



Live MI Quickstart Guide for Marksman



Initial setup for quoting in Marksman and 3rd party API

Get instant access to live mortgage insurance (MI) quotes from industry leading providers within one platform for a more efficient workflow.

How to set up a new MI provider in Marksman

1. Go to *Settings* as *Administrator*
2. Click *Marksman Settings*
3. Scroll down to the field that says *Available MI Companies* and select the MI companies you would like to add
4. Click *Save*

HomeRatesProspectsProductsReportsHelp

Demo Home Loans

+ Add Selected InvestorsRemove Selected Investors

Excluded Product Categories ?

Agency FHLMC Jumbo 10 Yr Fixed
Agency FHLMC Jumbo 10 Yr Fixed - Tier 1
Agency FHLMC Jumbo 15 Yr Fixed - Tier 1
Agency FHLMC Jumbo 15 Yr Fixed - Tier 2
Agency FHLMC Jumbo 20 Yr Fixed - Tier 1
Agency FHLMC Jumbo 20 Yr Fixed
Agency FHLMC Jumbo 25 Yr Fixed
Agency FHLMC Jumbo 25 Yr Fixed - Tier 1
Agency FHLMC Jumbo 30 Yr Fixed - Tier 1
Agency FHLMC Jumbo 30 Yr Fixed - Tier 2

+ Add Selected Products

Product Categories Chosen for Display ?

Agency FHLMC Jumbo 15 Yr Fixed
Agency FHLMC Jumbo 30 Yr Fixed
Agency FHLMC Jumbo 30 Yr LIBOR ARM 10/1
Agency FHLMC Jumbo 30 Yr LIBOR ARM 5 Yr 2/2/5
Agency FHLMC Jumbo 30 Yr LIBOR ARM 7/1
Agency FNMA Jumbo 10 Yr Fixed
Agency FNMA Jumbo 15 Yr Fixed
Agency FNMA Jumbo 20 Yr Fixed
Agency FNMA Jumbo 30 Yr Fixed
Agency FNMA Jumbo 30 Yr LIBOR ARM 10/1

+ Add Selected to Default ProductsRemove Selected Products

Product Cross Reference

Default FICO Score ?700

FHA County Limit TypeAll Limits

VA County Limit TypeBoth Limits

Allow Users to Change Rounding Options ?☒ yes ☐ no

Allow Users to Create GFE ?☐ yes ☒ no

Allow Users to Create Cost Estimate ?☐ yes ☒ no

Allow Users to use the lead status control. ?☐ yes ☒ no

Require users to input a valid DTI value. ?☐ yes ☒ no

Allow users to use Investor View ?☒ yes ☐ no

Ignore prospect event rules for manually created prospects ?☐ yes ☒ no

Hide rates that are not in 1/8th increments ?☐ yes ☒ no

Available MI Companies
(multiple allowed) ?

Alliance Trust
Yates One

Enable LPMI ?☒ yes ☐ no

Email Campaign and RateTracker Configuration

SMTP Settings ?Update SMTP Settings

Allow Users to Override Settings ?☐ yes ☒ no

Warning: Default server cannot be used for Campaigns or RateTracker

+ Save
Cancel



5. Click the *MI Setup* tab
6. Select a MI company from the list on the left and click *Edit* at the bottom-right of the screen

AMT Alliance Mortgage Trust

Louie Smith | Settings | Send Feedback | Logout

ID | Name | Email | Phone
Enter Tracking ID

HomeRatesProspectsReportsHelp

Customer Account SetupMI SetupCompliance Setup

← Back to Settings

Customer ID ? : 01bank01

Available MI Companies

SelectDescription

...»Alliance MI Trust

»»»Yates One MI

Master Policy Number ?

I agree to the Terms and Conditions

☐

Prevent Pricing For Product/Investor Combinations Not Eligible For MI ?

☐ yes ☐ no

MI Product Order ?

EZ Monthly, Constant, Non-Refundable
Single Premium

Master MI Product List ?

All
EZ Monthly, Constant, Non-Refundab
Single Premium

Lending Institution Type ?

Description ?

Investor ?

All
Citi Correspondent
Demo Home Loans
Merchants Bank of Indiana

Disable This MI Company For Selected Investor(s) ?

☐ yes ☒ no

Available MI Products ?

All
EZ Monthly, Constant, Non-Refundab
Single Premium

Edit Save New

DescriptionInvestorDisable MI CompanyMI ProductsAllow Guaranteed Rate

No records to display



7. Enter your Master Policy Number and click on the words *Terms and Conditions*, read through them
8. Once you accept the Terms and Conditions, click *Save*, and repeat for all applicable MI companies

AMT Alliance Mortgage Trust

Louie Smith | Settings | Send Feedback | Logout

ID | Name | Email | Phone
Enter Tracking ID

HomeRatesProspectsReportsHelp

Customer Account SetupMI SetupCompliance Setup

← Back to Settings

Customer ID ? : 01bank01

Available MI Companies

SelectDescription

...» Alliance MI Trust

...» Yates One MI

Master Policy Number ?

123456

Master MI Product List ?

All
EZ Monthly, Constant, Non-Refundabl
Single Premium

I agree to the Terms and Conditions

Prevent Pricing For Product/Investor Combinations Not Eligible For MI ?

☒ yes ☐ no

MI Product Order ?

EZ Monthly, Constant, Non-Refundable
Single Premium

Description ?

Investor ?

All
Rates One
All Rates Today
Buy Sell Rates

Disable This MI Company For Selected Investor(s) ?

☐ yes ☒ no

Available MI Products ?

All
EZ Monthly, Constant, Non-Refundabl
Single Premium


SaveCancel + Save New

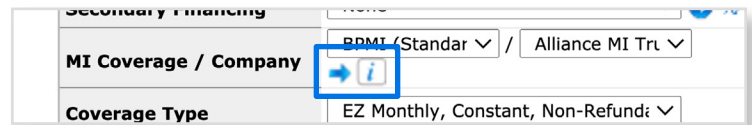
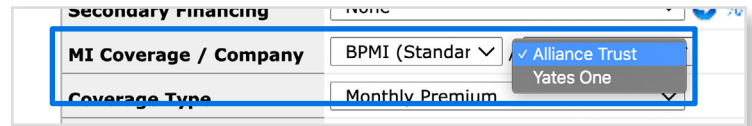
DescriptionInvestorDisable MI CompanyMI ProductsAllow Guaranteed Rate

No records to display



How to request a MI quote in Marksman

1. Log into Marksman and go to the *Rates* page
2. Enter a scenario that applies to MI
(*LTV greater than 80%, etc.*)
3. Select if you want to get a quote from a specific MI company or a Best Ex result from all available MI companies
4. Click *Get Rates*
5. Click  to see MI details



How to Request a MI Quote in 3rd Party API

1. Make sure MI is set up in your Marksman account, reference above steps to activate
2. Send an eligible scenario (*LTV greater than 80%, etc.*) along with parameters ``noMI=0`` and ``pmiCompany=-999``
 - a. ``noMI=0`` is borrower paid, and ``pmiCompany=-999`` is Best Ex of all available
3. The monthly MI premium will be found as ``mortech/results/quote/quote_detail/@monthlyPremium`` in the XML response, the monthly premium will be included in the ``piti`` value of the response as well

If you have additional questions, please contact your Customer Success Manager or email support@mortech-inc.com.