

Introducing DocConnect

Filogix is excited to announce the launch of DocConnect, a new feature in Expert Broker that enables secure, streamlined document sharing with participating lenders. This enhancement helps simplify your workflow, reduce follow-ups, and ensure sensitive documents are transmitted safely.

DocConnect is available to Expert Broker users with an active Filogix Exchange account. For access to or activation of Filogix Exchange, please reach out to expert.support@finastra.com.

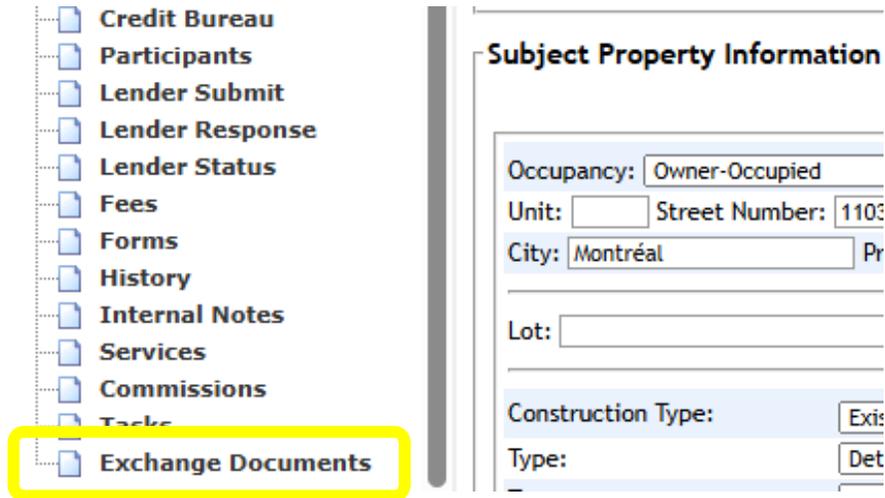
Secure Document Submission to Lenders

With DocConnect, you can submit supporting documents directly to lenders who have enabled the feature— starting with Desjardins, with more lenders to follow as they adopt the capability.

Submitting Documents After Application Submission

Once you submit your Expert Broker deal to at least one participating DocConnect lender:

- Open the Exchange folder for the deal.



The image shows a screenshot of the Expert Broker interface. On the left is a sidebar menu with various folders, and on the right is a form titled "Subject Property Information".

Exchange Documents (highlighted in yellow in the original image):

- Credit Bureau
- Participants
- Lender Submit
- Lender Response
- Lender Status
- Fees
- Forms
- History
- Internal Notes
- Services
- Commissions
- Tasks
- Exchange Documents**

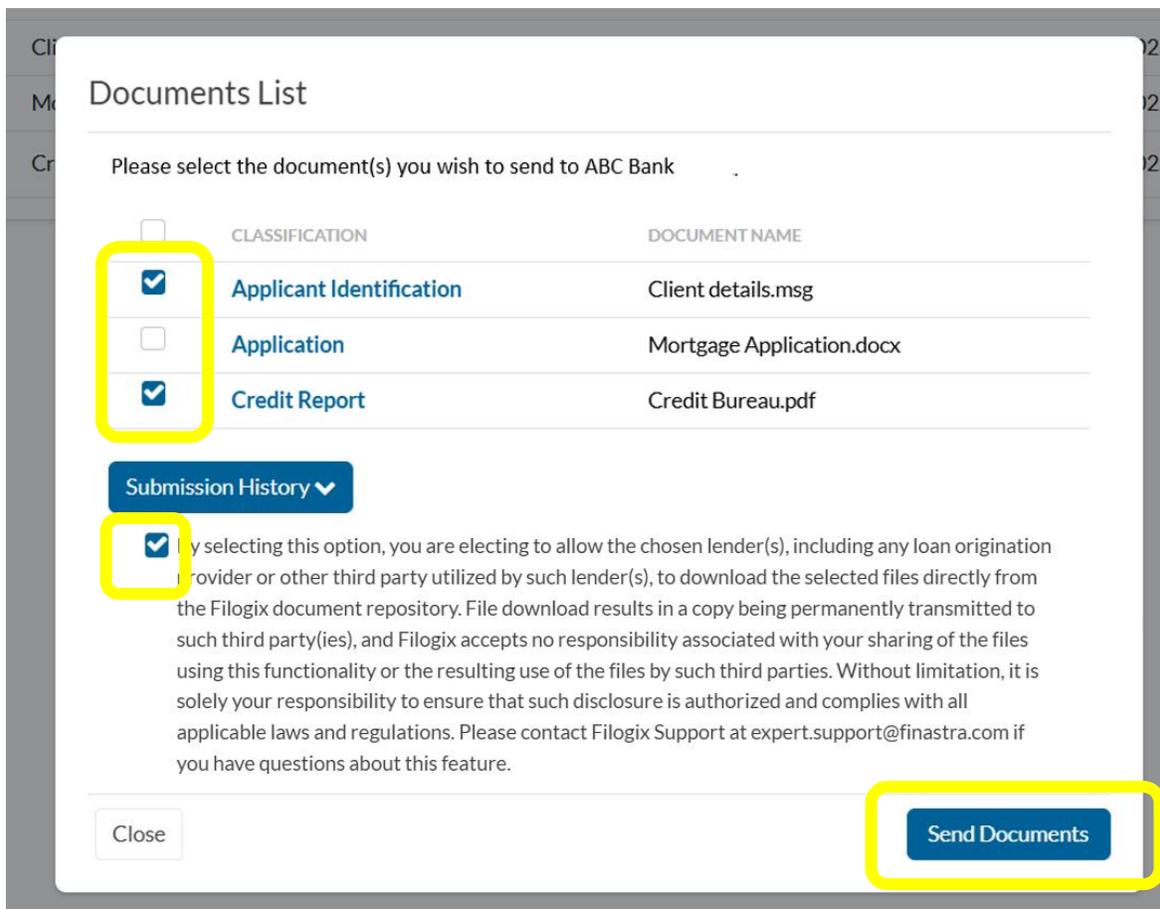
Subject Property Information form fields:

- Occupancy:
- Unit: Street Number:
- City:
- Lot:
- Construction Type:
- Type:

- Once you have uploaded documents in Exchange you will see a “Send Documents to Lender” dropdown.
- The dropdown will contain the list of all enabled lenders who the deal has been submitted to. Select a lender, and a modal will appear listing eligible documents.



- Using the checkboxes, select the documents you want to share, review and check off the disclaimer, then click “Send Documents” to securely transmit them.



- Once sent, the submission history will display details of the documents that were submitted.

The screenshot shows a 'Documents List' modal window. At the top, it says 'Please select the document(s) you wish to send to ABC Bank'. Below this is a table with two columns: 'CLASSIFICATION' and 'DOCUMENT NAME'. There is one row with a checkbox, the classification 'Application', and the document name 'Mortgage Application.docx'. Below the table is a blue button labeled 'Submission History ^'. Underneath is another table with three columns: 'CLASSIFICATION', 'DOCUMENT NAME', and 'SUBMISSION DATE'. Two rows are visible in this table, both highlighted with a yellow border: 'Applicant Identification' with document 'Client details.msg' and submission date 'June 18, 2025 15:33'; and 'Credit Report' with document 'Credit Bureau.pdf' and submission date 'June 18, 2025 15:33'. Below the second table is a checkbox and a paragraph of text explaining the consent for document sharing. At the bottom left is a 'Close' button and at the bottom right is a 'Send Documents' button.

CLASSIFICATION	DOCUMENT NAME
<input type="checkbox"/>	Application
	Mortgage Application.docx

Submission History ^

CLASSIFICATION	DOCUMENT NAME	SUBMISSION DATE
Applicant Identification	Client details.msg	June 18, 2025 15:33
Credit Report	Credit Bureau.pdf	June 18, 2025 15:33

By selecting this option, you are electing to allow the chosen lender(s), including any loan origination provider or other third party utilized by such lender(s), to download the selected files directly from the Filogix document repository. File download results in a copy being permanently transmitted to such third party(ies), and Filogix accepts no responsibility associated with your sharing of the files using this functionality or the resulting use of the files by such third parties.

Close Send Documents

- To help prevent duplicate submissions, documents that have already been sent are automatically removed from the list of available documents in the modal. You can view all past submissions to the lender at any time by expanding the 'Submission History' section.

Submit Documents at any stage of the deal

As new documents become available throughout the lifecycle of the deal, simply upload them to Exchange. They will automatically appear in the submission modal, ready to be sent to the lender.

Documents List

Please select the document(s) you wish to send to ABC Bank

<input checked="" type="checkbox"/>	CLASSIFICATION	DOCUMENT NAME
<input checked="" type="checkbox"/>	Application	Mortgage Application.docx
<input checked="" type="checkbox"/>	Void Cheque	Void Cheque.jpg

Submission History ▾

By selecting this option, you are electing to allow the chosen lender(s), including any loan origination provider or other third party utilized by such lender(s), to download the selected files directly from the Filogix document repository. File download results in a copy being permanently transmitted to such third party(ies), and Filogix accepts no responsibility associated with your sharing of the files using this functionality or the resulting use of the files by such third parties. Without limitation, it is solely your responsibility to ensure that such disclosure is authorized and complies with all applicable laws and regulations. Please contact Filogix Support at expert.support@finastra.com if you have questions about this feature.