



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.

Portal: Broker

Dashboard

Broker Pipelines

QuickPricer

Create New Loan

My Profile

Manage Portal

Scenario & Bank Statement Submission

My Profile

SAVE

Personal Information

Login Settings

System Access

Service Credentials

* Indicates required fields

Personal Information

Name

First Name * Ashley

Middle Name

Last Name * Heesch

Suffix

Contact Information

Phone * (617) 997-1405

Fax

Cell * (617) 997-1405

☐ Private: For multi-factor authentication only

Pager

Email * aheesch@defycapgroup.com

☒ 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

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Personal Information

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Security Information

Question 1

What was the name of your first pet?

Answer 1

change answer

Question 2

What is your maternal grandmother's maiden name?

Answer 2

change answer

Question 3

What was the title of the song you had your first dance to at your wedding?

Answer 3

change answer

Change Password

Login Name ashleybroker

Old Password

New Password

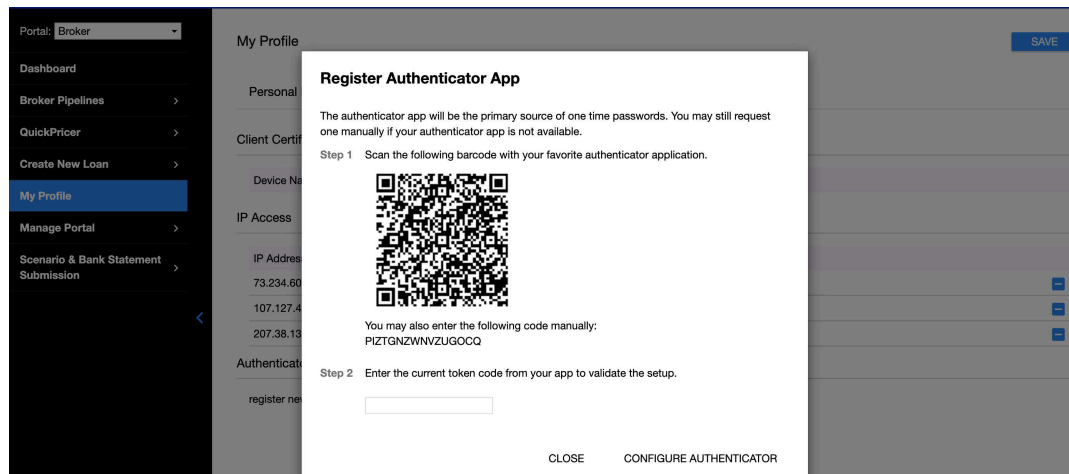
GENERATE

Retype Password

C. Register New Authenticator

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

1. 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.



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.

