

# Add New Users in SPARC 2.0

## Broker Cheat Sheet | SPARC



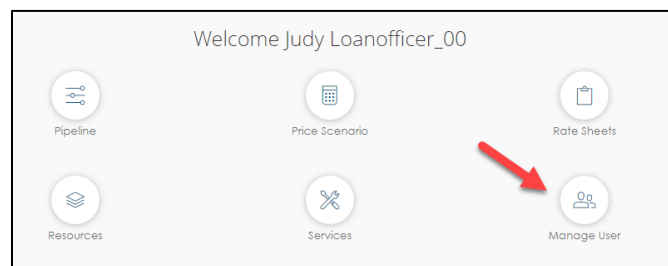
© Arc Home, LLC | April 2024 | All rights reserved.

**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 Broker Owner and an original set of Admin users. ONLY Arc Home can add additional Admin users (called "supervisors" in the system), but multiple admins/supervisors 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 an Admin/Supervisor to add or edit existing users in SPARC

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



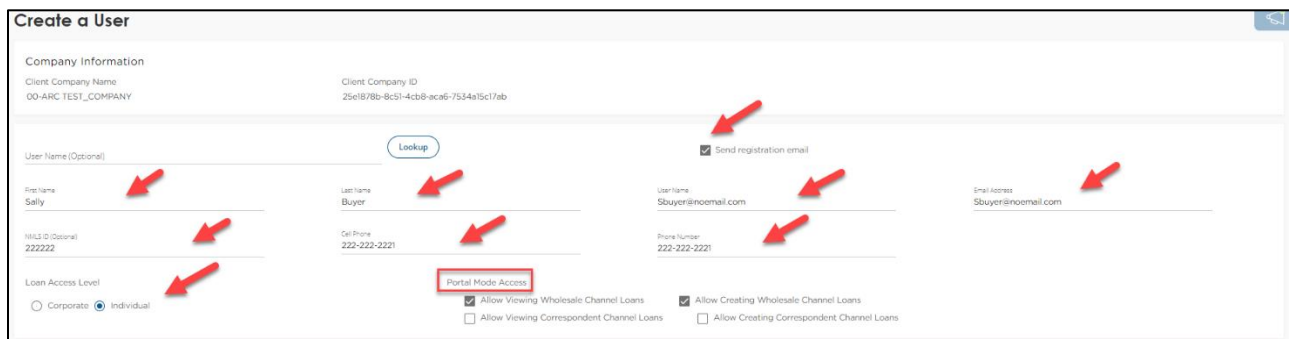
**Step 3:** Click the "**Create User**" button and complete the following fields



**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.
  - b. Individual – only if assigned. If assigned, the user will only be able to see the loans assigned or created in his/her name.
  
9. Confirm user’s **"Portal Mode Access"** – This determines the user’s ability to create and/or view loans within the Wholesale Channel
  - a. Allow Viewing Wholesale Channel Loans – This allows the user to view loans they have access to within their pipeline.
  - b. Allow Creating Wholesale Channel Loans – This allows the user to upload a 3.4 file to create a loan within the system.



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

- Company Information:** Client Company Name (00-ARC TEST\_COMPANY), Client Company ID (25e1878b-8c51-4cb8-aca6-7534a15c17ab)
- User Name (Optional):** Includes a 'Lookup' button and a 'Send registration email' checkbox (checked).
- Personal Information:** First Name (Sally), Last Name (Buyer), User Name (SBuyer@noemail.com), Email Address (SBuyer@noemail.com), Will Call ID (Optional) (222222), Cell Phone (222-222-2221), Phone Number (222-222-2221).
- Loan Access Level:** Radio buttons for Corporate and Individual (Individual is selected).
- Portal Mode Access:** A red box highlights this section, which includes checkboxes for:
  - Allow Viewing Wholesale Channel Loans (checked)
  - Allow Creating Wholesale Channel Loans (checked)
  - Allow Viewing Correspondent Channel Loans (unchecked)
  - Allow Creating Correspondent Channel Loans (unchecked)

10. Choose User Roles by clicking **"Add Role"**
  - 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 Loan Officer and Processor, assign both functions).
    1. **Loan Officer:** Assign this for a Loan Officer user, and to receive automated loan status notifications.
    2. **Processor:** Assign this if the user is processing the transaction, and to receive automated loan status notifications.
    3. **Portal Admin:** Can only be assigned by Arc Home



The screenshot shows the 'Choose User Roles' table with the following columns: Role, Company Name (ID), Assign Loan Officers, Licensed States, and Action.

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

Below the table, there is a red arrow pointing to the 'Add Role' button and a message: 'Please add atleast one role'.

11. Manage Permission - Click **"Accept Default"**
12. Click **"Create User"**



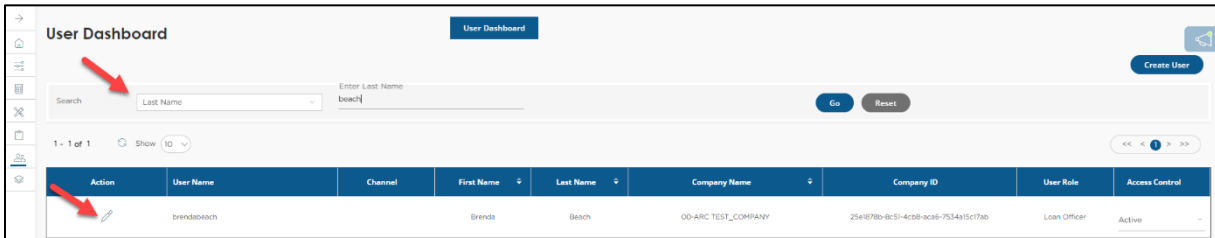
The screenshot shows the 'Manage Permission' dialog box with the following text and buttons:

Please Accept Default or Edit Permission

Buttons: Accept Default, Edit, Cancel, Create User

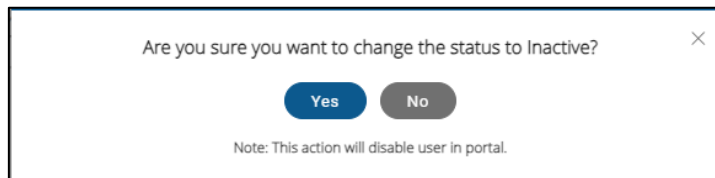
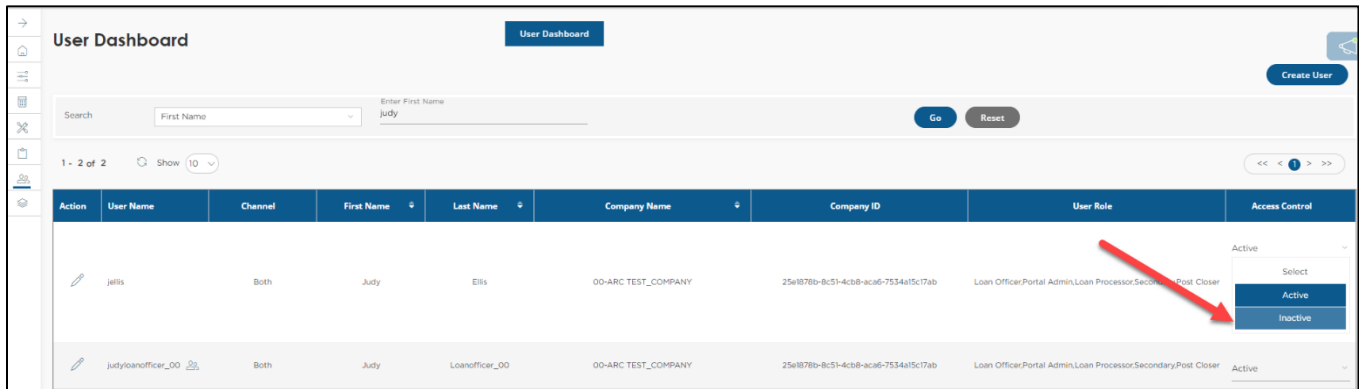
If you wish to Edit and/or Update and existing user, follow the below:

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



**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




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 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.**