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

Portal: Broker	•	ß	
Dashboard Broker Pipelines	>	Guidelines	Turn Times
QuickPricer Create New Loan	>	 Affordable Housing Combo Conventional Non-QM 	 Southwest Regional Operation Center NorCal Regional Operation Center
y Profile esources	>	View More »	
	<	Reference	How Tos
		 Lock Policies and Procedures Fees General Forms View More » 	 Importing a Loan Register a Loan Ordering DU View More »

1. Click "Broker Pipelines".

Portal: Broker -	<u>f</u>	
Broker Pipelines 🗸 🗸	Guidelines	Turn Times
Loans nitial Disc Waiting For Signatures	 Affordable Housing Combo Conventional Non-QM 	 Southwest Regional Operation Center NorCal Regional Operation Center
kPricer > te New Loan >	View More »	
y Profile <	Reference	How Tos
	 Lock Policies and Procedures Fees General Forms View More » 	 Importing a Loan Register a Loan Ordering DU View More »

2. Click "Loans".

Portal: Broker	•	Loans			
Dashboard Broker Pipelines Loans Initial Disc Waiting For Signatures	~	Loan Number Search Criteria	Last Name	SSN (Last 4) Status Date Loan Status All Dates	
Configure Pipelines	>		assigned to anyone - onditions Last Name, First Name	Loan Status / Lock Status / Loan Amt Status Date V Lock Exp. Date	Loan Officer /
Create New Loan My Profile	>		Conditions FIRST Name ALICE	Status Date Lock Exp. Date \$240,000 Registered 12/17/2018	Processor LO Matthew Baker
Resources	> <				

To Search Loans In The Pipeline

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

Search Criteria		st Name	SSN (Last 4)	Status Date All Dates	Loan Status	•
SEA	RCH Q CLEAR	SEARCH				
Display most recent	25 - Ioans 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 Condition	FIRSTIMER, ALICE	\$240,000	Registered 12/17/2018		LO Matthew Ba

To Filter Loans In The Pipeline

Portal: Broker

Broker Pipelines

Initial Disc Waiting Fo

Create New Loan

QuickPricer

My Profile

Resources

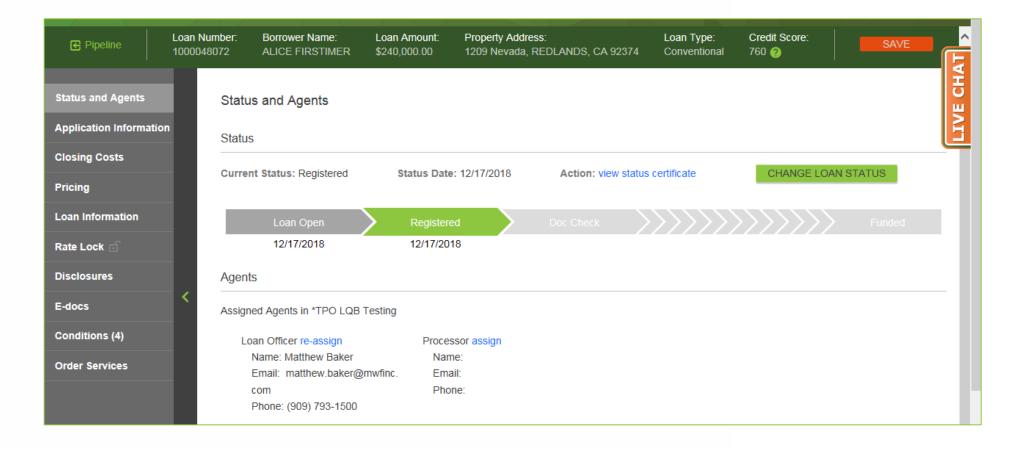
Dashboard

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

Accessing Loans In Broker Pipelines

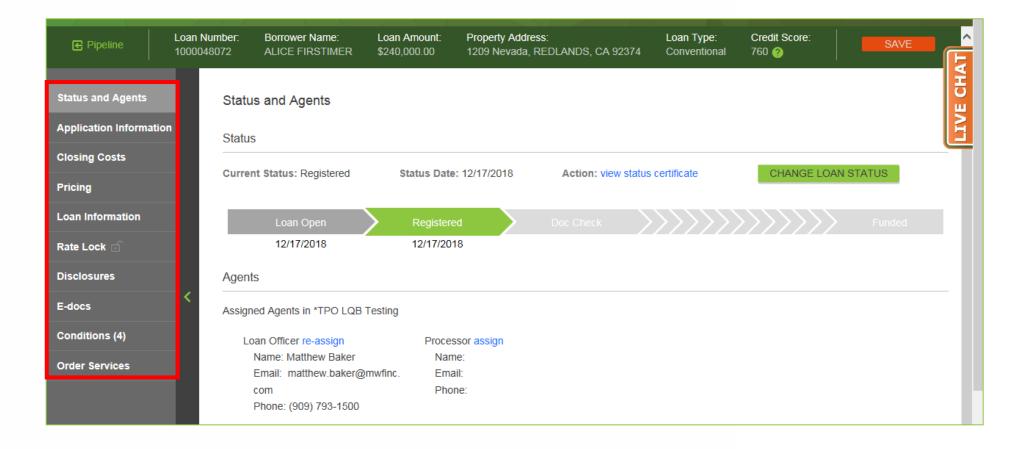
Portal: Broker	•	Loans							L
Dashboard Broker Pipelines Loans	×	Search Criteria	Loan Number SEARCH Q	Last N CLEAR SE		SSN (Last 4)	Status Date All Dates	Loan Status ✓ <any></any>	•
Initial Disc Waiting For Signature Configure Pipelines QuickPricer	>	Display most Loan N		loans assigned to Conditions	anyone ▼ Last Name, First Name	Loan Amt	Loan Status / Status Date v	Lock Status / Lock Exp. Date	Loan Officer / Processor
Create New Loan My Profile	> <	100004	18072	4 Conditions	FIRSTIMER, ALICE	\$240,000	Degistered		LO Matthew Baker
Resources	>								

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



2. The Loan window will appear.

Accessing Pages Within A Loan

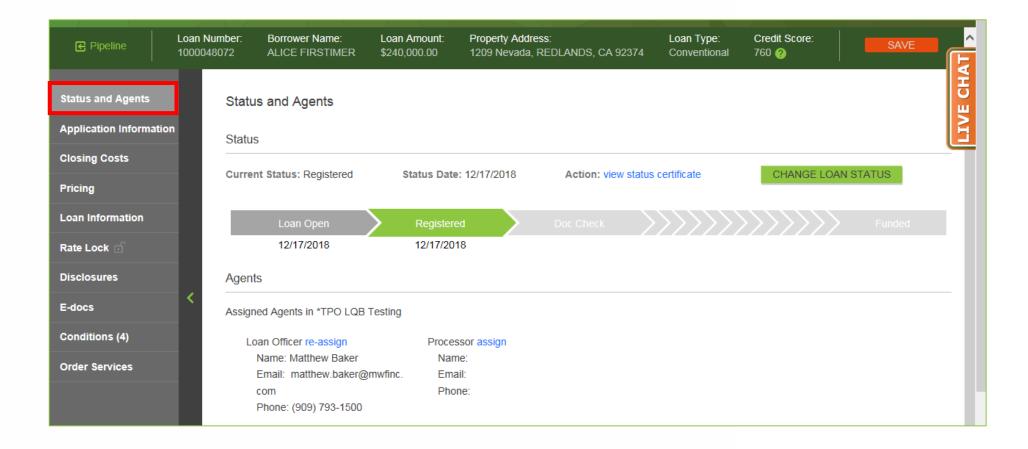


1. Click on the page that needs to be open.



Main Pages Within A Loan

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



Status And Agents

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

E Pipeline	Loan Number: 1000048072	Borrower Name: ALICE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REDLANDS, CA	Loan Type: A 92374 Conventional	Credit Score: 760 🕐	SAVE
Status and Agents	Appli	ication Information			IMPORT FNM	3.2 FILE ADD	NEW APPLICATION
Application Information			/IER V	1002 Barrey, Dogo 1 Dogo		4	
Closing Costs	Applic	cant(s): ALICE FIRSTIN		1003 Page: Page 1 Page	2 Page 3 Page	4	_
Pricing	ПΤ	he income or assets of a	person other than the	e "Borrower" will be used [The income or assets of	f the Borrower's spous	e will not be used
Loan Information	~	I. TYPE OF MORTGAGE	AND TERMS OF LO	DAN			
Rate Lock 🕤		Mortgage Applied for:		Agency Case Number		Lender Case Number	
Disclosures		Conventional -				1000023324	
E-docs	<	Purchase Price	Down Payment %	Equity / Down Pmt	Loan Amt	Amort. Type	
Conditions (4)		\$300,000.00	20.000%	\$60,000.00	\$240,000.00	Fixed Rate -	
Order Services		Upfront MIP / FF \$0.00	Total Loan Amt \$240,000.00	Note Rate 6.250%	Qualifying Rate 6.250%		
		Term	Due	Monthly Payment	Other Print Desc.		
		360	360	\$1,477.72			

Application Information

This page contains the 1003.

C Pipeline	Loan Number: 1000048072	Borrower Name: ALICE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REDLANDS, (o an Type : onventional	Credit Score: 760 💡	S	AVE
Status and Agents	Closi	ng Costs							
Application Information			i Ot-		Nee Deere	D		4-	
Closing Costs	Bor	rower-Responsible Cl	osing Costs	Non-P&I Housing Expenses	NON BOLLO	wer-Respo	nsible Closing Cos	SIS	
Pricing	A - Or	igination Charges							
Loan Information		Description/Memo	Paid to		Amount	Paid by	Payable	Date paid	
Rate Lock 🕤	details		Lender	· •		borr pd 👻	-	12/31/2018	
Disclosures	details	-	Lender		00.02	borr pd 👻	at closing	12/31/2018	
E-docs	<pre></pre>	Louir origination rec							
Conditions (4)	details	Underwriting fee	Lender		\$995.00	borr pd 👻	at closing -	12/31/2018	
Order Services	•								
	B - Se	ervices You Cannot Sł	nop For						

Closing Costs

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

Ge Pipeline		Borrower Name: ALICE FIRSTIMER	Loan An \$240,00			Address: vada, REDLAND	9S, CA 92374	Loan Type: Conventional	Credit Score 760 🥎	
Status and Agents Application Information	Pricing									LIVE CHAT
Closing Costs	Run Scenario in DO	Submit to DU (Seam		Results Filt	0.P					
Pricing	Run Scenario in DU	Submit to LPA (Sean		Term	er		Amortization Type		Product Type	
Loan Information	Submit to LPA			☐ 10 Ye		☐ 25 Year ✓ 30 Year	Fixed 3 Year ARM	7 Year ARM 10 Year ARM	✓ Conventional ✓ HomeReady	FH/
Rate Lock 📄	No Pinned	Results to Compare		20 Ye	ar	Other	5 Year ARM	Other	Home Possible	
Disclosures	Horizon of borrower inter	rest: 60 months (explain	1)	P&I	Түре	✓ I/O				
E-docs	Application #1 Property 8	& Loan Info		Advanced	Filter Opt	tions				_
Conditions (4)	Street Address 1209) Nevada	-	Alert Messa • Credit has no	-	dered for Applicatio	on #1. Please order cre	dit for more accura	te results.	
Order Services	Zip Code 9237 County San City RED	74 State CA 🔽 Bernardino 🔽								
		res <u>explain</u> nary Residence								

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 .

E Pipeline	Loan Number: 1000048072	Borrower Name: ALICE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REDLANDS, C	Loan Type CA 92374 Conventio		SAVE
Status and Agents	Loan	Information					IVE CHAT
Application Information Closing Costs		Loan Terms FNI	MA Addendum	FHLMC Addendum			5
Pricing	Loan	Information					
Loan Information	Loa	n Program		Registered Loan Program			
Rate Lock 🗊		30 - CONF FIXED 30YR		CF30 - CONF FIXED 30YF	2	view registration certificat	e
Disclosures		n Position st 💌		al Loan Amount 10,000.00	Interest Rate 6.250%		Term/Due (months) 360 / 360
E-docs	< Amo	ortization Type	Day	s in Year	Qualifying Rate		Interest Only Months
Conditions (4)	Fix	xed -	360		6.250%		0 months
Order Services							

Loan Information

This page contains general loan information.

E Pipeline	Loan Number: 1000048072	Borrower Name: ALICE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REE)LAN	NDS, CA 92374	Loan Type: Convention		Credit Score: 760 ?	SAVE	
Status and Agents	Rate	Lock									Г СНАТ
Application Information	ا				7 [LIVE
Closing Costs		n Program				Loan Status					
	CF	30 - CONF FIXED 30YR				Registered					
Pricing	Reg	jistered Loan Program				Lock Status					
Loan Information	CF	30 - CONF FIXED 30YR				Not Locked					
Bete Laste -C	Reg	jistered Date				Rate Locked Dat	te Loc	k Peri	bd		
Rate Lock 🖻	12/	(17/2018					30	d	ays		
Disclosures	Reg	jistration Comments				Rate Lock Comm	nents				
E-docs	<										
						Lock Expiration [Date Loc	k Expi	ration Comments		
Conditions (4)	Orio	ginator Compensation Info	mation view lende	er comp plan details							
Order Services		,									
	Amo	ount Net	Points	Paid By							
	\$4,	800.00 2.0	00%	Lender -							

Rate Lock

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

E 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		osures						
Closing Costs	Imp	ortant Loan Dates						
Pricing		ication Date	Registratio		Intent to Proce	eed	Estimated Closing 12/31/2018	a
Loan Information								
Rate Lock 🗊	Dea	adlines						
Disclosures	Loar	n Estimate			Closing Discl	osure		
E-docs		dline to Mail or Deliver Ini			Deadline to Ma			
Conditions (4)		20/2018 👘 🥝			12/22/2018	orrower to Receive		
Order Services		26/2018			12/27/2018			
	ORD	DER INITIAL LOAN ESTI	MATE REQUES	ST COC / REDISCLOSURE	REQUEST	INITIAL CLOSING	G DISCLOSURE	

Disclosures

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

E Pipeline	Loan Numbe 1000048072		rower Name: CE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REDLAI	NDS, CA 92374	Loan Type: Conventional	Credit Score 760 ?		
Status and Agents	E-	docs								E CHAT
Application Information						DOCU	MENT UPLOAD	SUBMIT	TO DOCUMENT	
Closing Costs										
Pricing			Doc Туре	/	Application	Description		1	Last Modified Date	Pages
Loan Information	v	/iew PDF	ESCROW - PURC	HASE	ALICE FIRSTIMER	Upload Pur Order.	chase Contract for A		12/17/2018 3:12:04 PM	1
Rate Lock 🕤			CONTRACT			Oldel.			5.12.04 PW	
Disclosures										
E-docs	<									
Conditions (4)										
Order Services										

E-Docs

This page contains documents in the loan file and allows documents to be uploaded.

🖌 Pineline	.oan Number: 1000048072	Borrower Name: ALICE FIRSTIMER	Loan Amount: \$240,000.00	Property Address: 1209 Nevada, REDLANDS, CA 92374	Loan Type: Credit Score: Conventional 760 ?	SAVE
Status and Agents Application Information Closing Costs		ditions FRESH Display Co	ondition assigned to	o: Anyone ►	SUBMIT TO COM	NDITION REVIEW
Pricing Loan Information	Oper	Status	ondition / S	Subject	Supporting Documents	Due Date A /
Rate Lock ⊡ Disclosures	< -	Active 9V	V6JR9W / A	ANTI-STEERING SIGNED BY ALL BORROWERS.	Requirement: None Association: None upload	12/31/2018 Matthew Baker
E-docs Conditions (4) Order Services	12				CO associate previously uploaded Requirement: O Not Satisfied PROPERTY : APPRAISAL	
			9W6JRC7 / APPRAISAL ORDERED THROUGH BOLT. PTD		Association: None	12/31/2018 Matthew Baker

Conditions

This page contains conditions.

Gereine	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	Orde	r Services					LIVE CHAT
Application Information							LIV
Closing Costs		4506-T	Appraisals	Other Services			
Pricing	ADI	OORDER					
Loan Information							
Rate Lock 💼							
Disclosures							
E-docs	<						
Conditions (4)							
Order Services							

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