



Canadian Mortgage Technology

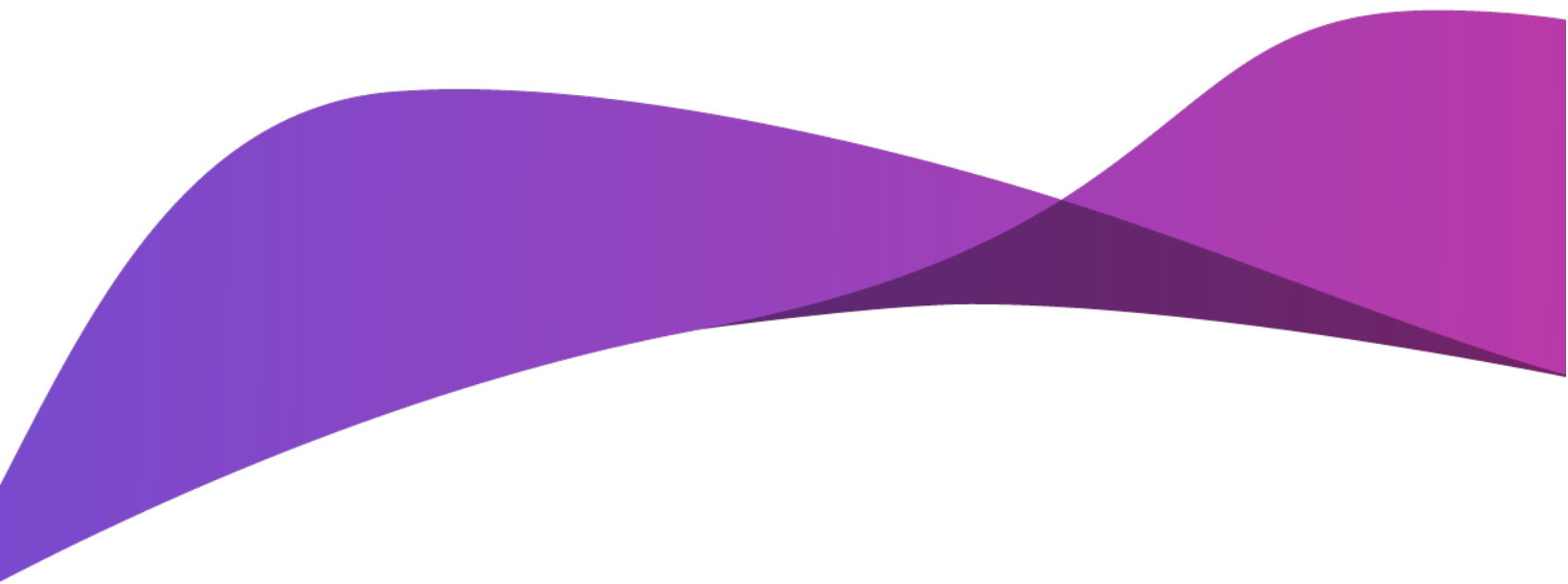
Filogix Expert Release Notes

Release "EB 21.2"

Release Date: June 19, 2021

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Overview

The June 2021 Expert Broker release includes various enhancements and maintenance fixes including:

- Changes to support Expert Pro originated applications
- Various updates within the existing Service Contract form for Quebec users
- Genworth rebranding to 'Sagen'
- Additional Filogix rebranding updates

Special Note: Everyone using Filogix Expert MUST clear your browser cache after the release. Instructions for clearing your browser cache are available from the Expert sign-on page and by accessing the provider's support sites using the links below:

Internet Explorer:

<https://support.microsoft.com/en-ca/help/260897/how-to-delete-the-contents-of-the-temporary-internet-files-folder>

Firefox :

<https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>

Chrome :

https://support.google.com/chrome/answer/2392709?hl=en&ref_topic=7438008&co=GENIE.Platform%3DDesktop&oco=1

Changes to Support Expert Pro Originated Applications

Earlier this year, Filogix launched a new product called Expert Plus/Pro that has the functionality of Expert Broker along with some additional features such as a Customer Relationship Management solution, a Customer Portal and the ability for customers to upload documents directly. For more information, please visit our website <https://www.finastracanada.com/filogix-expert/>

Expert Broker users who want to take advantage of this new product will have their mortgage applications seamlessly synchronized into Expert Broker so that all historical and new applications are in a single database in order to satisfy brokerage operational needs, such as payroll.

Applications that you create in Expert Pro will automatically sync with Expert Broker. In order to ensure data integrity between the two systems, updates to the following information in Expert Pro will automatically update the application in Expert Broker:

- Application Status
- Applicant Information
- Subject Property
- Down Payment
- Mortgage Details
- Agent / Submission Agent Details
- Lender Submissions
- Lender Responses
- Internal Notes
- Fee Details

You are also able to perform the following actions in Expert Broker for these applications:

- ✔ Copy an application
The new application will no longer be linked to Expert Pro (any update from Pro will be sent to the original application in Expert Legacy)
The new copied application will not be view only and can be updated, submitted to a lender, etc.
- ✔ Modify fields on the Participants page (other than Agent / Submission Agent)
- ✔ View your application summary
- ✔ Access Scotia Insurance page for applications submitted to Scotiabank
- ✔ View the Expert Legacy's history of the application (when updates were received from Expert Pro, etc)
- ✔ Continue to use Exchange for your mortgage documents

The following actions are not available in Expert Broker for Expert Pro originated applications:

- ✘ Appraisal orders
- ✘ MPP Orders (these can be processed in Expert Pro)
- ✘ Credit Bureaus (these can be ordered in Expert Pro)
- ✘ Commissions
- ✘ Tasks
- ✘ Lender Status
- ✘ Scenario builder
- ✘ Co-brokering

Updates to the Service Contract (Quebec)

This form has been updated to reflect the new AMF regulations including a new disclosure (if applicable) on both the form and edit screen:

<p>AUTHORIZATION GIVEN TO THIRD PARTY AND AGREEMENT</p> <p>The borrower allows, for the purposes of this contract, the Firm to obtain a report on his personal solvency and to disclose it to any other person who operates a business aimed at lending money.</p> <p>The borrower and the guarantor, if any, allow any personal information agent, financial institution, tax authority, employer, creditor, public body and any other persons holding information on them, such as financial information or related to any other commitment or guarantee that they consented to the lender, to the Firm . They and the lender are also allowed to communicate with each other on personal information they have about the borrower or guarantor.</p> <p>The Firm is committed, under the rules of his art, to use the data appearing in this agreement only according to the terms and conditions prescribed in the contract or pursuant to the Act.</p> <p>The Firm makes the following statements with respect to the:</p> <p>a) Number of lenders which have extended mortgage loans for which the Firm has engaged in a brokerage transaction in the previous 12 months _____</p> <p>b) Number of lenders which have extended mortgage loans for which the Broker has engaged in a brokerage transaction in the previous 12 months _____</p> <p>c) Name of lender who has granted more than 50% of the mortgage loans for which the Broker, or the Firm on whose behalf the Broker acts, has engaged in a mortgage brokerage transaction during the last 12 months (if applicable) _____</p> <p>The borrower undertakes, for the duration of this contract, not to, directly or indirectly:</p> <ol style="list-style-type: none">1. Obtain a loan by oneself or through a person other than the Firm .2. Become a party to an agreement to obtain a loan without the intermediary of the Firm . <p>This contract expires at 23: 59 on _____. In the absence of a stipulation as to its date of expiry, this agreement expires 30 days after its signature.</p>

Maintenance Items

Genworth rebranding to 'Sagen'

A number of updates have been made within Expert Broker to update the Genworth to its new branding "Sagen".

Filogix rebranding

Updates have been made, in addition to previous rebranding changes, to support the Filogix brand.

About Filogix

Filogix has served as the hub of the Canadian mortgage industry for almost two decades, offering secure, reliable connectivity to brokers and lenders. We provide trusted mortgage lending products, that enable the effective management of the sales process from origination through underwriting. As the mortgage landscape continues to change, Filogix is prioritizing advances to support the industry into the future. We're investing in a more open infrastructure and building connectivity to create a complete mortgage marketplace, helping mortgage professionals do business with more choice, speed and reliability than ever before. Learn more at [filogix.com](https://www.filogix.com)

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