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#### **NEW USER - REGISTERING FOR ACCESS:**







 Scroll down to complete the Partner Portal New User Request section – fill out and select Submit

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	Your Branch Stréet address*			
	Your Branch City*	Your Branch State/Region*		
	First Name"	Last Name*		
	Phone number*	Email		
	Your NMLS #**	Your Quorum Account Executive		
	Quarum needs the contact information you pr	owde to us to contect you about ou products and services. You may ansutiscribe from these communications at any time. For		
	information on how to unsubscribe and our pl	rvacy practices, please review our <u>Brivacy Policy</u>		

3) Within 1 business day you will receive an email with user credentials – example below:

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#### EXISTING USER - LOGGING INTO THE PARTNER PORTAL:

1) Visit partners.quorumfcu.org & select PARTNER PORTAL LOG IN (upper right corner)





#### 2) Enter User Name and Password, then select Login

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#### **PARTNER PORTAL - OVERVIEW**

1) Once logging in, you will be brought to the home page below.



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.COME PIPELINE ADD NEW LOAN HOME ↔		
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		Kevîn Kyrillîdis
		Tyson Blackburn
		Vincent Buonglovanni
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2) Select Welcome from the top menu to return to the above page, at any time when in the Partner Portal

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#### 3) Select Pipeline from the top menu to view the loans in your Pipeline

4) Select Add New Loan from the top menu to start a new submission (See *Starting a New Submission* section for a step-by-step overview of completing a new loan submission)

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5) Select Home from the top menu to visit our main website partners.quorumfcu.org

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		Tyson Blackburn
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6) You will find your Account Executive's contact information (phone number & email address) under Lender Key Contacts

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Tistrant Tistage 2000 Westchester Avenue, Purchase, NY K677 77Herg Providy Soc		•



Back to Main Menu

7) To Log Out, select your name in the upper right corner, then select Logout

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#### STARTING A NEW LOAN SUBMISSION

1) To start a new submission, select Add New Loan

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2) Select User Name under Loan Officer and Loan Processor, and select Next

3) Select Click to Browse to upload the FNM 3.2 file or MISMO 3.4 file from your local drive, then select Next

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#### 4) You will be brought to the below page

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5) Follow the instructions at the top of the page in red. This includes updating the Loan Amount to the amount of the HELOC (since this defaulted to the value of the first mortgage from the 3.2 FMN file). Please also change Concurrent First to Yes if the submission is for a Simultaneous Purchase or Refinance.

Select "Step 1 – Start Submission"

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6) If other required fields are blank, you will see the below alert. Fill in the fields accordingly, then select Update

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7) Once selecting "Step 1 – Start Submission", if you exit the application or close the website, you can go back into this application submission by selecting "Pipeline" from the top menu then double clicking the application

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8) But you are not done yet! Your application will not be fully submitted for review until you upload the required documents and select "Step 2 – Complete Submission". You will receive the below email as a reminder:

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know the content is s Dear Partner,	afe.									
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You will receive an ad	Iditional confirmation	email once complet	ting the	above steps.						
Please reach out to ye	our Account Executiv	e, Angela Prospero, i	f you h	ave any questi	ons.					
Thank you!										
Quorum Mortgage Te	am									



9) In the application, select Documents from the left-hand menu, then next to **Submission** – **Required Documents**, select "Browse for files", then select your files from your local drive

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11) Select "Step 2 – Complete Submission" from the left-hand menu. Pop-up box will open at the top center, select Continue

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QUORUM BANKING THAT'S GOOD, FOR YOU.		Are you sure you want to submit this loan at this time?			CONTACT US	S ÉUIA	e Mecini	a ÷
WELCOME PIPELINE ADD NEW LOAN HOI	DME ~	Canool Continue						
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12) You will see the below message once successfully submitted

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Neil		Lo. To	en ≢: 2102( tel Loen Am \$50,000.00	Loan Type: HELOC Loan Purpose: Purchase	Interest Rete: 6.500% Loan To Value 7.27% / 29,06%	Sterted Wh	2nd	â.	2	
E LOAN SUMMARY		0	Your loan was submitted	Successfully.					-	
1005     DOCUMENTS LOAN ACTIONS Import Additional Data Step 2 - Complete Submissi.	Submit Loan Please complete the following steps to ensure your // I Revew and equal the following fields: a Base Loan Amount/NELOC Total Credit Linit - change b. Concurrent Plint - select Yes if smultaneous purchase C. Click '980-1 Smith Submission' Click Documents on the lefthand side Click Total Credit Submission' S. Click '1980-1 Submission'	submission is successfully completed to HELOC line amount being requested or refeators & enter New Concurrent Pars t or Browse for Files.	Joan amount	lş						
	Submission Overview Application Date 02/10/2021	Submission Status Submitted	Initial Su 02/10/20	bmittal Date 921	Last Submittal Date 02/10/2021					
	Borrower Information Select Borrower Peir	*								+





13) You will receive the below email as confirmation as well:

14) Select Welcome from the upper menu to go back to your homepage

	₽ <b>₽</b>	CONTACT US Effe Mach
COME PIPELINE ADD NEW LOAN HOME ~		
cently Accessed Loans	Company Announcements	Lender Key Contacts
208360 so, Neil Angelo Garcia 000.00, HELOC, Detsched	Welcome to Quorum's Partner Portal 12/28/2020 04:42 PM	Angela Prospero Primary 914-61-3766 Angela Prospero@quorumfculorg
		Kevin Kyrilidis 944.441.3002 Kevin Kyrilidis@quarumfau.org
		Tysion Blackburn 914-041-0753 Tysion Blackburn Bquorumfqu.org
		Vincent Bionglovanni 616-503-1488 Vincent Bionglovanniëquorumiculorg
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# Q

# **QUORUM PARTNER PORTAL**

#### CHECK THE STATUS OF AN EXISTING SUBMISSION

1) Once logging into the Partner Portal, select Pipeline from the top menu



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VELCOME PIPELINE	ADD NEW LOAN	ном	elea.								
							Ein	d Loan d	~ 9	Advanced Fitter	61
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			01/25/2021	210105	(animation)	25,000.00	0014-000	-	AL	RealtyLine Interest Only	Simul Ref
k,			01/25/2021	21010 8	Sectors).	162,750.DO	100.000	1200	CA	RealtyLine Interest Only	Simul Pun
	P	M	01/22/2021	21010*	designed and	27,598.00			WA	RealtyLine Interest Only	Stend Alc
	Jan 1		0140.0005	-210427	1000		Contraction of		Loc .	Internet Onla	0)m./ 0
										* 30 perpage	0 2 ×

2) Search your Pipeline by selecting the column title to sort by that column or entering the loan number in the Find Loan search box

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<ul> <li>All loans</li> <li>My Loans</li> </ul>			01/26/2021	21010	law party	25,000.00	0010-1110		AL	ResityLine Interest Only	Simul Ref
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										* 30 perpage	<b>0</b> 2 ×

Last Updated: 3/1/2021 PAGE 15 OF 22



3) Double-click on the desired loan submission

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LOAN OPTIONS	<u>P</u>	P	Application Date ∽	Loan #	Borrower Name	Loan Amt	Subject Property Address	Subject Property City	Subject Property State	Loan Program	HELOC Purp
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#### 4) View updates within the submission

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WELCOME PIPELINE ADD NEW LO	DAN HOME ~		
Alexander =		Loan #: 210 Loan Type: HELOC Totel Loan Am \$249,999.00 Loan Purpose; Cash-Out Refina	Interest Rate: 5.000% Loan To Value 24.31% / 77.63% Cond Approval Wit 2nd
E LOAN SUMMARY	-		
	\$249,999.00 24.31% / 77.63% / 77.63%	Cond Approval 02/03/2021	Key Dates Application Disclosure Registered 01/28/2021
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Step 2 - Complete Submissi_	221/Viscola Rol, Hanalaman, FW 89002	P 8 ( \$2,274.65 Reserve: 011 \$129,176.66 28.183%/07.279%	Revised CD Sent - AUS Ordered - Submit to UW -
λ.	Primary 1 unit Detached Estimated Value \$1,028,296	Decision FICO 786	Estimated Closing 2010(2221 UW Suspended - UW Approval 02/02/2021
		Borrower Experien/TransUnion/Equifex Alexander 786 771 790	UW Clear to Close - Funds Released -





#### 5) Select Pipeline from the top menu to return to your Pipeline

#### UPLOAD ADDITIONAL DOCUMENTS TO AN EXISTING SUBMISSION

 Once logging into the Partner Portal, selecting Pipeline, and double-clicking on the desired loan - select Documents from the left-hand menu, then next to Submission – Required Documents, select "Browse for files", then select your files from your local drive



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E LOAN SUMMARY	Please upload <u>all documents</u> to Submission - Required Documents folder.	9								
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and a - compress submission	Nell Angelo Coloso									
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Partner Page 2500 Westchester Aven	Privelay Fiolog Statement									

Last Updated: 3/1/2021

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#### 2) Once the upload is complete you will see the below

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E LOAN SUMMARY	Please upload all documents to Submission - Required Documents fo	lder,						
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Parmer Birgs 2500 Westchester Avenue, P	Privacy Folicy Statement							

#### UNABLE TO LOGIN TO PARTNER PORTAL - FORGOT PASSWORD



1) Visit partners.quorumfcu.org & select Partner Portal (upper right corner)





#### 2) Select Log In



#### 3) Select Click here to Log In

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#### 4) Select Forgot Password

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HOME ~		
	LOGIN ×	
	eleanor.macina@quorumfcu.org	
	C Remember Me	
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#### 5) Enter user name (email address) and select Submit

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#### 6) You will see the following message on-screen



7) You will receive the below email – select the link in the email

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(i) If there are problems with how this message is displayed, click here to view it in a web browser. CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.										
Click here to access y If you experience pro URL: https://link.zixcentra 2F%23%2Fcontent%2 ***DO NOT REPLY TO	Click here to access your account and complete the steps to reset your password. If you experience problems opening the link, copy and paste the URL below into your Web browser. URL: https://link.zixcentral.com/u/ba911f89/ypBHn_Zs6xGCXhBSMy1kxg?u=https%3A%2F%2F5443858935.encompasstpoconnect.com% 2F%23%2Fcontent%2Fresetpassword%3Frcode%3DOUzMcbMZhiyoKjSvMxaEgS1OrBTmpj1lZgFlfqKzVRM%3D ***DO NOT REPLY TO THIS E-MAIL. THIS MAILBOX IS NEITHER MONITORED NOR ANSWERED***									



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Home ~						
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#### 8) Enter user name and new password, then select Reset Password

