



BND PORTAL

# Participating Lender Admin User Guide

MAY 2023

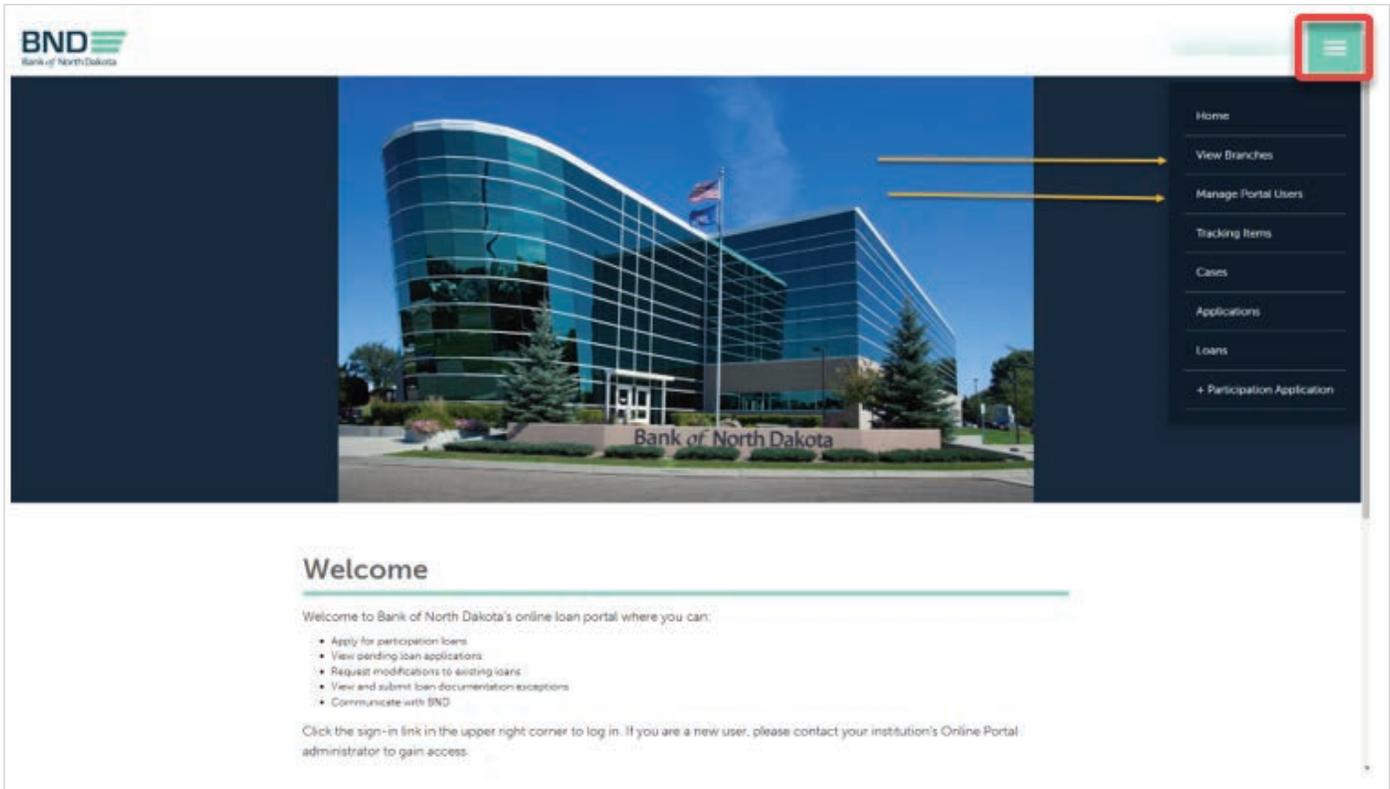


BND PORTAL

# Participating Lender Admin User Guide

## View Branches and Manage Portal Users

On the first screen of the participation portal, click on the green hamburger menu in the top right-hand corner. The drop-down list will show the options available, but only a Portal Admin will see the options shown below – View Branches and Manage Portal Users.



## View Branches

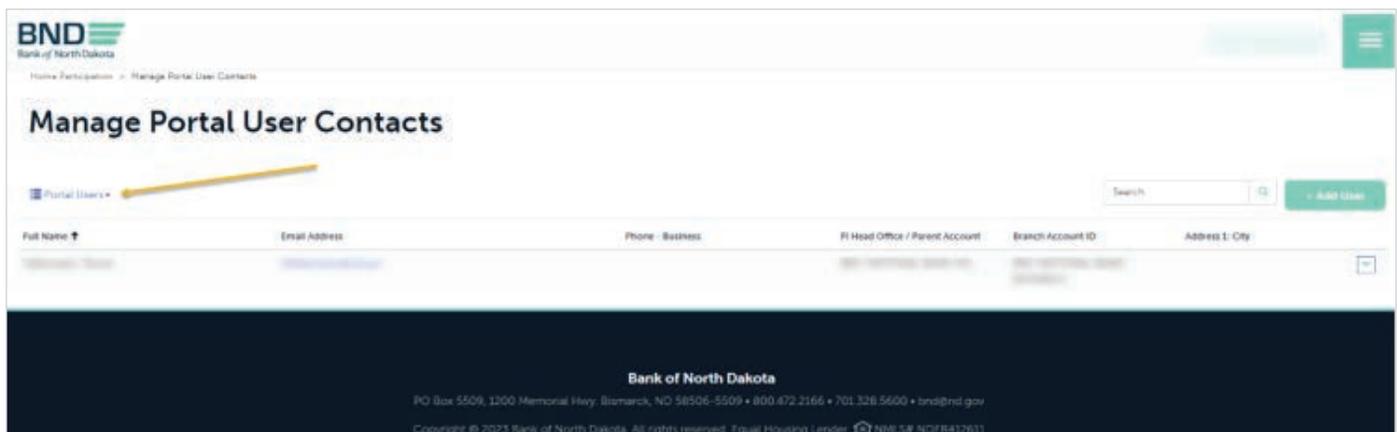
Below is the screen that will appear if you select “View Branches”.

This screen shows the branches that BND has set up for your institution. If a new branch needs to be created to use the portal, please contact BND.

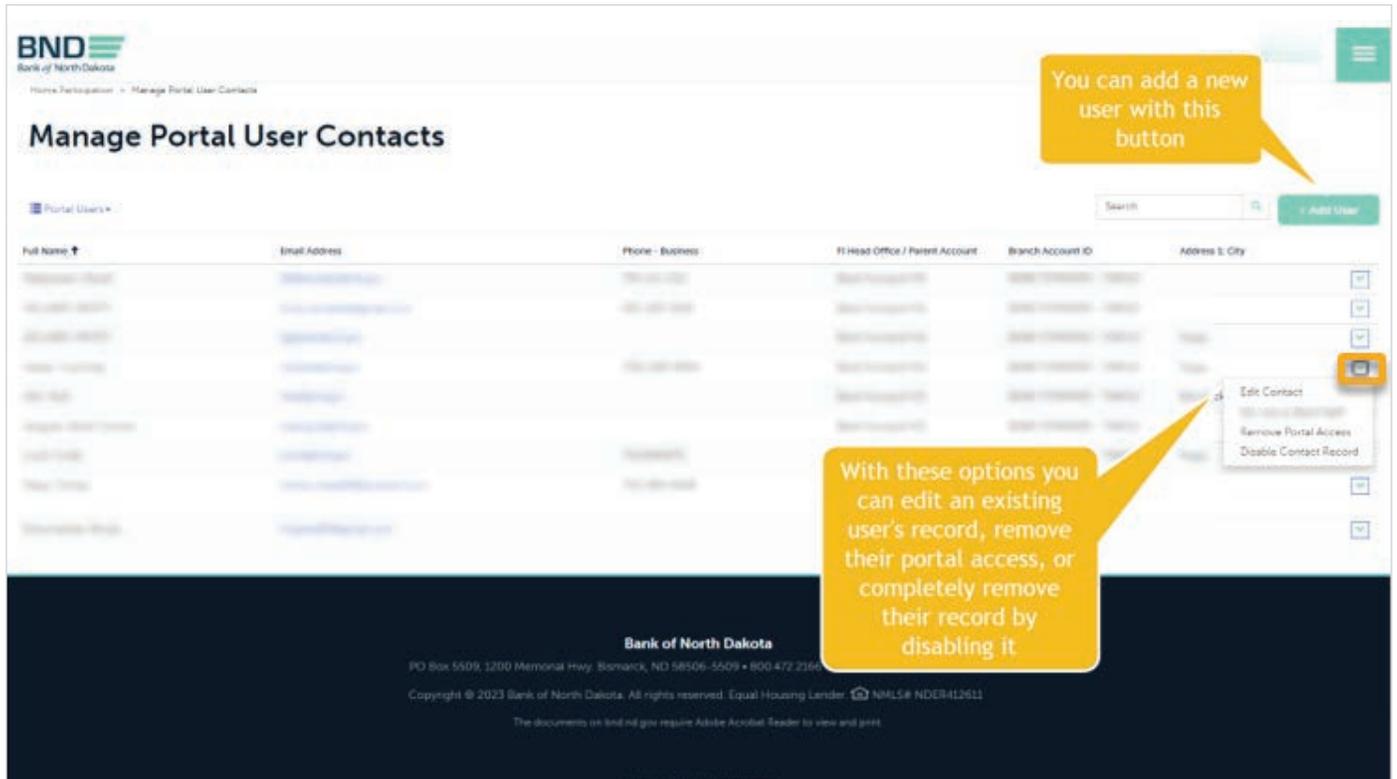


## Manage Portal Users

Below is the screen that will appear if you select “Manage Portal Users” on the home page. This is where you can add or remove portal users for your institution.



The default screen that will appear shows your current portal users:



As shown above, you can click the green button to add a new user for your institution, such as a new employee that needs portal access, or you can click the dropdown on the right side of an existing user and edit a user's information such as their phone number or the branch they work at. You can also remove their access if they are no longer an employee "disable contact record" or no longer need portal access "remove portal access".

When you click on the "+ add user" button, the following screen will appear. After the fields are completed, click on the "submit" button at the bottom.

The form contains the following fields:

- First Name \*
- Middle Name
- Last Name \*
- Head Office
- Branch \*
- E-mail \*
- Business Phone \* (with placeholder text: Provide a telephone number)

A green 'Submit' button is positioned at the bottom center of the form.

If you add a new user as shown above, they will not automatically become a portal user. They will show up in the Non-portal Users screen which is shown below. Note: You may need to refresh your screen to see the new user show up.

The interface includes a navigation menu with 'Non-Portal Users' selected. A table lists user details with columns: Full Name, Phone - Business, Head Office / Parent Account, Branch Account ID, and Address E- City. A '+ Add User' button is in the top right. A dropdown menu on the right offers actions: 'Send Invite', 'Edit Contact', and 'Disable Contact Record'.

Callout boxes provide the following information:

- "You can add a new user with this button" (pointing to the '+ Add User' button).
- "If you dropdown this field, you can also choose Non-Portal Users" (pointing to the 'Non-Portal Users' dropdown).
- "With these options, you can send an invite to an employee who needs access to the portal or you can disable their record if they are no longer with your institution" (pointing to the 'Send Invite', 'Edit Contact', and 'Disable Contact Record' options).

You can now click on "send invite" on the right-hand dropdown to give a user portal access. They will receive an email with registration instructions.

**Please note:** Once the invite is sent to the non-portal user, they will no longer appear in the list of non-portal users. They will appear in the list of portal users once they create an account with the invite that was sent to them.



Home Participation > Manage Portal User Contacts



## Manage Portal User Contacts

Non-Portal Users

Full Name ↑	Email Address	Phone - Business	FI Head Office / Ps	
Boop, Betty				<div><span>Edit Contact</span> <span>Disable Contact Record</span> <span>Reactivate User</span></div>

With the option 'Reactivate User' you can restore access to the portal if they already had access and it was removed.

**Please Note:** If you are trying to restore access to a prior portal admin, please contact BND as they will need to complete this process. All other users can be restored from the "Reactivate User" feature.



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