



الاتحاد العقارية
Union Properties
Since 1987

UP Broker Portal User Manual

User Guide v1.3

2026



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1. Signing up to the Broker Portal

The sign-up process allows brokers to create a secure account by entering their email addresses, username, and password. Once registration is complete, the system automatically generates a corresponding contact record in the CRM (refer to the CRM user manual). This synchronization ensures brokers gain portal access while the organization can easily manage real-time data.

The signing up process is composed of the following steps:

1. Sign up to the Broker's Portal.
2. Register a new contact and create a new broker profile.

The sign-up process allows brokers to create a secure account by entering their email addresses, username, and password. Once registration is complete, the system automatically generates a corresponding contact record in the CRM (refer to the CRM user manual). This synchronization ensures brokers gain portal access while the organization can easily manage real-time data.

1.1 Sign up to Broker's Portal

To sign up to the Broker Portal, proceed as follows:

1. Access the portal URL provided by your organization.
2. On the Broker portal home page, click Agent Registration.

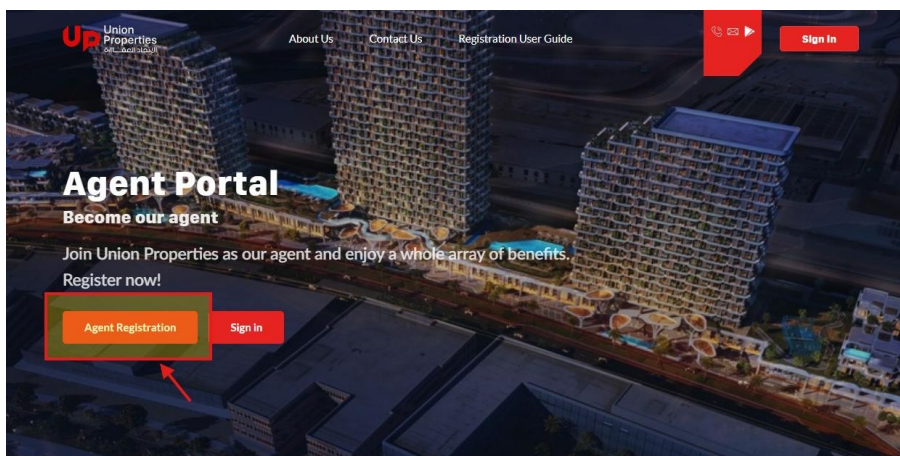


Figure 1 Broker Portal Landing Page – Agent Registration



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3. On the Register page,
 - a. Provide a valid Email address.

Register

Email

User Name

Password

Confirm password

Register

Already Registered ? [Sign In](#) Or [Redeem Invitation](#)

IMPORTANT NOTES

- If the email is already registered, the system will prompt you to use a different one.

- a. Create a User Name.
 - b. Enter a secure Password and rewrite to Confirm Password.
4. Click Register.

Email

User Name

Password

Confirm password

Register

Already Registered ? [Sign In](#) Or [Redeem Invitation](#)

Figure 2 Complete Registration



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Once the broker successfully signs up and registered, a synchronization takes place between the Broker portal and the CRM system as follows (see CRM User Manual):

- A new contact record is automatically generated in the CRM.
- The broker's email, username, and registration details are logged into the CRM.

The coming section explains the steps of creating a profile for the newly registered broker.

1.2 Register a New Broker Profile

Registering a new broker profile in the Broker Portal requires the following:

- Filling in personal and organizational details
- Assigning the correct role
- Updating the profile

Once the profile is updated, the system automatically creates corresponding records in the CRM and maps the profile details into the relevant sections.

To register a new broker profile, proceed as follows:

1. On the Broker Portal, sign in using your credentials. (See [Sign up to Broker's Portal](#) section.)
2. Click Profile.

The screenshot shows the 'Profile' page in the Broker Portal. On the left sidebar, the 'Profile' button is highlighted. The main content area has a heading 'Please complete the information below to proceed with your partner registration'. Below this is a section titled 'Your Information' with the following fields:

| | |
|---|--|
| First Name * | Last Name * |
| <input type="text" value="Sara"/> | <input type="text" value="Ali Test"/> |
| E-mail | Work Mobile |
| <input type="text" value="support@propertywatch.ae"/> | <input type="text" value="+971555475500"/> |
| Organization Name * | Title |

Figure 3 Accessing Profile Page

3. Fill in the following fields:
 - a. First Name and Last Name
 - b. E-mail
 - c. Work Mobile
 - d. Organization Name
 - e. Title



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4. Click Update.

Please complete the information below to proceed with your partner registration

Your Information

| | |
|--|---|
| First Name * | Last Name * |
| <input type="text" value="Sara"/> | <input type="text" value="Ali Test"/> |
| E-mail | Work Mobile |
| <input type="text" value="support@propertwatch.ae"/> | <input type="text" value="+971555475500"/> |
| Organization Name * | Title |
| <input type="text" value="Sara Broker LLC"/> | <input type="text" value="Broker Manager"/> |
| Nickname | Web Site |
| <input type="text"/> | <input type="text"/> |
| Public Profile Copy | |
| <input type="text"/> | |
| WhatsApp No. | <input type="text" value="+971555475500"/> |

Figure 4 Updating Profile

The profile information is saved and the Register to be a Partner option becomes visible in the portal.

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About Us Contact Us

SARA ALI TEST

Home > Profile

Profile

Up
Sara Ali Test

Profile

Register to be a partner

My documents

Change your password

Your Information

| | |
|---|--|
| First Name * | Last Name * |
| <input type="text" value="Sara"/> | <input type="text" value="Ali Test"/> |
| E-mail | Work Mobile |
| <input type="text" value="support@propertywatch.ae"/> | <input type="text" value="+971555475500"/> |
| Organization Name * | Title |
| <input type="text"/> | <input type="text"/> |

Your profile has been updated successfully.

Figure 5 Profile Registered

The added details have been mapped to the contact's record in the CRM. The next step is to register the new contact to be a partner.



1.3 Register New Contact to be a Partner

Once a broker's profile has been created and updated in the Broker Portal, the next step is to register the broker as a partner through the portal. During this process, the user enters the following details:

- Company and Contacts Details
- Authorized Person Details
- Banking Details and Documents

As mentioned before, information provided during registration is automatically mapped into the CRM. To register the broker as a partner, proceed as follows:

1. On the Broker Portal, sign in using your credentials. (See [Sign up to Broker's Portal](#) section.)
2. On the left navigation, click Register to be a Partner.

The screenshot shows a web interface for a user named Sara All Test. A green notification bar at the top states "Your profile has been updated successfully." Below this is a "Your Information" form with the following fields:

| | |
|------------------------|----------------|
| First Name* | Last Name* |
| Sara | All Test |
| E-mail | Work Mobile |
| support@proptvwatch.ae | +971555475500 |
| Organization Name* | Title |
| Sara Broker LLC | Broker Manager |

The left navigation menu includes "Profile", "Register to be a partner" (highlighted), "My documents", and "Change your password".

Figure 6 Register a Contact to be a Partner

The Company and Contacts Details page is displayed to add the required information.

1.3.1 Add Contact Details

1. Fill in the following details:
 - a. Company Name
 - b. Trade License No.
 - c. Trade License Expiry
 - d. Website, if available
 - e. Number of Employees
 - f. Tax Registration Number
 - g. RERA Number
 - h. RERA Number EXP. Date

IMPORTANT NOTES

- The expiry date must be after today's date.
- If an invalid date is entered, an error will appear when proceeding.
- One month prior to expiry, the CRM automatically sends a notification to the CRM manager.



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2. Click Next.

| | |
|-------------------------------|--------------------------|
| Account Name* | Company Type* |
| Sara Broker LLC | Local(UAE) |
| Trade License No.* | Trade License Expiry* |
| TL123456 | 06/02/2026 |
| Country | City |
| United Arab Of Emirates | Dubai |
| Website | Number of Employees |
| | |
| Office Registration No. - ORN | Tax Registration Number |
| | 345678 |
| Target Market | |
| | |
| RERA Number* | RERA Number Expiry Date* |
| RN567890 | DD/MM/YYYY |
| Application Status* | |
| Active | |
| Next > | |

Figure 7 Register a Contact as a Partner

The next step in the broker registration process is to add details of the Authorized Person (AP). This ensures that the broker account is linked to a verified representative, whose information is also mapped into the CRM for compliance and tracking.

1.3.2. Add Authorized Person Details

1. Fill in the following information about the authorized person:
 - a. AP Full Name – The authorized person’s complete name.
 - b. AP Designation – The role or position (e.g., Manager, Director).
 - c. AP Passport No. – The authorized person’s passport number.
 - d. AP Passport Expiry Date
 - e. Validation Rule: The date must be valid and not expired.
 - f. AP Mobile Number – Enter the authorized person’s contact number.
 - g. Point of Contact (POC) Full Name – Already filled in with the contact’s name.
 - h. POC Designation – Designated point of contact for the account.
 - i. POC Passport Number – Designated point of contact passport number.
 - j. POC Passport Expiry date – Designated point of contact passport expiration date.
 - k. POC Mobile Number
 - l. POC Email Address



2. Click Next.

| | | | |
|---------------------|----------------------------|--------------------------|--------------------------|
| AP Full Name * | Sharan | AP Designation | Broker Manager |
| AP Passport No. | TN89563 | AP Passport Expiry date | 07/02/2026 |
| AP Mobile No. * | Provide a telephone number | AP Email Address * | |
| <hr/> | | | |
| POC Full Name * | Sara Ali Test | POC Designation | |
| POC Passport Number | | POC Passport Expiry date | DD/MM/YYYY |
| POC Mobile No. * | Provide a telephone number | POC Email Address * | support@propertywatch.ae |
| Previous | Next > | | |

Figure 8 Adding Authorized Person Details

The details have been added and the next step is to add the Company and Contact Details.

1. On the Company Contact Details, fill in the following:

- a. Main Phone
- b. Landline number
- c. Email Address of the company
- d. Complete Address of the company
- e. Postal Code



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2. Click Next.

The screenshot shows a form for adding company and contact details. The fields are as follows:

- Main Phone ***: +971456975595
- Landline**: Provide a telephone number
- Email ***: info@sara.ae
- Complete Address ***:
 - Address1**: (empty)
 - Address Line 2**: (empty)
 - Address 2**: (empty)
 - ZIP/Postal Code**: 1134569
 - Country**: United Arab Of Emirates
 - City**: Dubai

At the bottom, there are two buttons: "Previous" and "Next >".

Figure 9 Adding Company and Contact Details

The details have been added and the next step is to add banking details and upload documents.

1.3.3. Add Banking Details and Upload Documents

The system requires entry of banking information and the upload of mandatory documents. To add banking details and upload documents, proceed as follows:

1. On Bank details page, fill in the following:
 - a. Bank Account Name
 - b. Bank Account Number
 - c. IBAN Number – If applicable.
 - d. SWIFT Code
 - e. Bank Account Currency
 - f. Bank Name
 - g. Bank Country
 - h. Bank City
 - i. Bank Branch
 - j. Bank PO Box
 - k. Bank Address



2. Click Next.

| | | | |
|-----------------------|----------------------|---------------------|-------------------|
| Bank Account Name | Sara Ali Test | Bank Account Number | 15698742695565595 |
| IBAN No. | AE12345678902345789 | Bank Swift Code | AD123456 |
| Bank Account Currency | AED | Bank Name | |
| Bank Country | United Arab Emirates | Bank City | Dubai |
| Bank Branch | Deira | Bank PO Box | 75954 |
| Bank Address | Dubai | | |

Figure 10 Add Banking Details

The details have been added and the Upload Documents page opens to start uploading the required documents. The following section explains the steps of uploading the necessary documents.

1.3.4. Upload Documents

After adding the bank account details, users are directed to the Upload Documents page to submit all required files as part of the partner registration process. Once uploaded, these documents are seamlessly mapped into the CRM system for future reference and operational use.

To upload documents, proceed as follows:

1. On the Upload Documents page, click the <File Name> to be uploaded. For example, click Trade License.

Partner Registration Step 5 of 5

Basic Information Company Personnel

Company & Contact Details Bank Details

Upload Documents

| Name ↑ | Modified |
|--|-----------------|
| 1. Trade License | .10 minutes ago |
| 2. RERA Certificate | .10 minutes ago |
| 3. Owner's Authorized Signatory Passport Copy | .10 minutes ago |
| 4. Owner's Authorized Signatory Visa Copy + Visa | .10 minutes ago |

Figure 11 Uploading Documents - Trade License



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2. Click Add Files, and choose the file from your device.
3. Repeat the process for all required files.
4. Once all files are uploaded, click Submit.

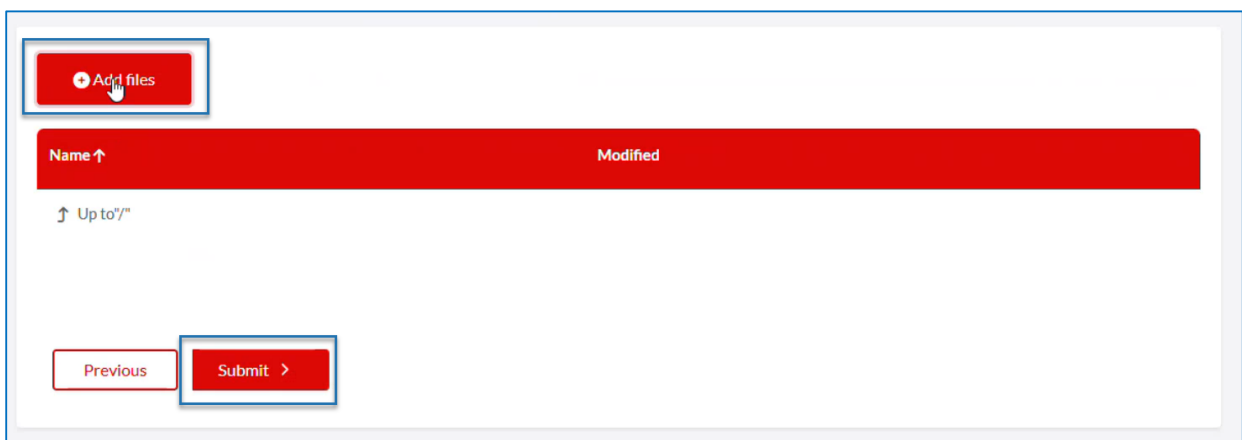


Figure 12 Adding and Submitting Files

The file has been added and you can repeat the steps to upload more files.

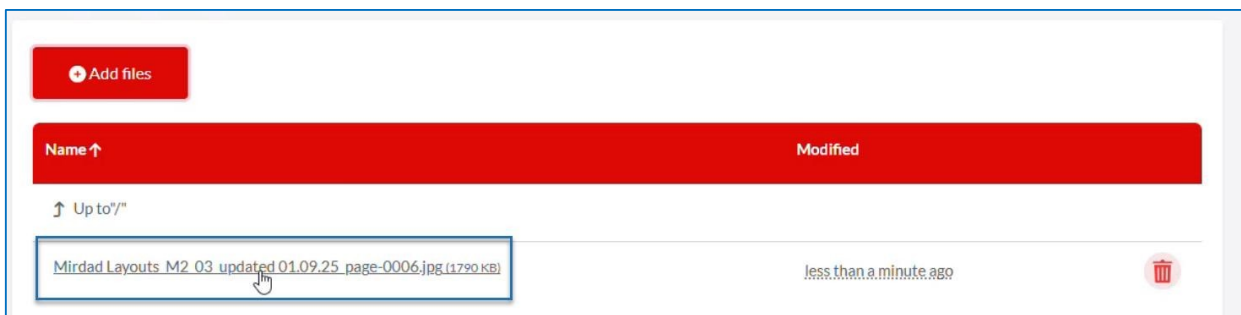


Figure 13 File Uploaded

5. Repeat the same steps to upload all files then, on the Upload Documents page, click Submit.

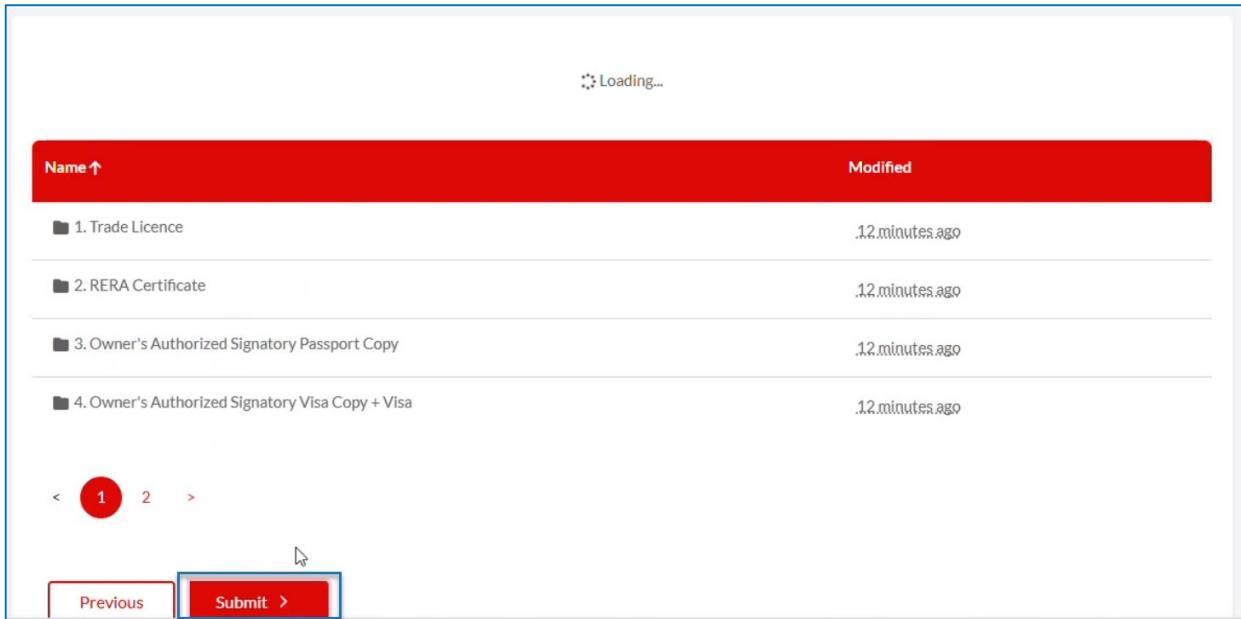


Figure 14 Submit Uploaded Documents

1. IMPORTANT NOTE

- All mandatory files must be uploaded before submission.

After clicking Submit:

- The system processes the uploaded files.
- The details entered during the Register to be a Partner stage are automatically mapped into the CRM.



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2. Dashboard Access

Once the broker completes the Register to be a Partner process and the marketing agreement is activated, access to the Broker Portal dashboard is automatically enabled.

- Upon activation, a welcome email is sent to the broker's registered email address confirming successful access.
- Until these conditions are met, the dashboard remains inaccessible and an Access Denied message is displayed.

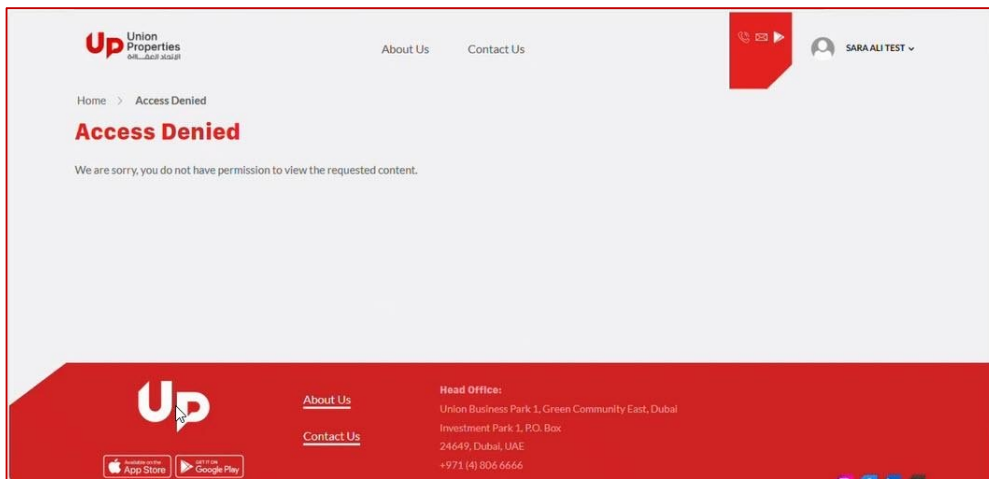


Figure 15 Access Denied Message

After access is enabled, the dashboard displays the following sections:

- Cases
- Settings

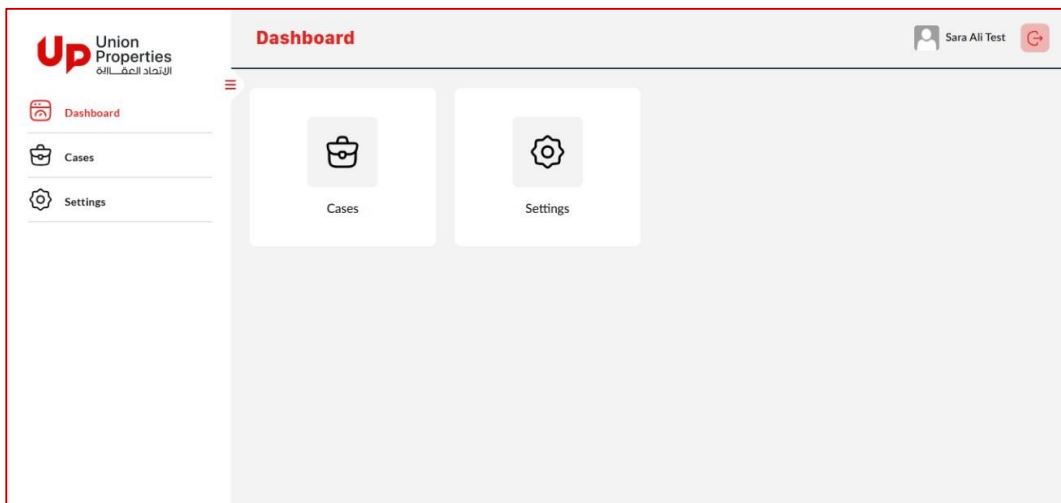


Figure 16 Broker Portal Dashboard View



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3.Support and Case Management

The Cases section enables brokers to submit, track, and follow up on support requests through an integrated case management workflow.

All cases submitted through the Broker Portal are handled by the support team, and their statuses are synchronized back to the portal for broker visibility.

3.1 Create a Case

Brokers can create support requests directly from the Broker Portal dashboard. To create a case, proceed as follows:

1. From the dashboard, click Cases.
2. Click Create New Case.

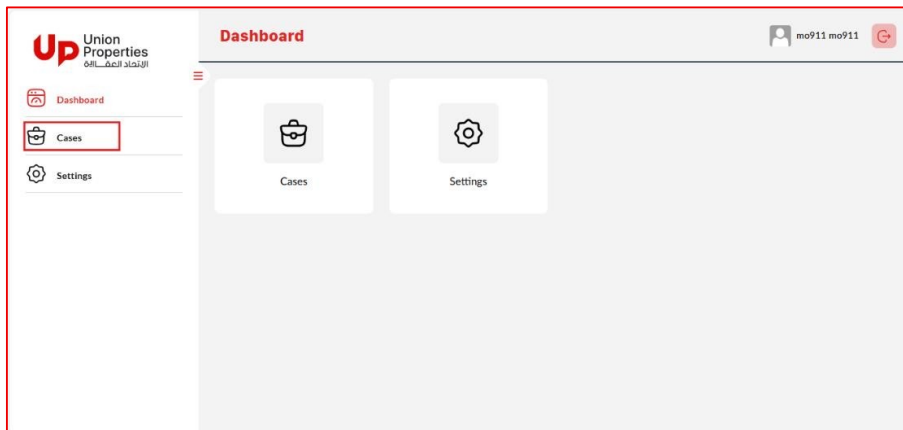


Figure 17 Accessing Cases from Dashboard

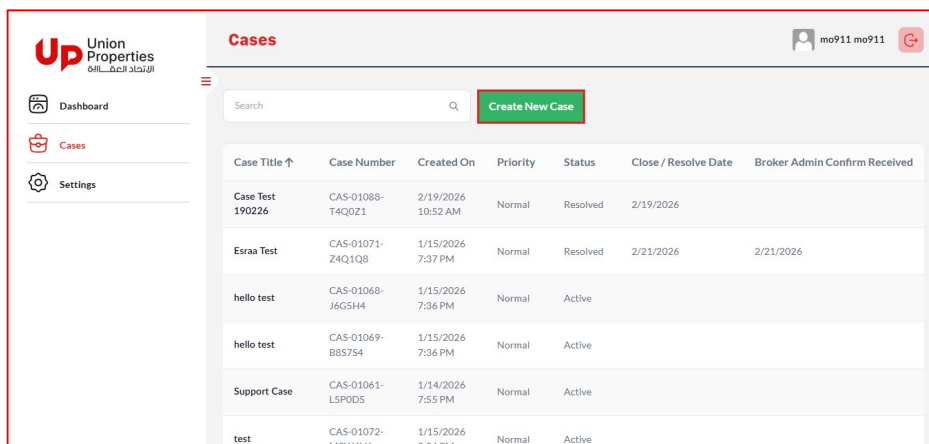


Figure 18 Creating a New Case



3. In the Create New Case page, complete the following fields:

- Case Title: Enter a brief title describing the request (for example: Support Request)
- Case Type: From the Lookup Records dialog, select the required case type from available predefined support categories and click Select. (See [Figure 19](#))
- Description: Enter details of the request or issue.

4. Click Submit.

Figure 19 Case Details Form

Figure 20 Case Type Selection Dialog

After submission:

- The case is created with the following defaults:
 - Priority: Normal
 - Status: Active
 - Creation Date: Current date
- The case becomes visible in the broker's Cases list.



The screenshot shows the 'Cases' section of the Union Properties Broker Portal. The interface includes a sidebar with 'Dashboard', 'Cases', and 'Settings' options. The main content area features a search bar, a 'Create New Case' button, and a table of cases. The table has columns for Case Title, Case Number, Created On, Priority, Status, Close / Resolve Date, and Broker Admin Confirm Received. A red box highlights the first row of the table, which represents a newly created case.

| Case Title | Case Number | Created On | Priority | Status ↑ | Close / Resolve Date | Broker Admin Confirm Received |
|--------------|------------------|-------------------|----------|----------|----------------------|-------------------------------|
| Support Case | CAS-01061-L5P0D5 | 1/14/2026 7:55 PM | Normal | Active | | |
| hello test | CAS-01068-J6G5H4 | 1/15/2026 7:36 PM | Normal | Active | | |
| hello test | CAS-01069-B8S7S4 | 1/15/2026 7:36 PM | Normal | Active | | |

Figure 21 Newly Created Case in Broker Portal

3.2 View Case Status

Brokers can track the status of all submitted cases directly from the Cases section.

Available case statuses include:

- Active – submitted and under review
- Resolved – solution or information provided
- Cancelled – case closed without resolution

When a case is resolved or cancelled by the support team, the updated status is automatically reflected in the Broker Portal. (See Figure 9)

From the Cases section, brokers can:

- View all submitted cases
- Track case status
- Review creation dates and priorities

The figure below displays all support cases submitted by the broker, including the case number, status, priority, and creation date.

This screenshot is identical to Figure 21, showing the 'Cases' section of the Union Properties Broker Portal. It displays a table of cases with columns for Case Title, Case Number, Created On, Priority, Status, Close / Resolve Date, and Broker Admin Confirm Received. The first row is highlighted with a red box.

| Case Title | Case Number | Created On | Priority | Status ↑ | Close / Resolve Date | Broker Admin Confirm Received |
|--------------|------------------|-------------------|----------|----------|----------------------|-------------------------------|
| Support Case | CAS-01061-L5P0D5 | 1/14/2026 7:55 PM | Normal | Active | | |
| hello test | CAS-01068-J6G5H4 | 1/15/2026 7:36 PM | Normal | Active | | |
| hello test | CAS-01069-B8S7S4 | 1/15/2026 7:36 PM | Normal | Active | | |

Figure 22 Tracking Case Status



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| Case Title | Case Number | Created On | Priority | Status ↓ | Close / Resolve Date | Broker Admin Confirm Received |
|------------------|------------------|--------------------|----------|----------|----------------------|-------------------------------|
| Case Test 190226 | CAS-01088-T4QZ1 | 2/19/2026 10:52 AM | Normal | Resolved | 2/19/2026 | |
| Esraa Test | CAS-01071-Z4Q1Q8 | 1/15/2026 7:37 PM | Normal | Resolved | 2/21/2026 | 2/21/2026 |
| Support Case | CAS-01061-L5P0D5 | 1/14/2026 7:55 PM | Normal | Active | | |

Figure 23 Case Status Updated

3.3 Submit a Case via Contact Us (Pre-Access Support)

Brokers can use the Contact Us feature to submit support requests before dashboard access is granted.

To submit a Case request through Contact Us, proceed as follows:

1. From the Broker Portal header, click Contact Us.

Home > Profile

Profile

Sara Ali Test

Profile

Register to be a partner

My documents

Change your password

Your Information

First Name * Sara

Last Name * Ali Test

E-mail support@propertywatch.ae

Work Mobile +971555475500

Organization Name * Sara Broker LLC

Title Broker Manager

Figure 24 Contact Us Option Before Dashboard Access

The Contact Us page opens to enable contacting Union Property before getting the Dashboard access.



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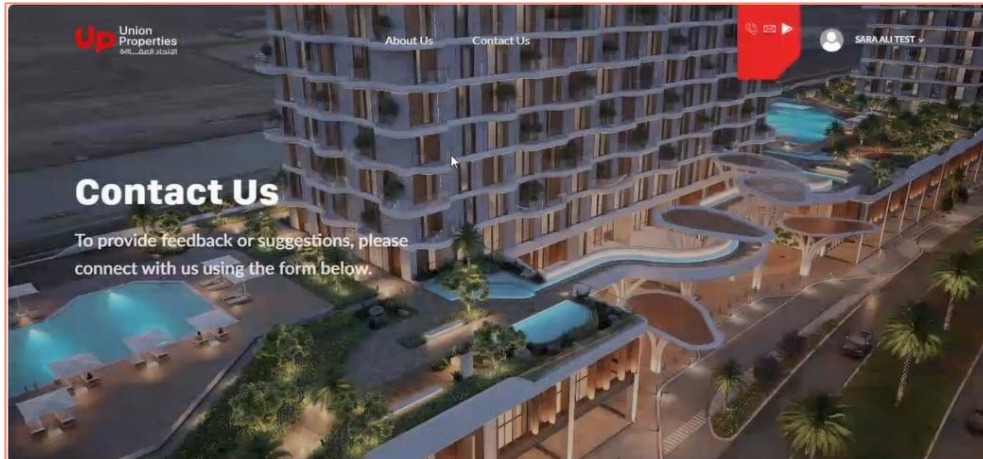


Figure 25 Contact Us Page

2. In the Contact Us form, enter the following information:

- Case Title (for example: Registration Support)
- Description (details of the issue or request)

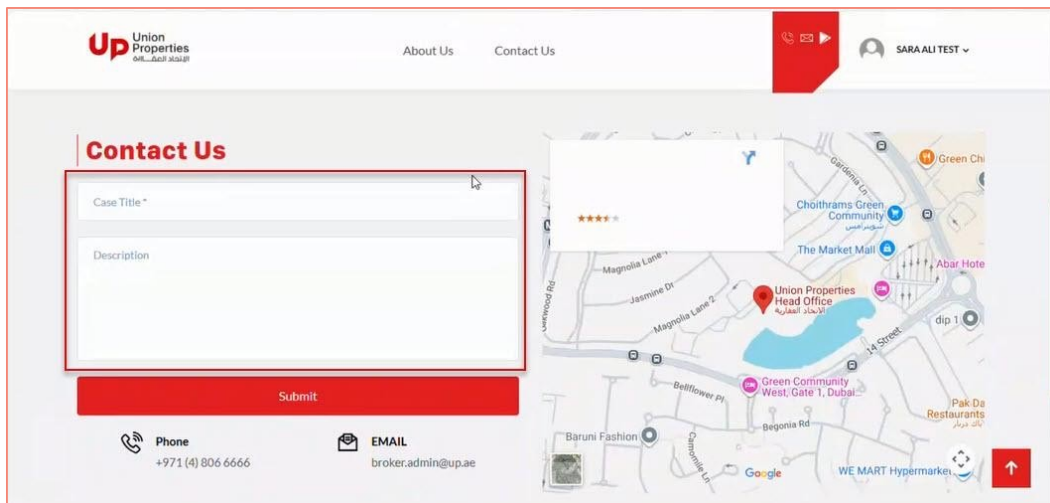


Figure 26 Submitting a Case via Contact Us

3. Click Submit.

After submission:

- A confirmation message is displayed.
- The request is successfully sent.
- The case Follows the same case workflow used for dashboard cases.



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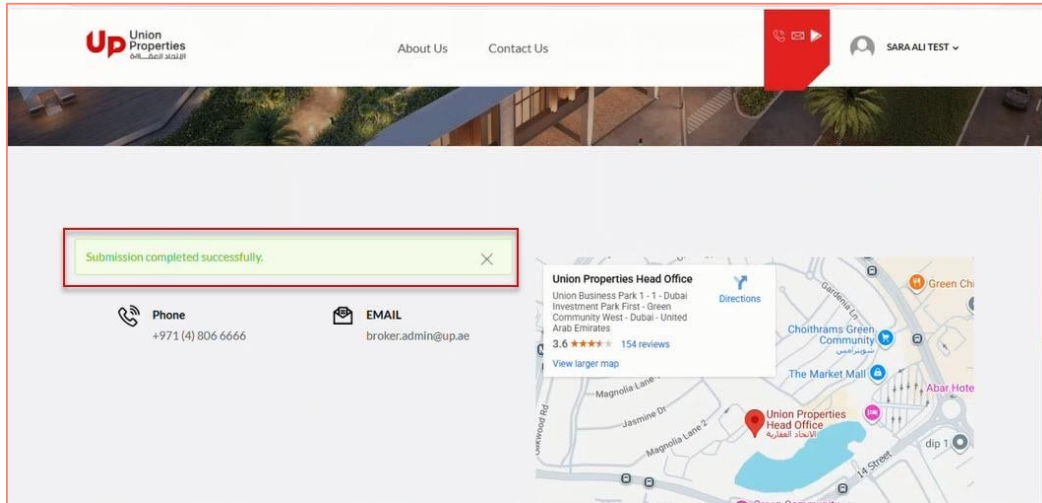


Figure 27 Confirmation Message After Submission

IMPORTANT NOTE

After dashboard access is granted, brokers should submit all support requests through the Cases section in the dashboard, instead of using the Contact Us option.

4. Profile Settings

The Settings section allows brokers to manage their profile information and preferences.

1. From the left navigation menu, click Settings.
The Settings page opens displaying the Summary and Details tabs.

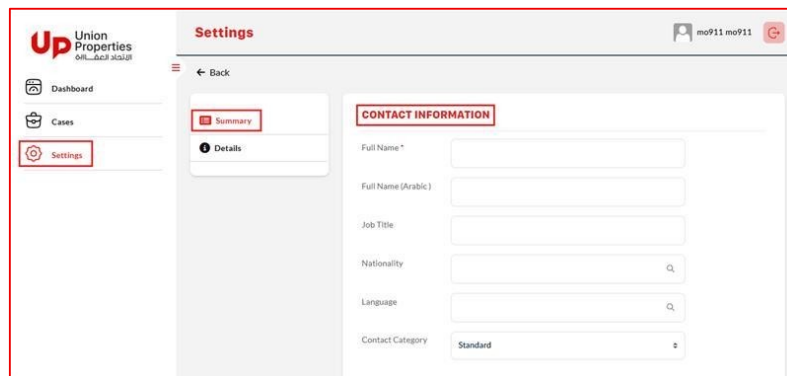


Figure 28 Settings – Summary Tab (Contact Information)

2. From the Summary tab, brokers can view and update the following information:
 - Contact information such as mobile number and email.
 - Emirates ID or passport information.



- Personal identification details.

Figure 29 Settings – Summary Tab (Personal Details)

3. The following fields are view-only and cannot be edited:

- Name
- Organization name

Figure 30 Settings Page – Summary Tab (Identify Details)

4. To update additional profile information, click the Details tab. See [Figure 31](#).

5. From the Details tab, brokers can configure contact preferences, including:

- Preferred Personal Information
- Contact preferences

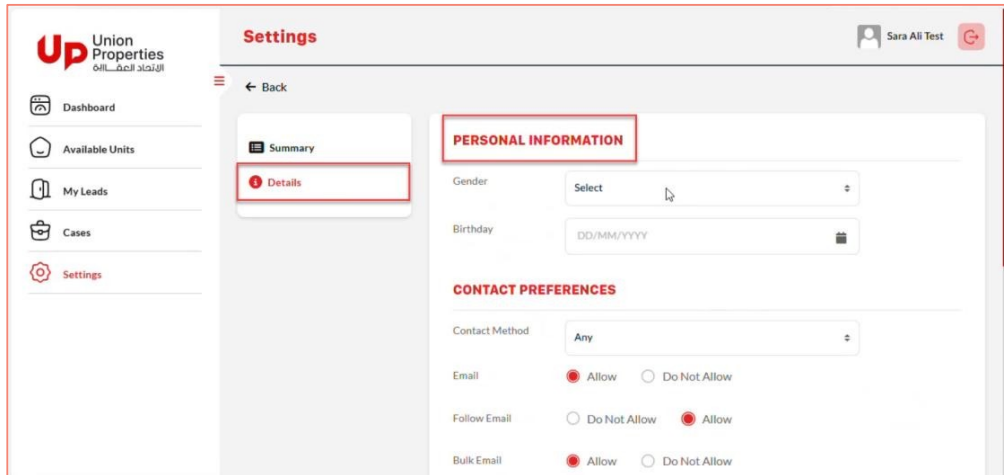


Figure 31 Settings Page – Details Tab (Personal Information)

6. Under the PERSONAL INFORMATION section, select the following:

- Gender
- Birthday date

7. Under the CONTACT PREFERENCES section, define the preferred contact method.

- Click the Allow button next to each method to allow communication using this method.

8. After updating the editable fields, click Submit.

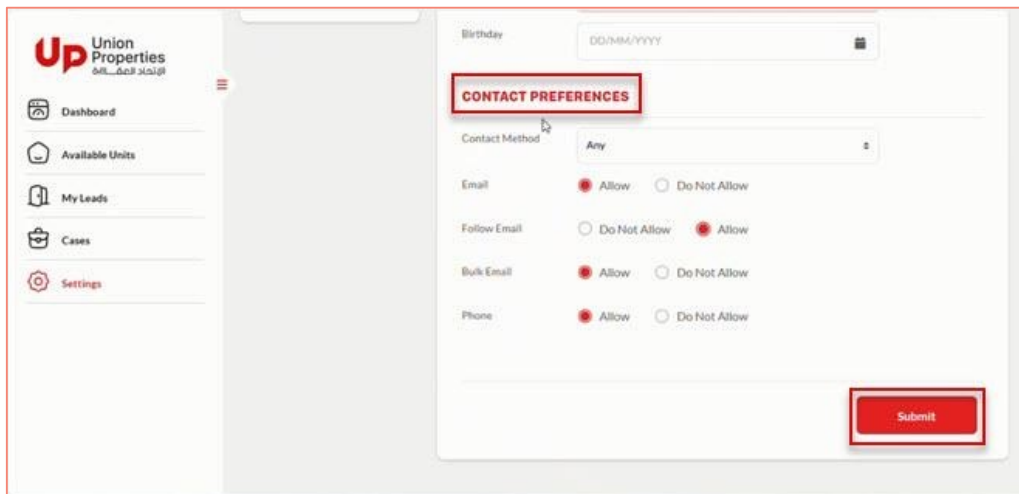


Figure 32 Settings Page – Details Tab (Contact Preferences)

A confirmation message is displayed indicating that the profile information has been updated successfully.



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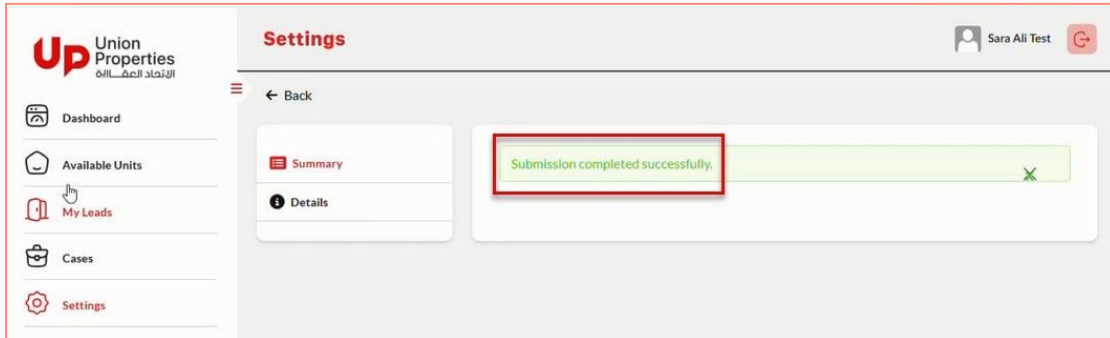


Figure 33 Profile Update Confirmation Message

5. Document Management

After registration and activation, brokers can access their uploaded documents through the My Documents section.

IMPORTANT NOTE:

The My Documents section is view-only and does not support editing or deletion. Any document update must be performed by returning to the Register to be a Partner process.

5.1 View a Document

Brokers can view previously uploaded documents from the left navigation menu.

To view an uploaded document, proceed as follows:

1. From the left navigation menu, click My Documents.

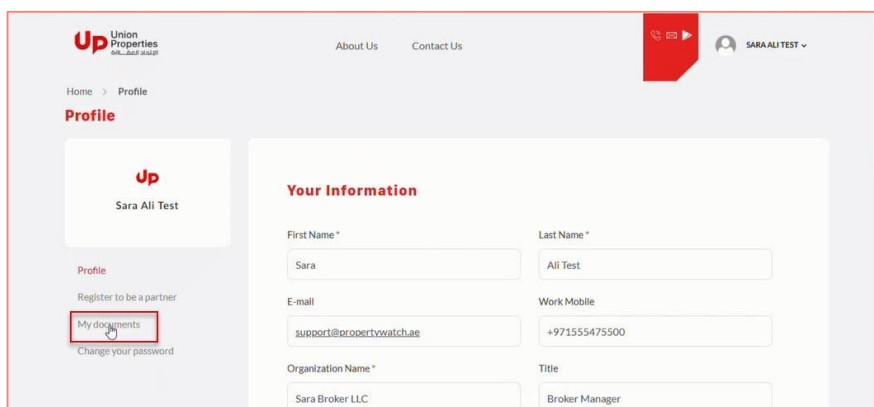


Figure 34 Accessing My Documents

2. The My Documents page opens, displaying a list of all uploaded files.



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3. Review the list, which includes:

- Document name
- Last modified date

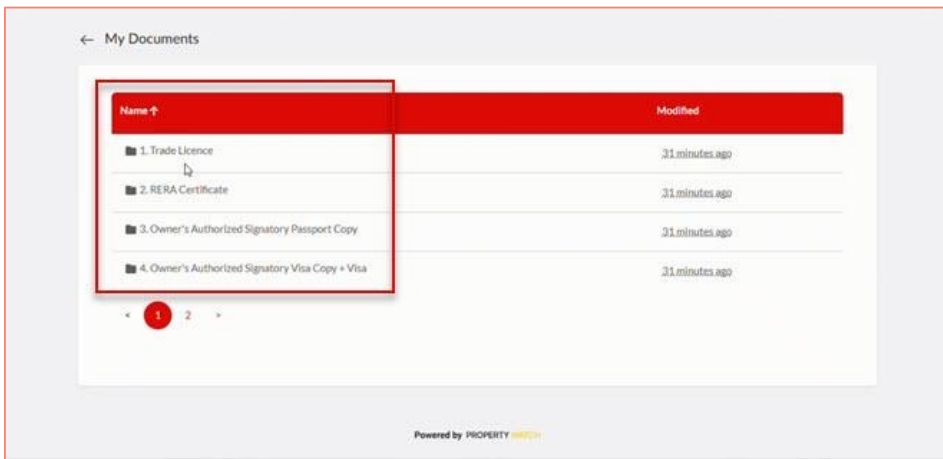


Figure 35 List of Uploaded Documents

4. Click the document name to open or download it.

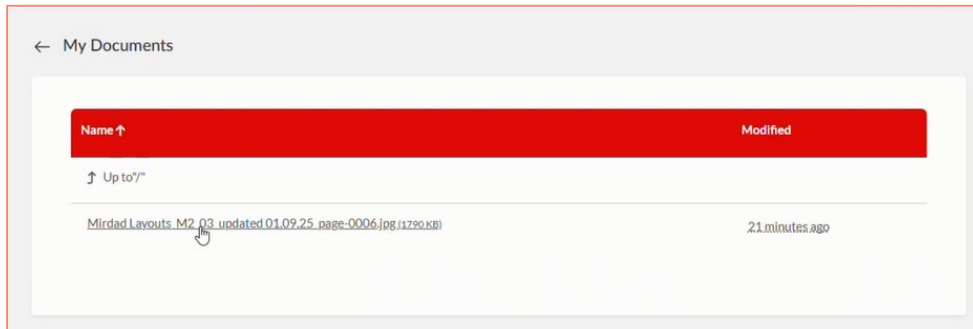


Figure 36 Clicking Document for Download and View



5.2 Update a Document

Updating an existing document requires returning to the Register to be a Partner option.

To update an existing document, proceed as follows:

1. From the left navigation menu, click Register to be a Partner.

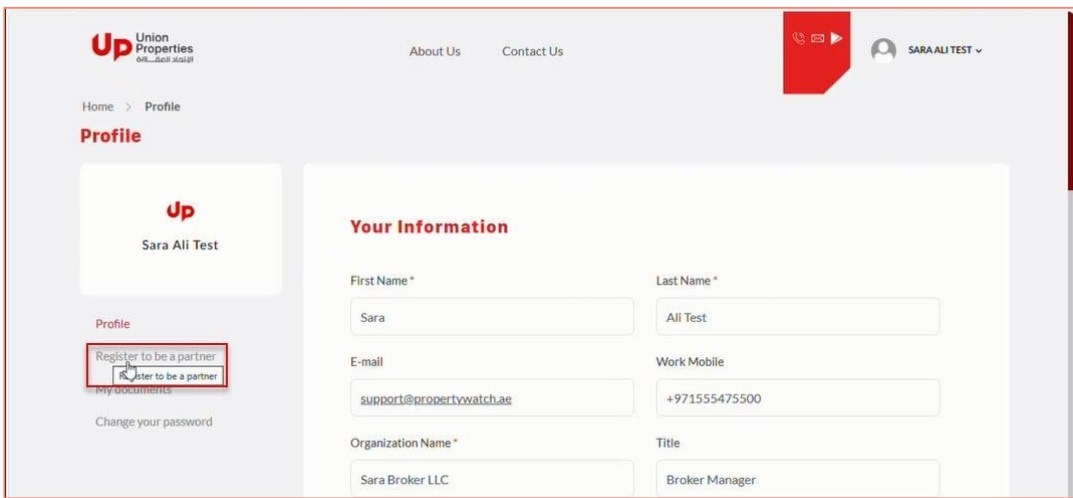


Figure 37 Accessing Register to be a partner

2. In the Partner Registration page, update the Trade License Expiry date.

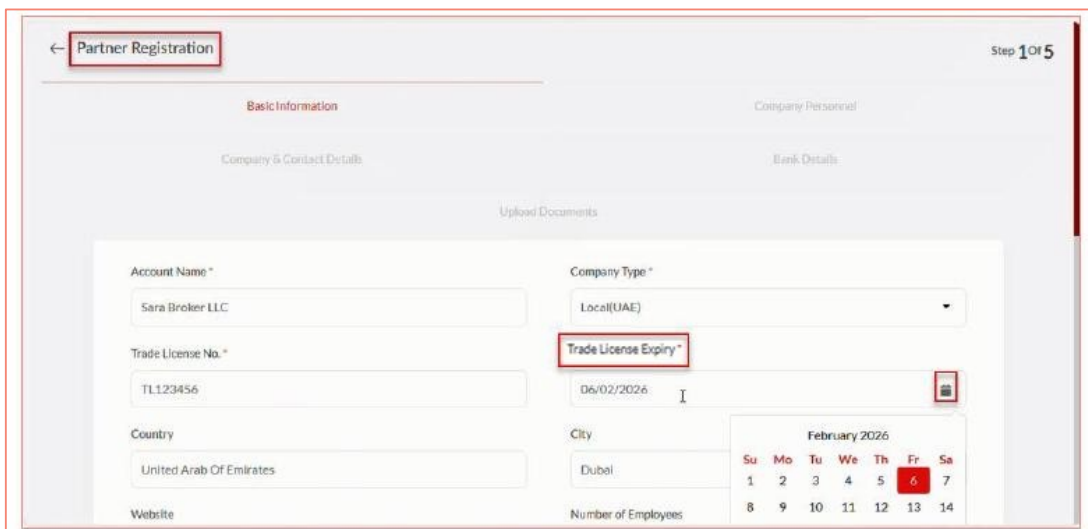


Figure 38 Updating License Expiry Date



3. Continue to the final step and open the Upload Documents section.

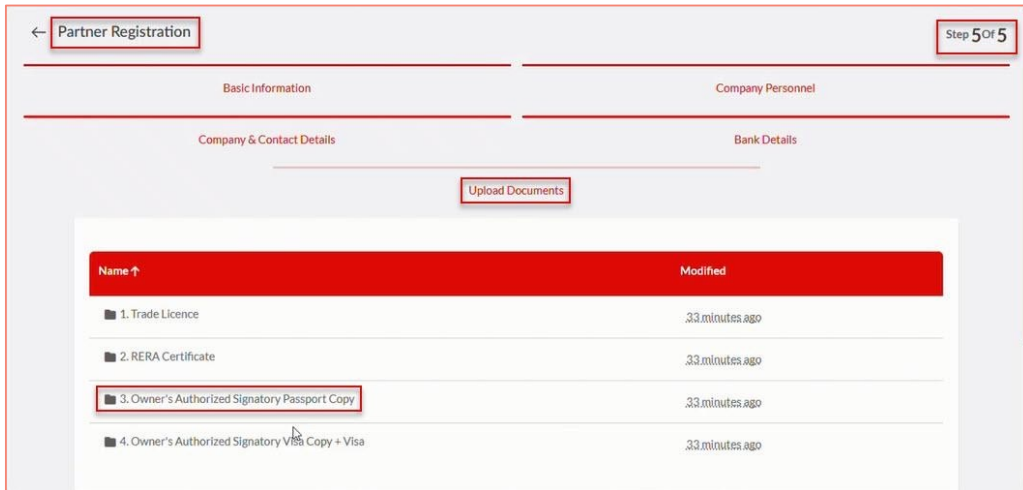


Figure 39 Upload Documents Page

4. Locate the document you want to update.
5. Click Add Files.



Figure 40 Clicking Add Files

6. In the Add files dialog:
 - Click Choose Files and select the new document.
 - Select Overwrite existing files.



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7. Click Add files to upload the updated document.

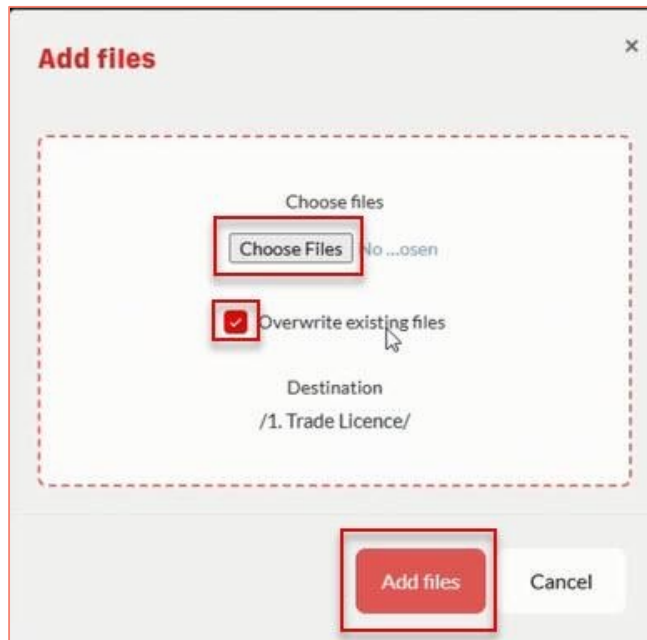


Figure 41 Add files Pop-up Dialog

8. Submit the registration update to save changes.

After submission:

- The new document replaces the existing file.
- The updated document appears in My Documents with the latest modified date.

IMPORTANT NOTES

- Document deletion is not supported.
- Overwriting a document permanently replaces the previous file.

All updates must be completed through Register to be a Partner, not from My Documents.



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6. Account Security

This section covers actions related to account protection and session management available to brokers through the Broker Portal.

6.1 Change Password

Brokers can update their account password at any time through the Profile menu.

To change the account password:

1. From the left navigation menu, click Change your password.

The screenshot shows the 'Your Information' page in the Union Properties Broker Portal. The user is Sara Ali Test. The left navigation menu includes 'Profile', 'Register to be a partner', 'My documents', and 'Change your password' (highlighted). The main form contains the following fields:

| Field | Value |
|---------------------|--------------------------|
| First Name * | Sara |
| Last Name * | Ali Test |
| E-mail | support@propertywatch.ae |
| Work Mobile | +971555475500 |
| Organization Name * | Sara Broker LLC |
| Title | Broker Manager |
| Nickname | |
| Web Site | |
| Public Profile Copy | |

Figure 42 Change your password Option

2. In Change your password page, enter:

- Old password
- New password
- Confirm new password

3. Click Change Password to save the changes.

The screenshot displays the 'Change your password' page. At the top left is the Union Properties logo. The navigation bar includes 'About Us' and 'Contact Us'. The user's name 'SARA ALI TEST' is shown in the top right. The breadcrumb trail is 'Home > Profile > Change your password'. The main heading is 'Change your password'. On the left, there is a profile card for 'Sara Ali Test' with links for 'Profile', 'Register to be a partner', 'My documents', and 'Change your password'. The main form area contains the following fields: 'User name' (TestBroker), '* Old password' (I), '* New password', and '* Confirm password'. A red 'Change password' button is located at the bottom of the form.

Figure 43 Change Password Page

Once the password is updated successfully, the new password becomes active immediately for subsequent logins.



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Thank you

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