HOW TO USE THE OPTIMAL BLUE INTEGRATION WITH MORTGAGE COACH

1. **START** by pushing loan data from your LOS, creating a new search, or working on a record in your pipeline.

2. **SELECT** your search criteria and then click **SUBMIT**. Or upload from your LOS.
In the COACH column, CHECK the boxes of the loans you want to compare.

You can choose up to four loans. Click on SHOW for details and more loan options to compare.

CLICK the button at the top of the page to generate your report.
On the resulting pop-up, **CLICK** the button to send the queued loans over to a TCA.

Use the **FRIENDLY NAME FIELD** to edit the names that will be used on your TCA. **CLICK** the **REMOVE** link beneath each item to remove the option from the queue.

If you have more than 4 options in the queue, you will see a message that asks you to remove options.

**Your browser will open your Mortgage Coach presentation in a new window or tab.**
TO VIEW & EDIT YOUR PRESENTATION, login to your Mortgage Coach account. 

CLICK the AUTOMATED tab.

DOUBLE-CLICK your client name to add and edit more information.

Once you click on your client report from Optimal Blue under the Automated Tab, you can find the client report in the RECENT CLIENTS tab also.
TO ADD A VIDEO, CLICK the RECORD VIDEO button in your client report, in the menu on the right.

On the resulting page, CLICK how you would like to record your video.

IN MOBILE APP:
Open Mortgage Coach on your phone and start recording.

IN WEB BROWSER:
Begin recording with your computer camera.
10 **TO HIGHLIGHT IN REAL-TIME,** click **PREVIEW & HIGHLIGHT** in the Toolbox on the right hand panel in your client record.

Click on different fields you would like to highlight. As you do so, your client will see the same happening on their device.

Click on **CLEAR ALL** at the top of the report to clear your highlights.

11 **TO SHARE your report,** click the **SHARE** button at the top.

Grab the Mortgage Coach link from the pop-up box and share the link with your client. Or click the icons on the pop-up to share via Facebook, Twitter, or email.
GET PRICING MANUAL
How to Use the Optimal Blue
Get Pricing Functionality on Mobile

1. **CLICK** at the top left corner of the home screen.

2. **SIGN IN** and then **CLICK ON CLIENTS** or **PARTNERS**.

3. **CLICK NEW** at the top right corner or **SELECT** an existing report.
If you clicked on **NEW**: on the pop-up, **CLICK CREATE CLIENT.**
This will create a new client and allow you to fill in the client information.

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**FILL OUT** the fields as you move through the tabs. **CLICK NEXT** at the bottom of the screen to move to the next tab or **SWIPE** left or right.
At any time, you can scroll through the tabs and click on any tab.
Under the **PRODUCTS** tab, **CLICK** **ADD PRODUCT** or **CHOOSE** from the list of products.

**COMPLETE** your loan information. **FILL IN** the purchase price, loan amount, term, and loan type.

At the bottom of the screen, **CLICK** **GET PRICING BY OPTIMAL BLUE.**

**CONFIRM** your loan and pricing criteria. **CHOOSE** a state and county to proceed. **CLICK** **NEXT** at the bottom of the screen to get your pricing results.
9. **HIGHLIGHT** your loan option. **CLICK SELECT.** Your rate and discount/rebate will be added to your loan.

10. On the last tab, **CLICK NEXT.** A pop-up will then appear. **SELECT:**
- **VIEW REPORT** to view the report on your phone.
- **VIDEO** to add a video.
- **LIVE REPORTING** to highlight and move through your report in real-time as your clients follow on their mobile devices.

11. **CLICK ON** at the top right corner of the pop-up to share your report. **CHOOSE** how you would like to share your report.
How to use the Optimal Blue Get Pricing Import Functionality

1. To access the Optimal Blue Get Pricing feature in Mortgage Coach, **CLICK ON NEW CLIENT** or **CLICK ON RECENT CLIENTS**.

2. **CLICK ON** a loan product on the left menu bar.
SELECT the desired product from UPFRONT PREMIUM dropdown to ensure you receive accurate pricing for those products.

If you are not including a product that is FHA/VA/USDA, then move to Step Four.

ENTER the PURCHASE PRICE, DOWN PAYMENT, DESIRED INTEREST RATE, and TERMS IN MONTHS if you want to search for a desired term.
5. CLICK **GET PRICING.**

6. Note the **OPTIMAL BLUE PRODUCT SELECTION** message box display. **COMPLETE** or **EDIT** the required information. **CLICK NEXT** to request Optimal Blue Pricing.
**SELECT** a product by clicking in the row of the desired product, then **CLICK OK. CLICK** any column heading to sort the column up or down.

If a Fixed product is selected, then the system navigates to the Product Closing Cost screen. **CLICK CLOSING COST DETAIL**, if you have previously created Fee Templates. If you haven’t created Fee Templates, then enter the closing costs manually.
If a ARM product is selected from the Optimal Blue Product Search, then the system navigates to the ARM detail screen. Verify or edit the ARM details as needed. Click the right arrow to advance to the Closing Cost Detail Screen.
SELECT the appropriate Template from Apply from Template drop down. CLICK APPLY TO LOAN.

Upon Apply to Loan, return to the Closing Cost screen and should note that the fee detail has auto-populated for the product. CLICK NEXT at the bottom of the page proceed.
11 ENTER MONTHLY COSTS.

12 CLICK PRESENTATION. CLICK PREVIEW & HIGHLIGHT.
13 VIEW the ANALYSIS complete with the auto-populated, real-time pricing from Optimal Blue.