

Overview

Once approved by FGMC, we will assign a contact from your company to be the portal account administrator (i.e., the one who will manage your company’s user accounts and update company information). The account administrator will receive an email from us that provides a link to the portal, along with a login name and a temporary password. The account administrator has additional access to add, delete, and disable users or adjust a user’s persona to have additional access to view all company loans and/or edit all company loans. Review the chart below for the available personas and access within the BOOST portal.

Persona	General Settings			Pipeline and Loans		
	Manage Company Account	Register Loans	Scenarios	View Messages	Access to Fees	Product and Pricing
Loan Officer		X		X	X	X
Loan Processor		X		X	X	X
Administrator	X					

Persona Descriptions

- **Administrator (Wholesale):** This user has access to administer changes to existing users and create new ones. If the administrator needs access to complete loan actions within the portal, you must also have one or more of the personas assigned below.
- **Loan Officer (Wholesale):** This user can create and manage their existing loans, access fees, and lock loans.
- **Loan Processor (Wholesale):** This user can create and manage their existing loans, access fees, and lock loans.