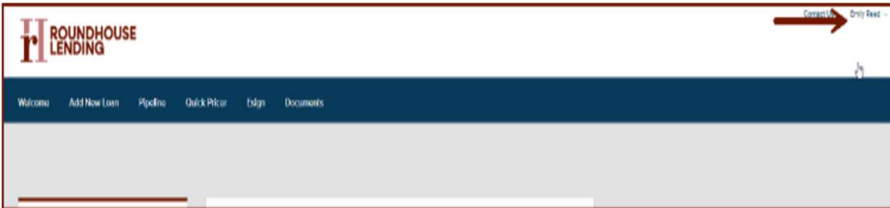
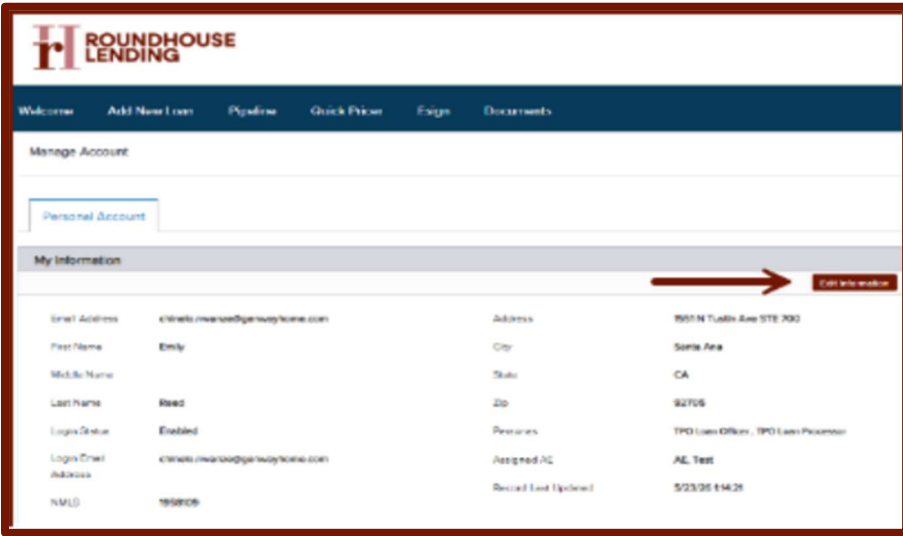
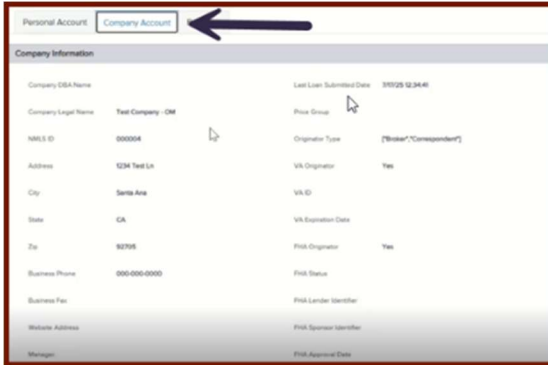
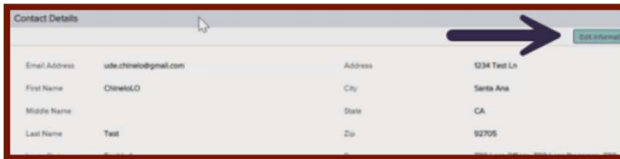
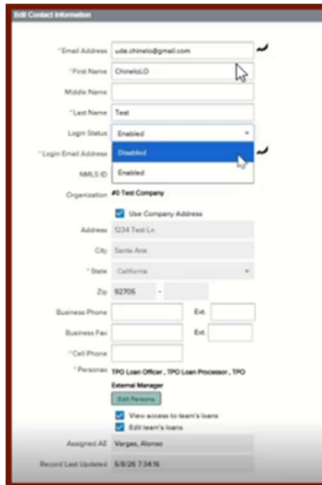
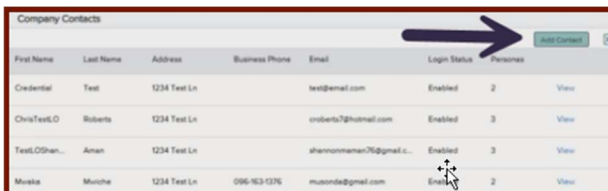


**Purpose:** This job aid explains how to manage company contacts in Arena Portal. It covers updating user information, maintaining accounts, and adding or disabling users using the Manage account feature.

| DESCRIPTION                                             | STEP / ACTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ACCESSING<br/>THE MANAGE<br/>ACCOUNT<br/>FEATURE</b> | <ol style="list-style-type: none"> <li>1. Log into the Arena Portal</li> <li>2. In the top right corner of the screen, click on your name to open the dropdown menu</li> <li>3. Select <b>Manage Account</b> from the drop-down list</li> </ol>                                                                                                                                                                                                                                                                                                                      |
| <b>MANAGING<br/>YOUR PERSONAL<br/>ACCOUNT</b>           | <p>Upon clicking <b>Manage Account</b>, you will land on the Personal Account tab by default. This is where you can view your system information, including your email, NMLS ID, phone numbers, and assigned personas.</p> <ol style="list-style-type: none"> <li>1. To update your information, click the <b>Edit Information</b> button</li> </ol>  <p>You can modify fields that are not grayed out (e.g., email address, phone number, NMLS ID)</p> <p><b>Important:</b> Do not change your name to a nickname unless it matches your NMLS record exactly.</p> |

| DESCRIPTION                         | STEP / ACTION                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ACCESSING COMPANY CONTACTS          | <ol style="list-style-type: none"> <li>Click on the <b>Company Account</b> tab located next to the Personal Account tab. <ul style="list-style-type: none"> <li>This page displays your company's information, including DBA Name, NMLS ID, and assigned Account Executive.</li> </ul> </li> </ol>                                                               |
|                                     |  <ol style="list-style-type: none"> <li>Scroll down to the <b>Company Contacts</b> section to view a list of all users associated with your company.</li> </ol>                                                                                                                |
| EDITING OR DISABLING EXISTING USERS | <ol style="list-style-type: none"> <li>In the <b>Company Contacts</b> list, locate the user you wish to modify.</li> <li>Click the <b>View</b> link in the far-right column for that user.</li> <li>On the Contact Details page, click the <b>Edit Information</b> button.</li> </ol>                                                                            |
|                                     |  <ol style="list-style-type: none"> <li>To Disable a User: If a user is no longer with the company, change the Login Status dropdown from <b>Enabled</b> to <b>Disabled</b>.</li> </ol>  |

|                                    | <p>5. To <b>Update Information</b>: Modify their contact details as needed.</p> <p>6. Click <b>Save</b> to apply the changes.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DESCRIPTION                        | STEP / ACTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <p><b>ADDING A NEW CONTACT</b></p> | <p>1. Return to the <b>Company Contacts</b> section under the Company Account tab.</p> <p>2. Click the green <b>Add Contact</b> button located at the top right of the contact table.</p>  <p>3. The <b>Create New Contact</b> form will appear.</p> <p>4. Fill in the required fields, including:</p> <ul style="list-style-type: none"> <li>Email Address</li> <li>First Name and Last Name</li> <li>Login Email Address</li> <li>Cell Phone</li> </ul> <p>5. Ensure Use <b>Company Address</b> checkbox is checked. Do not input a different address, as this may negatively affect disclosures and printed documents</p> <p>6. Click <b>Add Persona</b> to assign the appropriate role(s) to the new user (e.g., Loan Officer, Loan Processor).</p>  |
|                                    | <p>7. Click <b>Save</b> on the bottom right to create the new contact.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |