DESCRIPTION

Client Approval Process

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SUMMARY

This document will walk you through the approval process after a client signs up within your Appraisal Scope Platform.

DETAILS

Client verification process for approval after registration

SCREENCAST:

http://somup.com/cFVXFRVvnz

STEP-BY-STEP

1.   Login to Appraisal Scope.
2.   Navigate to the Users Tab within the product.
3.   From here you will need to select Pending Users.
4.   Within the Pending Users tab you will need to select Pending Clients and review the list of companies or simply search on the left side of the screen to find the company you are looking to approve or review.
5.   Once the company is found you will be presented with two options. The first will be Approve and the second is Delete. We are going to cover Approve first. When the Approve button is selected a new screen will appear. This screen is called the Client Validation window.
6.   Within the Client Validation window, you will be presented with all the information that was provided by the client when they registered. At this point in the process you can review the data on screen. To ensure this company doesn't already exist you will need to search by the company name or email that they entered when the registered.
7.   After you type in the company name and select Search a list of possible matches will be present for you to select. This is where a decision will need to be made. Are we entering a new company or are we simply updating an existing company with a new user.
8.   In this example we are going to assume there is already a company entered in the system and we are simply signing up a new user. But if there was not a company found in the search simply selecting Register at the bottom of the Client Validation window will create the company, branch, and user that is entered within the Client Validation window.

9. After I entered Tobiason Lending into the search field it returned one result.

10. I am going to select the company from the search grid. I will be provided the company directly below the search button. This will allow me to select the company that the search returned as the company I wish to update with a new user or branch information based on the data submitted for registration.

Search

Company Name:

| Tobiason Lending |
| Tobiason Lending |
| |

Search   Clear

Company Details:

	Company Name	Address	Action
1	Tobiason Lending	341 E Plantation Terrace	Pick >>

11. Within the Action column there is an option to select this company and this will update the company information on the right with the information that already exists in your platform. This will help prevent duplicate companies from being entered into the product. If no company selection is made and the Register button is selected then a new company will be created within your platform.

12. In our example I am going to choose Pick >> and then it will provide me with a list of Branches that I can select from in the same fashion as the company selection.

Branch Details:

	Branch Name	Address	Action
1	Default Branch		Pick >>
2	East Branch		Pick >>
3	New Branch		Pick >>
4	North Branch	408 E Plantation	Pick >>
5	South Branch	409 E Plantation Terrace	Pick >>
6	Wholesale		Pick >>

13. This will allow you to decide does the branch information entered by the client at registration already exist in the system or should it be created as a new branch. If you select Pick >> next to a row you will be updating the information in the Branch Information section. If no Branch is selected and the Register button is used, then the Client Company selected will be updated with a new Branch and User based on the information provided by the client.

14. At this point in the validation process we only have one section left to discuss and this is the User Information section. In our example today, I am going to pick a branch to demonstrate the

system's ability to provide users that already exist so you can verify you aren't creating duplicates.

15. Now you must review the information entered by the user and determine if the user data provided matches an existing user. If the data does not match, then you will choose Register and if they do match you can simply choose them via the Pick >> option and choose register. Which will not create a duplicate in the system or if you do not select Pick >> next to a user and simply click Register then it will create a new user within the Client Company and assign that user to the Branch you selected.

Company Details:

	Company Name	Address	Action
1	Tobiason Lending	341 E Plantation Terrace	Pick >>

Branch Details:

	Branch Name	Address	Action
1	Default Branch		Pick >>
2	East Branch		Pick >>
3	New Branch		Pick >>
4	North Branch	408 E Plantation	Pick >>
5	South Branch	409 E Plantation Terrace	Pick >>
6	Wholesale		Pick >>

User Details:

	Name	Address	Action
1	Loan Officer	341 E Plantation Terrace	Pick >>
2	Manager	341 E Plantation Terrace	Pick >>

Please ensure you view the attached Screen Cast to see everything in action within one of our Demo environments.