



Agent App Onboarding + FastTrack

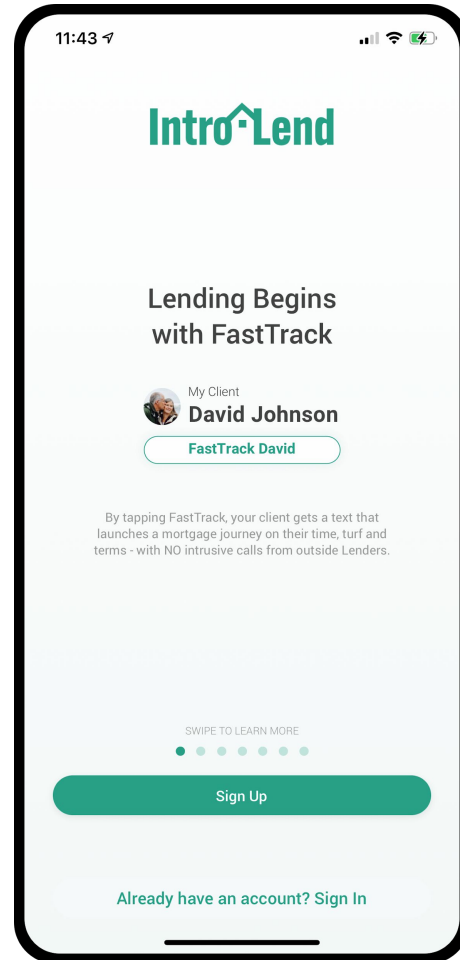
Setting up your IntroLend app account & sending a FastTrack



Self-Onboarding to the App

Once your IntroLend account has been reserved, it's easy to complete the app signup process.

Simply click on the green "Sign Up" button.





Enter your Mobile Number

Enter your mobile number that was used to reserve your account.

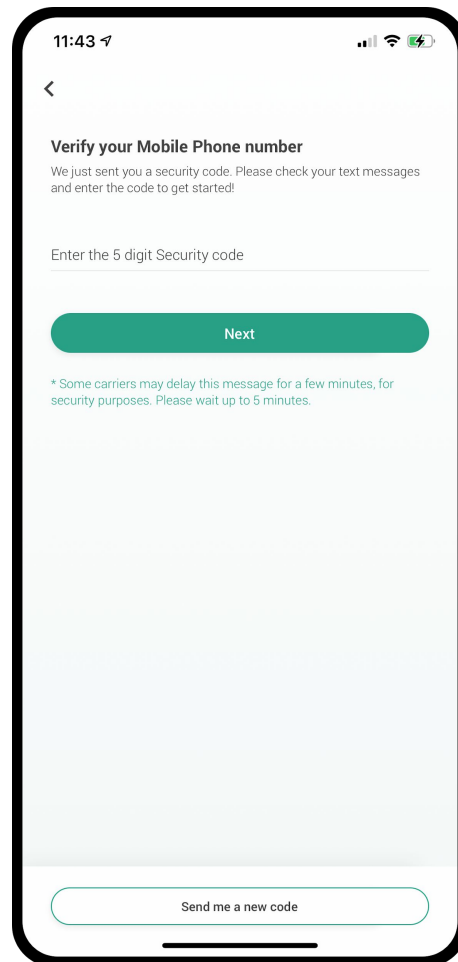
Click "Next" once your number is entered.

A screenshot of the IntroLend mobile app sign-up screen. The screen is white with a black border. At the top, the status bar shows the time 11:43, signal strength, Wi-Fi, and battery icons. Below the status bar is a back arrow and the IntroLend logo. The main heading is "Sign Up with IntroLend" in bold. Below it is a subtext: "Enter your mobile number to sign up so you can service all of your client's lending needs and increase your annual profits." There is a text input field labeled "Mobile Phone Number". At the bottom, there is a large teal button with the word "Next" in white.



Enter your Verification Code
Check our SMS message which
contains your 5 digit security code.

Click "Next" once your code is entered.





Create a Password

Now that your code is verified,
create a Password for your
account.

Click "Next" after creating your password.

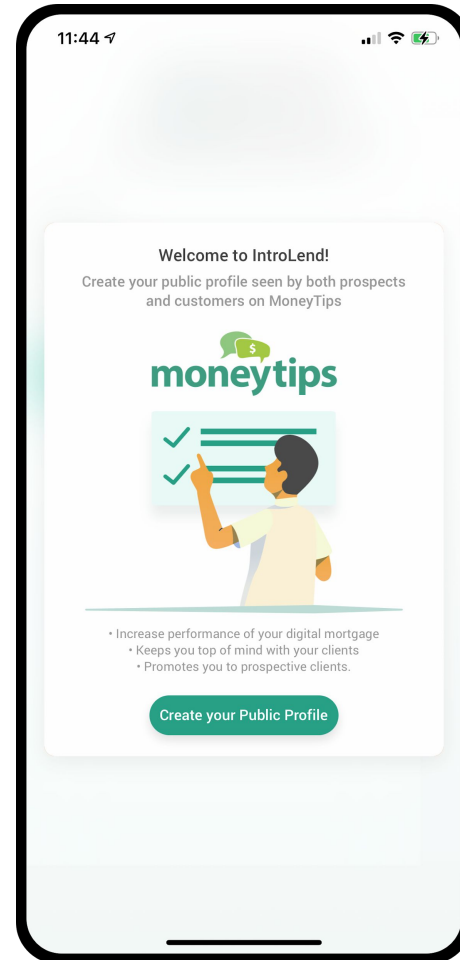
A screenshot of a mobile application interface for creating a password. The screen is white with a black border. At the top, the status bar shows the time 11:44, signal strength, Wi-Fi, and battery icons. Below the status bar is a back arrow icon. The main text reads "We identified you!" followed by "Now set up your unique password". Below this is a note: "Passwords must have at least 6 characters." There are two input fields: "New password" and "Confirm new password". Below the input fields is a green rounded button labeled "Next". At the bottom, there is a line of text: "By proceeding, I agree with IntroLend's" followed by a link "Terms and Conditions" in green.



Create Your Agent Profile

Now it's time to create your public profile, so consumers can learn more about you.

Click "Create your Public Profile" to get started.





First and Last Name

Add your name.

Click "Next" to proceed.

A screenshot of a mobile application interface for creating a public profile. The screen is white with a black border. At the top, the status bar shows the time 11:44, signal strength, Wi-Fi, and battery icons. Below the status bar, the title "Create your public profile" is centered, followed by a progress bar with a green segment. The instruction "Let consumers know who you are" is centered below the progress bar. There are two input fields: "First Name" with the text "henry" and "Last Name" with the text "min". A green rounded button labeled "Next" is centered below the input fields. The bottom of the screen shows a black home indicator bar.



Contact Details

Add a number and website where consumers can reach you.

Click "Next" to proceed.

(Optional step can be skipped and accessed via account settings at a later time)

A screenshot of a mobile application interface for creating a public profile. At the top, the status bar shows the time 11:44 and signal icons. The app header includes a back arrow, the title "Create your public profile", and a progress indicator. The main heading is "How can you be contacted?", followed by the subtext "Lenders and clients might need to get in touch with you". There is a text input field for a phone number, with the label "Phone number" and the value "(516) 430-3393". Below this is an optional field with a plus icon and the text "Add a website (optional)". A large teal "Next" button is positioned below the input fields. At the bottom of the screen, there is a link that says "Skip for later".

11:44

< Create your public profile

How can you be contacted?

Lenders and clients might need to get in touch with you

Phone number
(516) 430-3393

+ Add a website (optional)

Next

Skip for later



Work Address

Add a work address, so consumers know where to find you.

Click "Next" to proceed.

(Optional step can be skipped and accessed via account settings at a later time)

A screenshot of a mobile application interface. At the top, the status bar shows the time 11:44, signal strength, Wi-Fi, and battery icons. Below the status bar is a navigation bar with a back arrow on the left and the title "Create your public profile" in the center. A progress indicator shows the first step is complete. The main heading is "What is your work address?" followed by a subtext: "This will help us recommend you to customers near you". The form consists of four input fields: "Street, number", "City", "State", and "Zipcode". A large teal "Next" button is positioned below the form. At the bottom of the screen, there is a link that says "Skip for later".

11:44

< Create your public profile

What is your work address?

This will help us recommend you to customers near you

Street, number

City

State Zipcode

Next

Skip for later

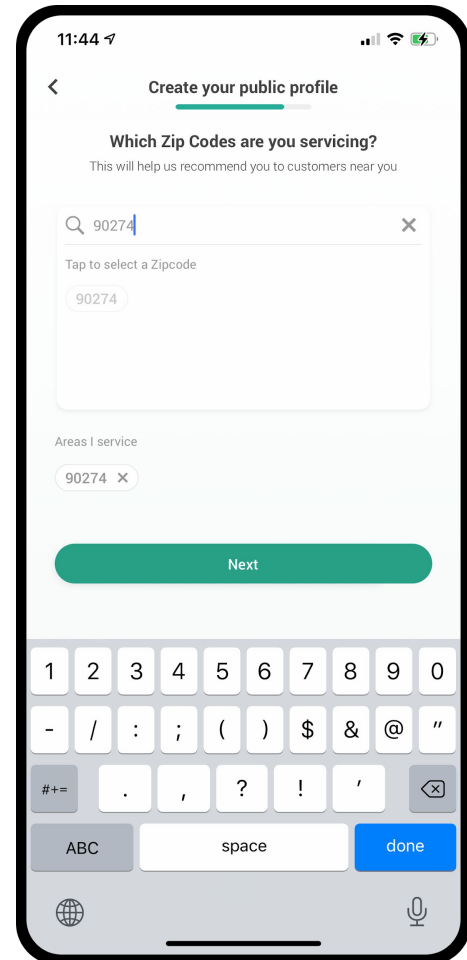
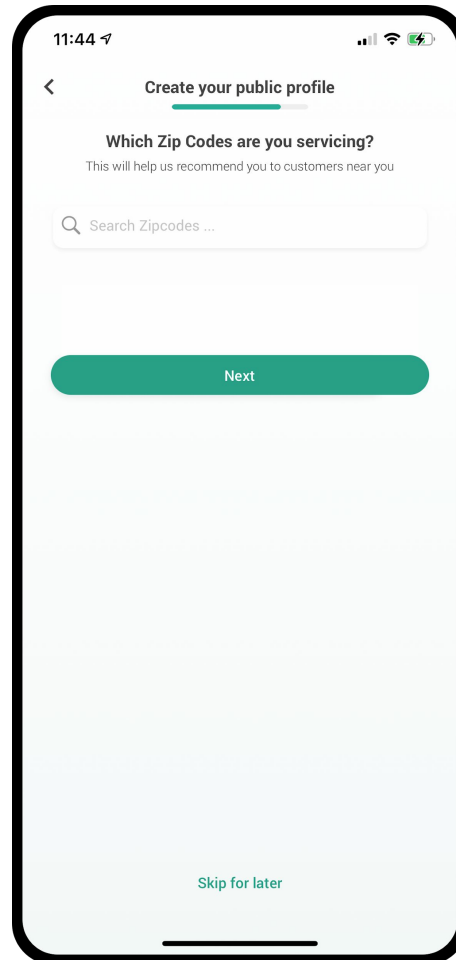


Areas You Serve

Add zip codes for all of the areas you service. This will help us refer new customers to you.

Click "Next" to proceed.

(Optional step can be skipped and accessed via account settings at a later time)



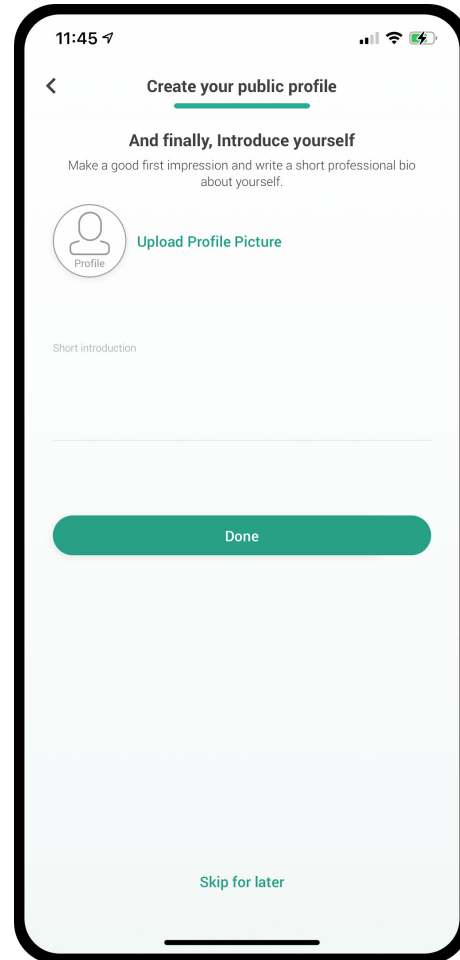


Profile Photo & About Me

Make a great first impression by adding your profile photo and a short professional bio.

Click "Done" once finished.

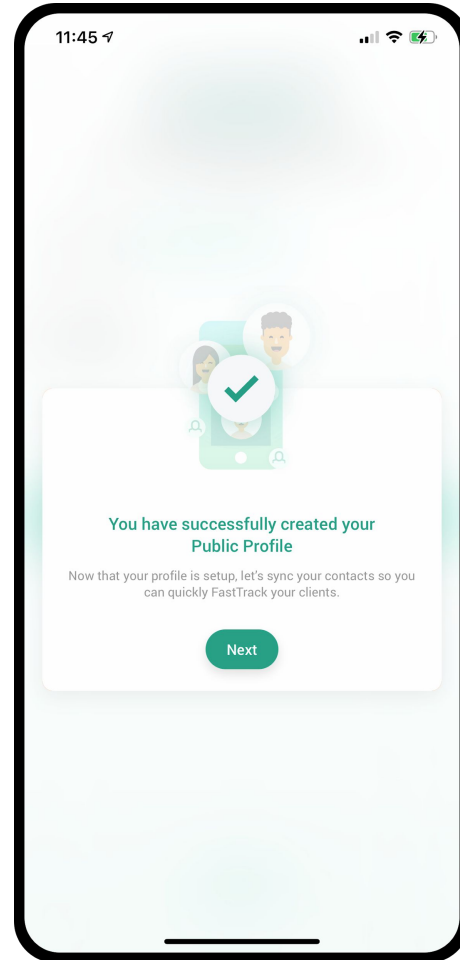
(Optional step can be skipped and accessed via account settings at a later time)





Profile Complete!
Congratulations! Your profile is complete.

Click "Next" to proceed to your dashboard.
That's where you can send a FastTrack to clients.

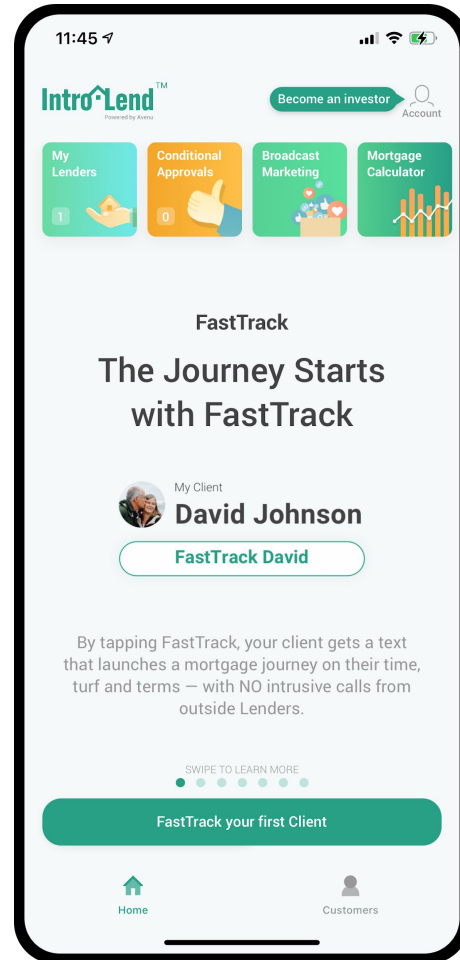




Dashboard

The Dashboard is your homepage, where you can launch our amazing tools. For starters, let's send a FastTrack!

Click the big green "FastTrack Your First Client" button to launch a FastTrack..

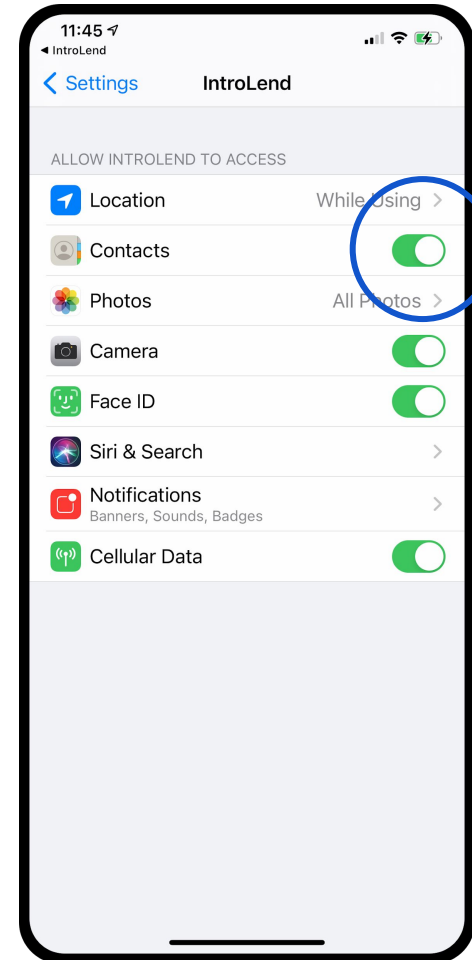
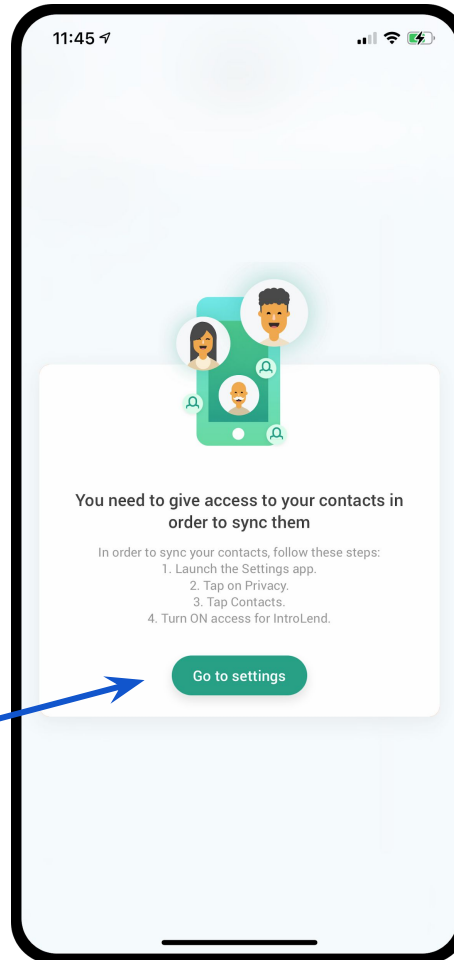




Permission to Access Contacts

If this is your first time, we suggest you allow the app access to your contacts. This makes it simple to launch a FastTrack.

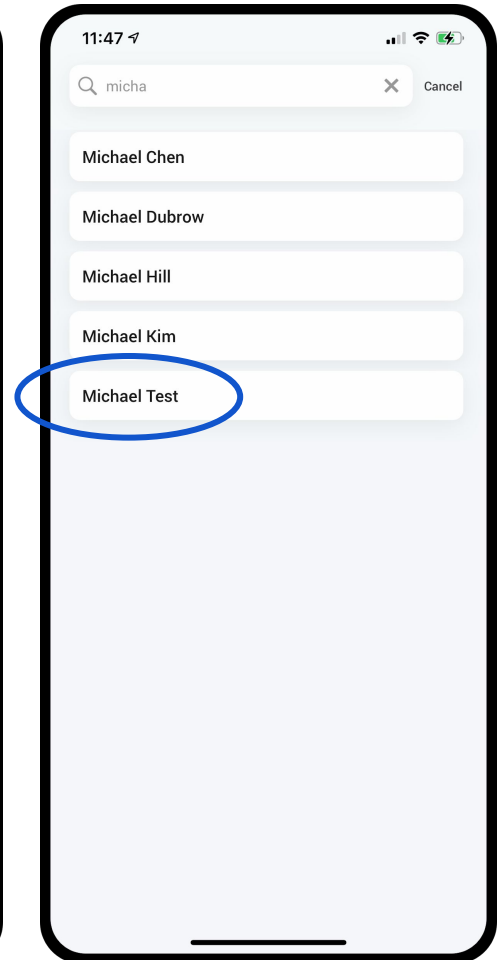
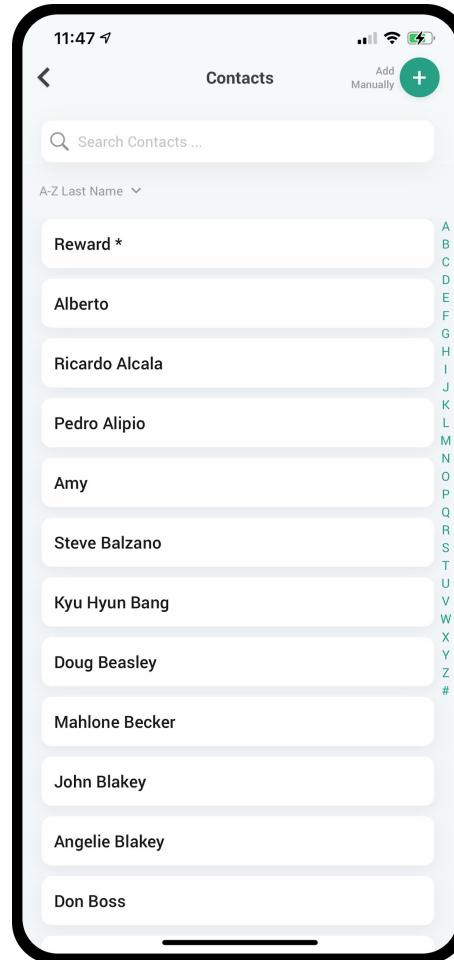
Click the “Go to Settings” button to allow access.





Choose a Contact to FastTrack
Easily search or scroll to find the contact you wish to FastTrack.

Simply tap to select the client you want to FastTrack

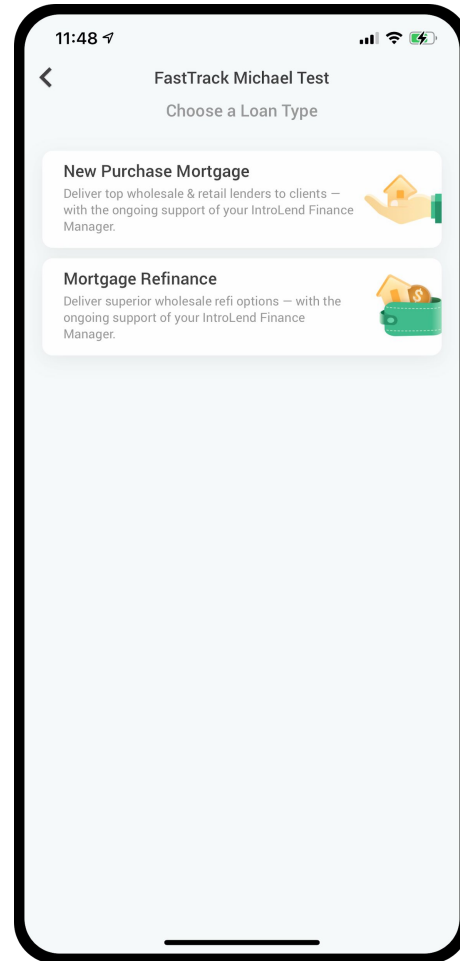




Choose a Loan Type

Is your client applying for a new purchase loan or a mortgage refinance?

Select a loan type to proceed.

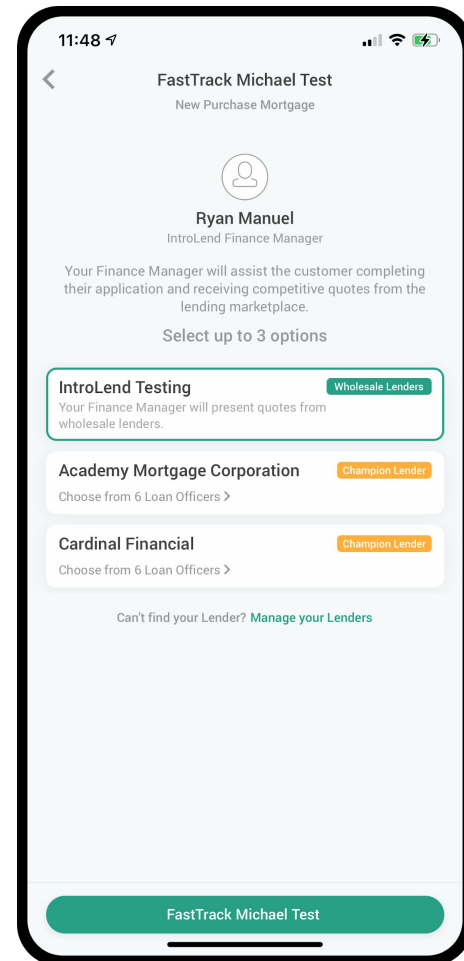
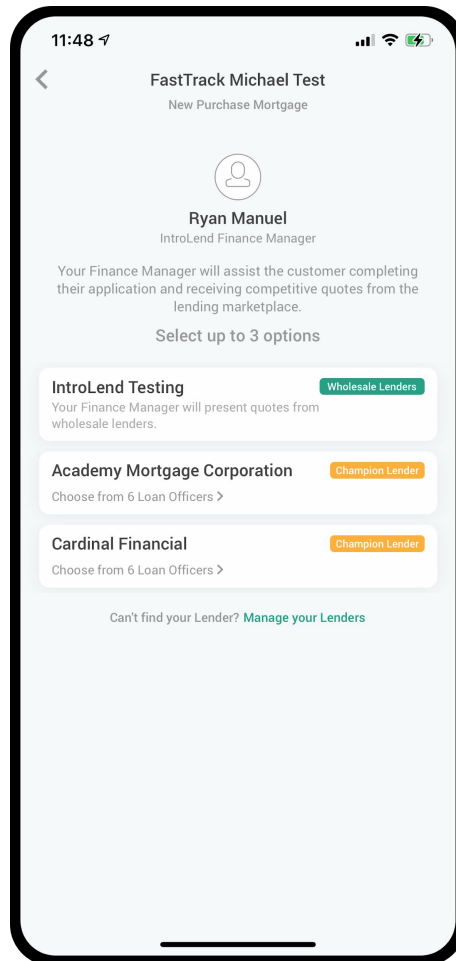




Select Your Lenders

Choose up to three lenders from our large network. (You can also invite your current favorites to join the network.) Select your lenders, including wholesale. This ensures your client gets the most competitive mortgage rate & terms.

Select your lenders and click the "FastTrack" button.





FastTrack Sent!

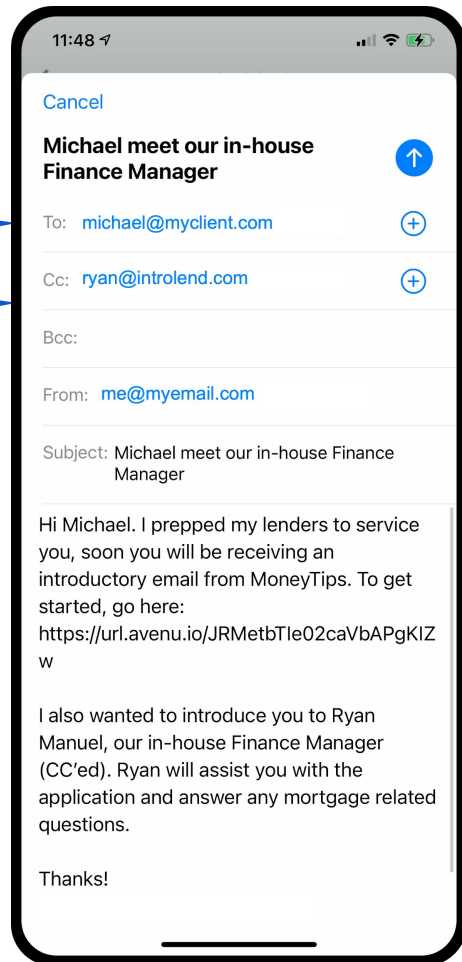
Within the FastTrack text, your in-house Finance Manager is introduced. This assures your client of professional support in their mortgage journey.

Sending this email makes a smooth introduction to your Finance Manager. Feel free to customize the body of the email as you see fit.

Your clients email address

Your Finance Mgr is CC'ed

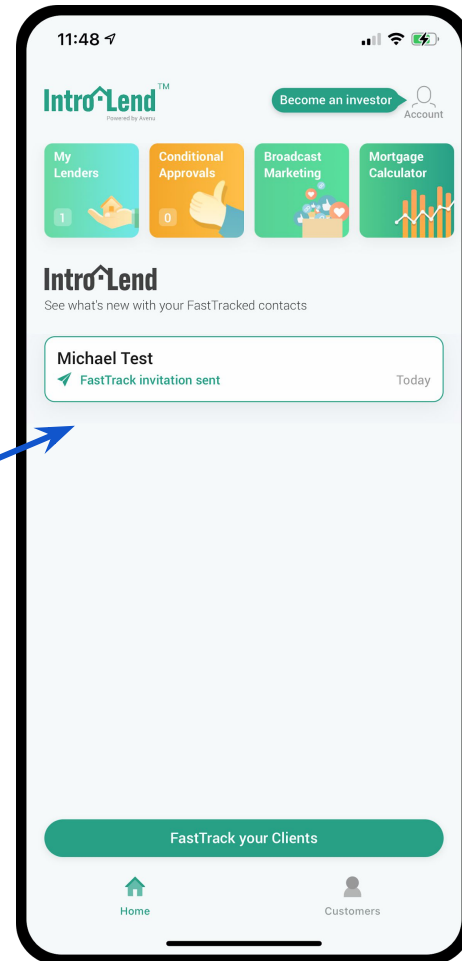
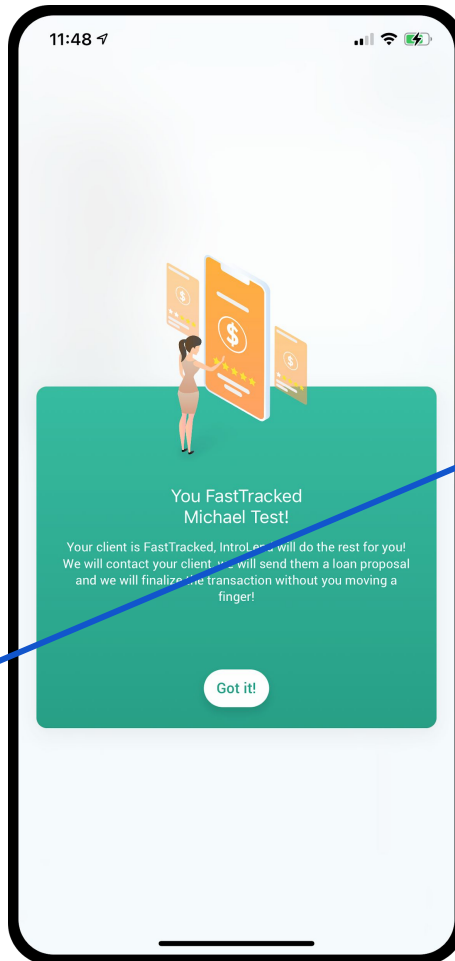
Your email makes a formal introduction so your Finance Mgr is ready to help.





Congrats!

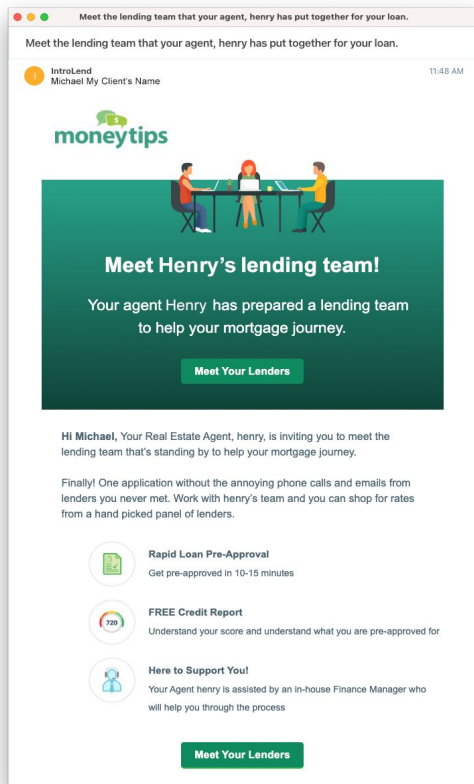
Now that you've successfully completed a FastTrack, your dashboard will monitor the client's status, and keep you updated about every step in the loan progression.





BTW, What does my client see when I FastTrack them?
Here's a preview of the email & SMS your client receives when you FastTrack them.

Both email and SMS lead your client to the their digital mortgage application on MoneyTips.com. Completing this low-friction application leads to lightning-fast mortgage pre-approval.

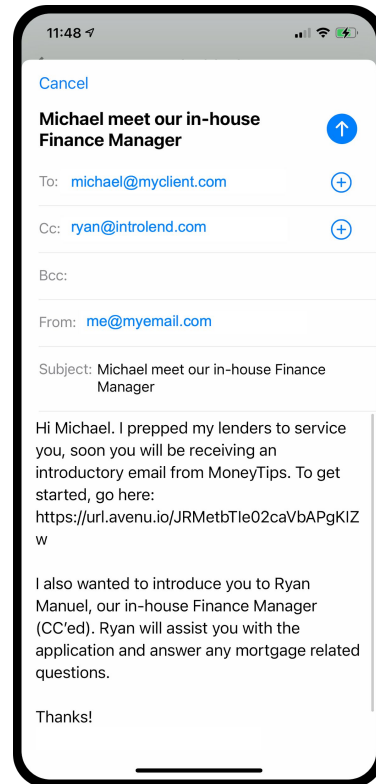


Start Your Digital Mortgage Application Email

Hi [Client_Name], Your real estate Agent [Agent_Name] has invited you to start your mortgage application here [LinkGoesHere], in order to get fast pre-approval. Call [Agent_Name] if you have any questions.

Delivered

Start Your Digital Mortgage Application SMS



Meet the Finance Manager Email



Thank You!