



Canadian Mortgage Technology

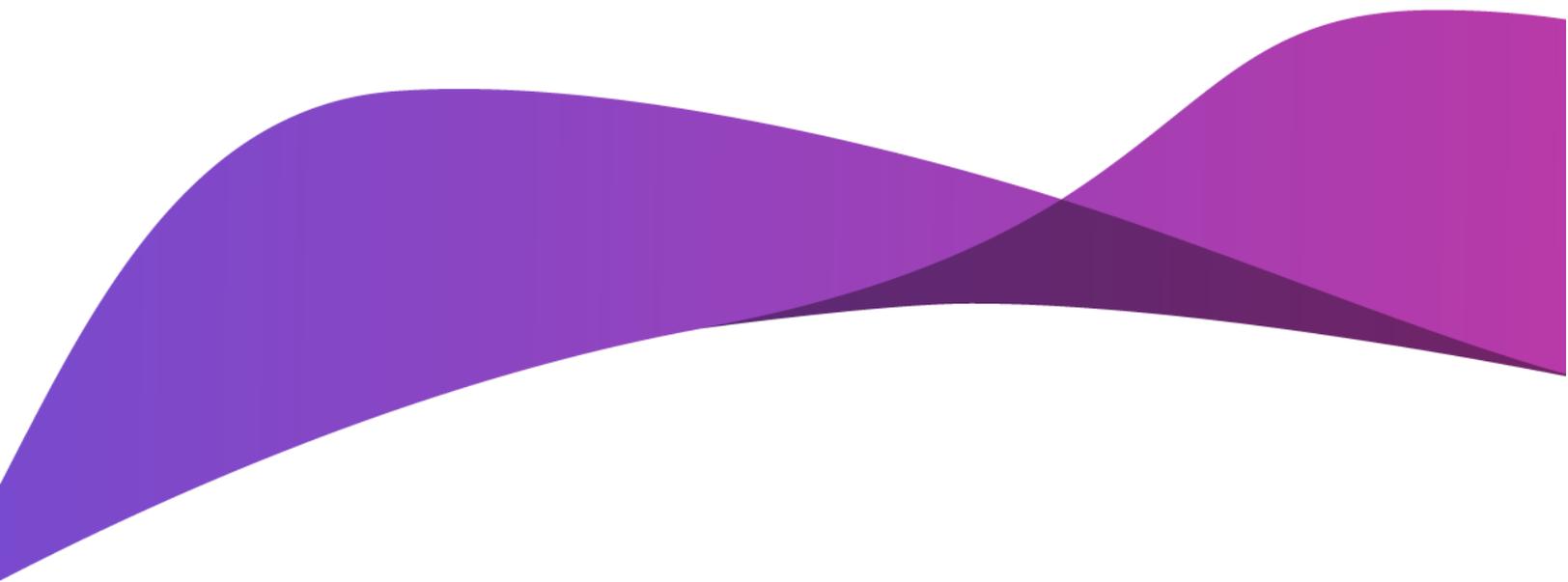
Filogix Expert Release Notes

Release "EB 20.5"

Release Date: November 28, 2020

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Overview

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

- Ability to Generate Manulife's MPP Consumer Digital Links for Your Client(s)
- Employer Lookup Changes to Allow Address Searches
- Ability to Update Notification Emails
- Additional Payment Frequency Options – Mortgage Analyzer and Isolator
- Addition of Rate Type to the Mortgage Application Form
- Rebranding

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

Ability to Generate Manulife's MPP Consumer Digital Links for Your Clients

You are now able to supply your clients with a unique link, allowing them to access their personalized Mortgage Protection Plan online application. Simply click on the "Applicant URL's" hyperlink in the Forms page of Filogix Expert to request your client's url's from Manulife. A window will be displayed with your client's name, personalized url and email address. Utilize the 'Copy Link' button for the applicant you wish to send the personalized link, this will copy the link to your computer's clipboard, then click on the applicant's email which will launch your default email provider. You can then paste the url in the body of the email.

Once you have entered the email's subject, message, signature, etc you can send the email to your applicant and allow them to complete their insurance application online. Repeat these steps for any applicants you want to allow to take advantage of this feature.

Note: Your firm needs to be signed up for the MPP service in order for it to be activated on this screen. This new feature does not change the existing MPP Request "Print" feature on the Forms screen. You are still able to access the PDF document from Manulife as you did previously.

The screenshot shows the Filogix Expert interface. At the top, it displays the user's name (John Smith, Agent), profile number (1707), and login information. Below this is a navigation menu with options like Workspace, Home, Reports, Tools, Options, and Help. The main content area shows application details for 'EXBA-127' by 'Merit, Kyle'. A table provides financial metrics: Deal (29.115%), 1st Mtg (25.119%), 2nd Mtg (0.000%), Credit Scores (Kyle Merit 0, John Adams), TDS (29.115%), LTV (158.330%), and Net Worth (\$66,667.00). Below the table is a list of application forms with 'Print' and 'Edit' buttons. A red arrow points to the 'Applicant URL's' link in the 'MPP Request' row.

The screenshot shows a Manulife pop-up window titled 'Manulife' with the following text: 'Below are the URL's generated for your clients to access their personalized Mortgage Protection Plan online application. Copy and Paste the link into an email to send to your client. Each application has their own link, so be sure to send them separately! For further information email support@brokersupportcentre.com or call 1 866 677 4677 Ext 1.' The window contains a table with the following data:

Applicant	Manulife Online Site	Email
Kyle Merit	https://everythingdigitaluat.manulife.com/home/FBBC99B2CKHX1 Copy Link	KyleMerit@yahoo.ca
John Adams	https://everythingdigitaluat.manulife.com/home/FBBC99B2CKHX2 Copy Link	John@mail.com

The window also includes an 'OK' button at the bottom.

Employer Look-up Changes to Allow Address Searches

You now have the option of entering either the employer's name or address when using the Employer Lookup feature in the Employment section of Filogix Expert. The additional option of entering an address allows you to ensure BFS/Self Employed and other scenarios that rely on the address as opposed to the employer's name can take advantage of the auto complete feature.

Employment

Applicant 1

Employer Lookup:	IBM Markham
Employer Name:	IBM Canada Limited Steeles Avenue East, Markham, ON, Canada
Status:	IBM Canada Software Lab - Toronto Warden Avenue, Markham, Unionville, ON, Canada
Country:	IBM Customer Solution Centre 14th Avenue, Markham, ON, Canada
Address Line 1:	PACE Credit Union IBM Markham Steeles Avenue East, Markham, ON, Canada
Address Line 2:	
City:	Ibm oficina Markham Street, Markham, ON, Canada
Province:	
Phone:	Ext. <input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>

powered by Google

Self Employed:	<input type="checkbox"/>
Company Type:	<input type="text"/>
Operating As:	<input type="text"/>
Gross Revenue:	<input type="text"/>
Job Title:	test
Occupation:	Other
Industry Sector:	Other
Income Type:	Salary
Income Period:	Annual
Time at Job:	y 5 m 0
Years in Ind:	y 5 m 0
Income Amount:	90,000.00

Delete Applicant 1 Employment

Employment

Applicant 1

Employer Lookup:	55 Lorraine
Employer Name:	55 Lorraine Drive North York, ON, Canada
Status:	55 Lorraine Avenue Kitchener, ON, Canada
Country:	55 Lorraine Crescent Brampton, ON, Canada
Address Line 1:	55 Lorraine Road Port Colborne, ON, Canada
Address Line 2:	
City:	55 Lorraine Crescent St. Albert, AB, Canada
Province:	
Phone:	Ext. <input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>

powered by Google

Self Employed:	<input type="checkbox"/>
Company Type:	<input type="text"/>
Operating As:	<input type="text"/>
Gross Revenue:	<input type="text"/>
Job Title:	<input type="text"/>
Occupation:	<input type="text"/>
Industry Sector:	<input type="text"/>
Income Type:	<input type="text"/>
Income Period:	<input type="text"/>
Time at Job:	y 0 m 0
Years in Ind:	y 0 m 0
Income Amount:	<input type="text"/>

Ability to Update Notification Emails

You now have the ability to update the email address(es) that receive notifications from Expert (eg Application assigned to you from another agent, new web referral, commitment received in Expert, etc). Under the Options tab, select Contact Information to view your settings. You can then enter / update your notification email(s). If you wish to have notifications sent to multiple emails, separate each email with a semi-colon (no spaces).

Note: This option is not available to all Filogix Expert users

The screenshot shows the Filogix Expert user interface. At the top right, the user's name is Derek Matthewson, Broker (Owner), with profile number 5828. The interface includes a navigation menu with tabs for Workspace, Home, Reports, Tools, Options, and Help. The 'Options' tab is selected, and a purple arrow points to it. Below the navigation menu, there are sections for 'Application Information' and 'User Options'. The 'User Options' section includes 'Change Password' and 'Save Search Filters'. A second purple arrow points to the 'Contact Information' link in the 'User Options' section.

The screenshot shows the 'Contact Information' form. At the top, it displays 'User Login: MATTHEWSOND' and a note: '** The information provided in the screen below will appear on forms that contain the agent contact information'. The form is divided into three main sections: 'User Information', 'Office Address', and 'Notifications Email'. The 'User Information' section includes fields for Salutation, First Name (Derek), Middle Initial, Last Name (Matthewson), Language Preference (English), Work Phone (416-555-7777), Cell Phone (416-555-8888), Fax, Password Reset Email (password@gmail.com), and Lender Preferred Contact Method (Email). The 'Office Address' section includes fields for Unit Number, Street Number, Street Name (123 Somewhere Street), Street Type, Street Direction, City (Brampton), Province (Ontario), and Postal Code. The 'Notifications Email' section has a text input field containing 'alert@dy.com;Matts@notify.com' and a note: 'Separate multiple addresses with a semi-colon'. At the bottom of the form are 'Cancel' and 'Save' buttons.

Payment Frequency Options

The Mortgage Analyzer and Mortgage Isolator tools now include both accelerated and non-accelerated payment options for biweekly and weekly frequencies.

Mortgage Isolator

Quickly and easily Isolate a variable in the determinants of a mortgage payment.

1. Payment Frequency:	<div style="border: 1px solid black; padding: 2px;"> Monthly ▼ Monthly Semi-Monthly Bi-Weekly Accelerated Bi-Weekly Weekly Accelerated Weekly </div>		?
2. Amortization Period (yy/mm):		<input type="button" value="Calculate"/>	?
3. Mortgage Amount (\$):		<input type="button" value="Calculate"/>	?
4. Interest Rate (%):		<input type="button" value="Calculate"/>	?
5. Mortgage Payment:		<input type="button" value="Calculate"/>	?

Revised Amortization Period: Years Months

Top of Page ↑

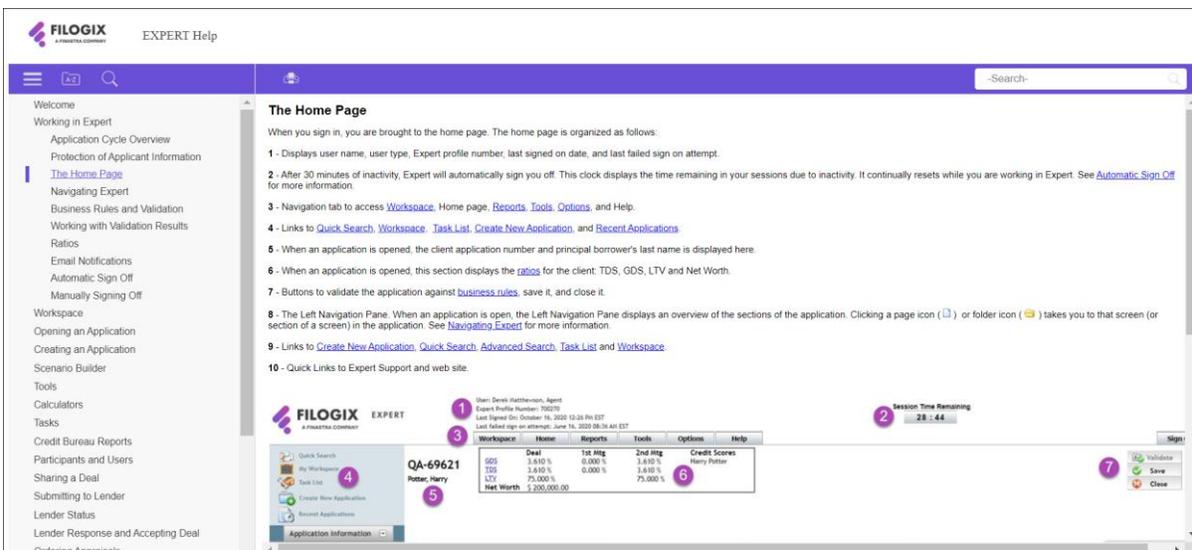
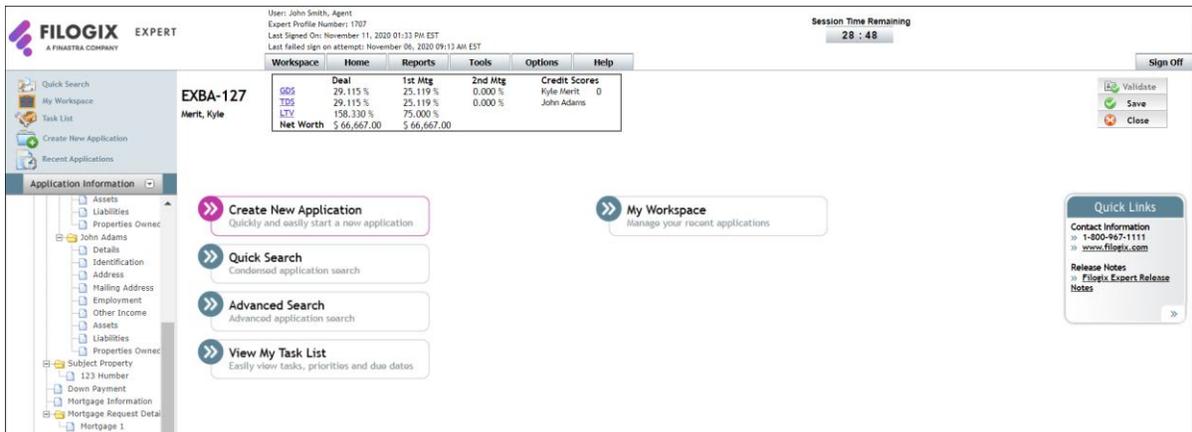
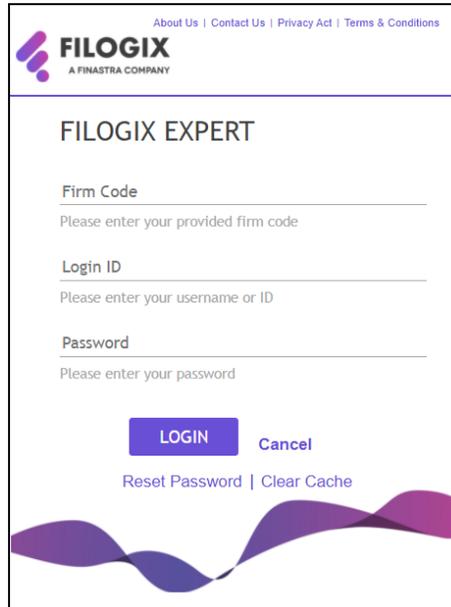
Addition of Rate Type to the Mortgage Application Form

The Mortgage Application form now contains the Rate Type value entered in your mortgage application.

EXBA	MORTGAGE APPLICATION	
Nov-11-2020 02:39:15 PM EST	Merit, Kyle	EXBA-127 Page 3 of 3
FINANCING		
Requested Mortgage		
Lender: ATB 5.4	Product Name:	Loan Type: Mortgage
Purpose: Refinance - ppurpose	Mortgage Type: First	Closing Date: Dec-08-20
Payment Frequency: Monthly	Purchase/Value: \$ 400,000.00	Insurance Premium: \$ 0.00
Monthly Payment: \$ 1,345.85	Total Mortgage Amount: \$ 300,000.00	Net Rate: 2.500%
Rate Type: Fixed	Term: 5 Years	Amortization: 25 Years
Repayment Type: Principal And Interest		
Down Payment		
Source	Description	Amount
Personal Cash	savings	\$ 100,000.00
Total		\$ 100,000.00
Existing Mortgages		
Mortgage Type: Second	Mortgage Balance: \$ 333,333.00	Frequency Payment: \$ 333.00
Maturity Date: Oct-20-22	Rate Type: Fixed	Term Type: Closed
Mortgage Holder: rbc		Mtg Interest Rate: 9.870%
Original Mtg Amt.: \$ 44,444.00	Mortgage #: 12345	Loan Type: Mortgage

Rebranding

Various elements within Filogix Expert have been updated to reflect the updated branding of Filogix. You'll notice cosmetic updates to the login screen, main pages, help files, etc.



Maintenance Items

Lender Drop Down Width and Ordering

In order to reduce wrapping of lender's with longer names, the lender drop down on the Lender Submit screen has been made wider. The ordering of lender names has also been updated to exclude case sensitivity.

Quick Links – Release Notes

You are now able to access Filogix Expert release notes using the Quick Links window on the right side of your home page.

Credit Bureau Business Rules

We have added hyperlinks, within the message text, to rules that relate to the credit bureau (missing, age, etc). This allows you to quickly access the Credit Bureau page when one of these rules fire.

Changes to Reflect the New Regulator in Quebec

Minor updates have been made to forms to reflect the new Quebec regulator (from OACIQ to AMF).



The future of digital finance can start here.
Consider our planet before printing.

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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