

Clear Capital

Completed by e360 Team

Assigned to Accounting and Appraisal Desk users ONLY

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:

Navigate to <https://secure.clearcapital.com>

Click “My Account”, then “New User”

ClearCapital

You are logged in as: April Sanchez | Highlands Residential Mortgage, Ltd. MY ACCOUNT LOG OUT

Orders List Place Order Reports Search Toolbox My Account 1 HDI Market Report Feb 2020 Email Support

My Clear Capital Team User Accounts Edit My Account Report Tools Search: Go

Highlands Residential Mortgage, Ltd.: Manage User Accounts

Account Billing Contact: Terra Johnson
accounts payable@highlandsmortgage.com
4693647046

Billing Address: 12001 N. Central Expressway, Suite 750
Dallas TX 75243

+ New User 2 Show Active Only

Enter Login Username: *NOTE: Username convention is Firstname.Lastname, if that username exists add a 1 at the end.*

Enter Data in fields 4 through 9, then click “Add User”

Orders List Place Order Reports Search Toolbox My Account HDI Market Report Feb 2020 Email Support

My Clear Capital Team User Accounts Edit My Account Report Tools Search: Go

Highlands Residential Mortgage, Ltd.: Manage User Account

Return to User List

User Information

Login Username: 4 3 Username: Firstname.Lastname Ex: John.Smith

Account Active: Yes No

Full Name: 5

Email: 6

Phone: 7

Mobile Phone:

Customer Identifier:

Roles

Create Orders	Provides the ability to create orders via the ClearCapital Customer Site	8	9
View All Orders	Provides the ability to view all orders created by other users via the ClearCapital Customer Site		
Accounts Payable	Provides the ability to view invoices via the ClearCapital Customer Site		
User Management	Provides the ability to administer (add/edit/remove other users via the ClearCapital Customer Site		

10 Add User