

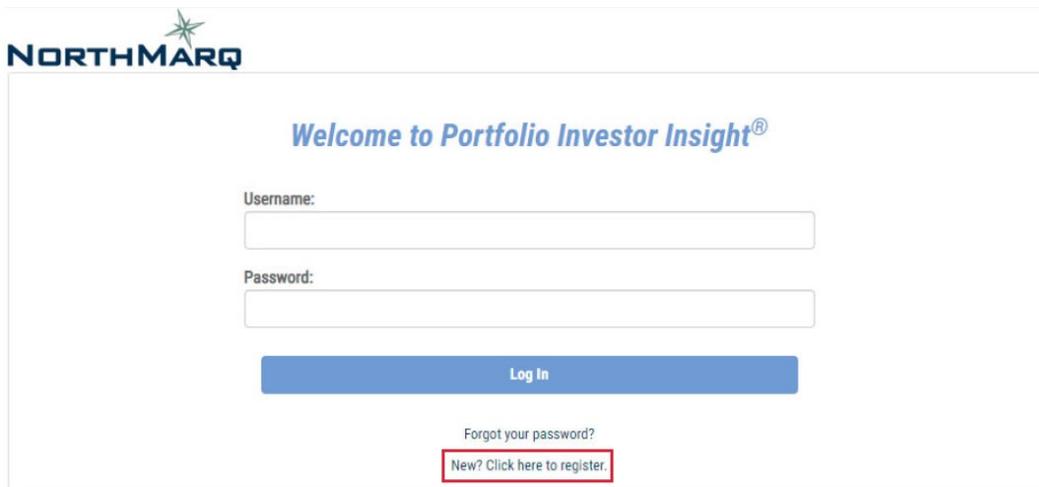
# New User Account Registration Guide

## Tips for a successful registration...

- Portfolio Investor Insight should be accessed using Google Chrome.
- Be sure to clear your browsing history in Google Chrome prior to completing registration.
- For any issues with registration, please reach out to [LenderPortal-PII@northmarq.com](mailto:LenderPortal-PII@northmarq.com) or 952-837-8723 for assistance.

## Registering a New Account

1. Using Google Chrome, navigate to <https://pii.northmarq.commloanservices.com/pii>.
2. From the Portfolio Investor Insight login page, click on *New? Click here to register*. This will bring you to the New User Registration screen.



**NORTHMARQ**

*Welcome to Portfolio Investor Insight®*

Username:

Password:

**Log In**

[Forgot your password?](#)

[New? Click here to register.](#)

3. Under User Information, enter your username, password, and email address.
  - Your password must be between 7 and 10 characters long, and contain at least 4 letters, 1 number, and 1 special character.
  - Personal email addresses may not be used. Your email address must contain your organization’s email domain, as this information will be used to confirm that you are a verified user, in addition to what access should be granted upon registration.

4. Complete all remaining personal and company related required fields (\*) and click *Save* at the bottom of the page.
5. Once your information has been saved, you will be prompted to choose three security questions. All answers to the security questions must be different. Click *Save Changes*.



### Create Security Questions

Please setup your security credentials by choosing three (3) personal security questions and answers to be used to confirm your identity.

Save Changes Return to Login

6. If your security questions have been saved successfully, you will receive an alert to indicate that your information has been saved. This completes your account registration.

Please setup your security credentials by choosing three (3) personal security questions and answers to be used to confirm your identity.

- Your information has been saved.

7. Clicking *Return to Login* will bring you back to the Portfolio Investor Insight login page where you can log in using your newly registered credentials. **Please note, you will not have access to view loans or portfolios until access has been granted to you by a NorthMarq representative. See Step 8 below.**
8. Shortly after your registration is complete, NorthMarq will receive an automated email notification confirming your registration. NorthMarq will verify your credentials and grant portfolio access based on your organization's permissions. You will receive an email once access has been granted.