

Access to Boost

Once approved by FGMC, FGMC will assign a manager from your company to be the Boost Portal Account Administrator (i.e., the one who will manage user accounts, update company information, add new users, and assign the user personas). The Account Administrator will receive an email from us that provides temporary password. The Account Administrator has additional access to add, delete, and disable users or adjust a users' 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

1. **TPO User Admin:** This user has access to administer changes to existing users & create new users.

Note: If Administrator requires access to complete Loan Actions (IE: Originate, pricing and processing) within the portal, they must have **Loan Officer + TPO Pricing/Loan Processor** personas assigned

Note: If Administrator or any assigned personnel needs to view & edit Team's loans, access granted by checking the box "**View access to Team's loans**" and "**Edit Team's loans**" under "**TPO Access to Loans**"

2. **TPO Loan Officer & TPO Pricing:** This user can create & manage their assigned loans, access fees, and lock loans
3. **TPO Processor & TPO Pricing:** This user can create & manage their assigned loans, access fees and lock loans

Required Information*			Personas			Additional Access	
F Name	L Name	Email	Loan Officer+ Pricing	Processor+ Pricing	Company's Admin	View Access to Team's Loans	Edit Access to Team's Loans


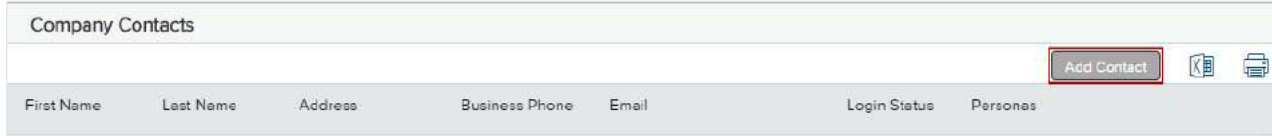
Initial Access to the Portal

Step	Action
1	Select the link provided in the email to open the portal.
2	Log in to the portal using your email address and the temporary password provided in the email.
3	Create a new password on the Change Password page.
NOTE: Be sure to keep track of your new password. FGMC will not have access to it.	

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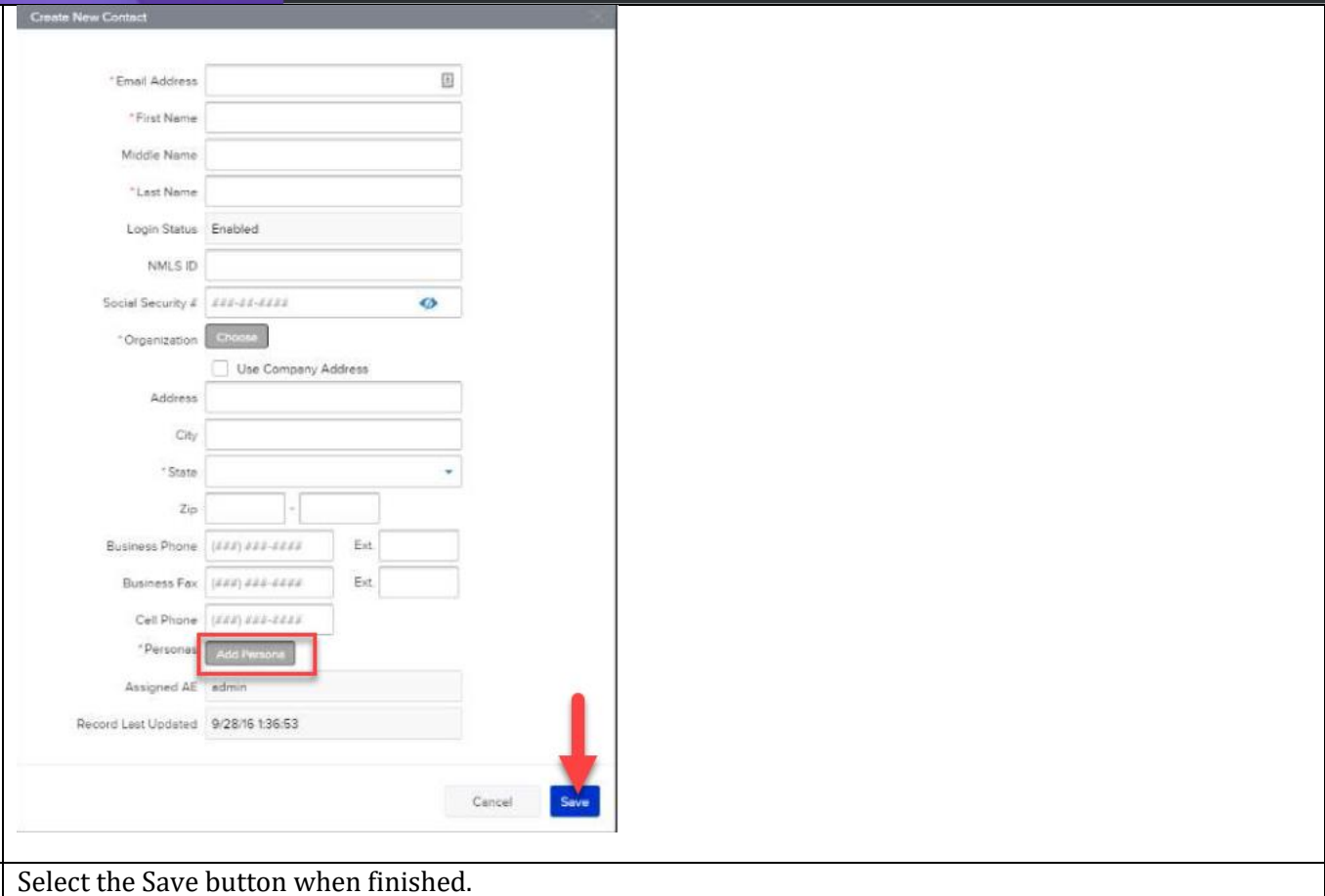
Add Users to the Portal:

For other users to gain access to the portal, the manager must create a contact record for each user. Follow the steps below to add a new user to your account. Notes: This option is only available to users with the Account Management functionality.

Step	Action
1	<p>Select your username in the top-right corner and click Manage Account</p> 
2	<p>Click the Company Account tab.</p>
3	<p>Scroll to the Company Contacts section, and then select Add Contact to add a new user who will be able to use the portal.</p> 
4	<p>Enter the required* information for the user.</p>

Fill in appropriate fields:

Step	Action
1	<p>Fill in Organization Field: this enables you to select the branch within the organization where this contact should be created.</p>
2	<p>Click Choose to select the organization option, then select the organization entry and click Save.</p>
3	<p>Fill in Persona Field: this field enables you to select an available persona to assign to the TPO Contact.</p>
4	<p>Click Add Persona to select the persona for the contact, and then select one or more personas and click Save.</p>

	
5	Select the Save button when finished.

Notes: The user will receive an email providing a link to BOOST, along with a login name (their email address) and a temporary password. The user can log into BOOST; however, their licensing information needs to be submitted to and then approved by, FGMC before they can submit loan files. (This rule applies to branches that will use the portal as well.)