

MORTGAGE ORIGINATION SOLUTIONS

					
Independently Owned Technology Platform	✓	X	✓	✓	✓
Submit to all lenders	✓	✓	✓	✓	✓
Filogix Expert Integration	✓	X	N/A	✓	✓
Aggregated Reporting (Expert & DOS)	✓	X	X	X	X
Client Journey (Mortgage App & Doc Portal)	✓	✓	X	✓	✓
Property Appraisals & AVM's (FNF/OPTA)	✓	X	X	X	X
Adhoc Email Campaign Management	✓	✓	X	✓	✓
Deal Dashboard/Pipeline	✓	✓	X	✓	✓
Real Time Push & Pull API	✓	✓	X	X	X
Activities & Task Management	✓	✓	X	X	✓
Conditions Management	✓	✓	X	✓	✓
Forms Generation & Unlimited Document Storage	✓	✓	✓*	✓	✓
Compliance Document Creation	✓	✓	X	✓	✓
Any Device/Any Browser	✓	✓	X	✓	✓
Custom Branding	✓	X	X	✓	✓
Data Ownership, Security & Privacy	✓	✓**	✓**	✓**	✓**
Creditor Insurance (MPP & Canada Life)	✓	✓	✓	✓	✓
Calculators	✓	X	✓	✓	✓
Database Synchronization with Expert	✓	✓	✓	✓	✓
Request Credit Bureau (Equifax & TransUnion)	✓	✓	✓	✓	✓
Connect to External CRM	✓	✓	X	✓	✓
Automated Document Requests	✓	X	X	✓	✓
Outlook & Google Synchronization (Email, Calendar, Contacts)	✓	X	X	X	✓
Priority Live Support	✓	X	X	✓	✓
Customized Reports & Data Mining	✓	X	X	X	X
Zapier Integration	✓	✓	X	✓	X
Automated Workflow	✓	X	X	X	✓
Integrated CRM & Lead Management	✓	X	X	X	✓
Downpayment/Bank Acct Verification*	✓*	✓	X	✓	✓
Digital Signature/eSign Integration*	✓*	✓	X	✓	✓
Payroll Source Deduction/Commissions*	✓*	X	X	X	X
Payroll Integration/Automation*	✓*	X	X	X	X
CRA Document Ordering*	✓*	✓	✓	✓	✓
Compliance Process & Workflow*	✓*	✓	X	✓	X

*Indicates pay-for-use /upgraded subscription ** MPP only

Feature comparisons are based on available information and subject to change without notice