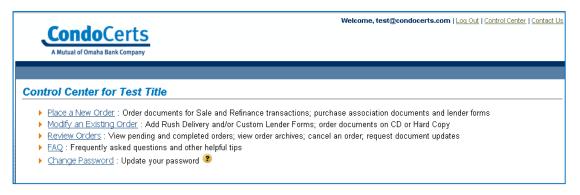


Login to CondoCerts -

To submit a request with *CondoCerts*, log on to <u>www.condocerts.com</u>.

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.



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

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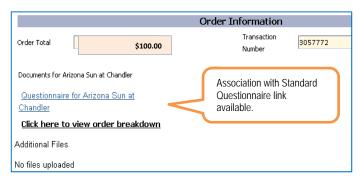
Retrieve an Order:

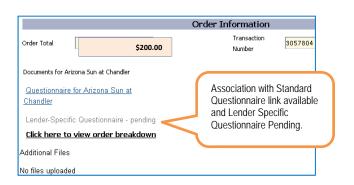
From the CondoCerts Home page select Review Orders -

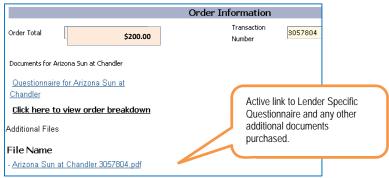


- Orders are listed in four main tabs. Within each tab, the column headers function as a sorting hyperlink. Simply click to re-sort the list.
- Completed or In Process This tab will list all processed orders.
 - o The Status column will indicate if the order is In Process or Complete.
 - Details button 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 -









- ▶ <u>Awaiting Payment</u> This tab will list all processed orders requiring payment.
 - Click on Pay Now to process a payment.
 - o 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.



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.



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.





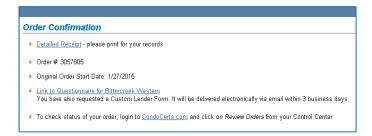
Request a Custom Lender Questionnaire:

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.
 - o 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.

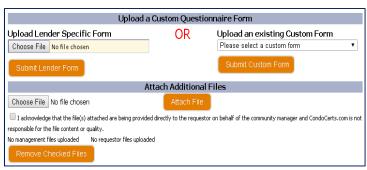


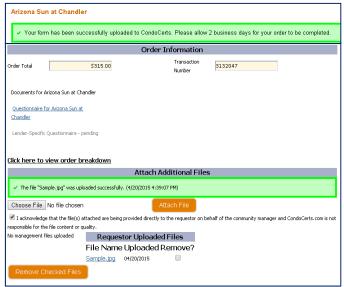
Attach additional files to an order:

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.





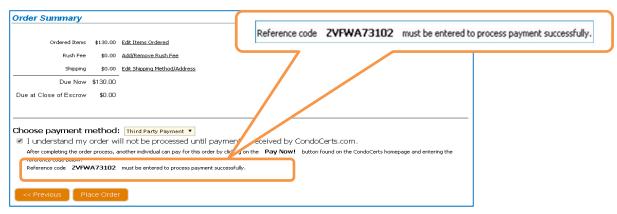


Third Party Payments

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



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



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.





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.