

Overview

The BOOST Portal is FGMC's Wholesale Partner Portal, which connects directly to our loan origination system (LOS). BOOST provides a central online location where you can originate, process, and monitor loans. This job aid is intended to help answer common questions/issues within the BOOST portal. If you have additional questions, please reach out to your Account Executive.

- 1. I received an error message. I cannot do X, Y, Z.**
 - a. Try to refresh your screen by clicking the refresh icon or pressing F5 on your keyboard.
- 2. What changes/actions can I take after I submit my file to FGMC to review?**
 - a. Once a loan is submitted to FGMC to review, the following actions are available within the loan file.**
 - Product and Pricing
 - Upload Documents
 - Upload Conditions
 - Submit a Change of Circumstance
- 3. What changes/actions are available after I lock my loan within the portal?**
 - a. Once the loan is locked, some fields on the URLA form are no longer editable. If you need to make changes to your URLA form, these changes will have to be updated manually within the portal.
- 4. Can I reupload a 3.2 file after I have registered the loan in the BOOST Portal?**
 - a. No, please do not try to reupload a new URLA form once the loan is registered. Once the loan is registered, changes to the URLA form must be entered manually in the portal.
- 5. How can I reset my forgotten password?**
 - a. Click the forgot password link on the login page. Within a few minutes, you will receive an email to reset your password.
 - b. If the link is not working, contact your AE to review your company settings.
- 6. I can only view and edit my loans. I need to have access to view and edit all the loans for my company.**
 - a. Please speak to your company's administrator. This person has the assigned persona to adjust your profile and access within the portal. In addition, the account administrator can review our [Account Management](#) video for step-by-step instructions.
- 7. How will I know when my Loan Estimate (LE) was sent and signed by the customer?**
 - a. You will receive an email with the LE is sent and signed by the customer. In addition, you can access the Disclosure Tracking screen within the portal to review these dates.
- 8. FGMC is currently working on the file. What actions can I take?**
 - a. If FGMC is working on your file, no actions can be taken in the loan file.
- 9. Can I float a loan in the BOOST Portal?**
 - a. Yes, select the **update encompass** option from the Optimal Blue pricing screen.
- 10. What browser should I use?**
 - a. We suggest using Chrome for the best user experience.

11. Can I run a loan file through both DU and LPA in the BOOST portal?

- a. Yes, you can run both DU and LPA within the portal.

12. Why am I receiving an error message when running LPA in the portal?

- a. Review your URLA application and ensure all required fields are completed correctly with correct spellings.
- b. Exit the loan file, then go back into the file to rerun the LPA.

13. Why can't I find my loan in my Pipeline?

- a. Refresh your screen. You can refresh your screen by clicking the refresh icon on your browser or pressing F5 on your keyboard.
- b. Verify you have the correct persona with your account administrator to access the loan.

14. I cannot price or lock a loan.

- a. Ensure you have completed all fields with a red star* including the requirement to enter your requested rate or price in the bottom right corner.

* Target

Rate Price

15. The loan fails to register.

- a. Review the 3.2 file to correct any oddities (i.e., county name spelling, extra spaces, etc.). Be sure to review each field. The field item in the 3.2 must match exactly on "standardized" names such as city and county names.

16. I cannot Save or submit my loan.

- a. Confirm with your Account Executive that your company has been approved to process loans with FGMC.

17. The Loan Program Field did not populate.

- a. The field is only populated from Optimal Blue when a loan is floated or locked. This is the functionality of TPOC's interface with OB. If you wish to see the pricing of a similar loan with different products without floating or locking, use the scenario tab.

18. I am unable to price a Government loan.

- a. If the First Lien Amount field is showing the Total Loan Amount, the loan will likely be ineligible for the desired government product. This is due to an inaccurate URLA application at submission. After uploading the 3.4 file into BOOST, validate the fields on the URLA application for accuracy.

19. I cannot reissue credit via DU.

- a. There are two paths for Factual Data Users, Legacy and Enterprise.
 - i. **Legacy** users have reference/report IDs starting with a K or L
 - If you are a Legacy user, call Factual Data (800-274-3389) and speak with the account service department. Provide FGMC's Encompass ID 3000803888. You will be provided a universal password to reissue the credit through our BOOST/SOAR systems.
 - ii. **CBC Enterprise** users have a reference/report ID that are entirely numerical.
 - If you are an Enterprise user, select Factual Data as the credit company and use your regular credit credentials. If you are still unable to reissue credit, select CBC as the credit company.

Note: Please ensure you only have one TPO Connect window open. If TPO Connect is open with other lenders, it can cause errors and slow the system.