

Introducing Smart Entry: Speak, paste, or type your way to an application

SEE SMART ENTRY IN ACTION!!

Sometimes you need to start an application for your client yourself. With **Smart Entry**, you can share the details in your own words and let Expert Pro help put them in the right places—without entering the application field by field.

From **Applications** → **Add Application** → **Begin an Application**, choose **Smart Entry**. Speak directly into the microphone and watch your words appear as text. Or paste details from a client email, or simply type what you know.

Add Application

☒ Manual Entry ☒ Smart Entry

Begin an application

Use this option to start an application on your client's behalf. Using this option will create an account for your client.

First Name*

Last Name*

Phone Number

Email

Mortgage Type

☐ Purchase

☐ Refinance

☐ Pre-Approval

☐ Switch / Transfer

Application Language English

Select **Analyze Information**, and Expert Pro will identify the information you've provided and match it to application fields, such as applicant information, assets, liabilities, and property details. You'll see the suggested fields **before an application is created**, so you can review them, make updates, and choose which details to include. When you're ready, create the application in a few clicks.

When analyzing a larger amount of information, you may occasionally see a timeout message. Your text will remain in place, simply select **Analyze Information** again to retry.

Add Application

☒ Manual Entry ☒ Smart Entry

Let us help you get started

Share what you know about your client using text or your voice. Expert Pro will extract the details and create a draft application for you to review.

Tell us about your client

Paste notes, copy an email, or use voice input. Expert Pro will identify client and mortgage details and prepare a draft application for review.

I have a new client named Michael Thompson. Michael is married and currently lives at 42 Brookfield Crescent in Whitby, Ontario. He has lived there for about six years.

Michael is looking to purchase a new owner-occupied property at 1874 Lakeview Drive in Oshawa, Ontario. The purchase price is \$850,000 and he is planning to put \$170,000 down. He is looking for a mortgage of approximately \$680,000. The closing date is November 27, 2026. He would prefer a five-year fixed mortgage with a 25-year amortization.

Michael was born on May 14, 1984. His phone number is 905-555-0184 and his email address is michael.thompson@example.com.

Your information is processed securely and not stored for training. 3041 / 8000

Add Application

☒ Manual Entry ☒ Smart Entry

Draft application created!

We've created a draft application with the details you approved. You can

review and complete any remaining information.

MT

Michael Thompson
Purchase • \$850,000 • Oshawa, Ontario

View Application ↗

Smart Entry Summary

Information Extracted

112

Fields Populated

112

Close

Speak it. Paste it. Type it. Smart Entry helps turn your client's story into an application, with you in control of every detail.