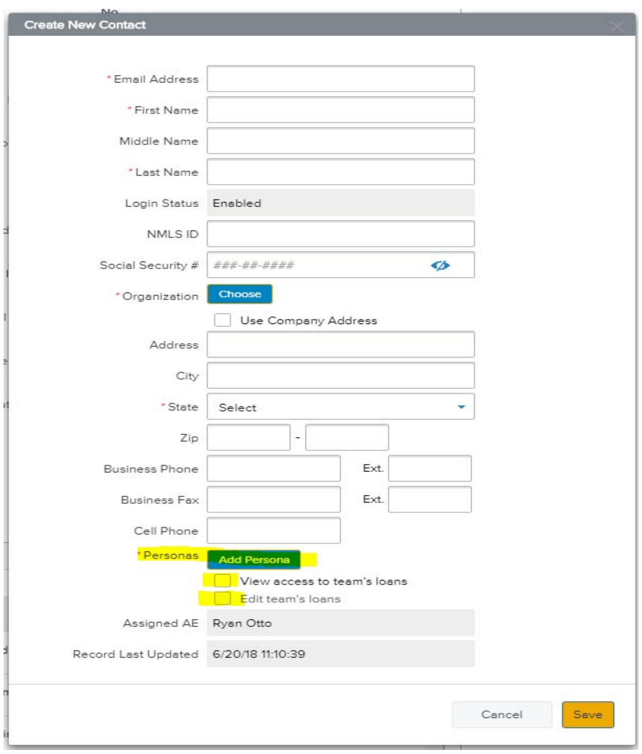
Add Users to the GMFS Client Portal

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.

- 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.



- 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.