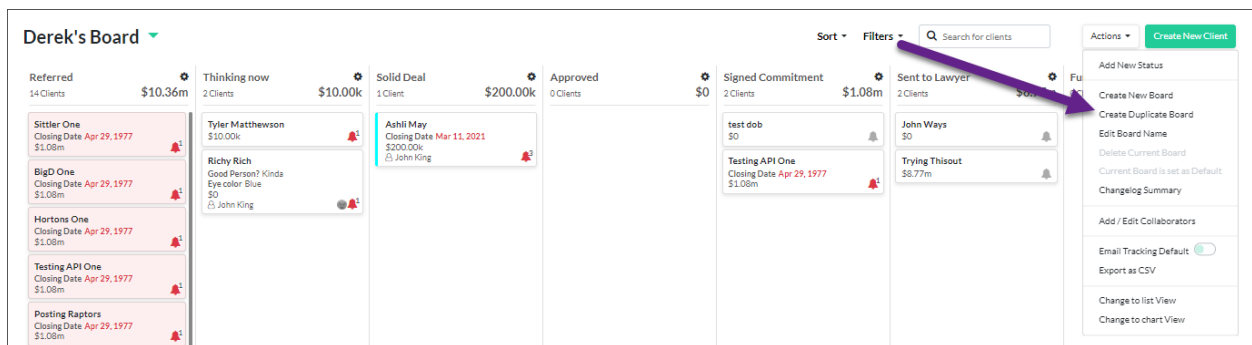Say Goodbye to Board Boredom!

We're excited to introduce some awesome enhancements to the board functionality in Expert Pro! These updates give you more freedom and control over your client boards, making your life easier and more organized.
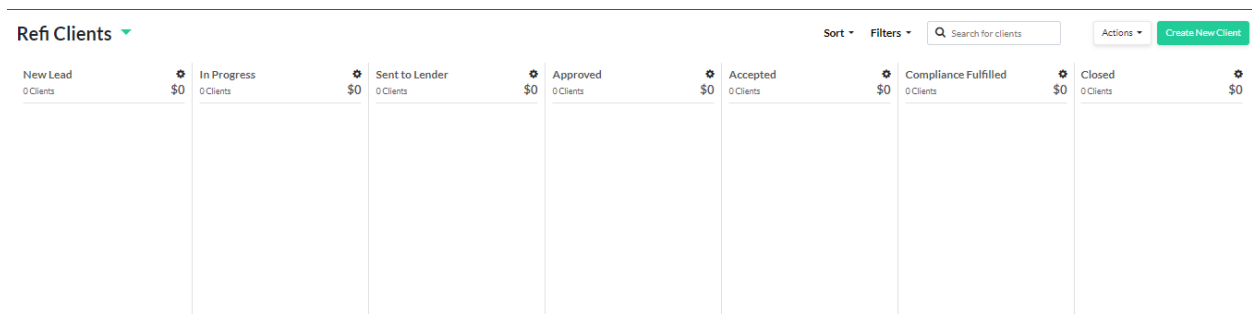
Duplicate Board Creation

You can now create duplicate boards with just a click. It's a time-saving feature that lets you replicate existing boards and maintain consistency across your boards. Don't worry, when you duplicate a board, you still have the freedom to update the statuses after creation; we just wanted to save you a bunch of time for the more important stuff!

Enhanced Default Board Statuses

We've jazzed up the default board statuses based on valuable user feedback and industry insights. With these revamped default board statuses, you'll have a smoother workflow and a clearer understanding of your clients' journeys. Happy mortgage managing!
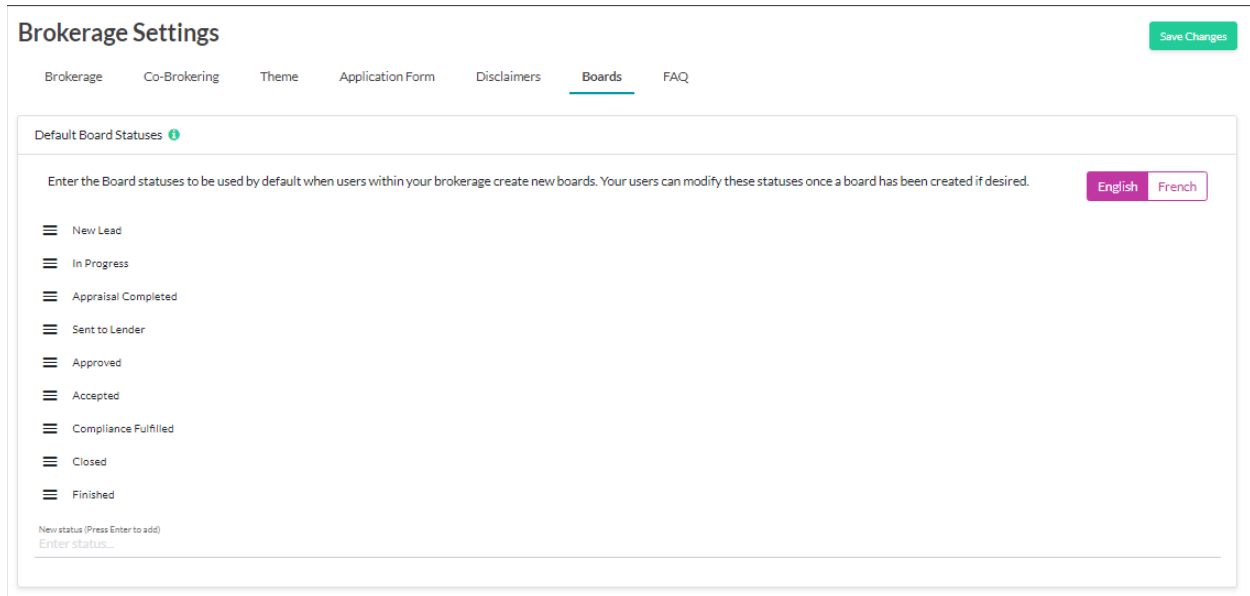

Brokerage Default Boards

If you're a brokerage owner, you'll love this one! Now, brokerage admins have the power to set default boards for all their users in one fell swoop! While users can still customize the board statuses as they please, this feature ensures that everyone starts off on the same page with consistent default statuses

on each new board. It's all about unity, simplicity, and saving time. So go ahead and set the stage for seamless collaboration within your brokerage, knowing that everyone is in sync from the very beginning.

To set up default boards for your users, simply use the Brokerage Settings page, select Boards, then add / remove / reorder statuses as you wish. If your brokerage consists of both English and French users, don't worry - we've got you covered! Simply switch between the English and French tabs to configure the respective default boards., and don't forget to save your changes!!

Document Automations – Switching Things Up!!

We understand that consistency is key when it comes to document automation. That's why we're excited to introduce the same powerful feature for switch/transfer applications as you've come to expect for purchases, refinances, and pre-approvals. Now you can automatically request specific documents when a client sends you a switch/transfer application.

Co-Brokered Applications: Sharing is Caring...and Profiting!

We're excited to announce a valuable enhancement to Expert Pro that brings increased transparency to your mortgage workflow. With our latest update, you will now receive a clear notification when a new application is the result of a co-broker action. Within your listing of applications, you can now easily identify not only which applications were a result of someone co-brokering to you, but the name of the person that sent it to you is also displayed.

From the Department of Redundancy Department…

We're thrilled to announce a refreshing update to Expert Pro that declutters the user interface and enhances your overall experience. In response to valuable user feedback, we have eliminated redundant placeholders that duplicated the field headings throughout the application.

We understand the importance of a clean and intuitive front end, and this enhancement ensures a more streamlined and visually appealing interface.

Previous Look:

Updated Look:

New Brunswick's Mortgage Broker Discloser to Borrower Form is Now Available on Expert Pro!

To access the Mortgage Broker Disclosure to Borrower document, simply navigate to the forms section for any New Brunswick deal within Expert Pro. From there, you'll be able to generate and customize this document specific to your client's needs. We hope this new addition simplifies your mortgage processes and strengthens your compliance efforts in New Brunswick.

We've also managed to squash a few bugs!!

- Formatting improvements in the New Brunswick's Initial Borrower Disclosure form
- Automation emails now reflect any updates to your address/signature after scheduling
- Mortgage Amount in your client applications list now includes mortgage insurance (if applicable)
- Emails notifying you that a document has been uploaded now reflects individual applicant's name that uploaded the file
- Ontario Lender Disclosure form captures appraised value
- BC Fixed Credit Disclosure Statement – enhanced data population
- Increased accuracy on applications listing default sort
- French translation updates