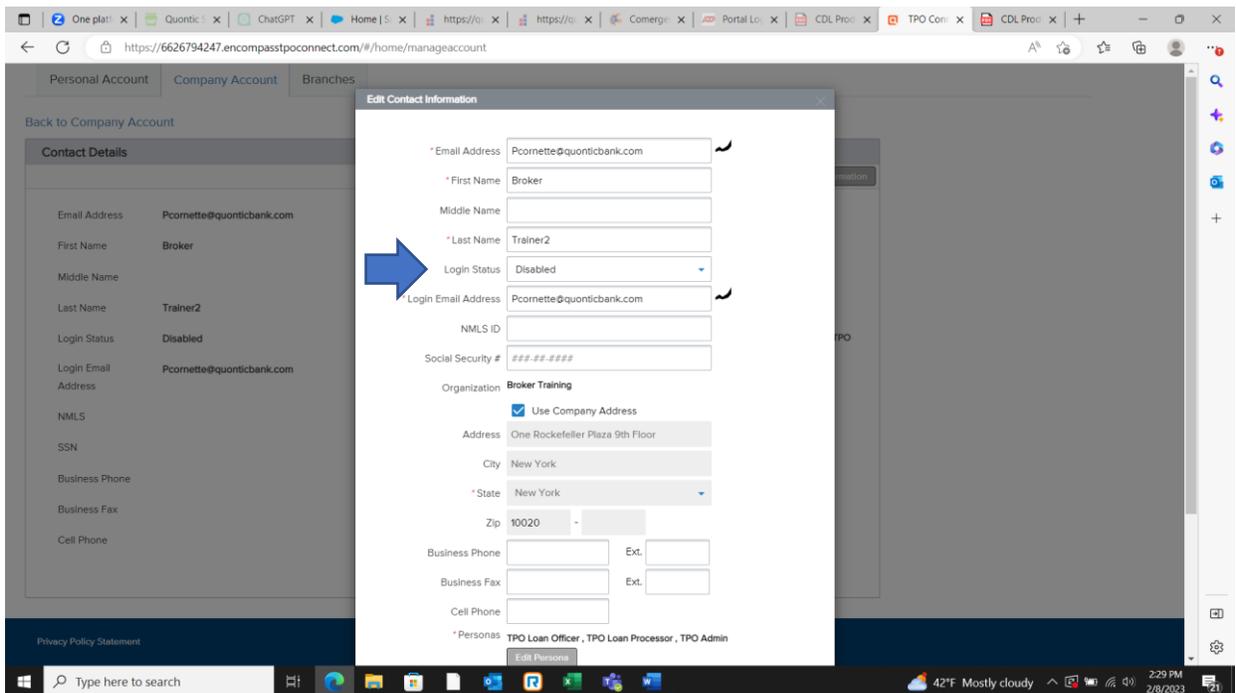
Privacy Policy Statement

Windows taskbar: Type here to search, 42°F Mostly cloudy, 2:26 PM 2/8/2023

Once in then click on edit information

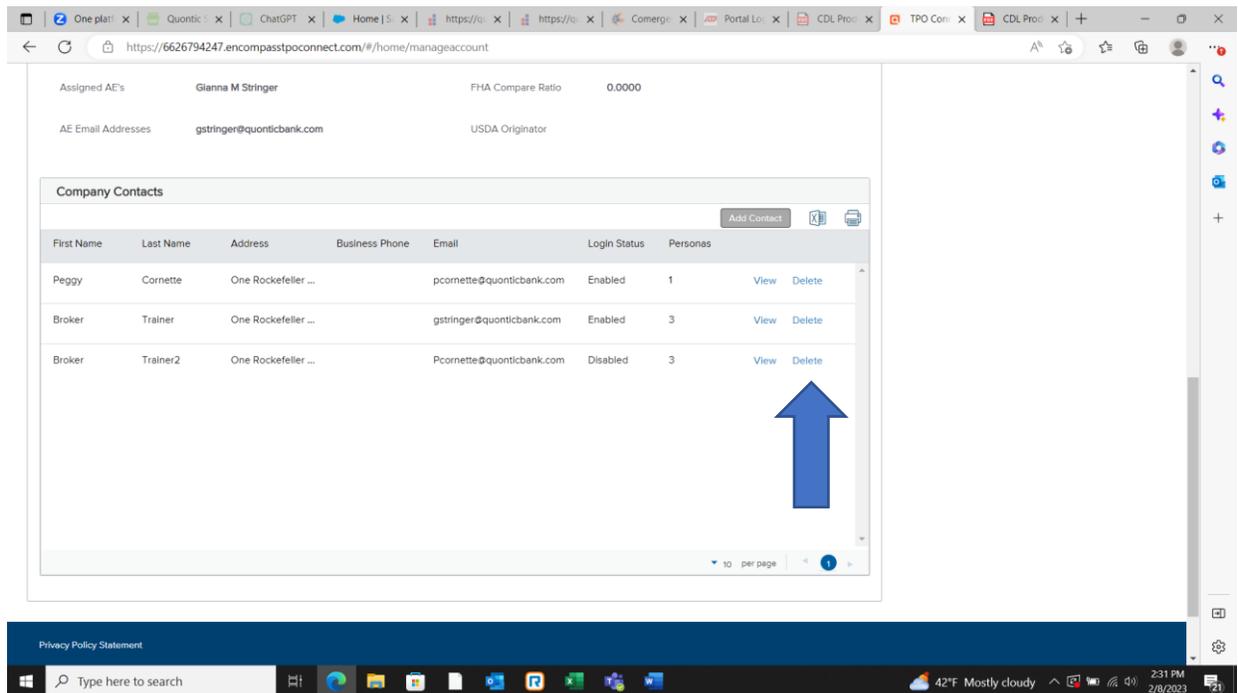


Then click on login status and change to disable



## To delete a person

Go into the Company account tab  
Click on delete by the person's name



The screenshot shows a web browser window with the URL <https://6626794247.encompasspoconnect.com/#/home/manageaccount>. The page displays account information for Gianna M Stringer, including assigned AEs, email addresses, and FHA Compare Ratio. Below this is a 'Company Contacts' table with columns for First Name, Last Name, Address, Business Phone, Email, Login Status, and Personas. A blue arrow points to the 'Delete' link in the 'Personas' column for the contact named 'Trainer2'.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas		
Peggy	Cornette	One Rockefeller ...		pcornette@quonticbank.com	Enabled	1	View	Delete
Broker	Trainer	One Rockefeller ...		gstringer@quonticbank.com	Enabled	3	View	Delete
Broker	Trainer2	One Rockefeller ...		Pcornette@quonticbank.com	Disabled	3	View	Delete

For questions and technical support, please reach out to [Tposupport@quonticbank.com](mailto:Tposupport@quonticbank.com)