

# B.O.L.T. TRAINING

## Lesson 05 - B.O.L.T. Interface



# In This Training We Will Discuss

- B.O.L.T. Interface
  - Main Interface Pages In B.O.L.T.



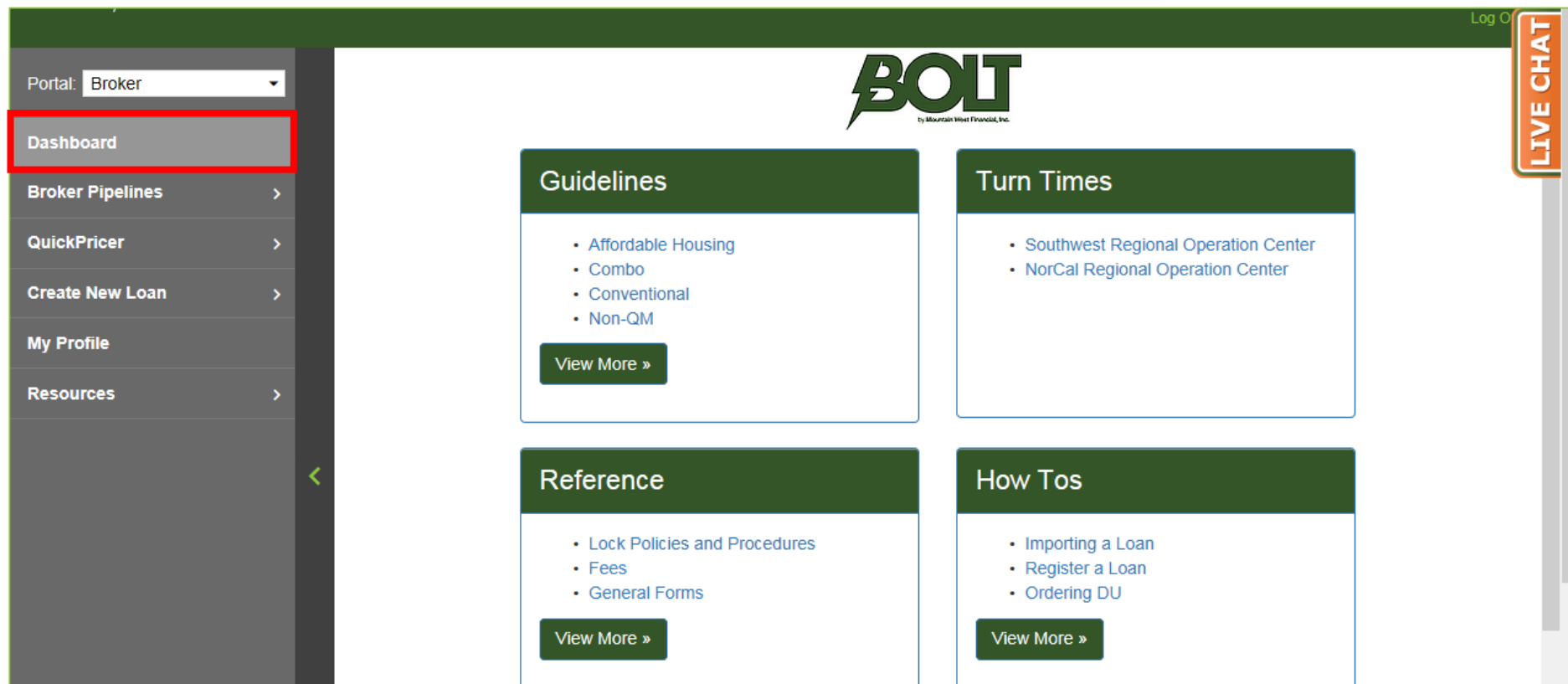
# B.O.L.T. Interface



# Main Interface Pages In B.O.L.T.

- Dashboard
- Broker Pipelines
- QuickPricer
- Create New Loan
- My Profile
- Resources





## Dashboard

This page contains links to Mountain West Financial Wholesale information.

Portal: Broker

Dashboard

Broker Pipelines

Loans

Initial Disc Waiting For Signatures

Configure Pipelines

QuickPricer

Create New Loan

My Profile

Resources

Loans

Search Criteria

Loan Number

Last Name

SSN (Last 4)

Status Date

Loan Status

SEARCH

CLEAR SEARCH

Display most recent 25 loans assigned to anyone

Loan Number	Conditions	Last Name, First Name	Loan Amt	Loan Status / Status Date	Lock Status / Lock Exp. Date	Loan Officer / Processor
1000048072	4 Conditions	FIRSTIMER, ALICE	\$240,000	Registered 12/17/2018		LO Matthew Baker

LIVE CHAT

## Broker Pipelines

This page contains loans belonging to the Broker and is where they can be managed. See **Lesson 06 - Broker Pipelines** for more information.

Portal: Broker

Dashboard

Broker Pipelines >

**QuickPricer** v

Launch Quick Pricer

Create New Loan >

My Profile

Resources >

Quick Pricer

No Pinned Results to Compare

Horizon of borrower interest:  months [explain](#)

Property & Loan Info x

Property Information

Zip Code  x State x

County x

City x

In Rural Area? ☐ Yes [explain](#)

Property Use Primary Residence

Has Non-Occupant Co-Borrower? ☐ Yes

Property Type SFR

Structure Type Detached

New Construction? ☐ Yes

Results Filter

Term

☐ 10 Year
☐ 15 Year
☐ 20 Year

☐ 25 Year
☒ 30 Year
☐ Other

Amortization Type

☒ Fixed
☐ 3 Year ARM
☐ 5 Year ARM

Product Type

☐ 7 Year ARM
☐ 10 Year ARM
☐ Other

☒ Conventional
☒ HomeReady
☒ Home Possible

Payment Type

☒ P&I
☒ I/O

[Advanced Filter Options](#)

Alert Messages

- Pricing subject to change with the addition of applicant/credit data.
- Missing required data on "Property & Loan Info" tab. Please complete in order to price.
- Total income for this file is currently \$0.00.
- Estimated credit score is 0. If the borrower has a credit history, please enter an estimated score for mo

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## QuickPricer

This page contains a pricing engine in which the Broker can run quick scenarios. See **Lesson 07 - QuickPricer** for more information.

Portal: Broker

**Create New Loan**

**Import Loan File**

\* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen \*

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. \*

IMPORT

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

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## Create New Loan

This page contains ways for a Broker to create a new loan. See **Lesson 08 - Creating A New Loan** for more information.



Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan >

**My Profile**

Resources >

Log Out

**LIVE CHAT**

**My Profile** SAVE

Personal Information Login Settings System Access Service Credentials

\* Indicates required fields

**Personal Information**

Name

First Name \* Middle Name Last Name \* Suffix

**Contact Information**

Phone \* Fax Cell

☒ Private: For multi-factor authentication only

Pager

## My Profile

This page contains information about the Broker logged in.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan >

My Profile

**Resources** ▾

Rate Sheet

Broker Agreement

Elite Partner Benefits

Log Out

**LIVE CHAT**

### My Profile

SAVE

Personal Information Login Settings System Access Service Credentials

\* Indicates required fields

#### Personal Information

Name

First Name \* Middle Name Last Name \* Suffix

#### Contact Information

Phone \* Fax Cell

☒ Private: For multi-factor authentication only

Pager

## Resources

This contains links to Mountain West Financial Wholesale information.



# THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>