🚧 Mountain West Financial, Inc.

# WHOLESALE BULLETIN

IMPORTANT INFORMATION: PLEASE READ IMMEDIATELY

<u>Guidelines</u>

**Bolt Training** 

Wholesale Website

**Previous Bulletins** 

## 17W-039

#### Attention: Business Development Managers & Mortgage Brokers

May 15, 2017

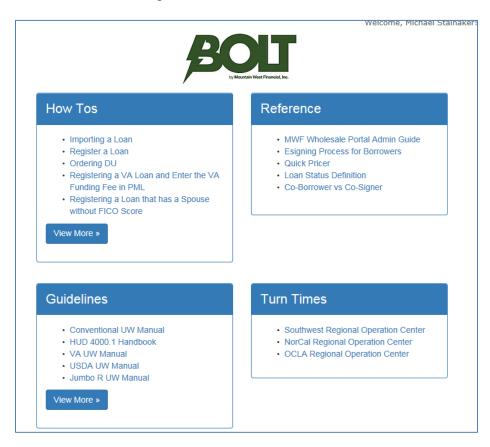
Please take a moment to read the important information contained in this bulletin.

#### Included in this Bulletin: Changes to BOLT

We are excited to announce several enhancements to BOLT designed to streamline workflow and improve the processes. Below are a few of the enhancements:

#### **BOLT Dashboard**

After logging in, the BOLT Dashboard will display. This area contains links to several useful documents, including: How To's, Product Guidelines and other reference materials.



#### New Look

D Pipeline Loan N	lumber: 10000256	373 Borrower Na	ame: Michael TestHSE	El Loan Amount: \$28	0,000.00 Property	Address: TBD, Riversic	le, CA 92508	Loan Typ	e: Conventional	Credit Score: 740
Status and Agents	Applicati	on Information	Closing Costs	Pricing Loan Inform	nation Rate Lock	Disclosures	E-docs	Tasks (1)	Conditions (0)	Order Services
Status Current Status:	Registered	Status Date	2: 3/22/2017	Action: <u>view sta</u> t	tus certificate				Cha	nge Loan Status
		Loan Open 3/22/2017	Registered 3/22/2017	Doc Check			$\rangle\rangle\rangle$	Funded		

The loan interface has been re-designed to provide ease of navigation.

#### **Broker Generated Disclosures**

Brokers can now seamlessly generate disclosures directly from within BOLT.

- 1. Select the **Disclosures** tab on the navigation bar at the top of the frame
- 2. Enter the Estimated Closing date
- 3. Click Order Initial Loan Estimate

Important Loa	an Dates	Deadlines
Application	4/20/2017	Loan Estimate Deadlines
Registration Date:	4/20/2017	Deadline to Mail or Deliver Initial Deadline for Borrower to Receive
Intent to Proceed:		Estimate:
Estimated Closing:	5/29/2017	Order Initial Loan Estimate

#### **Document Management**

The E-docs tab within BOLT has been improved to offer an easy process to upload and view documents directly within the loan file.

	oan Number:	1000022912 Borrower Nar	me: Alice Firstimer	Loan Amoun	t: \$388,000	0.00 Proper	y Address: 123 ;			74 Loan T	ype: Conventional	Credit Score: 710
Status and A	gents	Application Information	Closing Costs	Pricing	Loan Info	ormation	Rate Lock 🛕	Disclosures	E-docs	Tasks (2)	Conditions (2)	Order Service
	Document Upload Submit to Document Check											
	Status	Doc Туре				Application	on Description				Created Date	Pages
view PDF		INCOME - W2				Alice Firstimer					3/28/2017 12:20:12 PM 1	
view PDF		DISCLOSURES - SETTLEMENT STATEMENT/ESTIMATED CD				Alice Firstime	r Use for C	D			1/30/2017 12:37:27	PM 2

#### **Uploading Documents**

The process for uploading documents to the loan file has been streamlined. Many non-useful options have been removed, such as: Fax, barcodes and the cumbersome process of selecting a Doc Type for each uploaded document. Users now simply select the <u>Document</u> Upload button.

	_				Document Upload	Submit to D	ocument Check
	Status	Doc Туре	Application	Description	Created Date		Pages
view PDF		CREDIT - CREDIT REPORT	ALICE FIRSTIMER	Credit Report	4/6/2017 1:54:11 PM		5

This will open a page containing upload links specific to the phase of the loan. As an example, newly submitted loans will display links to upload submission documents as wells as specific items, such the Purchase Contract or Borrower Signed Disclosures.

Confirmation To:	
	Purchase Contract
Borro	ower Signed Disclosures
N	ew Loan Submission

### Additional information and training resources:

BOLT User Guide

BOLT Training Video

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