

## 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.

Application	Documents	Expert	Direct to Lender	Forms	Internal Notes
Credit Bureau	Participants	Lender Submit	Lender Response	Fees	Commissions

..

Financial Institution

Electronic

A

Lender\*

Coast Capital 5.4

Documents ⓘ

✕ Child Tax Credit Confirmation - image-(22).pdf

All

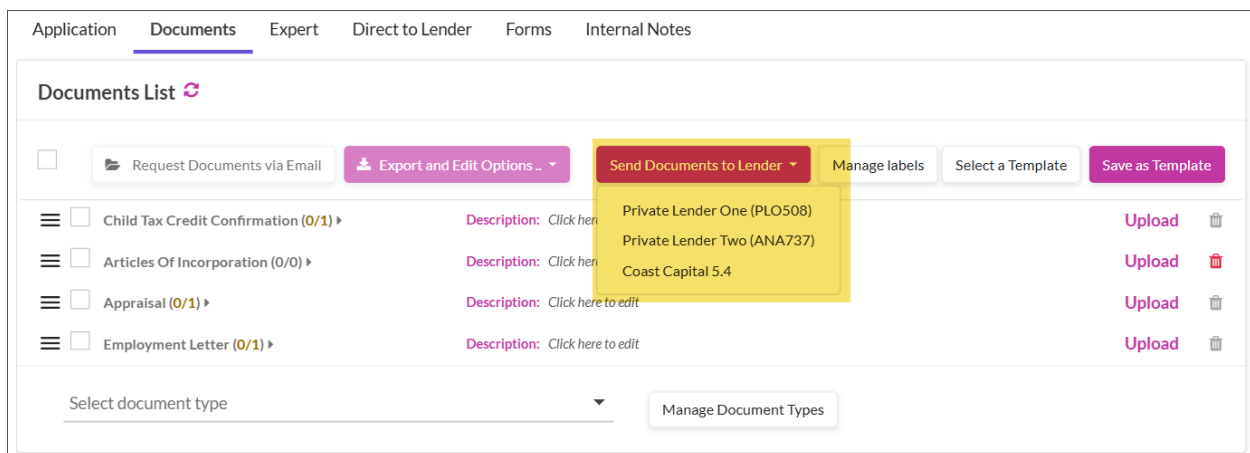
☒ Child Tax Credit Confirmation - image-(22).pdf

Employment Letter - EmploymentLetterSample-(1).pdf

## Submitting Documents After Application Submission

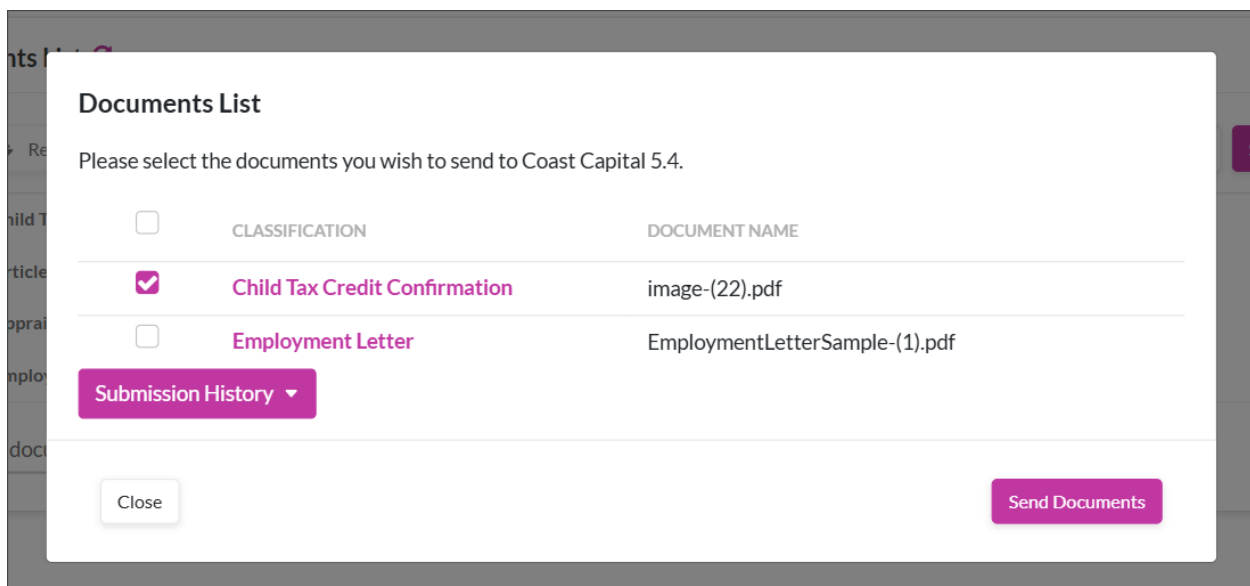
If you need to send documents after an application has been submitted:

- 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.



The screenshot shows the 'Documents List' page with a navigation bar at the top containing 'Application', 'Documents' (active), 'Expert', 'Direct to Lender', 'Forms', and 'Internal Notes'. Below the navigation bar, there's a 'Documents List' header with a refresh icon. A toolbar contains buttons: 'Request Documents via Email', 'Export and Edit Options ...', 'Send Documents to Lender' (highlighted with a yellow box), 'Manage labels', 'Select a Template', and 'Save as Template'. The main area displays a list of documents with checkboxes, classification names, descriptions, and 'Upload' buttons. A yellow box highlights the 'Send Documents to Lender' button and the dropdown menu showing 'Private Lender One (PLO508)', 'Private Lender Two (ANA737)', and 'Coast Capital 5.4'. At the bottom, there's a 'Select document type' dropdown and a 'Manage Document Types' button.

Classification	Description	Upload
<input type="checkbox"/> Child Tax Credit Confirmation (0/1) ▶	Description: <a href="#">Click here to edit</a>	Upload
<input type="checkbox"/> Articles Of Incorporation (0/0) ▶	Description: <a href="#">Click here to edit</a>	Upload
<input type="checkbox"/> Appraisal (0/1) ▶	Description: <a href="#">Click here to edit</a>	Upload
<input type="checkbox"/> Employment Letter (0/1) ▶	Description: <a href="#">Click here to edit</a>	Upload



The screenshot shows a modal titled 'Documents List' with the instruction 'Please select the documents you wish to send to Coast Capital 5.4.' The modal contains a table with checkboxes, classification names, and document names. The 'Child Tax Credit Confirmation' document is selected with a checkmark. Below the table is a 'Submission History' dropdown button. At the bottom of the modal are 'Close' and 'Send Documents' buttons.

CLASSIFICATION	DOCUMENT NAME
<input checked="" type="checkbox"/> Child Tax Credit Confirmation	image-(22).pdf
<input type="checkbox"/> Employment Letter	EmploymentLetterSample-(1).pdf

## View Submission History

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

Documents List

Please select the documents you wish to send to Coast Capital 5.4.

☐

CLASSIFICATION

DOCUMENT NAME

☒

Child Tax Credit Confirmation

image-(22).pdf

☐

Employment Letter

EmploymentLetterSample-(1).pdf

Submission History ▲

CLASSIFICATION

DOCUMENT NAME

SUBMISSION DATE

Child Tax Credit Confirmation

RoadmapSwimlane-Product\_Roadmap\_FY26-Swimlane-\_By\_Status-2025-05-29-08-40-33.pdf

May 29, 2025 3:08 PM

Appraisal

MLS.pdf

May 29, 2025 3:08 PM

Close

Send Documents

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

