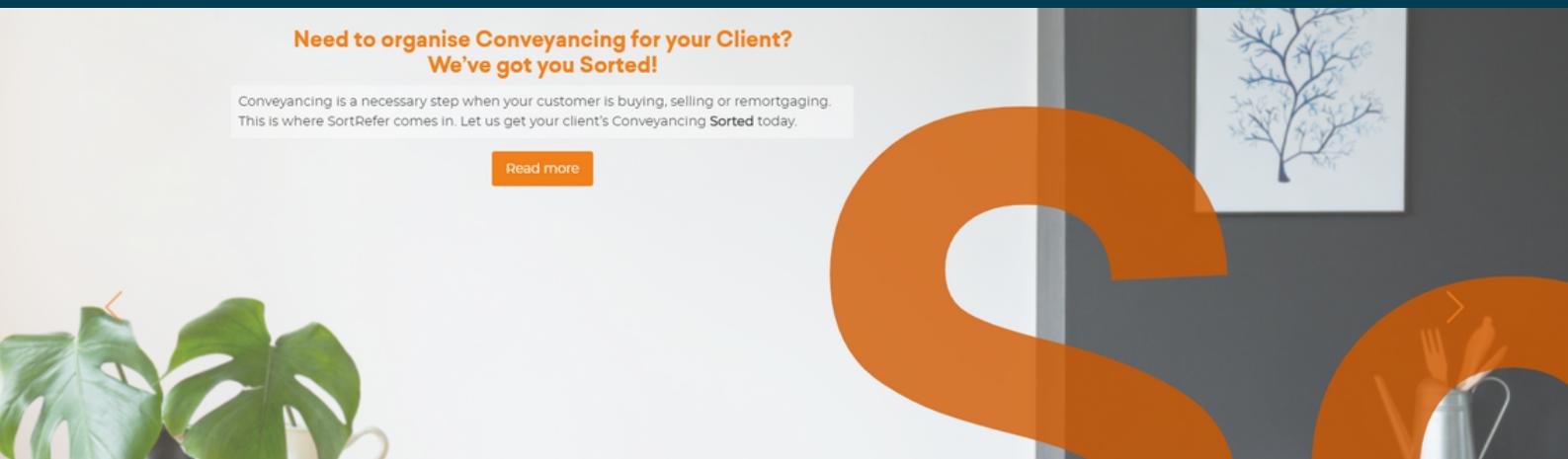


An brief introduction to our SortRefer portal

We've got you Sorted!



Need to organise Conveyancing for your Client? We've got you Sorted!

Conveyancing is a necessary step when your customer is buying, selling or remortgaging. This is where SortRefer comes in. Let us get your client's Conveyancing **Sorted** today.

[Read more](#)

Welcome

As a registered user, you'll now have access to many of our benefits, like our large selection of products to assist your clients throughout their home move process whilst earning an additional income stream - just to name a couple. Now, let's introduce you to the basics of our portal!

Watch our site navigation video [here](#) or read on to learn more...

Your Dashboard

Once you've signed into your SortRefer account, your dashboard will look a lot like this:

The dashboard features a dark sidebar on the left with links to Home, Quote / Refer, Our Technology, Our Suppliers, Case Manager, Firm Manager, White Label, Broker Toolkit, Admin Area, and a date last logged in (17th Aug 10:56am). The main content area includes:

- My Cases:** A summary of activity with categories: Saved Quotations & Referrals (0), Cases Awaiting Acceptance (0), Active Cases (0), Completed Cases (0, with a 'Lead' button), Archived Cases (0), Declined Cases (0), and Cancelled Cases (0, with a 'Lead' button).
- Firm Activity:** A line graph showing recent activity over time, with legends for Quotes (green), Instructions (blue), and Completions (orange).
- Quick Links:** Buttons for Sale, Purchase, Remortgage, Fixed Price Remortgage, Transfer of Equity, Equity Release Remortgage, Equity Release Sale, Equity Release Purchase, and More Products.
- Latest News:** A section with a banner for the 'Super Survey Bonus' (03 JULY - 30 SEPTEMBER 2023) and a 'Target HCA/Home' section.

On your dashboard, you'll have an overview of your active, completed, deleted and cancelled cases in the middle as well as other elements like 'quick links' and 'latest news' on the right. On the left is where you'll find the main tabs to use when navigating your way through your dashboard...



You have 0 unread messages

[Home](#)

[Quote / Refer](#)

[Our Technology](#)

[Our Suppliers](#)

[Case Manager](#)

[Firm Manager](#)

[White Label](#)

[Broker Toolkit](#)

[Admin Area](#)

Quote/Refer

This is where you'll find our product portfolio.

Once you select your chosen product, this will then take you to a product page where you can find more information, facts, benefits, relevant documents to download.

From here, is where you will continue to create your client's quotation.

Our Technology

In this tab is a general overview of the benefits in our technology - just more of a reminder of our innovative portal.

Our Suppliers

On this page is our entire library of our dedicated suppliers we have on board and integrated within our system. Arranged alphabetically, we have plenty of choice for you and your clients. Here you can also filter your chosen suppliers by language, location or choice of product.

Case Manager

This is where you track yours, your firm's and your staff's most recent cases.

Firm Manager

This is where you can view the activity and that of your staff. Here you can also invite staff into having their own SortRefer account that will be connected to your firm's dashboard. There is a section on this page where you can add personalisation, i.e. your firm's logo, which will then appear on all of your quotations when created. You can also set your own default fees, saving you time inputting them again when filling in your client's quotations.

White Label

This function allows you to create a quoting function within your own website. Simply follow the steps on the site, or take a look at our White Label guides to explore in more detail.

Broker Toolkit

Our toolkit page is popular for hosting resources for you as well as your clients. We have useful documents to download (for your information and client-facing documents), product videos, process videos, case studies and FAQs.

Admin area

On this page is where you can view your weekly statements and where you can control your communication preferences.

Sign into your account to start using our portal [here!](#)

For more information,
please contact our team on:
enquiries@sortrefer.co.uk
0333 456 4567