

# B.O.L.T. TRAINING

## Lesson 06 - Broker Pipelines

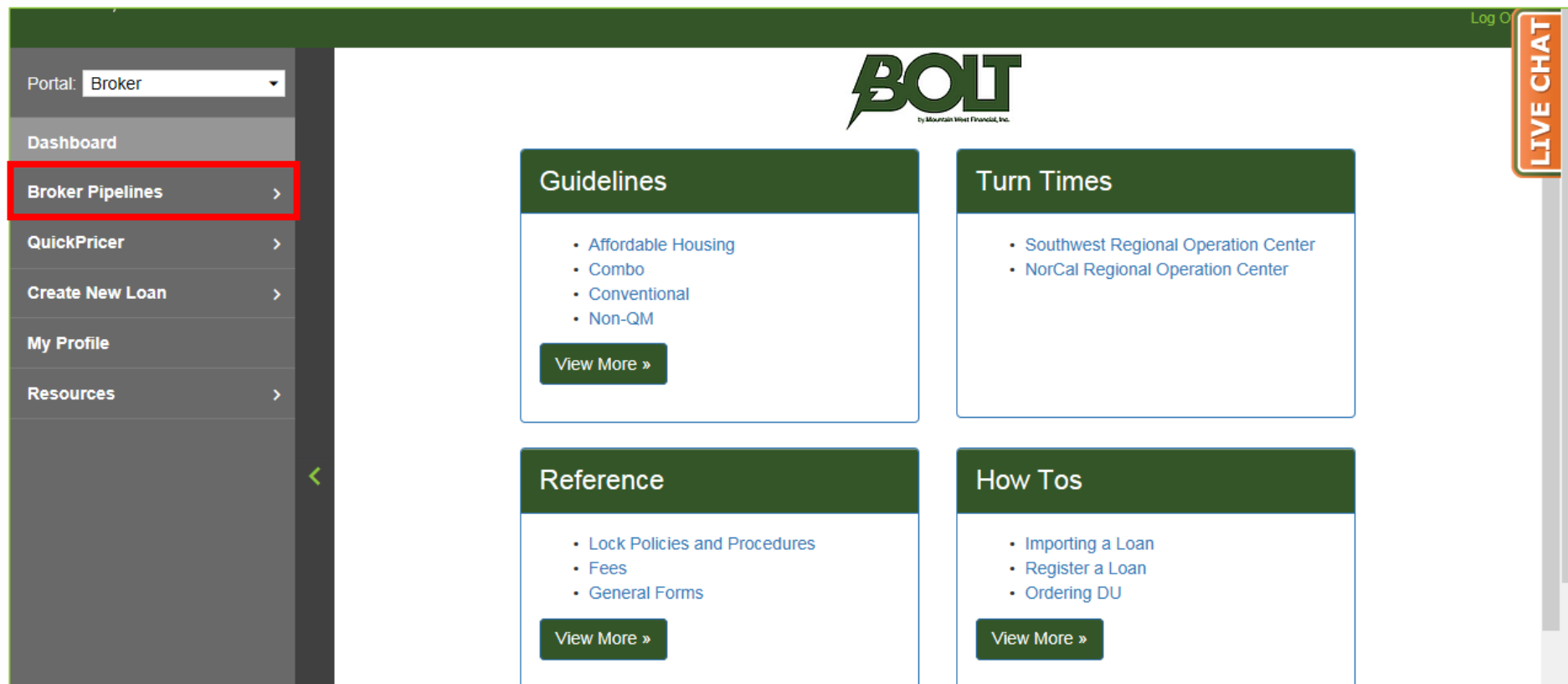


# In This Training We Will Discuss

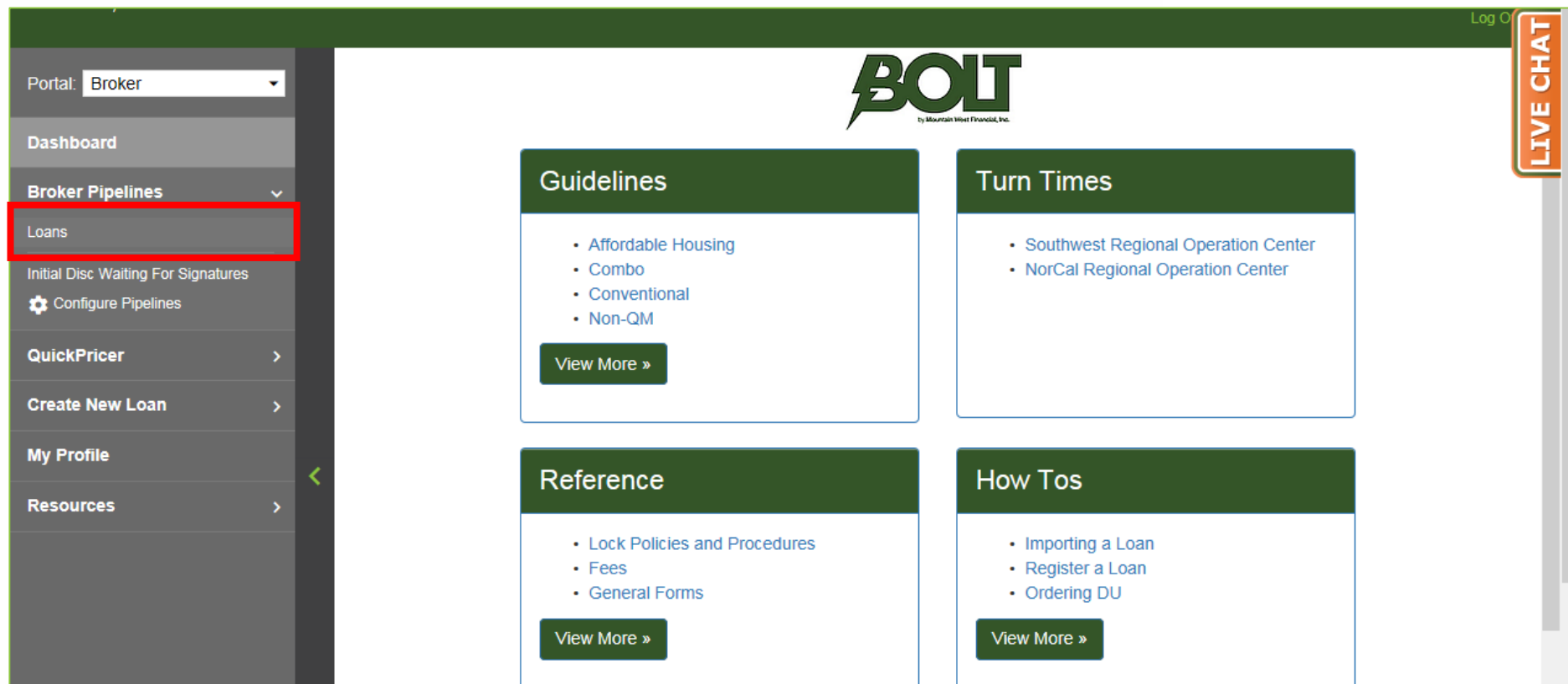
- Accessing Broker Pipelines
- Accessing Loans in Broker Pipelines
- Accessing Pages Within A Loan
  - Main Pages Within A Loan



# Accessing Broker Pipelines



1. Click “Broker Pipelines”.



2. Click “Loans”.

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
 <a href="#">1000048072</a>	<a href="#">4 Conditions</a>	FIRSTIMER, ALICE	\$240,000	Registered 12/17/2018		<b>LO</b> Matthew Baker

## To Search Loans In The Pipeline

3. Enter the information that the loans need to be searched by.

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:

Display most recent  loans assigned to

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**

## To Filter Loans In The Pipeline

4. Click on the header of the column that the loans need to be filtered by.



# Accessing Loans In Broker Pipelines

Portal: Broker

Dashboard

Broker Pipelines

Loans

Initial Disc Waiting For Signatures

Configure Pipelines

QuickPricer

Create New Loan

My Profile

Resources

Loans

Loan Number

Last Name

SSN (Last 4)

Status Date

Loan Status

Search Criteria

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

- Click on the Loan Number of the loan that needs to be opened.

Pipeline

Loan Number:

1000048072

Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

Property Address:

1209 Nevada, REDLANDS, CA 92374

Loan Type:

Conventional

Credit Score:

760 

SAVE

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Status and Agents

Status

Current Status: Registered

Status Date: 12/17/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

12/17/2018

Registered

12/17/2018

Doc Check

Funded

Agents

Assigned Agents in \*TPO LQB Testing

Loan Officer [re-assign](#)

Processor [assign](#)

Name: Matthew Baker

Name:

Email: matthew.baker@mwfinc.com

Email:

Phone: (909) 793-1500


Phone:

LIVE CHAT

## 2. The Loan window will appear.



# **Accessing Pages Within A Loan**

 Pipeline

Loan Number: 1000048072    Borrower Name: ALICE FIRSTIMER    Loan Amount: \$240,000.00    Property Address: 1209 Nevada, REDLANDS, CA 92374    Loan Type: Conventional    Credit Score: 760 ?    [SAVE](#)

**Status and Agents**

Status

Current Status: Registered    Status Date: 12/17/2018    Action: [view status certificate](#)    [CHANGE LOAN STATUS](#)

Loan Open    Registered    Doc Check    Funded

12/17/2018    12/17/2018

Agents

Assigned Agents in \*TPO LQB Testing

Loan Officer [re-assign](#)    Processor [assign](#)

Name: Matthew Baker    Name:

Email: matthew.baker@mwfinc.com    Email:

Phone: (909) 793-1500    Phone:

**Order Services**

**LIVE CHAT**

1. Click on the page that needs to be open.



# Main Pages Within A Loan

- Status and Agents
- Application Information
- Closing Costs
- Pricing
- Loan Information
- Rate Lock
- Disclosures
- E-Docs
- Conditions
- Order Services

Pipeline

Loan Number: 1000048072

Borrower Name: ALICE FIRSTIMER

Loan Amount: \$240,000.00

Property Address: 1209 Nevada, REDLANDS, CA 92374

Loan Type: Conventional

Credit Score: 760 ?

SAVE

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Status and Agents

Status

Current Status: Registered      Status Date: 12/17/2018      Action: [view status certificate](#)      [CHANGE LOAN STATUS](#)

Loan Open

Registered

Doc Check

Funded

12/17/2018

12/17/2018

Agents

Assigned Agents in \*TPO LQB Testing

Loan Officer [re-assign](#)

Processor [assign](#)

Name: Matthew Baker

Name:

Email: matthew.baker@mwfinc.com

Email:

Phone: (909) 793-1500

Phone:

LIVE CHAT

## Status And Agents

This page contains loan status, loan certificate and agent information.

Pipeline

Loan Number:

1000048072

Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

Property Address:

1209 Nevada, REDLANDS, CA 92374

Loan Type:

Conventional

Credit Score:

760 ?

SAVE

Status and Agents

Application Information

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E-docs

Conditions (4)

Order Services

Application Information

IMPORT FNM 3.2 FILE

ADD NEW APPLICATION

Applicant(s):

ALICE FIRSTIMER

1003 Page: Page 1 | Page 2 | Page 3 | Page 4

☐ The income or assets of a person other than the "Borrower" will be used...
 ☐ The income or assets of the Borrower's spouse will not be used...

I. TYPE OF MORTGAGE AND TERMS OF LOAN

Mortgage Applied for:

Conventional

Agency Case Number

Lender Case Number

1000023324

Purchase Price	Down Payment %	Equity / Down Pmt	Loan Amt	Amort. Type
\$300,000.00	20.000%	\$60,000.00	\$240,000.00	Fixed Rate
Upfront MIP / FF	Total Loan Amt	Note Rate	Qualifying Rate	
\$0.00	\$240,000.00	6.250%	6.250%	
Term	Due	Monthly Payment	Other Print Desc.	
360	360	\$1,477.72		

LIVE CHAT

## Application Information

This page contains the 1003.

Mountain West Financial, Inc. - B.O.L.T. Training - Lesson 06 - Broker Pipelines

01-JAN-19

Pipeline

Loan Number:

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Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

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Conventional

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760 ?

SAVE

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Closing Costs

Borrower-Responsible Closing Costs

Non-P&I Housing Expenses

Non Borrower-Responsible Closing Costs

A - Origination Charges

	Description/Memo	Paid to	Amount	Paid by	Payable	Date paid	
<a href="#">details &gt;</a>	Discount points	Lender	\$0.00	borr pd	at closing	12/31/2018	
<a href="#">details &gt;</a>	Loan origination fee	Lender	\$0.00	borr pd	at closing	12/31/2018	-
<a href="#">details &gt;</a>	Underwriting fee	Lender	\$995.00	borr pd	at closing	12/31/2018	-

+

B - Services You Cannot Shop For

LIVE CHAT

## Closing Costs

This page contains the fees listed on the Loan Estimate and Closing Disclosure.

Pipeline

Loan Number:

1000048072

Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

Property Address:

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Loan Type:

Conventional

Credit Score:

760 ?

Status and Agents

Application Information

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E-docs

Conditions (4)

Order Services

Pricing

Run Scenario in DO

Submit to DU (Seamless)

Run Scenario in DU

Submit to LPA (Seamless)

Submit to LPA

No Pinned Results to Compare

Horizon of borrower interest:

60 months

(explain)

Application #1

Property & Loan Info

Property Information

Street Address

1209 Nevada

Zip Code

92374

State

CA

County

San Bernardino

City

REDLANDS

In Rural Area?

☐ Yes

(explain)

Property Use

Primary Residence

Has Non-Occupant

Results Filter

Term

☐ 10 Year
 ☐ 15 Year
 ☐ 20 Year
 ☐ 25 Year
 ☒ 30 Year
 ☐ Other

Amortization Type

☒ Fixed
 ☐ 3 Year ARM
 ☐ 5 Year ARM
 ☐ 7 Year ARM
 ☐ 10 Year ARM
 ☐ Other

Product Type

☒ Conventional
 ☒ HomeReady
 ☒ Home Possible
 ☐ FHA
 ☐ VA
 ☐ US

Payment Type

☒ P&I
 ☒ I/O

[Advanced Filter Options](#)

Alert Messages

- Credit has not been ordered for Application #1. Please order credit for more accurate results.

LIVE CHAT

## Pricing

This page contains the pricing engine, where the loan can be priced, registered, locked, and credit and the automated underwriting system can be ran .

Pipeline

Loan Number:

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\$240,000.00

Property Address:

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Loan Type:

Conventional

Credit Score:

760 ?

SAVE

Status and Agents

Application Information

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Conditions (4)

Order Services

Loan Information

Loan Terms

FNMA Addendum

FHLMC Addendum

Loan Information

Loan Program

CF30 - CONF FIXED 30YR

Registered Loan Program

CF30 - CONF FIXED 30YR

view registration certificate

Lien Position

First

Total Loan Amount

\$240,000.00

Interest Rate

6.250%

Term/Due (months)

360 / 360

Amortization Type

Fixed

Days in Year

360

Qualifying Rate

6.250%

Interest Only Months

0 months

## Loan Information

This page contains general loan information.

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01-JAN-19

Pipeline

Loan Number:

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Borrower Name:

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Loan Amount:

\$240,000.00

Property Address:

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Loan Type:

Conventional

Credit Score:

760 ?

SAVE

Status and Agents

Application Information

Closing Costs

Pricing

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E-docs

Conditions (4)

Order Services

Rate Lock

Loan Program

CF30 - CONF FIXED 30YR

Registered Loan Program

CF30 - CONF FIXED 30YR

Registered Date

12/17/2018

Registration Comments

Originator Compensation Information [view lender comp plan details](#)

Amount

\$4,800.00

Net Points

2.000%

Paid By

Lender

Loan Status

Registered

Lock Status

Not Locked

Rate Locked Date

Lock Period

30 days

Rate Lock Comments

Lock Expiration Date

Lock Expiration Comments

LIVE CHAT

## Rate Lock

This page contains information about the rate once it has been locked.

Pipeline

Loan Number:

1000048072

Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

Property Address:

1209 Nevada, REDLANDS, CA 92374

Loan Type:

Conventional

Credit Score:

760 ?

SAVE

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Disclosures

Important Loan Dates

Application Date

12/17/2018

Registration Date

12/17/2018

Intent to Proceed

Estimated Closing

12/31/2018

Deadlines

Loan Estimate

Deadline to Mail or Deliver Initial LE

12/20/2018

Deadline for Borrower to Receive Revised LE

12/26/2018

Closing Disclosure

Deadline to Mail Initial CD

12/22/2018

Deadline for Borrower to Receive Initial CD

12/27/2018

ORDER INITIAL LOAN ESTIMATE

REQUEST COC / REDISCLOSURE

REQUEST INITIAL CLOSING DISCLOSURE

LIVE CHAT

## Disclosures

This page contains information about disclosures and allows initial disclosures to be issued.

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01-JAN-19



Pipeline

Loan Number:

1000048072

Borrower Name:

ALICE FIRSTIMER

Loan Amount:

\$240,000.00

Property Address:

1209 Nevada, REDLANDS, CA 92374

Loan Type:

Conventional

Credit Score:

760 ?

SAVE

Status and Agents

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Disclosures

E-docs

Conditions (4)

Order Services

Conditions

SUBMIT TO CONDITION REVIEW

REFRESH

Display Condition assigned to: Anyone

Condition #

SEARCH

Open Conditions

<input type="checkbox"/> Status	Condition / Category	Subject	Supporting Documents	Due Date ^ / Assigned To
<input type="checkbox"/> Active RESOLVE	9W6JR9W / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	Requirement: None Association: None <a href="#">upload</a> <a href="#">associate previously uploaded</a>	12/31/2018 Matthew Baker
<input type="checkbox"/> Active RESOLVE	9W6JRC7 / PTD	APPRAISAL ORDERED THROUGH BOLT.	Requirement: <span>Not Satisfied</span> PROPERTY : APPRAISAL Association: None	12/31/2018 Matthew Baker

LIVE CHAT

## Conditions

This page contains conditions.

Pipeline

Loan Number: 1000048072

Borrower Name: ALICE FIRSTIMER

Loan Amount: \$240,000.00

Property Address: 1209 Nevada, REDLANDS, CA 92374

Loan Type: Conventional

Credit Score: 760 ?

SAVE

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Disclosures

E-docs

Conditions (4)

Order Services

Order Services

4506-T

Appraisals

Other Services

ADD ORDER

LIVE CHAT

## Order Services

This page contains additional services, such as ordering the appraisal.



# THANK YOU FOR VIEWING

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