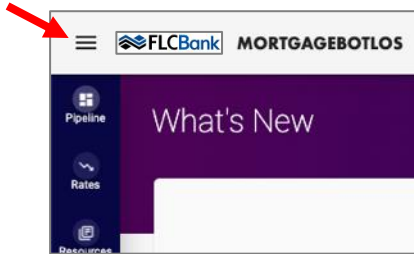


## Overview

We have a new look to our LOS Mortgagebot User Interface (UI).

The menu navigation which has moved from the top of the window to the left side. After you log in you will need to **CLICK on the 3 black lines** to display the navigation down the left side of the screen.

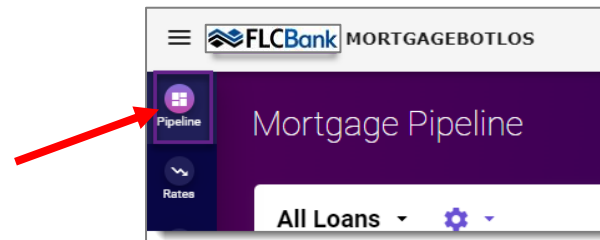


### Highlights of the new UI:

- A simplified and streamlined navigation menu that helps you find what you are looking for faster and easier.
- A robust search feature, where you can type a minimum of three characters to begin your search
- If you need it, the UI is now responsive, with an adaptive layout that works across different devices and screen sizes.

## New Pipeline Page

Click on the Pipeline Icon to view the New Pipeline window.



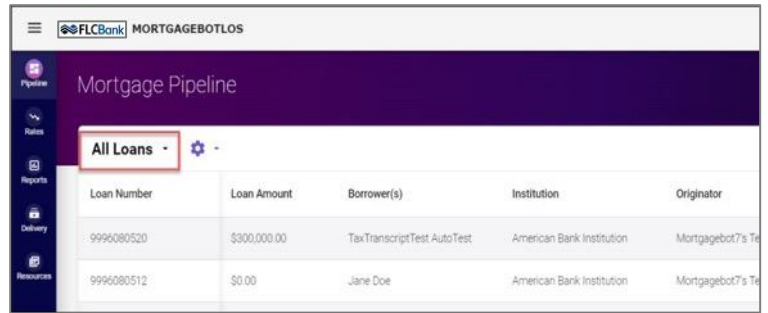
### Features of the New Pipeline page:

- **Pipeline View Name** dropdown (Default is All Loans) – This is where you find and navigate to different pipeline views you have created and saved.
- **Gear Icon** dropdown – This is where you create and manage different pipeline views.
- **Quick Search** field – You can quickly search for loans by borrower's last name, loan number, POS identifier, agency case number, and investor loan number. Search can be done with a minimum of three characters.
- **Advanced Search or Filters** – allows you to search for loans by selecting filter criteria.
- **Pagination Footer** – allows you to navigate between pages and select how many loans to view per page.

| Loan Number | Loan Amount  | Borrower(s)                                       | Institution               | Originator              | Street Address    | City       |
|-------------|--------------|---|---------------------------|-------------------------|-------------------|------------|
| 9996080520  | \$300,000.00 | TaxTranscriptTest AutoTest                        | American Bank Institution | Mortgagebot7's Tester's | 123 St Address    | CEDARBURG  |
| 9996080512  | \$0.00       | Jane Doe  | American Bank Institution | Mortgagebot7's Tester's | 1234 test address | Mequon     |
| 9996080462  | \$85,000.00  | Homer Loanseeker                                  | American Bank Institution | Mortgagebot7's Tester's | Main street 12    | Mequon     |
| 9996080496  | \$0.00       | Jane Doe  | American Bank Institution | Mortgagebot7's Tester's | 1234 test address | Mequon     |
| 9996079837  | \$170,000.00 | Tim Test  | American Bank Institution | Mortgagebot7's Tester's | 321 Cross Ln      | Burlington |
| 9996080504  | \$150,000.00 | Patty Test<br>Joe Builder<br>Jane Doe<br>John Doe | American Bank Institution | Mortgagebot7's Tester's | 9400 Owl Lane 1   | BOULDER    |
| 9996080488  | \$0.00       | Jane Doe  | American Bank Institution | Mortgagebot7's Tester's | 1234 test address | Mequon     |

## New Pipeline Window

When you click on the Pipeline icon the window will display the default Pipeline View which is called “All Loans” and displays a default set of columns which are:



| Loan Number | Loan Amount | Borrower(s) | Loan Purpose | Street Address | City | State | Zip | Institution | Originator | Pipeline Status |
|-------------|-------------|-------------|--------------|----------------|------|-------|-----|-------------|------------|-----------------|
|-------------|-------------|-------------|--------------|----------------|------|-------|-----|-------------|------------|-----------------|

### Columns

The columns on the new Pipeline screen are no longer grouped. Instead, columns are separate like in an Excel worksheet. In addition, the first column in the Pipeline is locked and remains static when you scroll to the right to see all the column data.

### Additional Columns

Additional columns are available that can be added or removed (GEAR ICON) from the default view to create a more Customized Pipeline View. In addition, you can save your customized pipeline view and give it a specific name, allowing the option to go back to view the default pipeline view (All Loans) or your customized pipeline view.

### Column Sort

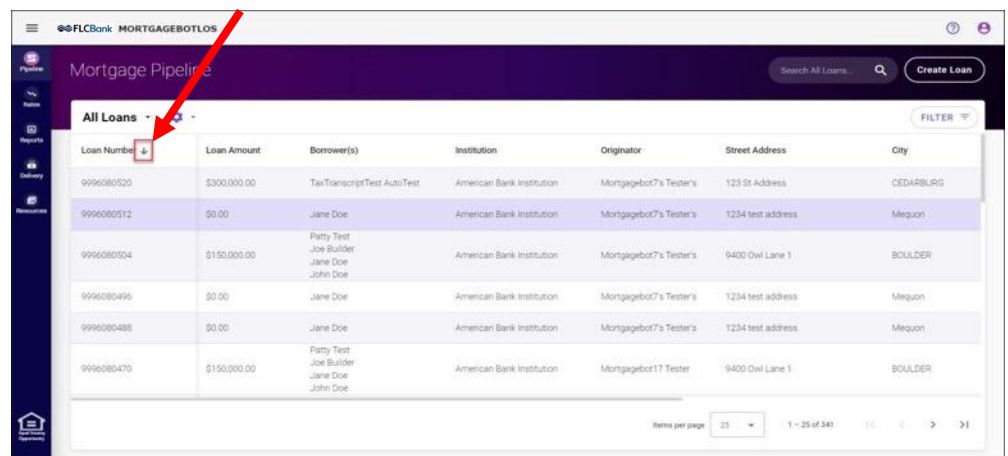
By default, loans on the pipeline are sorted by the most recently updated loans first. If no date filters are applied to the pipeline view, loans displayed are limited to those updated within the last two years.

Clicking a column header sorts all loans displayed by the selected column.

The first click of a column header sorts the loans in descending order for the column selected. A down arrow displays next to the column header name.

The second click of a column header sorts the loans in ascending order for the column selected. An up arrow displays next to the column header name.

The third click of a column header disables the sort for the column selected. Loans return to the display of the most recently updated loans first. No arrow displays next to the column header name.



When sorting a column, all loans in the pipeline are re-sorted. You are returned to the first page of results each time a column sort is initiated.

## Gear Icon

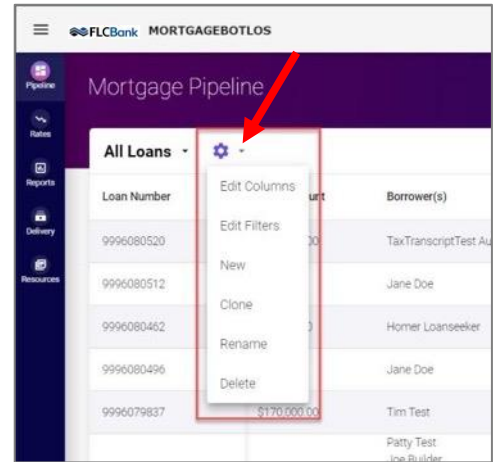
The **Gear Icon** allows you to create and manage different Pipeline Views other than the default Pipeline View which is named “All Loans”. You can **CREATE** a **Custom Pipeline View** by adding/removing columns and applying filters to your pipeline view.

**TIP:** If you make changes to the default pipeline view (All Loans) or another pipeline view by adding or removing columns and/or filters and want to keep the new view you created for future use, you **MUST Clone or select New** from the Gear Icon dropdown before leaving the screen to save a **Custom Pipeline View** with a new name.

### How to Create a Custom Pipeline View

To create a **Custom Pipeline View** click the arrow next to the Gear Icon to view the following options:

- **Edit Columns** – Add or remove columns displayed.
- **Edit Filters** – Change the filters applied to the current pipeline view
- **New** – creates a new Pipeline View
- **Clone** – Creates a clone or copy of the current Pipeline view that is displayed.
- **Delete** – Selecting delete will remove the current displayed Pipeline view. **CAUTION** - This can't be undone, it is permanently deleted.



**NOTE:** If you don't select CLONE or NEW after you create a new pipeline view, the pipeline view will revert to the system default view (All Loans) the next time you log in. You will lose all the options you selected to create a custom view and will have to create it again to view your pipeline with those options.

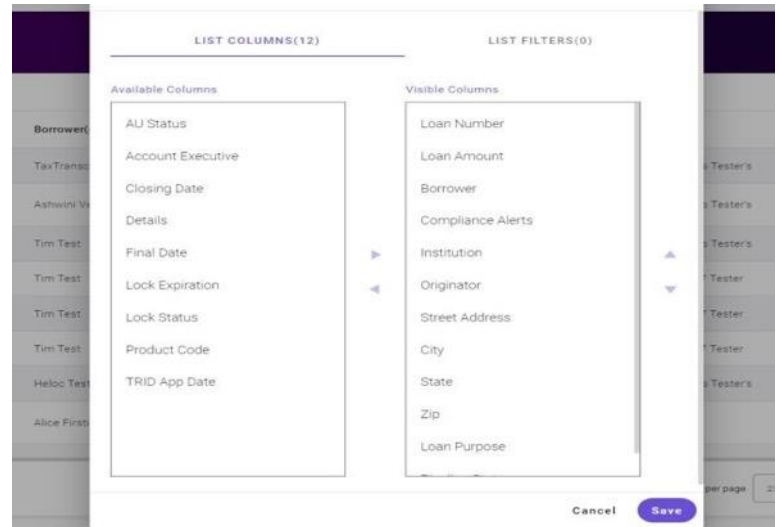
### Gear Icon Option - Edit Columns

When you click the “**Edit Columns**” option under the purple gear icon the following window pops up. Giving you the option **ADD** and **REMOVE** columns from the pipeline view.

The List tab displays with two sections: “**Available Columns**” and “**Visible Columns.**”

The “**Available Columns**” list shows which columns are available to display, but not currently displayed in the pipeline view.

The “**Visible Columns**” list shows you what columns are currently displayed with the pipeline view.



Column values can be added or removed between the “Available Columns” and “Visible Columns” lists by doing one of the following:

1. Select a column name and drag and drop it.
2. Select a column and then using the **arrow buttons < and >** between the two lists move the column from one list to the other list.

You can change the order or position of the columns by changing the “Visible Columns” list by doing one of the following:

1. Select a column name and drag and drop the column name up or down in the list.
2. Select a column and then using the **up and down arrows** to the right of the “Visible Columns” list move the column’s position up or down in the list.



The column name at the top of “Visible Columns” will be the first column that appears for the pipeline view.

**REMINDER:** The first column in the Pipeline is locked and remains static when you scroll to the right to see all the column data.

Once you have the columns you want, **CLICK** the “Save” button to save any changes made on the “List Columns” tab for the pipeline view.

Clicking the “Cancel” button results in none of the changes being saved. The only way to exit out and not save the changes is via the cancel button. There is no longer an “x” button in the top right of the popup screen.

**NOTE:** Some columns are only available based on User credentials.

1. Account Executive (Only displays as a column option if your user profile has this option enabled).
2. Processor Only displays as a column option if your user profile has this option enabled).
3. Compliance Alerts (Only displays as an option when Compliance Alerts are enabled)

## Gear Icon – Edit Filters

Filters can be applied to the pipeline view by clicking on the “**Edit Filters**” option under the purple gear icon.

To apply filters to the current Pipeline view displayed, Click on the “**Add Filter**” purple button.

The following window pops up displaying a list of Filters that can be **CHECK** or **UNCHECKED** to apply to the pipeline view.

Filter Categories are:

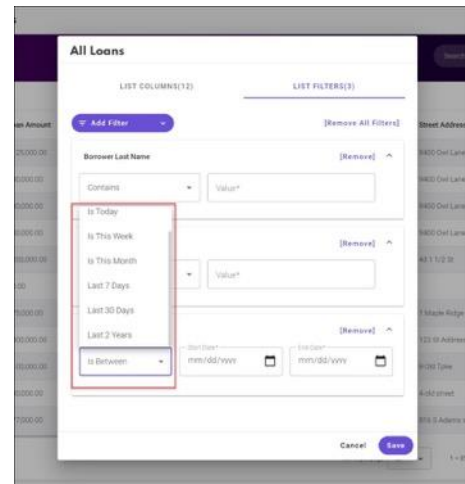
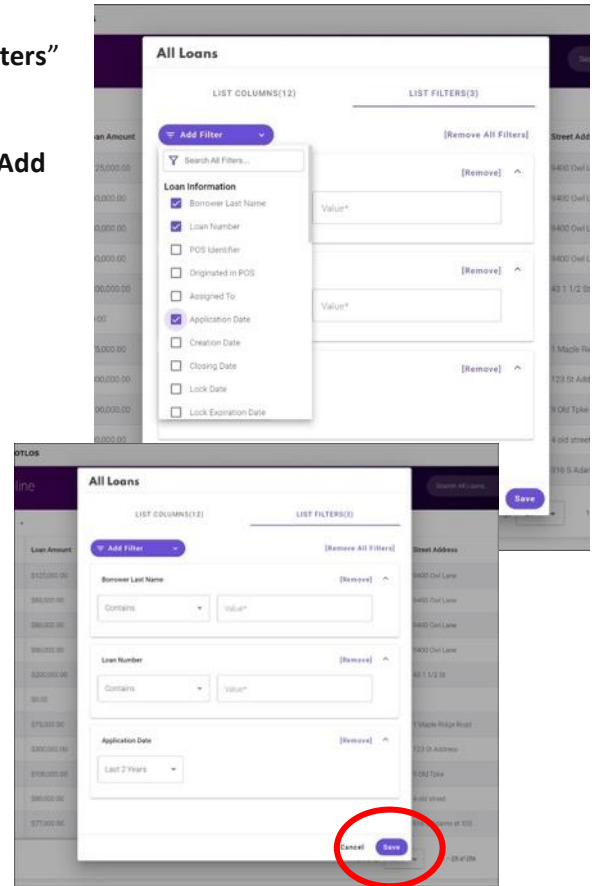
- Loan Information
- Property Information
- Loan Status
- Lender/Institution

When a filter is checked, a window appears where you must enter the data criteria for that particular filter.

Then you need to **CLICK** the “**SAVE**” button to apply the filter.

### NOTE:

1. If no date ranges are selected in the filter criteria, results default to displaying matching loans that have been created/updated within the last two years. Exception to this rule: if searching by Borrower Last Name or Loan Number no date limits are applied.
2. For Date filters, “Last 2 Years” has been added to the dropdown list.

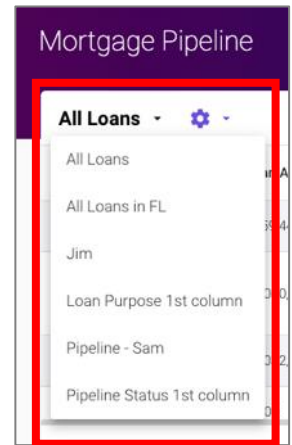


## Gear Icon – New, Clone, Rename, Delete

### How to Save a Custom Pipeline View

You can create and save multiple custom Pipeline Views based on your needs. Once you make changes to the default pipeline view (All Loans) or another pipeline view and you want to keep it for future use, you **must select New or Clone** from the purple **Gear Icon** dropdown before leaving the screen to save a **Custom Pipeline View**.

**NOTE:** If you don't select **NEW** or **CLONE** after you create a new pipeline view, the pipeline view will revert to the system default view (All Loans) the next time you log in. You will lose all the options you selected to create a custom view and will have to create it again to view your pipeline view with those options.

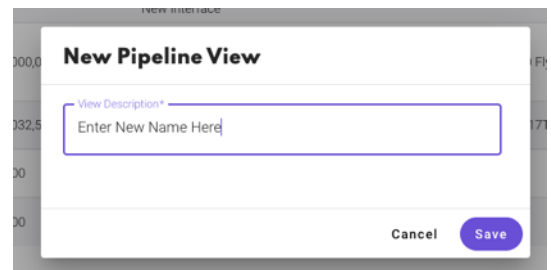


### NEW Pipeline View

Select "New" from under the Gear Icon and a "View Description" pop-up window will appear.

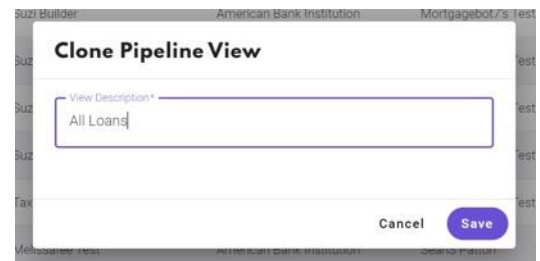
Enter in the Name of your new custom pipeline view and **CLICK the SAVE button**.

If the **Cancel** button is selected the New Pipeline View is not added, and you are returned to the Pipeline View that was displaying before clicking the Gear icon.



### CLONE a Pipeline View

To make a Clone (AKA copy) of a Pipeline View make sure the Pipeline View is displayed. Then select "Clone" under the purple gear icon. A "View Description" pop-up window will appear where you will need to type in a New Name for the clone view and **CLICK the SAVE button**.

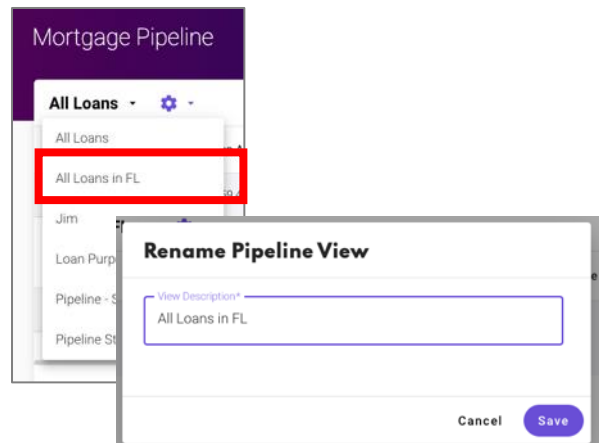


If you select the **Cancel** button the Pipeline View is not Cloned, and you are returned to the Pipeline View that was displaying before clicking the Gear icon.

### RENAME a Pipeline View

To rename a Pipeline View FIRST select the pipeline from the Pipeline View Dropdown. Then select "Rename" under the purple gear icon. A "View Description" pop-up window will appear where you will need to type in a New Name for the view and **CLICK the SAVE button**.

If you select the **Cancel** button the Pipeline View is not Renamed, and you are returned to the Pipeline View that was displaying before clicking the Gear icon.



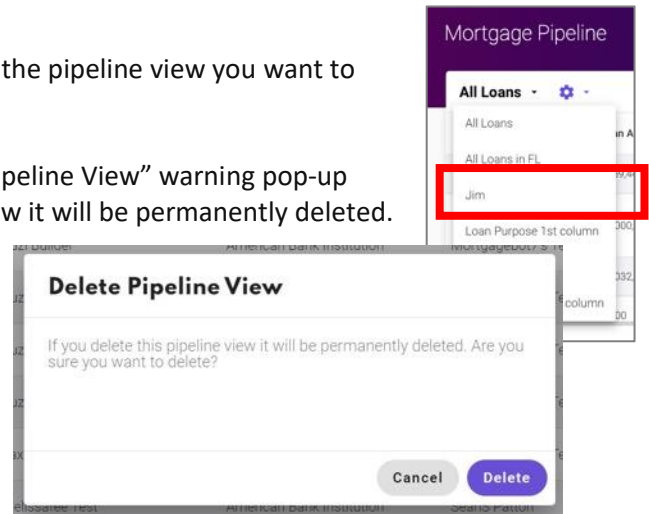
### DELETE a Pipeline View

To delete a Pipeline View it is **very important to FIRST** select the pipeline view you want to delete from the Pipeline View Dropdown.

Then select “Delete” under the purple gear icon. A “Delete Pipeline View” warning pop-up window will appear asking you “If you delete this pipeline view it will be permanently deleted. Are you sure you want to delete?”

You should then click the **CANCEL or DELETE** button.

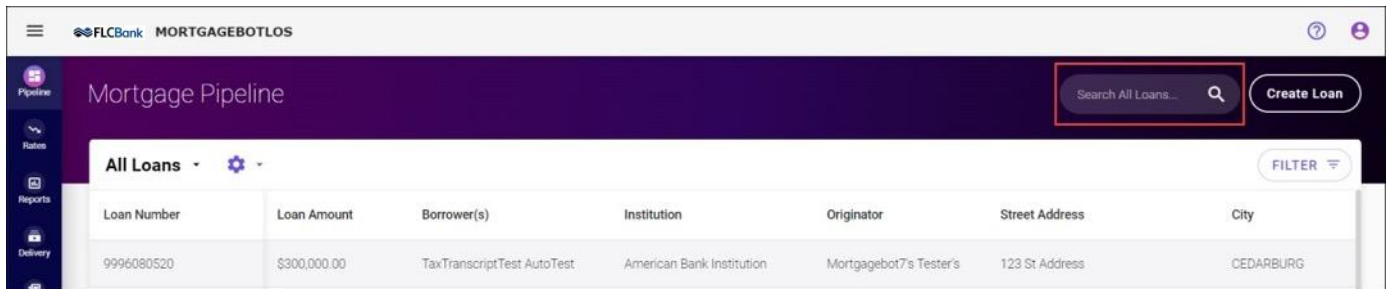
If you select the Cancel button you have not deleted the pipeline view, and you are returned to the Pipeline View that was displaying before clicking the Gear icon.



### Quick Search

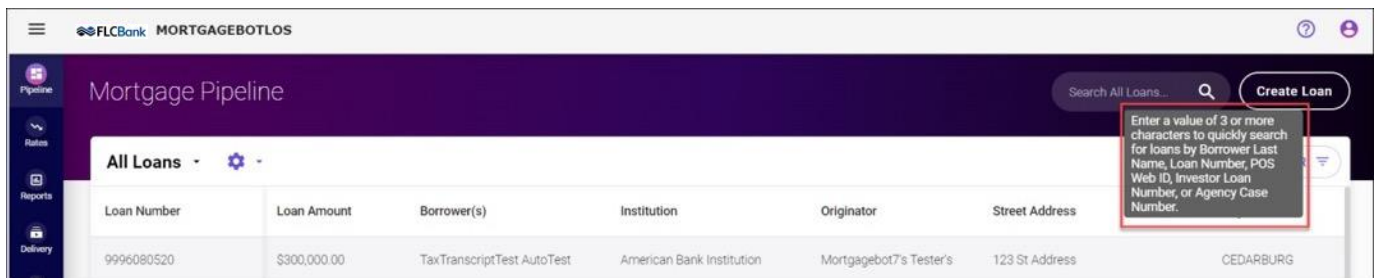
You can perform a quick search of the loan pipeline by entering search criteria text in the “Quick Search” input field and then click on either the magnifying glass icon or press enter on the keyboard.

This tool tip text displays when you hover over the magnifying glass icon: “Enter a value of 3 or more characters to quickly search for loans by Borrower Last Name



When initiated, the system searches for matches (full or partial) across all loans based on these data points:

- Borrower Last Name **Note:** this includes last name for any borrower on the loan (i.e. – primary borrower, co-borrower, secondary borrower, secondary co-borrower).
- Loan Number **Note:** the search is limited to active/unarchived loans updated within the last two years. When the search is complete, results display on the new Pipeline page. In the example below, “Smith” was entered in the Quick Search input field, resulting in loans where Borrower(s) last name is Smith are returned.

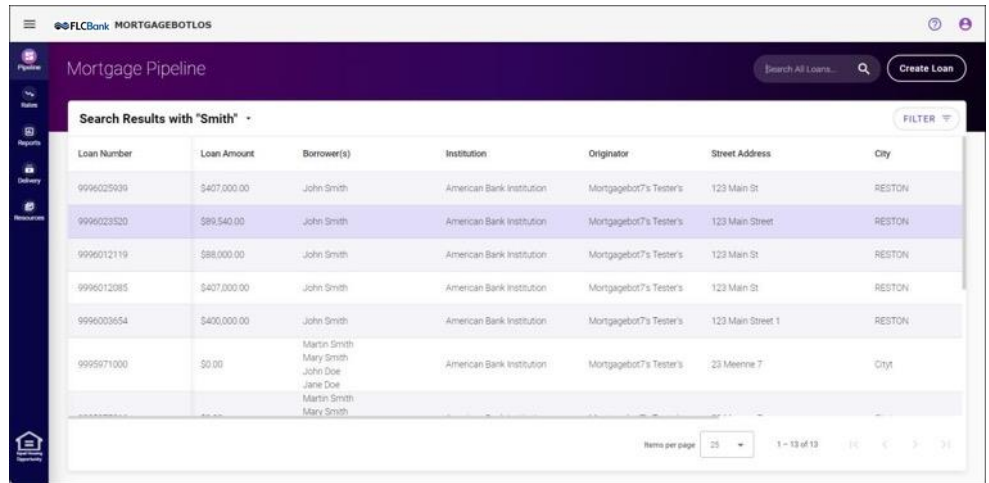


All search results will be displayed in the Default Column order, which is the following:

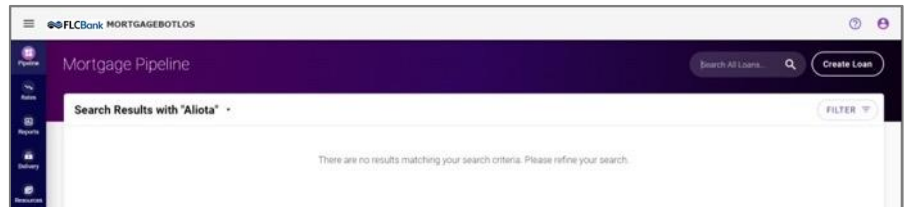
|             |             |             |              |                |      |       |     |             |            |                 |
|-------------|-------------|-------------|--------------|----------------|------|-------|-----|-------------|------------|-----------------|
| Loan Number | Loan Amount | Borrower(s) | Loan Purpose | Street Address | City | State | Zip | Institution | Originator | Pipeline Status |
|-------------|-------------|-------------|--------------|----------------|------|-------|-----|-------------|------------|-----------------|

**Note:** Search results columns cannot be edited.

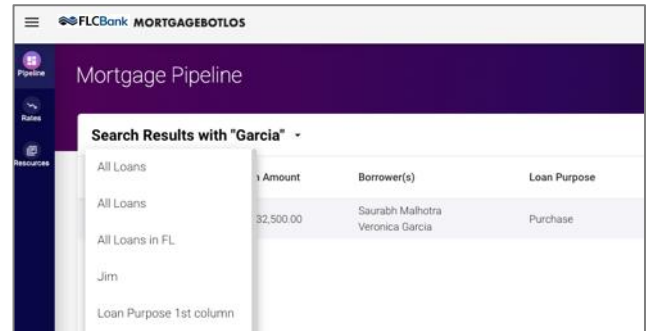
If no matches are found, the following message displays:  
**There are no results matching your search criteria.** Please refine your search.



Quick search requires three characters in the input field. The following error displays if less than three characters are entered or no results.



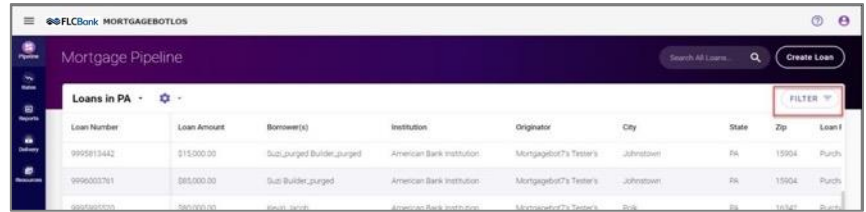
You can navigate back to a saved pipeline view from the search results page by clicking on the "Search Results for **xxxx**" text.





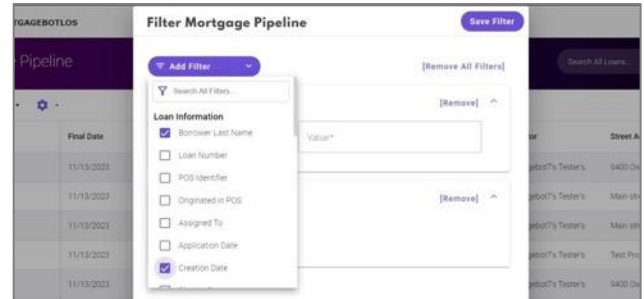
## Advanced Search (Filter Button)

You can perform an advanced search of the loan pipeline by clicking on the “**Filter**” button in the upper right corner of the pipeline page.



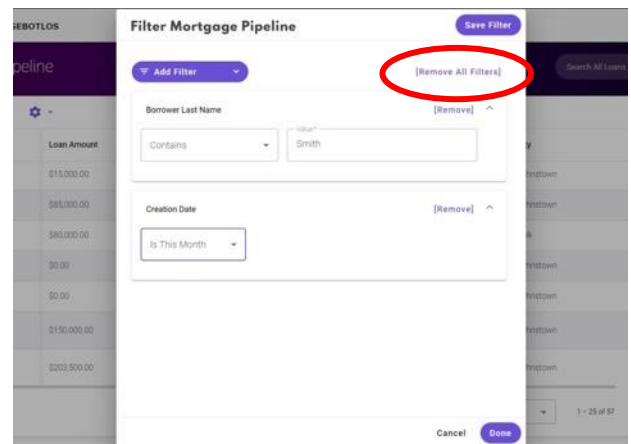
By clicking the “**Filter**” button, the Filter Mortgage Pipeline window displays.

Filters are selected by clicking on the “**Add Filter**” button.



These filters work the same way as when selecting filters on the List > List Filters tab.

When you click on a filter in the dropdown list, the filter displays on the window and you can fill in criteria as needed.



The “[Remove]” and “[Remove All Filters]” links can be used to remove filters from the display.

When you click the “**Done**” button, the filter criteria selected on the window is used to search the pipeline for matches.

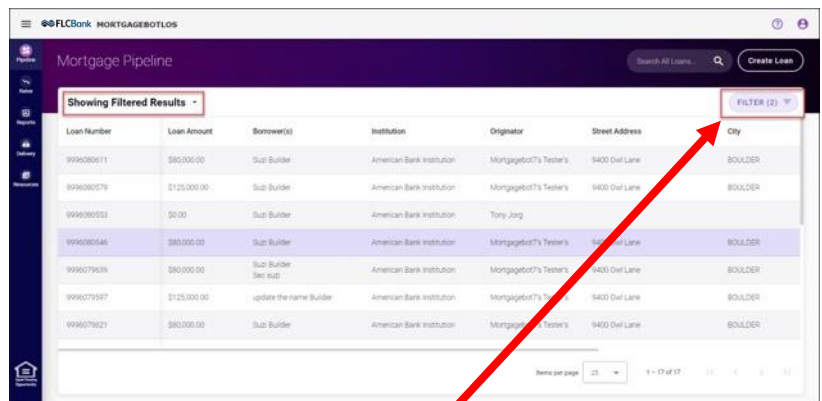
When you click the “**Cancel**” button, the modal closes and no advanced search of the pipeline is performed.

The filtered results display on the pipeline page.

If no date ranges are selected in the filter criteria, results default to displaying matching loans that have been created/updated within the last two years.

Exception to this rule: if searching by Borrower Last Name, Loan Number, or SSN, no date limits are applied.

On the advanced search filtered results page, the “**Showing Filtered Results**” view shows the results of the filters.



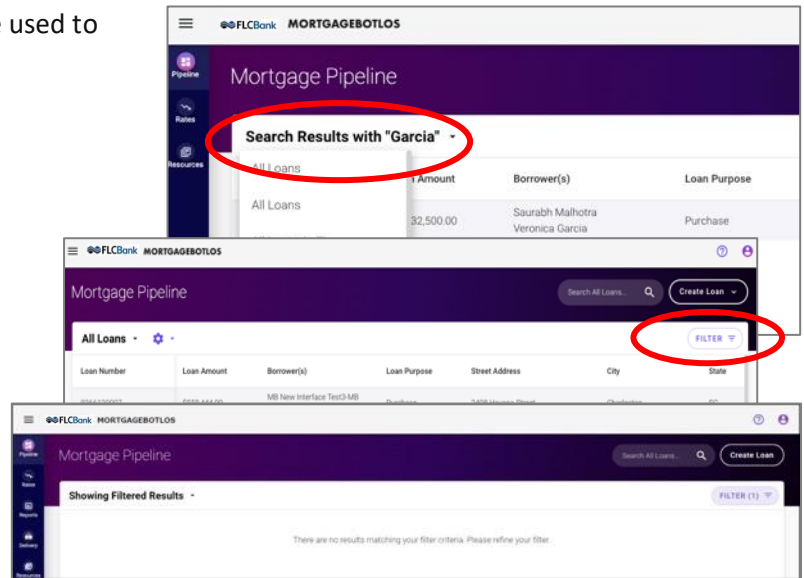
The “**Filter**” button shows how many filters are currently selected for the results.

In the example above, (2) filters were selected. If you click the “**Filter (2)**” button, the Filter Pipeline screen displays again with the selected filters still displaying.

The “**Showing Filtered Results**” dropdown can be used to navigate back to a pipeline view.

When you return to a pipeline view, the Filter button criteria are cleared, and the **Filter Button** goes back to zero filters selected.

If no results are found, the following message displays on the advance search filtered results page: “There are no results matching your filter criteria. Please refine your filter.”



**Note:** if you leave the pipeline page when filtered advance search results display, the filtered results are retained and display again if you return to the pipeline page via the Pipeline icon in the icon column menu.

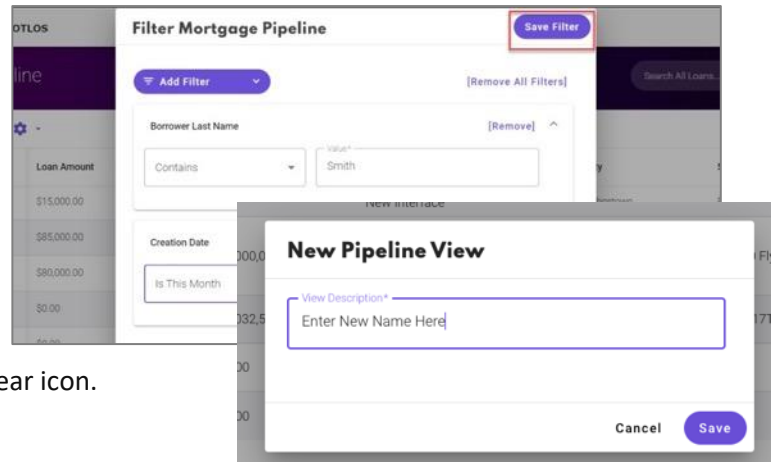
### Saving Filters

Filtered results can be saved as a Pipeline View by selecting the “**Save Filter**” button in the upper right corner of the Filter Mortgage Pipeline window.

When you click on the “Save Filter” button, the “**New Pipeline View**” with the “View Description” pop-up window will appear.

Enter in the Name of your new custom pipeline view with filters and **CLICK the SAVE button**.

If the **Cancel** button is selected the New Pipeline View is not added, and you are returned to the Pipeline View that was displaying before clicking the Gear icon.



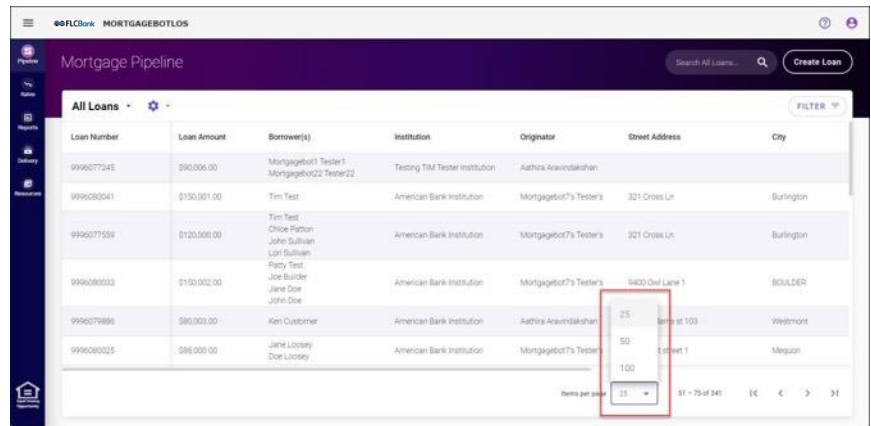
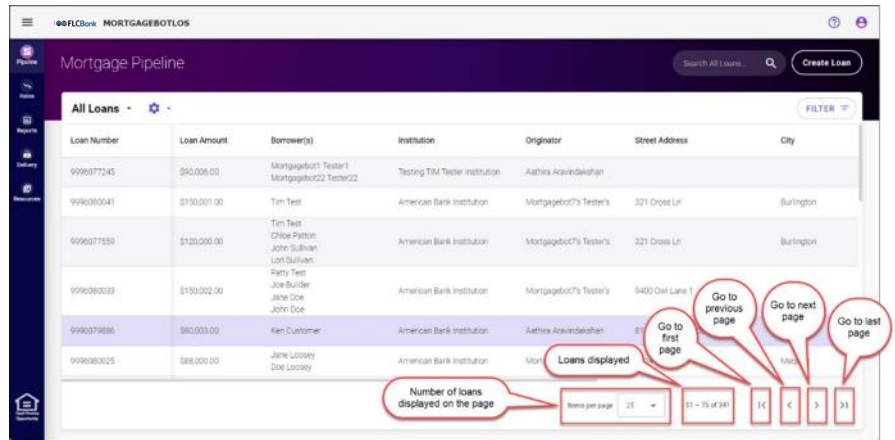
## Pagination Footer

A pagination footer displays at the bottom of the new Pipeline page.

The arrows in the pagination footer can be used to navigate between pages.

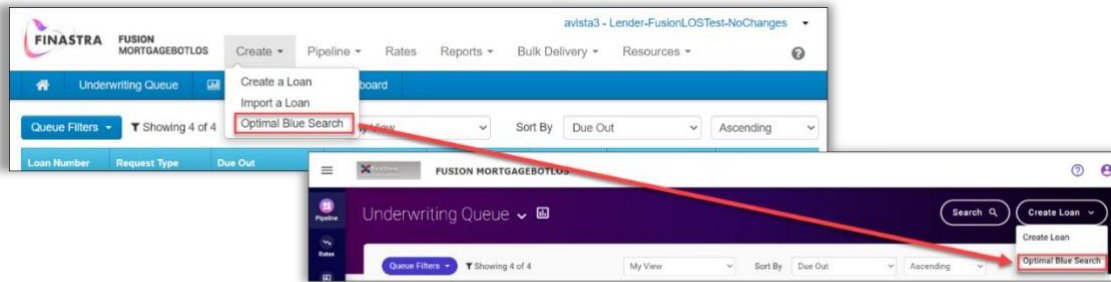
The “Items per page” dropdown can be used to change the number of loans displayed per page. By default, 25 is selected. You can change the view to one of the following: 25, 50, or 100.

When a different value is selected in the “Items per page” dropdown, the pipeline view will refresh to the first page and display the newly selected number of loans. For example, if the pipeline is set up to display 25 loans per page and the second page is currently displayed, if the user changes the “Items per page” value to 50, the pipeline refreshes to display the first page with the first 50 loans displayed.



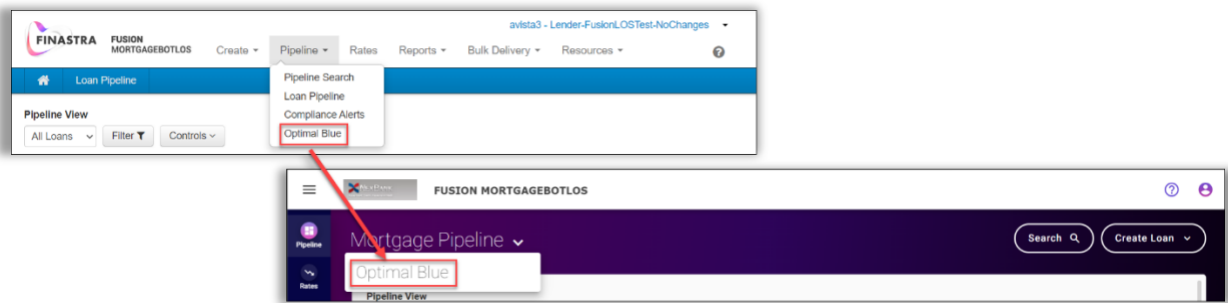
### Optimal Blue Search

When Optimal Blue is enabled, the Optimal Blue Search modal can be accessed by clicking on the Create Loan button on the pipeline pages and then clicking on Optimal Blue Search in the dropdown.



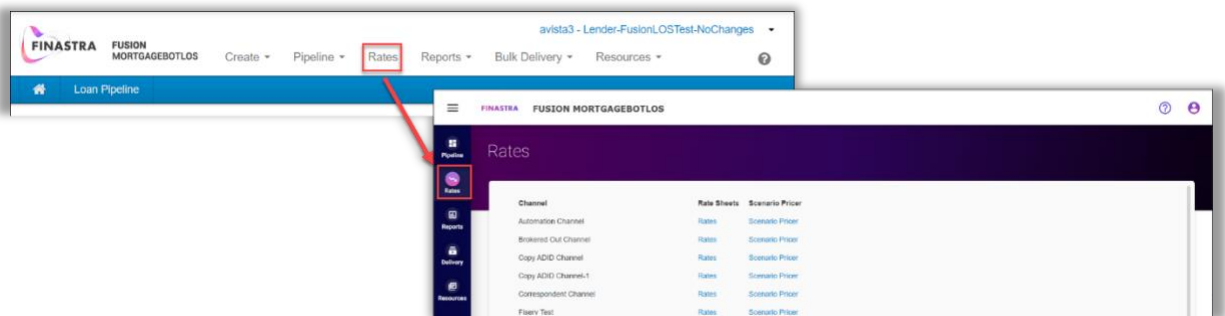
### Optimal Blue Pipeline

When Optimal Blue is enabled, the Optimal Blue Pipeline can be accessed from the Mortgage Pipeline page by clicking on the Pipeline dropdown arrow and clicking Optimal Blue.



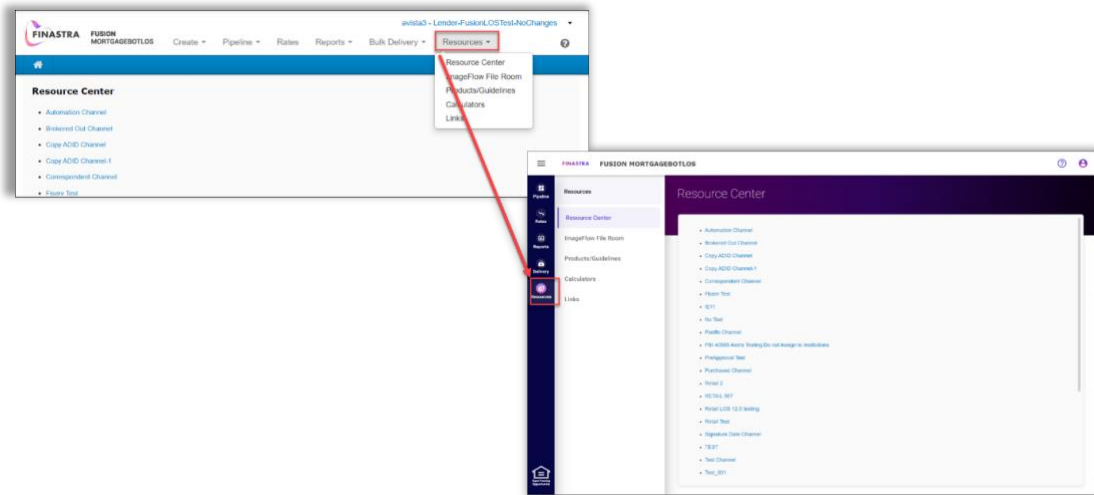
### Rates

The Rates page can be accessed by clicking on the Rates icon in the icon column menu.



## Resources

Resource menu options can be accessed by clicking on the Resources icon in the icon column menu. When clicked, the Resources menu displays to the right of the icon column menu, allowing you to navigate to resource pages.



## Loan

When accessing a loan from a pipeline page, a loan icon displays in the icon column menu, along with the loan menu. Menu options in the loan menu can be used to navigate to specific loan pages. The loan icon in the icon column menu can be used to navigate back to the loan menu when on a loan page but viewing a different menu (i.e. – Resources, Delivery, Reports).

