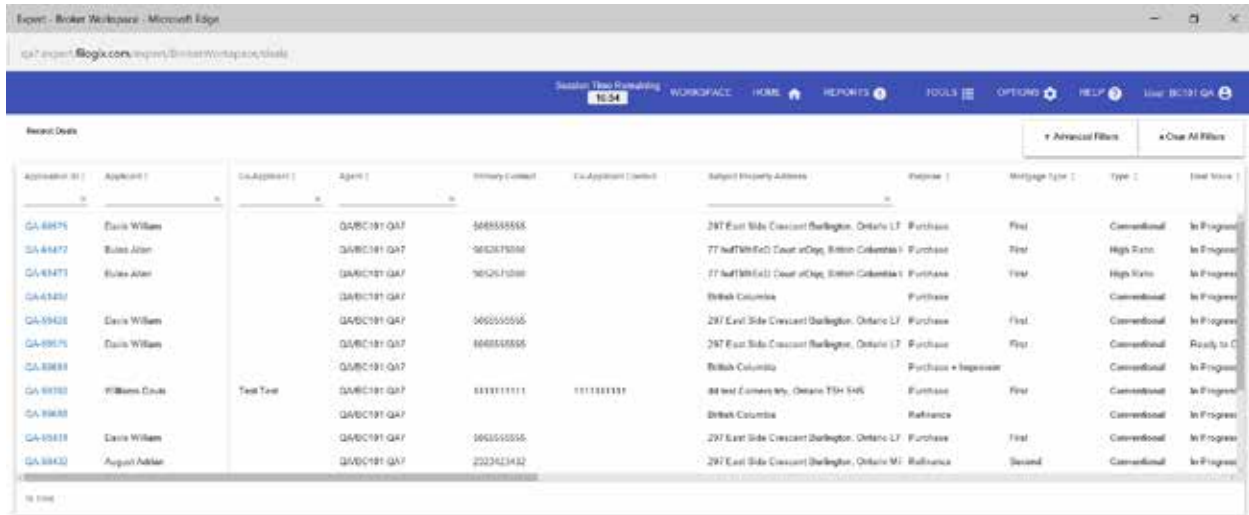


The December 2017 release for Expert introduces “My Workspace”, which is a new screen that allows you to quickly view and open your current deals. Workspace holds up to 200 of your most recent deals organized in a grid format with various filtering and sorting options to determine how the deals display for you.

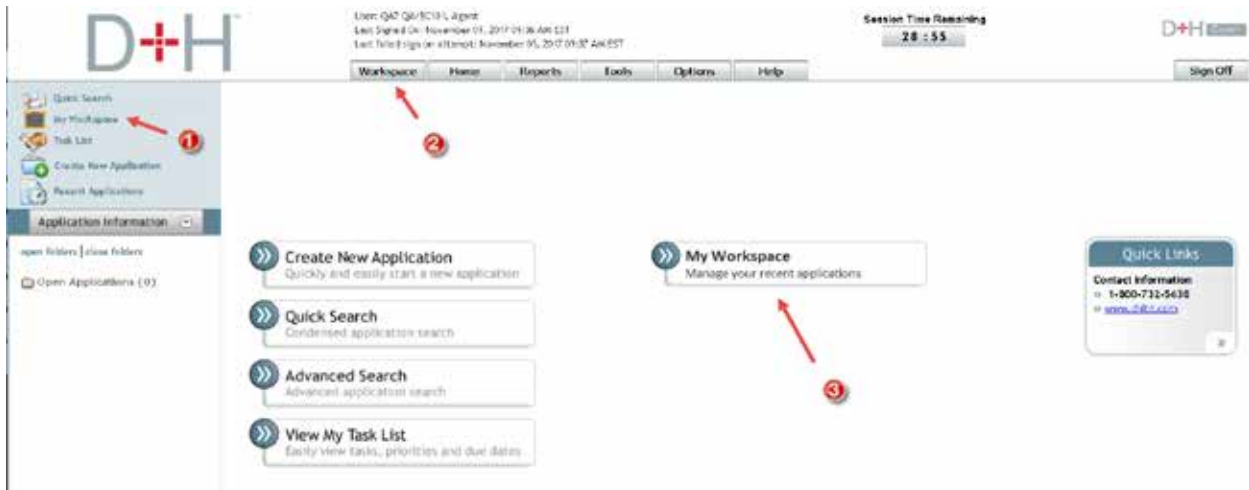


Application ID	Applicant	CA/Agent	Agent	Primary Contact	Co-Agent/Contact	Subject Property Address	Proposal	Mortgage Type	Type	Deal Stage
CA-48475	David Wilson	QAVC191-CA7	QAVC191-CA7	548555555		287 East Side Crescent Burlington, Ontario L7	Purchase	First	Conventional	In Progress
CA-48472	Brian Allen	QAVC191-CA7	QAVC191-CA7	965267888		77 Half Mile Court in Opa, British Columbia	Purchase	First	High Rate	In Progress
CA-48473	Brian Allen	QAVC191-CA7	QAVC191-CA7	965267888		77 Half Mile Court in Opa, British Columbia	Purchase	First	High Rate	In Progress
CA-48429		QAVC191-CA7	QAVC191-CA7			British Columbia	Purchase		Conventional	In Progress
CA-48428	David Wilson	QAVC191-CA7	QAVC191-CA7	548555555		287 East Side Crescent Burlington, Ontario L7	Purchase	First	Conventional	In Progress
CA-48476	David Wilson	QAVC191-CA7	QAVC191-CA7	548555555		287 East Side Crescent Burlington, Ontario L7	Purchase	First	Conventional	Ready to C
CA-48488		QAVC191-CA7	QAVC191-CA7			British Columbia	Purchase + Refinance		Conventional	In Progress
CA-48489	William Cook	Test Test	QAVC191-CA7	811111111	111111111	88 West Cameron Way, Ontario T5H 5H5	Purchase	First	Conventional	In Progress
CA-48488		QAVC191-CA7	QAVC191-CA7			British Columbia			Conventional	In Progress
CA-48489	David Wilson	QAVC191-CA7	QAVC191-CA7	548555555		287 East Side Crescent Burlington, Ontario L7	Purchase	First	Conventional	In Progress
CA-48430	August Adler	QAVC191-CA7	QAVC191-CA7	222343432		297 East Side Crescent Burlington, Ontario M1	Refinance	Second	Conventional	In Progress

Opening Workspace

Workspace can be quickly opened from the following areas:

- The new Workspace link (1) in the existing links section at the top left of Expert.
- The new Workspace tab (2) and the new Workspace link (3) on the Home page of Expert.




Workspace opens in a separate screen that can be maximized to fully display on your monitor. Note that because Workspace was developed using “responsive design”, it looks different from the rest of Expert.

Workspace Functionality

Full details of the Workspace functionality are explained in the Expert Help. What follows are brief summaries of each function.

Opening a Deal

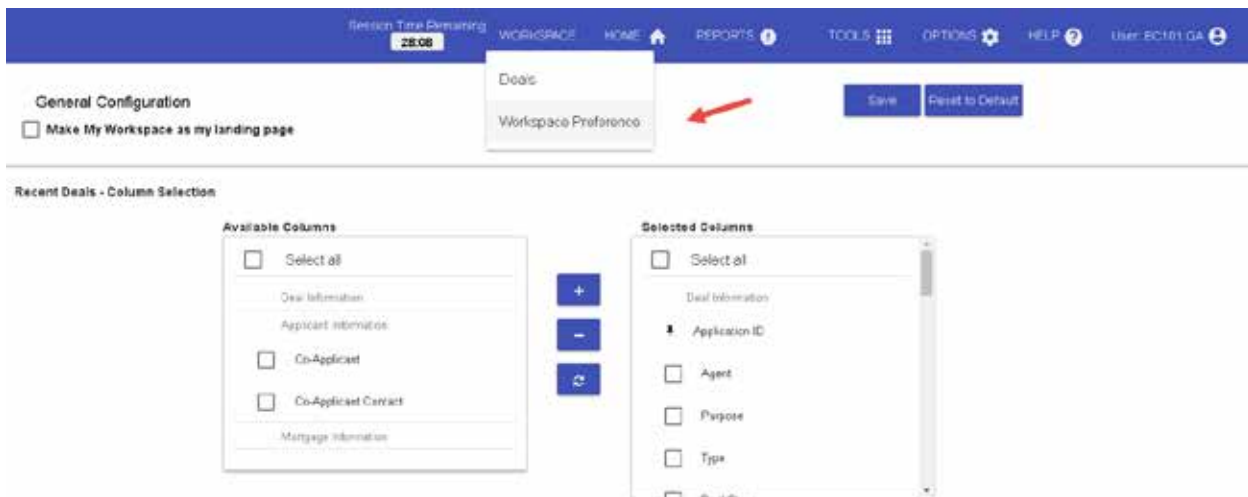
A deal is opened by clicking its Application ID link.



Application ID	Applicant	Agent	Primary Contact	Subject Property Address	Purpose
QA-59575	Davis William	GA/BC101 QA7	5065555555	297 East Side Crescent Burlington, Ontario L7R 4K7	Purchase
QA-61472	Buras Allan	GA/BC101 QA7	9052673003	77 huffmireld Court rdDug, British Columbia	Purchase

Column Selection

By default, Workspace displays deal information in 30 columns, but it is up to you to determine which columns to display. This is easily done through the Column Selection function, which is accessed via **Workspace > Workspace Preferences**.¹



Recent Deals - Column Selection

Available Columns

- Select all
- Deal Information
- Applicant Information
- Co-Applicant
- Co-Applicant Contact
- Mortgage Information

+

-

↻

Selected Columns

- Select all
- Deal Information
- Application ID
- Agent
- Purpose
- Type

¹ Certain columns (Application ID, Applicant, and Mortgage) are fixed and therefore cannot be hidden via the Column Selection function.

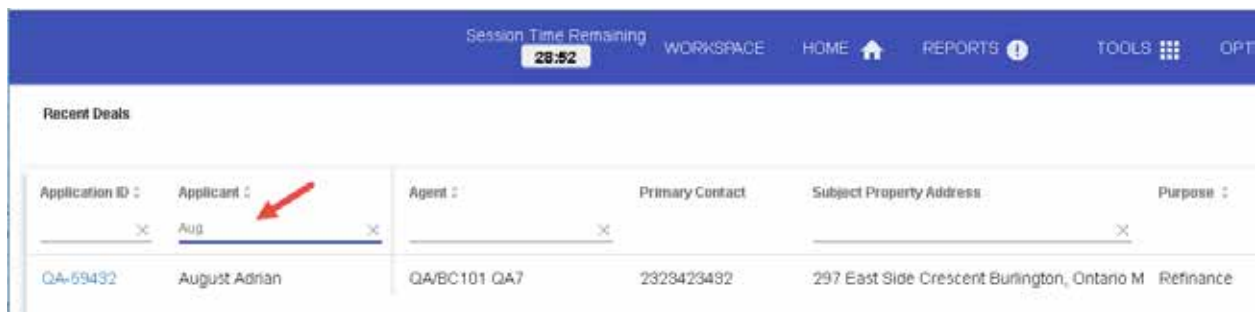
Sizing the Column Width

The width of the columns can be expanded or contracted by selecting the border between a column header and adjusting it to the left or right accordingly.

Primary Contact	Subject Property Address	Purpose
4356878934	34-3875 sheppard Avenue E, Toronto, Ontario	Refinance
4356878934	34-3875 sheppard Avenue E, Toronto, Ontario	Refinance
4160009022	31-33 Nikhil Ridge E, RBC, Alberta T6T 6H4	Purchase
4444444444	12-121 Property Owned Abbey S. NBurn, New	Refinance

Filtering via Column Values

Certain columns have filtering functionality, meaning you can type a value and then only deals that have that value display in Workspace. The example screen shot below shows the Applicant column being used as a filter. The screen refreshes in real-time with results as soon as you begin to type.

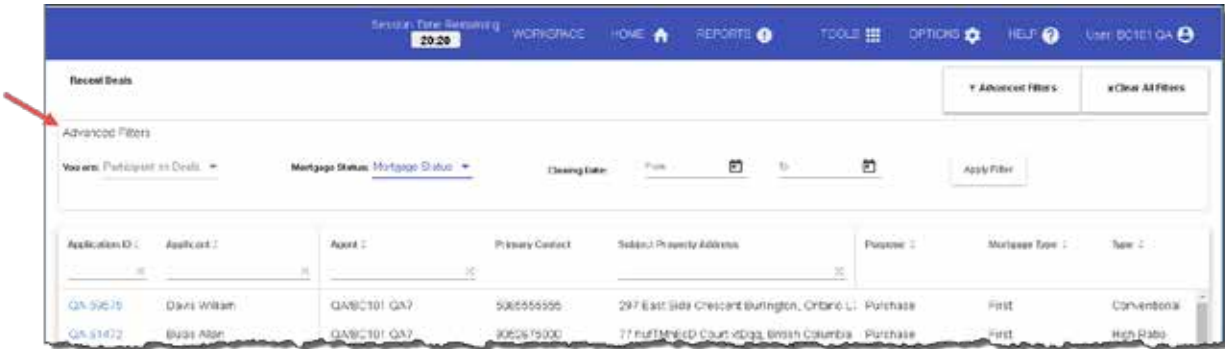


Application ID	Applicant	Agent	Primary Contact	Subject Property Address	Purpose
QA-59432	August Adrian	QA/BC101 QA7	2323423432	297 East Side Crescent Burlington, Ontario M	Refinance

Advanced Filters

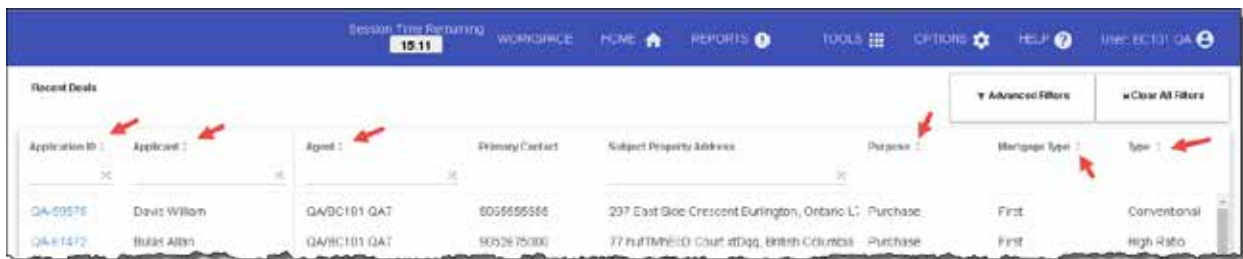
Advanced filters allows you to filter deals by the values selected for the following categories:

- Participants on Deals (Agent, Submission Agent, Administrator, Associate, Reviewer, Co-Agent, Assistant)
- Mortgage Status (In Progress, Submitted, Ready to Submit, Approved, Accepted, Declined)
- Closing Date Range (To and From)



Sorting Deals

Clicking the up/down arrows (⇅) adjacent to a column title sorts the Workspace deals in either ascending or descending order of that column. Note that not all columns have this sorting capability.

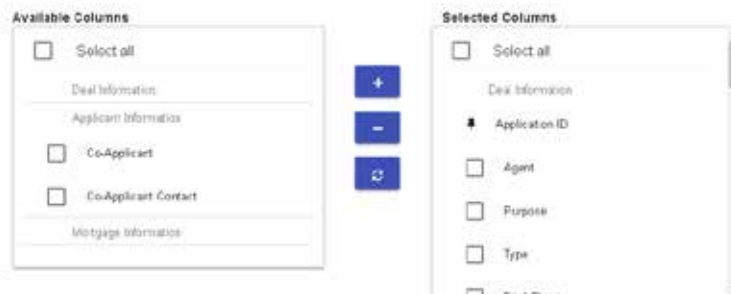


Making Workspace the Landing Page

You can make Workspace the first page you see when you sign in to Expert. This is done by selecting the **Make My Workspace as my landing page** check box, which is accessed via **Workspace > Workspace Preferences**.



Recent Deals - Column Selection

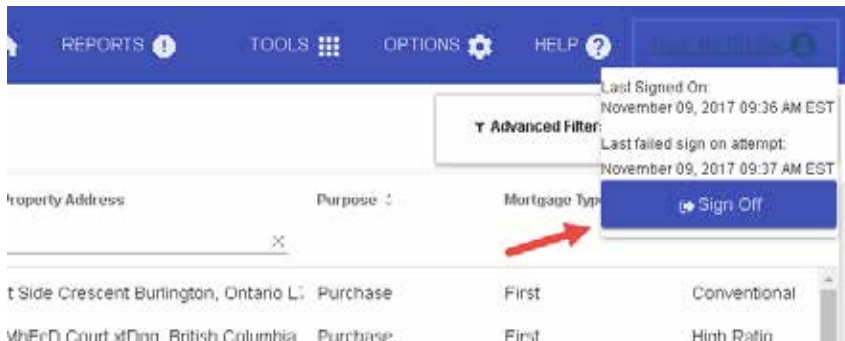


Top Menu Panel

Workspace consists of a menu panel at top that provides access to other Expert screens.



From the menu panel, you can also sign out of the Expert application.



Maintenance Items

Quebec Exclusive Service Contract Form

- For the Quebec Exclusive Service Contract form, the text “elle” has been replaced by “l’Agence”, and “il” has been replaced by “le Courtier”.
- The OACIQ text now appears before the signature lines.

BC Form 10

- The BC Form 10 is now auto-populated with the Lot, Block, and Conc.Township values from the Subject Property Information section of Expert.

Deals in Complete Status

Addressed issue in which deals with a status of Complete were not in view-only mode. In addition, for a deal with status of Complete, the **Validate** and **Submit** buttons on the Lender Submit screen are no longer enabled.