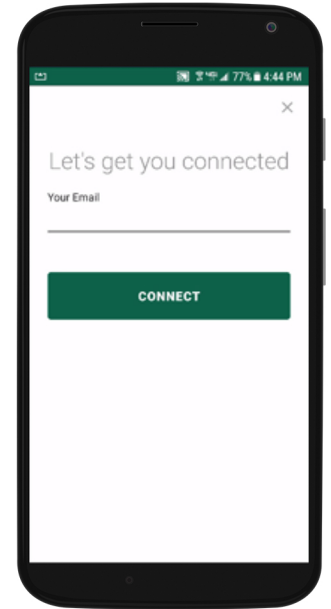# How the SimpleNexus and Mortgage Coach Integration Works

1 After your borrower/prospect clicks the link you provided, a **new record is immediately created** in Mortgage Coach with as much information as the borrower enters.

The record, at a minimum, will always have at least a full name and email address, but can contain more information if the borrower enters it.

2 Once your borrower submits the application, **they will see a new button in your app called "Mortgage Coach."**

This button will lead to the Total Cost Analysis that was generated on your behalf and will have your contact information, disclosures, and branding, as well as the client contact information, property value, and down payment % (if entered).

You will **receive a notification** on your SimpleNexus app when your borrower completes the application.
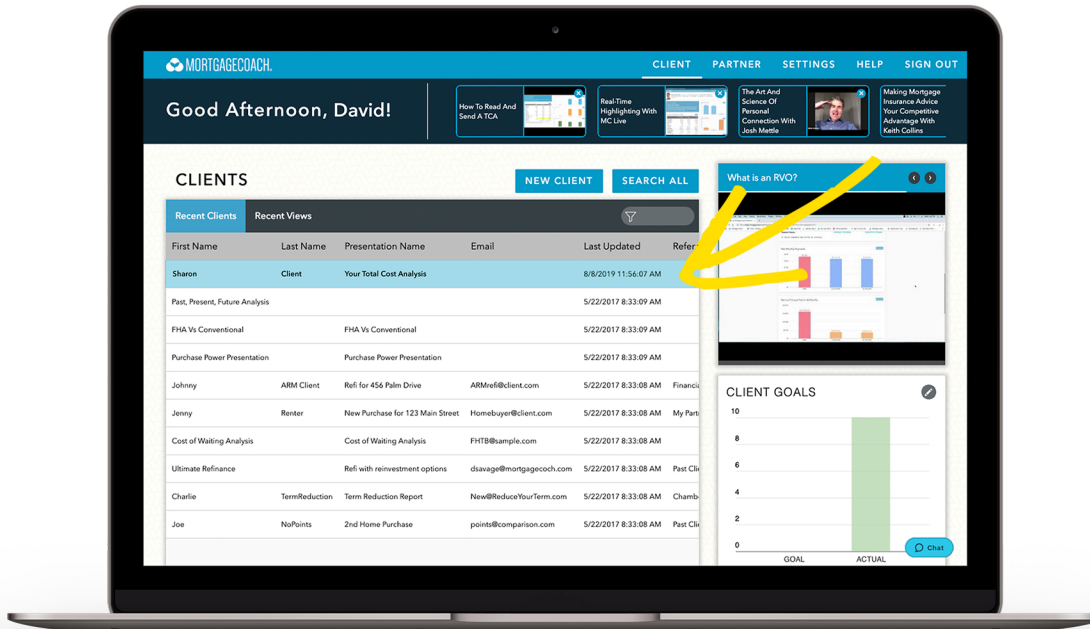
You will also recieve an email and a notification within your Mortgage Coach app when your borrower opens their Mortgage Coach Total Cost Analysis.
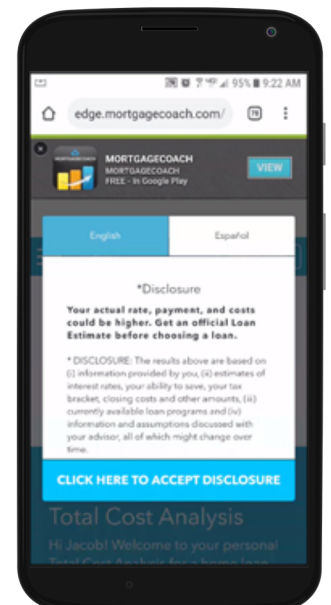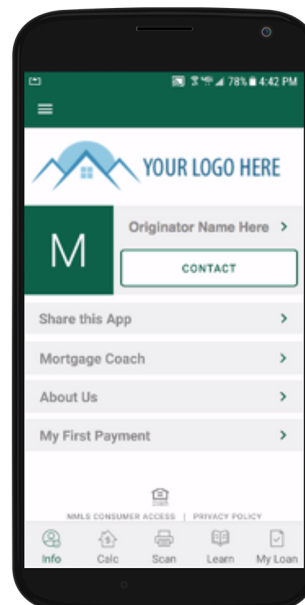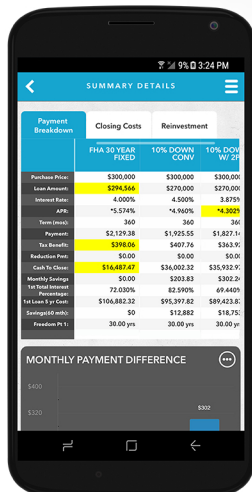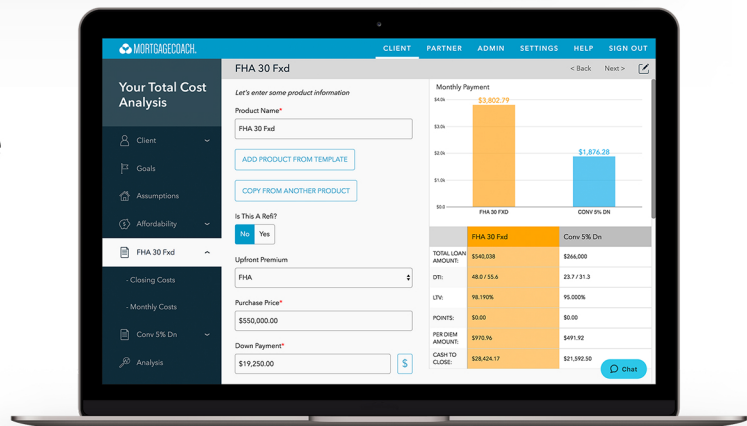
3 **LOG IN** to Mortgage Coach to complete the presentation once you receive the notification from SimpleNexus.

CLICK ON your borrower's name on the home page.

**COMPLETE** the information as you move through the tabs.

The borrower version of the presentation will update real time within the SimpleNexus app.

How the SimpleNexus and Mortgage Coach Integration Works

How to replace an existing Mortgage Coach TCA link within the SimpleNexus application

This feature can be leveraged when a Mortgage Coach Total Cost Analysis presentation has been created prior to a borrower/prospect starting or completing a loan application within the SimpleNexus solution. Replacing the Mortgage Coach TCA link allows borrowers/prospects the ability to view a composed Total Cost Analysis you've recently created instead of the initial TCA rendered within the SimpleNexus app with limited loan information. Example: Loan Terms, Interest Rates & Closing Costs/Settlement Charges.
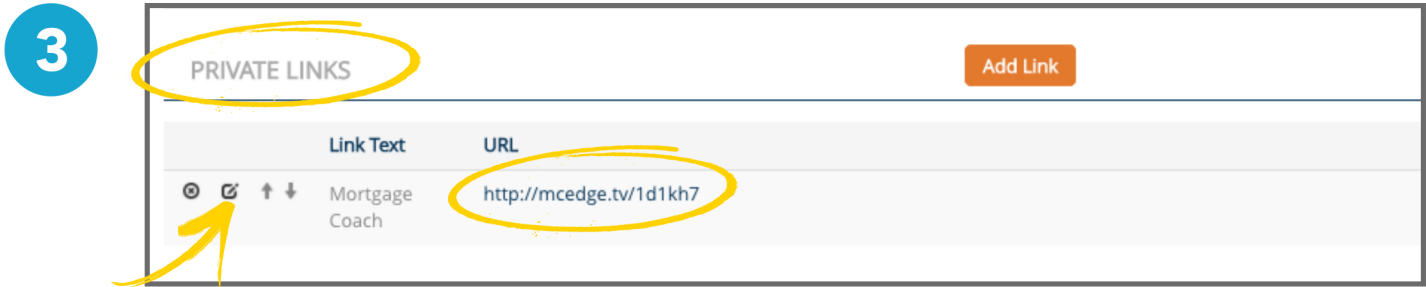
1
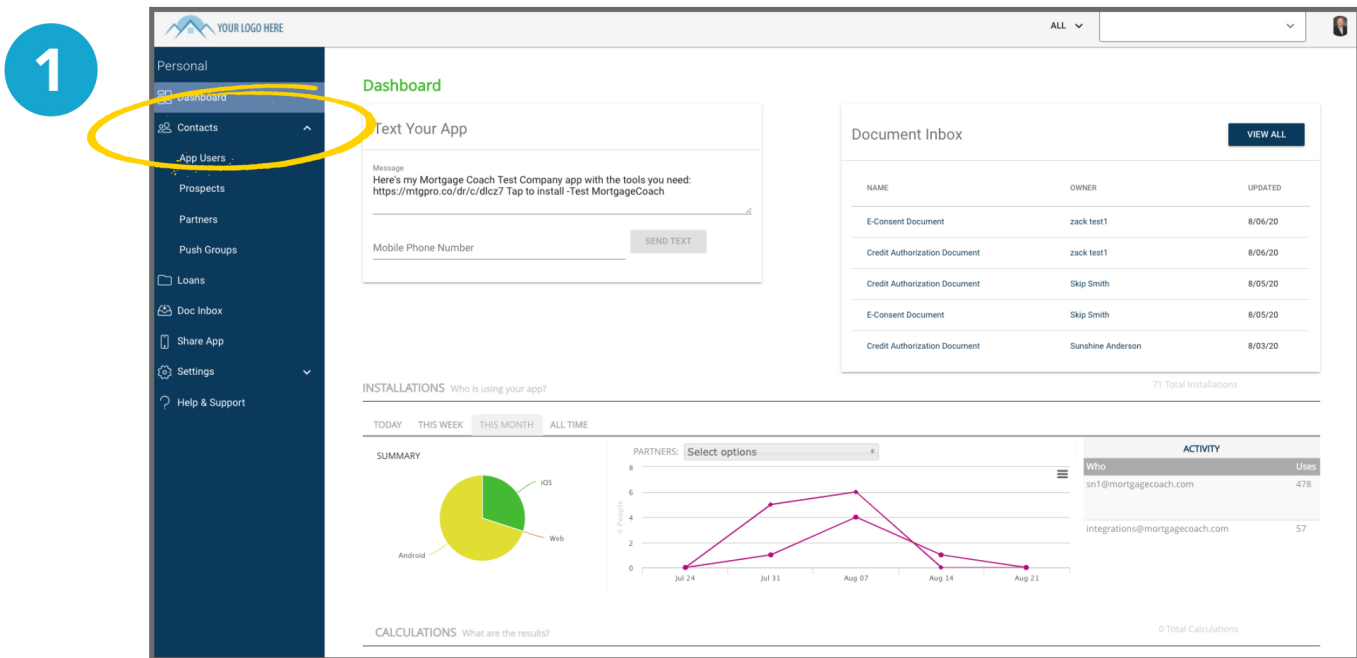
Access the SimpleNexus solution using the browser.
From the Dashboard, **expand the drop-down options** under **Contacts**.

2 **Select App Users**
and **click** the arrow
to expand the record
for the desired
borrower/prospect.

3

PRIVATE LINKS | Add Link

	Link Text	URL
⊙ ☑ ↑ ↓	Mortgage Coach	http://mcedge.tv/1d1kh7
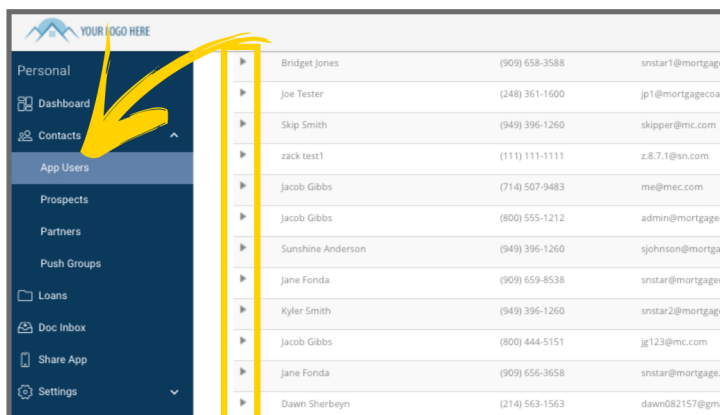
Scroll to the bottom of the screen.

Locate the Mortgage Coach URL under **Private Links**.

Click the ✎ [**edit icon**] to replace an existing Mortgage Coach TCA link exposed to the borrowers/prospects within the SimpleNexus mobile app.

4

Edit Link

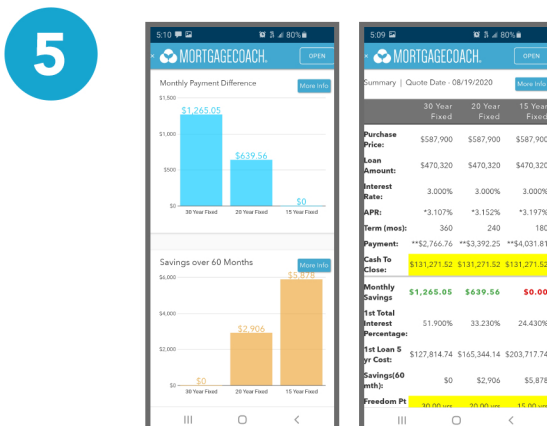Type: Mortgage Coach
URL: http://mcedge.tv/1d1kh7

Cancel   OK
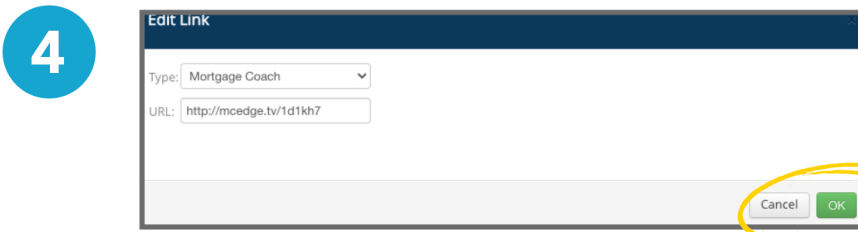
Once the **Edit Link** window appears, **remove** the existing URL link and **copy & paste** the new URL link from the Mortgage Coach TCA report you want to be exposed to the borrowers/prospects within the SimpleNexus App.

Click OK to save the changes.

Note: You must access the Mortgage Coach Advice Engine to locate the new report URL within your MC account.

5

After successfully making the changes, each borrower or prospect accessing the SimpleNexus mobile app will see the updated Mortgage Coach Total Cost Analysis presentation with their complete financing loan options.