

my OPTIGO

Pools Pipeline



Welcome! This training will guide you through the myOptigo® pools pipeline navigation.

Summary:


Pool submission allows all potential loans to be submitted together as part of a pool. Loans can be added to, or removed, from a pool. Users can also perform all loan level status items and sort and filter by pool.

Business Benefit:

myOptigo will implement pool submission & pipeline view that enhance the management of pool loans.

ALL OPPORTUNITIES VIEW
Click the caret symbol next to 'All Opportunities' to open the drop-down menu.

All Opportunities 

Search  + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL STATUS	POOL ID	POOL EXTERNAL DEAL TEAM
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			01- Loan Submitted	04/23/2025						
			02- Quoted	04/23/2025						
			03- Quote Accepted	04/23/2025	E2E Test Team					
			03- Quote Accepted	04/23/2025						
			03- Quote Accepted	04/23/2025	E2E Test Team					
			07- Locked	04/23/2025						
			07- Locked	04/23/2025						
			07- Locked	04/23/2025						
			Draft Created	04/23/2025	E2E Test Team					

1 - 250 of 12602 items

First < 1 2 3 4 5 > Last

250 items per page

Note: Sensitive information has been censored throughout this training module.



All Opportunities ▾

Search [] + CREATE NEW

Standard Views

- All Opportunities ★
- All Pools ☆

ALL OPPORTUNITIES VIEW
Click "All Pools."

NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL STATUS	POOL ID
		512436436	01- Loan Submitted	04/23/2025					
			01- Loan Submitted	04/23/2025					
			01- Loan Submitted	04/23/2025					
			01- Loan Submitted	04/23/2025					
			01- Loan Submitted	04/23/2025					
			01- Loan Submitted	04/23/2025					
			02- Quoted	04/23/2025					
			03- Quote Accepted	04/23/2025	E2E Test Team				
			03- Quote Accepted	04/23/2025					
			03- Quote Accepted	04/23/2025	E2E Test Team				
			07- Locked	04/23/2025					
			07- Locked	04/23/2025					

Note: Sensitive information has been censored throughout this training module.



All Pools

Search + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME
>				03- Quote Accepted	02/14/2025		
>				03- Quote Accepted	02/14/2025		
>				03- Quote Accepted	02/14/2025		
>							
>							
>							
>							
>							
>							
>							

1 - 250 of 1733 items

First < 1 2 3 4 5 >

250 items per page

ALL POOLS VIEW

The view shows all the information related to the chosen pool.

Click on the numbers by "items per page" to adjust amount of items shown in current view.

Note: Sensitive information has been censored throughout this training module.

All Pools ▾

Search [] + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME
▾				03- Quote Accepted	02/14/2025		
				03- Quote Accepted	02/14/2025		
				03- Quote Accepted	02/14/2025		
>							
>							
>							
>							
>							
>							
>							
>							
>							

Columns
Filters
Export

1 - 250 of 1733 items

First < 1 2 3 4 5 > Last

ALL POOLS VIEW
Adjust the amount of items to view as desired.

50
100
150
200
250 ✓
250 items per page

Note: Sensitive information has been censored throughout this training module.

ALL POOLS VIEW
Use the "Search" bar to search for pools.

All Pools ▾

Search + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME
▾				03- Quote Accepted	02/14/2025		
				03- Quote Accepted	02/14/2025		
				03- Quote Accepted	02/14/2025		
>							
>							
>							
>							
>							
>							
>							
>							

Columns Filters Export

Note: Sensitive information has been censored throughout this training module.



All Pools

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE S	BRANCH NAME
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>						
>						
>						
>						
>						
>						
>						

ALL POOLS VIEW
 Click the "Columns" tab to view additional information about the pools in the pipeline.

- Columns
- Filters
- Export

Note: Sensitive information has been censored throughout this training module.

All Pools

Search + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>						
>						
>						
>						
>						
>						
>						

ALL POOLS VIEW
 Additional pool information will appear, including City, State, loan status, loan amount and more.
 Click the "Filters" tab.

Search...

- Columns
- Filters
- Export
- OPPORTUNITY
 - Opportunity Name
 - Opportunity Id
 - Loan #
 - Status
 - Date Submitted
 - External Deal Team
 - Optigo Lender Branch Name
- POOL
 - Pool Name
 - Pool Status
 - Pool ID
 - Pool External Deal Team
- PROPERTY
 - City
 - State
 - Property Name

Note: Sensitive information has been censored throughout this training module.



All Pools

Search + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>				03- Quote Accepted	02/14/2025	
>						
>						
>						
>						
>						
>						
>						
>						
>						

Search...

- OPPORTUNITY
 - OPPORTUNITY NAME
 - OPPORTUNITY ID
 - LOAN #
 - STATUS
 - DATE SUBMITTED
 - EXTERNAL DEAL TEAM
 - OPTIGO LENDER BRANCH NAME
- POOL
 - POOL NAME
 - POOL ID
 - POOL STATUS
 - POOL EXTERNAL DEAL TEAM

ALL POOLS VIEW
 Apply needed filters to the pipeline columns as needed.
 Click "Export" to download a copy of the pipeline data.

Note: Sensitive information has been censored throughout this training module.



File Home Insert Page Layout Formulas Data Review View Automate Help

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color, Paragraph Spacing, Bullets, Numbering, Merge & Center

Alignment: General, Text Alignment, Orientation, Indentation, Merge & Center

Number: Currency, Percentage, Thousand Separator, Decimal Places, Rounding

Styles: Normal, Bad, Good, Neutral, Calculation, Check Cell

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Add-ins: Add-ins, Analyze Data

Comments, Share

U24

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Opportunity Name	Opportunity id	Loan #	Product	Status	Date Submitted	Pool Name	Pool ID	Pool Status	Pool External Deal Team	City	State	Property Name	
2	Opportunity 1			Conventional	03- Quote Accepted	8/21/2023 15:33					Arlington	VA		
3	Opportunity 2			Conventional	Draft Created	8/17/2023 15:04					Arlington	VA		
4	Opportunity 3			Conventional	Draft Created	12/19/2023 11:56					Arlington	VA		
5	Opportunity 4			Conventional	01- Loan Submitted	9/9/2022 11:07					Arlington	VA		
6	Opportunity 5			Conventional	01- Loan Submitted	9/8/2020 16:18					Arlington	VA		
7	Opportunity 6			Conventional	01- Loan Submitted	10/21/2021 14:25					Arlington	VA		
8	Opportunity 7			Conventional	Draft Created	9/7/2023 14:42					Arlington	VA		
9	Opportunity 8			Conventional	01- Loan Submitted	10/21/2023 11:50					Arlington	VA		
10	Opportunity 9			Conventional	01- Loan Submitted	10/9/2020 8:36					Arlington	VA		
11														
12														
13														
14														
15														
16														
17														
18														
19														

PIPELINE EXPORT

Once downloaded, an Excel export similar to this view will provide the filtered pipeline data results.

Note: Sensitive information has been censored throughout this training module.



my OPTIGO

Pools Submission



Welcome! This training will guide you through the myOptigo® pool submission.

Summary:

Pool submission allows all potential loans to be submitted together as part of a pool. Loans can be added to, or removed, from a pool. Users can also perform all loan level status items and sort and filter by pool.

Business Benefit:

myOptigo will implement pool submission & pipeline view that enhance the management of pool loans.

All Pools

Search + CREATE NEW

GROUP - POOL NAME	OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH N	Opportunity
-------------------	------------------	----------------	--------	------------	--------------------	--------------------	------------------------	-------------

Opportunity

Pool

ALL POOLS VIEW

To initiate the pool submission process, click "+Create New."

Select "Pool" from the drop-down menu.

Note: Sensitive information has been censored throughout this training module.



← BACK

Create New Pool

- POOL SUMMARY
- BROKER
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Pool Details

OVERVIEW

External Team Members

No deal team members.

CREATE NEW POOL

Populate all required fields.

Note: When Deal Team is selected, 'External Team Members' information will populate automatically.

Click 'Save & Next' once complete. Button will only be enabled once all fields are filled out.



Note: Sensitive information has been censored throughout this training module.

← BACK
Create New Pool

- POOL SUMMARY
- BROKER
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Pool Details


OVERVIEW

Pool Name* Deal Team Originator First Name* Originator

SAVE & NEXT

External Team Members

Submitter 2	Loan Submitter
Underwriter 3	Underwriter
Pilot CTE1	Loan Submitter, Underwriter

×


You will no longer be able to edit these fields after clicking 'CONFIRM'. Are you sure you would like to continue?

CREATE NEW POOL

Click "Confirm."

Note: Once confirmed, this information cannot be edited and the next section will automatically appear.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- POOL SUMMARY
- BROKER**
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Broker Details

Brokered Transaction?*

- No
- Yes

Broker First Name*

Broker Middle Name

Broker Last Name*

Broker Company*

Please mark as checked if the mortgage broker identifies with one or more of the following categories

- Minority, Women, and Disabled-Owned Businesses
- Minority Depository Institutions ("MDIs") on the list maintained by the FDIC
- Community Development Financial Institutions ("CDFIs") certified by the US Department of Treasury
- Small Financial Institutions ("SFIs") - any firm with less than \$10 billion in total assets that is engaged in the multifamily business
- None of the Above

BROKER SCREEN

Populate all required fields.

Click "Save & Next" to continue.

SAVE & NEXT

Note: Sensitive information has been censored throughout this training module.

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Figma Example

- POOL SUMMARY
- BROKER
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Broker Details

SAVE & NEXT

Brokered Transaction?*

- No
- Yes

Broker First Name *


Broker Middle Name

Broker Last Name *

Broker Company *

Please mark as checked if the mortgage broker identifies with one or more of the following categories

- Minority, Women, and Disabled-Owned Businesses
- Minority Depository Institutions ("MDIs") on the list maintained by the FDIC
- Community Development Financial Institutions ("CDFIs") certified by the US Department of Treasury
- Small Financial Institutions ("SFIs") - any firm with less than \$10 billion in total assets that is engaged in the multifamily business
- None of the Above

×


You will no longer be able to edit these fields after clicking 'CONFIRM'. Are you sure you would like to continue?

CANCEL
CONFIRM

CREATE NEW POOL

Click "Confirm."

Note: Once confirmed, this information cannot be edited and the next section will automatically appear.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- POOL SUMMARY
- BROKER
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Borrower Principals

[+ NEW BORROWER PRINCIPAL](#) [SAVE & NEXT](#)

Primary

Type of Borrower
Entity

Entity Name * Select Role *

Country * City * State *

United States

Repeat Borrower Prin... % Interest Owned **Guarantor** Net Worth Liquidity Contigent Liabilities

Please indicate at least one Guarantor before proceeding

BORROWER PRINCIPALS SCREEN

Populate all required fields.

Note: Up to five borrower principals can be submitted and at least one must be a guarantor.

Click "Save & Next" to continue.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- BORROWER PRINCIPALS**
- SCENARIOS
- LINKED OPPORTUNITIES

Borrower Principals

Primary

Type of Borrower: Entity

Entity Name *: Bob

Select Role *: General Partner

Country *: United States

City *: McLean

State *: VA - Virginia

Repeat Borrower Prin...: [dropdown]

% Interest Owned: [input]

Guarantor: Yes

Net V: [input]

+ NEW BORROWER PRINCIPAL SAVE & NEXT

Warning dialog box with a yellow triangle icon and text: "You will no longer be able to edit these fields after clicking 'CONFIRM'. Are you sure you would like to continue?"

Buttons: CANCEL, CONFIRM

BORROWER PRINCIPALS SCREEN

Click "Confirm."

Note: Once confirmed, this information cannot be edited and the next section will automatically appear.

Note: Sensitive information has been censored throughout this training module.

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Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Pool Scenarios

+ NEW POOL SCENARIO SAVE & NEXT

SCENARIOS SCREEN
Populate all required fields.
Click "+New Pool Scenario" to continue.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- SCENARIOS**
- LINKED OPPORTUNITIES

Pool Scenarios

+ NEW POOL SCENARIO **SAVE & NEXT**

Scenario Name*
Figma Test

Loan Term (months)*
12

Interest Rate Type*
Fixed

Prepayment Structure*
Non Standard Defeasa...

Scenario Name*

Loan Term (months)*

Interest Rate Type*

Prepayment Structu...

SCENARIOS SCREEN

Note: Up to eight scenarios can be submitted.

Click "Save & Next" to continue.

Note: Sensitive information has been censored throughout this training module.

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Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

Pool Scenarios


+ NEW POOL SCENARIO SAVE & NEXT

Scenario Name*
Figma Test

Loan Term (months)*
12

Interest Rate Type*
Fixed

Prepayment Structure*
Non Standard Defeasa...

×


You will no longer be able to edit these fields after clicking 'CONFIRM'. Are you sure you would like to continue?

SCENARIOS SCREEN

Click "Confirm."

Note: Once confirmed, this information cannot be edited and the next section will automatically appear.

Note: Sensitive information has been censored throughout this training module.

← BACK

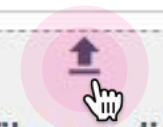
Figma Example

- POOL SUMMARY
- BROKER
- BORROWER PRINCIPALS
- SCENARIOS
- LINKED OPPORTUNITIES

LINKED OPPORTUNITIES SCREEN
To upload files, drag and drop or double click to find the files on your desktop.

Linked Opportunities

SUBMIT



Drop your files or click to browse

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

SUBMIT

Linked Opportunities

↑
Drop your files or click to browse

Status	Opp ID	Loan ID	File Name	Property Name	Product Type	Product Sub-Type	Pool	Funding Type	Loan Purpose
New			Copy of Conventional LST.xlsm	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Items per page: 10 0 of 0 << >>

LINKED OPPORTUNITIES SCREEN
 Populate all fields.
 Scroll to the right for rest of the fields.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

Linked Opportunities

SUBMIT

↑
Drop your files or click to browse

Status	Opp ID	Loan ID	Funding Type	Loan Purpose	Specialized Asset Type	Loan Type	Loan Sub Type	Lender Branch	Action
New			Immediate	Acquisition	Standard	Standard	N/A		<div style="border: 1px solid black; padding: 2px 5px; display: inline-block;">UPLOAD</div>

Items per page: 10 0 of 0

LINKED OPPORTUNITIES SCREEN
Once complete, click "Upload" for each file.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

Linked Opportunities

SUBMIT

↑
Drop your files or click to browse

Status	Opp ID	Loan ID	Funding Type	Loan Purpose	Specialized Asset Type	Loan Type	Loan Sub Type	Lender Branch	Action
Draft	20013729		Immediate	Acquisition	Standard	Standard	N/A		REVIEW

Items per page: 10 1 - 1 of 1

LINKED OPPORTUNITIES SCREEN

After a file is uploaded, the status will change to “Draft.”

Click “Review” for each upload to review information and errors.

Note: Sensitive information has been censored throughout this training module.

←BACK

Property (Opp ID: 20013729)

OPPORTUNITY DETAILS

Total Errors	6
Transaction Data	2
Property Data	1
Borrower Data	2
Property Mgmt Data	✓
Sources and Uses	✓
Quote Scenario	1
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

Transaction Data

Transaction Details

Seller Loan #

Purchase Price Purchase price must be greater than zero for acquisitions

Anticipated Closing Date Anticipated closing date is required for Acquisitions

Seller of the Property

Current Status of Purchase

Earnest Money Non-Ref. Date

Deal Party details

Originator First Name: John

Originator Last Name: smith

Is this a mortgage broker transaction? No

Cancel Save for Later Check & Send

OPPORTUNITY DETAILS

The "Transaction Data" tab will open automatically. Previously entered Originator and Broker data is auto-populated and cannot be edited at the bottom of the screen.

Information previously populated in all sections is auto-populated and cannot be edited, as shown in the grayed-out boxes.

Address any errors and/or fill out additional fields as needed.

Note: Sensitive information has been censored throughout this training module.

←BACK

Property (Opp ID: 20013729)

OPPORTUNITY DETAILS

Total Errors	0
Transaction Data	✓
Property Data	✓
Borrower Data	✓
Property Mgmt Data	✓
Sources and Uses	✓
Quote Scenario	✓
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

Transaction Data

Cancel Save for Later **Check & Send**

Transaction Details

Seller Loan #

Purchase Price: \$1,000,000.00 Anticipated Closing Date: 4/23/2025

Current Status of Purchase Earnest Money Non-Ref. Date

Deal Party details

Originator First Name: John Originator Last Name: smith

Is this a mortgage broker transaction? No

OPPORTUNITY DETAILS

Once all errors are addressed, green checks will appear beside every tab.

Click "Check & Send."

Note: You must address all errors before you can proceed to the next page

https://my-npcte.optigo.com/dls/view/20013729/transaction-details

Note: Sensitive information has been censored throughout this training module.

←BACK

Property (Opp ID: 20013729)

OPPORTUNITY DETAILS

Total Errors	0
Transaction Data	✓
Property Data	✓
Borrower Data	✓
Property Mgmt Data	
Sources and Uses	
Quote Scenario	
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

Transaction Data

Transaction Details

Seller Loan #

0,000.00

Current Status of Purchase

Earnest Money Non-Ref. Date

Deal Party details

Originator First Name: John

Originator Last Name: smith

Is this a mortgage broker transaction? No

Buttons: Cancel, Save for Later, Check & Send

SUBMISSION

A message will pop up to confirm submission.

✓

Thanks for your submission!
 Processing may take longer for properties with high unit counts.
 There is no need to resubmit. Freddie Mac support will contact you if any further action is required.

[Back to Dashboard](#)

Note: Sensitive information has been censored throughout this training module.

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Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

Linked Opportunities

↑
Drop your files or click to browse

SUBMIT

LINKED OPPORTUNITIES SCREEN

The status will be changed to "Locked" for all successfully submitted opportunities.

Once all opportunities are in "Locked" status, click "Submit."

Note: You cannot submit until the status of all opportunities are "Locked."

Status	Opp ID	Loan ID	Funding Type	Loan Purpose	Specialized Asset Type	Loan Type	Loan Sub Type	Lender Branch	Action
Locked	20013729	512436525	Immediate	Acquisition	Standard	Standard	N/A		

Items per page: 10 | 1 - 1 of 1 | < >

ADDING A LOAN TO THE POOL

Note: To add a loan to a pool, the lender needs to submit the loan as an individual opportunity and notify the FM Producer of the Loan Number or Opportunity ID.

REMOVING A LOAN FROM THE POOL

Note: To remove a loan, Lender needs to notify FM Producer of which loan(s) to remove.

Note: Sensitive information has been censored throughout this training module.


← BACK

Figma Example

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- ✓ LINKED OPPORTUNITIES

Linked Opportunities

Status	Opp ID	Loan ID	Funding Type	Loan Purpose	Specialized Asset Type	Loan Type	Loan Sub Type	Lender Branch	Action
Locked	20013729	512436525	Immediate	Acquisition	Standard	Standard	N/A		



Thanks for your submission.

[Back to Dashboard](#) [Close](#)

Items per page: 10 1 - 1 of 1

POOL SUBMISSION

A message will pop up to confirm pool submission.

Note: Sensitive information has been censored throughout this training module.

my OPTIGO

Shell Pool



Welcome! This training will guide you through the myOptigo® shell pools submission.

Summary:

Pool submission allows all potential loans to be submitted together as part of a pool. Loans can be added to, or removed, from a pool. Users can also perform all loan level status items and sort and filter by pool.

Business Benefit:

myOptigo will implement pool submission & pipeline view that enhance the management of pool loans.

← BACK

Figma Example Pool Shell

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

Linked Opportunities

SUBMIT

↑
Drop your files or click to browse

SHELL POOL

Lender may upload a shell pool, in which producers will add previously individually submitted loans to a pool.

Click "Submit" without any LST files at this step to create the shell pool for the producer.

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example Pool Shell

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- LINKED OPPORTUNITIES

Linked Opportunities

SUBMIT

⚠ Submit Empty Pool? ✕

You are submitting a pool without any loans attached to it. Are you sure you want to do this?

SHELL POOL

Click "Confirm."

Note: Sensitive information has been censored throughout this training module.

← BACK

Figma Example Pool Shell

- ✓ POOL SUMMARY
- ✓ BROKER
- ✓ BORROWER PRINCIPALS
- ✓ SCENARIOS
- ✓ LINKED OPPORTUNITIES

Linked Opportunities

✓
Thanks for your submission.
[Back to Dashboard](#) [Close](#)

SHELL POOL SUBMISSION
A message will pop up to confirm shell pool submission.

Note: Sensitive information has been censored throughout this training module.



You have reached the end of this training.