FILOGIX
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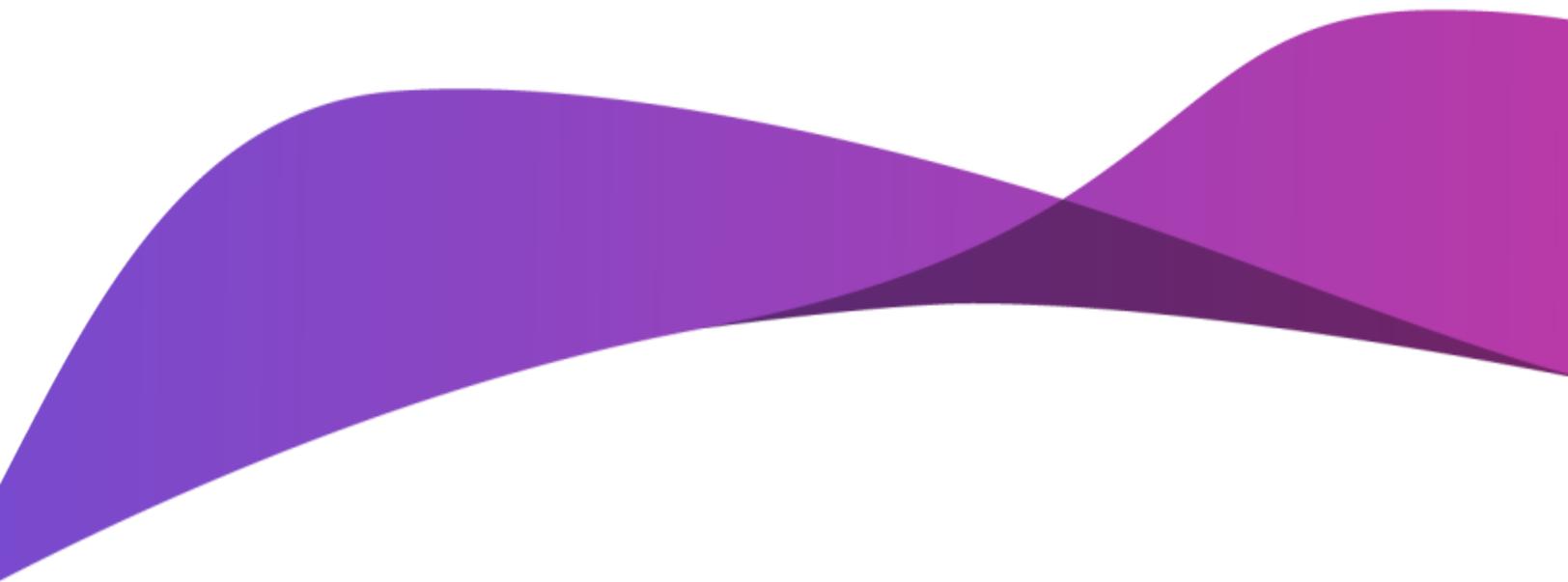
Canadian Mortgage Technology

Filogix Expert Release Notes

Release "EB 20.4"

Release Date: September 26, 2020

Contents

Overview

The September 2020 Expert Broker release includes various enhancements and maintenance fixes including:

- Lender Filtering Capability
- Ability to Look-up Employers using Google
- Scotiabank Insurance Changes
- Help File 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

Lender Filtering Capability

In order to make the growing list of lenders within Filogix Expert more managable, Filogix has introduced the ability to filter lenders within the lender drop downs in the Lender Submit and Mortgage Request Details pages. After selecting the lender drop down, simply start typing the name of the lender you wish to use in the search bar to reduce the lender list to only those lenders that contain the text string you've entered. You can then select the lender from the reduced list and proceed with your application.

Employer Look-up

You are now able to look-up your applicants' employer address and phone number by entering the employer name in the look-up box within the Employment section in Filogix Expert. Simply start typing the employer name and you'll be presented with a number of suggested employers to choose from. You can narrow your search by also entering the city of the employer after the employer name. Once you select the employer from the list, the address and phone number, if available, will populate the application.

If you wish to enter an employer in the United States, update the Country drop down and then perform the employer look-up directions outlined above.

Maintenance Items

Scotiabank Insurance

Filogix Expert has been updated (on screen and forms) to reflect Scotiabank's new maximum life insurance amount (from $750K to $1M).

Filogix Expert Help File Updates

Updates have been made to the online Expert help files in order to cover recent updates to the application.

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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**