Add Users to the GMFS Client Portal

In order for other users to gain access to the Client Portal, the manager must create a contact record for each user. (Note: For your convenience during our transition all known users have already been added)

To Create a Contact Record:

- Click your user name in the top right corner, and then select Manage Account.
- Click the Company Account tab.
- Scroll to the Company Contacts section, and then click Add Contact to add a new user who will be able to use the Client Portal.

Company Contacts										
								Add Contact	X	Ē
First Name	Last Name	Address	Business Phone	Email		Login Status	Personas			
										*

- Enter the required information for the user. Required fields are marked with a red asterisk.*. Please make sure to add licensing info for each LO user, licensing will be verified upon loan submission.
 - Click **Choose** to select the organization field, and then select the organization entry and click **Save**. The Organization field enables you to assign a user to a particular branch within your organization, if applicable.
 - The Persona field enables you to select an available persona to assign to the TPO Contact. Click Add Persona to select the persona for the TPO contact, and then select one or more personas. Note that every file requires an assigned Loan Officer and Processor, so if your Loan Officers process their own files, you should give them both personas.
 - Viewing and Editing permissions can also be assigned by user, regardless of persona.

Create New Contact	×
* Email Address	
* First Name	
Middle Name	
*Last Name	
Login Status	Enabled
NMLS ID	
Social Security #	***-***
* Organization	Choose
1	Use Company Address
Address	
City	
"State	Select -
Zip	-
Business Phone	Ext.
Business Fax	Ext.
Cell Phone	
* Personas	Add Persona
	View access to team's loans Edit team's loans
Assigned AE	Ryan Otto
B Record Last Updated	6/20/18 11:10:39
	Cancel Save

- When finished, click the Save button.
- The user will receive an email (shown on pg. 6) with link to the Client Portal, along with a log in name (their email address) and a temporary password. Requests to add a new Company or new branch of existing company must be made to your District Director.

