

A Quick-Start Guide for Agents



1. It all starts with a Download of the IntroLend Agent App!

Go to your smartphone App store and download the IntroLend App.



2. Complete Setup/Registration to log-in.

It takes just a few moments to create your branded mortgage center.



3. In upper right corner, click "Account" circle to edit your Public Profile.

Then, personalize your Profile with contact info and a picture!



4. Navigate back to Home Page, and click on "My Lenders"

You control the lending options sent to your client. The *Wholesale Lenders* selection ensures competitive bids from up to 75 lenders. You can also choose from other Approved lenders, and invite your own.



5. We'll help you add your favorite loan officers/lenders to our platform

If your favorite loan officer isn't currently on our platform, don't worry. You can search for them — and invite them to join — right on the app! Our amazing lender onboarding team will do the rest.



6. One online mortgage application accesses multiple lenders.

Your client fills out our simple online application to access multiple lenders. This ensures a highly competitive mortgage bid process, which is expertly managed by your in-house Finance Manager.



7. Click the green FastTrack button at bottom of Home screen...

To send FastTrack text to your client, and launch their mortgage journey!



8. Allow your personalized email introduction to also be sent.

This warm introduction of your client to their Finance Manager comes professionally branded from you!

David Perez
Executive Finance Manager

IntroLend Exceed
dperez@IntroLend.com
Mobile: 512-420-7354
NMLS #224827

Mortgage applicant(s) are subject to credit, income, asset and final underwriting approvals by the end-lender. Estimated savings disclosed, if any, vary based on the applicants' overall credit profile, product, interest rate availability in the marketplace, and other factors. IntroLend Exceed NMLS 1928173.

