

# Welcome to the **bntouch** & MORTGAGECOACH® Integration!

We are proud to reintroduce our integrated relationship with BNTouch. The BNTouch/Mortgage Coach integration reduces and eliminates data entry points when creating an on-demand interactive presentation within the Mortgage Coach Advice Engine.

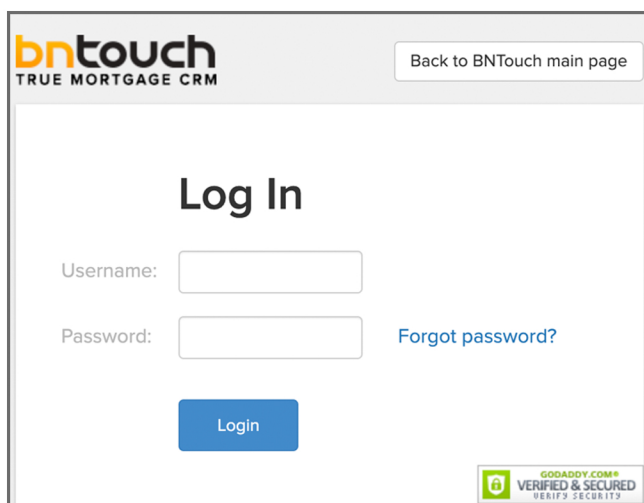
Additional benefits of the integration include the following:

- Reduce data entry by passing the borrower contact information and proposed loan options directly from the BNTouch CRM Solution to Mortgage Coach.
- TCAs created in BNTouch are stored as links in the borrower record, allowing Loan Originators to capture past presentations created for each borrower.
- Take advantage of the power of BNTouch by triggering an email to borrowers directly within the CRM solution.
- Making edits or adding loan options in the Mortgage Coach Advice Engine will update the existing link shown within BNTouch so that presentations will dynamically update.
- Loan Originators can access the Preview link to do real-time highlighting when they want to walk borrowers through a live presentation.

## How to use the BNTouch and Mortgage Coach Integration

1

**LOGIN** to your BNTouch CRM Solution.

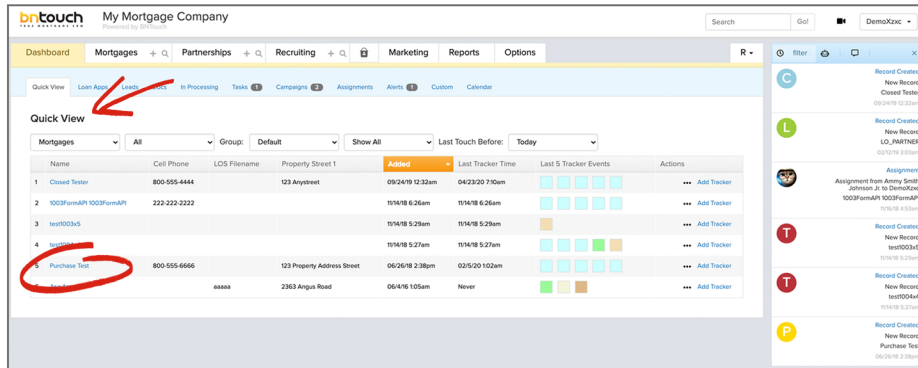


The screenshot shows the BNTouch login interface. At the top left is the logo for "bntouch TRUE MORTGAGE CRM". To the right is a link that says "Back to BNTouch main page". The main heading is "Log In". Below this are two input fields: "Username:" and "Password:". To the right of the password field is a link that says "Forgot password?". Below the input fields is a blue button labeled "Login". At the bottom right corner of the page is a security badge from "GOADDY.COM" that says "VERIFIED & SECURED VERIFY SECURITY".

2

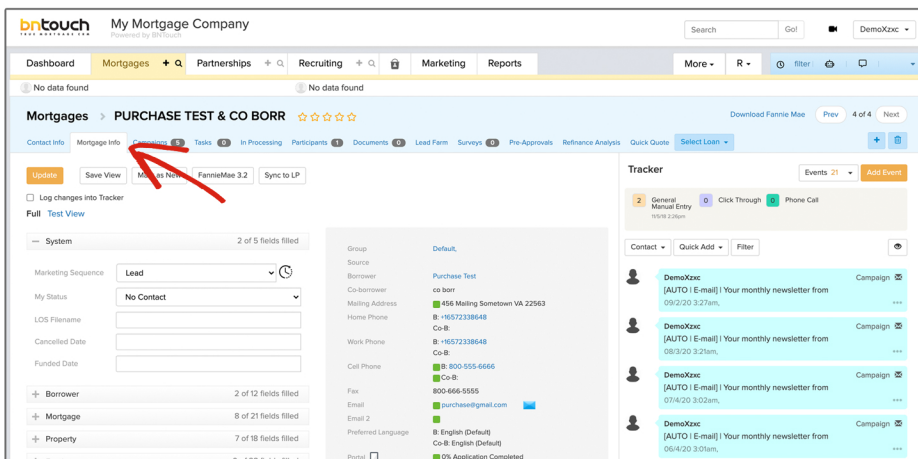
From the dashboard, select a prospect/borrower record under **QUICK VIEW**.

**CLICK** on the desired prospect/borrower record.



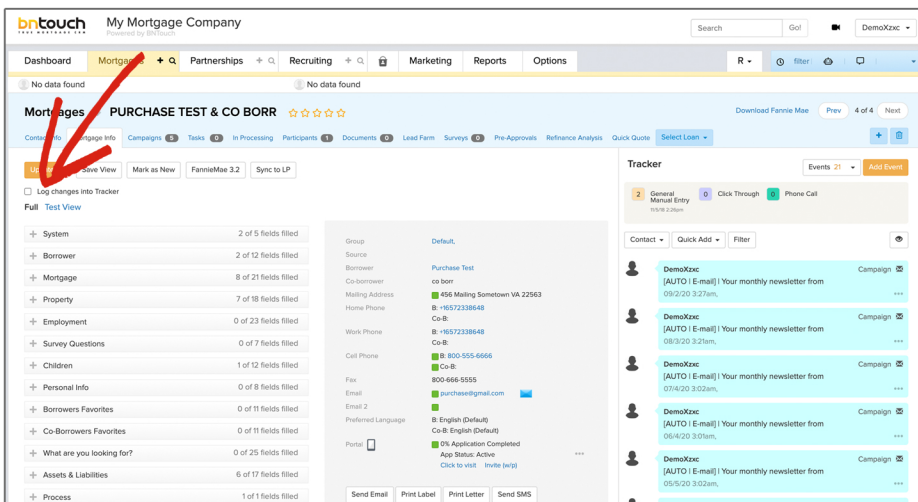
3

The system will route you to the **MORTGAGE INFORMATION** tab.



4

**INSERT** data on the **LEFT-HAND SIDE** of the screen to successfully create a Total Cost Analysis (TCA).



4

Cont.

- Borrower Information
- Mortgage Information (Purchase Price, Appraised Value & New Loan Parameters)
- Property Information (Loan Purpose, Loan Amount, Loan Type, Rate & Term)
- Assets & Liabilities (Assets, Impounds & Rental Payments)

**CLICK SAVE.**

**Borrower** 2 of 12 fields filled

Extra Text 2

Credit Self Rating **-select-**

Credit Score (Middle)

Combined Monthly Income \$ **10,000**

Combined Monthly Obligations \$

Employment Borrower **-select-**

Employment Co-borrower **-select-**

Documentation **-select-**

Bankruptcy **None**

Bankruptcy Filed

Bankruptcy Discharged

Re-established Credit **-select-**

**Mortgage** 8 of 21 fields filled

Loan Purpose **Purchase**

Type **FHA**

Loan Amount \$ **315,000**

Loan Program

Rate % **4.75**

Rate Lock Expires (date)

Loan Terms **Fixed**

ARM Description

ARM Index %

ARM Margin %

Fixed Period (Months) **360**

Amortization Type

**Property** 7 of 18 fields filled

Property Type **-select-**

Sales Price \$ **400,000**

Appraised Value \$ **400,000**

Down Payment \$ **40,000**

Monthly Payment \$

Proposed 1st Mortgage Pyt \$

Ins. Pyt Req for 1 Yr

Proposed Total Housing Exp \$

Actual Total Housing Exp \$

First Payment Date

Property Street 1 **123 Property Address Street**

Property Street 2

**Assets & Liabilities** 6 of 17 fields filled

Checking \$ **2,000**

Savings \$ **15,000**

Life Ins \$

Stocks \$

Bonds \$

Mutual Funds \$

Borrower Retirement \$

Co-Borrower Retirement \$

Present Rent \$ **2,000**

Present Monthly Mort Payment \$

Includes T & I **-select-**

Present Other Fin \$

5

**VIEW** the **MORTGAGE COACH INTEGRATION** in the center of the Mortgage Information screen.

**Mortgage Coach Integration (Login to EDGE)**

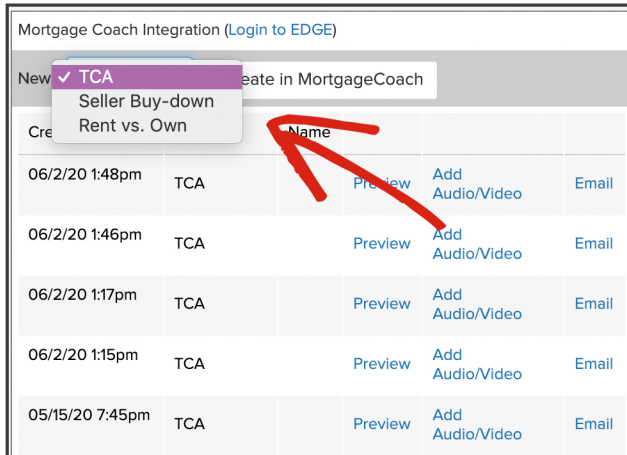
**Create in MortgageCoach**

Created	Type	Name	Preview	Add Audio/Video	Email
06/2/20 1:48pm	TCA		Preview	Add Audio/Video	Email
06/2/20 1:46pm	TCA		Preview	Add Audio/Video	Email
06/2/20 1:17pm	TCA		Preview	Add Audio/Video	Email
06/2/20 1:15pm	TCA		Preview	Add Audio/Video	Email
05/15/20 7:45pm	TCA		Preview	Add Audio/Video	Email

6

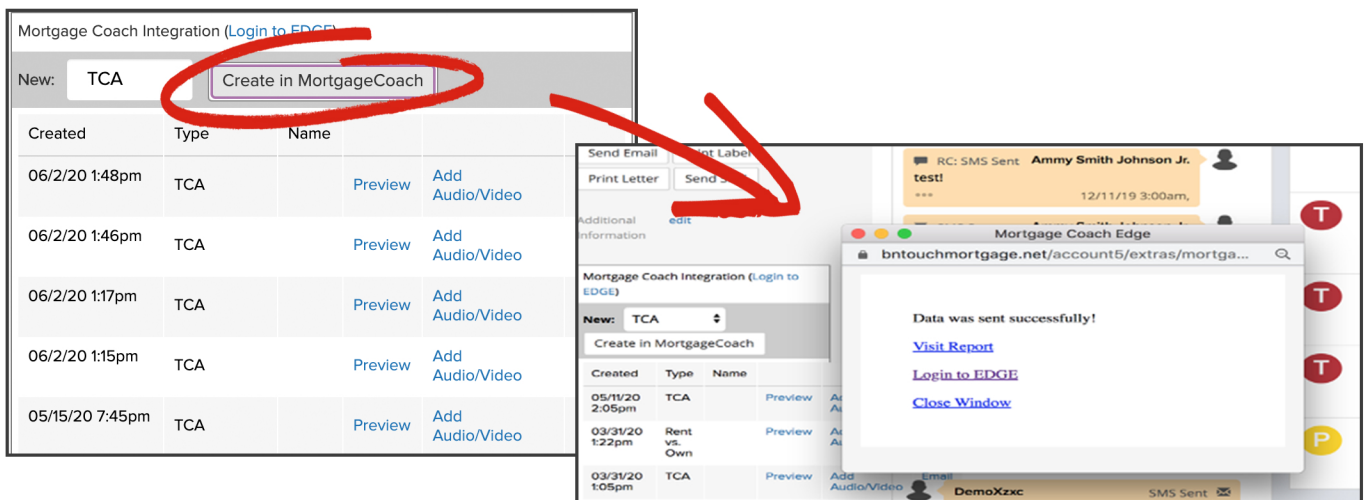
**SELECT** one of the options to create the following reports:

- **Total Cost Analysis (TCA)**
- **Seller Buy-Down**
- **Rent vs. Own**



7

**CLICK Create in Mortgage Coach** once the report type has been selected.



The **pop-up window** indicator confirms the integrated record successfully passed to the **Mortgage Coach Advice Engine**. Now, LOs can open the Mortgage Coach report, log in to the Advice Engine, or close the window.

8

**PREVIEW** and **ADD VIDEO** to the Mortgage Coach TCAs.

Mortgage Coach Integration (Login to EDGE)

New: TCA ▼ Create in MortgageCoach

Created	Type	Name	Preview	Add Audio/Video
06/2/20 1:48pm	TCA		Preview	Add Audio/Video
06/2/20 1:46pm	TCA		Preview	Add Audio/Video
06/2/20 1:17pm	TCA		Preview	Add Audio/Video
06/2/20 1:15pm	TCA		Preview	Add Audio/Video

REPORT FOR: PURCHASE TEST PROPERTY: 123 PROPERTY ADDRESS STREET, PROPERTY TOWN, CA, 90045

### Total Cost Analysis

Hi Purchase! Welcome to your personal Total Cost Analysis for a home loan. Here you can compare our different loan products from a short and long term perspective. Thank you for letting us be your partner in your mortgage experience. Please let us know if you need help in any way.

**Summary** More Info

	BNTouch Product 1
<b>Purchase Price:</b>	\$400,000
<b>Loan Amount:</b>	\$315,000
<b>Interest Rate:</b>	4.750%
<b>APR:</b>	*4.750%
<b>Term (mos):</b>	360
<b>Payment:</b>	**\$1,643.19
<b>Cash To Close:</b>	\$85,000.00

How would you like to record your video?

In Mobile App

In Web Browser

Audio Only

MORTGAGECOACH.

9

**LOGIN** to the Mortgage Coach Advice Engine to edit the presentation and add additional loan options.

**CLICK** the **AUTOMATED** tab on the home screen to locate the BNTouch record.

MORTGAGECOACH. CLIENT PARTNER SETTINGS HELP SIGN OUT

GOOD MORNING, DEMO!

Badges News Videos (5 New)

CLIENTS

NEW CLIENT SEARCH ALL

Recent Clients Recent Views **Automated** 7

Source	First Name	Last Name	Presentation	Email	Date Created
b	Purchase	Test		purchase@gmail.com	6/2/2020 10:46:07 AM
b	Purchase	Test		purchase@gmail.com	6/2/2020 10:44:51 AM
b	Purchase	Test		purchase@gmail.com	6/2/2020 10:15:10 AM
b	Purchase	Test		purchase@gmail.com	6/2/2020 10:13:48 AM
b	Closed	Tester		closedloan@gmail.com	6/2/2020 10:10:25 AM
b	Closed	Tester		closedloan@gmail.com	6/2/2020 10:07:49 AM
b	Closed	Tester		closedloan@gmail.com	6/2/2020 10:03:48 AM
b	Closed	Tester		closedloan@gmail.com	6/2/2020 10:01:12 AM
b	Purchase	Test		purchase@gmail.com	5/15/2020 4:43:26 PM
b	Purchase	Test		purchase@gmail.com	5/15/2020 11:01:18 AM
b	Purchase	Test		purchase@gmail.com	5/11/2020 11:10:05 AM
b	Purchase	Test		purchase@gmail.com	5/11/2020 11:04:06 AM

NOTIFICATIONS

- Making Mortgage Insurance Advice Your Competitive Advantage With Keith Collins
- Perfect Pre-Approval Experience
- Real-Time Highlighting With MC Live

Strategy Templates

CLIENT GOALS

GOAL ACTUAL

Feedback? Legacy TOOLTIPS Help

# 10

VIEW a BNTouch sample Total Cost Analysis.

