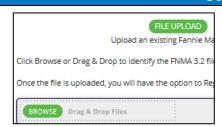


Broker IQ Quick Start Guide

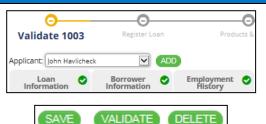


Start a Loan



- 1. Go to: https://brokerig.carringtonwholesale.com/
- Click Start Loan
- 3. Click File Upload
- Click Browse 4.
- Double-click FNM file 5.

Validate 1003



- 1. **Review** the information within each of the 8 Tabs
- 2. Make changes as necessary
- 3. Click Save if changes are made
- Verify that all eight Tabs contain green checkmarks 4.
- 5. Click Validate

Register Loan

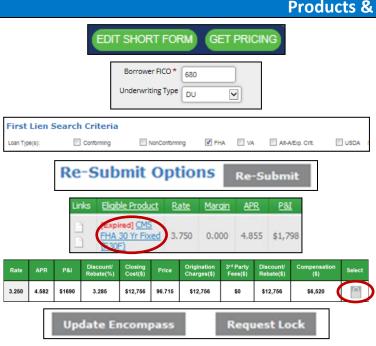


REGISTER

DELETE

- 1. Click Register Loan (yellow link)
- 2. Enter Decision Making FICO Score
- 3. Select the Underwriting Type
- 4. Select the Compensation Source
- 5. Select the LO and Processor
- 6. Enter **Notes** as appropriate
- 7. Click Register (green button)
- 8. Click Ok

Products & Pricing



- 1. Click Products & Pricing
- 2. Click Get Pricing
- 3. Enter Decision Making **FICO** (lowest Borrower)
- 4. Select **Compensation** (Borrower or Lender Paid)
- 5. Verify the **Loan Type**
- 6. Set Lock Period at 45 days
- 7. Designate Manual UW (if applicable)
- 8. Click Re-Submit
 - Revise Search to change loan parameters
- 9. Select the **Product** (click Product Name in blue)
- 10. Click the **Select Basket** next to desired pricing
- 11. Review the Add-ons and Reductions
- 12. Click Request Lock
 - Click Update Encompass (float selected rate)

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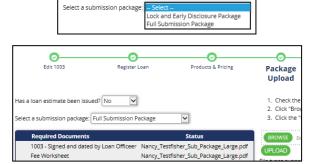


Has a loan estimate been issued? No

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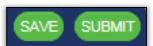
Package Upload



- 1. Click Package Upload
- 2. Select whether Loan Estimate has been issued
- 3. Select Lock & Early Disclosure Package (if locking)
- 4. Click Browse
- 5. Select the **PDF** with all borrower documents
- 6. Check all **Required** boxes
- 7. Click Upload

Review & Submit





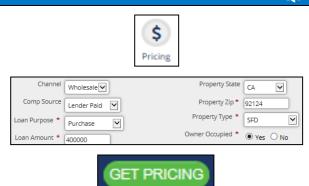
- 1. Click Review & Submit
- 2. Click Submit
- 3. Select Yes to the "Submit this Loan File" pop-up

Upload Conditions



- 1. Click the Upload Documents tab
- 2. Select a Document Type
- 3. Click Upload

Quick Pricer



- 1. Click Pricing icon
- 2. Enter short Loan Parameter fields
- 3. Click Get Pricing
 - Optimal Blue pricing screens will appear

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