Expert Pro Release Notes: April 2025 Update

We're excited to roll out some great new features and improvements in this release. From updated FSRA forms to smarter document handling and more flexibility in managing your files, here's what's new in Expert Pro.

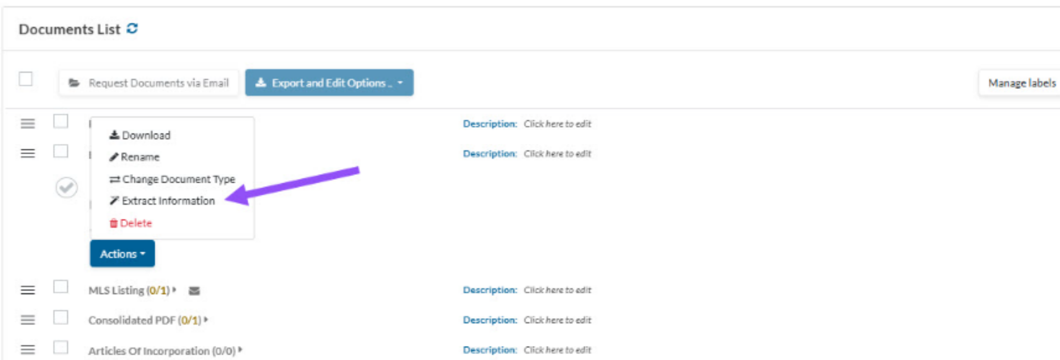
FSRA Forms – Final Updates Are In!

The last round of updates for the Ontario FSRA forms is now live. This includes the revised French version of Form 1, as well as the brand-new English and French templates for Form 2 – Renewal Form. You'll also notice some freshened-up edit screens to match. Everything is now fully aligned with the latest FSRA standards.

Document Extraction – Work Faster, Not Harder

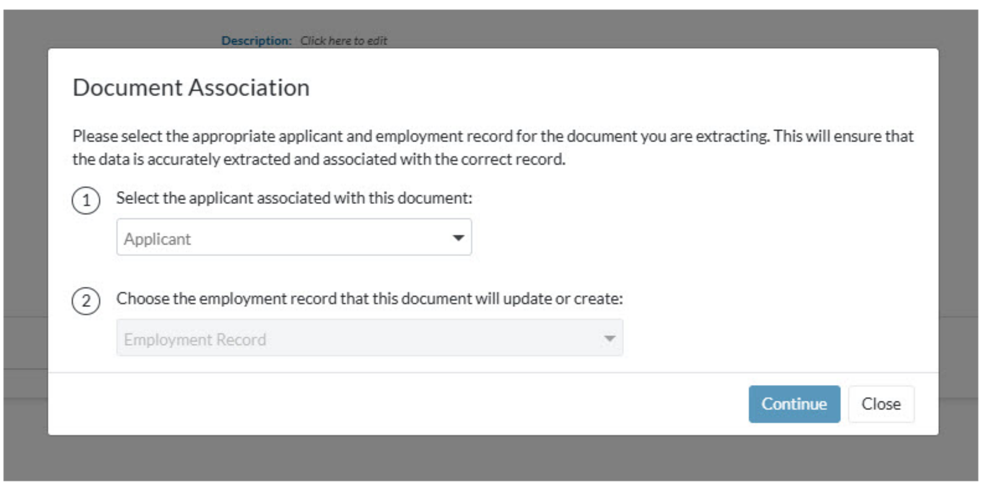
We've made it easier than ever to pull information from documents and apply it to your mortgage applications. You can now extract data from T4s, paystubs, salary letters, and MLS listings with just a few clicks.
Here's how it works for employment confirmation documents:

- Upload a document (T4, paystub, or salary letter)
- Click the Actions dropdown and select 'Extract Information'

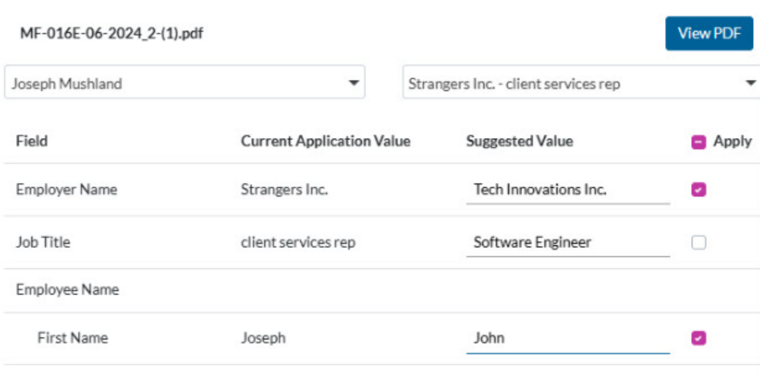


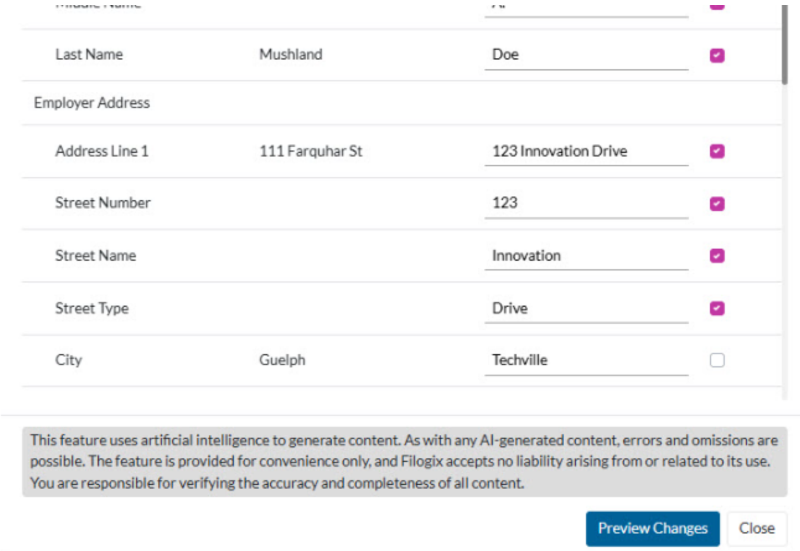
- Choose whether to:

  o Link it to an existing income record, or
  o Create a brand-new record



- View a side-by-side comparison of what's on the document vs. what's in the application



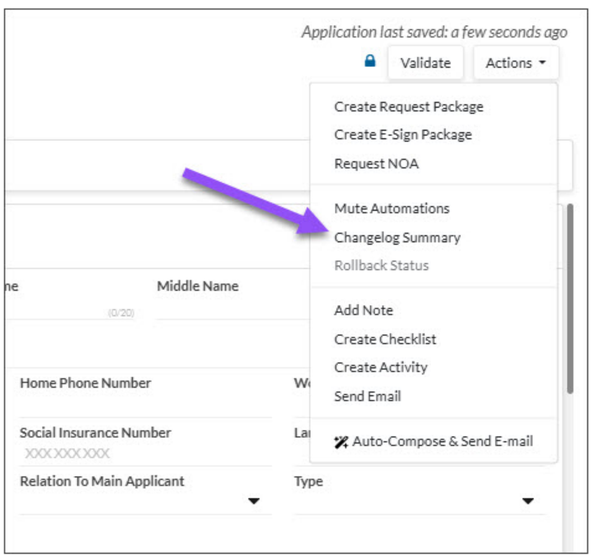


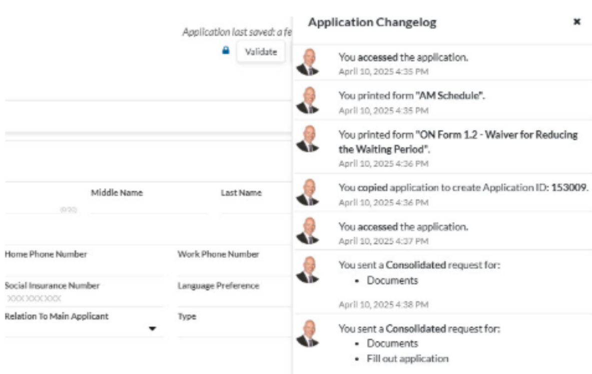
- Click Apply to overwrite all fields, or select specific items to update
- Use the 'View PDF' option to reference the document before applying changes
- Once you're happy with the preview, hit 'Apply Changes' to finalize

MLS listings follow a similar process, but since there's only one subject property per application, there's no need to pick a matching record—it's done automatically.

View Application History (Changelog Summary)

- Curious about an application's journey? The new 'Changelog Summary' (found under the Actions dropdown) lets you see a detailed timeline of actions taken—user access, status changes, document updates, and more.





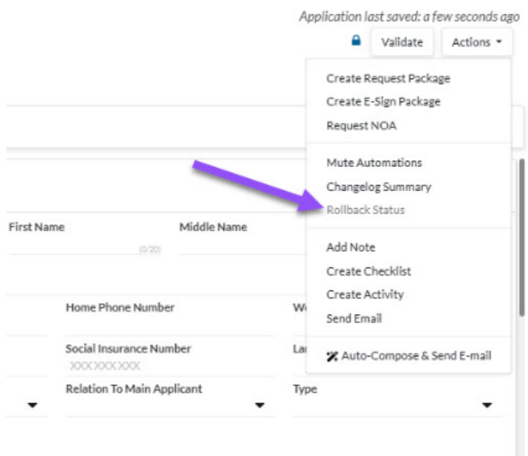
- The changelog will only capture events performed after this release
- Keep track of events:

  - Creation of the application
  - Accessing the application
  - Application copy
  - Sending client request packages
  - Documents added/deleted/completed
  - Status changes
  - Printing of forms
  - Co-Brokering

- Additional change event types will be added in a future release

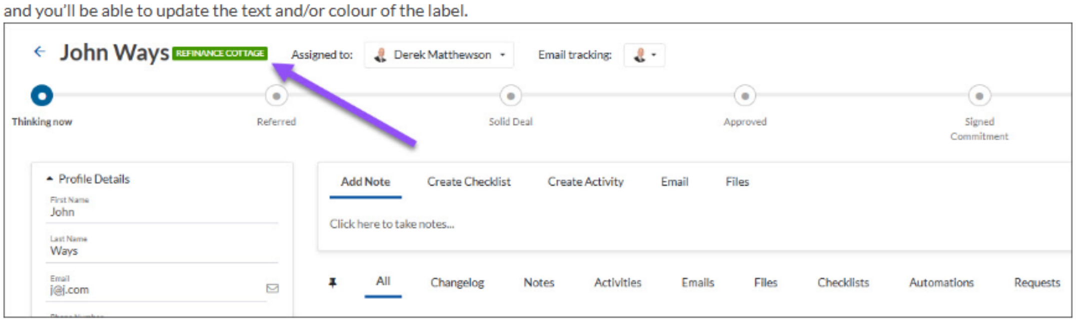
Update Status of Completed Applications

- You can now update the status of applications after they've been marked as Completed, providing greater control over your workflow.



Updating Client Profile Labels After Creation

When you create a new client profile based on an existing client, you have the ability to add a label in order to distinguish one of the client's profile from the other. The issue was that there was no way to update that label after creating it. Now you can simply click on the existing label and you'll be able to update the text and/or colour of the label.



New Business Rule – Primary Borrower's Email

- We've added a warning to let you know when the primary borrower's email is left blank.

Fixes

- Corrected a scenario that resulted in negative values in the Amortization Schedule
- Issue when certain multiple forms were printed at once
- Language issue when generating auto email summaries
- Linking applications from the Client Profiles experienced an issue when searching
- Issue with tool tip on Client Portal – Business Address
- Active area around select checkboxes was too large
- Specific subscriber numbers causing issues when requesting AML report
- Firm Statistics Report – Cleaned up some French text
- Commissions Record PDF – Date formatting
- Clarified text for confirmation message when an email is deleted