



MAGENTA CAPITAL CORPORATION

Broker Portal User Guide

April 22, 2024





Login

Sign In

[Forgot
password?](#)

Contents

-
1. A More Streamlined File Workflow

 2. Creating an Account

 3. Using the Portal

 4. Uploading Documents: Submitted File

 5. Uploading Documents: Conditioned File

 6. Resetting or Forgetting Password





Mortgage Broker Portal



Easy Document Uploading



File Status Updates

LOGIN

File Workflow



- ✓ Easy document uploading
- ✓ File status updates
- ✓ 24/7 login for file access

A more streamlined process:

- 1 **Submit** a file
- 2 **Confirmation of Application Received & Underwriter Assigned** email
- 3 **One time Broker Portal Setup Account Activation** email
- 4 **Commitment Out** email
- 5 **Sign Back Received** email
- 6 **Documents Reviewed: Updated Conditions** email
 - Notes, status and instructions will be updated in the portal
- 7 **Documents Reviewed Broker Complete** email
 - Status will update in portal

Optional Follow up survey. Your feedback helps us improve!



1. Welcome Emails

1 Application Received email

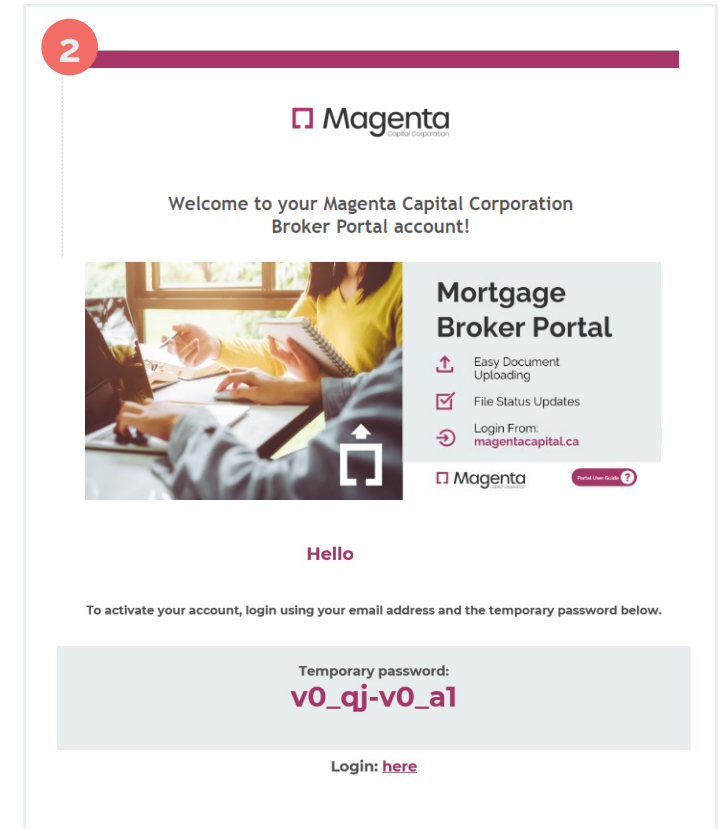
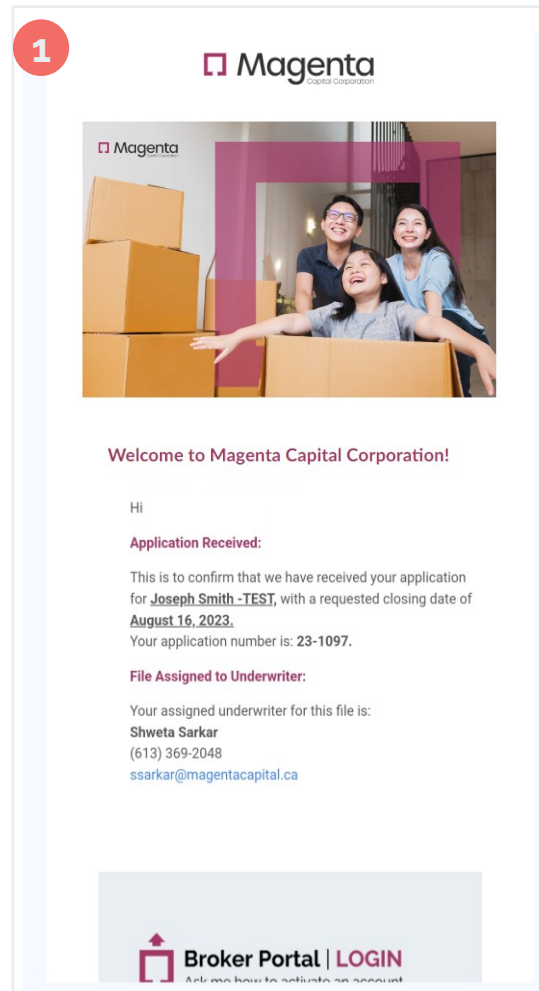
When you submit a file to Magenta you will receive a **Welcome to Magenta Capital Corporation** email with confirmation that your **Application was Received** and **Assigned to an Underwriter**.

You will also have the option to login to the broker portal if you already have an account.

2 Account Setup email

You will receive an account setup email **shortly after the Application Received email**.

Use the temporary password and link to create your account (Instructions on the next page)



1. Setting up An Account

1

LOGIN

Use the login link at the bottom of the email, or login any time at broker-portal.magentacapital.ca (a Login button is available on the Magenta website)

2

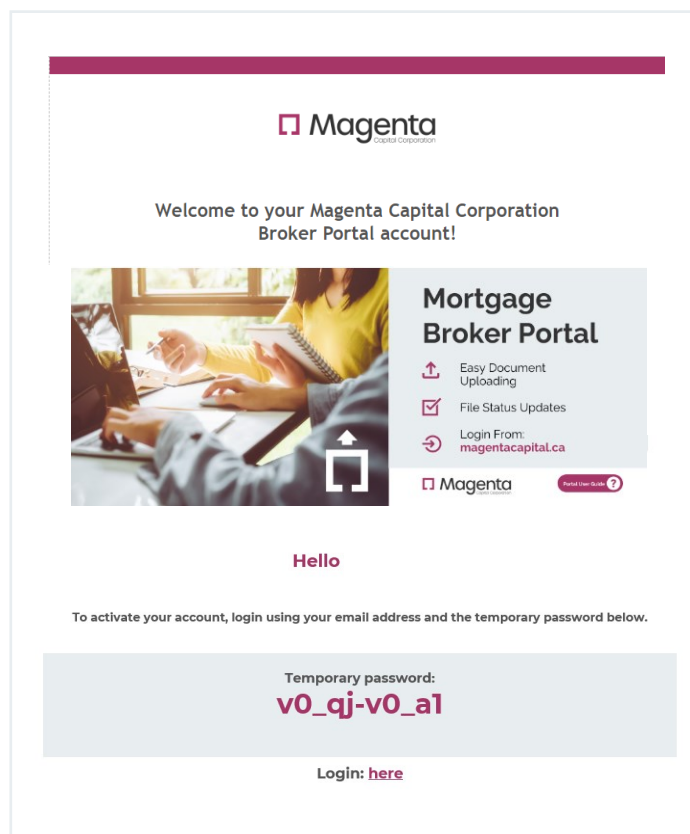
Use the Temporary Password to setup your account

Copy the temporary password you received in the welcome email.

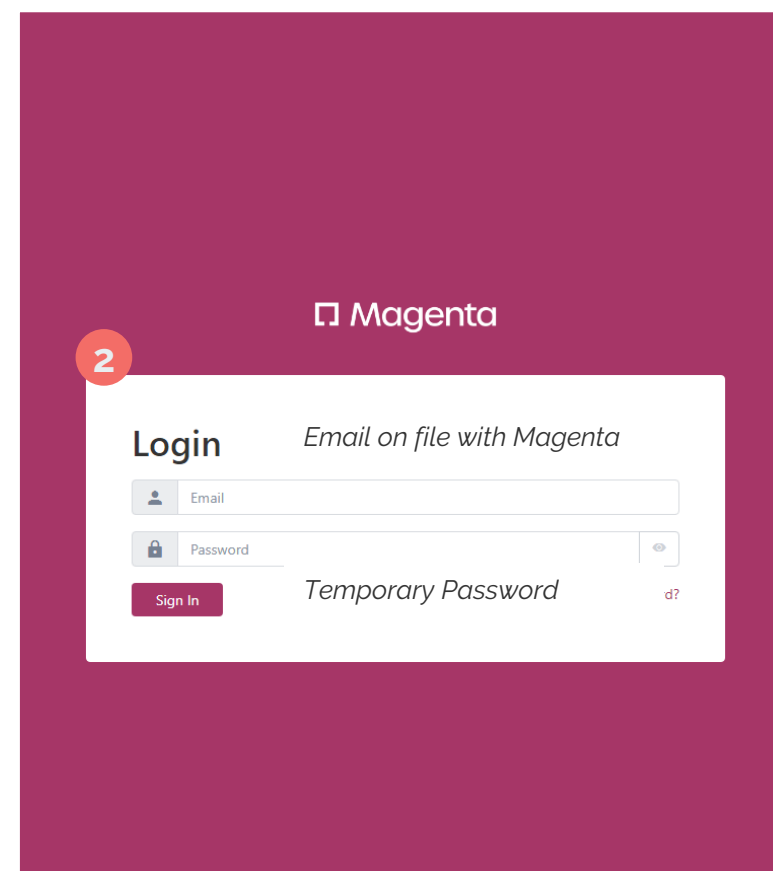
Paste the password into the login screen. Your username will be the email you have on file with Magenta

You will then be prompted to make your custom password. This will be your login information going forward.

1



2



3. Using the Portal & Status Updates

1 MY LOANS

Once you log in to the portal you will arrive at your **My Loans** page.

This will be your Home page to view high-level lists of your Magenta files.

Use the file status **tabs (In Progress, Terminated)** to change the list view.

File Information available on the home page view:

1. File name and number
2. Borrower name and property address
3. Estimated loan amount
4. Estimated closing date
5. File creation date
6. File substatus + when it was updated
7. Funding Fees Earned

1 MY LOANS

Magenta

Home

My Loans

My Account

Mortgage Loan Details

In Progress Terminated

File Status Tabs

File Name	Borrower(s)	Property Address	Estimated Loan Amount	Estimated Closing Date	Creation Date	Substatus	Substatus Updated Date	Funding Fees Earned
23-1097 (R) - SMITH TEST MTG	Joseph Smith - TEST Testing One Finastra Molly Maclellan	123 TEST St Toronto ON CA	--	August 16, 2023	April 3, 2023	Imports	February 5, 2024	\$0.00

Your Mortgage Files in Progress

Click File Name to get to Document Upload View



Uploading Documents: Submitted

1 MY LOANS > MORTGAGE DETAILS

Outstanding Conditions and Documents section

Standard Document Fields:
Standard condition fields required on all file submissions are available:

Appraisal Report

Signed Commitment Letter

Any Other Supporting Documents:
Upload any other documents you would like considered on initial review.

Conditioned Fields will populate once the file has been approved. See next page.

1 MY LOANS > MORTGAGE DETAILS

The screenshot shows the 'MY LOANS > MORTGAGE DETAILS' page for loan 15160 - 23-1097 (R) - SMITH TEST MTG. The page includes a navigation menu with 'My Loans' and 'My Account'. The main content area displays the loan title and a table of details. Below this is the 'Outstanding Conditions & Documents' section, which lists three document types: 'Appraisal Report' (Approved), 'Signed Commitment Letter' (Changes Needed), and 'Any Other Supporting Documents'. Each document type has an 'upload files' button. A red box highlights the 'Outstanding Conditions & Documents' section, and a red arrow points to it from the right.

broker-portal.magentacapital.ca/?cmd=loans&loanid=694460

Home / 15160 - 23-1097 (R) - SMITH TEST MTG

15160 - 23-1097 (R) - SMITH TEST MTG | Mortgage Details

This loan is currently in progress - Imports Last updated on: February 5, 2024

Borrower(s)	Primary Property Address	Loan Amount
Joseph Smith -TEST Testing One Finastra Molly Maclellan	123 TEST St Toronto ON CA M6E3C5	\$ 0.00
Interest Type	Interest Rate	Funding Fees Earned
Principal & Interest. Amortized over 50 years	8.99 %	\$0.00

Outstanding Conditions & Documents

Appraisal Report Full Appraisal Report completed by an Appraiser on Magenta's Approved Appraise List. Market Rents to be included if applicable.	Approved	MATest_15160_Smith-TEST_2024-02-29.pdf	upload files
Signed Commitment Letter ***Require Borrower #2 to sign as well***	Changes Needed	Toronto_Office_Orientation_-_October_23.pdf	upload files
Any Other Supporting Documents To be used for documents submitted prior to Commitment being issued and loan being fully conditioned			upload files

Standard Documents Fields Are available for upload.



5. Uploading Documents: Conditioned

1 MY LOANS > MORTGAGE DETAILS

After approval, the required condition and document fields will populate in the file with the following status indicators:

Document Condition Statuses

Waiting for Review

Appears when a document is successfully uploaded.

Reviewing

Appears when document is under review.

Changes Needed

****Notes** will be provided on required updates. Please see the example in the Signed Commitment Letter Field on the right.

Approved

Document is accepted
****Notes** will be provided if additional documents are required to fully satisfy the condition.

Rejected

Document is not accepted.
****Notes** will be provided to advise why the file was rejected and what document(s) is required.

1 MY LOANS > MORTGAGE DETAILS

The screenshot shows a web browser window with the URL `broker-portal.magentacapital.ca/?cmd=loans&loanid=694460`. The page title is "15160 - 23-1097 (R) -SMITH TEST MTG | Mortgage Details". A navigation sidebar on the left includes "My Loans" and "My Account". A yellow banner at the top states "This loan is currently in progress - Imports" with a "Last updated on: February 5, 2024" timestamp. Below this is a table with three columns: Borrower(s), Primary Property Address, and Loan Amount. The table contains the following data:

Borrower(s)	Primary Property Address	Loan Amount
Joseph Smith -TEST Testing One Finastra Molly Maclellan	123 TEST St Toronto ON CA M6E3C5	\$ 0.00

Interest Type	Interest Rate	Funding Fees Earned
Principal & Interest, Amortized over 50 years	8.99 %	\$0.00

The "Outstanding Conditions & Documents" section is highlighted with a red box and a red arrow pointing to it from the right. It contains three entries:

- Appraisal Report**: Status "Approved" (green pill), file name "MATest_15160_Smith-TEST_2024-02-29.pdf", and an "upload files" button.
- Signed Commitment Letter**: Status "Changes Needed" (orange pill), file name "Toronto_Office_Orientation_-_October_23.pdf", and an "upload files" button. A note below reads: "***Require Borrower #2 to sign as well***".
- Any Other Supporting Documents**: Status "Changes Needed" (orange pill), and an "upload files" button. A note below reads: "To be used for documents submitted prior to Commitment being issued and loan being fully conditioned".

Required Documents to fulfill file will show up in this field with status updates

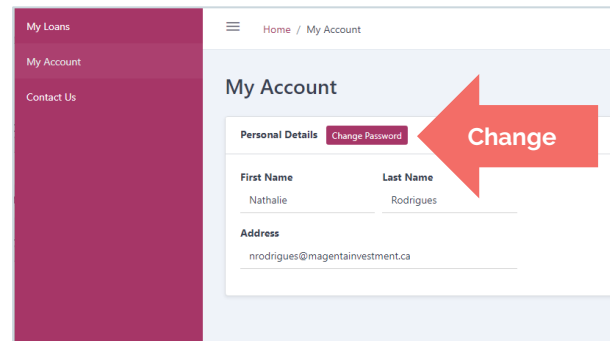


6. Resetting or Forgetting Password

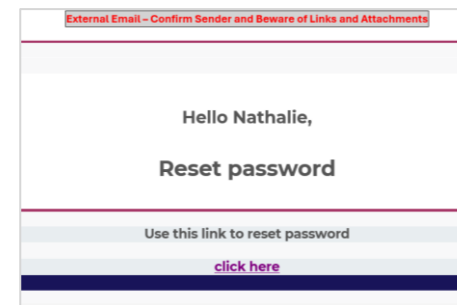
1 MY ACCOUNT Resetting Password

1. In the "Account" page in the portal, click "Change Password" button.
2. An email will be sent to the email on file with a reset link.
3. Reset the Password at the link provided.

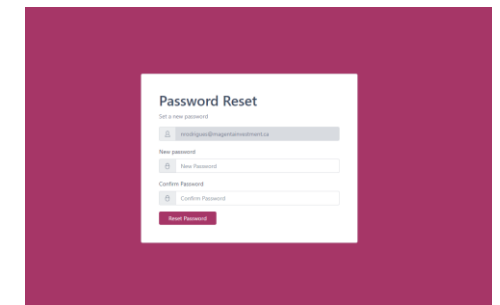
1 MY ACCOUNT



Reset Password Email



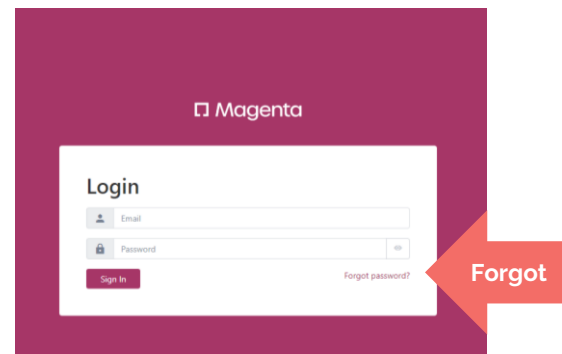
Password Reset Link



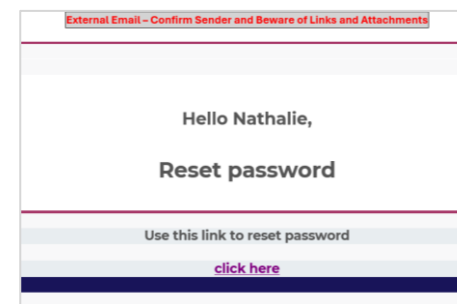
2 LOGIN PAGE Forgetting Password

1. In the "Login" page, click "Forgot Password?" button.
2. An email will be sent to the email on file with a reset link.
3. Reset the Password at the link provided.

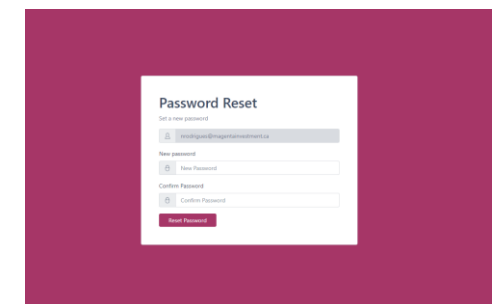
2 LOGIN



Reset Password Email



Password Reset Link





Your tomorrow matters

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