

Universal Credit Services

How To Setup New Users

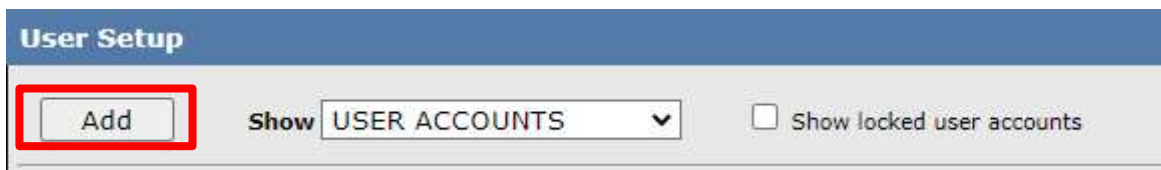
Did Your Know You Can Set-up and Add New Users Yourself?

New User Setup – Admin Access Only

1. Click on **User Setup** under the Tools box located in the middle of the main screen.



2. Click **Add** on the upper right-hand side.



3. Fill in the user's name, desired login, email address and cell phone #, the cell phone # is needed for Auth codes to be instantly texted to a user.

Choose to set a temporary password or have one emailed to the user, the user will need an auth code should you choose the automatic password setup and you will not be provided with what the user's temp password is.

Access Permissions – Set all permissions according to the rights the user needs (See examples below).

If the user will be paying for their own charges, select Require Credit Card Payment under Billing Information.

4. Click Save

5. After the user is setup you will be redirected back to the user list screen, click on the user's name and then the **Restrictions** tab located to the top left, review all access rights and block or unblock any services as needed.

Please note TRV access is disabled by default and must be enabled here by unchecking the box next to TRV and clicking save if the user needs access please also email trvtoday@universalcredit.com to enable the user for ordering on the back end.








The following are ONLY EXAMPLES. Please review each user's setup for what is needed.


Example: Typical Processor Setup

PROFILE

Department

Full Name  Phone Fax


Login  Email  Cell Phone (For auth code)  

Pointservices User ID 

SET PASSWORD AUTOMATICALLY SET PASSWORD MANUALLY


An email will be sent to the user with a link to let them choose their password.
If the user is given access to credit reports ordered by other users, please remember to enter the user's cell phone above or provide the user with an authentication code.

User Preferences

Automatically print report on new order? 

Access Permission


Is this user an administrator?
 Can view ordered products belonging to other users?
 Can view billing invoice of all users?
 Can view transaction charges?





Report Ordering Supplement Ordering Rescore Ordering Allow Re-Order After 
 Order For All Order For All Order For All 30 days


Example: Typical Loan Officer Setup

PROFILE

Department

Full Name  **Phone** **Fax**

Login  **Email**  **Cell Phone (For auth code)**  


Pointservices User ID 

SET PASSWORD AUTOMATICALLY **SET PASSWORD MANUALLY**

An email will be sent to the user with a link to let them choose their password.


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User Preferences

Automatically print report on new order? 

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Is this user an administrator?
 Can view ordered products belonging to other users?
 Can view billing invoice of all users?
 Can view transaction charges?

Report Ordering **Supplement Ordering** **Rescore Ordering** **Allow Re-Order After** 

Thank You

We are always here to help!

Visit our Help Center at
UniversalCredit.com/Help-Center





New User Setup

Company Name: _____

User Cell Phone#: _____

Name of New User: _____

New User Email: _____

Is the User an Admin? Yes No

Payment Method: Bill to Company (invoice) Credit Card Payment Per Order

USER ACCESS | This determines whether this person has the ability to order for:

ALL (can order for all users within company) SELF (files for only this user) NONE (does not have permission to order)

File Ordering: ALL SELF NONE Rescore Ordering: ALL SELF NONE

Supplement Ordering: ALL SELF NONE

Can Re-Order Files within: 1 Day 15 Days 30 Days 60 Days 90 Days 120 Days

View products ordered by others? Yes No View billing invoices of others? Yes No

RESTRICTIONS | Please check the box on the left if you would like to apply this restriction.

Disable Web-Access to system (access credit related products only through loan portal)

Disable Flood Report ordering

Disable Fannie Mae access to report ordering / reissuing

Disable CreditXpert products (such as; Wayfinder, What-If Simulator)

Disable Lien & Judgement Report ordering

Disable Tax Return Verification ordering / viewing.

Disable Business Credit Report ordering

Disable ordering Credit Reports from the website. Refresh allowed.

Disable Verification of Employment ordering

Disable Verification of Deposit ordering

Disable Undisclosed Debt Notification (UDN) ordering

Note: If you need multiple users set-up, all with the same exact rights and restrictions as above list names and emails below:

Name: _____

Email: _____

Name: _____

Email: _____

Name: _____

Email: _____