NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

Purpose

Pricing Alerts enable the system to automatically notify you, your borrower, and/or any designated loan contacts when pricing meets a specified threshold. This functionality eliminates the need to manually monitor pricing on a particular transaction as market adjustments occur.

On each business day, the system evaluates active pricing alerts at 11:00 a.m. and 6:00 p.m. CT to determine whether current pricing meets or exceeds the criteria established in the alert. Once all specified pricing targets are achieved, a notification will be sent to you and any additional contacts associated with the alert.

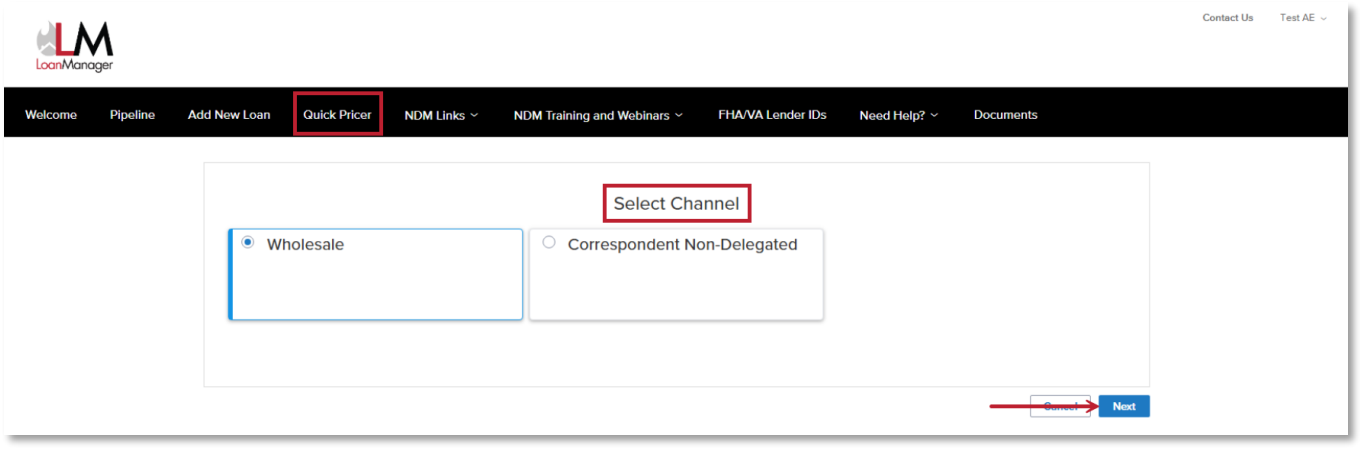
Contents within this Job Aid

Creating a Prospect
How to Access Prospects
Creating a Pricing Alert on a Prospect
Creating a Pricing Alert on a Registered Loan
Updating Pricing Alert
Cancel Pricing Alert

Creating a Prospect

STEP 1

Once you are logged in to Loan Manager, click on Quick Pricer > Select Channel > Click Next



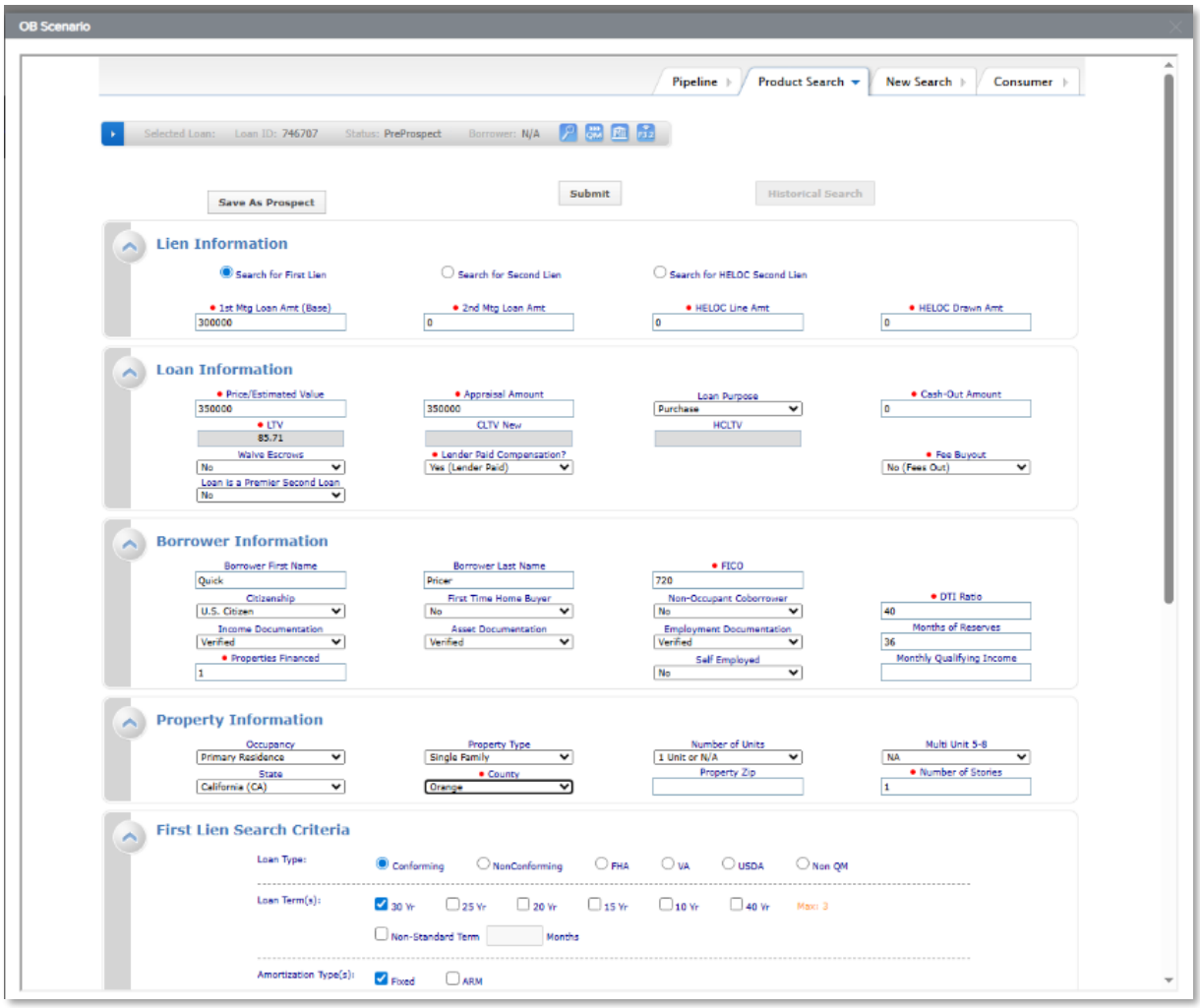
Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

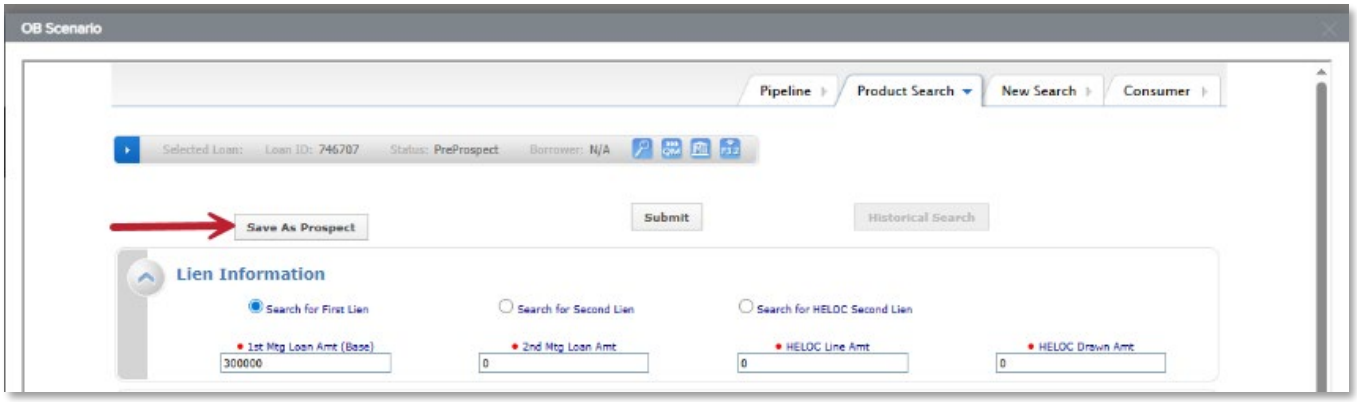
STEP 2

Complete the required fields *(indicated with a red asterisk)* along with any additional fields you wish to complete



STEP 3

Click Save As Prospect



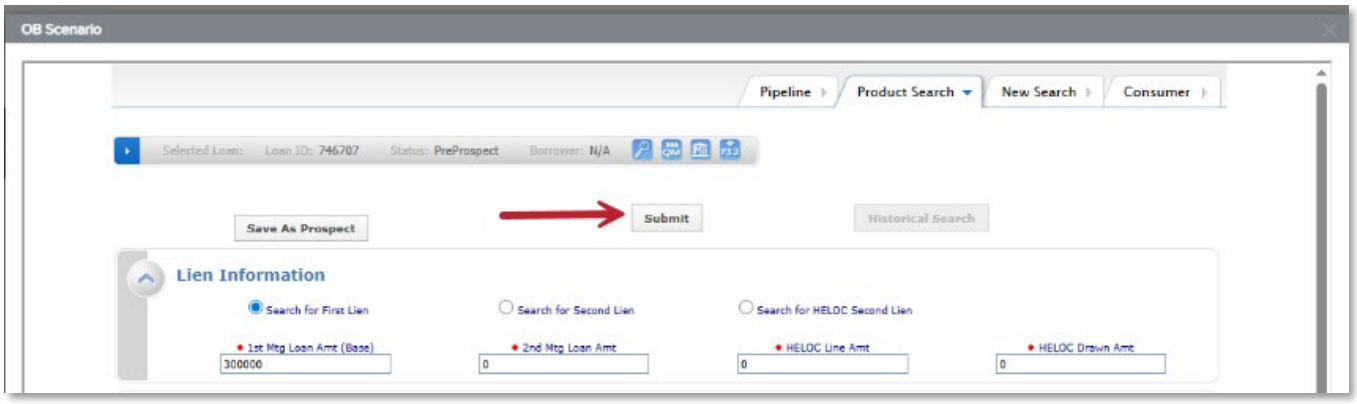
Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

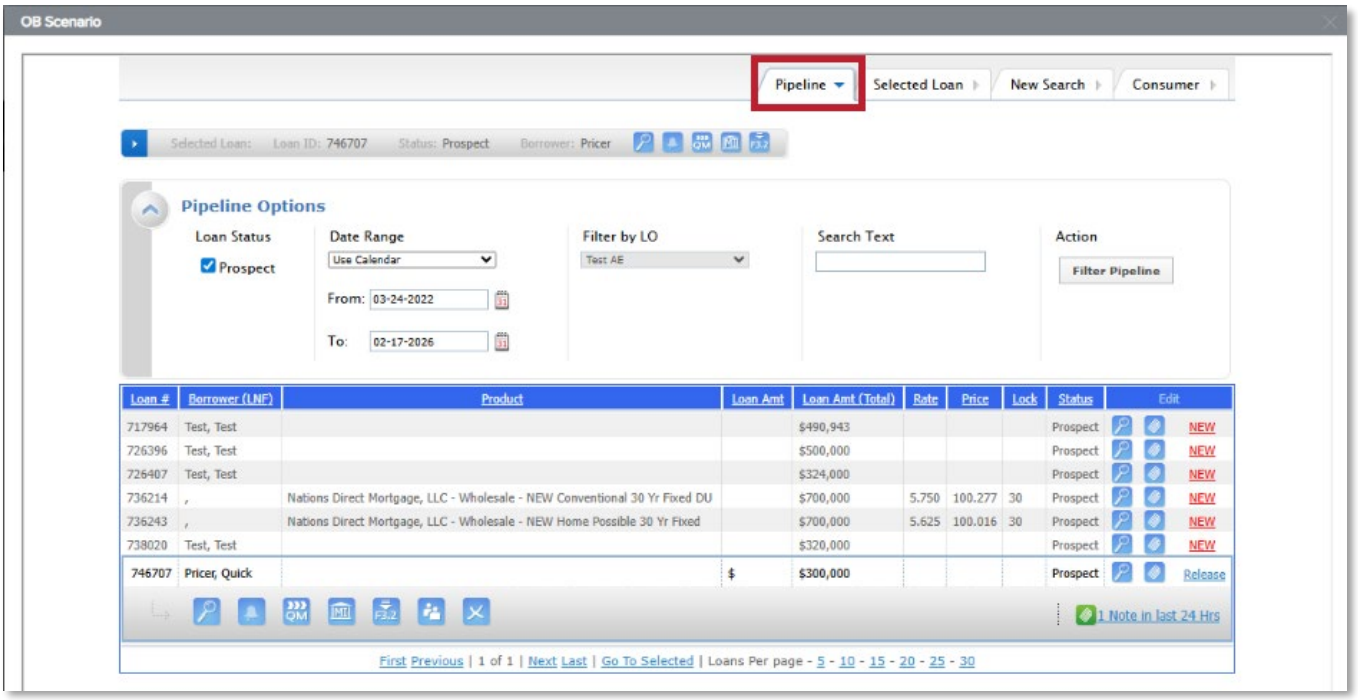
STEP 4

Click Submit to see current pricing for that scenario



How to Access Prospects

Once you are logged into Loan Manager, click on Pipeline and you will see all your Prospects listed



Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

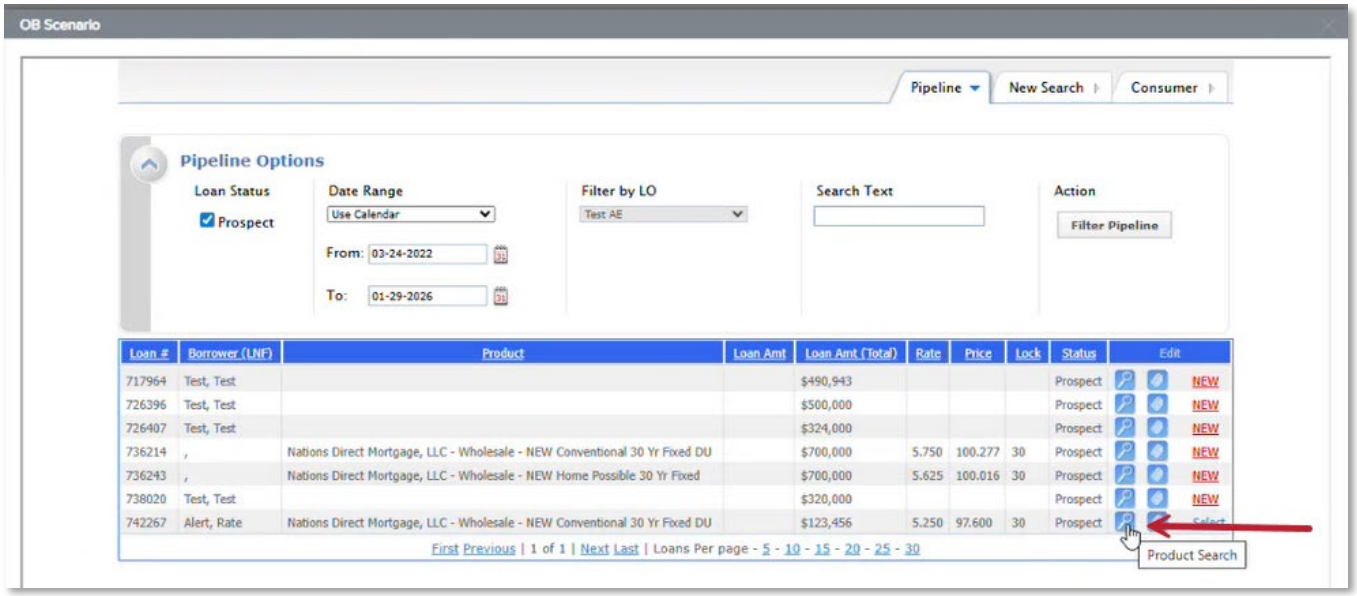
NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

Creating a Pricing Alert on a Prospect

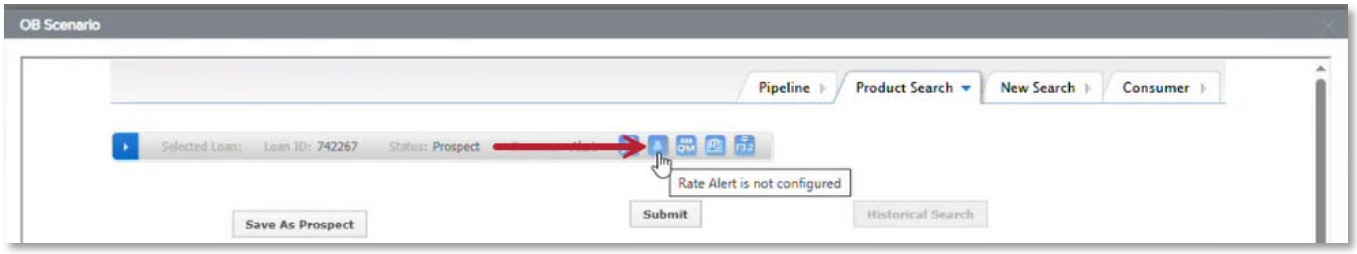
STEP 1

After creating a prospect, click on next to the prospect



STEP 2

This will open the Optimal Blue menu, click on the bell icon at the top



STEP 3

Borrower First Name and Last Name will auto populate from prospect.
Complete the following required fields:

- Desired Rate
- Desired Price
- Desired Lock Period

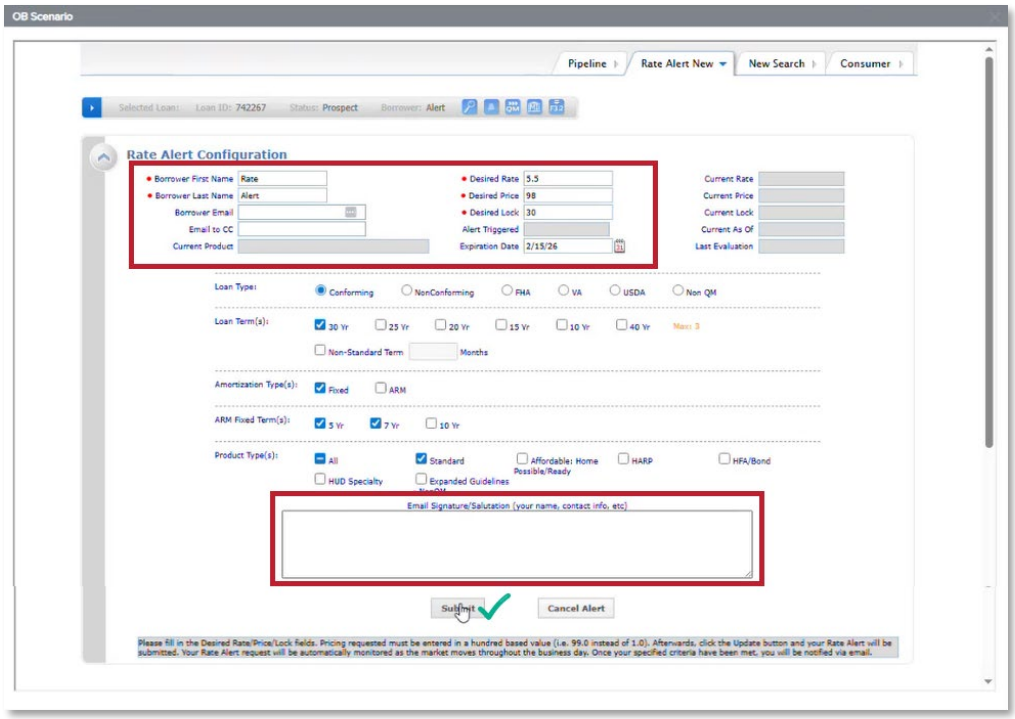
Complete the following **optional** fields, if you wish:

- Expiration Date – this is the date you wish the alert to turn off, if you wish to indicate a date
- Borrower Email – enter if you would like the borrower to also receive an email notification from OB
- Email to CC – any other participants you would like notified such as a realtor, co-borrower, etc.
- Email Signature – you can enter messaging here with your name and phone number if you wish

Click Submit once you have completed all desired fields.

Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

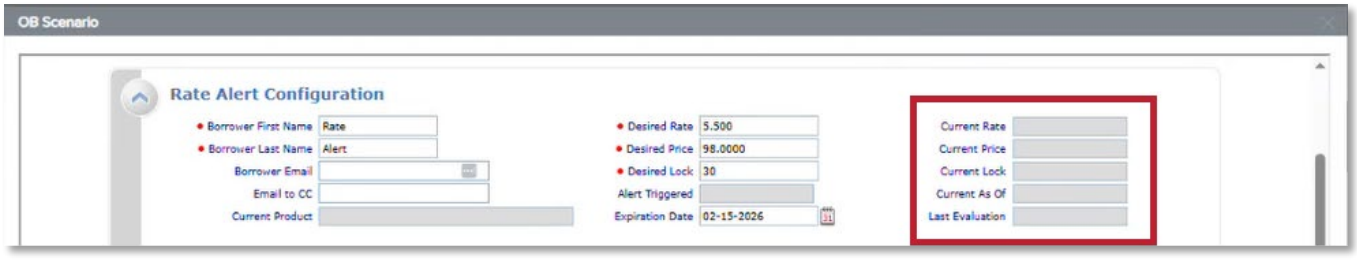
How to Create a Prospect and Pricing Alert



STEP 4

Every business day, Optimal Blue will check the alerts at 11am and 6pm CT to see if pricing meets or is better than the alert created.

When pricing reaches all 3 of the desired points, an email notification from Optimal Blue will be sent to you and any email address you've entered, and the information located within the grey boxes will be completed.



Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

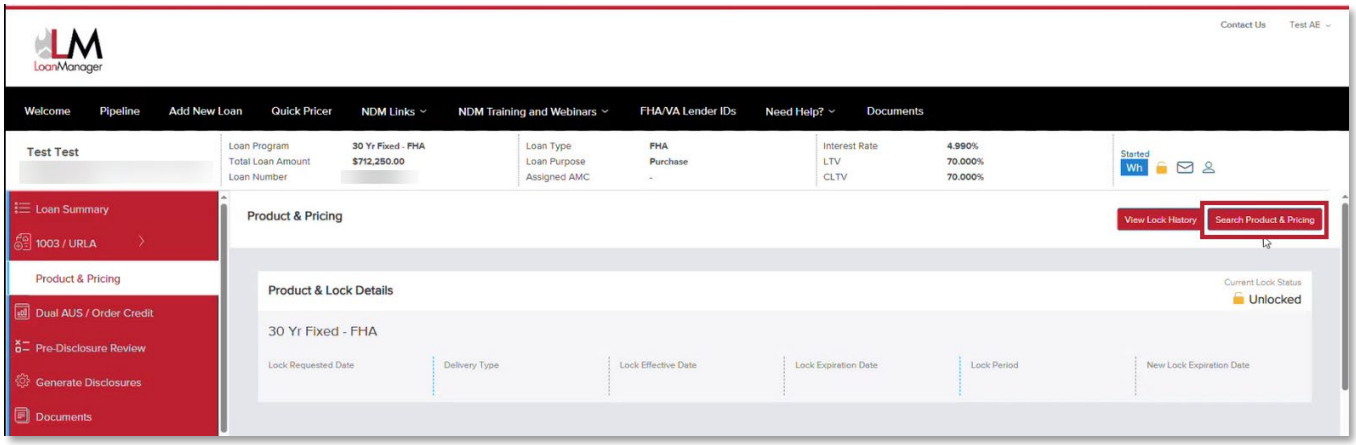
NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

Creating a Pricing Alert on a Registered Loan

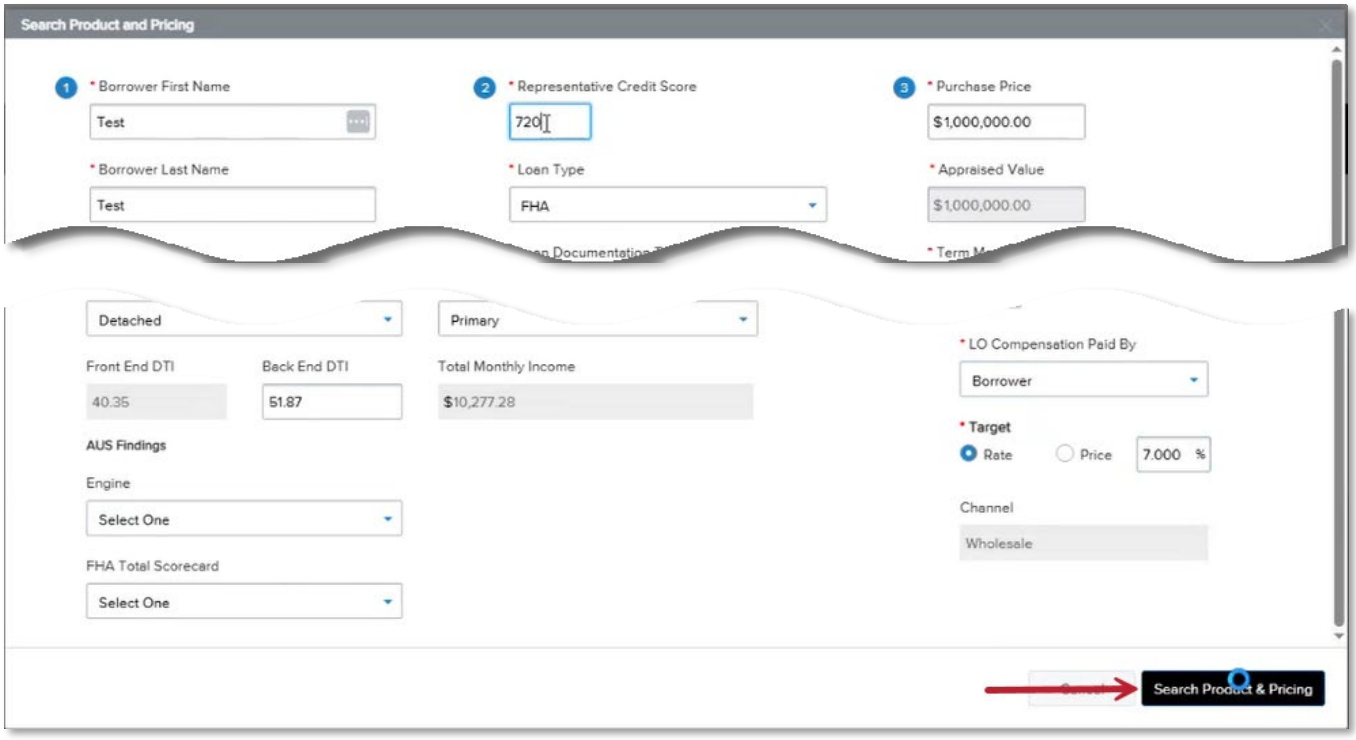
STEP 1

Go into the loan in Loan Manager, click on Product & Pricing then Search Product & Pricing



STEP 2

Make sure all fields are complete, such as the Representative Credit Score and LO Compensation Information and click Search Product & Pricing



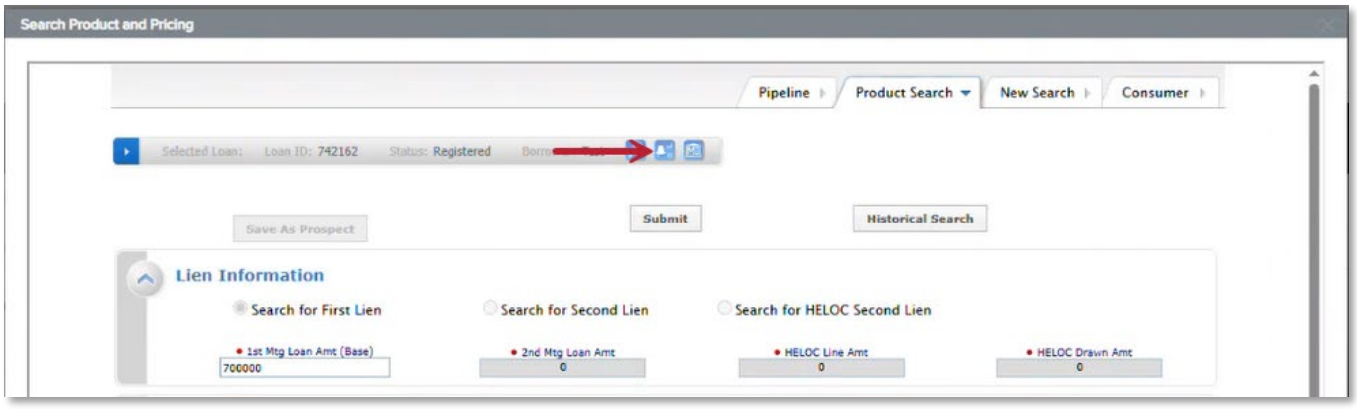
Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

How to Create a Prospect and Pricing Alert

STEP 3

Fully complete the Optimal Blue form with all information you would provide if locking the loan, then click on the bell icon at the top



STEP 4

Borrower First Name and Last Name will auto populate from prospect.
Complete the following required fields:

- Desired Rate
- Desired Price
- Desired Lock Period

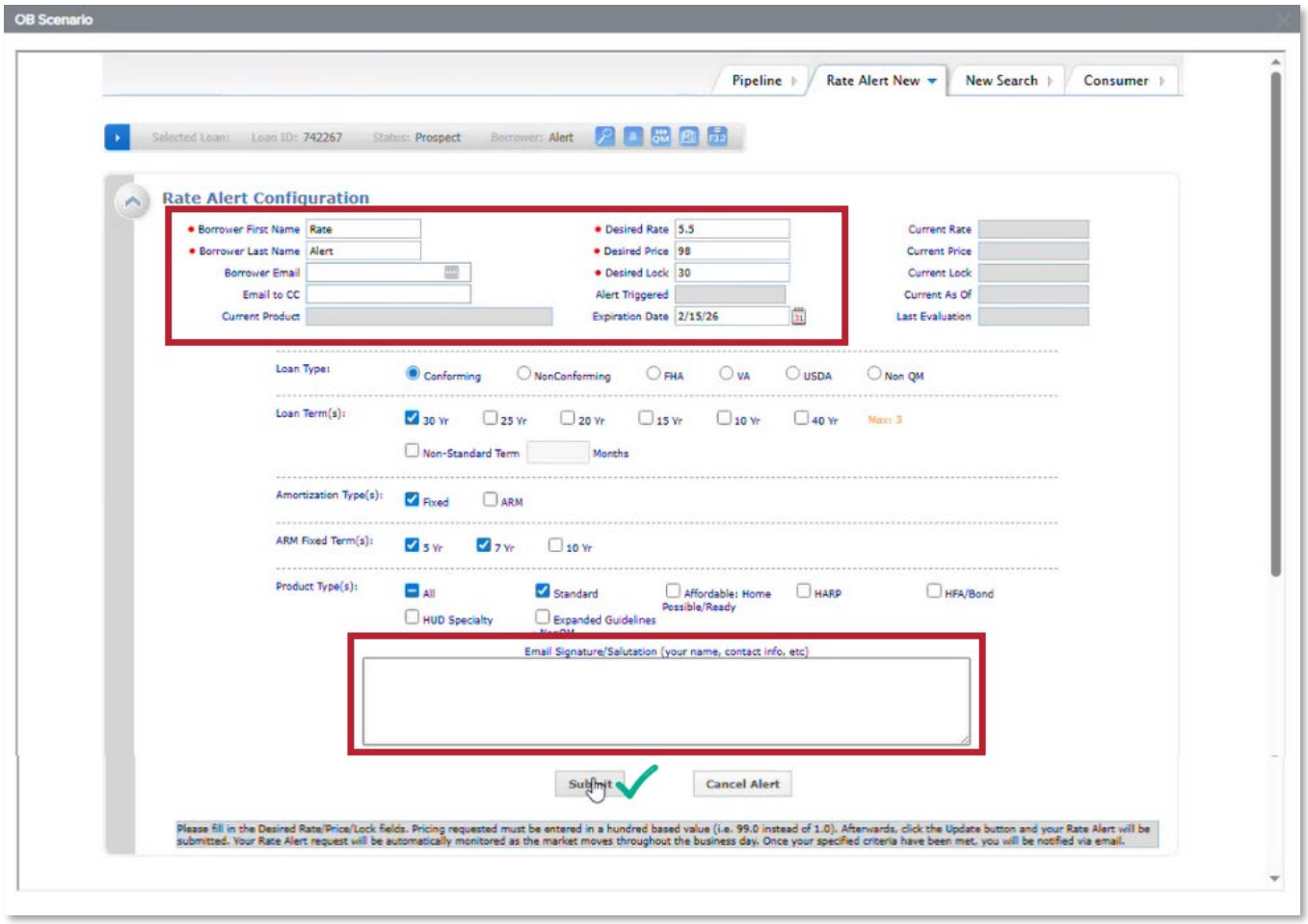
Complete the following **optional** fields, if you wish:

- Expiration Date – this is the date you wish the alert to turn off, if you wish to indicate a date
- Borrower Email – enter if you would like the borrower to also receive an email notification from OB
- Email to CC – any other participants you would like notified such as a realtor, co-borrower, etc.
- Email Signature – you can enter messaging here with your name and phone number if you wish

Click Submit once you have completed all desired fields.

Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

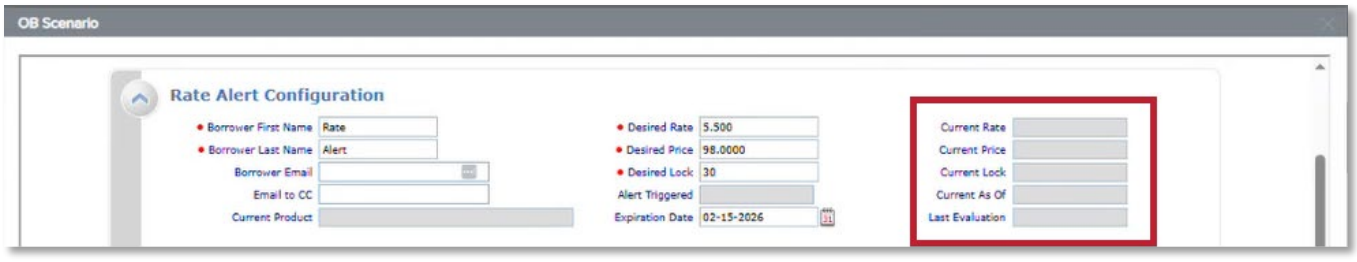
How to Create a Prospect and Pricing Alert



STEP 5

Every business day, the system will check the alerts at 11am and 6pm CT to see if pricing meets or is better than the alert created.

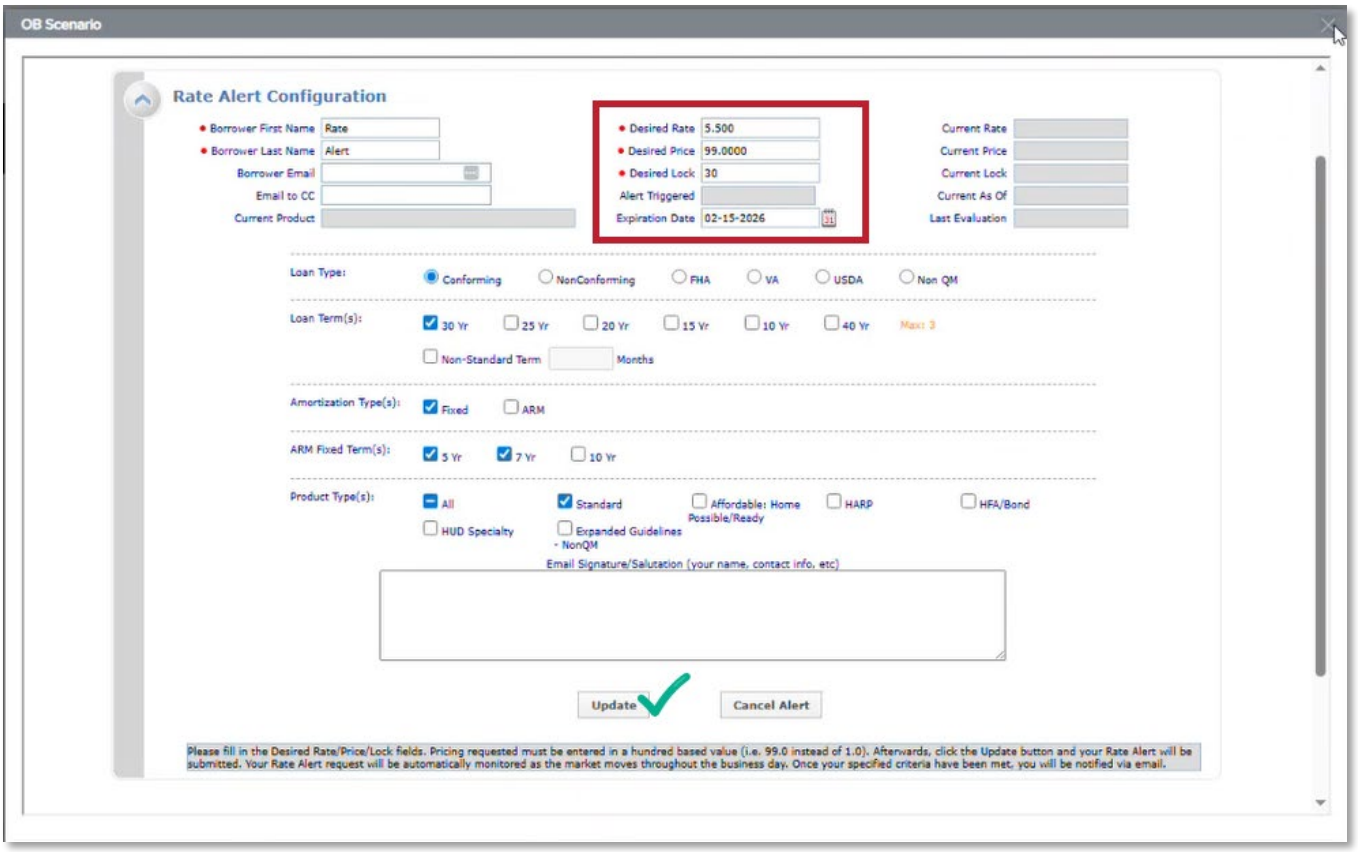
When pricing reaches all 3 of the desired points, an email notification from Optimal Blue will be sent to you and any email address you've entered, and the information located within the grey boxes will be completed.



Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

Updating Pricing Alert

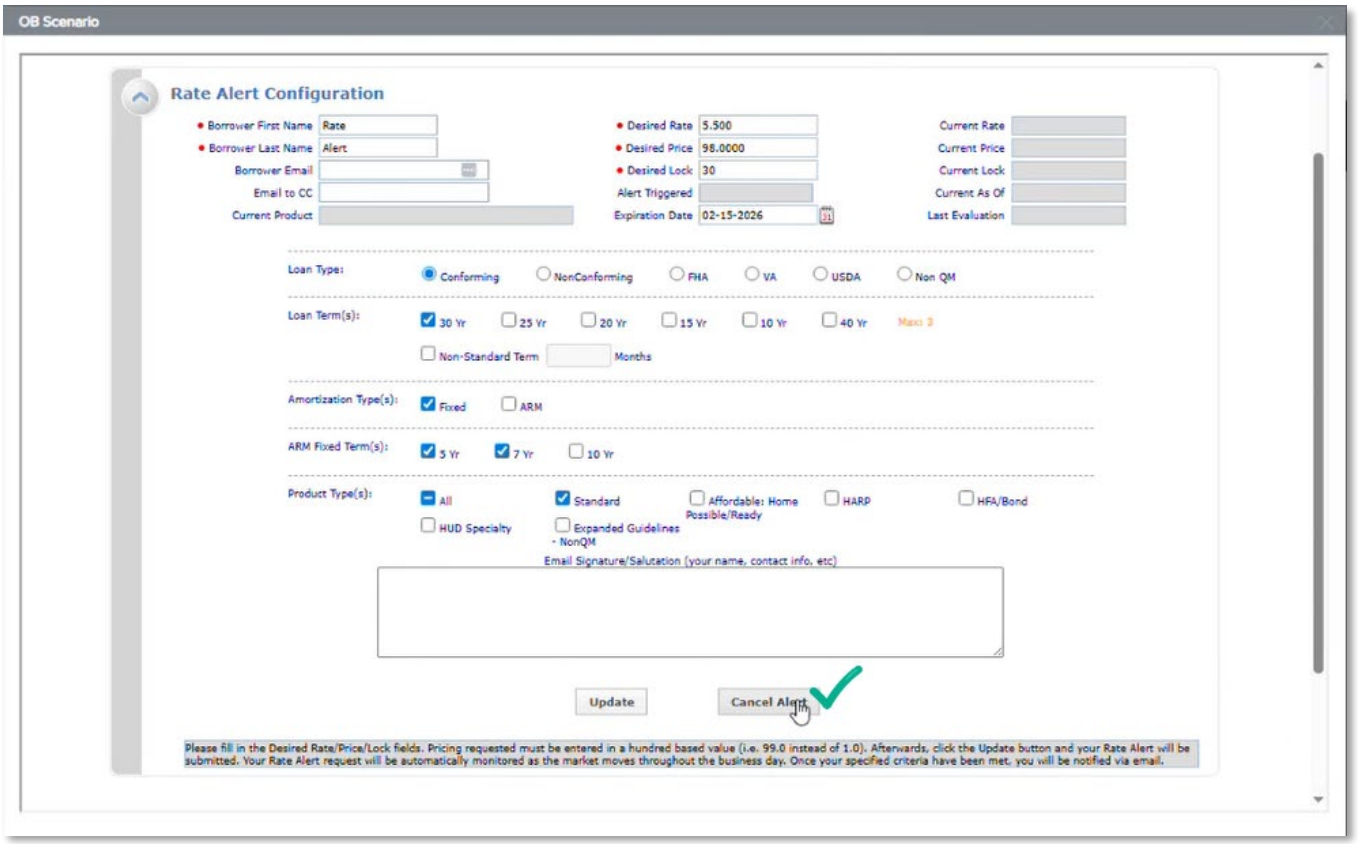
If you wish to make changes to the pricing alert, follow steps 1 and 2 above to get to the pricing alert, then make changes to the information originally entered and click Update



Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.

Cancel Pricing Alert

If you wish to cancel the pricing alert before it expires, or if you did not input an expiration date follow steps 1 and 2 above to get to the pricing alert, then scroll down and click Cancel Alert



Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.