



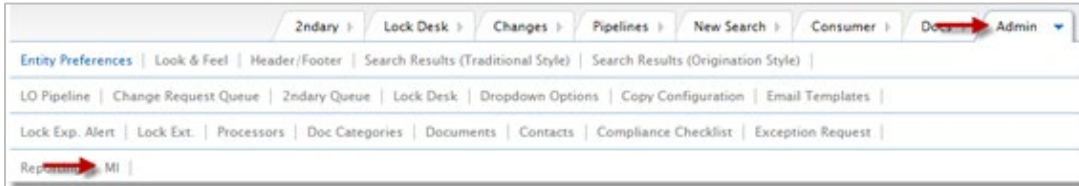
## Optimal Blue Mortgage Insurance Configuration Guide

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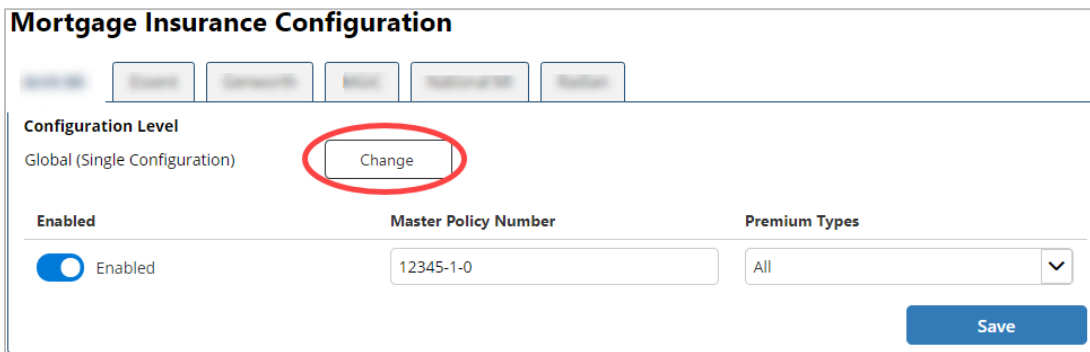
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## Enable Quoting by MI Provider

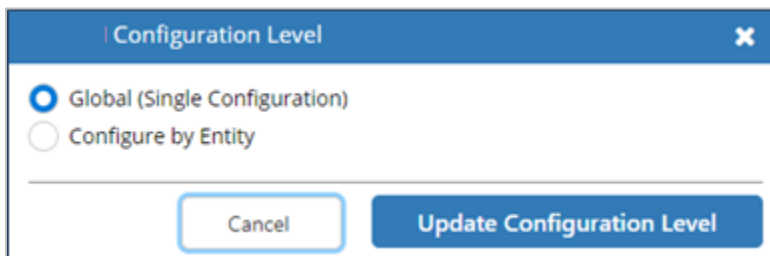
1. In Optimal Blue Lender, select the **Admin** tab and then the **MI** option.



The Mortgage Insurance Configuration screen allows users to configure the various mortgage insurance (MI) 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 (Single Policy) by default. The Global (Single Policy) setting will apply 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 MI provider. It is most common for lenders to use the global configuration because they only have one Master Policy Number per MI Company.



## Global Configuration

### Mortgage Insurance Configuration

Global

Company

Product

State

Market

Region

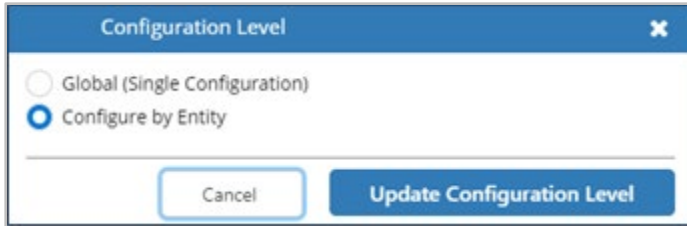
**Configuration Level**  
Global (Single Configuration) Change

Enabled	Master Policy Number	Premium Types
<input checked="" type="checkbox"/> Enabled	<input style="width: 100%;" type="text"/>	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">           Choose <span style="float: right;">▼</span> <ul style="list-style-type: none"> <li><input type="checkbox"/> Monthly</li> <li><input type="checkbox"/> Split/Buydown</li> <li><input type="checkbox"/> Single Premium</li> <li><input type="checkbox"/> Lender Paid</li> </ul> </div>

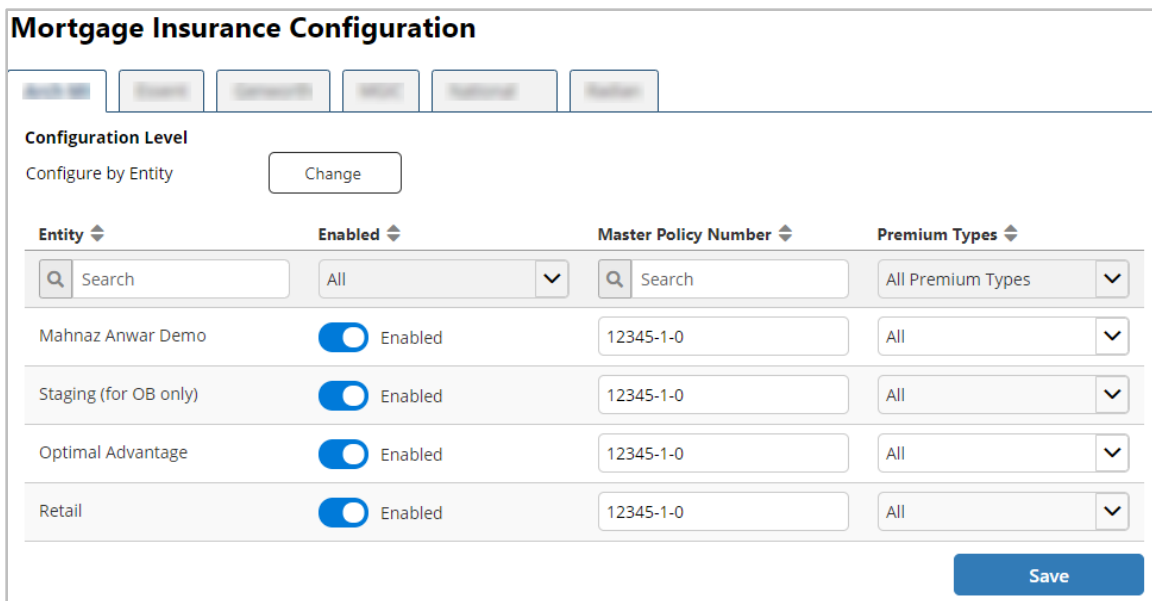
1. In the **Enabled** column, slide the button to the right to enable the MI company.
2. Enter the **Master Policy Number** for the MI company. A master policy number is required when enabling an MI provider. If the Master Policy Number is not entered, we will disable the configuration when you select Save.
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.

## Entity Level Configuration

If necessary, 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 Configure 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".

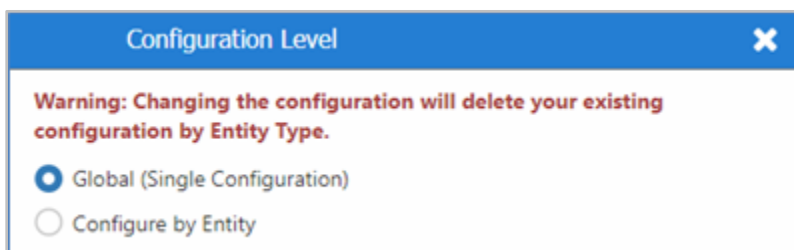


The "Mortgage Insurance Configuration" screen features a navigation bar with buttons for "Home", "Entity", "Company", "MI", "Premium", and "Policy". Below the navigation bar, the "Configuration Level" is set to "Configure by Entity" with a "Change" button. The main area is a table with four columns: "Entity", "Enabled", "Master Policy Number", and "Premium Types". Each column has a search box and a filter dropdown. The table lists four entities: "Mahnaz Anwar Demo", "Staging (for OB only)", "Optimal Advantage", and "Retail". Each entity has an "Enabled" toggle set to "Enabled" and a "Master Policy Number" of "12345-1-0". The "Premium Types" dropdown is set to "All". A "Save" button is located at the bottom right of the table.

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

1. Easily search and/or filter for entities or settings with the search and filter options at the top of each column.
2. Enable the MI provider for the applicable entities.
3. Assign a **Master Policy Number** for each entity separately.
4. Select the **Premium Types** to display in results for each entity separately.
5. Click the **Save** button.

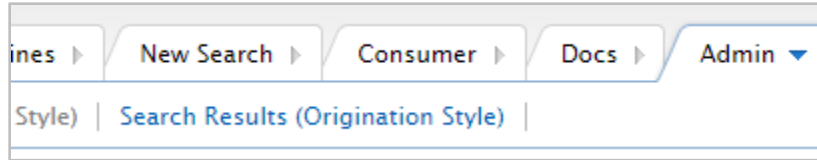
**Note:** You can change the configuration level by clicking the **Change** button at the top.



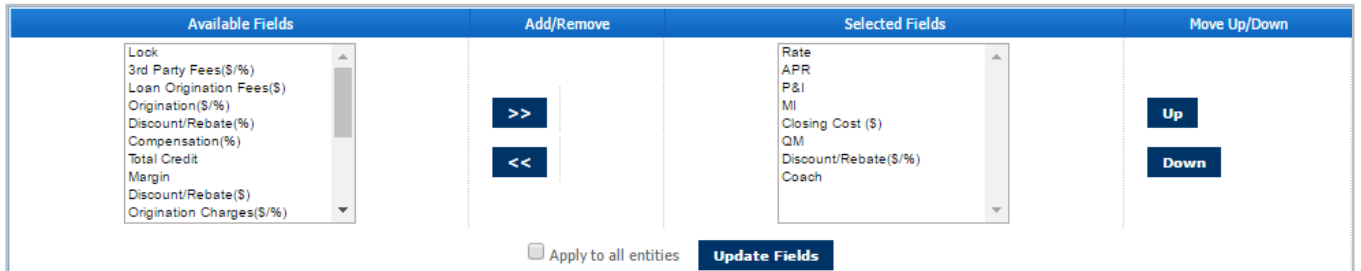
A dialog box titled "Configuration Level" with a close button (X) in the top right corner. It displays a warning message in red text: "Warning: Changing the configuration will delete your existing configuration by Entity Type." Below the warning, there are two radio button options: "Global (Single Configuration)"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

## Add MI to Search Results

Make sure you 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 **MI** option.



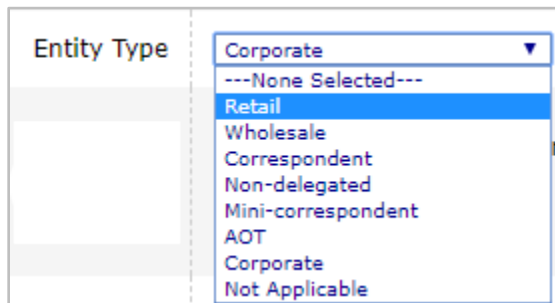
2. Make sure MI is a **Selected Field** in either the Summary or Details section of the results.
3. Click **Update Fields**.

## Entity Type Configuration

MI 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.



From 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 list and save the changes.