


A Purchaser's Guide to CondoCerts

Login to CondoCerts -

To submit a request with **CondoCerts**, log on to www.condocerts.com.

First time users will follow the New Users link to register. Document or print screen the User ID and Password provided. New accounts are immediately activated and available for use. Return to the **CondoCerts** home page at www.condocerts.com and login using the user ID and password provided.

For additional help or assistance, contact **CondoCerts** Customer Service at 1.800.310.6552 or email **CondoCerts** at info@condocerts.com.



[Welcome, test@condocerts.com](#) | [Log Out](#) | [Control Center](#) | [Contact Us](#)

Control Center for Test Title

- ▶ [Place a New Order](#) : Order documents for Sale and Refinance transactions; purchase association documents and lender forms
- ▶ [Modify an Existing Order](#) : Add Rush Delivery and/or Custom Lender Forms; order documents on CD or Hard Copy
- ▶ [Review Orders](#) : View pending and completed orders; view order archives; cancel an order; request document updates
- ▶ [FAQ](#) : Frequently asked questions and other helpful tips
- ▶ [Change Password](#) : Update your password ?

Place an Order:

From the CondoCerts Home page select Place a New Order -

- ▶ Select the type of transaction and click on **Next** to continue.
- ▶ Select Search by Association Name or Search by Property Address and select a State. Abbreviate the name to widen the name search, such as "Harbor" for "Harbor Cove Homeowners Association".
- ▶ Click on **Search** and select and the Association Name hyperlink from the list.
- ▶ Select the applicable product and then click **Next**. Enter all necessary order information. The closing date selected will drive the available delivery options on the following page.
- ▶ Continue placing the order and processing the payment.
- ▶ The Order Confirmation page will include important information about your order, including active links to documents immediately available for printing or download to your PC.

Once the order is submitted, click on the Control Center link to return the CondoCerts home page. You are notified via email when your order is completed. Return to www.CondoCerts.com, login and click on Review Orders. Access the order to print or download the documents to your PC.

Order Confirmation

- ▶ [Detailed Receipt](#) - please print for your records
- ▶ Order #: 3057821
- ▶ Original Order Start Date: 1/28/2015
- ▶ Demand and Resale Disclosures are completed by the Managing Agent.
You will receive an email from CondoCerts when your document(s) are ready for retrieval.
 - ▶ Delivery Start Date: 1/28/2015 (date order is accepted by the Property Manager to start processing - may change if order is rejected)
- ▶ Link to ordered documents for **Bittercreek Western**
 - ▶ [Required Covenants, Codes and Regulations](#)
 - ▶ [Financial/Budget](#)
 - ▶ [Welcome Packages](#)
- ▶ To check status of your order, login to CondoCerts.com and click on *Review Orders* from your Control Center

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Retrieve an Order:

From the CondoCerts Home page select Review Orders –

Click the Project Name link to retrieve the order.

Retrieve Previous Orders						
Display:						
Project Name	File Escrow	Transaction #	Status	Product Description	Initiated Date / Paid Date	Action
Arizona Sun at Chandler 1665 W Alameda Dr Suite 101		3057772	Complete	Association Questionnaire	01/26/2015 Paid: 01/26/2015	Details

- ▶ Orders are listed in four main tabs. Within each tab, the column headers function as a sorting hyperlink. Simply click to re-sort the list.
- ▶ Completed or In Process – This tab will list all processed orders.
 - The Status column will indicate if the order is In Process or Complete.
 - Details button will provide a snapshot of the order.
 - Cancel button will provide the option to cancel the order. Review request, select a reason and then click on Confirm to cancel the order.
 - Update/Cancel button will provide options to request an update. Enter the new closing date and click Continue to process the update request.
- ▶ Locate the order and click on “Project Name” to access. Once opened, scroll down to “Order Information” to retrieve any documents or services purchased.
 - Pending documents are being processed by the Property Management Company and/or CondoCerts and are not yet available for retrieval.
- ▶ Click on Control Center at any time to return the CondoCerts home page.

Sample Order Information -

Order Information

Order Total Transaction Number 3057772

\$100.00

Documents for Arizona Sun at Chandler

[Questionnaire for Arizona Sun at Chandler](#)

Click here to view order breakdown

Additional Files

No files uploaded

Association with Standard Questionnaire link available.

Order Information

Order Total Transaction Number 3057804

\$200.00

Documents for Arizona Sun at Chandler

[Questionnaire for Arizona Sun at Chandler](#)

Lender-Specific Questionnaire - pending

Click here to view order breakdown

Additional Files

No files uploaded

Association with Standard Questionnaire link available and Lender Specific Questionnaire Pending.

Order Information

Order Total Transaction Number 3057804

\$200.00

Documents for Arizona Sun at Chandler

[Questionnaire for Arizona Sun at Chandler](#)

Click here to view order breakdown

Additional Files

File Name

- Arizona Sun at Chandler 3057804.pdf

Active link to Lender Specific Questionnaire and any other additional documents purchased.

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- ▶ **Awaiting Payment** – This tab will list all processed orders requiring payment.
 - Click on Pay Now to process a payment.
 - Once payment is processed, the order will move to the Completed or In Process tab.
 - Click on the Details button to retrieve the Authorization Code for a third party payment.

Retrieve Previous Orders						
Display: Completed or In Process (58) <input checked="" type="checkbox"/> Awaiting Payment (1) <input type="checkbox"/> Rejected (4) Archives						
Project Name	File Escrow #	Transaction #	Product Description	Current Owner	Initiated Date	Actions
Texas Sun at Houston 1665 W Alameda Dr Suite 101	1111111	3057770	Resale Demand Document (Demand Resale)	John Doe	01/26/2015	Pay Now! Details Cancel

Requestor	Property Manager
Stephanie Marks 4950 S 48thSt phoenix, AZ 85040	*TEST DawnStar HOA
Details	
Initiation Date: 1/26/2015	Paid Date: Not yet paid
Payment Method: Waiting for payment	Completion Date: 2/4/2015
Retrieved Date: 2/5/2015	Cancel Date:
Sales Price: \$120,000.00	Cancellation Fee:
Transaction #: 3057770	Cancellation Reason:
Auth Code#: JBDF185678	

- ▶ **Rejected** – This tab will list all orders returned by the Property Management Company. Click on Correct Order to view the reject reason. Make the required corrections and click on Submit to send. The Order Confirmation screen will include a new Delivery Start date.

Retrieve Previous Orders							
Display: Completed or In Process (58) <input checked="" type="checkbox"/> Awaiting Payment (1) <input checked="" type="checkbox"/> Rejected (4) Archives							
Project Name	File Escrow #	Transaction #	Completed Date	Product Description	Current Owner	Initiated Date / Paid Date	Actions
Bittercreek Western 3229 e friesse dr	123456	2914192		Resale Demand Document Standard Product (Demand Resale)	Santa Fe	06/17/2014 Paid: 06/17/2014	Details Correct Order

Order Information
Reject Reason
incorrect property address. please adjust and resubmit.

- ▶ **Archives** – This tab provides multiple search options for retrieving previous orders; for example - by month, date range or property specific information. Searches can be further refined by including optional criteria such as status category, association name or order type.

Retrieve Previous Orders	
Display: Completed or In Process (58) <input checked="" type="checkbox"/> Awaiting Payment (1) <input checked="" type="checkbox"/> Rejected (4) Archives	
Search By (select one): <input type="radio"/> By Month Month ▼ Year ▼ <input type="radio"/> By Date Range through Month ▼ Day ▼ Year ▼ <input type="radio"/> By Period [Period] ▼ <input type="radio"/> By Seller Last Name <input type="text"/> <input type="radio"/> By Escrow Number <input type="text"/> <input type="radio"/> By Street Address <input type="text"/> <input type="radio"/> By Order Number <input type="text"/>	Refine Search By (optional): Category [All Categories] ▼ Association [All Associations] ▼ Order Type [All Order Types] ▼
<input type="button" value="Clear"/> <input type="button" value="Search"/>	

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Request a Custom Lender Questionnaire:

Processing a request for a Custom Lender Questionnaire is very similar to placing an order for a Standard Questionnaire. A few additional steps are added to select the financial institution's custom form. You also have the option to upload a new form if the one you need is not listed.

Custom Lender Questionnaires are generally available 3 business days from the date ordered. The document will show as **PENDING** until completed.

From the CondoCerts home page:

- ▶ Click on Place a New Order, select the type of transaction and click Next to continue.
- ▶ Complete the search criteria and click on Search to retrieve a list of Association names.
- ▶ Select an Association to continue.
- ▶ This will bring you to the Product selection screen. When Questionnaire is selected, a Lender Specific selection screen will appear.
 - Select **Yes** for Lender Specific Questionnaire to activate the drop down menus.
 - From the list, select the required form.
 - If the form needed is not included, select 'My Form Is Missing' and instructions will be provided to upload the Custom Lender Questionnaire.
 - Click Next to continue.
- ▶ Enter all necessary Order Information.
- ▶ Continue placing the order and processing the payment.
- ▶ The Order Confirmation page will include important information about your order, including active links to documents immediately available for printing or download to your PC.

Order Confirmation

- ▶ [Detailed Receipt](#) - please print for your records
- ▶ Order # 3057805
- ▶ Original Order Start Date: 1/27/2015
- ▶ [Link to Questionnaire for Bittercreek Western](#)
You have also requested a Custom Lender Form. It will be delivered electronically via email within 3 business days.
- ▶ To check status of your order, login to [CondoCerts.com](#) and click on [Review Orders](#) from your Control Center

Attach additional files to an order:

You have the option to attach additional files to an existing order. For example, if a custom questionnaire is not selected at the time the order is placed, you can access to the order through Review Orders to upload the file at a later time.

From Review Orders-

- Locate and open the order.
- Scroll down to view additional sections:
 - Upload a Custom Questionnaire Form.
 - Attach Additional Files.
- Once the file is uploaded, the order information will update.

Upload a Custom Questionnaire Form

Upload Lender Specific Form OR Upload an existing Custom Form

Choose File No file chosen Please select a custom form

Submit Lender Form
Submit Custom Form

Attach Additional Files

Choose File No file chosen Attach File

I acknowledge that the file(s) attached are being provided directly to the requestor on behalf of the community manager and CondoCerts.com is not responsible for the file content or quality.

No management files uploaded No requestor files uploaded

Remove Checked Files

Arizona Sun at Chandler

✓ Your form has been successfully uploaded to CondoCerts. Please allow 2 business days for your order to be completed.

Order Information

Order Total	\$315.00	Transaction Number	8132047
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Documents for Arizona Sun at Chandler

[Questionnaire for Arizona Sun at Chandler](#)

Lender-Specific Questionnaire - pending

[Click here to view order breakdown](#)

Attach Additional Files

✓ The file "Sample.jpg" was uploaded successfully. (4/20/2015 4:39:07 PM)

Choose File No file chosen Attach File

I acknowledge that the file(s) attached are being provided directly to the requestor on behalf of the community manager and CondoCerts.com is not responsible for the file content or quality.

No management files uploaded

Requestor Uploaded Files

File Name	Uploaded	Remove?
Sample.jpg	04/20/2015	<input type="checkbox"/>

Remove Checked Files

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Third Party Payments

CondoCerts provides the option to place an order and select payment by a third party. The third party has easy access to sign in and process their payment. Once the order is paid for it, it will be submitted for normal processing.

At the **Order Summary** Screen –

- ▶ Choose the payment method of Third Party.
- ▶ Review and Check the required disclosure.
- ▶ Screen print or document the order Reference Code and provide to the individual making the payment.
- ▶ Click on Place Order

Order Summary

Ordered Items	\$130.00	Edit Items Ordered
Rush Fee	\$0.00	Add/Remove Rush Fee
Shipping	\$0.00	Edit Shipping Method/Address
Due Now	\$130.00	
Due at Close of Escrow	\$0.00	

Choose payment method: Third Party Payment

I understand my order will not be processed until payment is received by CondoCerts.com.
 After completing the order process, another individual can pay for this order by clicking on the **Pay Now!** button found on the CondoCerts homepage and entering the reference code below.

Reference code **ZVFWA73102** must be entered to process payment successfully.

[<< Previous](#) [Place Order](#)

Note: The Reference Code is listed in Order Details. Locate the order in Review Orders and click on the Details button to view information.

Arizona Sun at Chandler 1865 W Alameda Dr Suite 101	1111111	3057833	In Process	Resale Demand Document (Demand Resale)	01/28/2015	Details	Cancel
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Requestor	Property Manager
Stephanie Marks 4950 S 48thSt Phoenix, AZ 85040	*Test IT Group PMC
Details	
Initiation Date: 1/28/2015	Paid Date:
Payment Method: No Payment Method	Completion Date:
Retrieved Date:	Cancel Date:
Sales Price: \$120,000.00	Cancellation Fee:
Transaction #: 3057833	Cancellation Reason:
Auth Code#: ZVFWA73102	

Once the order is placed, another individual will go to CondoCerts.com and click on the Pay Now button to process the payment. Enter the Reference Code provided and click on Submit.

CondoCerts
A Mutual of Omaha Bank Company

Existing Users

User ID:

Password:

Forgot your Username? / [Use ID?](#)

Remember me?

[Login](#)

New Users

[Pay Pending Order](#) [Pay Now](#)

Payment By Authorization Code

Please enter your authorization code in the space provided below, then click the submit button.

[Submit](#)

Eliminate Expenses & Boost Productivity
Transform the manual process of HOA paperwork required in every real estate transaction.

Mutual of Omaha Bank
Member FDIC. Equal Housing Lender

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Modify an Order:

Modify an Existing order allows you add a Rush Delivery option, add a custom lender form, and/or add the option to receive a hard copy or CD of the order. Modify options will vary based on what is available for the order selected.

From the CondoCerts Home page select *Modify an Existing Order* -

- ▶ Enter the Order number or Escrow number and click on Submit; OR select an order from the list.
- ▶ Questionnaire Available - Select a Custom Lender form if desired and/or click Next to bypass this option to continue.
- ▶ Select a delivery option for Hard Copy or CD. Click Next to continue and provide shipping information.
- ▶ Review the updated order summary and enter payment information. Click on Place Order
- ▶ Review your updated order confirmation and available links.
- ▶ Once completed, click on Control Center link to return the CondoCerts home page.

For additional help or assistance, contact CondoCerts Customer Service at 1.800.310.6552 or email CondoCerts at info@condocerts.com.

Frequently Asked Questions...

How can I be sure the information received on the Questionnaire Letter is current?

All Questionnaire Letters include the date of the most recent update. Additionally, when placing an order on the *CondoCerts* website, the purchaser can view when the last project update was posted. Property Managers and Homeowners Associations are required to update project information. If for some reason a project is not updated and expires, dynamic documents and products for that Association will show as *Pending* until updated. Once the Association is updated by the Project Management Company, the Association documents and questionnaires become immediately available for view.

Are Property Managers and Homeowner Associations notified of a project requiring updates?

Email notifications are sent by *CondoCerts* to all Property Management Companies for each project approaching an expiration date. *CondoCerts* automatically recognizes when a project is approaching an expiration date and will send email notifications 30, 15, 7 and 3 days prior to the expiration date. Recognizing the critical need for accurate and reliable information, if a project becomes expired, dynamic documents or products for that association will show as *Pending* when ordered. Once the project is updated by the Property Management Company, it immediately becomes active and available for view.

Is credit card or checking information confidential and protected?

CondoCerts takes your privacy and security very seriously. Payments can be made safely and securely on line with a credit card, electronic check or ACH payment. Individual credit card, electronic check or ACH information is not stored on the *CondoCerts* payment system.

What is the cost of obtaining a Questionnaire Letter?

Each Property Management Company or Homeowner Association determines the final price for the services provided. The Property Management Companies have a critical and essential role in maintaining current and accurate database information. As the Property Manager, they fully understand what fees are reasonable for their associations. The cost of a typical Standard Questionnaire Letter will vary. This cost will increase for a Custom Lender Questionnaire. Additionally, the cost of constituent documents will also vary from project to project.

For additional help or assistance, contact CondoCerts Customer Service at 1.800.310.6552 or email CondoCerts at info@condocerts.com.