The integration between Mortgage Coach and Polly feeds real-time data from Polly’s cloud-native Product and Pricing Engine (PPE) into Mortgage Coach Total Cost Analysis (TCA) presentations, enabling highly accurate, side-by-side home loan comparisons that give borrowers the confidence to move forward with the financial products that best meet their needs.

Login to Your Account
Enter your username and password to access the dashboard.

Select Pricing Engine from the menu on the dashboard.

Create a Mortgage Coach Total Cost Analysis (TCA) presentation from the Loan Pipeline or Loan Scenarios options.

Loan Pipeline
Use the Loan Pipeline section to generate Mortgage Coach TCAs for your current and existing borrowers. Information previously entered for the selected borrower(s), such as property details, name, contact details, etc., will pre-populate, reducing your keystrokes when preparing the loan scenarios.

Select Loan Pipeline from the left navigation bar.

Click the Loan ID hyperlink for the desired borrower.
Expand the Loan Scenario section by using the downward arrow.

Complete the required fields in orange. Update any additional fields as needed before collapsing this area.

Click the upward arrow to collapse the screen.

Scroll down to Search Criteria on the left side navigation bar, and select the following options that apply to the loan scenario:

- Lock Period
- Loan Type
- Fixed Programs
- ARM Programs

After making the appropriate selections, click Get Pricing to display the real-time pricing results.

Use the right scroll bar to review all eligible products for the transaction.

To proceed, use the checkbox column to select up to 4 loan scenarios, and click the Mortgage Coach button to generate a Mortgage Coach TCA.
Loan Scenarios

Use the Loan Scenario section to generate Mortgage Coach TCAs for prospective borrowers or leads. When creating new loan scenarios, there is no pre-populated data displayed.

Expand the Loan Scenario section by using the downward arrow.

Complete the required fields in orange before collapsing this area. Click the upward arrow to collapse the screen.

Scroll down to Search Criteria and select the options that apply to the loan scenario.

Click the Get Pricing button in the lower right corner of the Loan Scenario section.

A separate Total Cost Analysis browser window will open, and you can choose to add a personalized video and/or audio message to the client.

To make additional edits to the Total Cost Analysis, log into the Advice Engine. Navigate to the top left corner menu and select Originator Login to open the Advice Engine login screen.
Advice Engine Dashboard

The Polly generated TCAs will display under the automated tab. Identify the source from the icons on the left. Click on the borrower record to add, change, or update information as needed, such as name and contact information, or apply fees and costs to the presentations.