

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.

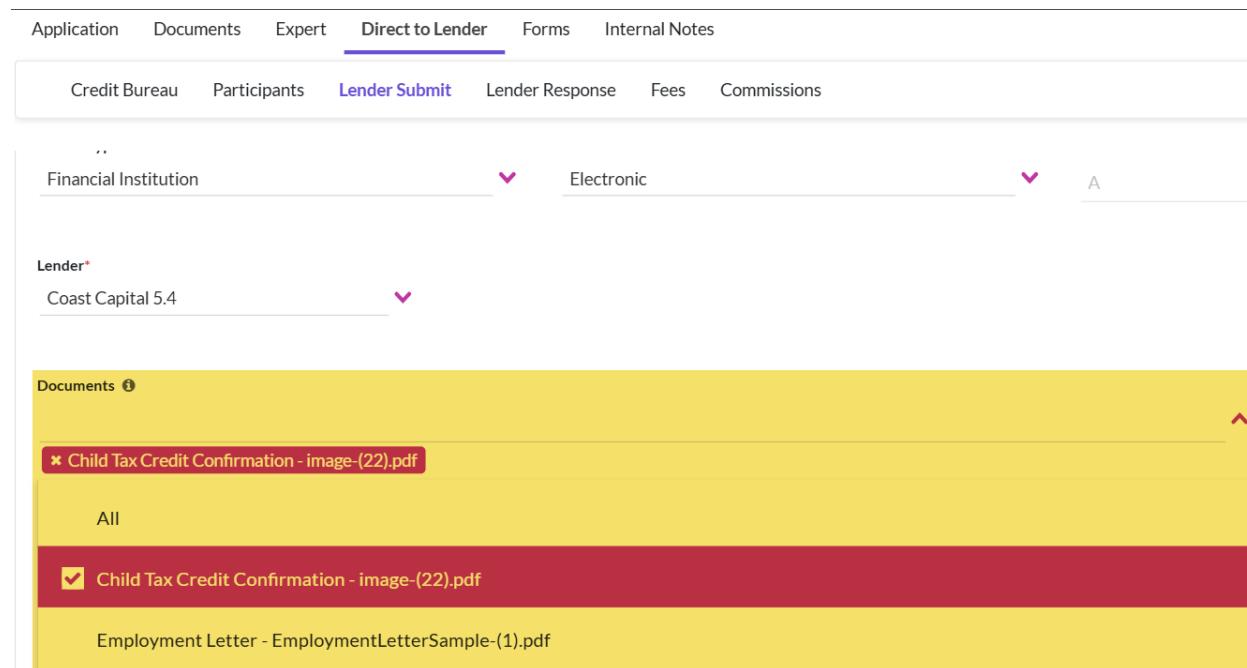
What is DocConnect?

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.



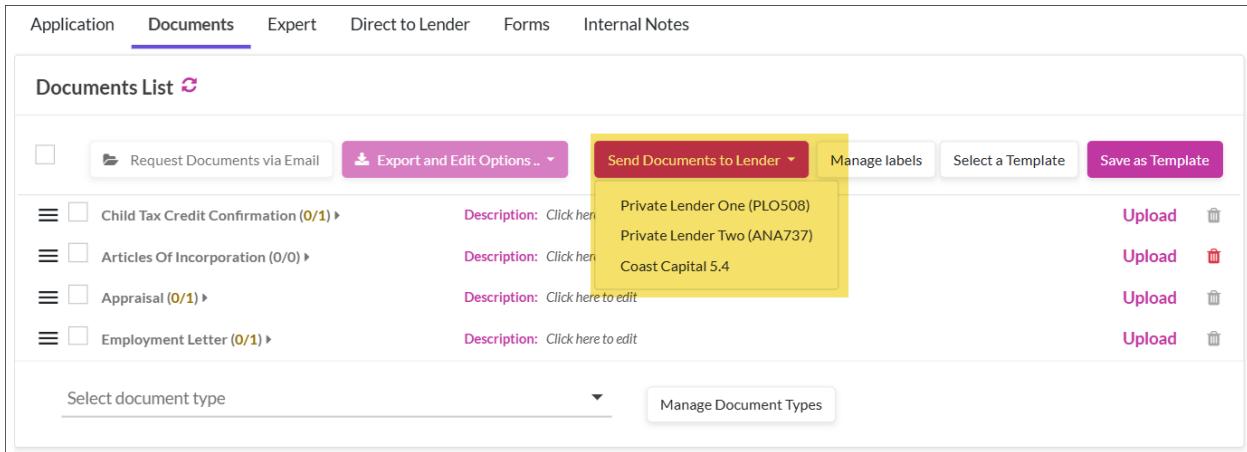
The screenshot shows the Expert Pro application interface with the 'Direct to Lender' tab selected. The 'Documents' section is highlighted in yellow, displaying a list of uploaded files. The 'Child Tax Credit Confirmation' file is checked, while the 'Employment Letter' file is not. The interface includes tabs for Application, Documents, Expert, Direct to Lender, Forms, and Internal Notes, and sub-tabs for Credit Bureau, Participants, Lender Submit, Lender Response, Fees, and Commissions.

File	Status
Child Tax Credit Confirmation - image-(22).pdf	Selected
Employment Letter - EmploymentLetterSample-(1).pdf	Not Selected

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.



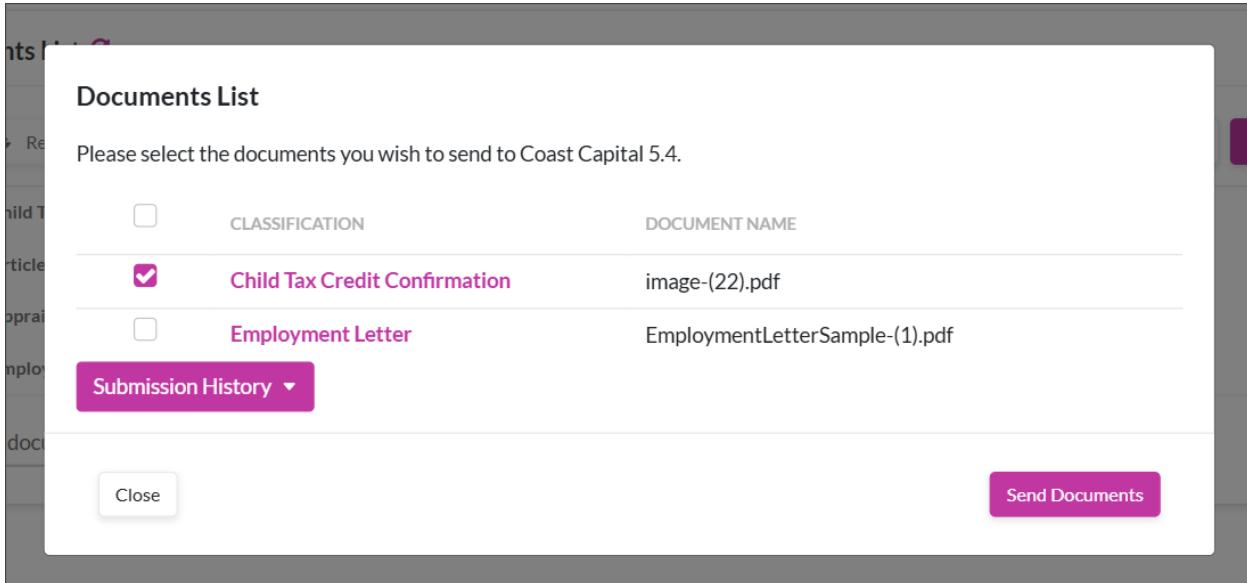
Application Documents Expert Direct to Lender Forms Internal Notes

Documents List

Request Documents via Email

Document	Description	Actions
Child Tax Credit Confirmation (0/1) ▾	Description: Click here to edit	<input type="button" value="Upload"/> <input type="button" value="Delete"/>
Articles Of Incorporation (0/0) ▾	Description: Click here to edit	<input type="button" value="Upload"/> <input type="button" value="Delete"/>
Appraisal (0/1) ▾	Description: Click here to edit	<input type="button" value="Upload"/> <input type="button" value="Delete"/>
Employment Letter (0/1) ▾	Description: Click here to edit	<input type="button" value="Upload"/> <input type="button" value="Delete"/>

Select document type



Documents List

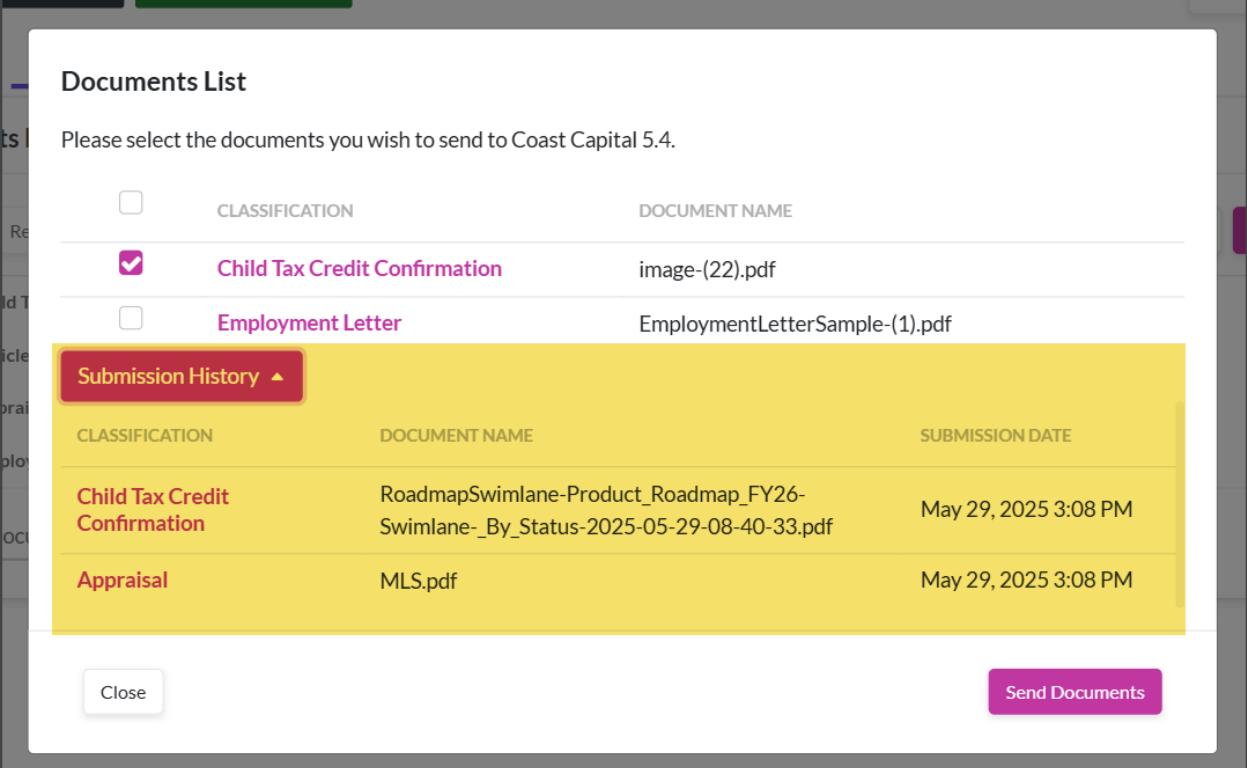
Please select the documents you wish to send to Coast Capital 5.4.

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

Submission History ▾

View Submission History

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



The screenshot shows a modal window titled "Documents List". It contains a list of documents with checkboxes for "CLASSIFICATION" and "DOCUMENT NAME". The first document, "Child Tax Credit Confirmation", is checked. The second document, "Employment Letter", is not checked. Below this is a section titled "Submission History" with a yellow background, containing a table with columns "CLASSIFICATION", "DOCUMENT NAME", and "SUBMISSION DATE". It lists two submissions: "Child Tax Credit Confirmation" on May 29, 2025, and "Appraisal" on May 29, 2025. At the bottom are "Close" and "Send Documents" buttons.

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

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

