

Selling System Cash User Roles

What is a User Role?

User roles determine a designated user's authority within an organization to access various screens and perform selected functions within the application.

The system provides two levels of access for Cash user roles, full access and delivery access.

- Full access includes all user roles.
- Delivery access includes all user roles except, Secondary Marketing Officer.

If you have associates in your office who need access to specific user roles outside the system defaults, review the user roles in the table below to determine how narrow or broad you want a particular user's access to be. User roles may be combined to provide a user with access to multiple functions.

Consider the following points when completing the Form 900, *Selling System Authorized User Identification and Certification Form* to request an assignment of new user roles other than full access or delivery access:

- You should assign back-up user roles in the event a user is not available.
- Combine user roles to provide access to all the functions a user may need.
- Don't make assignments or assumptions based only on the "title" of a role.

Once you receive your user ID and password, test them immediately to ensure that you have the appropriate access. You must submit a new Form 900 in order to add, delete, or modify user roles.

Purpose

Use the table below to determine what tasks each user role can accomplish for Cash executions in the selling system.

If you need to...	One of your user roles must include...
Take out Cash Contract Search for Contracts Search for Loans	Cash Secondary Marketing Officer (SMO)
View Contract Pipeline View Loan Pipeline	Pipeline
Request FM Price Sheets Add Loans to Contracts Remove Loans from Contracts Price Loan Against Contract Pair-Off Contracts Manage Templates Search for Contracts	Secondary Analyst

If you need to...	One of your user roles must include...
Create New Loans Import Loans Import from LP Customize Import Formats Modify Loans Delete Loans View Loan Pipeline Search for Loans	Loan Manager
Review Certification Issues View Evaluation Issues Clear Loan Edits/Evaluate Loans Enter Settlement Details Create/View Certification Forms View Settlement Statements Search for Loans Search for Contracts Transfer Servicing Instructions Designate a Warehouse Lender	Closer/Shipper
View Freddie Mac's Exclusionary List	Exclusionary List

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