

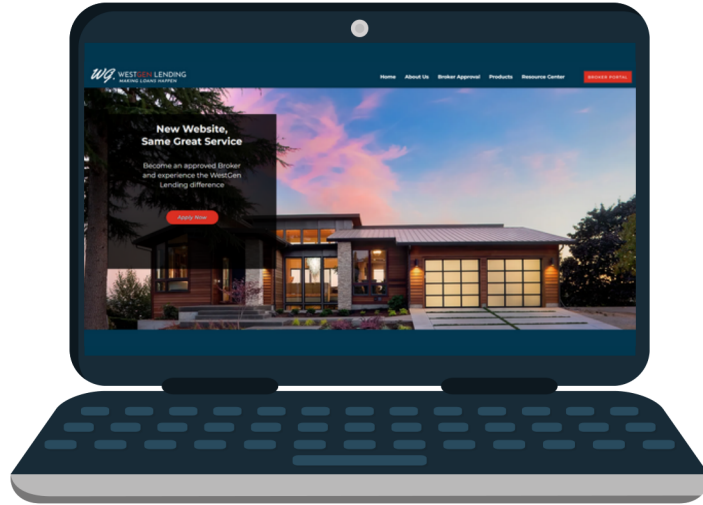
WG. WESTGEN LENDING
USER GUIDE

Adding Contacts
Through TPO

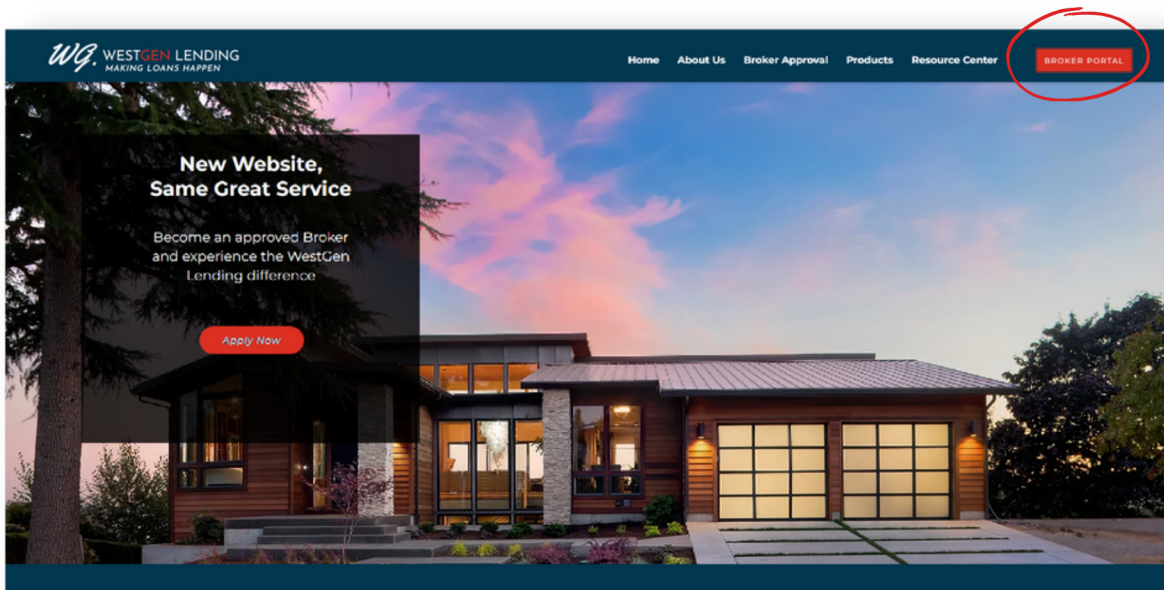
Last Updated 10/26/2023

Adding Contacts Through TPO

- 1 Visit [WestGenLending.com](https://www.WestGenLending.com)



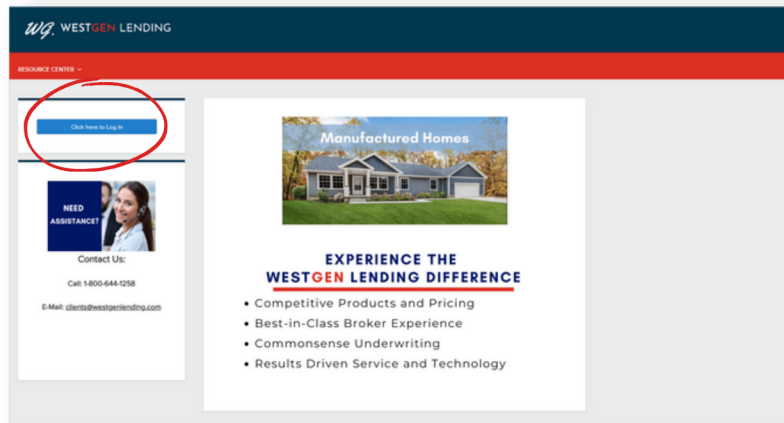
- 2 Click on the "[Broker Portal](#)" button on the top right side of the page



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



4

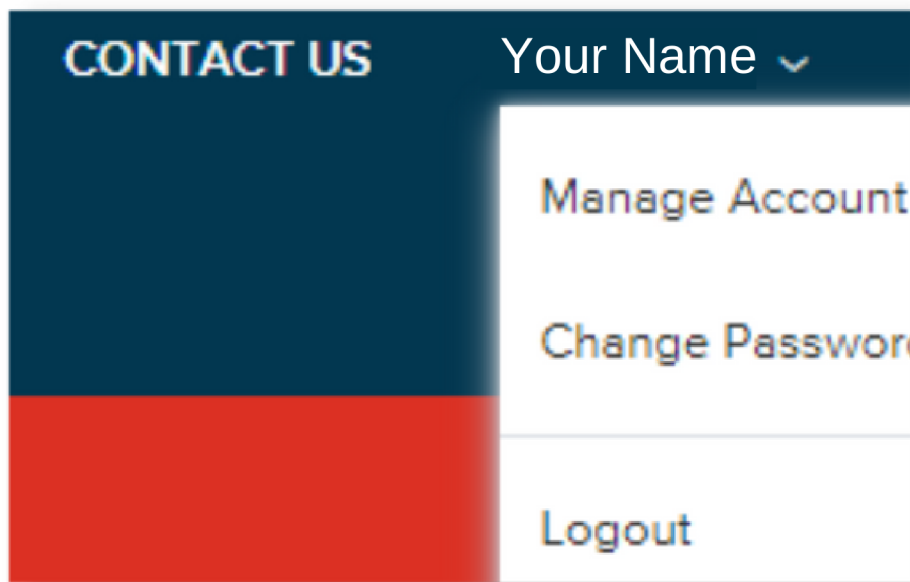
Enter your credentials and click "Login"

A screenshot of the WestGen Lending login form. The form is titled 'LOGIN' and has a close button (X) in the top right corner. It contains two input fields: 'User Name' and 'Password'. Below the password field is a checkbox labeled 'Remember Me'. At the bottom of the form is a blue 'Login' button. Below the form is a link that says 'Forgot Password?'.

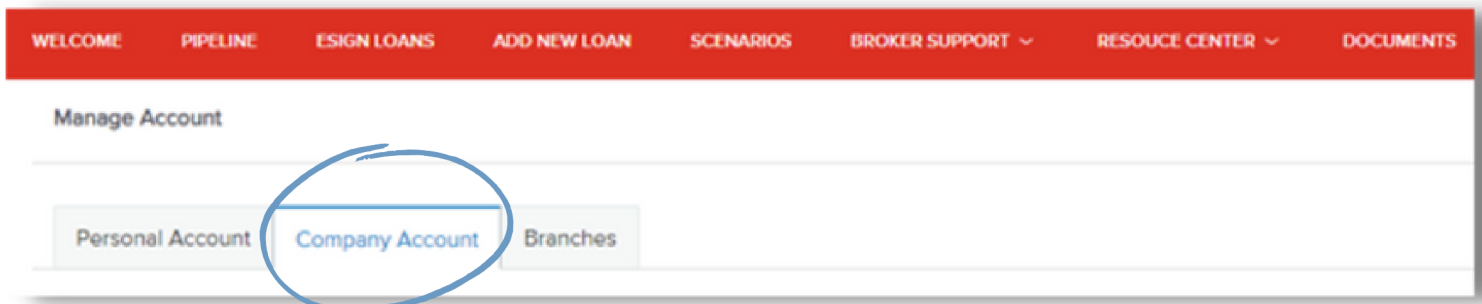
★ If you have forgotten your password, please click the "Forgot Password?" link and follow the prompts to reset it

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



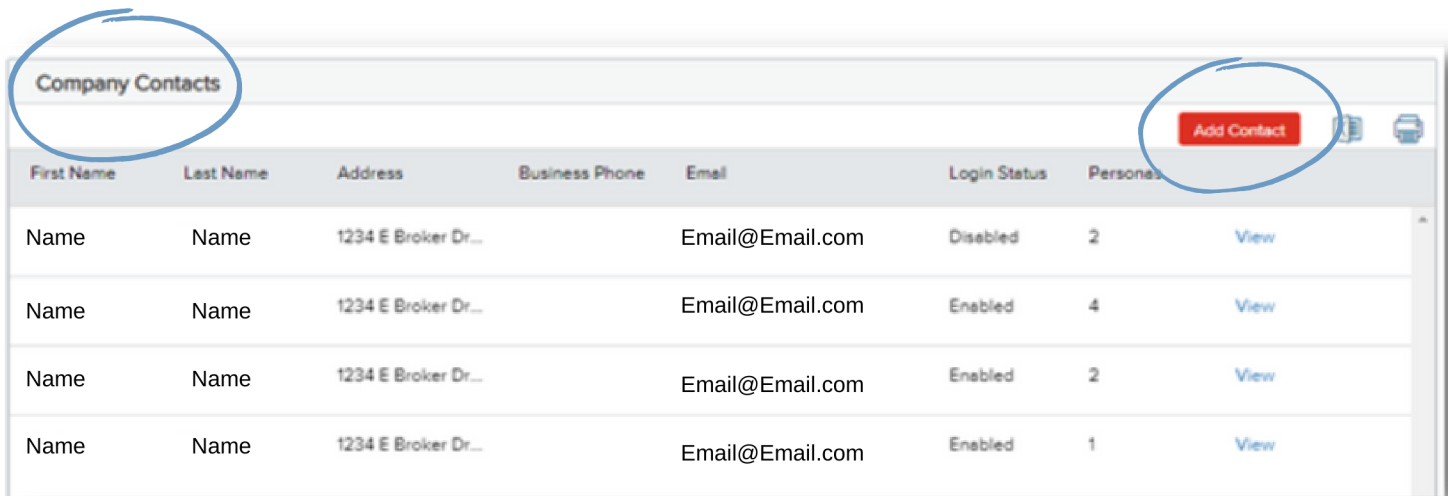
- 6 Click on the “Company Account” tab



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



The screenshot shows a web application interface with a table titled "Company Contacts". The table has columns for First Name, Last Name, Address, Business Phone, Email, Login Status, and Personal. There are four rows of data. A red "Add Contact" button is located in the top right corner of the table area, and the "Company Contacts" header is also circled in red.

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

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

Create New Contact

* Email Address

* First Name

Middle Name

* Last Name

Login Status **Enabled**

* Login Email Address

NMLS ID

Social Security #

* Organization **Choose**

Use Company Address

Address

City

* State

Zip -

Business Phone Ext.

Business Fax Ext.

Cell Phone

* Personas **Add Persona**

View access to team's loans

Edit team's loans

Assigned AE

Record Last Updated 10/26/23 10:04:29

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9 Your contact has been added! Please call your Account Executive or 800-644-1258 for additional assistance



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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