

Now Available: Expanded Renewal Visibility

We've introduced new enhancements designed to give brokers greater visibility into all client mortgage renewal opportunities, not just the requested mortgage tied to the current application.

Dashboard Enhancements

Dashboard renewal views will now include:

- Existing mortgages tied to other client-owned properties
- Existing mortgages associated to refinace or transfer applications
- Improved visibility into upcoming renewal opportunities across a client's broader mortgage portfolio

This enhancement helps brokers identify additional opportunities to reconnect with clients before mortgages mature.

Mortgage Renewals In the next 180 Days for Me

Only Completed applications

Download as CSV

APPLICATION ID	NAME	PROPERTY	MORTGAGE	MORTGAGE TYPE	RENEWAL DATE	
5587	Frank Jones	50 Yarmouth, Guelph, Ontario, N1H 4G3	Requested/Current	Second	Oct 22nd, 2026	View on Board
4096	John G Smith	8-30 Cedar, Brant, Ontario, N3L 0A1	Existing	First	Oct 19th, 2026	View on Board
4099	refi Smith	405-100 Harvest Hills Drive Northeast, Calgary, Alberta, T3K 3K4	Existing	First	Sep 21st, 2026	Add to Board
4098	refi Smith	405-100 Harvest Hills Drive Northeast, Calgary, Alberta, T3K 3K4	Existing	Second	Sep 17th, 2026	Add to Board
4095	refi Smith	8-30 Cedar Street, Brant, Ontario, N3L 0A1	Requested/Current	Second	Sep 17th, 2026	Add to Board
4099	refi Smith	405-100 Harvest Hills Drive Northeast, Calgary, Alberta, T3K 3K4	Requested/Current	Second	Sep 17th, 2026	Add to Board
4098	refi Smith	405-100 Harvest Hills Drive Northeast, Calgary, Alberta, T3K 3K4	Requested/Current	First	Sep 14th, 2026	Add to Board
5419	John King	78 Tecumseth, Toronto, Ontario, M5V 0A9	Requested/Current	First	Jul 30th, 2026	View on Board
9405	John King	78 Tecumseth, Toronto, Ontario, M5V 0A9	Requested/Current	First	Jul 30th, 2026	View on Board
9406	John King	78 Tecumseth, Toronto, Nova Scotia, M5V 0A9	Requested/Current	First	Jul 30th, 2026	View on Board
4092	Sally Field	965-1959 Marine, North Vancouver, British Columbia, V7P 3G1	Requested/Current	First	Jul 23rd, 2026	View on Board
4092	Sally Field	88 Queen Street, Toronto, Ontario, M5C 0B6	Existing	Third	Jul 9th, 2026	View on Board
4089	Bling Diane	4 Bentonwood Crescent, Whitby, Ontario, L1R 3L5	Requested/Current	First	Jul 2nd, 2026	View on Board
4093	King John	78 Tecumseth, Toronto, Ontario, M5V 0A9	Requested/Current	First	Jun 24th, 2026	View on Board
37690	King John	78 Tecumseth, Toronto, Ontario, M5V 0A9	Requested/Current	First	Jun 24th, 2026	View on Board

Renewal Tracking Report Updates

The Renewal Tracking Report within Expert Pro now includes a new Request Type filter, allowing brokers to view:

- All Mortgages
- Existing Mortgages
- Requested Mortgages

This provides greater flexibility when tracking and managing upcoming renewals.

Reports

View and manage all of your Reports.

Applications Summary

Firm Statistics

Renewal Tracking

Lender Transactions

Commissions

Risk Level

Report History

Level

Agent

Format

PDF

Mortgage Type

All

Request Type

All

Existing

Requested

Agent

David Matthews

Lender

All

Maturity Date From

2023-12-12

Date To

Primary Sort

Lender

Secondary Sort

Application ID

Clear Selection

Reset to Default

Set Default Settings

Run Report

RENEWAL REPORT

Printed Date: May 25, 2026

Renewal Date: May 25, 2026 to Dec 14, 2028

Agent: Lender: All Mortgage Type: All Request Type: All Group By: Agent Sort By: Lender Application ID

Agent	Application ID	Mortgage	Applicant Name	Lender	Status	Insured	Rate Type	Rate	Total Loan	Renewal Date
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Derek Matthewson								
Derek Matthewson	QA12-619	Second - Requested	Julia Last	Pending	Capped Variable	5.000%	\$200,000.00	Mar 24, 2028
Derek Matthewson	QA12-774	Second - Requested	Hugey Deal	Pending	Fixed	5.000%	\$20,000.00	Jul 16, 2028
Derek Matthewson	QA12-4093	First - Requested	Johnny King	Pending	Fixed	8.000%	\$400,000.00	Jun 24, 2026
Derek Matthewson	QA12-4095	Second - Requested	refi SmithN	Pending	X Fixed	8.000%	\$150,000.00	Sep 17, 2026
Derek Matthewson	QA12-4096	First - Existing	JohnG SmithG	Pending	Fixed	5.690%	\$529,880.00	Oct 19, 2026
Derek Matthewson	QA12-4098	Second - Existing	refi SmithM	Pending	Fixed	8.000%	\$100,200.00	Sep 17, 2026
Derek Matthewson	QA12-5945	First - Existing	test cobroke	Pending	Adjustable	7.000%	\$700,000.00	Jun 07, 2028
Derek Matthewson	QA12-7556	First - Requested	Franky Boom	Pending	X Fixed	5.500%	\$100,600.00	Apr 21, 2028
Derek Matthewson	QA12-8264	Third - Requested	John Middleton	Cancelled	X Fixed	7.000%	\$1,505,000.00	Nov 01, 2026
Derek Matthewson	QA12-8284	First - Requested	bonnie wheeler	Pending	X Fixed	2.400%	\$522,509.41	Oct 26, 2028

Automation Enhancements

Renewal-based automations can now consider qualifying **existing mortgages** in addition to requested mortgages.

This means renewal reminder workflows and client outreach automations can help surface additional opportunities automatically.

View Automations

View and manage all your automations below.

Board Level

Application Level

Documents

Settings

Renewals

BASED ON MORTGAGE RENEWAL DATES

30 DAYS RENEWAL REMINDER
Automatically send this email 30 days prior to the mortgage renewal date.

90 DAYS RENEWAL REMINDER
Automatically send this email 90 days prior to the mortgage renewal date.

Upcoming Recipients in the next 30 days
Checking a recipient will suppress or un-suppress them for this campaign.

SUPPRESSED	APP ID	NAME	EMAIL	PROPERTY ADDRESS	MORTGAGE	SCHEDULED DATE
☐	4097	Billing Diane	jg@tel.net	4 Bentonwood Crescent, Whitby, Ontario, L1R 1L5	Requested/Current	June 2, 2028
☐	4092	Sally Field	sallyfield@gmail.com	80 Queen Street, Toronto, Ontario, M5C 0B6	Existing	June 9, 2026

Close

View Upcoming Recipients

Optional Visibility Toggle

A new option has been added within **Personal Settings** allowing users to enable or disable existing mortgage visibility within renewal views and automations.

While we believe this enhancement provides significant value, brokers can control how this information appears within their workflow.

Password

Current Password

New Password

Confirm Password

Site URL

Please note: changing this will also change the links to your Application link and Client Portal.
Please ensure to update the links anywhere you have posted them (i.e. email signatures, websites, iframes, etc).

Account Domain

Portal Domain

Client Domain

https://broker-uat.doorr.com/

derekthebroker

https://uat.getmy mortgage/

derekthebroker

Language Preferences

Preferred Language

English

Account Preferences

Show Tutorial

No

Yes

Include Existing Mortgages in Automations, etc.

No

Yes

Key Benefits

With Expanded Renewal Visibility, brokers can now:

- Identify renewal opportunities across more of a client's mortgage portfolio
- Track both requested and existing mortgages more effectively
- Improve proactive client outreach ahead of maturity dates
- Surface additional business opportunities that may have previously been missed



Stay tuned for some more great features throughout 2026!!