



FUSION MORTGAGEBOTPOS™ DOCEXCHANGE

Securely Upload and Integrate Documentation Directly Into Your Fusion MortgagebotPOS™ Loan Application



Doc Exchange also allows Loan officers to provide borrowers with needed forms and detailed instructions through a secure means of sending and receiving.”

Even the most efficient origination process can be held up due to waiting for documentation.

DocExchange function is an efficient add-on to LoanStatus that seamlessly ties into the Fusion MortgagebotPOS™ solution, making it simple for borrowers and lenders to upload, download and share any and all needed files and instructions throughout the application process.

Timing is key

Fusion MortgagebotPOS identifies the documentation needed based on answers within the application. This documentation, such as bank statements, W-2s, etc., are displayed in the “Items Needed From You” screen.

When DocExchange is enabled, an “Upload” button will appear next to the necessary items. Your customers will then be guided through the upload process – without having to leave the program – and securely transfer needed files, which the system confirms and logs with the date.

Once the documents have been uploaded, your assigned lending team is immediately

alerted with an email. They can then access the uploaded documents via the Document Center portal in Fusion MortgagebotPOS PowerManager, and distribute and file them as needed.

DocExchange also allows loan officers to provide borrowers with needed forms and detailed instructions, as well as a secure means of sending and receiving them. Borrowers automatically receive an email alerting them of these lender requests as well.

Speed-up the process with DocExchange

Now your customers no longer need to leave the secured application environment and risk sending sensitive information through insecure channels



I was incredibly impressed with the ease of the implementation of the DocExchange functionality. ”

Shannon Williams

Systems Training Coordinator
First Equity Mortgage.

The screenshot displays two sections of the DocExchange interface. The top section, titled 'Items Needed From You', lists documents required for application completion. It includes a table with columns for 'Item Needed', 'Requested', 'Received', and 'Uploaded', along with an 'Upload' button for each item. The bottom section, titled 'Secure Document Center', shows a 'Secure Document Upload' area with a table for 'File Description' and 'Upload Date', and an 'Upload Document' button.

Item Needed	Requested	Received	Uploaded	
W2s For 2014	2/12/2015	2/19/2015		Upload
Signed 1040s Complete With Schedules for Laura	2/12/2015			Upload
Source Of Funds for Provide Paper Trail	2/12/2015			Upload
X Signed Final 1003 - Signed Date of Close	2/12/2015		2/19/2015	
X Final TIL	2/12/2015			Upload

File Description	Upload Date
W-2	2/19/2015
1040's	2/19/2015

Efficiency advantages

All of the customer's private documentation is seamlessly and securely transferred.

In addition, DocExchange automatically matches uploaded documentation to the proper application, eliminating time spent manually sorting, routing and filing.

When integrated into your Fusion MortgagebotPOS solution, DocExchange gives today's customers the 24-hour convenience and security they expect in the modern online banking experience, empowers loan officers to manage the mortgage process more quickly and productively, and keeps communication clear and open between lenders and borrowers.

"I was incredibly impressed with the ease of the implementation of the DocExchange functionality. It does not require extensive training or changes in processing procedures. DocExchange gives our company the ability to instantly and seamlessly receive source documents from the borrower. It also eliminates multiple calls and emails between the borrower and loan representative regarding what documents have been received and what items are still needed." said Shannon Williams, Systems Training Coordinator, First Equity Mortgage.

The solution for all of your lending technology needs

Dynamic. Fusion MortgagebotPOS personalizes the application “path” based on borrower-specific information, loan type and more. Fusion MortgagebotLOS is configurable by user type, institution and products, and offers a built-in workflow to streamline all processing requirements.

Accurate. Correctly handles all product, fee and pricing details and ensures that when applications are submitted via the consumer direct channel, only completed applications are accepted, minimizing wasted time and resources.

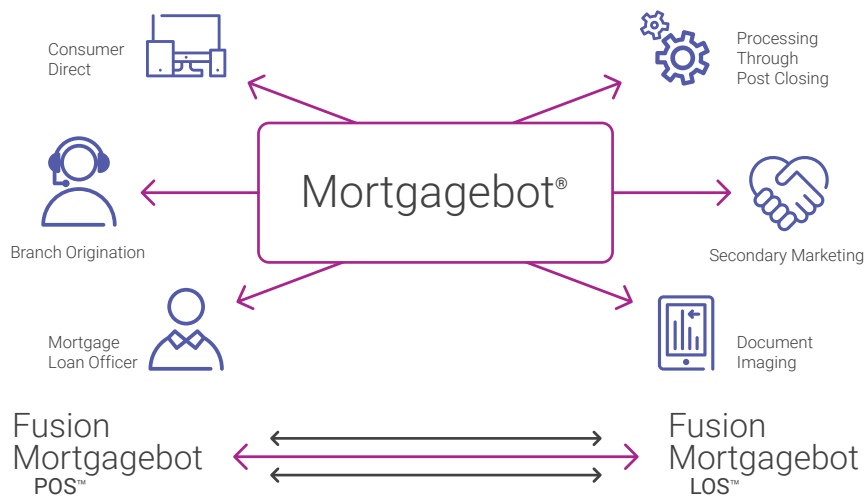
Integrated. Completed applications can flow directly from Fusion MortgagebotPOS into Fusion MortgagebotLOS for processing, closing, imaging and secondary marketing or into third-party loan origination systems.

Connected. Links directly to automated underwriting systems, credit-reporting solutions, fraud-detection products, AU, flood zone determination, MI, appraisal, compliance check and loan documents.

Compliant. Aggressively maintained and enhanced to ensure the platform complies with all regulatory changes.

Secure. Protects sensitive borrower information with redundant back-up systems, multi-level data security and rigorous independent audits.

Reliable. Supported by our dedicated team of professionals with rich technical knowledge and extensive lending experience to deliver a rapid,



Automate every point-of-sale channel where business is captured: consumer direct, branch and loan officer.

Integrate directly into the all-in-one, web-based system for processing, closing, imaging and secondary marketing.

proven implementation along with outstanding service.

About Mortgagebot

More than 1,400 clients nationwide are using the robust, scalable, easy-to-use Mortgagebot platform for automating loan applications, pricing, approvals, disclosures as well as processing, closing, imaging and secondary marketing.

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today – spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location – from global financial institutions, to community banks and credit unions. Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 48 of the world's top 50 banks use Finastra technology. Please visit finastra.com

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