



Mortgage Fundamentals Training Brochure

(Introductory, Advanced and Mitigation)

Training to suit your level of expertise

Introductory training

Advanced training

Mitigation training

Background

We have a hands-on approach to training and have 3 different courses which aim to deliver different objectives which we believe cover all aspects of use within Mortgage Fundamentals. Full telephone support is given to all customers who have received the proper training on Mortgage Fundamentals. It is crucial that Mortgage Fundamentals is used correctly and in this respect no support can be given unless strict training procedures are followed.

Objectives

We at Exasoft want all users to get the maximum benefit from using Mortgage Fundamentals. Following full training, users will understand more about the system which in turn should help improve productivity and efficiency as well as enabling a wider variety of cases to be processed.

Please note that the courses are based around expertise on Mortgage Fundamentals and that the Advanced or Mitigation courses are very much geared towards delegates who have been using Mortgage Fundamentals for some time and who are familiar with the system.

Introductory training

This course works through several examples with the aim of ensuring that delegates are familiar with the entry of case information and checking of cases. Working through basic cases you will quickly learn how to input customer specific adjustments and how to check your results.

We recommend that new users go back to their work environment to work with Mortgage Fundamentals and once they feel comfortable with the system an advanced course should be booked. This will ensure that you as a company get the most from your users.

Advanced training (2+ months experience)

This course builds on the foundations of the Introductory Training Course and cases that delegates have been processing in their daily role. We encourage delegates to provide us with areas that they wish to focus on during the day. This can include providing us with case specifics so that these can be worked through on the day. A variety of scenarios are covered which enables users to work through areas such as split loans, method change, dual rates, over and under payments, deferred mortgages, interest table change for example changing to a tracker rate.

Mitigation training (2+ months experience)

This course looks at the new mitigation sections of Mortgage Fundamentals, exploring the different setup options and various scenario's. Working through case scenario's enables case handlers to experience how cases can be placed into Mortgage Fundamentals while having the opportunity to discuss how to maximize their use of the system.

Continually updating

Mortgage Fundamentals is continually being updated and the advanced training accommodates the very latest changes allowing you to practice using them and fully understand them. We do recommend that all companies send at the very least one representative every 6-9 months for additional training to ensure they are getting the very best out of Mortgage Fundamentals.

Feedback

Being heavily focused on improving Mortgage Fundamentals all user feedback is most welcome. During these sessions or at any other time to let us know of improvements you would like to see in the system.

Certification

We now offer companies the opportunity to get staff members tested on their use of Mortgage Fundamentals. Please see our Mortgage Fundamentals Certification brochure for more information.