



Canadian Mortgage Technology

Filogix Expert Release Notes

Release “EB 20.1”

Release Date: January 11, 2020

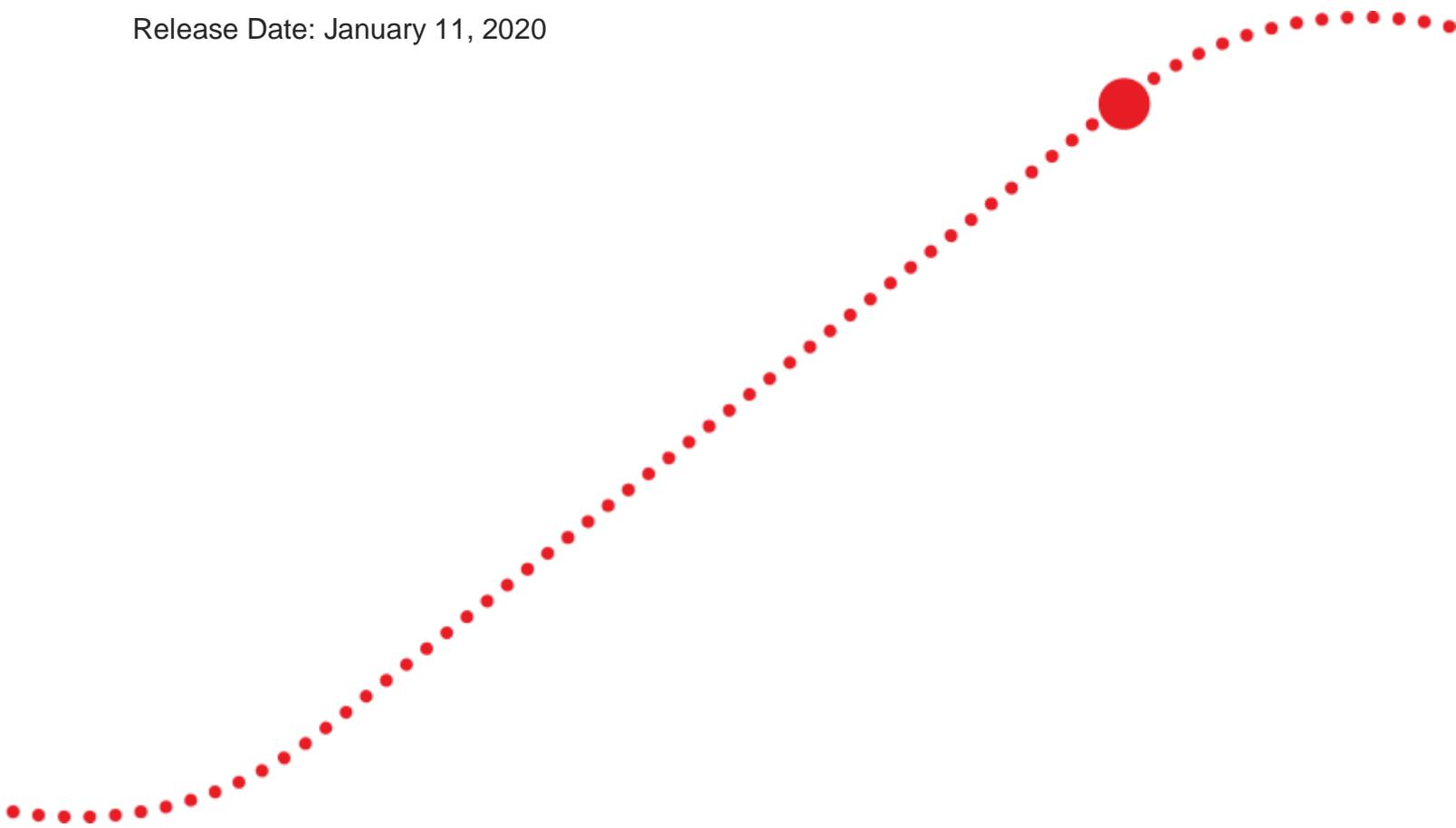


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Overview

The January 2020 Expert release includes some minor enhancements and maintenance fixes:

- Shortcut to allow users to copy the primary borrower details to the Appraisal request screen
- Ability to use a closing date range when creating the Firm Statistics Report
- Password reset enhancement
- Update to the BC Form 9 - Lender Disclosure Statement

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

Appraisals - Contact Information Shortcut

When completing the contact information section on the Appraisal screen in Expert, you are now able to use a new 'Copy Primary Applicant Contact Details' copy icon in order to auto-fill the contact's first name, last name, phone number and email address. If any information already exists prior to activating the copy function, the existing data will be overwritten with the primary applicant's details.

Additional Information

Subject Property: 10 - 57 Park Maze SE, Richmond, Newfoundland and Labrador F8I 7A0

Copy Primary Applicant Contact Details

Contact Name: First Last Phone:

Email:

Special Instruction:

Contact Type:

Validate Submit Request Close

Appraisal Order Summary

Firm Statistics Report - Closing Date Filter

You are now able to use a Closing Date range to filter the results in the existing Firm Statistics Report (accessed via the Reports screen)

Firm Statistics Report

Level: Application Status: Format:

Date type: Date From: Date To:

Filter for Annual Information Return (AIR)

Run Report Set Default Settings Reset To Default Cancel

Password Reset Enhancement

When resetting your Expert password, you now have the option to use your cell phone number on file to validate your credentials.



filogix EXPERT

Password Reset

To reset your password, you will need to confirm that you are the owner of this account by providing information that only you as the account owner would know.

Firm Code:

Login ID:

Email Address:

Cell Phone:

Work Phone Number:

Click "Submit" to reset password.

An email will be sent to your email address of record.

Please contact your System Administrator should you require further assistance.

BC Form 9 - Lender Disclosure Statement

The hyperlink for Inter Alia Mortgages contained in the BC Form 9 – Lender Disclosure Statement has been updated to reflect the government’s updated webpage.



E – REGISTERED INTEREST

Your interest as a lender will be directly registered on the mortgage document filed at the Land Title Office; or

_____ will act as a trustee or nominee and will hold a registered interest in the mortgage in trust for you as beneficial owner; or

Your interest in the mortgage will be secured under the following arrangements:

F – PROPERTY TO BE MORTGAGED

Is this an inter alia mortgage? Yes No

[If yes, please skip Sections F and G of this Form and complete Sections I and K of the Form 9 Addendum for Inter Alia Mortgages](#)

Legal Description of Property: _____

Property taxes

Annual Property taxes: \$ 2,000.00

Are taxes in arrears?

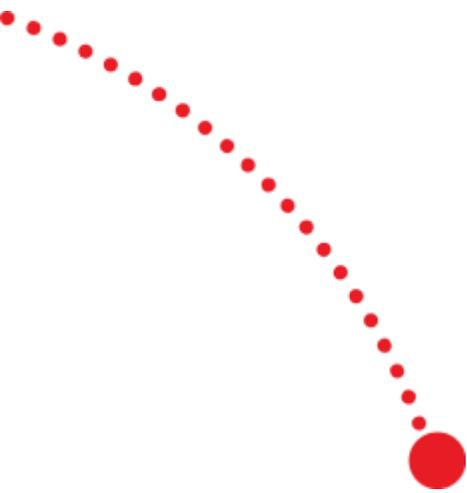
Yes

No

If yes, amount in arrears: \$ _____

Zoning

If mortgage proceeds are to be used for construction financing, is the zoning on the property to be developed appropriate for the proposed



About Filogix

Filogix has served as the hub of the Canadian mortgage industry for more than a decade. We are the industry leading connectivity provider, providing 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.

