



GETTING STARTED IN  
 MORTGAGECOACH®

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1

**ENTER**

**edge.mortgagecoach.com** in any internet browser.

2

**LOG IN** with your email and password.

If you are not an active Mortgage Coach member, register on the **SIGN UP** tab at the top of your screen.

3

**AGREE** to the Terms and Conditions of our products and **TYPE** in your NMLS registry number.

The complete Terms and Conditions are listed on our website at <http://mortgagecoach.com/terms-of-use/>.

4

**CLICK ON SETTINGS** on the top menu bar to set up your account.

 MORTGAGECOACH

 home

 new client

 new partner

 settings

 help

 sign out



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## CONTACT INFO TAB

On the Contact Info tab, please check and update all of your information.\* Then click on **SAVE**.

The **START NOW** address will appear as a green Start Now button in your live EDGE report. This allows you to direct your clients to your online application or website.

**Start Now**

A walkthrough video is located at <https://youtu.be/f0ACFyKEfks>.

The **CREATE EDGE WIDGET** button allows you to create a widget for easy lead capture.

A walkthrough video is located at <https://youtu.be/hYFjq5lcEy4>.

The screenshot shows the 'Settings Manager' interface for 'MORTGAGECOACH'. The 'Contact Info' tab is selected. The form is titled 'Your Contact Information' and includes the following fields:

- First name: Christine
- Last name: Seo
- \* Email address / Login name: myname@samplemortgage.com
- Company name: Sample Mortgage Company
- Website URL: www.samplemortgage.com
- Start Now address: www.samplemortgage.com (highlighted with a red circle)
- Phone number: (123) 456-7890
- Cell phone number: (123) 111-7777
- Fax number: (123) 222-8888
- License number: NMLS #: 1234
- Other license number: (grayed out)
- Business Address:
  - Street address: 9876 Main St
  - City: Irvine
  - State: California
  - Zip code: 92604
- EDGE API Key: 961c0d0eaf32f
- Buttons: Change Password, Save (highlighted with a red circle), Create EDGE Widget (highlighted with a red circle)

\*The first and last name can only be changed by sending an email to [support@mortgagecoach.com](mailto:support@mortgagecoach.com). Certain restrictions are applicable to name changes to ensure the account is within compliance at all times. Additional field boxes grayed out are a result of a restriction placed on your account by an enterprise account site license.

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## IMAGES TAB

**YOUR HEAD SHOT:** The ideal resolution for your head shot image is 50x75 pixels.\* Click on browse, locate your image file on your computer, and click on open.


**YOUR LOGO:** The ideal resolution for your company logo is 200x50 pixels.\* Click on browse, locate the logo file, and click open.

**EQUAL HOUSING LOGO:** Select the option depending on your company.

Once you are done, click on **CONTACT INFO** tab. Then click on **SAVE**. You can remove any uploaded image by clicking on **CLEAR**.

**Your Images**

Your Head Shot




Ideal resolution: 50 x 75

Browse...

Clear

Your Logo




Ideal resolution: 200 x 50

Browse...

Clear

Equal Housing Logo



☒ Equal Housing Lender  
☐ Equal Housing Opportunity

\* To resize your image, you can use software inherently available on your computer (such as Preview on Apple OS or Windows Photo Gallery on Windows). If you have neither, Paint.NET is free to download on [getpaint.net](http://getpaint.net). If you experience trouble with sizing your image, email [support@mortgagecoach.com](mailto:support@mortgagecoach.com) and request for your image to be resized.

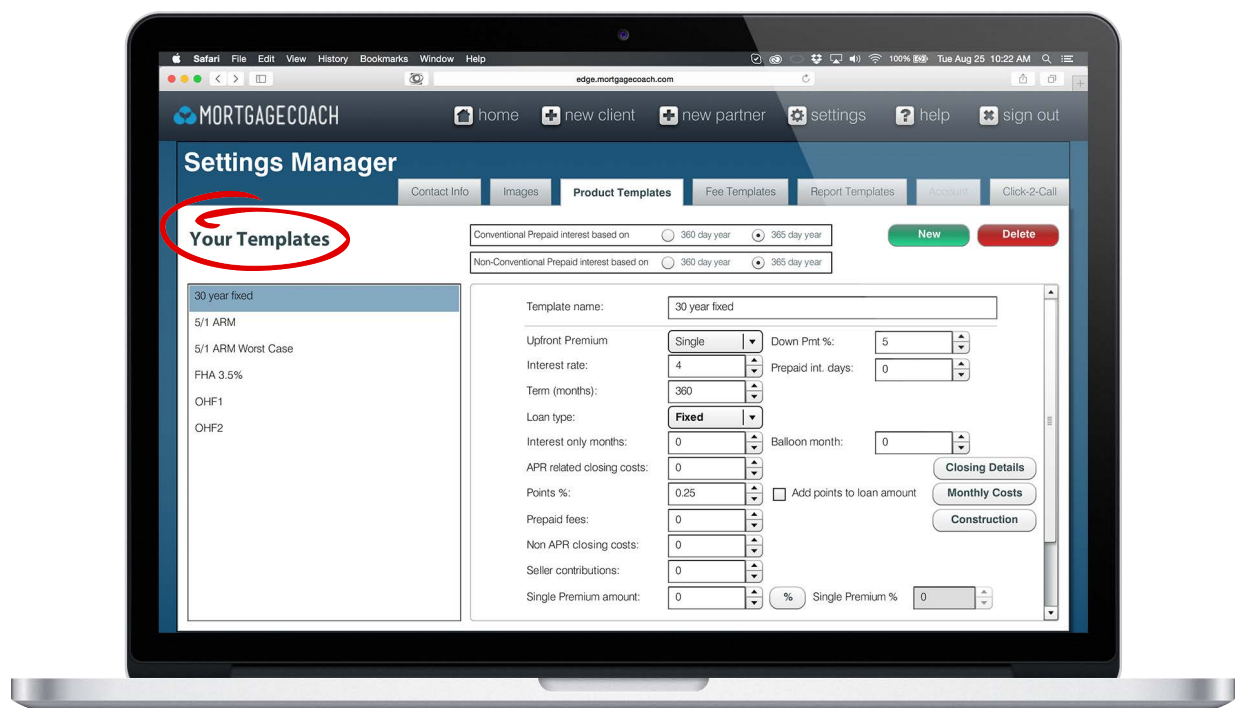
# 7

## PRODUCT TEMPLATES TAB

Create custom templates for your loan scenarios by clicking on the green **NEW** button. Provide complete product scenario details or only basic loan information.

Once your templates are created, you can view and make changes by highlighting the template in the **YOUR TEMPLATES** column on the left.

Delete product templates by highlighting the template and then clicking on the red **DELETE** button. Deleted templates cannot be recovered.



*Corporate Product Templates are not located in the Product Templates Tab.*

*For additional assistance with creating your product and fee templates, an instructional video is available at <https://youtu.be/qjN2ImPsaK0>.*

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## FEE TEMPLATES TAB

Click on the green **NEW** button to create custom fee templates for each loan scenario.

Select on **ADD FEE** or **ADD CUSTOM FEE** to add fees. Create and edit custom fees by clicking on **FEES**.

Make a copy of a fee template by highlighting on a template and clicking on **SAVE AS**. Choose a new title for your template and then select OK.

Delete templates by highlighting on the template and clicking the red **DELETE** button.

To view and make changes, highlight the template in the **LOAN FEE TEMPLATES** column.

**Loan Fee Templates**

Template Name: **California Purchase Fees** State: **California**

Description	Method	Paid By	APR	Add to Loan	PPE
Hazard Insurance Premium	0 % + \$0	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazard Insurance Reserves	0 % + \$0	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
County Property Taxes	0 % + \$0	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escrow Service Fee	0 % + \$750	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recording Fees	0 % + \$125	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processing Fee	0 % + \$495	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional QM Fees	0 % + \$450	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appraisal Fee	0 % + \$495	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Report	0 % + \$20	Borrower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Items marked for APR will carry over to the APR costs field unless they are marked as paid by the borrower or lender. Items where the APR box is unchecked will carry over to the Non-APR unless the PPE box is checked. Items where the PPE box is checked will carry over to the prepaid escrows field and will show up in the APR or Non-APR cost fields. Please do not enter your Upfront MIP or per diem interest in this area as they are already represented on the main closing

APR = Fees that apply to APR. PPE = Prepaid escrows. Add to Loan = Fee will be added to total loan amount

Buttons: **Fees**, **Save As**, **Delete**, **New**, **Add Custom Fee**, **Add Fee**

Corporate Product Templates are not located in the Product Templates Tab.

For additional assistance with creating your product and fee templates, an instructional video is available at <https://youtu.be/qjN2ImPsaK0>.

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## REPORT TEMPLATES TAB

On the Report Templates tab, you can change the default side bar text, description, disclosure text, and other content for each report.

Click on a report template in **YOUR REPORT TEMPLATES** column on the left and make your changes to each report.

To save your changes, go to the **CONTACT INFO** tab and click on **SAVE**.

The **DISCLOSURE TEXT** (footer) box will allow you enter up to 2000 characters. The **EDIT EXTENDED DISCLOSURE** button allows you to enter additional disclosure content.\*

When the client opens any report, a pop-up with the Disclosure Text appears, requiring the client to confirm that they have read and understand the disclosure information.\*\*

\* Please note that changing the Disclosure Text in one report WILL NOT CHANGE the Disclosure Text in your other reports. To display consistent content across reports, go to each report and make the same changes to each.

\*\*If your account is part of an enterprise account, your organization may have set standard disclosures and you may not have the ability to change the information.



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## ACCOUNT TAB\*

Select **CHANGE CREDIT CARD** to change the credit card used for the recurring charges.

\* The Account tab is only open to users who have individual memberships.

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## CLICK-2-CALL TAB

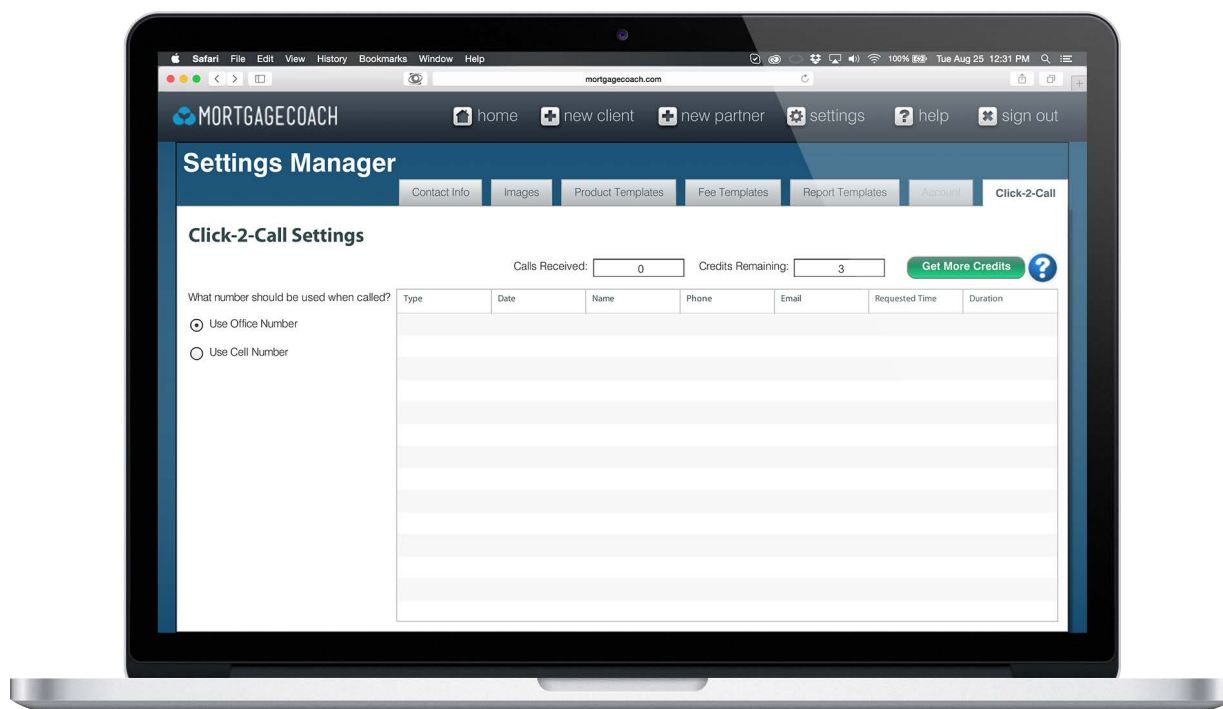
The Click-2-Call allows you to put the "Call Me Now" button on any report.



On the left column, select the number you would like to be notified at. Edit your **OFFICE NUMBER** and your **CELL NUMBER** on the **CONTACT INFO** tab.

The Office Number is the Phone Number field box.

We provide you with 3 free calls to try out. Purchase more credits by clicking on **GET MORE CREDITS**.



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## LOS SETTINGS TAB\*

The LOS Settings Tab is where you can enter in your organization server's settings to transfer data from your organization's server.

Enter in your organization's **LOS**, **VERSION**, **SERVER**, **USER ID**, and **PASSWORD**.

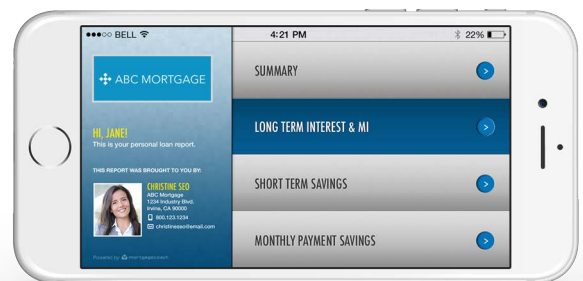
Select on the **TEST CONNECTION** button to confirm the information was entered correctly.

\* If your account is part of an enterprise account site license, your organization may have the option of allowing the users in your organization use the Encompass import feature.

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## VIEW YOUR FINAL PRODUCT

Make sure to view your final report on the Mortgage Coach mobile app.



Additional help can be reached at [support@mortgagecoach.com](mailto:support@mortgagecoach.com), by clicking on **HELP** on your top menu bar, and by going to [mortgagecoach.zendesk.com](https://mortgagecoach.zendesk.com).