



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*

The screenshot displays the 'Marksman Settings' page in a web application. The top navigation bar includes 'Home', 'Rates', 'Prospects', 'Products', 'Reports', and 'Help'. The main content area is divided into several sections:

- Excluded Product Categories ?**: A list of product categories with checkboxes, including 'Agency FHLMC Jumbo 10 Yr Fixed' through 'Agency FHLMC Jumbo 30 Yr Fixed - Tier 2'. A '+ Add Selected Products' button is at the bottom.
- Product Categories Chosen for Display ?**: A list of product categories with checkboxes, including 'Agency FHLMC Jumbo 15 Yr Fixed' through 'Agency FNMA Jumbo 30 Yr LIBOR ARM 10/1'. '+ Add Selected to Default Products' and '- Remove Selected Products' buttons are at the bottom.
- Default FICO Score ?**: A text input field containing '700'.
- FHA County Limit Type**: A dropdown menu set to 'All Limits'.
- VA County Limit Type**: A dropdown menu set to 'Both Limits'.
- Allow Users to Change Rounding Options ?**: Radio buttons for 'yes' (selected) and 'no'.
- Allow Users to Create GFE ?**: Radio buttons for 'yes' and 'no' (selected).
- Allow Users to Create Cost Estimate ?**: Radio buttons for 'yes' and 'no' (selected).
- Allow Users to use the lead status control. ?**: Radio buttons for 'yes' and 'no' (selected).
- Require users to input a valid DTI value. ?**: Radio buttons for 'yes' and 'no' (selected).
- Allow users to use Investor View ?**: Radio buttons for 'yes' (selected) and 'no'.
- Ignore prospect event rules for manually created prospects ?**: Radio buttons for 'yes' and 'no' (selected).
- Hide rates that are not in 1/8th increments ?**: Radio buttons for 'yes' and 'no' (selected).
- Available MI Companies (multiple allowed) ?**: A dropdown menu with a blue border, showing 'Alliance Trust' and 'Yates One' as selected options.
- Enable LPMI ?**: Radio buttons for 'yes' (selected) and 'no'.
- Email Campaign and RateTracker Configuration**: Includes an 'SMTP Settings ?' section with an 'Update SMTP Settings' button, and 'Allow Users to Override Settings ?' with radio buttons for 'yes' and 'no' (selected).

A warning message at the bottom states: 'Warning: Default server cannot be used for Campaigns or RateTracker'. At the bottom right, there are '+ Save' and 'Cancel' buttons.



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

Home Rates Prospects Reports Help

Customer Account Setup **MI Setup** Compliance Setup

← Back to Settings Customer ID ? : 01bank01

Available MI Companies

Select	Description
...	Alliance MI Trust
...	Yates One MI

Master Policy Number ?

Master MI Product List ? All
EZ Monthly, Constant, Non-Refundab
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

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

Description	Investor	Disable MI Company	MI Products	Allow 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

Home Rates Prospects Reports Help

Customer Account Setup MI Setup Compliance Setup

← Back to Settings Customer ID ? : 01bank01

Available MI Companies

Select	Description	Master Policy Number ?	Master MI Product List ?
...>>	Alliance MI Trust	123456	All EZ Monthly, Constant, Non-Refundab Single Premium
...>>	Yates One MI		

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-Refundab
Single Premium

Save Cancel + Save New

Description	Investor	Disable MI Company	MI Products	Allow 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



Secondary Financing: none

MI Coverage / Company: BPMI (Standar) / Alliance Trust (selected), Yates One

Coverage Type: Monthly Premium



Secondary Financing: none

MI Coverage / Company: BPMI (Standar) / Alliance MI Tru (selected)

Coverage Type: EZ Monthly, Constant, Non-Refund: (selected)

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.