

Once approved by FGMC, we will assign a contact from your company to be the Boost 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 Description

**Administrator (Wholesale):** This user has access to administer changes to existing users and create new ones.

If **Administrator** needs access to complete Loan Actions (E.g. Originate, pricing and processing) within the Portal, must have **Loan Officer (Wholesale)/Loan Processor (Wholesale)** personas assigned.

If **Administrator** or any assigned personnel, need to view and edit Team’s loans, access to be granted by checking the box “**View access to team’s loans**” and “**Edit team’s loans**” under “**TPO Access to Loans**”

**Loan Officer (Wholesale):** This user can create and manage their assigned loans, access fees, and lock loans.

**Loan Processor (Wholesale):** This user can create and manage their assigned loans, access fees, and lock loans.

If you have both Non-Del and Wholesale account, username convention should be as follows:

When Non-Del is **primary** = username will be the email, and for Wholesale username begins with **ws\_** then the email.

When Wholesale is **primary** = username will be the email, and for Non-Del username begins with **nd\_** then the email.

## Contact List:

Required Information*			Personas			Additional Access	
First Name	Last Name	Email	Loan Officer	Processor	Company's Admin	View Access to Team's Loans	Edit Access to Team's Loans