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Profile, System Access & Service Updating on Dealify

TPO Users have the ability to edit their profile information which includes personal information, login settings, system access and service credentials.

A. Editing Personal Information

To edit your personal information, please follow these instructions:

1. On the TPO Pipeline, menu on the left hand side, click "My Profile".

2. Select and edit any and all personal information needed which can include emails and task notifications, name, phone numbers, etc.

| hboard | | | | | | |
|------------------------------------|-----------------|-----------------------------|----------------|--------------------------|---|--|
| ker Pipelines | > | Personal Information | Login Settings | System Access S | Service Credentials | |
| ckPricer | > | * Indicates required fields | | | | |
| ate New Loan | > | Personal Information | | | | |
| Profile | | | | | | |
| nage Portal | > | Name First Name * | Middle Name | Last Name * | Suffix | |
| enario & Bank Statemer emission | ¹⁴ > | Ashley Contact Information | | Heesch | | |
| | | Contact Information | | | | |
| | S | Phone * | Fax | Cell * | | |
| | | (617) 997-1405 | | (617) 997-1405 | Private: For multi-factor authentication only | |
| | | Pager | | | | |
| | | Email * | | | | |
| | | | | Send task-related e-mail | | |

B. Editing Login Settings

Select the "Login Settings" tab on the top menu under "My Profile"

Change Security Information & Password

| Portal: Broker | Ŧ | | | | | | | | |
|---|---|---|----------------------------|--------------------------|---------------------------|-----------------|--|--|--|
| Poneli Broker | v | My Profile | | | | SAVE | | | |
| Dashboard | | | | | | | | | |
| Broker Pipelines | > | Personal Information | Login Settings | System Access | Service Credentials | | | | |
| QuickPricer | > | Security Information | | | | | | | |
| Create New Loan | > | Question 1 | | | Answer 1 | | | | |
| My Profile | | What was the name of you | ur first pet? | | change answer | | | | |
| Manage Portal | > | Question 2 | | | Answer 2 | | | | |
| Scenario & Bank Statement Submission | > | What is your maternal gra Question 3 | ndmother's maiden name? | - | change answer Answer 3 | | | | |
| | | What was the title of the s | ong you had your first dan | ce to at your wedding? - | change answer | | | | |
| | < | Change Password | | | | | | | |
| | | Login Name | Old Password | New Password | | Retype Password | | | |
| | | ashleybroker 🔤 | | 3 | GENERATE | | | | |
| | | | | | | | | | |

C. Register New Authenticator

Select the "System Acccess" tab on the top menu under "My Profile"

- Scroll to the bottom on the page and click "register new authenticator" where you will be prompted to register the authenticator app and scan a QR code. The authenticator app will be the primary source of one time passwords. You may still request one manually if your authenticator app is not available.
- 2. Select "configure authenticator" on the bottom right.

| Portal: Broker | • My Profile | SAVE |
|---|------------------------------------|---|
| Dashboard | | Register Authenticator App |
| Broker Pipelines | > Persona | |
| QuickPricer | > Client Cert | The authenticator app will be the primary source of one time passwords. You may still request one manually if your authenticator app is not available. |
| Create New Loan | > | Step 1 Scan the following barcode with your favorite authenticator application. |
| My Profile | Device N | |
| Manage Portal | > IP Access | |
| Scenario & Bank Statement Submission | > IP Addre 73.234.6 107.127. | · · · · · · · · · · · · · · · · · · · |
| | 207.38.1 | You may also enter the following code manually: PIZTGNZWNVZUGOCQ |
| | Authentica register n | Step 2 Enter the current token code from your app to validate the setup. |
| | | CLOSE CONFIGURE AUTHENTICATOR |

D. Add New Service Credentials

Select the "Service Credentials" tab on the top menu under "My Profile"

- 1. Click the blue button "ADD CREDENTIAL"
- 2. A pop-up window will appear where you will be prompted to do the following:
 - i. Select services in the service credential editor, add a login and add a password
- 3. Select "SAVE" on the bottom right.
- 4. Exit pop-up and remember to select "SAVE" on the upper right hand corner of your window to save final changes. This button is in BLUE.

| Portal: Broker | * | My Profile | | | | | | | SAVE |
|---|---|--------------------|----------------------------------|--------------|-----------|-----------------|------|--|------|
| Dashboard | | | | | | | | | |
| Broker Pipelines | | Personal Inform | nation Login Set | tings Syste | em Access | | | | |
| QuickPricer | | Service Crestontie | le | | | | | | |
| Create New Loan | | | ervice Credentia | Editor | | | × | | |
| My Profile | | Service | vices 🦳 Fannie Mae | DO/DU Credit | | | | | |
| Manage Portal | | ADD CF | ☐ Tax Transcri ☐ Soft Pull Cr | ipts | | | | | |
| Scenario & Bank Statement Submission | | | AUS Submi | | | | | | |
| | | Log | jin 😒 | Password 😣 | Con | firm Password 😣 | | | |
| | | | | | | | | | |
| | | | | | | CANCEL | SAVE | | |
| | | | | | | | | | |
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