



INTEGRATION GUIDE



HOW TO USE THE LOAN LOGICS INTEGRATION

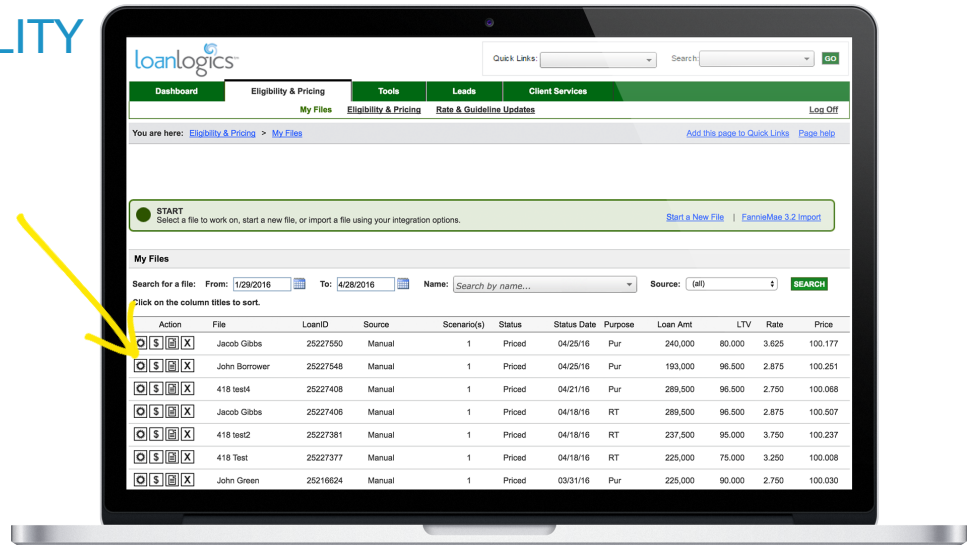
1

On the **ELIGIBILITY & PRICING** tab,

CLICK ON



button.



2

CHOOSE your options under **INVESTOR SELECTION** and **PRODUCT SELECTION**.

CLICK **GO PRICE**.

Pricing Form

FILE: John Borrower
Borrowers (1): [view](#) | [add / edit](#) | [mailing address](#)

SCENARIO NAME: MMI Test | [view details](#) | [display](#)

SCENARIO: 1 | LOANID: 25227548 | SOURCE: Manual

Financing Structure

Loan Position: First
Loan Purpose: Purchase
Product Category: Conventional & Alt-A
Purchase Price: \$ 200,000
Down Payment: \$ 7,000.00 3.500 %
1st Lien Amt: \$ 193,000 LTV: 96.500 %

Pricing Options

Doc Type: Full
AU Decision: DU Approve
Borrower Paid Points:
DTI:
Reserves: n/a
Waive All Escrows: ☐
Waive Insurance only: ☐
HomeReady/My Community: ☐
Home Possible: ☐
Home Path: ☐
MI Options:
No MI: ☐
Lender Paid MI: ☐

Property Information

Occupancy: Primary Residence
Property Type: 1 Family
Zip Code: 91203
Property State: California
Property County: Los Angeles
Rural/Unique Property: ☐
USDA: ☐

Borrower & Credit

Borrower Type: US Citizen
Self Employed: ☐
First Time Buyer: ☐
710

Investor Selection [select](#)
Available: 3 Selected: 3

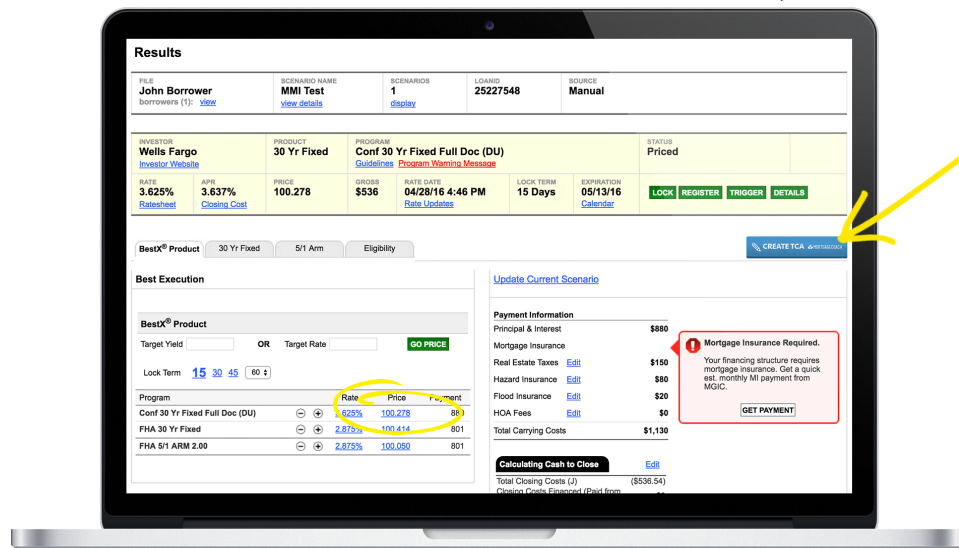
Product Selection [select](#)
Available: 10 Selected: 0

SAVE **GO PRICE**

3

CLICK ON the price of one of your products under the **PROGRAM** list.

Then **CLICK ON**



4

In the popup, **NAME** your products, **CHOOSE** fee templates as available, and **CLICK ON** **UPDATE**.

Export To MortgageCoach

Either Export the current loan scenario to a new MortgageCoach slot or Update an existing slot. MortgageCoach links and email are available on the MortgageCoach tab of the Details screen.

Product Name	Fee Template	
Product 1: FHA 5/1 ARM	M FHA 30 Purch	UPDATE
Product 2: Conv 30	Conv 30 purcha	UPDATE
Product 3: FHA 30 Fixed	FHA 30 purchase	UPDATE
Product 4:	(select)	EXPORT

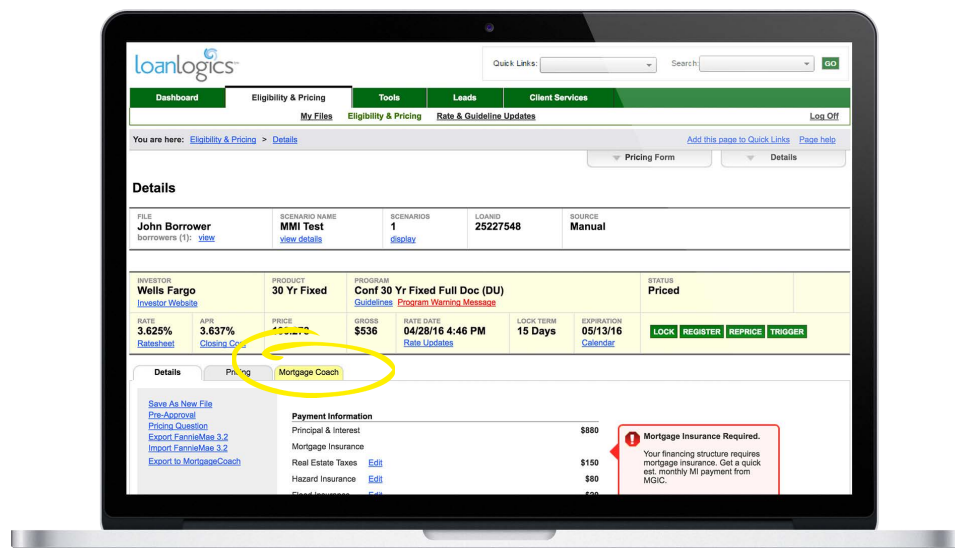
5

Then, in the yellow bar near the top of the window, **CLICK ON** **DETAILS**.

INVESTOR Wells Fargo Investor Website		PRODUCT 30 Yr Fixed	PROGRAM Conf 30 Yr Fixed Full Doc (DU) Guidelines Program Warning Message				STATUS Priced	
RATE 3.625% Ratesheet	APR 3.637% Closing Cost	PRICE 100.278	GROSS \$536	RATE DATE 04/28/16 4:46 PM Rate Updates	LOCK TERM 15 Days	EXPIRATION 05/13/16 Calendar	LOCK REGISTER TRIGGER DETAILS	

6

Now, the **MORTGAGE COACH** tab will appear.
CLICK ON the **MORTGAGE COACH** tab.



7

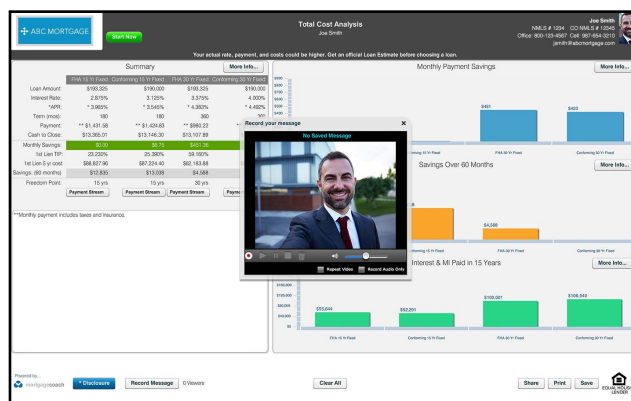
From there, you will see 4 buttons:



To view your report, click on **LIVE TCA** and your browser will open your Mortgage Coach presentation.

To add a video or audio recording, click on **ADD NARRATION**. In the resulting window, **CLICK ON RECORD MESSAGE** on the bottom left of the screen.

RECORD in the pop-up and then close the pop-up.



SHARE your report by clicking on **SEND TCA** or **TEXT TCA**.