Welcome to the bntouch & Mortgage Coach 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

LOGIN to your BNTouch CRM Solution.
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).
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.**

**VIEW the MORTGAGE COACH INTEGRATION**
in the center of the Mortgage Information screen.
**SELECT** one of the options to create the following reports:
- Total Cost Analysis (TCA)
- Seller Buy-Down
- Rent vs. Own

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

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.
VIEW a BNTouch sample Total Cost Analysis.