

# Add New Users in SPARC 2.0

## Correspondent Job Aid | SPARC



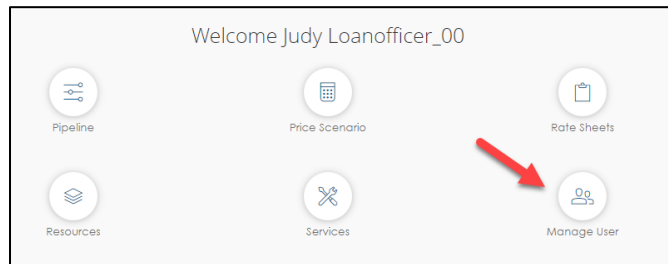
© Arc Home, LLC | April 2024 | All rights reserved.

**Objective:** This cheat sheet was designed to assist you in adding new users to SPARC 2.0. Please note that Arc Home will create profiles for the Correspondent Owner and an original set of Portal Admin users. ONLY Arc Home can add additional Portal Admin users, but multiple Portal Admin are permitted. Global Users can also only be added by Arc Home. (A Global User is a user who has a single sign-on with access to multiple branches or companies, such as a Third-party Processor.)

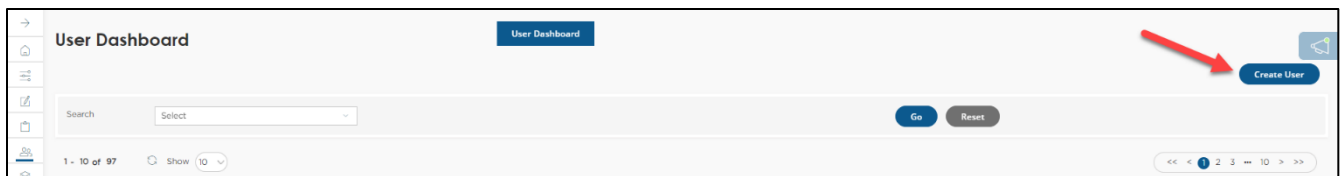
**Process:** Login to SPARC 2.0: <https://sparc.archome.com/>

**Step 1:** You must be a Portal Admin/Supervisor to add or edit existing users in SPARC

**Step 2:** Select **"Manage User"** from the Home Page



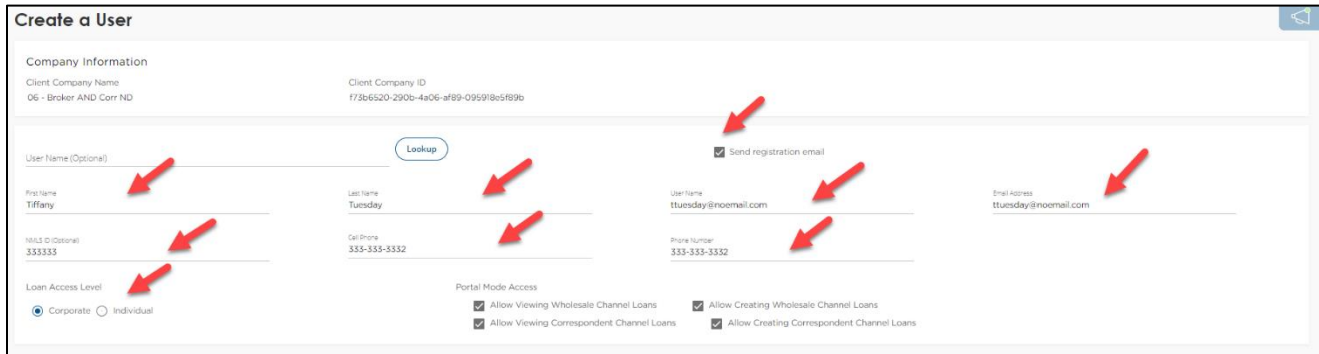
**Step 3:** Click the **"Create User"** button and complete the following fields



**Note:** Leave box checked "Send registration email", this will send an email to user advising of their username and how to setup password.

1. Enter user's First Name.
2. Enter user's Last Name.
3. Enter user's User Name.
4. Enter user's Email Address.
5. NMLS ID (Optional) – Please be sure to enter an NMLS for all licensed loan officers.
6. Enter user's Cell Phone.
7. Enter user's Phone Number.

8. Click **“Loan Access Level”** – This will determine the user’s access to the pipeline.
  - a. Corporate – within company – If assigned, the user will be able to see all loans in the pipeline regardless of assignment. This access is suggested for processors who may be working with multiple loan officers and/or post closers.
  - b. Individual – only if assigned. If assigned, the user will only be able to see the loans assigned or created in his/her name.

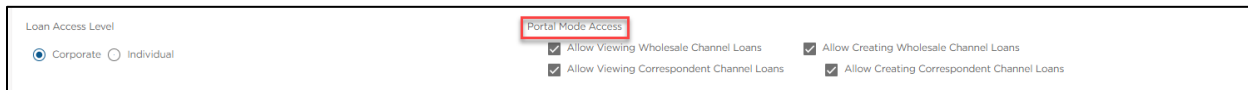


The screenshot shows the 'Create a User' form with the following fields and values:

- Company Information:** Client Company Name: 06 - Broker AND Corr ND; Client Company ID: f73b6520-290b-4a06-af89-095918e5f89b
- User Name (Optional):** First Name: Tiffany; Last Name: Tuesday; User Name: ttuesday@noemail.com; Email Address: ttuesday@noemail.com
- Phone:** Mobile: 333333; Cell: 333-333-3332; Home: 333-333-3332
- Loan Access Level:** Corporate (selected), Individual
- Portal Mode Access:**
  - Allow Viewing Wholesale Channel Loans
  - Allow Viewing Correspondent Channel Loans
  - Allow Creating Wholesale Channel Loans
  - Allow Creating Correspondent Channel Loans

9. Add **Portal Mode Access** by checking the applicable boxes
  - i. This determines the user’s ability to create and/or view loans within the Correspondent channel
    1. Allow Viewing Correspondent Channel Loans – This allows the user to view loans they have access to within their pipeline.
    2. Allow Creating Correspondent Channel Loans – This allows the user to upload a 3.4 file to create a loan within the system.

**Note: If your company is dual approved for Wholesale and Correspondent, the Wholesale Portal Mode Access will be prefilled.**



This close-up shows the 'Portal Mode Access' section with the following checked options:

- Allow Viewing Wholesale Channel Loans
- Allow Viewing Correspondent Channel Loans
- Allow Creating Wholesale Channel Loans
- Allow Creating Correspondent Channel Loans

10. Choose User Roles
  - i. Click **“Add Role”** - This determines the user’s functions within SPARC. Assign all functions performed by the user (i.e., if performs both as a Processor and Post Closer, assign both functions). Any of these assigned roles will receive status notifications throughout the loan submission process.
    1. **Loan Officer:** Assign this for a Loan Officer user.
    2. **Processor:** Assign this if the user is processing the transaction and will be submitting to Arc Home Underwriting.
    3. **Secondary:** Assign if the user needs the ability to quick lock, view pricing, lock loans and use the Price Scenario.
    4. **Post Closer:** Assign this if the user will be submitting closed loan packages for purchase review to Arc Home AND to view the purchase advice.
    5. **Portal Admin:** Can only be assigned by Arc Home.

| Role                          | Company Name (ID)  | Assign Loan Officers                       | Licensed States | Action |
|-------------------------------|--|--|-----------------|--------|
| Select Role<br>Loan Processor | 06 - Broker AND Corr ND(73b6520-290b-4a06-af99-095978e5f8... (1) | Select LO<br>Andy Anderson, Amy N.(65) (1) | (0)             |        |
| Select Role<br>Secondary      | 06 - Broker AND Corr ND(73b6520-290b-4a06-af99-095978e5f8... (1) |  | (0)             |        |
| Select Role<br>Post Closer    | 06 - Broker AND Corr ND(73b6520-290b-4a06-af99-095978e5f8... (1) |  | (0)             |        |

**Add Role**

11. Manage Permission - Click **“Accept Default”**

12. Click **“Create User”**

Manage Permission

Please Accept Default or Edit Permission

**Accept Default** **Edit**

**Cancel** **Create User**

If you wish to Edit and/or Update and existing user, follow the below:

Select **“Search”** and enter criteria to search for an existing user. Click **“Edit”** (pencil icon) to make updates to an existing user.

**User Dashboard**

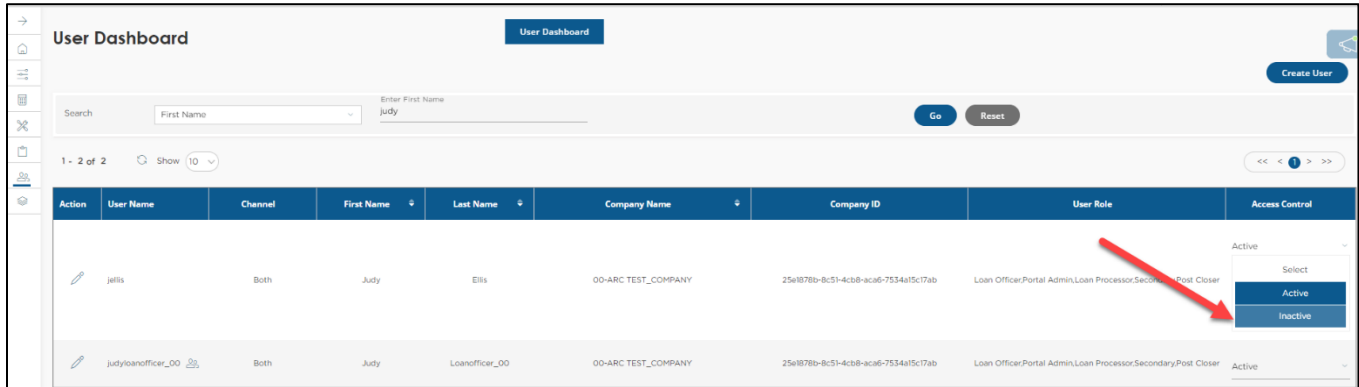
Search: Last Name  Enter Last Name  
Go Reset

1 - 1 of 1 Show 10

| Action | User Name   | Channel | First Name | Last Name | Company Name        | Company ID                           | User Role    | Access Control |
|--------|-------------|---------|------------|-----------|---------------------|--------------------------------------|--------------|----------------|
|        | brendabeach |         | Brenda     | Beach     | 00-ARC TEST_COMPANY | 25e1678b-6c51-4cbb-acc6-7534a15c77ab | Loan Officer | Active         |

**Important Note:** You can update a user's **"Access Control"** from the User Dashboard by Selecting **"Inactive"** if the user is no longer with your company

- Select Active or Inactive from the dropdown
- Confirm change



The screenshot shows the 'User Dashboard' interface. At the top, there is a search bar with 'First Name' selected and 'Judy' entered. Below the search bar, there are pagination controls showing '1 - 2 of 2' and a 'Show 10' dropdown. The main content is a table with the following columns: Action, User Name, Channel, First Name, Last Name, Company Name, Company ID, User Role, and Access Control. The first row of the table has a red arrow pointing to the 'Access Control' dropdown menu, which is currently set to 'Active' and has options for 'Active' and 'Inactive'.

| Action | User Name                          | Channel | First Name | Last Name      | Company Name        | Company ID                           | User Role  | Access Control |
|--------|------------------------------------|---------|------------|----------------|---------------------|--------------------------------------|--|----------------|
|        | jella                              | Both    | Judy       | Ellis          | 00-ARC_TEST_COMPANY | 25e1872b-8c51-4cb8-aca6-7534a15c17ab | Loan Officer,Portal Admin,Loan Processor,Secondary Post Closer | Active         |
|        | <a href="#">judyleanofficer_00</a> | Both    | Judy       | Loanofficer_00 | 00-ARC_TEST_COMPANY | 25e1872b-8c51-4cb8-aca6-7534a15c17ab | Loan Officer,Portal Admin,Loan Processor,Secondary Post Closer | Active         |

Are you sure you want to change the status to Inactive? ✕

Yes No

Note: This action will disable user in portal.


If you still require assistance, you can contact [SPARCASSIST@archome.com](mailto:SPARCASSIST@archome.com) or call 215-383-9220.

Access our SPARC portal or reset your SPARC password [here](#).

# Addendum A



## Adding Loan Officer Licenses

1. Click the "Licensed States"
2. Click "Add"
3. Add "State", "License Number" and "Expiration Date" (If there is no state license, type "None" as the License #.)
4. Click "Update"

| Role                        | Company Name (ID)   | Assign Loan Officers | Licensed States | Action  |
|-----------------------------|---|----------------------|-----------------|---|
| Select Role<br>Loan Officer | 00-ARC TEST_COMPANY(25e1878b-8c51-4cb8-aca6-7534a15c17ab) | (1)                  | 0               |  |

**Licensed States** ×

Licensed States:(1) Add

| State      | License Number | Expiration Date | Action  |
|------------|----------------|-----------------|---|
| New Jersey | 11111          | 03/31/2025      |   |

Update
Cancel

**NOTE: NMLS and state licensing is required for Loan Officers.**