

MMI – Mortgage Market Intelligence

Completed by E360 Help Desk

Screen shots, with identifier above the screen shot, so QC person(s) can identify what the screen shot is for.
Emails requesting account set up/termination must be added to the ticket for audit purposes.

Setup

Access: Branch Managers and above. Request for access to LO's/LOA's must be sent to Scott Brown for approval.

Click <https://mmi.run/l/intelligence>

Click "Manage Seats" from the hamburger menu

The screenshot shows the MMI.io interface. At the top right, there is a user profile for 'Josh Hebert' from 'Highlands Residential Mortgage'. On the left, a vertical hamburger menu is open, displaying various sections: Leaderboard, Real Estate, Mortgage, Builders, Tools, My Activity, Prospect List, Saved Searches, CRM Push History, and Manage Seats. A red arrow points to the 'Manage Seats' option at the bottom of the menu.

Click "Add Team Member" tab

The screenshot shows the 'Team Members' tab selected. Below it, there are two buttons: 'Add Team Member' and 'Saved Permissions'. A red arrow points to the 'Add Team Member' button.

Enter First Name, Last Name, Mobile Number, Email address and NMLS (if Loan Officer)
 Permissions for Loan Officers:

Permissions	Notes
Agent Tracking Alerts	
Builder Research	
Company Wallet Share	Granted to Branch Managers, Executive and Recruiter staff Only
Loan Officer Tools	
Manual Property Monitoring	
Past Property Tracking Alerts	
Property/County research	
Title Explorer	
View LO Contact Details	
Wholesale Insights	Granted to Executive and Recruiter staff only

Add Team Member

First Name Last Name

Phone Number (optional) 10 digit phone number

Email Address

NMLS (if Loan Officer)

Permissions

<input type="checkbox"/> Admin Center	<input checked="" type="checkbox"/> Disable Win-Back Opportunities
<input checked="" type="checkbox"/> Agent Tracking Alerts	<input checked="" type="checkbox"/> Loan Officer Tools
<input checked="" type="checkbox"/> Builder Research	<input checked="" type="checkbox"/> Manual Property Monitoring
<input type="checkbox"/> Company Wallet Share	<input checked="" type="checkbox"/> Past Property Tracking Alerts
<input type="checkbox"/> Disable Leaderboard Access	<input checked="" type="checkbox"/> Property/County research
<input type="checkbox"/> Disable Mortgage Data	<input checked="" type="checkbox"/> Title Explorer
<input type="checkbox"/> Disable Prospect Opportunities	<input checked="" type="checkbox"/> View LO Contact Details
<input type="checkbox"/> Disable Real Estate Data	<input checked="" type="checkbox"/> Wholesale Insights

 **Create**

Click "Create"

Once user created, Search for user and take screenshot of account active