

Loan Selling Advisor Seller User Roles

Use this document to circle or mark the user roles you need and forward to your administrator for user role provisioning in Access Manager.

Loan Selling Advisor Seller User Roles		
User Role Name	Seller Job Function/Title	Loan Selling Advisor Tasks/Functions
<i>Which user role do I need to complete these actions?</i>	<i>Who might need the level of access associated with this user role?</i>	<i>What actions do I need to complete?</i>
Closer Shipper	Closer/Shipper/Mortgage Operations/Loan Delivery	<ul style="list-style-type: none"> Review Certification Issues Evaluate Loans/view/Clear Evaluation Edits Enter Settlement Details Create/View Certification Forms Manage Settlement Forms View Settlement Statements Search for loans/contracts Designate a Warehouse Lender Access Cash-Released XChange® User Guide, if applicable
Export Analyst	Export Contract or Loan Data, Reporting, Closer/Secondary Analyst	<ul style="list-style-type: none"> Export Data View Export Results Retrieve Historical Data
External Aggregator	Approved Aggregator for the Correspondent XChange	View and navigate the Aggregator pipeline.
External Guarantor Rate Sheet	Lock Desk/Acquisitions/Trader/Secondary Analyst	<ul style="list-style-type: none"> Generate a Guarantor Rate Sheet View/Export Guarantor and MultiLender pricing (Eligibilities, Business Arrangements Stipulations, Buy Up/Buydown Ratios & Credit Fees) <p>Note: This role is for the Guarantor/MultiLender Execution.</p>
External Guarantor SMO	Guarantor Secondary Marketing Officer/Lock Desk/Loan Acquisitions and Sales/Securities Lock Desk/Trader	<ul style="list-style-type: none"> Obtain a Guarantor or MultiLender Contract under an applicable Pricing Identifier View Import Guarantor Contract Results View Settlement statements Approve/reject proposed certification changes Search for Loans Search for Contracts



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External Security Wire Assigner Note: This role is for the Guarantor/MultiLender Execution.	Lock Desk/Acquisitions/Trader/Closer/Shipper/LoanDelivery/Operations	Select, Assign and Remove Security Wire Transfer instructions for Guarantor and Multilender Contracts
External Seller Setup Manager This role is for the Guarantor/MultiLender Execution. The person assigned to this role: <ul style="list-style-type: none"> • May not have the role of Setup Administrator • The name and signature of the of the employee assigned to this role must appear on the Form 988SF Certificate of Incumbency and board of directions resolution. See Guide Chapter 2403.11. 	Lock Desk/Acquisitions/Trader/Closer/Shipper/LoanDelivery/Operations	Approve/Reject Security Wire Instructions
External Setup Administrator Note: This role is for the Guarantor/MultiLender Execution. The person assigned to this role may not have the role of Setup Manager.	Set up Security Wire Instruction Information	<ul style="list-style-type: none"> • Create Security Wire Transfer instructions • Edit Security Wire Transfer instructions • Delete Security Wire Transfer instructions
Loan Manager	Loan Manager/Mortgage Operations/Loan Delivery	<ul style="list-style-type: none"> • Create or Modify Loans (Import or data entry) • Import from Loan Product Advisor • Modify Best Efforts Import (Cash) • Export Loans • View Import Results • Delete Loans • Search for Loans



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Pipeline	Lock Desk/Secondary Marketing Officer/Secondary Portfolio/Pipeline Management/Loan Acquisitions and Sale	<ul style="list-style-type: none"> • Search for Contracts • Search for Loans • View Contract Pipeline • View Loan Pipeline • Change User Context • Retrieve Historical Data
Price Sheet Analyst	Lock Desk/Acquisitions/Trader	Create/View and export Freddie Mac Cash Rate Sheet
Secondary Analyst	Lock Desk/Acquisitions/Trader	<ul style="list-style-type: none"> • Pair Off/Extend Cash Contracts • Allocate/Add Loans to Contract • Deallocate/Remove Loans from Contract • Price Loan Against Contract • Search for Contracts • Request Cash Rate Sheet • Search for Loans
Settlement Statement Analyst	Loan Delivery/Operations/Servicing/Reconciliations/Acquisitions	<ul style="list-style-type: none"> • View Settlement Statements (Purchase Statement & Funding Details) • Retrieve Historical Data
SMO (Secondary Marketing Officer)	Cash Secondary Marketing Officer/Lock Desk/Loan Acquisitions and Sales/Traders	<ul style="list-style-type: none"> • Take Out Cash Contract • Loan Pipeline • Import Cash Contract • View the Exclusionary List • Search for Contracts • Change User context • Retrieve Historical Data

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