

# 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!

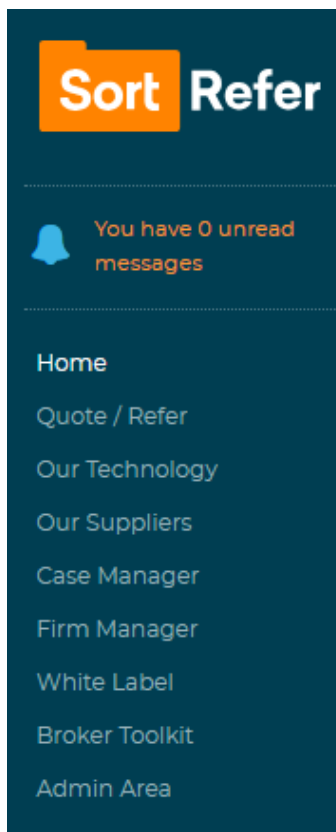
Watch our site navigation video [here](#) or read on to learn more...

## Your Dashboard

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

The screenshot displays the SortRefer dashboard for a user named 'Marketing'. The interface includes a dark blue sidebar on the left with navigation links: Home, Quote / Refer, Our Technology, Our Suppliers, Case Manager, Firm Manager, White Label, Broker Toolkit, and Admin Area. The main content area is divided into several sections. At the top, a welcome message states: 'Marketing, welcome to your SortRefer dashboard. From here you can Quote / Refer, Track Existing Cases or grow your own community by inviting Staff Members to join SortRefer'. Below this is the 'My Cases' section, which has tabs for 'Firm Cases' and 'Staff Cases'. It lists various case statuses: Saved Quotations & Referrals (0), Cases Awaiting Acceptance (0), Active Cases (0), Completed Cases (0), Archived Cases (0), Declined Cases (0), and Cancelled Cases (0). A 'Load' button is present next to the Completed, Archived, and Cancelled counts. To the right of the case list, a note states: 'This section will provide you with the latest updates on your cases, displaying the most recent notes and tracking events.' Below the cases is the 'Firm Activity' section, which includes a graph showing activity over time, with a legend for Quotes (green), Instructions (blue), and Completions (orange). On the right side of the dashboard, there are 'Quick Links' for Sale, Purchase, Remortgage, Fixed Price Remortgage, Transfer of Equity, Equity Release Remortgage, Equity Release Sale, Equity Release Purchase, and More Products. Below the quick links is the 'Latest News' section, featuring a 'SUPER SURVEY BONUS!' announcement for July to September 2023 and a 'Target HCA/Home' article.

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...



## 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,  
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