

Optimal Blue[®] Configuration Guide

For Administrators

1. Enable Quoting

In Optimal Lender, select the **Admin** tab and then the **MI** option.

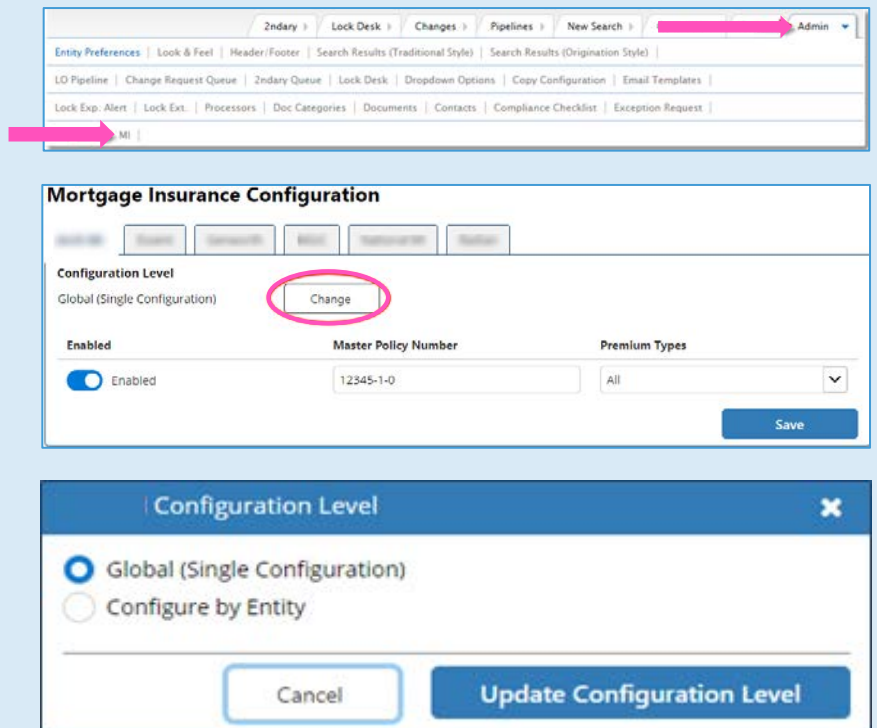
The **Mortgage Insurance Configuration** screen allows users to configure and set options for each provider individually.

Click the tab for the MI provider you wish to configure.

Click the **Change** button to switch the configuration level.

The configuration level is **Global (Single Configuration)** by default. The Global setting will apply to all entities for a single mortgage insurance provider. Lenders commonly use the global configuration because they have only one MPN (Master Policy Number) per MI company.

The **Configure by Entity** setting, when enabled, allows different MI options for specific entities for an MI provider.



2. Global Configuration

In the **Enabled** column, slide the button to the right to enable MGIC.

Enter your **MGIC Master Policy Number** (MPN). The MPN is required to enable mortgage insurance. If not entered, the configuration will be disabled when you select **Save**.

Select the **Premium Types** you would like to support, i.e., Monthly, Split/Buydown, Single Premium or Lender Paid.

Click the **Save** button.

The screenshot shows the 'Mortgage Insurance Configuration' page. At the top, there are navigation tabs: 'Global', 'Entity', 'Advanced', 'MPN', 'Premium', and 'Help'. Below the tabs, the 'Configuration Level' is set to 'Global (Single Configuration)' with a 'Change' button. A pink box highlights the main configuration area, which includes an 'Enabled' toggle set to 'Enabled', a 'Master Policy Number' input field, and a 'Premium Types' dropdown menu. The dropdown menu is open, showing options: 'Monthly', 'Split/Buydown', 'Single Premium', and 'Lender Paid'.

3. Entity Level Configuration (Optional)

MI settings can be configured differently for each entity, if necessary. Click the **Change** button to select the **Configure by Entity** option.

When changing settings from **Global** to **Configure by Entity**, your global configuration will be copied over to each entity. Then, you can modify individual entities.

Easily search or filter for entities or settings with the options at the top of each column.

Enable the MI provider for the applicable entities by sliding the button to the right.

Assign a **Master Policy Number** for each entity separately.

Select the **Premium Types** to display results for each entity separately.

Click the **Save** button.

The screenshot shows a 'Configuration Level' dialog box. It has two radio button options: 'Global (Single Configuration)' (unselected) and 'Configure by Entity' (selected). At the bottom, there are two buttons: 'Cancel' and 'Update Configuration Level'.

The screenshot shows the 'Mortgage Insurance Configuration' page with the 'Configuration Level' set to 'Configure by Entity'. A pink box highlights the main configuration area, which includes a 'Change' button. Below the 'Change' button, there is a table with columns: 'Entity', 'Enabled', 'Master Policy Number', and 'Premium Types'. The table has search bars and dropdown menus for each column. The data rows are as follows:

Entity	Enabled	Master Policy Number	Premium Types
Mahnaz Anwar Demo	Enabled	12345-1-0	All
Staging (for OB only)	Enabled	12345-1-0	All
Optimal Advantage	Enabled	12345-1-0	All
Retail	Enabled	12345-1-0	All

At the bottom right of the table, there is a 'Save' button.

4. Entity Type Configuration

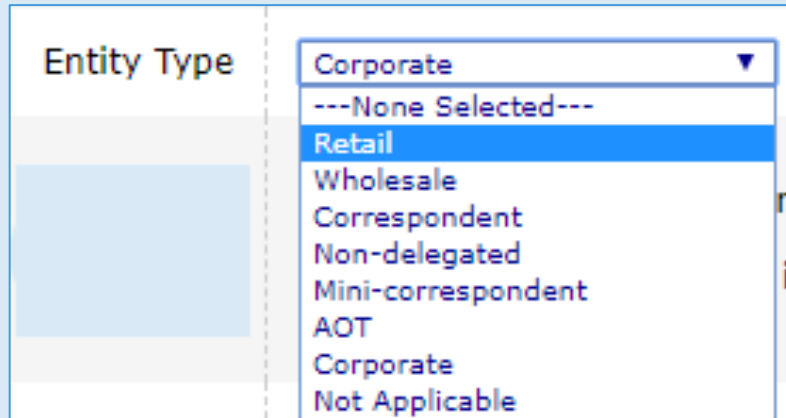
Mortgage insurance rate quotes may vary by origination channel type: Lender, correspondent or broker. This designation will be sent to the MI providers based on the Entity Type assigned to the business channel in the configuration site.

The following Entity Types are mapped to the origination channels:

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

Confirm you have assigned the Entity Type to your business channels appropriately.

From the Configuration screen, select the business channel entity. Then select the **Entity Preferences** activity. For the **Entity Type**, select the appropriate option from the dropdown list and **Save** the changes.



5. Add MI to 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.

Select the **Admin** tab and then the **MI** option.

Make sure MI is in the **Selected Fields** section.

Click **Update Fields**.

