New Feature:

DocConnect – Secure Document Submission to Lenders

We're excited to introduce DocConnect, a new feature in Expert Pro that allows brokers to securely send documents directly to participating lenders.

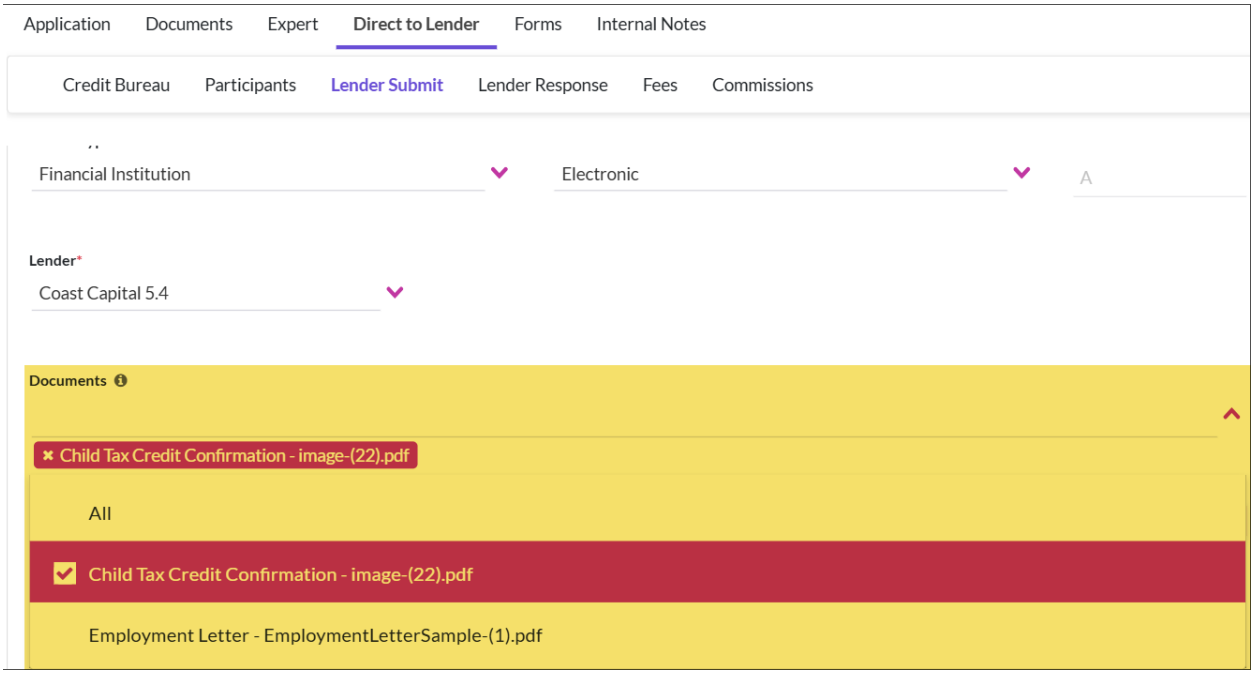
🔐 What is DocConnect?

DocConnect enables you to submit supporting documents to lenders that have this feature enabled — starting with Desjardins, with more lenders to follow as they adopt the capability.

📩 Submitting Documents During Application Submission

When submitting a deal to a DocConnect-enabled lender:

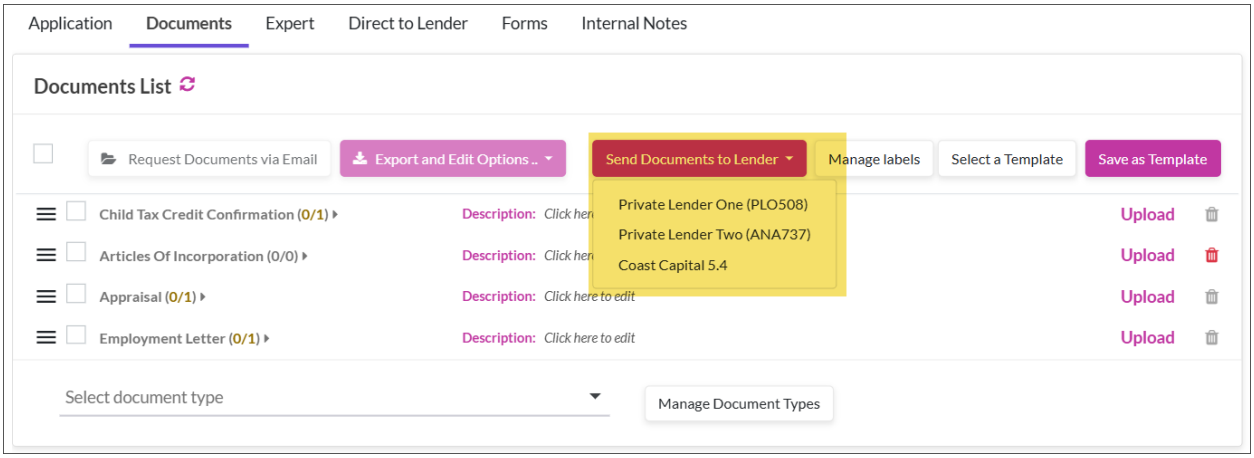
- A Documents dropdown will appear.
- You'll see a list of documents already uploaded to the deal in Expert Pro.
- Simply select the documents you wish to include with the submission.

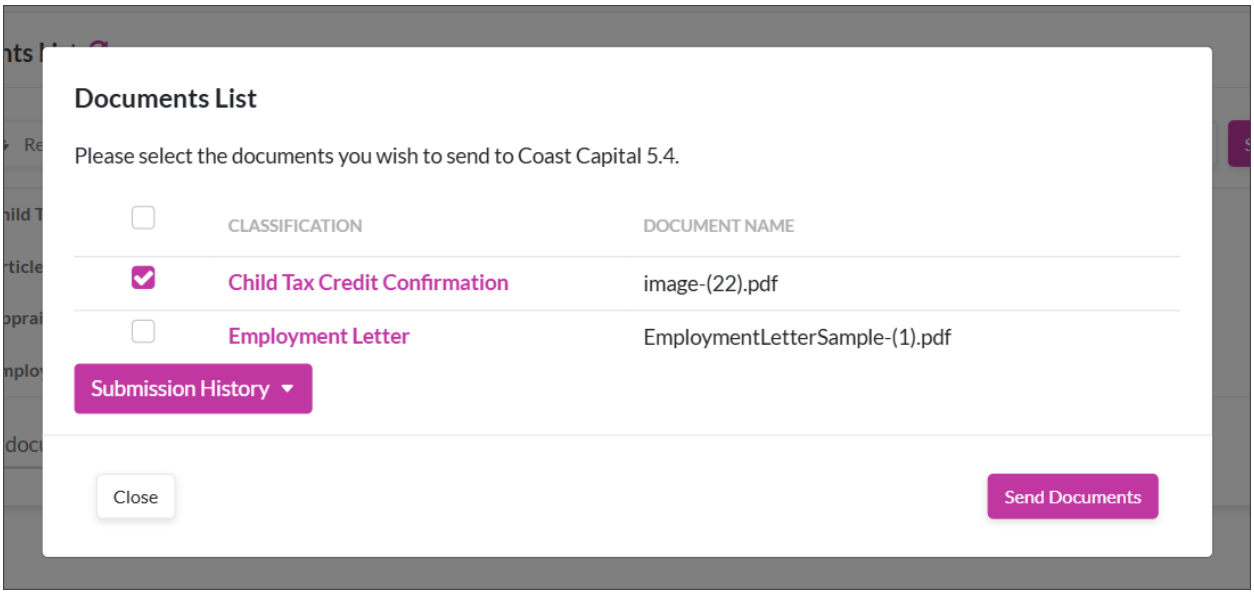


📁 Submitting Documents After Application Submission

If you need to send documents after an application has been submitted:

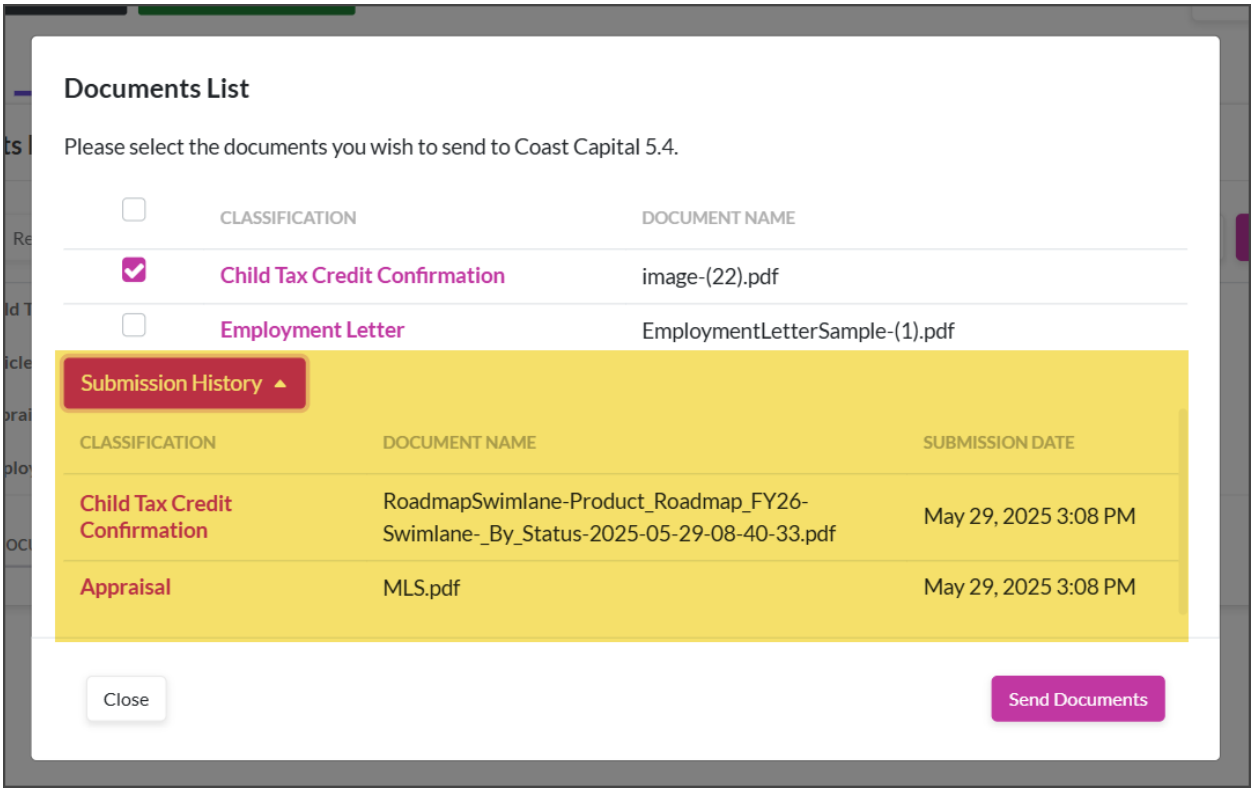
- Go to the Documents page in the deal.
- If the deal has been submitted to at least one DocConnect-enabled lender, you'll see a "Send Documents to Lender" dropdown.
- Select the lender, and a modal will appear listing eligible documents.
- Choose the documents you want to send, then click Send Documents to securely transmit them.





View Submission History

You can also view previously shared documents with each lender by selecting the Submission History option in the modal.



DocConnect makes it easier and more secure to manage document sharing with lenders, helping streamline your workflow and reduce follow-ups.