



# filogix exchange™

The next generation in collaborative document management solutions.



## Exchange 2.0

facilitates secure collaboration on mortgage documents between Originators and Lenders.



### COLLECT

Collect all the critical documents for the mortgage deal and store them in one central location.

Fax or upload documents directly into a folder and receive automatic email confirmation of delivery.



### PROTECT

Ensure your documents are secure and grant the right people access to the right documents.

Ensures compliance with internal and external requirements.



### COLLABORATE

The ability to share and collaborate with all those that touch the deal. Not only a time-saver, but ensure accuracy of the mortgage.

- Leave comments
- Send documents back & forth
- Share documents via fax and email
- Automatic email confirmations



### STORE

Store all deal documents in a secure, electronic format and gain access whenever and wherever you are.

Documents are stored without a restriction on size, number of pages, or file type for as long as you require.



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## Top 10 Reasons to use Exchange 2.0

1. Unique ability for Originators and Lenders to collaborate on deals (i.e. 2-way chat, transmit documents)

2. Immediately realize increases in productivity, decreases in administration and as a result, cost-savings.

3. Move one step closer to the paperless office, which is not only a benefit for the environment, but also reduces your storage costs.

4. Keep all your deal documents in one central location, without a restriction on size, number of pages, or file type. Store documents for as long as you need!

5. Automated email notifications are another great feature of Exchange 2.0. Email notifications can be set-up through Exchange to notify you when documents arrive, are updated, etc.

6. Access your deal documents anytime and anywhere. Exchange 2.0 is web-based and therefore, you can log in wherever where you are.

7. Exchange's simple interface is intuitive and easy to learn.

Minimal requirements for training before your staff can start taking advantage of Exchange.

8. Ensuring compliance through:

- Storing documents in a central location that provides controlled and audited staff access,

- Increasing the ability to detect fraud/ forgery,

- Enforcing internal reviews and auditing policies,

- Eliminating document duplicates and manual entry errors

9. Take advantage of the seamless integration with Filogix Expert®, our mortgage origination solution. Users of Expert will sign-in and gain access automatically. Both Expert and Filogix Express® (our Lender underwriting solution), offer automatic folder creation to minimize manual work.

10. Exceeds industry/ governmental security and regulatory standards, to ensure your data is always well protected.

To request a demo,  
please email:  
[lendersales@filogix.com](mailto:lendersales@filogix.com) or  
[mortgagebroker@filogix.com](mailto:mortgagebroker@filogix.com)

Technology platform  
provided by leader in  
document management:

OPENTEXT  
The Content Experts™

