

Keep Everyone in the Loop with Enhanced Notifications

It's now easier to keep your team and other key contacts up to date as an application moves forward. With Enhanced Notifications, you can send Expert Pro notifications by email, SMS text message, or both and add recipients from within or outside your brokerage.

Choose who should receive updates about supported activities, such as documents uploaded through Client Portal. The right people can stay informed automatically, giving you fewer updates to send yourself.

To get started, go to **Personal Settings > Notifications**. You can add, edit, or remove recipients and change how they receive notifications whenever you need to. External recipients receive a subscription confirmation if SMS is selected and they'll need to accept the text invitation before SMS notifications can begin.

Personal Settings

Account

Notifications

Theme

Application Form

Disclaimers

FAQ

Save Changes

Documents notifications	☒ All	☒ All	☒ All	Recipients
NEW DOCUMENT UPLOAD Notify me whenever a new document has been uploaded.	☒ Email	☒ Web	☒ Text	
NEW COMMENT Notify me whenever a new comment is added to a document.	☒ Email	☒ Web	☒ Text	
BANK STATEMENT REQUEST Notify me whenever a user submits their bank statements request.	☒ Email	☒ Web	☒ Text	
Client Profile and Boards notifications	☐ All	☒ All	☐ All	Recipients
CLIENT PROFILE & COMMISSION CHANGE Notify me whenever I have been assigned or unassigned as an owner to a client profile.	☒ Email	☒ Web	☒ Text	
BOARD COLLABORATION REQUESTS Notify me whenever I have been added or removed as a collaborator to a board, as well as when an agent has removed themselves from a board that I created.	☐ Email	☒ Web	☒ Text	
CLIENT PROFILE & ACTIVITY REMINDER Notify me whenever an activity is due.	☒ Email	☒ Web	☐ Text	
CLIENT PROFILE & ACTIVITY ASSIGNMENT Notify me whenever I have been assigned to a client profile activity.	☐ Email	☒ Web	☒ Text	
Application notifications	☒ All	☒ All	☐ All	Recipients
CLIENT REGISTRATION Notify me whenever a client signs up using the client application email or the application link.	☒ Email	☒ Web	☐ Text	
APPLICATION SUBMITTED Notify me whenever an application is submitted using any application method, including external ones (e.g. social media, websites, etc.)	☒ Email	☒ Web	☐ Text	
EXPIRED APPLICATION REMINDER Notify me whenever an application during data has passed but the application is not started or completed.	☒ Email	☒ Web	☐ Text	



Stay tuned for some more great features throughout 2026!!