

**BESTX™ MORTGAGE INSURANCE**  
CONFIGURATION GUIDE



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**National**mi.



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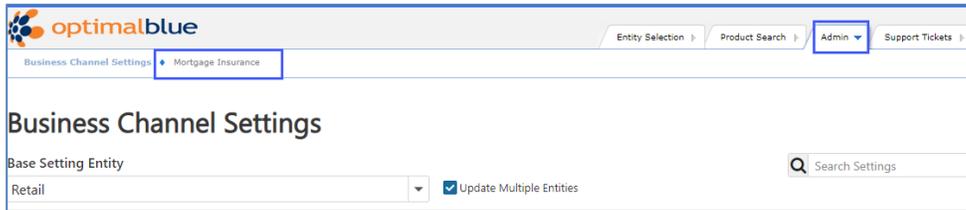
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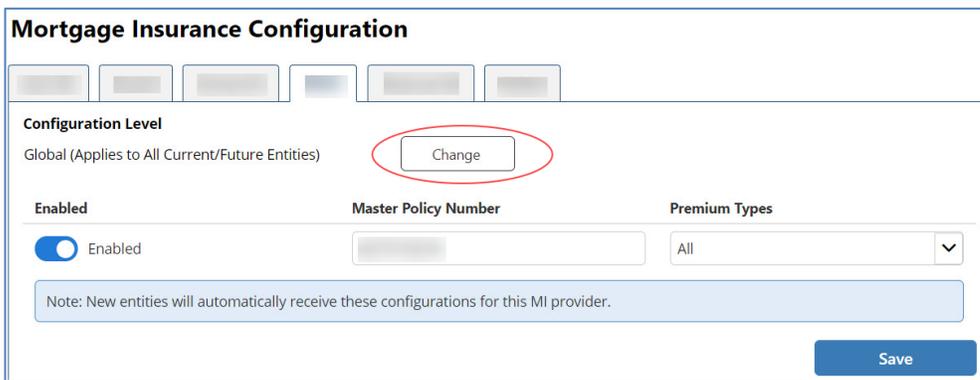
# MORTGAGE INSURANCE CONFIGURATION GUIDE

## Enable Quoting by MI Provider

1. To access the Mortgage Insurance Configuration screen in the Config site, select the **Admin** tab and then the **Mortgage Insurance** link.



The Mortgage Insurance Configuration screen allows users to configure the various mortgage insurance providers and set options for each provider individually.

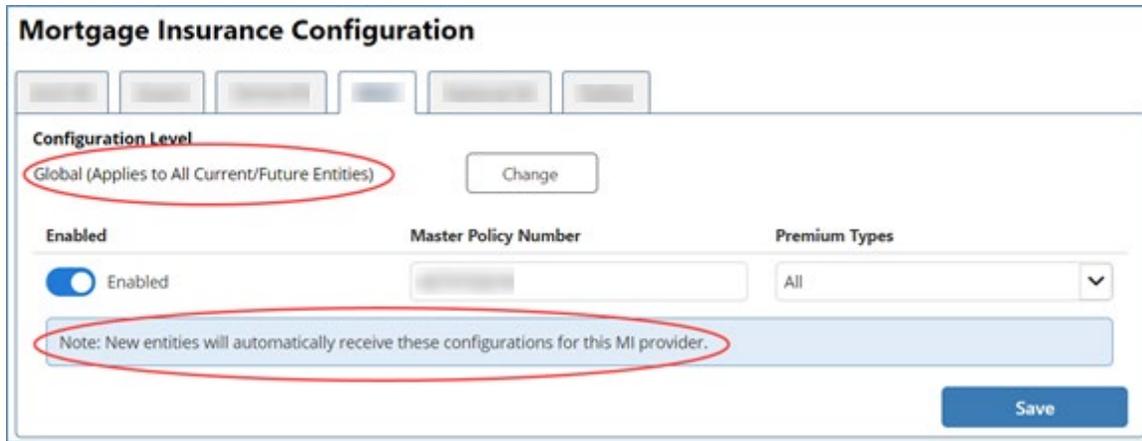


2. Click the tab for the MI provider you wish to configure.
3. Click the **Change** button to switch the configuration level. The configuration level is Global (Applies to All Current/Future Entities) by default. This option will apply the settings to all entities for a single mortgage insurance provider. The Configure by Entity setting, when enabled, will allow different MI options for specific entities for a single mortgage insurance provider. It is most common for lenders to use the global configuration because they only have one MPN (Master Policy Number) per MI Company.



## Global Configuration

Global configuration settings will apply to all entities for the selected MI provider.



1. In the **Enabled** column, slide the button to the right to enable the MI company.
2. Enter the **Master Policy Number** for the MI company. A master policy number is required when enabling a mortgage insurance provider. If the master policy number is not entered, we will disable the configuration when you select the Save button.
3. Select the **Premium Types** you would like to support for the provider; Monthly, Split, Single Premium or Lender Paid.
4. Click the **Save** button.



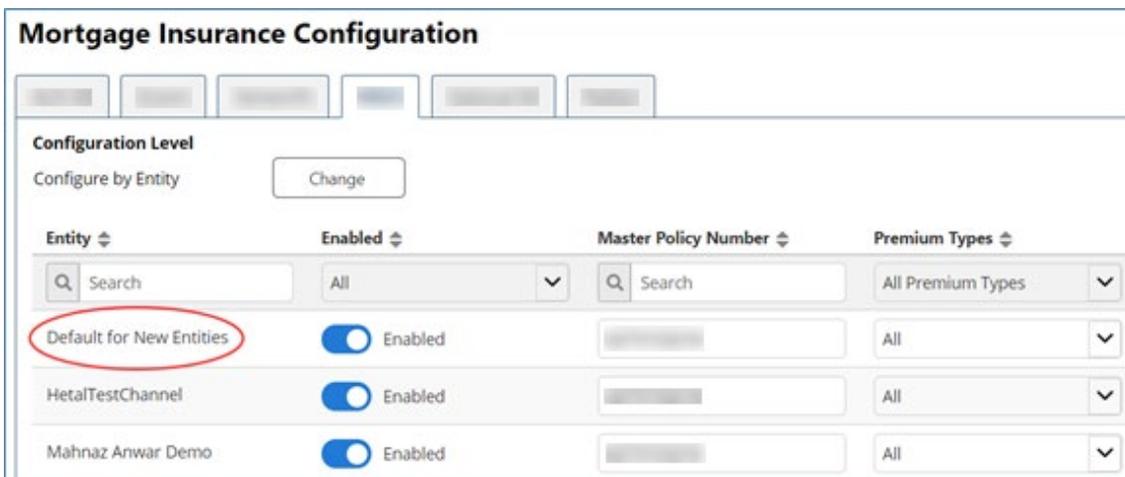
Global settings will apply to any new entity added to your site.

## Entity Level Configuration

MI settings can be configured differently for each entity. Click the **Change** button to select the Configure by Entity option. When changing settings from global to by entity, your global configuration will be copied over to each entity. You can then modify individual entities.



A dialog box titled "Configuration Level" with a close button (X) in the top right corner. It contains two radio button options: "Global (Single Configuration)" which is unselected, and "Configure by Entity" which is selected. At the bottom, there are two buttons: "Cancel" and "Update Configuration Level".

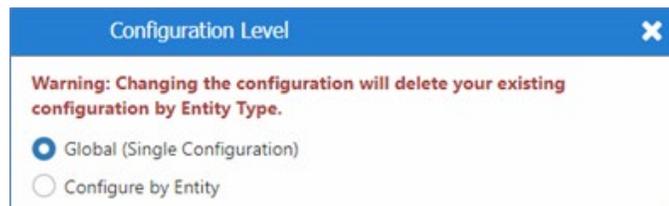


The "Mortgage Insurance Configuration" screen features a "Configuration Level" section at the top with a "Change" button. Below this is a table with columns for "Entity", "Enabled", "Master Policy Number", and "Premium Types". Each column has a search box and a filter dropdown. The "Entity" column lists "Default for New Entities", "HetalTestChannel", and "Mahnaz Anwar Demo". The "Enabled" column shows toggle switches for each, all currently set to "Enabled". The "Master Policy Number" and "Premium Types" columns have input fields and dropdown menus respectively, all currently set to "All". The "Default for New Entities" row is circled in red.

1. Enabling the Default for New Entities will automatically assign a master policy number and premium type to any new entities you set up.
2. Easily search and/or filter for entities or settings with the search and filter options at the top of each column.
3. Enable the MI provider for the applicable entities.
4. Assign a **Master Policy Number** for each entity separately.
5. Select the **Premium Types** to display in results for each entity separately.
6. Click the **Save** button.



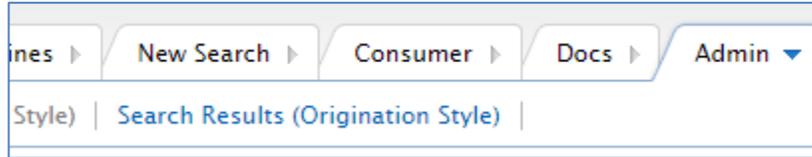
You can change the configuration level by clicking the **Change** button at the top. If you change a current entity level configuration for an MI provider to a single configuration, an alert will notify you that your current settings will be deleted.



A dialog box titled "Configuration Level" with a close button (X) in the top right corner. It displays a warning message in red text: "Warning: Changing the configuration will delete your existing configuration by Entity Type." Below the warning are two radio button options: "Global (Single Configuration)" which is selected, and "Configure by Entity" which is unselected.

## Adding MI Icon to Origination Style Search Results

Make sure to add the MI integration icon to the search results for Origination Style. For Traditional Style search results, the MI integration icon will display without additional configuration.



1. Select the **Admin** tab and then the **Search Results (Origination Style)** link.



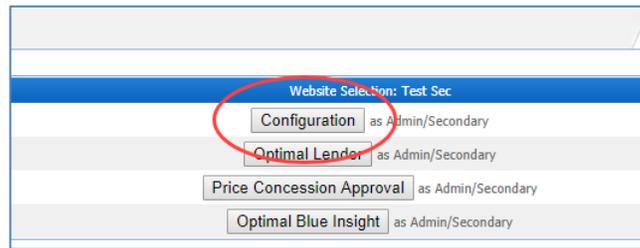
2. Make sure MI is a **Selected Field** in either the Summary or Details section of the results.
3. Click **Update Fields**.

## Entity Type Configuration

Mortgage Insurance rate quotes may vary by origination channel type; Lender, Correspondent or Broker. This designation will be sent to the MI providers based on the entity type assigned to the business channel in the Configuration site. The following entity types are mapped to the origination channels as follows:

- Retail = Lender
- Wholesale = Broker
- Correspondent = Correspondent
- Non-delegated = Correspondent
- Mini-correspondent = Correspondent
- AOT = Correspondent
- Corporate = Lender
- Not Applicable = Lender
- None Selected = Lender

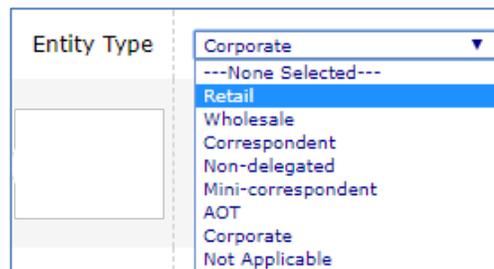
Based on the mapping above, confirm that you have assigned the entity type to your business channels appropriately.



In the Configuration site, select the business channel entity.



Then select the **Entity Preferences** activity. For the **Entity Type**, select the appropriate option from the drop-down menu and save the changes.



## Configuration Report

A configuration report showing the entity and entity type mapping to the origination channel is available from the Configuration and Lender sites.

In the Configuration site, choose the **Configuration Reports** Activity and select the **MI Origination Channel Mapping** option from the **Views** drop-down menu.



Entity	All	
Views	MI Origination Channel Mapping	
Export		
Prev Next		
Entity	Entity Type	Origination Channel
CC Corp	Corporate	Lender
Staging (for OB only)	---None Selected---	Lender
Optimal Advantage	Retail	Lender
Encompass Corp	Corporate	Lender
CC Retail	Retail	Lender
Correspondent	Correspondent	Correspondent
Wholesale	Wholesale	Broker
MI ADMIN TEST	Retail	Lender
Encompass Retail	Retail	Lender
Prev Next		

In Lender, choose the **Configuration Views** link and select the **MI Origination Channel Mapping** option from the **View** drop-down menu.

2ndary | Lock Desk | Changes | Pipelines | New Search | Docs | Admin | Branches

2ndary | 2ndary Loan Export | **Configuration Views** | Reactivate Loan | Reporting | Configuration Site

Ratesheet | Historical Ratesheets

**View Options**

View: **MI Origination Channel Map** | Entity: All | Export

Entity	Entity Type	Origination Channel
CC Corp	Corporate	Lender
CC Retail	Retail	Lender
Correspondent	Correspondent	Correspondent
Encompass Corp	Corporate	Lender
Encompass Retail	Retail	Lender
MI ADMIN TEST	Retail	Lender
Optimal Advantage	Retail	Lender
Staging (for OB only)	---None Selected---	Lender
Wholesale	Wholesale	Broker
Prev Next		