

BROKERAGE MORTGAGE USER GUIDE

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Registration / Sign-Up

Before proceeding, familiarize yourself with the sign-up process outlined below. The following instructions will guide you through each step, ensuring a seamless registration experience. Take a moment to review the screenshot of our sign-up page provided below, and follow the detailed instructions to create your account successfully.

SIGNUP TO YOUR ACCOUNT


1.	Choose User Type	1. Mortgage Broker 2. Mortgage Brokerage 3. Appraiser 4. Appraiser Company
2.	Email Address	Enter your valid email address. The email ID will also be used as user ID.
3.	Create a Secure Password	Choose a password that meets the following criteria: <ul style="list-style-type: none"> • Must be 8-15 characters long • Include at least one uppercase letter (A-Z) • Include at least one lowercase letter (a-z) • Include at least one numeric character (0-9) • Include at least one special character (!@#%\$^&)
4.	Re-enter Password	Confirm your password by entering it again in the designated field
5.	Enter Captcha	Complete the captcha to verify that you are a real user.
6.	Accept Terms and Privacy Policy	Tick the checkbox indicating that you have read and accepted our terms and privacy policy. To review these documents, click on the "Terms and Privacy Policy" link, highlighted in blue.
7.	Sign Up	Once all the required information is provided and the terms are accepted, click the "Sign Up" button to complete the registration process.


How to Log-in?



Go to log-in option on the website

1. Open your web browser on the homepage, locate the "Login" button.
2. Enter your username (Registered Email address) and password.
3. Click the "Login" button.

Login to your account

Email address 

Password 

 Enter Captcha 

☐ Remember me [Forgot password?](#)

Log In

Dont have an account? [Sign Up !](#)


LOGIN TO YOUR ACCOUNT

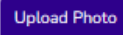
1.	Email address	Provide your registered email for account identification.
2.	Password	Input the secure code chosen during account creation.
3.	Captcha	Enter the characters displayed to verify you are not a robot.
4.	Remember Me	Optionally select to save your login credentials for future sessions.
5.	Login	Click to access your account securely.

How to update profile?

After logging in, updating your personal information is a straightforward process. Follow the steps below to ensure your details are accurate and up to date:

1. Navigate to the login section on the website.
2. After successful login the user will be navigate to the user dashboard.
3. The other way to navigate the dashboard: Home page → Dashboard → Insight option.
4. On successful login for the first time the user will have to complete his profile.
5. Input the necessary information as prompted.





Mortgage Brokerage Information

Brokerage Name *

Principal Broker / Owner - First Name *

Principal Broker / Owner - Last Name *

Mortgage Brokerage Licence No. *

Mortgage Broker Licence No.*

Phone Number (Primary) *

Cell Number

Email Address *

mort@gmail.com

PERSONAL INFORMATION

1.	Uploaded Image	Optional	Placeholder for a profile image or identification document.
2.	First Name	Mandatory	Your given or legal first name.
3.	Middle Name	Optional	Additional name between the first and last name (optional).
4.	Last Name	Mandatory	Your given or legal last name.
5.	Company Name	Mandatory	The name of your affiliated company (if applicable).
6.	Phone Number (Primary)	Mandatory	Your main contact number for communication.
7.	Cell Number	Optional	An additional mobile or cell phone number (optional).
8.	Email Address	Mandatory	Your primary email for communication and account-related information.
9.	Mortgage Brokerage Licence No.	Mandatory	License number for the associated Mortgage Brokerage (if applicable).
10.	Mortgage Broker Licence No.	Mandatory	Your personal Mortgage Broker license number (if applicable).

Alerts

☒ Email Alerts

☒ SMS Alerts

Following this, kindly furnish the complete address.

Address

Street Number *

Street Name *

Unit / Apt. No.

City *

Province *

Postal-Code *

ADDRESS:

1.	Street Number	Mandatory	Numeric identifier for the street in your address.
2.	Street Name	Mandatory	The name of the street in your address.
3.	Unit / Apt. No.	Optional	Specific unit or apartment number (if applicable).
4.	City	Mandatory	The city in which your address is located.
5.	Province	Mandatory	The province or state in which your address is situated.
6.	Postal Code	Mandatory	Unique alphanumeric code identifying your postal area.

Now, please input the details for the Assistant.

An **assistant** is a dedicated individual hired to offer support in administrative tasks, such as managing paperwork, scheduling appointments, handling communication, and aiding in day-to-day operations within a business.

Assistant#1 Information

Assistant First Name

Assistant Last Name

Assistant Phone Number

Assistant Email Address

Assistant#2 Information

Assistant First Name

Assistant Last Name

Assistant Phone Number

Assistant Email Address

Cancel

Update Profile

Assistant #1 Information

Assistant First Name	Provide the first name of the assistant.
Assistant Last Name	Enter the last name of the assistant.
Assistant Phone Number	Specify the phone number of the assistant.
Assistant Email Address	Provide the email address of the assistant.

Assistant #2 Information

Assistant First Name	Provide the first name of the assistant.
Assistant Last Name	Enter the last name of the assistant.
Assistant Phone Number	Specify the phone number of the assistant.
Assistant Email Address	Provide the email address of the assistant.

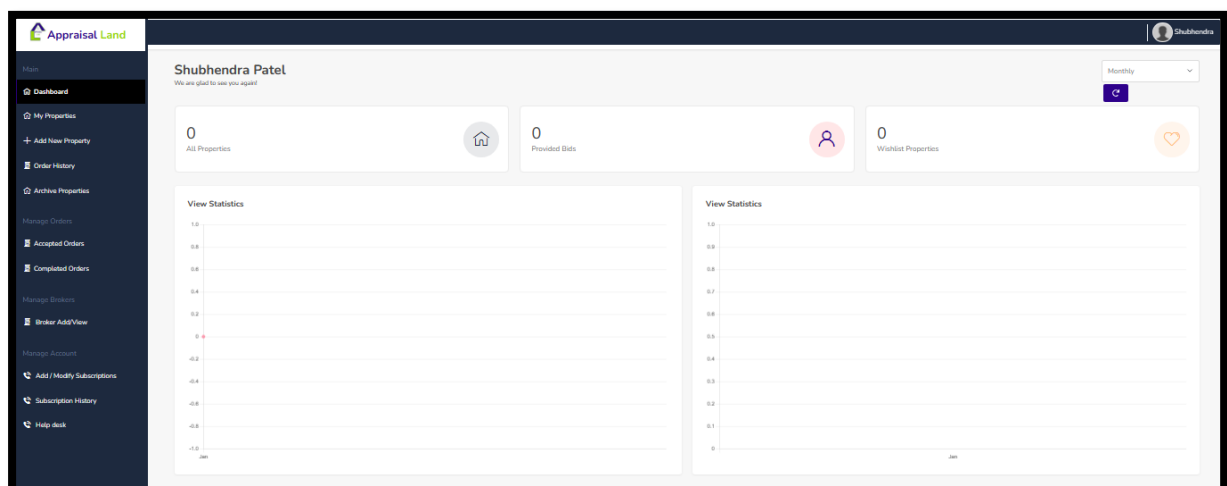
MAIN

BROKERAGE MORTGAGE HOME PAGE

Broker homepage is designed to provide you with real-time insights into the performance and engagement metrics of your property listings.

Below are the menu options available for the broker:

1. Dashboard
2. My properties
3. Add New Property
4. Order History
5. Archive Properties
6. Accepted Orders
7. Completed Orders
8. Broker Add/View
9. Add/Modify Subscriptions
10. Subscription History
11. Help Desk



1.	All Properties	Overview of all listed properties.
2.	Provided Bids	Aggregate count of bids across all listings.
3.	Wishlist Properties	Preferred properties for future reference.
4.	View Statistics	Comprehensive data on individual property performance.

My properties:

To navigate my properties select my properties on the left menu bar.

1.	Order ID	Order ID is a unique identifier assigned to a specific purchase or transaction.		
2.	Property Address	This refers to the location or physical address of the property.		
3.	Quote Status	Below are the various order status types. 1. In Progress 2. Quote Provided 3. Accepted 4. Completed 5. Cancelled 6. On Hold		
4.	Appraisal Status	Below are the various appraisal status types. 1. Appraiser Assigned 2. Applicant Contacted by appraiser 3. Appraisal Visit Confirmed 4. Appraisal Report Writing in Progress 5. Assignment on Hold, 6. Assignment Cancelled, 7. Appraisal visit completed; report writing is pending until fee received		
5.	Urgency	<ul style="list-style-type: none">• Rush• Regular		
6.	Order Submission Date	The date has to be displayed in mon,dd,yy 00:00:00 am/pm Jan, 02, 2023		
7.	Appraisal Report Required By	The date requested for the report.		
9.	Type of Property	Several property types are outlined below.		
		1.	Condo Apartment	A condo apartment is a residential unit within a condominium complex, typically individually owned and managed, offering a combination of private living space and shared amenities.
		2.	Commercial	Pertaining to properties intended for business or profit-making activities.
		3.	Condo Townhouse	A Condo Townhouse is a type of residential property that combines individual ownership with shared common areas. It often features multiple floors and shared walls within a larger complex.
		4.	Detached	A standalone residential property not connected to other structures.
		5.	Freehold Townhouse	A townhouse with ownership of both the building and the land it sits on.
6.	Industrial	Related to properties designed for manufacturing, production, or other industrial activities.		

		7.	Other	Refers to property types not explicitly categorized in the given options.
		8.	Semi-Detached	A residential property sharing one common wall with another dwelling.
10.	Estimated Value / Purchase Price	It is worth or cost of a property, serving as a valuation of the property. A comma is placed every third digit to the left of the decimal point and so is used in numbers with four or more digits. Continue to place a comma after every third digit. For example: \$1,000,000 (one million dollars)		
11.	Type of Appraisal	There are 7 types of appraisals are. 1. Desktop 2. Driveby 3. Full appraisal 4. Desktop with market rent 5. Driveby with market rent 6. Full appraisal with market rent 7. Other		
11.	Purpose	There are 6 types of purposes. 1. Asset valuation 2. Capital gain 3. Matrimonial 4. Other 5. Purchase 6. Refinance		
12.	Lender Information	It refers to details and data related to the entity or individual providing financial resources.		
13.	Broker	Access to the Broker Information link will be granted upon quote acceptance, with two exceptions: 1. If the broker accepts the quote, both the broker information link and property details will be visible. 2. If the broker rejects the quote, the status will be displayed as "Declined."		
14.	Property	The link containing property Information will be accessible after the acceptance of the quote.		
15.	Actions	Types of actions are as follows: 1. Property Details 2. Edit Property 3. On Hold 4. Order Cancel 5. Archive Property		

+ Add New Property

Property Details

Property Details	
Street Number *	<input type="text"/>
Street Name *	<input type="text"/>
Unit / Apt. No.	<input type="text"/>
City *	<input type="text"/>
Province *	<input type="text" value="Select..."/>
Postal Code *	<input type="text"/>

1.	Street Number	Mandatory	Numerical identifier for the property location.
2.	Street Name	Mandatory	Name of the street where the property is situated.
3.	Unit/Apt. No.	Optional	Optional field for specifying unit or apartment number.
4.	City	Mandatory	City or urban area where the property is situated.
5.	Province	Mandatory	Choose from the dropdown menu for the regional or state classification of the property.
6.	Postal Code	Mandatory	Alphanumeric code for postal delivery.

Additional Property Information	
Property Type *	<input type="text" value="Select..."/>
Estimated Value / Purchase Price (\$) *	<input type="text"/>
Purpose *	<input type="text" value="Select..."/>
Type of Appraisal *	<input type="text" value="Select..."/>
Lender Information	<input type="text"/>
Urgency * ⓘ	<input type="text" value="Select..."/>
Appraisal Report Required By *	<input type="text" value="dd-mm-yyyy --:--"/>

Additional Property Information

1.	Property Type	Mandatory	Choose from the dropdown menu		
			1.	Condo Apartment	A condo apartment is a residential unit within a condominium complex, typically individually owned and managed, offering a combination of private living space and shared amenities.
			2.	Commercial	Pertaining to properties intended for business or profit-making activities.

			3.	Condo Townhouse	A Condo Townhouse is a type of residential property that combines individual ownership with shared common areas. It often features multiple floors and shared walls within a larger complex.
			4.	Detached	A standalone residential property not connected to other structures.
			5.	Freehold Townhouse	A townhouse with ownership of both the building and the land it sits on.
			6.	Industrial	Related to properties designed for manufacturing, production, or other industrial activities.
			7.	Other	Refers to property types not explicitly categorized in the given options.
			8.	Semi-Detached	A residential property sharing one common wall with another dwelling.
2.	Estimated Value / Purchase Price (\$)	Mandatory	Numeric input required. A comma is placed every third digit to the left of the decimal point and so is used in numbers with four or more digits. Continue to place a comma after every third digit. For example: \$1,000,000 (one million dollars).		
3.	Purpose	Mandatory	Select from the dropdown menu		
			1. Asset valuation 2. Capital gain 3. Matrimonial 4. Other 5. Purchase 6. Refinance		
4.	Type of Appraisal	Mandatory	Select from the dropdown menu		
			1. Desktop 2. Driveby 3. Full appraisal 4. Desktop with market rent 5. Driveby with market rent 6. Full appraisal with market rent 7. Other		
5.	Lender Information	Optional	The lender information is mandatory when the user is selected the purpose as purchase or refinance.		
6.	Urgency	Mandatory	Select from the dropdown menu		
			1.	Regular	Indicates a standard or normal scenario.
			2.	Rush	Urgent or expedited
7.	Appraisal Report Required By		Choose a date from the calendar icon.		

Applicant / Owner Information

First Name *

Last Name *

Phone Number *

Email Address *

Remark / Additional Information

Attachment

Upload Files

Submit

Applicant/Owner Information.

1.	First Name	Kindly provide applicant first name.
2.	Last Name	Please enter your last name.
3.	Phone Number	Fill in your contact number.
4.	Email Address	Provide your email address.
5.	Remark/Additional Information	Include any relevant comments or additional details.
6.	Attachment	Upload files or documents using this feature.

ORDER HISTORY

Pending cz website isn't working

ARCHIVE PROPERTIES

This feature allows for systematic storage and retrieval of past property assessments, streamlining record-keeping and facilitating comprehensive historical analysis.

1. ORDER ID ORDER ID IS A UNIQUE IDENTIFIER ASSIGNED TO A SPECIFIC PURCHASE OR TRANSACTION.

2.	Property Address	This refers to the location or physical address of the property.
3.	Quote Status	Below are the various order status types. <ol style="list-style-type: none"> 1. In Progress 2. Quote Provided 3. Accepted 4. Completed 5. Cancelled 6. On Hold

4.	Appraisal Status	Below are the various Appraisal status types. <ol style="list-style-type: none"> 1. Appraiser Assigned 2. Applicant Contacted by appraiser 3. Appraisal Visit Confirmed 4. Appraisal Report Writing in Progress 5. Assignment on Hold, 6. Assignment Cancelled, 7. Appraisal visit completed; report writing is pending until fee received 																								
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8.	Type of Property	<p>The below property types will be available for the appraisal which are selected during the property submission by the broker.</p> <table> <tr> <td>1.</td><td>Condo Apartment</td><td>A condo apartment is a residential unit within a condominium complex, typically individually owned and managed, offering a combination of private living space and shared amenities.</td></tr> <tr> <td>2.</td><td>Commercial</td><td>Pertaining to properties intended for business or profit-making activities.</td></tr> <tr> <td>3.</td><td>Condo Townhouse</td><td>A Condo Townhouse is a type of residential property that combines individual ownership with shared common areas. It often features multiple floors and shared walls within a larger complex.</td></tr> <tr> <td>4.</td><td>Detached</td><td>A standalone residential property not connected to other structures.</td></tr> <tr> <td>5.</td><td>Freehold Townhouse</td><td>A townhouse with ownership of both the building and the land it sits on.</td></tr> <tr> <td>6.</td><td>Industrial</td><td>Related to properties designed for manufacturing, production, or other industrial activities.</td></tr> <tr> <td>7.</td><td>Other</td><td>Refers to property types not explicitly categorized in the given options.</td></tr> <tr> <td>8.</td><td>Semi-Detached</td><td>A residential property sharing one common wall with another dwelling.</td></tr> </table>	1.	Condo Apartment	A condo apartment is a residential unit within a condominium complex, typically individually owned and managed, offering a combination of private living space and shared amenities.	2.	Commercial	Pertaining to properties intended for business or profit-making activities.	3.	Condo Townhouse	A Condo Townhouse is a type of residential property that combines individual ownership with shared common areas. It often features multiple floors and shared walls within a larger complex.	4.	Detached	A standalone residential property not connected to other structures.	5.	Freehold Townhouse	A townhouse with ownership of both the building and the land it sits on.	6.	Industrial	Related to properties designed for manufacturing, production, or other industrial activities.	7.	Other	Refers to property types not explicitly categorized in the given options.	8.	Semi-Detached	A residential property sharing one common wall with another dwelling.
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12.	Lender Information	It refers to details and data related to the entity or individual providing financial resources.
13.	Broker	The link containing Broker Information will be accessible after the acceptance of the quote.
14.	Property	The link containing property Information will be accessible after the acceptance of the quote.
15.	Actions	<ol style="list-style-type: none"> 1. Property Details 2. Edit Property 3. On Hold 4. Order Cancel 5. Archive Property

MANAGE ORDERS

ACCEPTED ORDERS:

This feature signifies a streamlined system for acknowledging and managing confirmed appraisal requests, ensuring clarity in order processing and timely client communication.

COMPLETED ORDERS:

This feature facilitates organized tracking and management of confirmed appraisal assignments, ensuring efficient order processing and timely communication with clients.

MANAGE BROKERS

BROKER ADD/VIEW:

Add Broker

Who Brokers are?

Broker serve as members of the broker company.

How to add broker?

To add appraisers to your company, navigate to “Broker Add/View” on the appraiser company home page → “Add Broker”. (the top-right corner)

Simply provide the following details: -

1. Username/Email
2. Password
(Must include uppercase, lowercase, numbers, symbols, and be 8-15 characters long.)
3. Re-enter Password

After adding, you will be able to see the appraiser in the list of appraisers in "add/view appraiser"

SCREENSHOT WILL BE THERE

- Each appraiser is assigned an individual login ID for their work.
- Appraisers will have access only to the specific property assigned by the appraiser company.
- The appraiser is responsible for updating the status after each stage, and this status is visible to the appraiser company.

SCREENSHOT WILL BE THERE

This feature provides a user-friendly interface for brokers to add their profiles and allows users to view comprehensive information about appraisers, fostering transparency and effective collaboration.

Status Details

Until the user logs in, the status will remain “**not-registered**”. However, once logged in, the status will be displayed as “**active**” to the mortgage broker. The mortgage broker has the capability to set any broker's status to “**inactive**”.

MANAGE ACCOUNT

Add/Modify Subscriptions

There are three plan options available on both a monthly and yearly basis.

MONTHLY PLAN

1.	Ultimate	1.	100 Properties Appraisal
		2.	30 Days Validity
		3.	No Roll Over
		4.	Limited Support
		5.	\$149
2.	Pro	1.	20 Properties Appraisal
		2.	30 Days Validity
		3.	Partial Roll Over
		4.	Enhanced Support
		5.	\$99
3.	Lite	1.	10 Properties Appraisal
		2.	30 Days Validity
		3.	Unlimited Roll Over
		4.	Complete Support
		5.	\$49










YEARLY PLAN			
1.	Ultimate	1.	100 Properties Appraisal
		2.	365 Days Validity
		3.	Partial Roll Over
		4.	Limited Support
		5.	\$1639
2.	Pro	1.	20 Properties Appraisal
		2.	365 Days Validity
		3.	Partial Roll Over
		4.	Complete Support
		5.	\$1089
3.	Lite	1.	10 Properties Appraisal
		2.	365 Days Validity
		3.	Unlimited Roll Over
		4.	Complete Support
		5.	\$539

SUBSCRIPTION HISTORY

Within this section, you'll discover your complete transaction history, and you also have the option to make updates to your plan.

Help Desk

Within the help desk section, you will locate various contact details such as our office information, office hours, support hours, contact numbers, and chat options.

<p>Office</p> <p> XYZ street Model Town British Columbia Canada Pin Code 123456</p>	<p>Hours</p> <p> Office Hours Monday - Friday : 8 AM - 5 PM ET</p> <p> Support Hours Monday - Friday : 7 AM - 6 PM ET</p>	<p>Contact</p> <p> +1 302-000-1111</p> <p> +1 302-000-1111</p> <p> info@appraisalink.com</p>	<p>Chat</p> <p>Chat with us online !</p> <p>Follow Us on !</p> <p>    </p>
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Please provide these details to reach out to us.

1.	First Name	Kindly provide your first name
2.	Last Name	Kindly provide your last name.
3.	Email Address	Please provide your email address.
4.	Phone Number	Please provide your phone number.
5.	Company	Please provide the name of your company.
6.	Province Please	Kindly specify your province.
7.	Subject	Please indicate the title of the query you are inquiring about.
8.	Description	Please indicate the title of the query you are inquiring about.
9.	Check box	Kindly check the checkbox to proceed to the next step.
10.	Submit	Kindly submit the form.