



FILOGIX

A FINASTRA COMPANY

EXPERT PRO

Agent Orientation Guide

Getting Started on **Expert PRO**

Welcome to Filogix EXPERT PRO

Filogix Expert Pro allows mortgage professionals to centralize their business through workflow optimization resulting in improved consumer experience, more time to manage new opportunities and funding deals faster.

Filogix Expert Pro provides features such as:



Intuitive user experience

making our solution easy to use - even for new users.



Web-responsive platform

enabling you to access what you need, anywhere, anytime.



E-signature capabilities

streamlining the document execution process for you and your clients.



Secure document storage

centralizing all client documents in one secure spot.



Free Bank statement retrievals

allowing for quick down payment verification directly from the client's bank account.



Tasks automation

freeing up time to focus on client engagement.



E-mail marketing capabilities

enabling you to segment your clients and launch ad-hoc or drip campaigns.



Insights and analytics

helping you understand the who, what, when, where and how.



Custom workflow

enabling you to create and manage a workflow that suits your needs.



Data compliance

helping your deal flow quicker from submission to approval.



Efficient data collection

requesting documents faster and converting to PDF.



Client facing portal

allowing your clients to interact with you via a secure and intuitive on-line tool.

WHY FILOGIX?

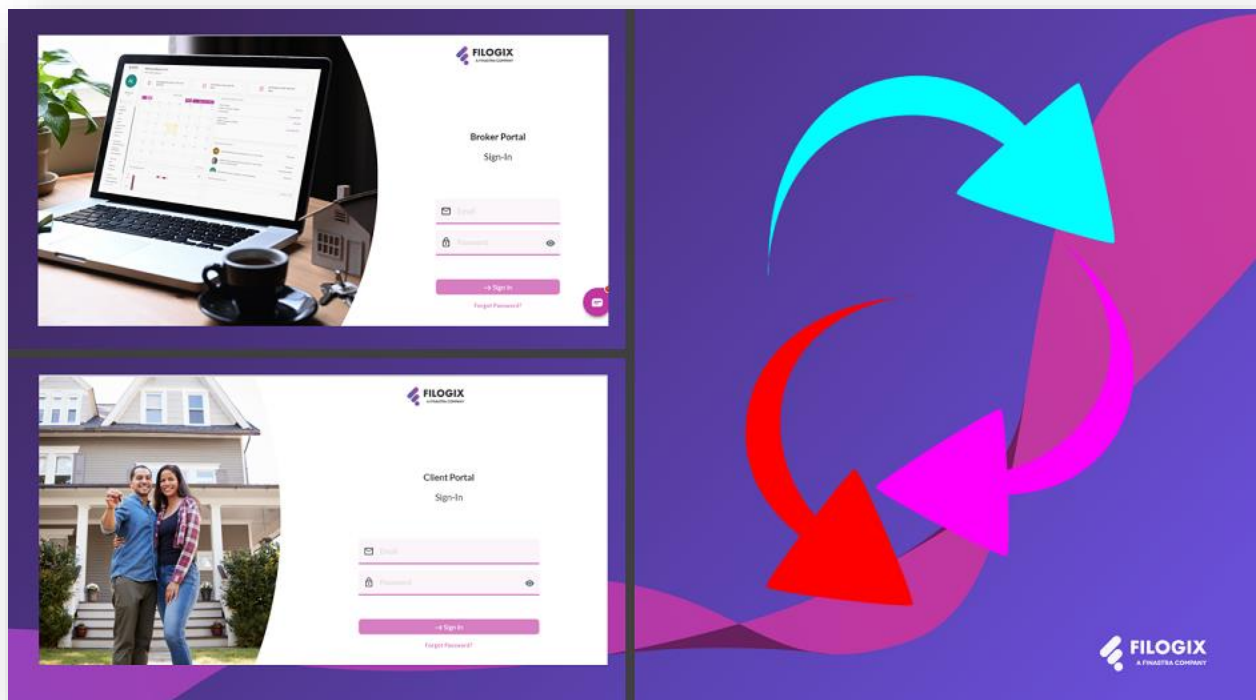
- **We are the trusted and independent technology provider of the Canadian mortgage industry.**
- **We have more experience than all other providers with almost two decades under our belt.**
- **Through the Filogix Mortgage Marketplace, we connect the largest network of lenders and brokers in the country**

WHY EXPERT PRO?

- **EXPERT PRO** offers the ability to create a better client experience that borrowers look for.
- Safe and secure way for you and your clients to communicate and send and receive documentation
- Robust platform allows you to full access to CRM functionality with no cost.

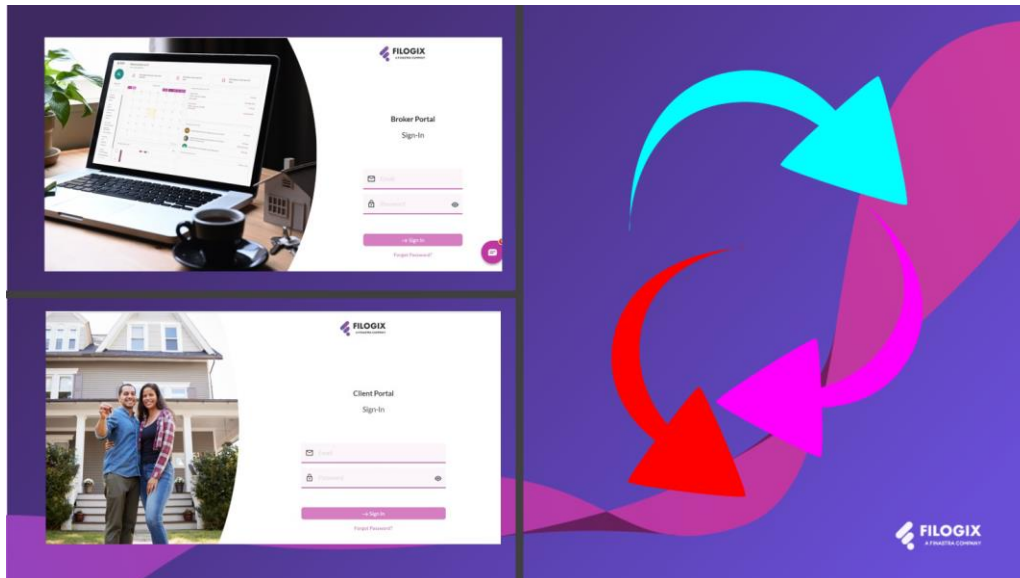
Like it or not, consumers are now comparing any customer service experience to Amazon.

[Here's Why Your Competition For Customer Experience Is Amazon And Everyone Else \(forbes.com\)](https://www.forbes.com)



GETTING STARTED

Whether you are a mortgage professional or a client, the starting page to success is the Filogix Expert login screen.



Once your **EXPERT PRO** account is created, you will receive a welcome email with instructions on how to login for the first time.

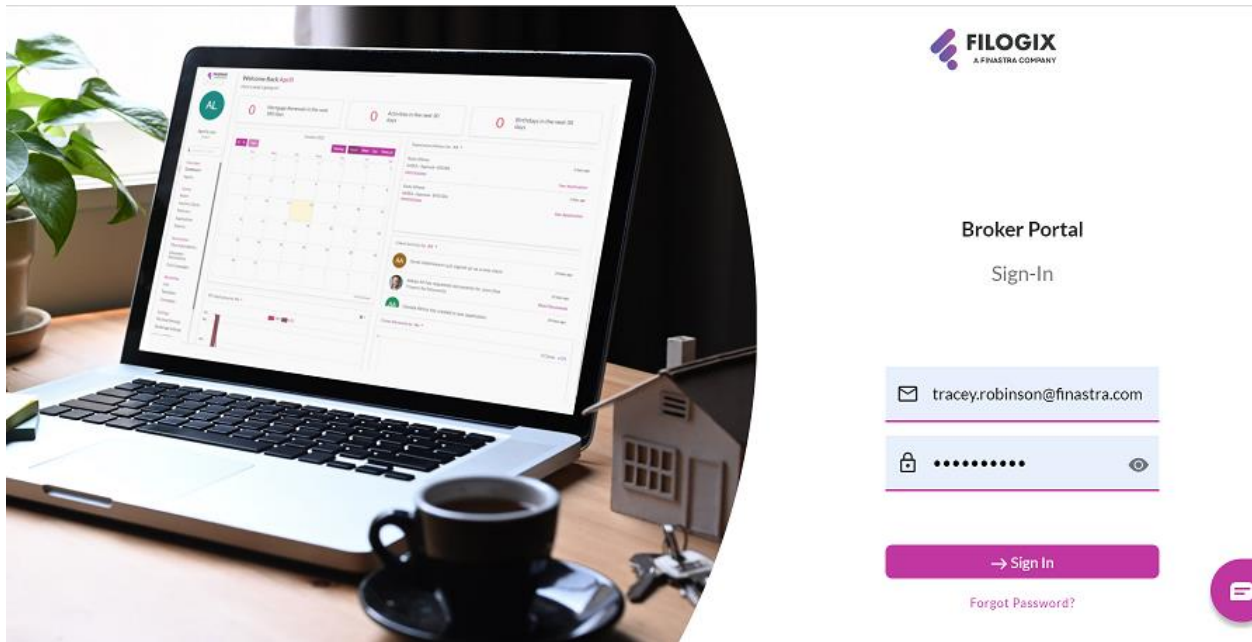
This orientation guide will help you navigate those first steps and help you to:

- Login to your new account and setup your initial password
- Adjust your personal settings
- Configure your client facing web application
- Manage disclosure documents
- Import applications from your existing Expert Broker account
- Start a new application
- Interact with the client through the client portal
- Create document templates
- Request documents from clients and providing document acceptance
- Getting the application ready for submission
- File management
- Create your first Board
- Create your first Automation
- Create a marketing campaign
- Use the chat window to get help
- Additional Resources and your Expert Pro contacts

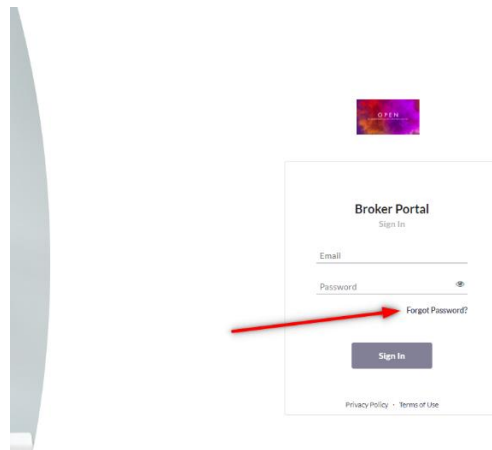
LOGIN INTO EXPERT PRO

The **EXPERT PRO** login screen is where the action begins, you will encounter your first challenge: **setting up your initial password!!**

Start by going to the Expert Pro login screen at <https://expertpro.filogix.com>



Select the 'Forgot Password' link to confirm your email address and set your first password.



Once logged in you will be directed to your home page which is your **DASHBOARD**. The dashboard provides an elevated level of important upcoming events. Once you synchronize your email and calendar your calendar will appear.

From your dashboard you can also see a variety of screens on the left-hand navigation tree. These screens allow you to access the various functions of Filogix Expert Pro.

FILOGIX
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Tracey Robinson
Broker

Search for a client

Drip Campaigns

Marketing

Lists

Templates

Campaigns

Settings

Personal Settings

Brokerage Settings

Account Plan

Legal

Terms of Use

Privacy Policy

Logout

Welcome Back Tracey!

Here's what's going on!

- 0 Mortgage Renewals in the next 180 days
- 0 Activities in the next 30 days
- 0 Birthdays in the next 30 days

Apr 2 - 8, 2023

Today Meetings Month Week Day Week List

	Sun 4/2	Mon 4/3	Tue 4/4	Wed 4/5	Thu 4/6	Fri 4/7	Sat 4/8
All Day							
6am							
7am							
8am							
9am							
10am							
11am							

Submission History for Me

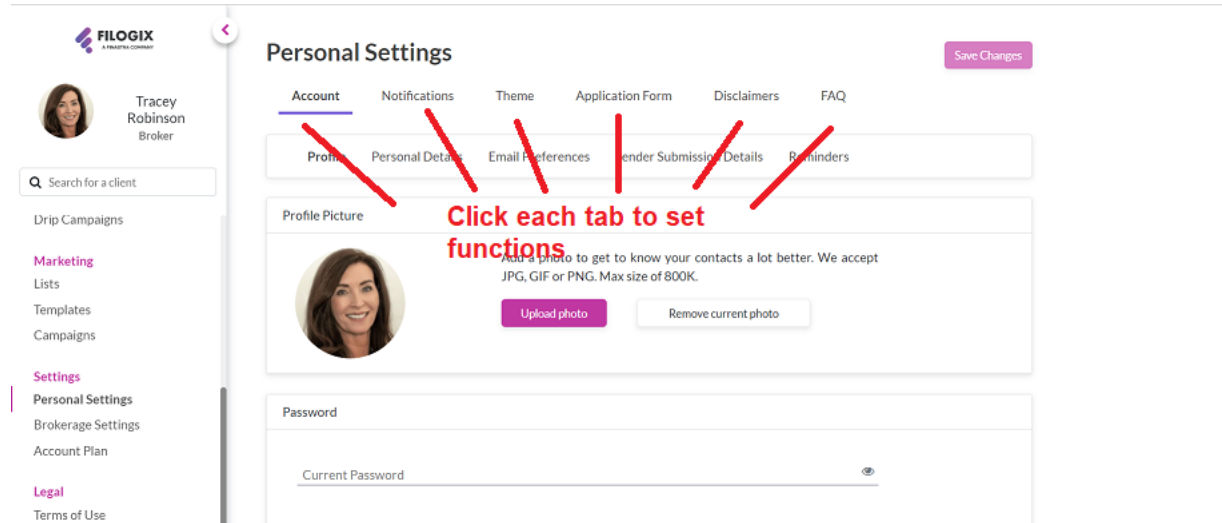
There are no direct to lender submissions in the past 30 days

Client Activity for Me

- CS Cam Sample has just signed up as a new client 15 minutes ago
- You have created a new application for 11 days ago

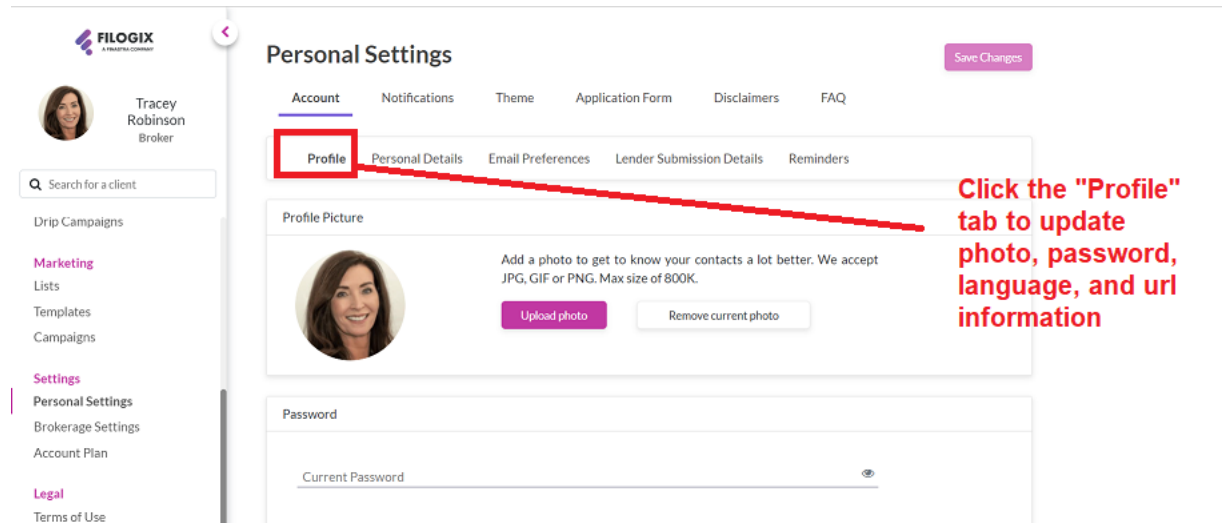
PERSONAL SETTINGS

To the left on your dashboard screen, you will see the menu to navigate through the platform. Click the “Personal Settings” option to start personalizing your information.



You will have the ability to update contact information, photo, add your website, and customize your web application directly in personal settings. You can watch a [video](#) explaining this process as well.

Let us go through each of these tabs.



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Terms of Use

Personal Settings

Save Changes

Account Notifications Theme Application Form Disclaimers FAQ

Profile **Personal Details** Email Preferences Lender Submission Details Reminders

Profile Picture

Add a photo to get to know your contacts a lot better. We accept JPG, GIF or PNG. Max size of 800K.

Upload photo Remove current photo

Password

Current Password

Click the "Personal Details" tab to input how you want your contact information to display for Client communication

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Upload photo Remove current photo

Password

Current Password

Click "Email Preferences" to add email addresses and email signature.

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Profile Personal Details Email Preferences **Lender Submission Details** Reminders

Profile Picture

Add a photo to get to know your contacts a lot better. We accept JPG, GIF or PNG. Max size of 800K.

Upload photo Remove current photo

Password

Current Password

Clicking on the "Lender Submission Details" tab allows you to auto sync your PRO account to Classic Expert.

CUSTOMIZING YOUR APPLICATION

In the “Personal Settings” tab, you can access the **Application form**, where you can choose which fields in the application are mandatory or optional for the borrower to complete or hidden from borrower view. To update the field, you would simply click on the **red box** to change from **Mandatory** to Optional. Once the **red box** is no longer visible, the field is optional to complete. By clicking on the eye icon, you can decide whether the field is visible to the borrower. When there is a line through the eye icon, this field is no longer visible to your borrower. Watch this [video](#) to see it in action.

Personal Settings Reset Visibility Settings

Account Notifications Theme **Application Form** Disclaimers FAQ

Purchase Primary Applicant(s) Subject Property Mortgage Details

Fields can be customized to appear as mandatory, optional, or hidden from client view

Personal Details MAIN APPLICANT				CO-APPLICANT			
Salutation	First Name	Middle Name	Last Name	Salutation	First Name	Middle Name	Last Name
Salutatio	First N	Middle N	Last N	Salutatio	First N	Middle N	Last N
Email				Email			
Cell Phone Number				Cell Phone Number			
Number				Number			
Work Phone Number				Work Phone Number			
Cell Phone Nur				Cell Phone Nur			
Home Phone N				Home Phone N			
Work Phone N				Work Phone N			
Date Of Birth	Social Insurance Number		Language Preference	Date Of Birth	Social Insurance Number		Language Preference
	XXX XXX XXX		Language		XXX XXX XXX		Language

DISCLAIMERS AND CONSENT

Under this tab, you will see that there is the standard disclaimer form available. You can choose to add your own additional disclaimers and request a consent form in this section. Watch this [video](#) to see it in action.

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Account Notifications Theme Application Form **Disclaimers** FAQ

Default Consent Request

Please feel free to use this general consent form for your clients if you don't have one already assigned within your brokerage. Otherwise, you can create your custom consent(s) in the section below.

ENABLED?	CONSENT MESSAGE / TITLE	LINKED DOCUMENT
<input checked="" type="checkbox"/>	Client Consent	client-consent.pdf

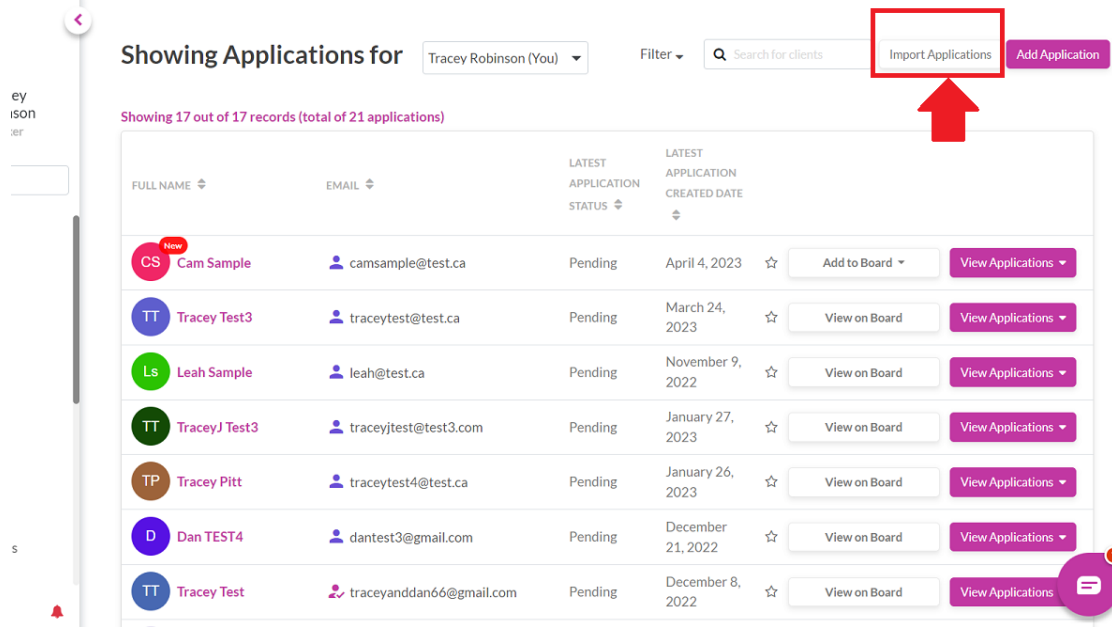
Consent Request(s) [Create Consent Request](#)

There are currently no consent forms to be displayed.




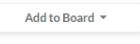
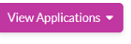



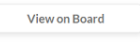
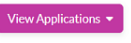



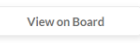
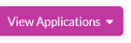



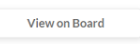
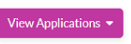



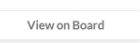
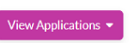



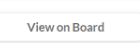
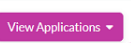



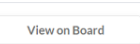
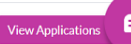
Disclaimer(s) [Create Disclaimer Message](#)

IMPORTING FILES FROM FILOGIX EXPERT INTO EXPERT PRO

Once you are comfortable with navigating in the **EXPERT PRO** platform, you will want to start the migration of existing completed files within Expert. It is **recommended** that you start this migration slowly. **EXPERT PRO** gives you the option of choosing a single file, by date range, or all your existing files. NOTE: It is important to ensure you have completed any files you wish to import. Spending time to make sure your file is accurate and up to date before doing any import is key. Watch this in action in this [video](#).



The screenshot displays the 'Showing Applications for' section of the Expert Pro platform. The client is identified as 'Tracey Robinson (You)'. A search bar for clients is present, along with an 'Import Applications' button highlighted by a red box and a red arrow pointing to it. Below the search bar, it indicates 'Showing 17 out of 17 records (total of 21 applications)'. The main content is a table listing applications with columns for Full Name, Email, Latest Application Status, and Latest Application Created Date. Each row includes a 'View Applications' button.

FULL NAME	EMAIL	LATEST APPLICATION STATUS	LATEST APPLICATION CREATED DATE	
 CS Cam Sample	 camsample@test.ca	Pending	April 4, 2023	  
 TT Tracey Test3	 traceytest@test.ca	Pending	March 24, 2023	  
 Ls Leah Sample	 leah@test.ca	Pending	November 9, 2022	  
 TT TraceyJ Test3	 traceytest@test3.com	Pending	January 27, 2023	  
 TP Tracey Pitt	 traceytest4@test.ca	Pending	January 26, 2023	  
 D Dan TEST4	 dantest3@gmail.com	Pending	December 21, 2022	  
 TT Tracey Test	 traceyanddan66@gmail.com	Pending	December 8, 2022	  

STARTING AN APPLICATION

Now that you have set up your personal information and configured your web application, you can begin working with borrowers in **EXPERT PRO**. On the left side of your dashboard, navigate to **Applications** in the menu.

The screenshot shows the Filogix dashboard for Tracey Robinson, Broker. The left sidebar menu has 'Applications' highlighted with a red box and a red arrow pointing to it. The main dashboard area displays a 'Welcome Back Tracey!' message, three summary cards for 'Mortgage Renewals in the next 180 days', 'Activities in the next 30 days', and 'Birthdays in the next 30 days', a calendar for July 9-15, 2023, and a 'Submission History for Me' section.

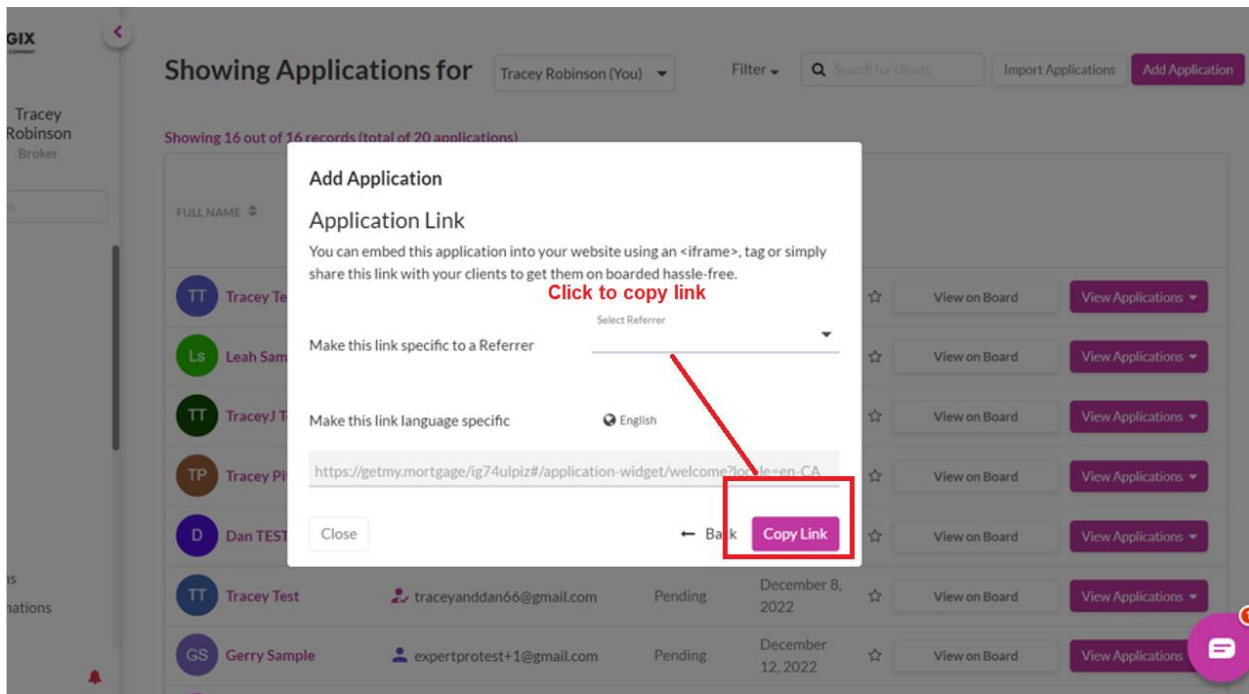
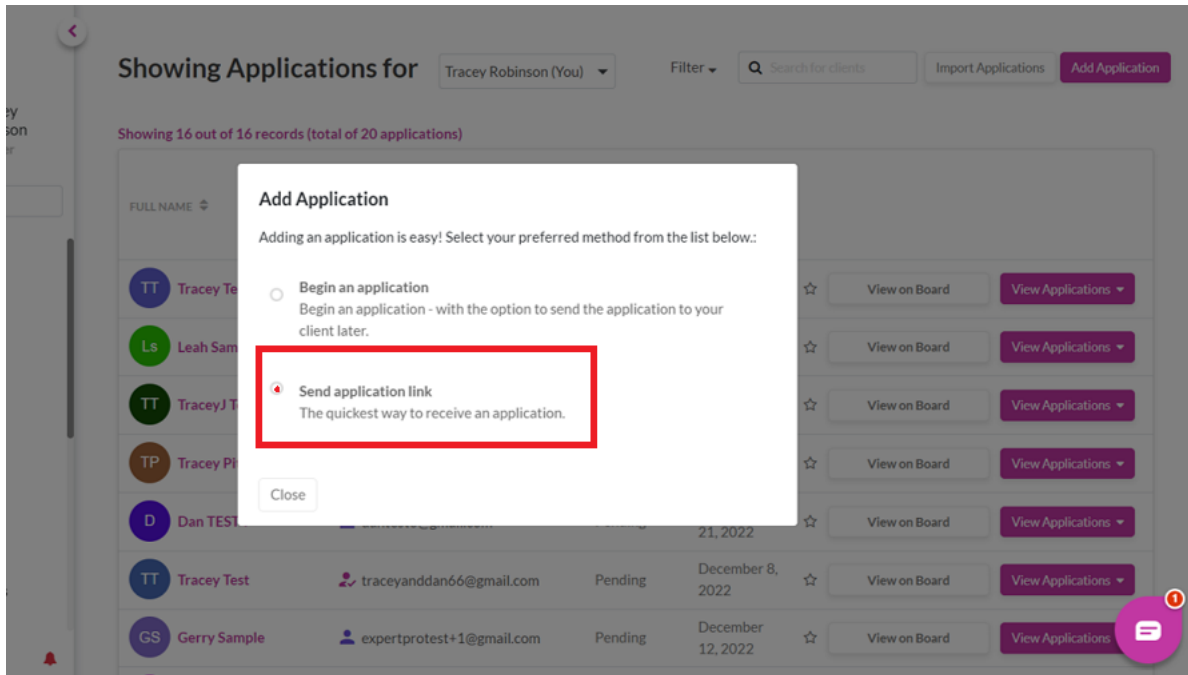
On the top right-hand corner, you will see a button to add an application.

The screenshot shows the 'Showing Applications for Tracey Robinson (You)' page. The 'Add Application' button in the top right corner is highlighted with a red box and a red arrow. Below the button is a table of applications.

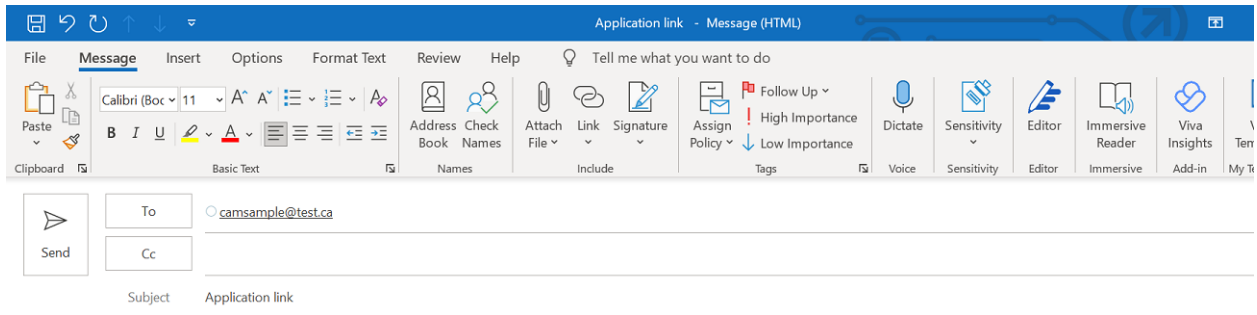
FULL NAME	EMAIL	LATEST APPLICATION STATUS	LATEST APPLICATION CREATED DATE	
Tracey Test3	traceytest@test.ca	Pending	March 24, 2023	View on Board View Applications
Leah Sample	leah@test.ca	Pending	November 9, 2022	View on Board View Applications
TraceyJ Test3	traceyjtest@test3.com	Pending	January 27, 2023	View on Board View Applications
Tracey Pitt	traceytest4@test.ca	Pending	January 26, 2023	View on Board View Applications
Dan TEST4	dantest3@gmail.com	Pending	December 21, 2022	View on Board View Applications
Tracey Test	traceyanddan66@gmail.com	Pending	December 8, 2022	View on Board View Applications
Gerry Sample	expertprotest+1@gmail.com	Pending	December 12, 2022	View on Board View Applications

The system will give you the option to begin an application or send an application link.

For this example, we will choose “send application link.”



Once the link is copied, simply paste it in an email to your client. **It is important to let borrower know that the link is safe and secure to open.**



Hi Cam,

Thanks for reaching out. Please find link below to complete your Mortgage application. You will be prompted to create a password to log into your client portal. As discussed, this will allow us to securely through your portal and send and receive sensitive documents required to move forward with your mortgage financing. I look forward to working with you.

<https://getmy.mortgage/ig74ulpiz#/application-widget/welcome?locale=en-CA>



Ensure you set the expectation for the action you want your client to complete

Click link to open application

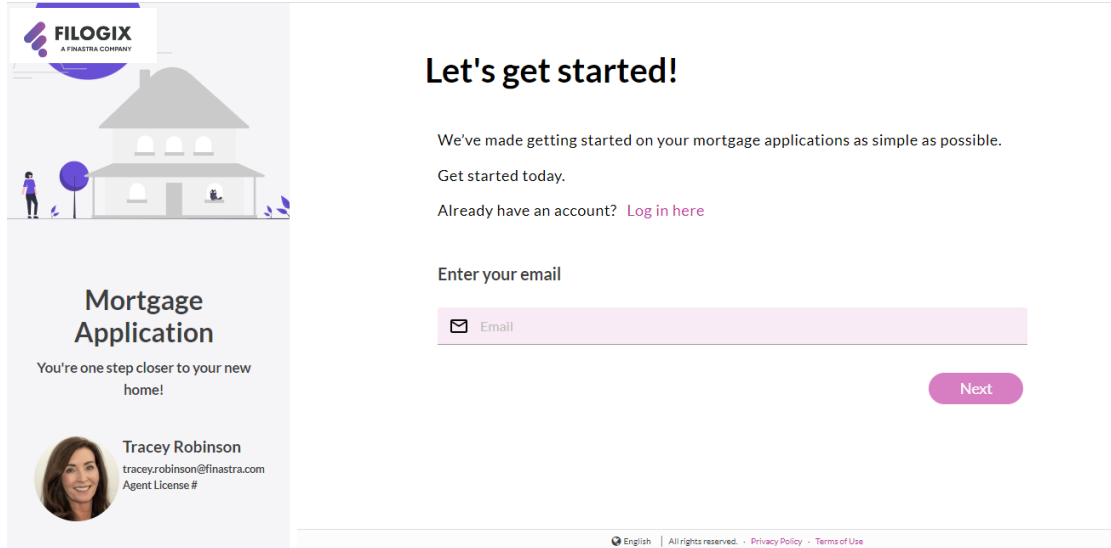
Warm Regards,



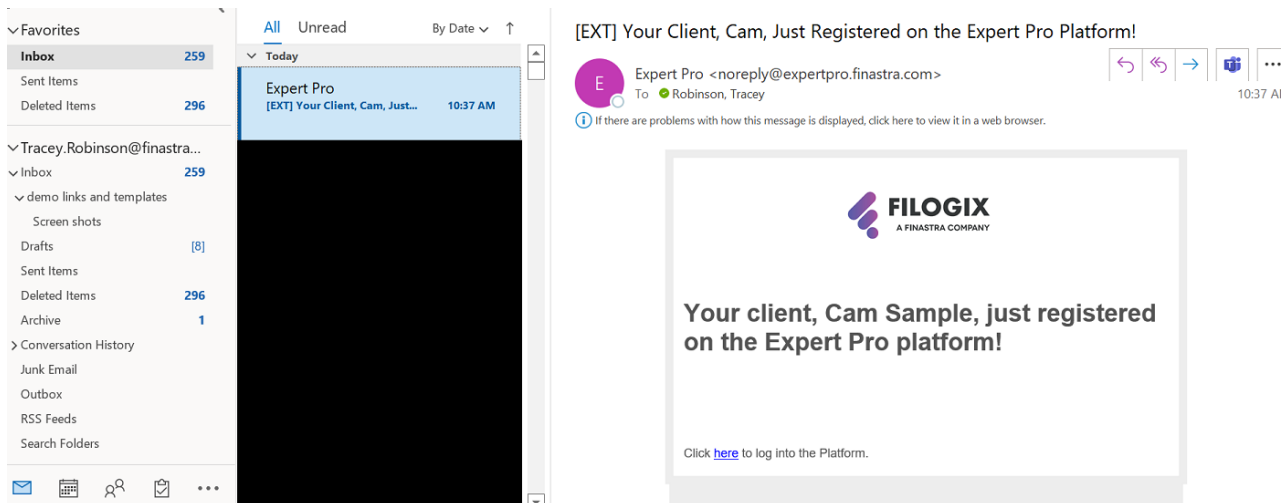
Tracey Robinson
Principal, Relationship Management and Strategic Development
E: tracey.robinson@finastra.com
T: 437 427 5927
A: **FILOGIX**, 5995 Avebury Road

INTERACT WITH THE CLIENT THROUGH THE CLIENT PORTAL

Once the client has clicked on the link, they can create their email address and create a password. This is all that is required to create their own secure client portal.



When they complete this step, you get notification that they have registered.



From there, they will complete the online application and submit it to you.

Please validate your email address so that you can come back later and benefit from all the features of the application.


STEP 1 **Your Goals** STEP 2 Subject Property STEP 3 Applicants STEP 4 Your Income History STEP 5 Your Assets STEP 6 Properties You Own Rev

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TT Tracey Test1
Client
App ID: 1161604

[Back to dashboard](#)

Mortgage Application


Tracey Robinson
tracey.robinson@finastra.com

[Logout](#)

What's your mortgage goal?

What are you applying for?

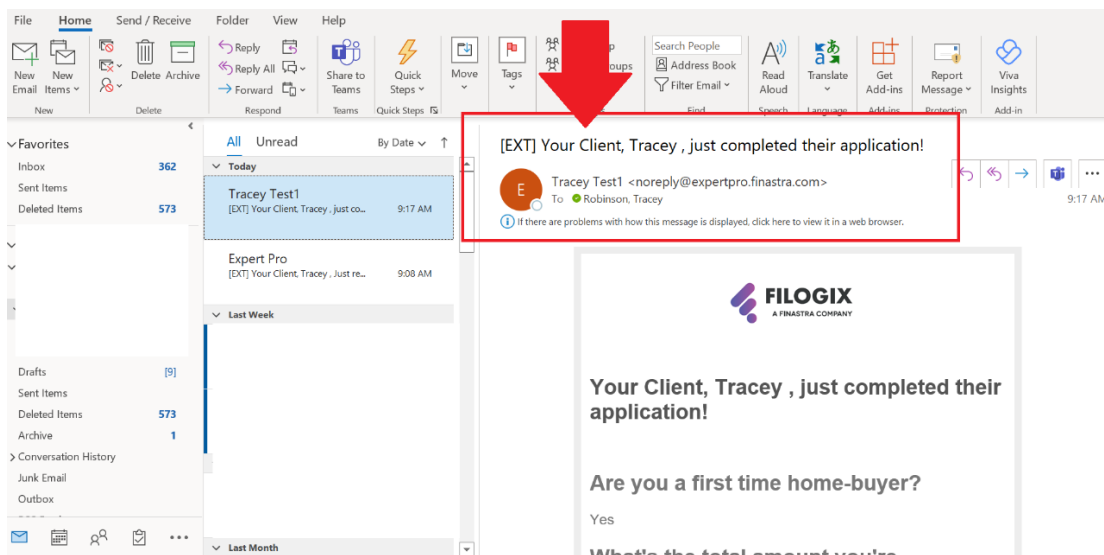
- Purchase
- Refinance
- Switch/Transfer

Where are you in the process of purchasing?

- Found a Home
- Searching

What's the address of the property you wish to purchase? *

You will receive an email notification that the borrower has sent their application to you.



The screenshot shows an Outlook email interface. A red arrow points to a notification box that says "[EXT] Your Client, Tracey , just completed their application!". The notification is from Tracey Test1 <noreply@expertpro.finastra.com> to Robinson, Tracey. Below the notification, the email content is visible, starting with the FILOGIX logo and the text "Your Client, Tracey , just completed their application!".

CREATING YOUR DOCUMENT TEMPLATES

Showing Applications for Tracey Robinson (You) Filter Search for clients Import Applications Add Application

Showing 18 out of 18 records (total of 22 applications)

FULL NAME	EMAIL	LATEST APPLICATION STATUS	LATEST APPLICATION CREATED DATE	Actions
Tracey Test1	expertprotesttj@gmail.com	Submitted	January 23, 2023	View on Board View Applications
Tracey Test3	traceytest@test.ca	Pending	March 24, 2023	View on Board View Applications
Evangeline Thasitis	evangelinethasitis@mortgagegroup.com	Pending	May 10, 2023	Add to Board View Applications
Cam Sample	camsample@test.ca	Pending	April 4, 2023	View on Board View Applications
Leah Sample	leah@test.ca	Pending	November 9, 2022	View on Board View Applications
TraceyJ Test3	traceyjtest@test3.com	Pending	January 27, 2023	View on Board View Applications
Tracey Pitt	traceytest4@test.ca	Pending	January 26, 2023	View on Board View Applications

Once application is open and you are ready to request documents, click the documents tab in the borrower application.

The owner of the application has not verified their Expert Profile Number, please ask them to head to Personal Settings > Lender Submission Details and Sync with Filogix

Cam Sample #1201061 Application last saved: 3 days ago

PENDING UNABLE TO SYNC Validate Actions

Application Documents Direct to Lender Forms Internal Notes

Purchase Primary Applicant(s) Subject Property Mortgage Details

Personal Details CAM SAMPLE MAIN APPLICANT Swap Applicant Disabled CO-APPLICANT

Salutation	First Name	Middle Name	Last Name
Salutation	Cam (3/20)	Middle Name	Sample (6/40)
Salutation	First Name (3/20)	Middle Name	Last Name (3/40)

Cell Phone Number Home Phone Number Work Phone Number

Date Of Birth Social Insurance Number Language Preference

Marital Status Dependents

First Home

You can upload documents and create your own document templates.

The owner of the application has not verified their Expert Profile Number, please ask them to head to Personal Settings > Lender Submission Details and Sync with Filogix Expert to proceed. [Dismiss](#)

Tracey Test1 #1161604 Application last saved: 4 hours ago

SUBMITTED UNABLE TO SYNC

Validate Actions

Application Documents Filogix Direct to Lender Forms Internal Notes

Documents List

Request Documents via Email Download selected as... Manage labels Select a Template Save as Template

<input type="checkbox"/>	Borrower ID (1/1) ✓	Description: Click here to edit	Upload	
<input type="checkbox"/>	Employment Letter (0/0)	Description: Click here to edit	Upload	
<input type="checkbox"/>	MLS Listing (0/0)	Description: Click here to edit	Upload	
<input type="checkbox"/>	Pay Stub (0/0)	Description: Click here to edit	Upload	
<input type="checkbox"/>	Proof Of Debts Paid (0/0)	Description: Click here to edit	Upload	
<input type="checkbox"/>	Auto Generated Consent Form (1/1) ✓	Description: Auto generated	Upload	

Select document type Manage Document Types

Application Ratios [RE-CALCULATE](#)

SUMMARY

LTV: 0.000%

CREDIT SCORE

Tracey Test1: N/A

APPLICANT TOTALS

Employment Income (Annual): \$70,000.00

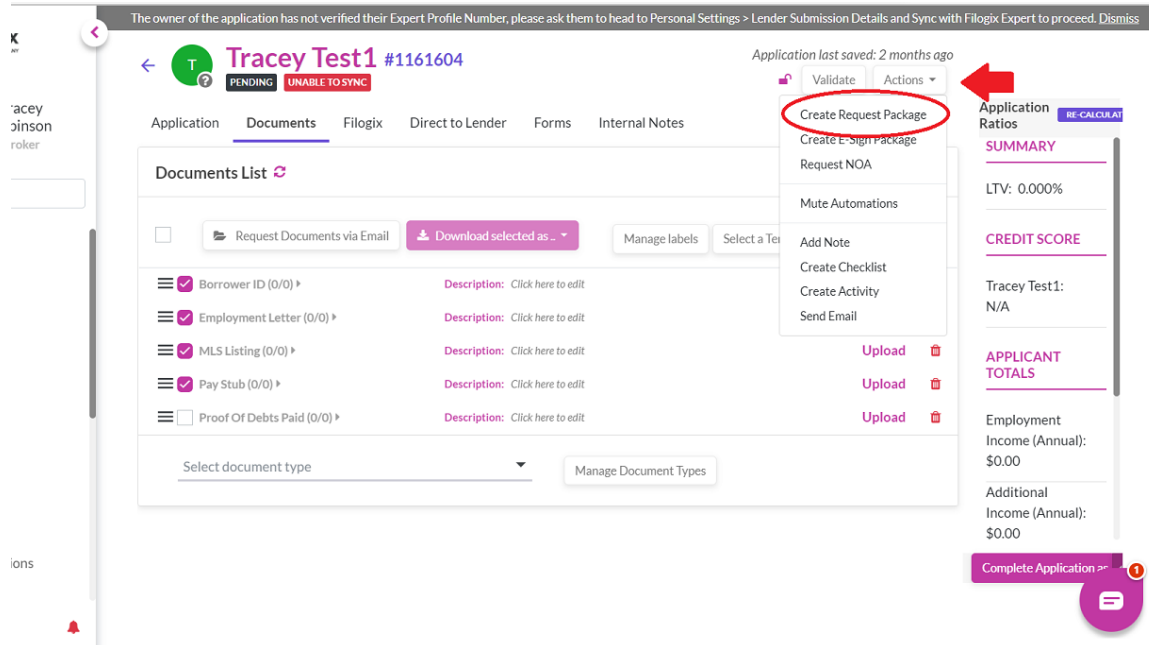
Additional Income (Annual): \$0.00

Complete Application [2](#)

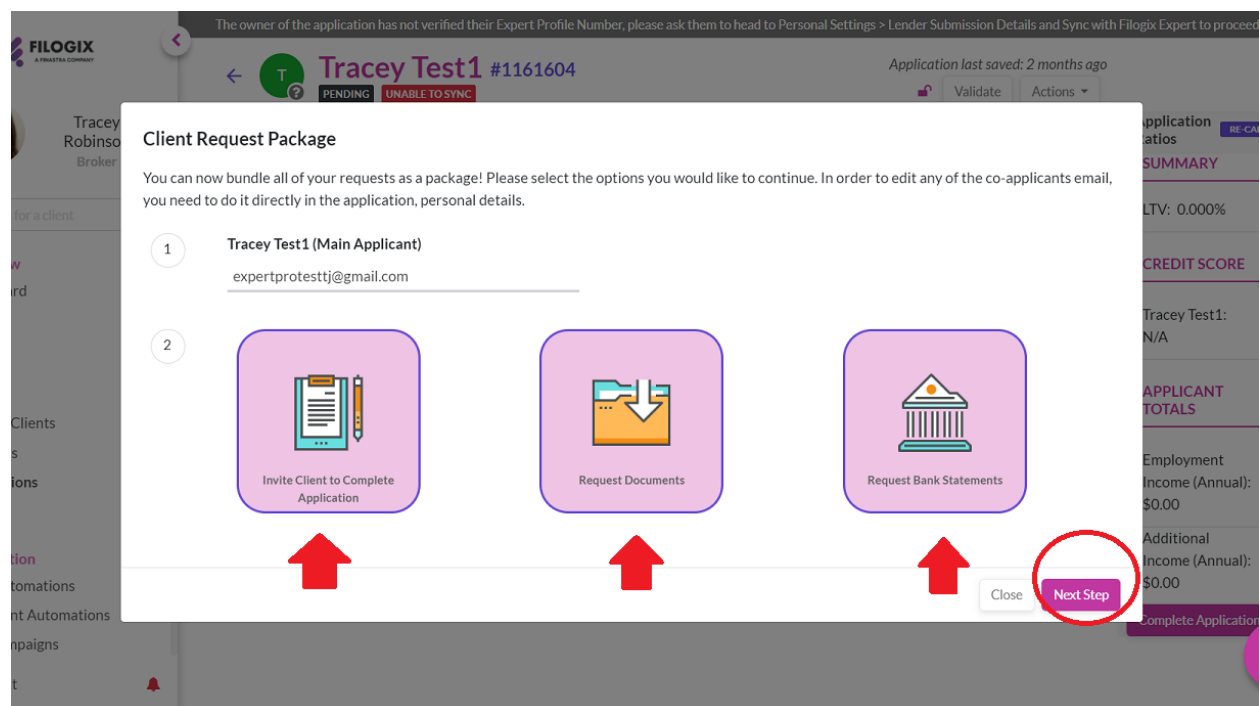
FILOGIX
A FINASTRA COMPANY

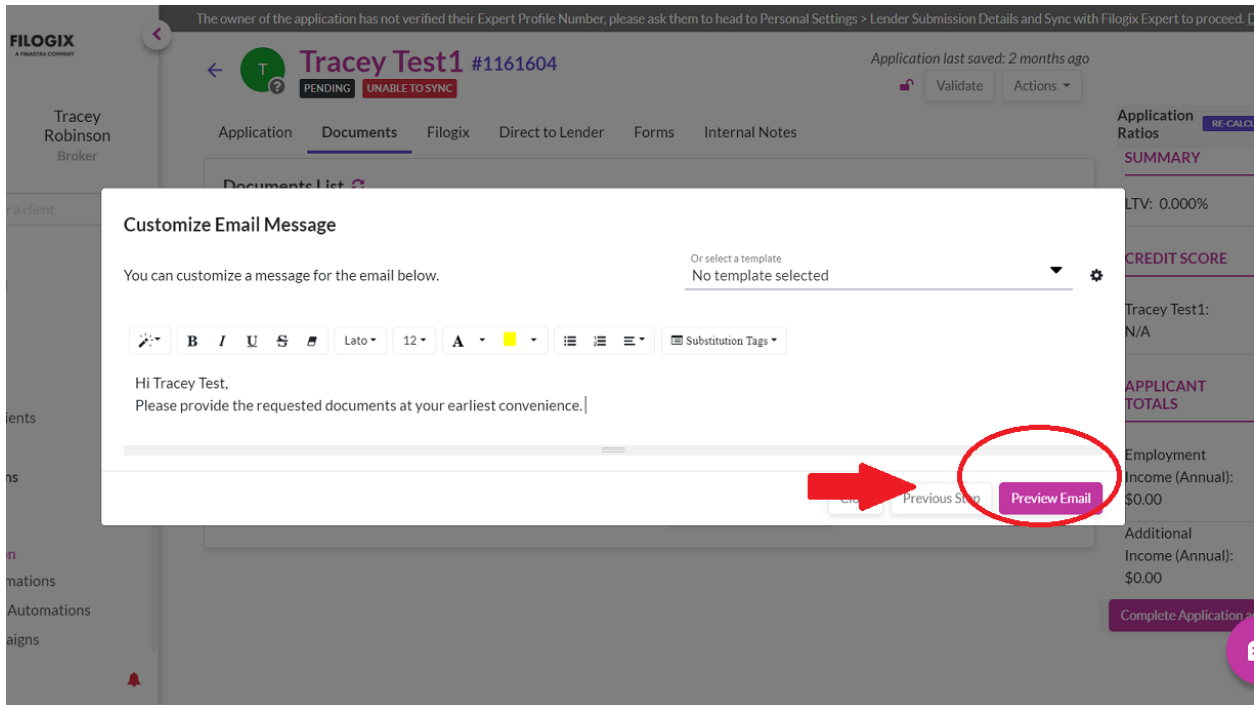
CREATE DOCUMENT REQUEST PACKAGE

Once you are ready to request documents, simply click on the action button on the top right-hand side of the application. You can watch this in action in this [video](#).

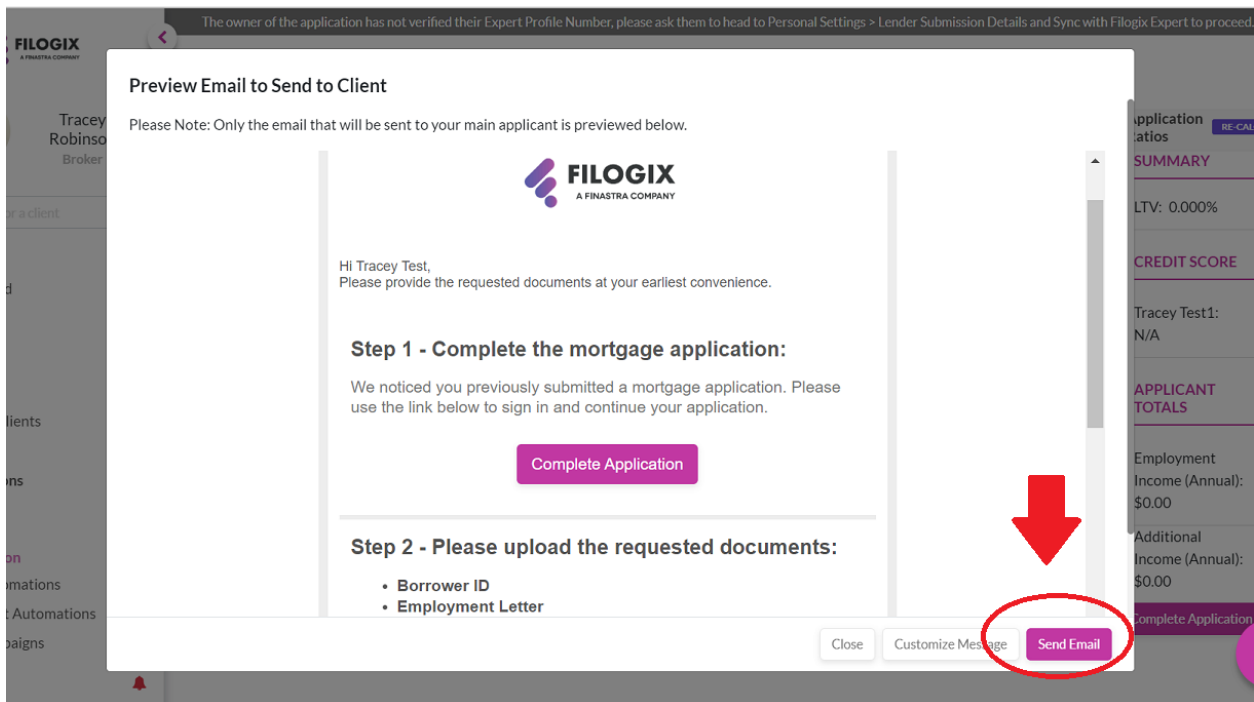


You have the option of requesting of the following actions either as a group or individually. Once you have decided which information you need completed, hit the next step button to start your customized email request.



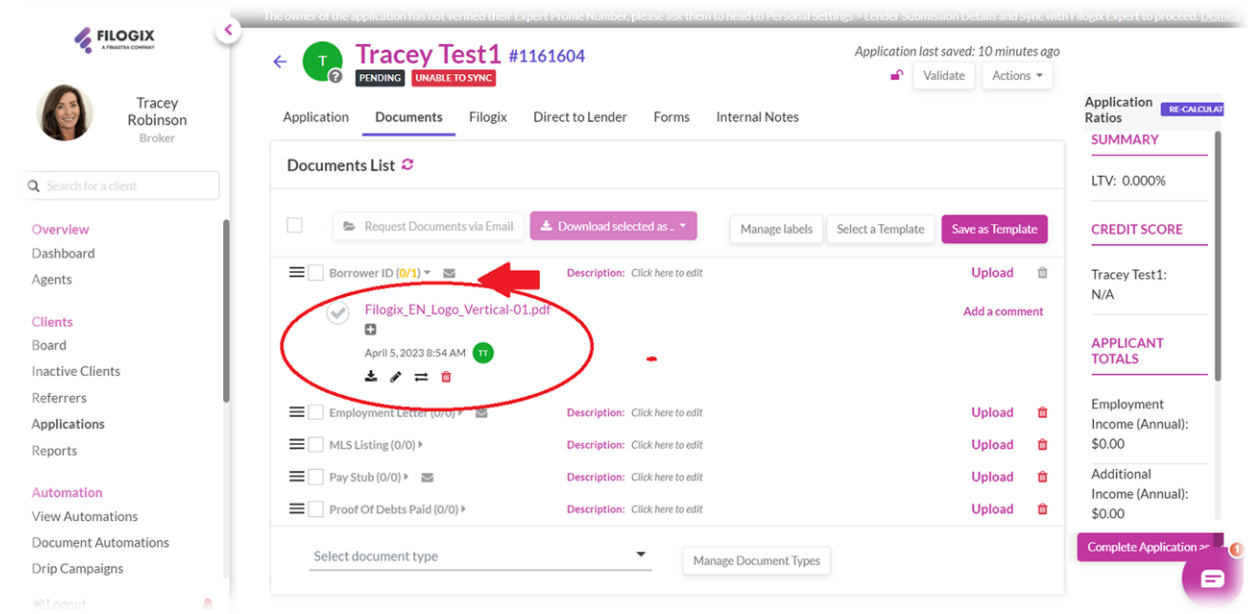


The system allows you the opportunity to preview the package request prior to hitting the send button.

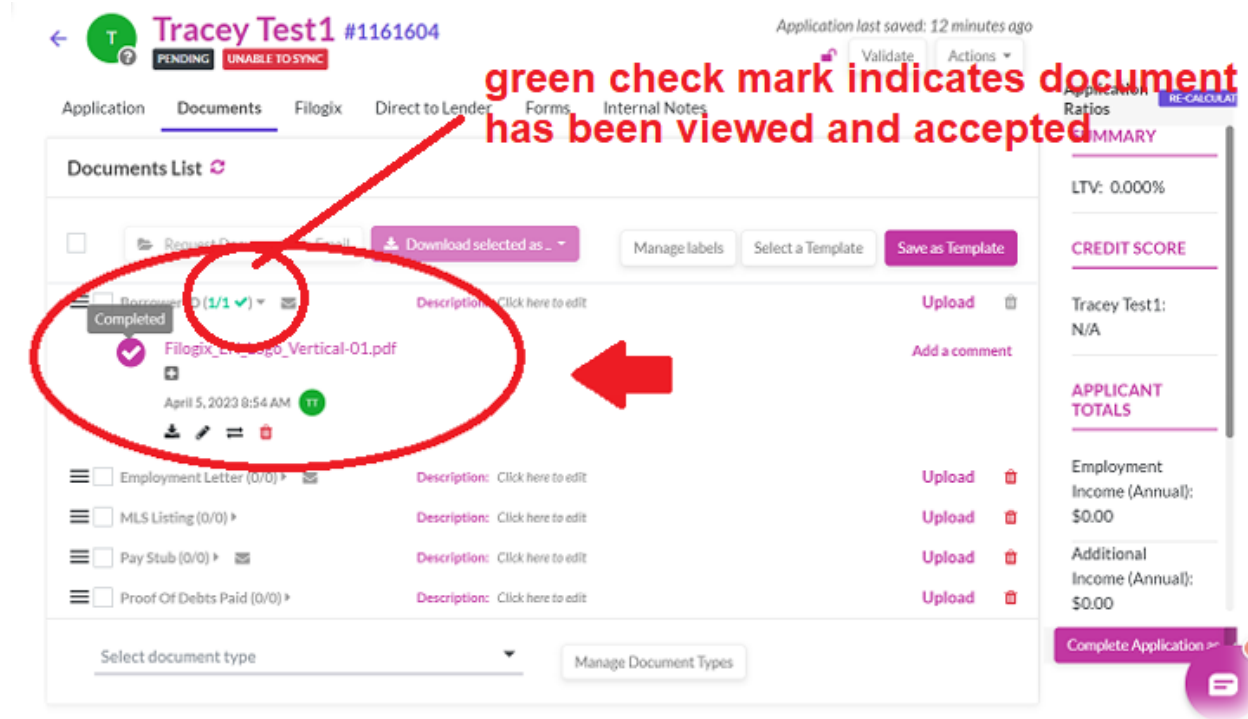


ACCEPTING DOCUMENTS

You can preview the borrower uploaded documents in your portal.



You can accept, delete, or request further information. Once you have accepted the documentation, there will be a green check mark indicator beside the document title.



GETTING THE APPLICATION READY TO SUBMIT

As you work through your client application, you will continue editing file information until you are ready to submit to your lender of choice.

FILOGIX
A FINASTRA COMPANY

Tracey Robinson
Broker

Tracey Test1 #1161604
Application last saved: 5 hours ago

Application Documents Filogix **Direct to Lender** Forms Internal Notes

Credit Bureau Participants Lender Submit Lender Response Fees Commissions

access bureaus, change agents on file and submission agent as well as submit your application to the lender on the tabs above. Lender response tab shows submission information

NAME*	DATE OF BIRTH*	AUTHORIZATION OBTA*	AUTHORIZATION METH*	SINGLE*	COPY LIABILITIES*
Tracey Test1	1988-04-01	YYYY-MM-DD	Method		

To pull Credit Reports, please go to the Personal Settings - Lender Submission Details page and enter in your credentials.

Print Consent Form Request Bureau

Historical Credit Reports

There are currently no requested credit reports.

Application Ratios **RECALCULATE**

SUMMARY

LTV: 0.000%

CREDIT SCORE

Tracey Test1:
N/A

APPLICANT TOTALS

Employment
Income (Annual):
\$70,000.00

Additional
Income (Annual):
\$0.00

Complete Application

MANAGING YOUR FILES

EXPERT PRO allows you the option of utilizing the built in CRM to help manage your business. From customizable client boards to track where each client is in the mortgage process, to creating automations to assist with efficiencies and elevate the client experience, you are in control of how it is set up.

"Implementing a CRM system will do absolutely nothing for your business. However, the continued and effective use of it will." - smallbizcrm.com

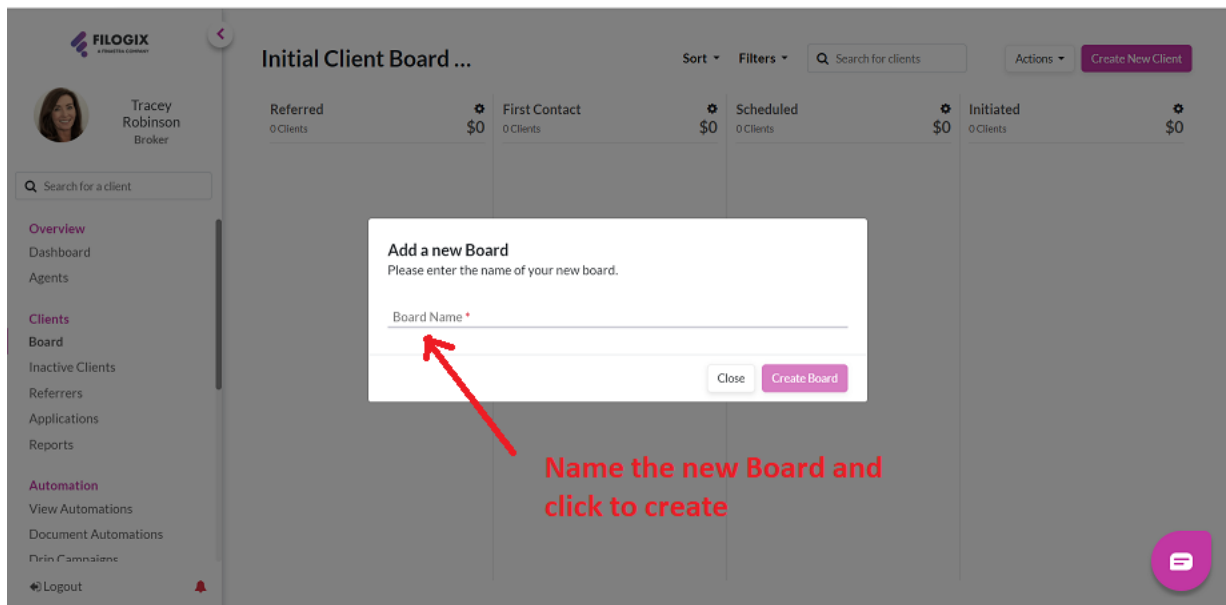
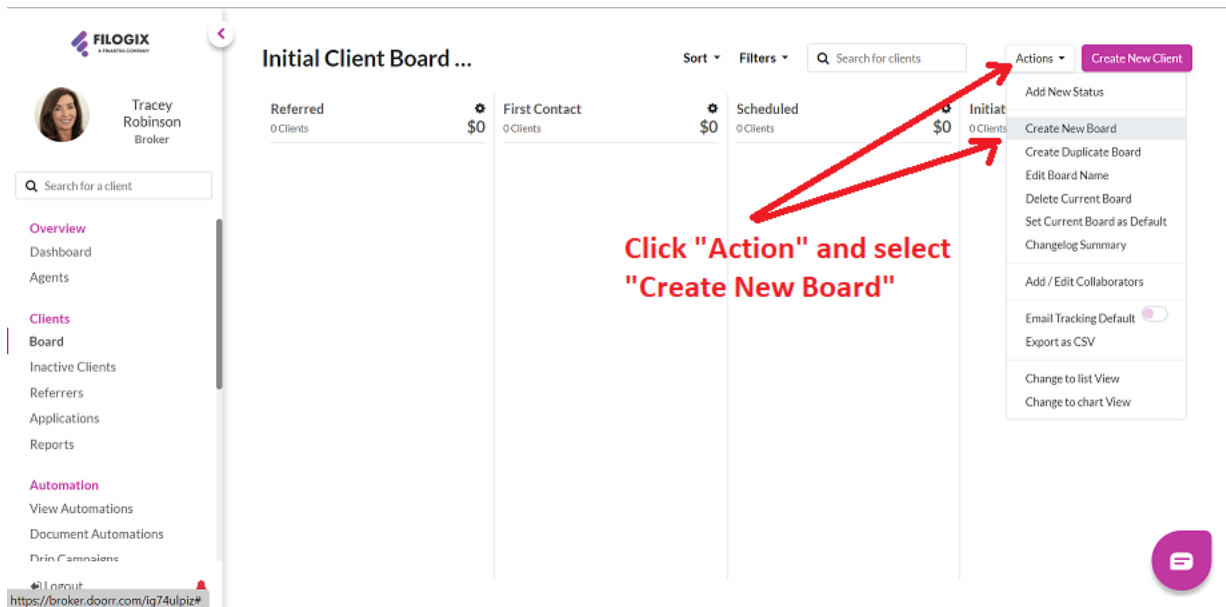
USING BOARDS IN EXPERT PRO

The **BOARD** feature in **EXPERT PRO** allows you to manage client files with ease and know where your clients are in the mortgage transaction process. You can watch this in action in this [video](#).

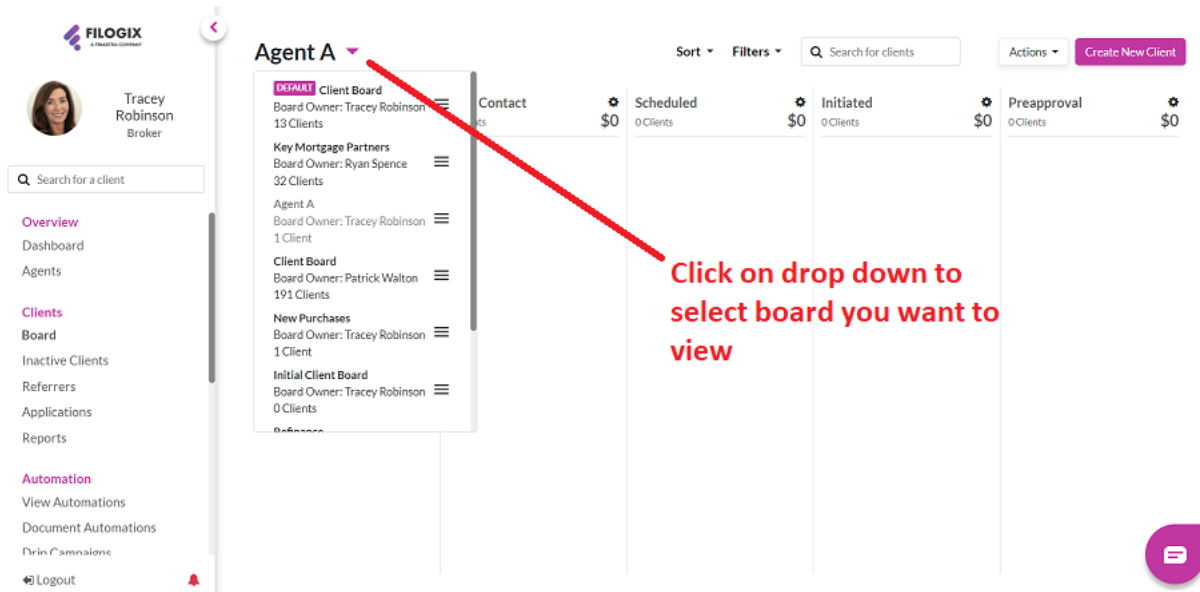


A screenshot of the Filogix user interface. The top left shows the user's profile: Tracey Robinson, Broker. Below it is a search bar for clients. A sidebar menu on the left includes 'Overview', 'Dashboard', 'Agents', 'Clients', and 'Automation'. The 'Board' option under 'Clients' is highlighted with a red box and a red arrow pointing to it. The main content area displays a dashboard with three summary cards: 'Mortgage Renewals in the next 180 days', 'Activities in the next 30 days', and 'Birthdays in the next 30 days'. Below these is a calendar view for 'Jul 30 - Aug 5, 2023' with a 'Click on Board' label and a red arrow pointing to the calendar. To the right of the calendar are sections for 'Submission History for Me' (showing no direct to lender submissions) and 'Client Activity for Me' (showing recent client actions like 'tracey brown has just signed up as a new client').

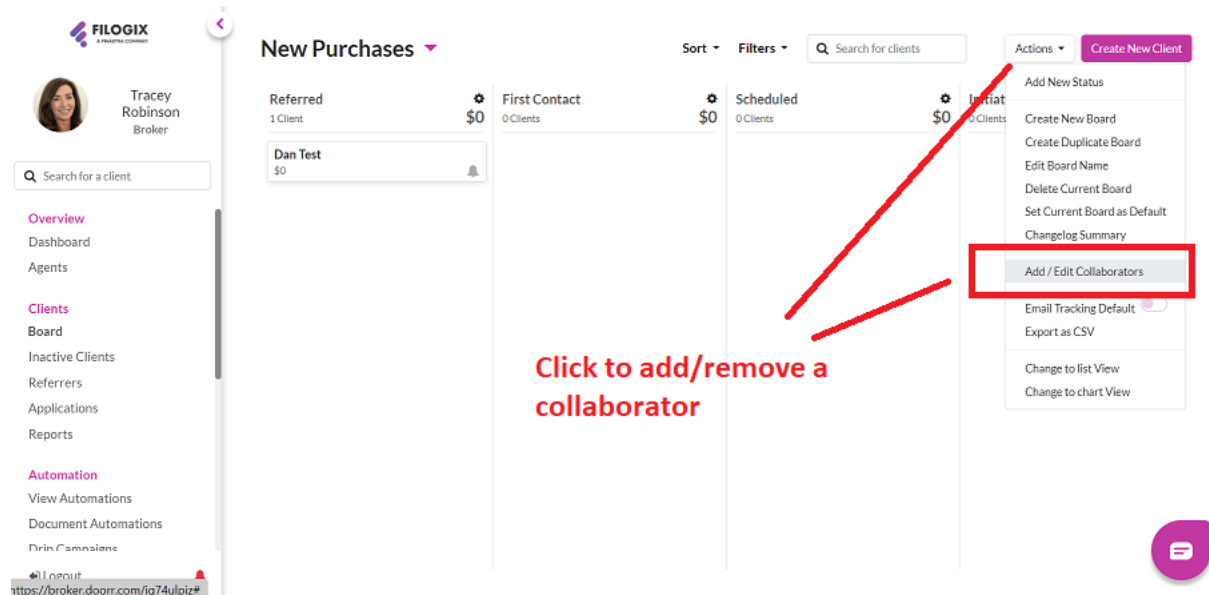
The initial Board displayed on your portal will have columns outlining a simple transactional life cycle. You can add, edit, and remove columns according to how you want your board to look. You can also create as many boards as you need to manage your portfolio of clients. For example, you can create a “purchase” board, a “refinance board,” a “renewal board,” etc.



Continue same process to add additional boards.



The board gives you the option of adding and/or removing collaborators that may need to assist with a client file.



NOTE: To add or remove a collaborator access to all or specific boards, this action **must be completed for each board.**

Client Board

Sort ▾ Filters ▾ Search for clients Actions ▾ Create New Client

Referred	First Contact	Scheduled	Pre approved	Initiated	Pending	Pending clo...
3 Clients \$0	1 Client \$0	2 Clients \$0	1 Client \$0	3 Clients \$0	2 Clients \$300.00k	0 Clients \$0
Tracey Pitt \$0	Brittney Spears \$0	Leah Sample \$0	Dan Test 1 \$0	Leah sample \$0	Leah Sample \$300.00k Testing Person	
Tracey Test3 \$0		Gerry Sample \$0		Gilda Radner \$0		Tracey Test 1 \$0
Tracey Test \$0				Dan TEST4 \$0		

Navigation: Overview, Dashboard, Agents, **Board** (with red star), Inactive Clients, Referrers, Applications, Reports, Automation, View Automations, Document Automations, Drip Campaigns, Logout

As you move your client closer to completing their mortgage journey, you can move the client tile to the next column to prepare for the next stage and identify or action the next step in the process.

USING AUTOMATIONS IN EXPERT PRO

The **AUTOMATION** feature in **EXPERT PRO** allows you to customize a communication or a task to be completed automatically as you move your client through their mortgage journey. You can see this in action in this [video](#).



The screenshot shows the FILOGIX software interface. On the left, a sidebar contains navigation links: Overview, Dashboard, Agents, Clients, Board, Inactive Clients, Referrers, Applications, Reports, Automation, View Automations (highlighted with a red box), Document Automations, Print Formations, and Logout. The main area is titled 'New Purchases' and features a search bar and a 'Create New Client' button. Below this, there are four columns representing different stages: Referred (1 Client, \$0), First Contact (0 Clients, \$0), Scheduled (0 Clients, \$0), and Initiated (0 Clients, \$0). A client named 'Dan Test' is listed under the 'Referred' column. A red arrow points from the 'View Automations' link in the sidebar to the text 'Click to open'.

Automations can be set at Board level, Application level, or Document level.

FILOGIX
A FINASTRA COMPANY

Tracey Robinson
Broker

Board Level Application Level Documents

Search for a client

- Overview
 - Dashboard
 - Agents
- Clients
 - Board
 - Inactive Clients
 - Referrers
 - Applications
 - Reports
- Automation
 - View Automations
 - Document Automations
 - Drip Campaigns


Logout

View Automations


View and manage all your automations below.

Create New Automation

SELECT THE APPROPRIATE TYPE



Triggerable only by me



Triggerable by any board collaborator

When Client Profile Status Changed ▶

TRIGGERS WHENEVER: CLIENT PROFILE STATUS CHANGED

When Client Profile Created ▶

TRIGGERS WHENEVER: CLIENT PROFILE CREATED

+

FILOGIX
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Tracey Robinson
Broker

Board Level Application Level Documents

Search for a client

- Overview
 - Dashboard
 - Agents
- Clients
 - Board
 - Inactive Clients
 - Referrers
 - Applications
 - Reports
- Automation
 - View Automations
 - Document Automations
 - Drip Campaigns

Logout

View Automations

View and manage all your automations below.

Board Level Application Level Documents

Application Automation Settings

This section lets you automate all Renewal, Anniversary and Birthday emails sent to your clients. In order to get started, you are required to perform the initial setup below. Once complete, you can begin setting up the automations!

Campaign Details

Your Name

Email Address Select Email
 + CREATE

List Details

Contact info for this list
Why do we ask for this?

+



Q Search for a client

Overview

Dashboard
Agents

Clients

Board
Inactive Clients

Referrers

Applications

Reports

Automation

View Automations

Document Automations

Drip Campaigns

Logout

View Automations

View and manage all your automations below

Board Level Application Level **Documents ?**

Manage Document Types

General

AUTOMATICALLY REQUEST DOCUMENTS BASED ON GENERAL RULES

All Mortgage Types Except Pre-Approval

Requested for all applicant(s) for every application that is not a pre-approval.

Below documents will be requested:

Property Tax Statement(s)
No Description

Borrower ID
No Description

Employment Letter
No Description

Edit Active

Always Request on Any Purchase

Always request these document types when the applicant has submitted a Purchase Mortgage Application.

Below documents will be requested:

Employment Letter
Letter from your employer d...

Borrower ID
Driver's license and seconda...

MLS Listing
No Description

Edit Active

Request upon Submission

Always request these document types from each applicant(s)

Below documents will be requested:

2 Main Forms of Identificati...
No Description

Edit Active



USING MARKETING TOOLS IN EXPERT PRO

The screenshot shows the FILOGIX Expert Pro dashboard for Tracey Robinson, Broker. The dashboard includes a sidebar with navigation options: Inactive Clients, Referrers, Applications, Reports, Automation (View Automations, Document Automations, Drip Campaigns), Marketing (Lists, Templates, Campaigns), and Settings (Personal Settings, Brokerage Settings, Account Plan). The main content area features three summary cards: '0 Mortgage Renewals in the next 180 days', '0 Activities in the next 30 days', and '1 Birthdays in the next 30 days'. Below these is a calendar for 'Apr 9 - 15, 2023' with tabs for Today, Meetings, Month, Week, Day, and Week List. The calendar shows a yellow highlight for Friday, April 14th. To the right, there are sections for 'Submission History for Me' (no direct to lender submissions in the past 30 days) and 'Client Activity for Me' (Tracey Test1 has uploaded a new Mortgage Statement document).

EXPERT PRO includes a variety of marketing tools to help keep in touch with your clients. All the marketing tools are customizable as well as there are standard templates included to assist with your communications. Watch this in action in this [video](#).

The screenshot shows the 'Templates' page in the FILOGIX Expert Pro dashboard. The page title is 'Templates' with the subtitle 'View and manage all of your templates below.' There is a search bar for templates. Below the search bar is a navigation bar with tabs: All, Saved, Predefined, Generic, Birthdays, Newsletters, Prospects, Thank-You, Holidays, and Celebrate. The main content area displays a grid of template cards. The first card is 'Create New'. The second card is 'Empty'. The third card is 'Simple Text'. The fourth card is '1 Column'. The fifth card is '2 Columns'. The sixth card is 'Feature Sheet'. Below these are several other template cards with various designs and colors. A red box highlights the navigation tabs, and a red arrow points from the 'Templates' link in the sidebar to the 'All' tab in the navigation bar.

Templates feature allows you to choose from a wide array of communication pieces or create your own customized templates to send to your clients through campaigns.

USING THE CHAT BOX IN EXPERT PRO

The screenshot displays the FILOGIX EXPERT PRO dashboard for user Tracey Robinson, Broker. The interface includes a left-hand navigation menu with sections for Reports, Automation (View Automations, Document Automations, Drip Campaigns), Marketing (Lists, Templates, Campaigns), and Settings (Personal Settings, Brokerage Settings, Logout). The main content area features a welcome message, three summary cards (0 Mortgage Renewals, 0 Activities, 1 Birthdays), a calendar for April 30 to May 6, 2023, and two activity panels. The 'Client Activity for Me' panel shows a recent activity from 'Tracey Test1' with a document icon circled in red and a red arrow pointing to it. The FILOGIX logo and 'A FINASTRA COMPANY' tagline are visible in the top left and bottom right corners.

One of the most valuable tools you will find in **EXPERT PRO** is the “**Chat Box**” function located at the bottom right hand corner of every screen. This connects you directly with our support team to help answer any questions, troubleshoot, as well as it provides you access to a number of videos and FAQ’s to help you navigate through **EXPERT PRO** easily and comfortably.

ADDITIONAL RESOURCES

EXPERT PRO has a library of “HOW TO” videos to assist with getting started and answering your questions on setting up your **PRO** portal.

[Filogix Expert Pro How-to Videos | Finastra Canada](#)

PRO Tip: It is suggested that you spend approximately 45 minutes a week to add a new board, automation, work on importing old files, etc.

*“CRM doesn't have to be hard, if you plan for how all the pieces will work together **BEFORE** you start your implementation.” ~ goodreads.com*

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