PROPERTY WATCH

Broker Portal User Manual

User Guide v1.3

2026

Provided by: Property Watch

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1 Document Identification

Data Confidentiality

This document is an internal business document of **Property Watch** (hereinafter referred to as the "**Provider**") containing trade secrets and other confidential information of Property Watch and its clients that is the property of **Union Properties** (hereinafter referred to as the "**Client**"). The information contained in this document should not be distributed or disseminated in whole or in part, including but not limited to printing in paper or electronically without the prior permission of **Property Watch**.

1. Introduction

This manual covers the essential features and workflows of the Broker Portal, guiding users through each step of the process. It is intended for brokers and authorized users who require access to the portal for daily operations. The scope includes:

- Account registration and login procedures.
- Navigation of the dashboard and key modules.
- Case creation, submission, and tracking.
- Profile and document management.
- Company information updates.
- Security practices such as password management and sign-out.

The objective

The purpose of this document is to provide an end-to-end guidance on the workflow of the broker's journey within the portal.

Scope

This document is intended for brokers only.

2.1 Version Control

Document Version	Delivery Date
v1.0	08-Feb-2026
v1.1	16-Mar-2026
v1.2	18-Mar-2026
v1.3	15-Apr-2026

2. 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.

2.2 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 **Sign In**.

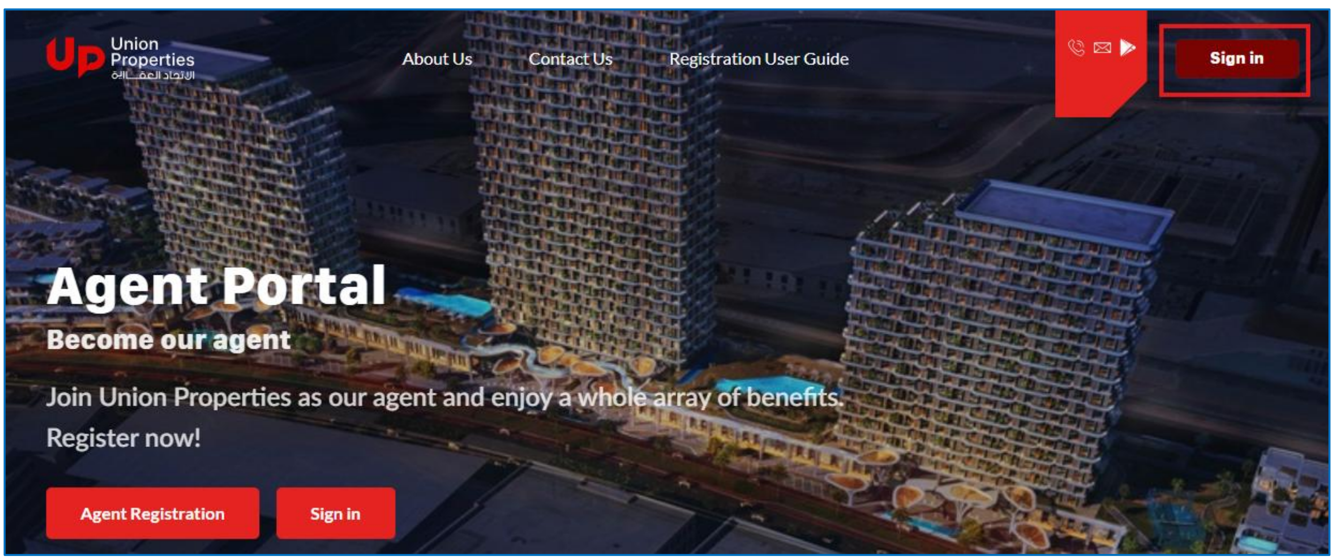

Figure 1 Broker Portal Landing Page - Sign In

3. On the Login page, click **Sign up**.

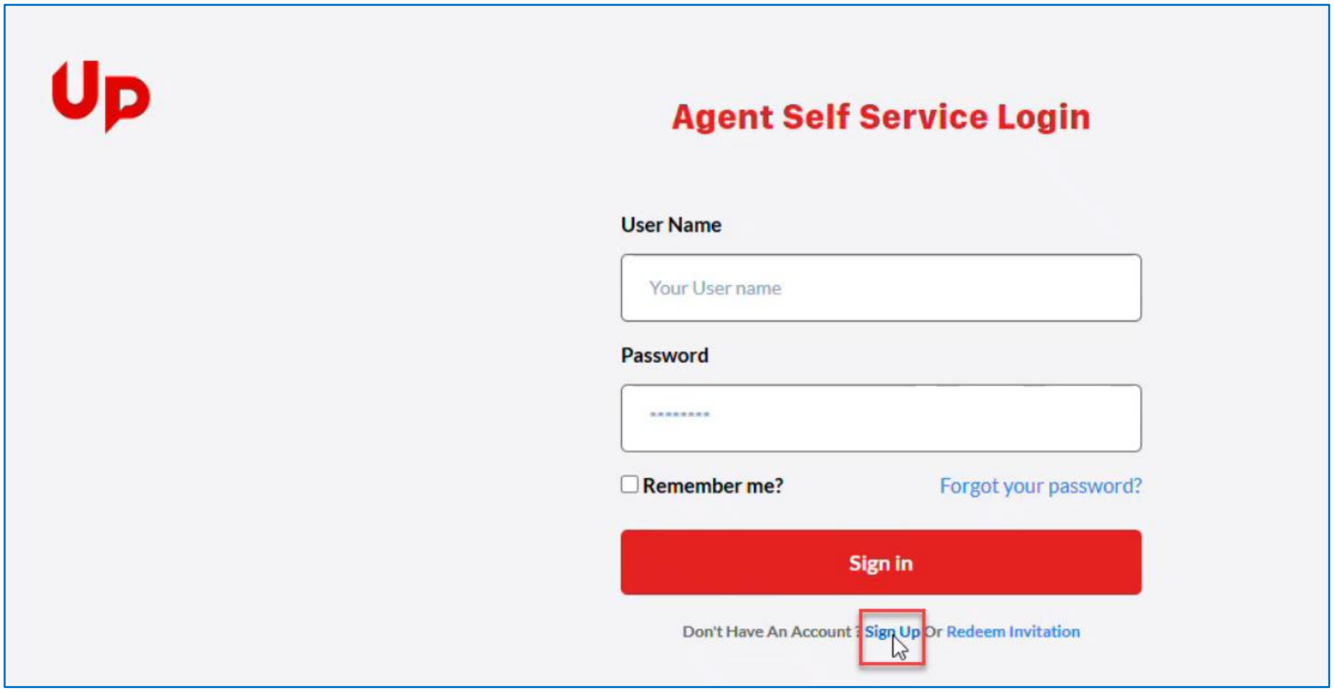

Figure 2 Signing up to the Broker Portal

4. On the **Register** page,

    a. Provide a valid **Email address**.

⚠ 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**.

3. Click **Register**.

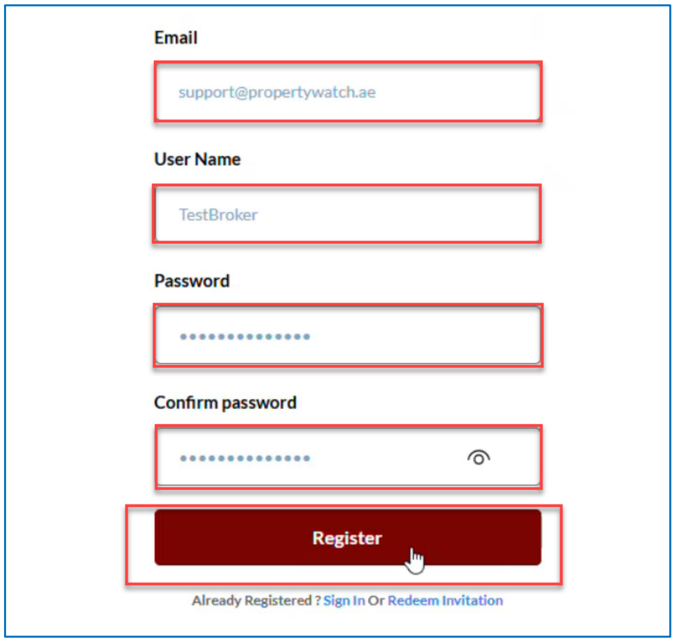

Figure 3 Complete Registration

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.

2.3 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**.

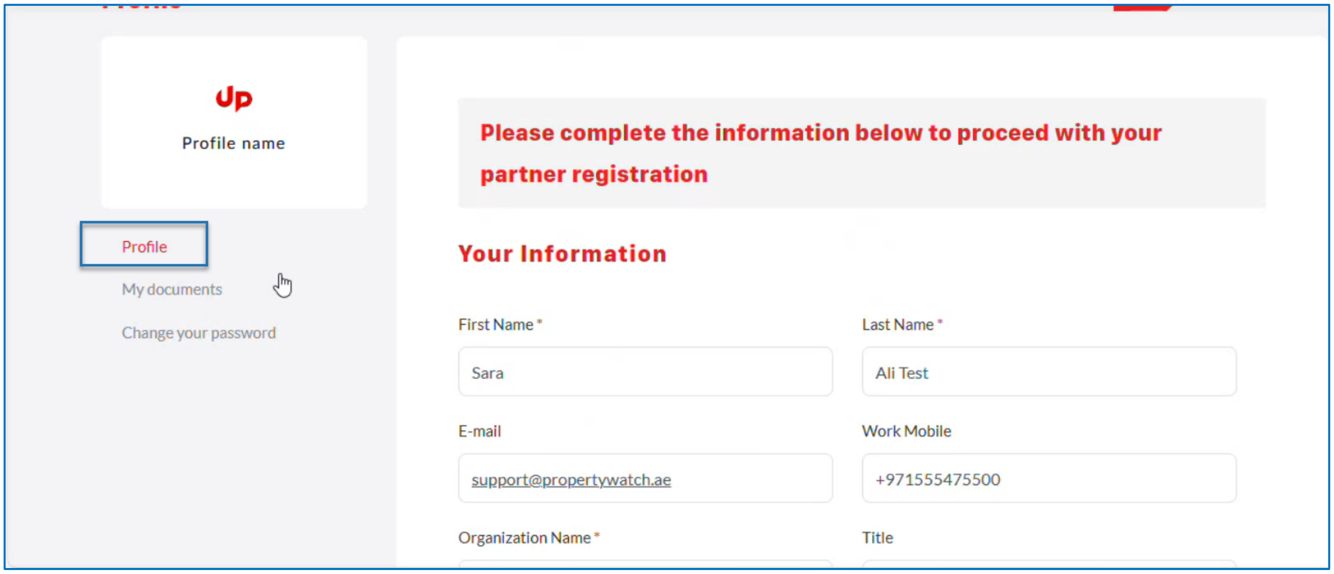

Figure 4 Accessing Profile Page

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

4. Click **Update**.

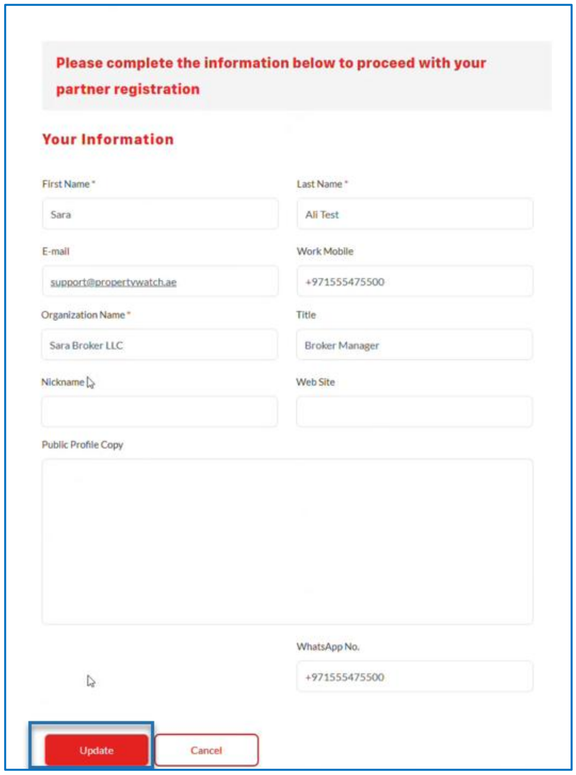

Figure 5 Updating Profile

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

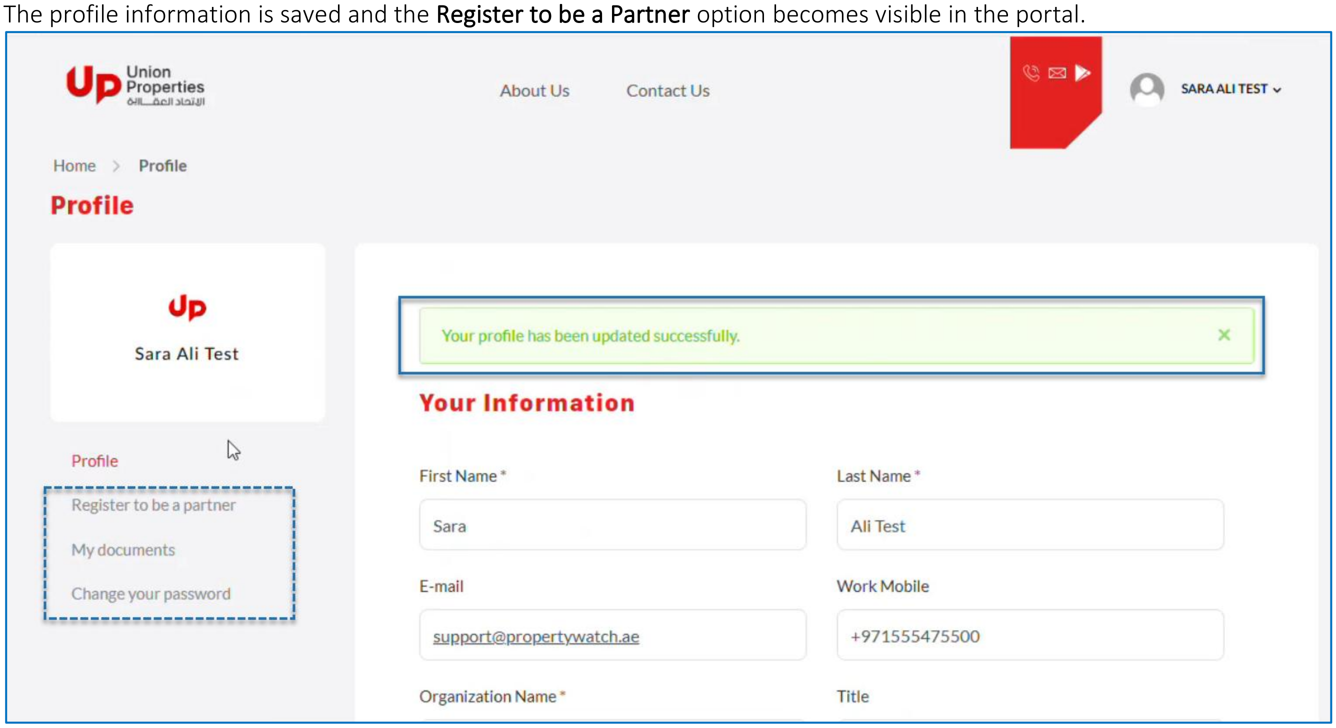

Figure 6 Profile Registered

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.

2.4 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**.

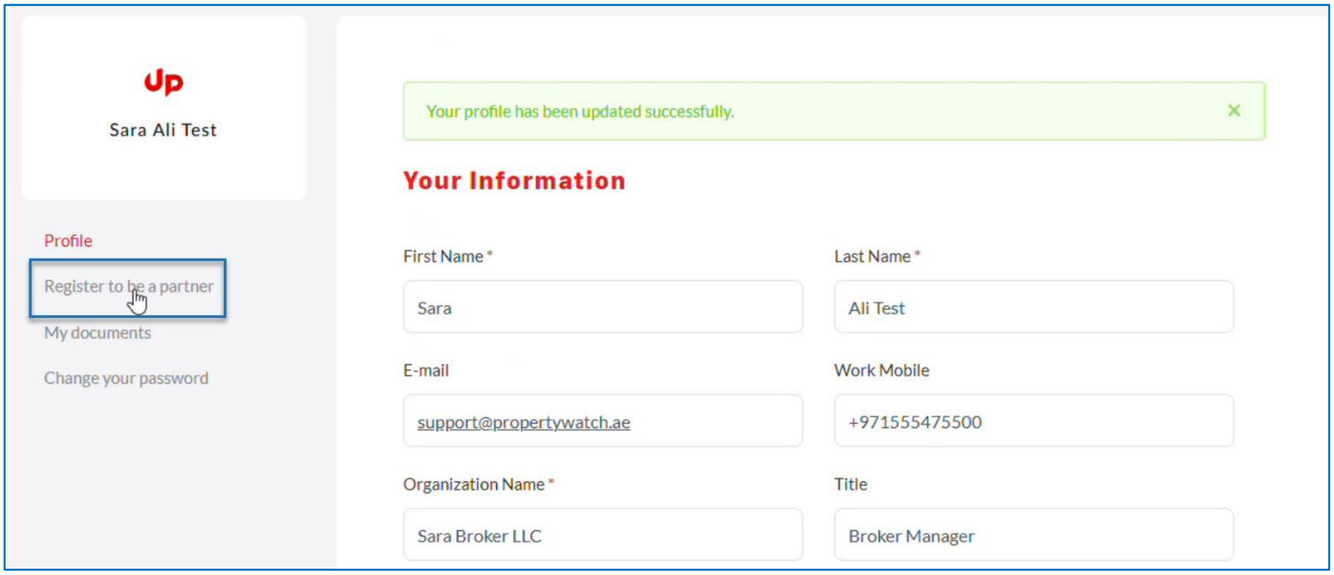

Figure 7 Register a Contact to be a Partner

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

2.3.1 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.

2. Click **Next**.

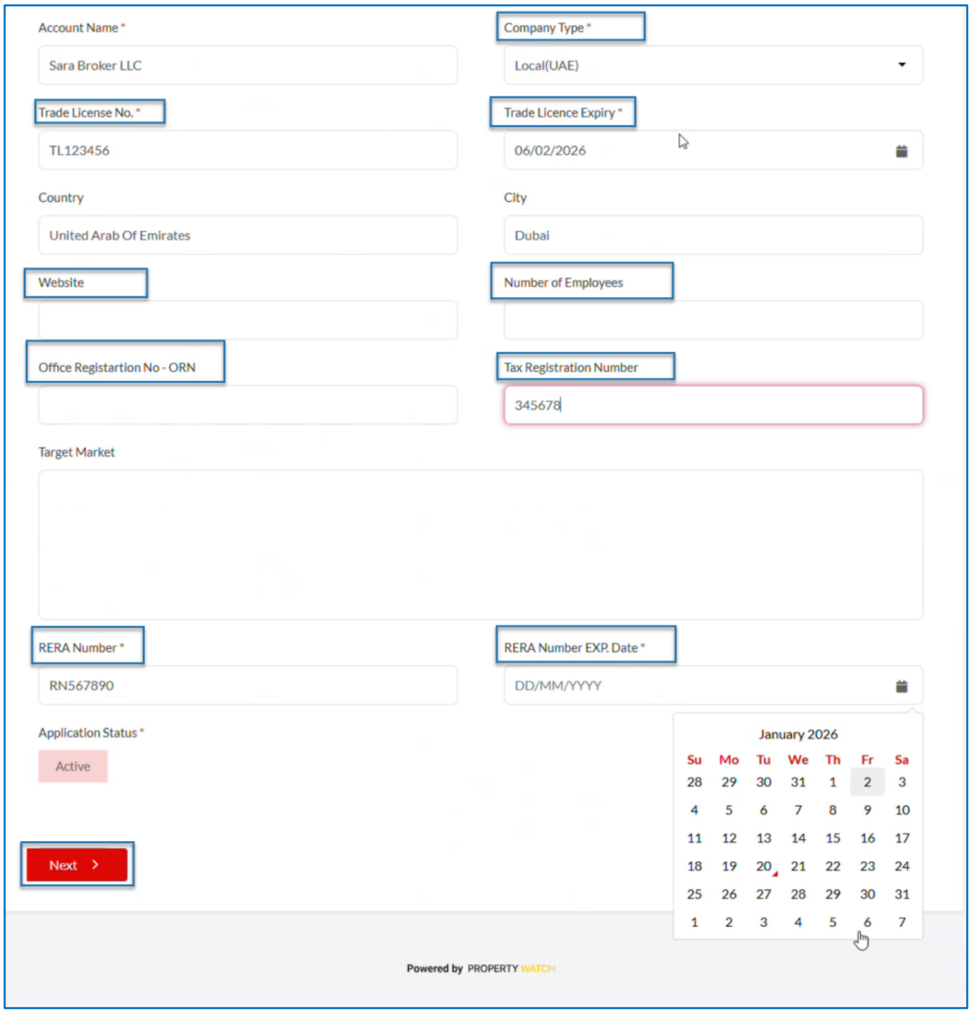

Figure 8 Register a Contact as a Partner

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.

2.3.2 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.**

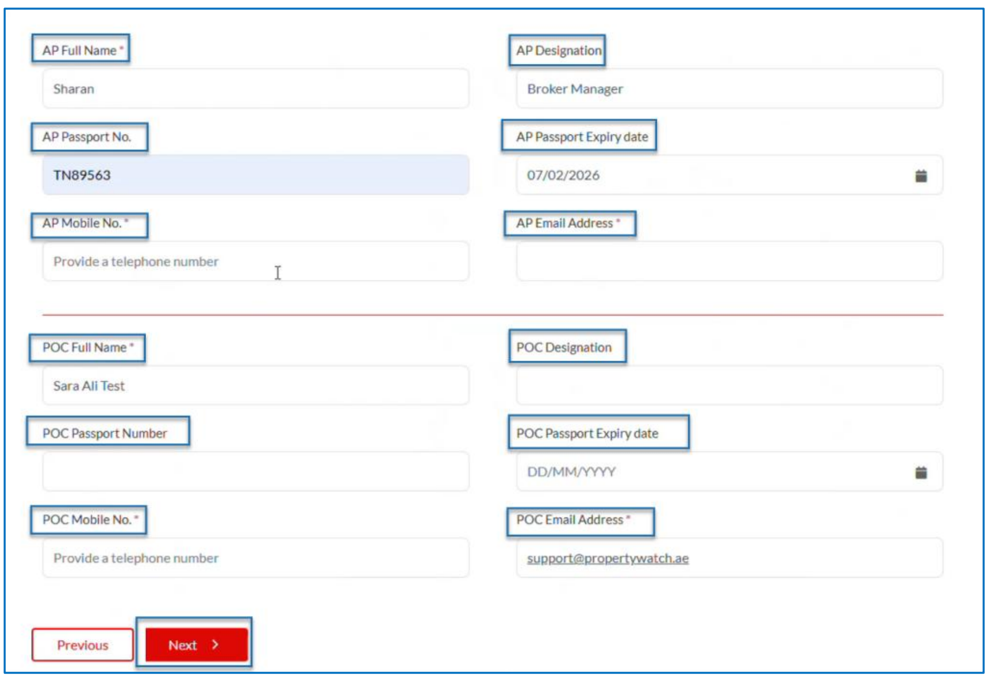

Figure 9 Adding Authorized Person Details

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
2. Click **Next**.

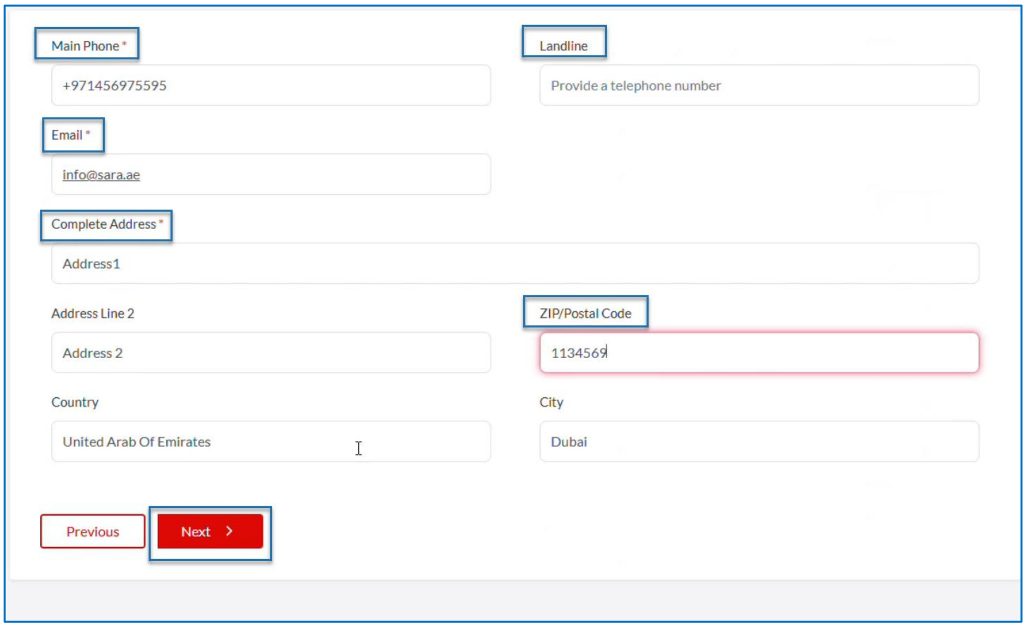

Figure 10 Adding Company and Contacts Details

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

2.3.3 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**.

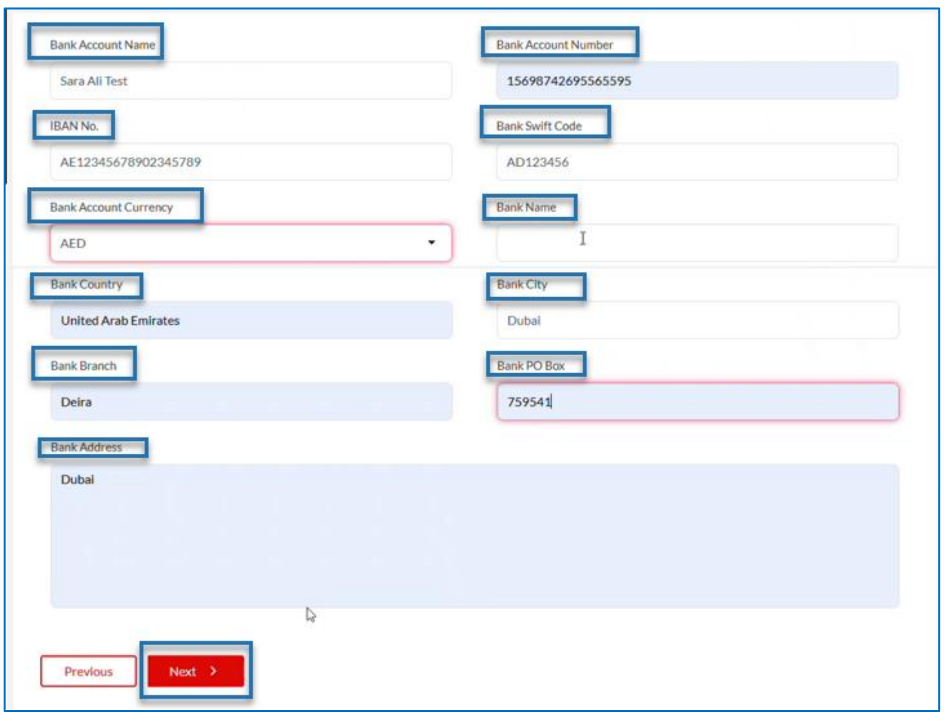

Figure 11 Add Banking Details

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.

2.3.4 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**

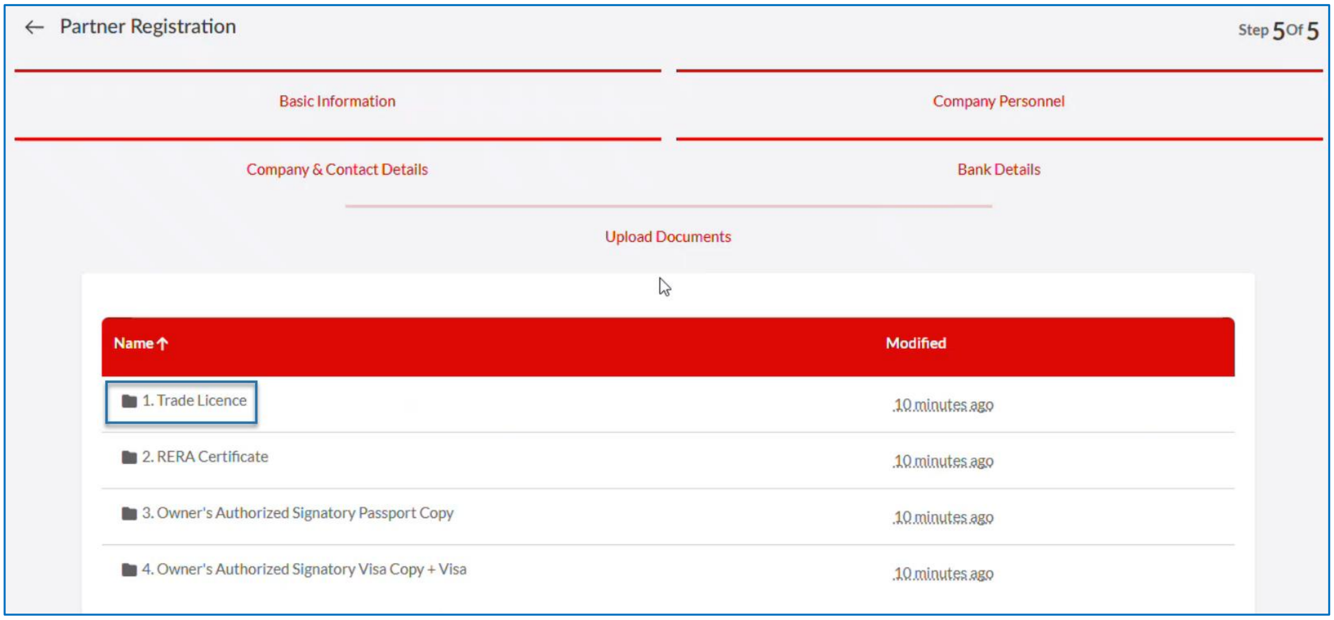

Figure 12 Uploading Documenta - Trade License

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**.

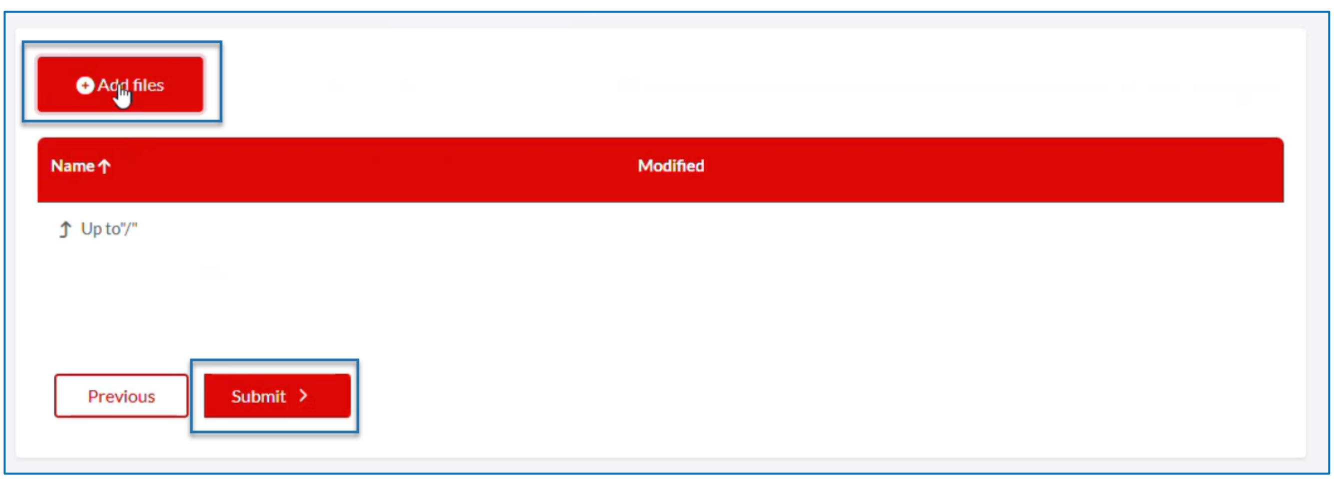

Figure 13 Adding and Submitting Files

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

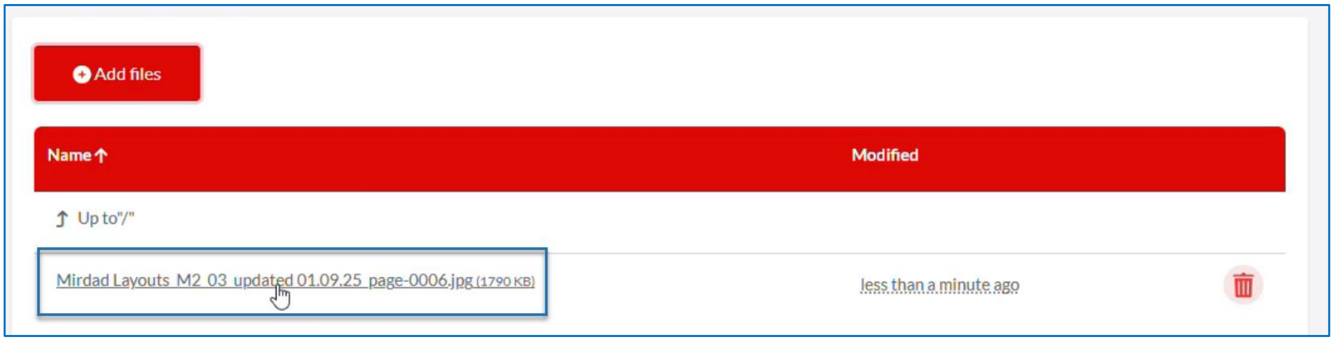

Figure 14 File Uploaded

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

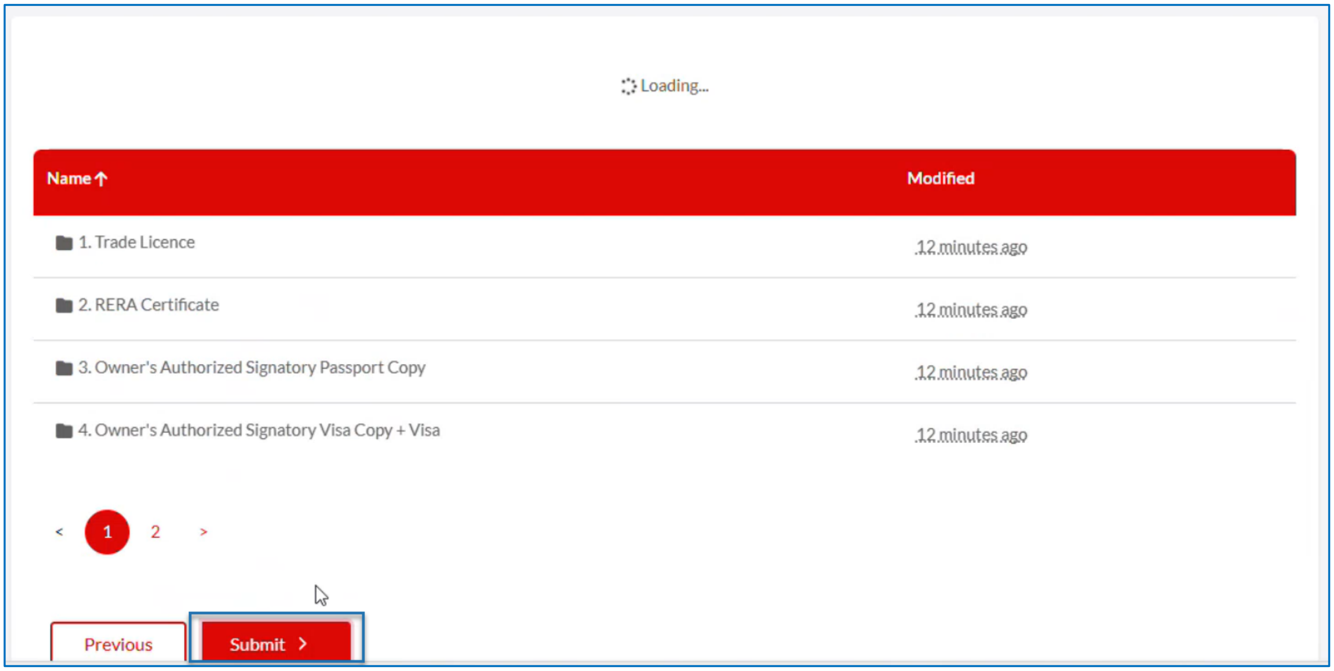

Figure 15 Submit Uploaded Documents

⚠ 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.

3. 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.

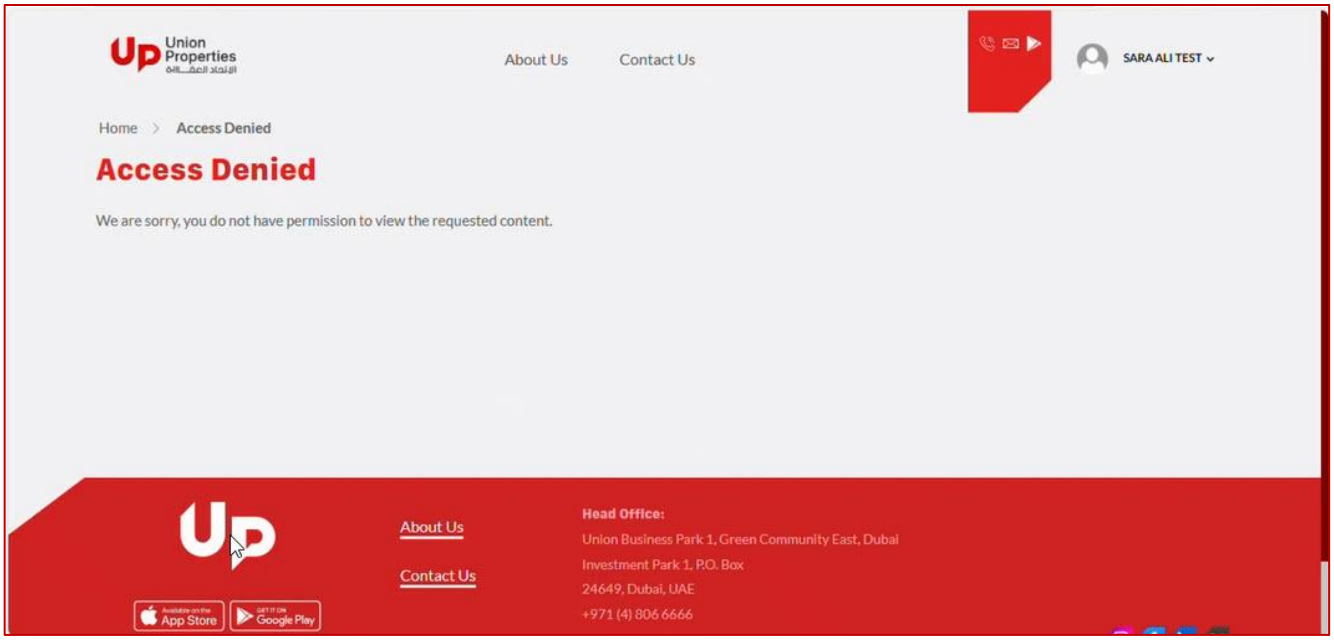

Figure 16 Access Denied Message

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

- Cases
- Settings

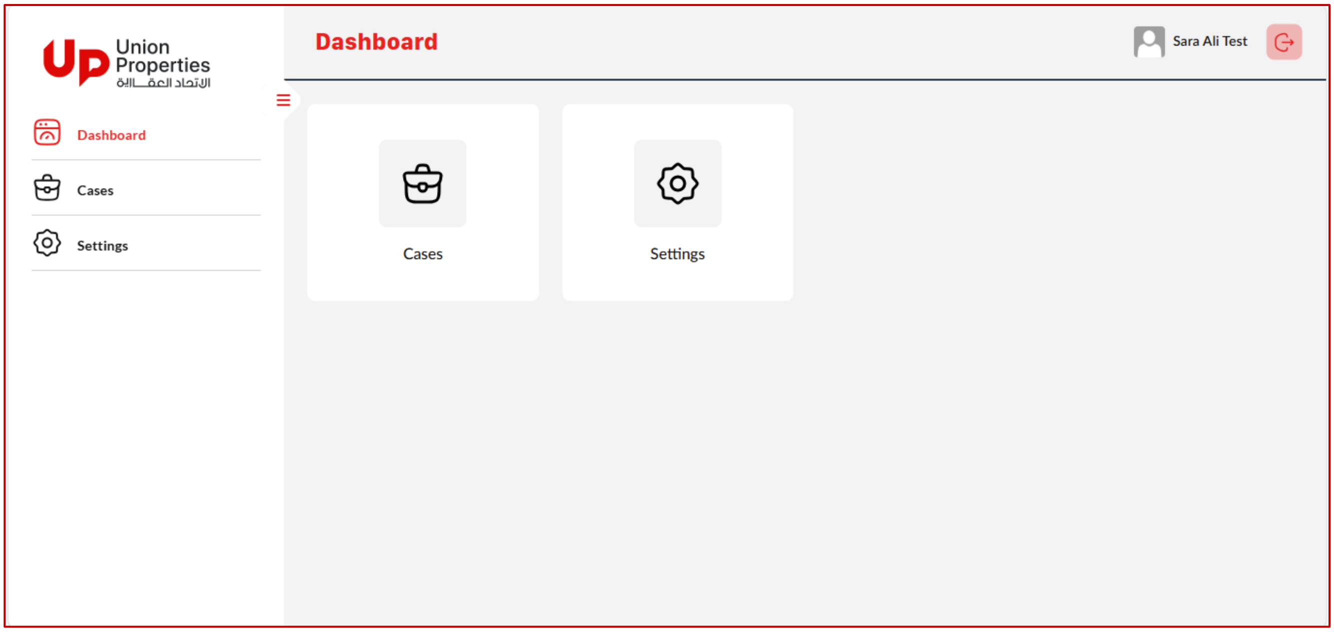

Figure 17 Broker Portal Dashboard View

4. 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.

4.1 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.**

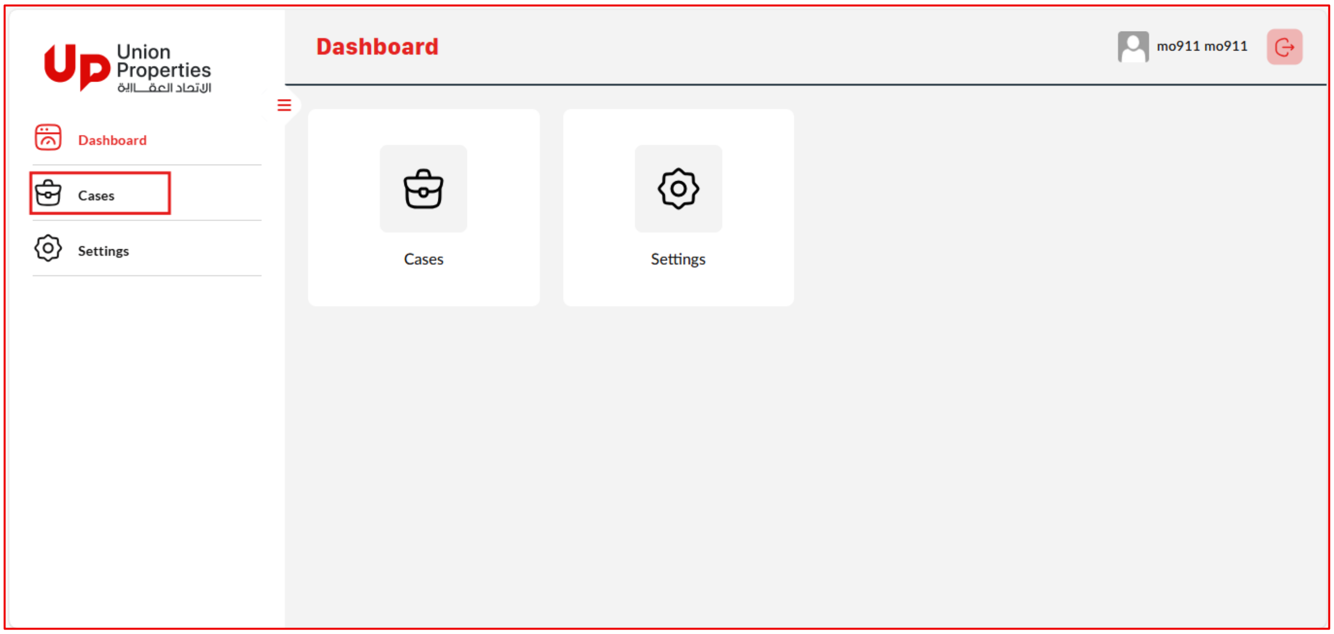

Figure 18 Accessing Cases from Dashboard

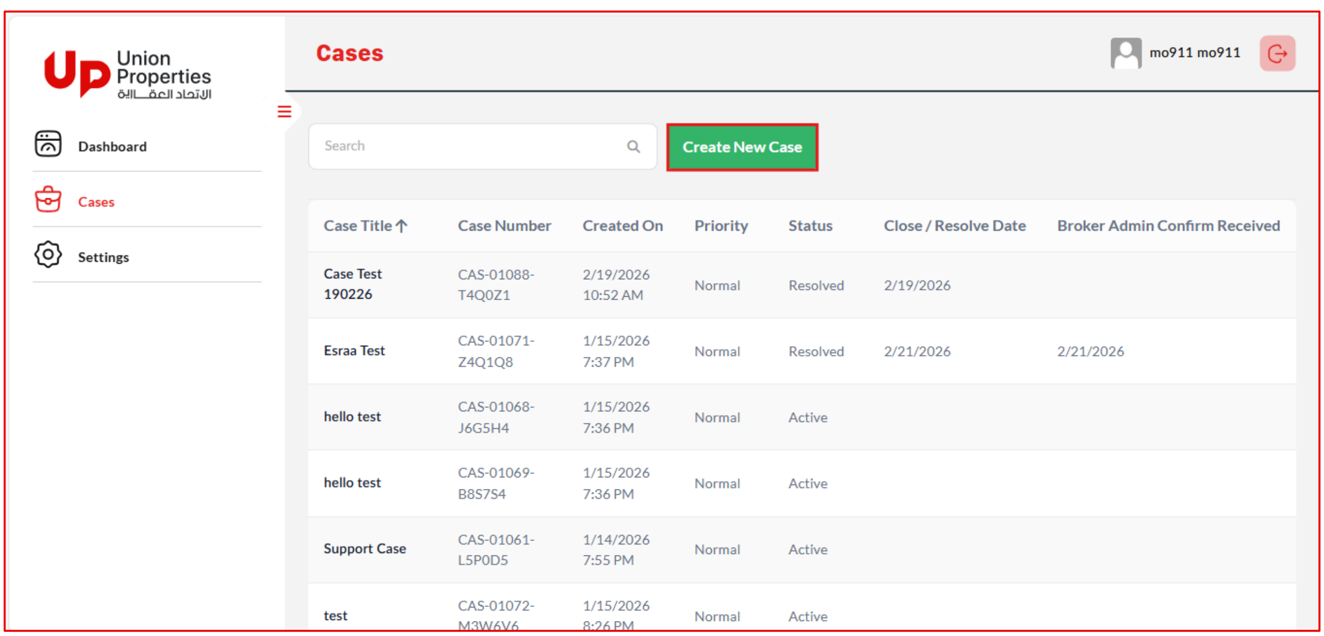

Figure 19 Creating a New Case

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 20*)*
    - **Description:** Enter details of the request or issue.
4. Click **Submit**.

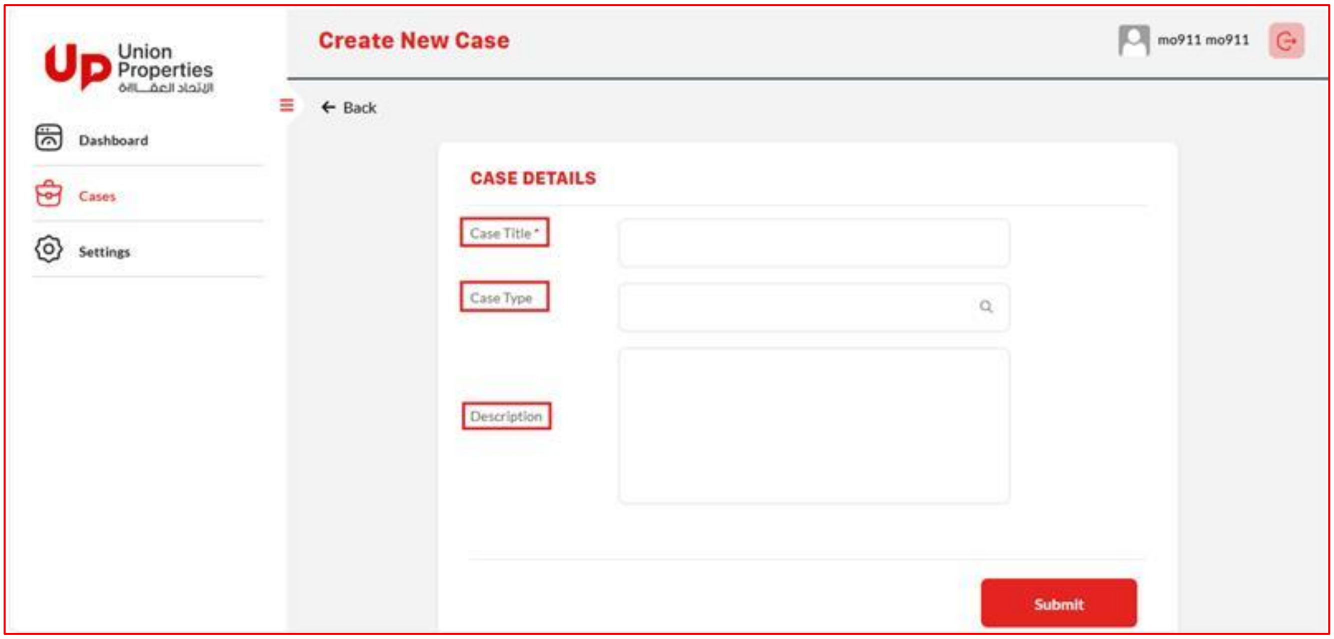

Figure 20 Case Details Form

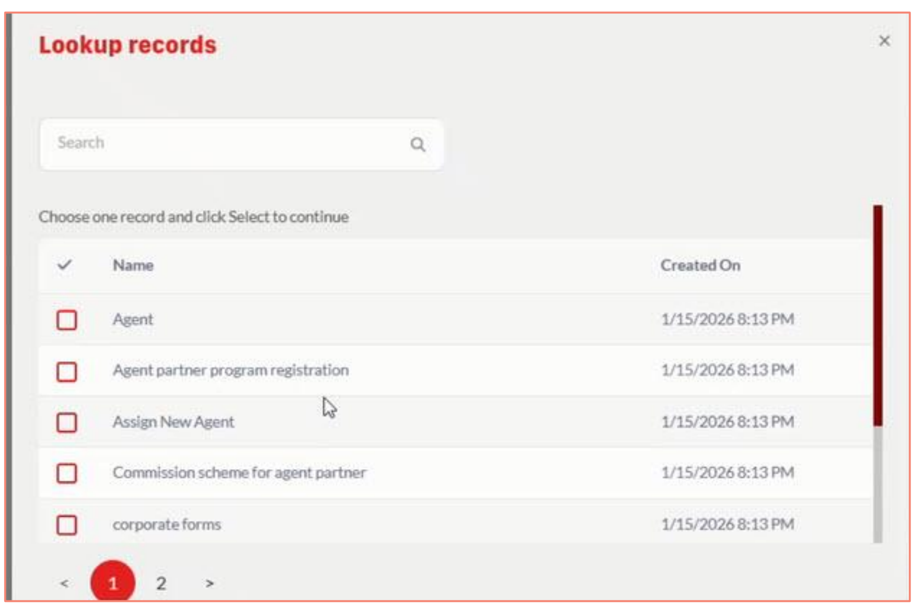

Figure 21 Case Type Selection Dialog

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.

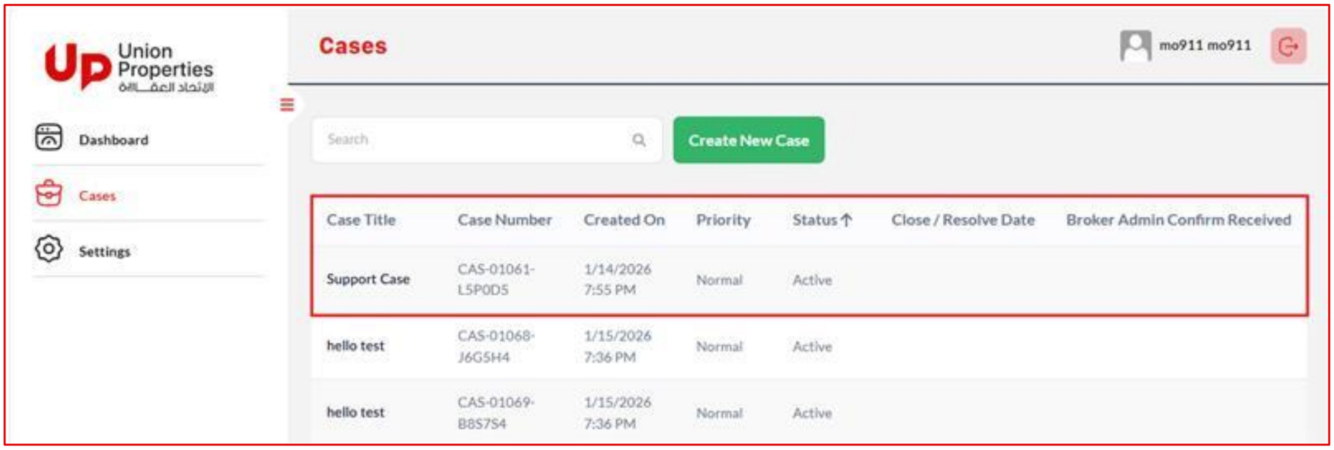

Figure 22 Newly Created Case in Broker Portal

4.2 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.

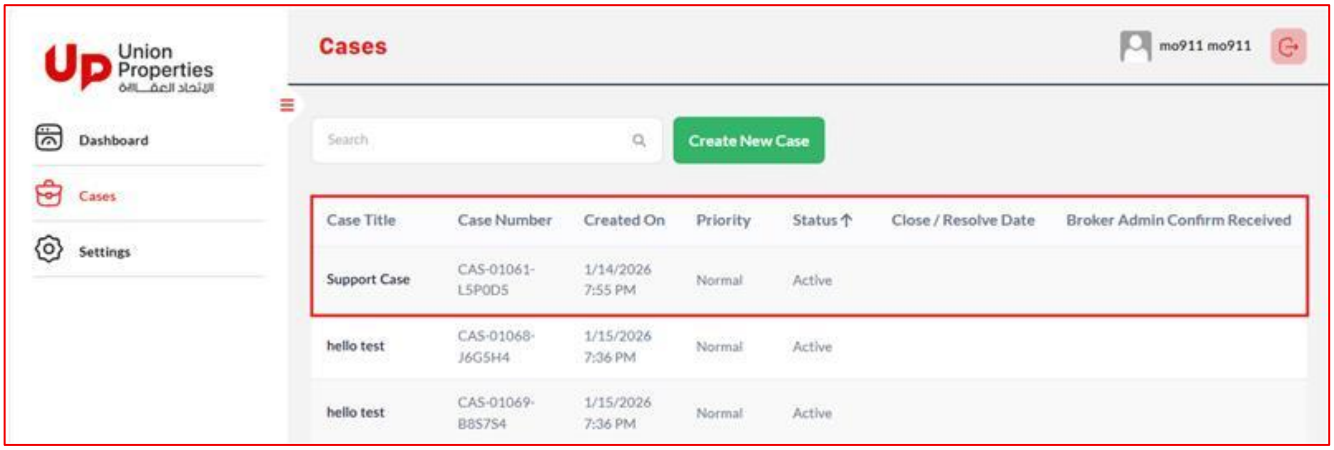

Figure 23 Tracking Case Status

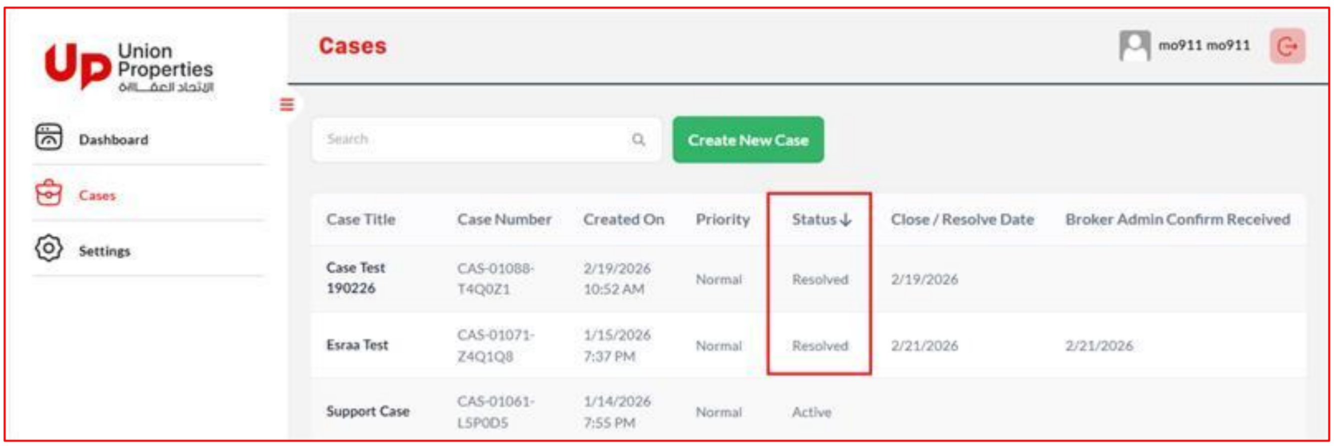

Figure 24 Case Status Updated

4.3 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**.

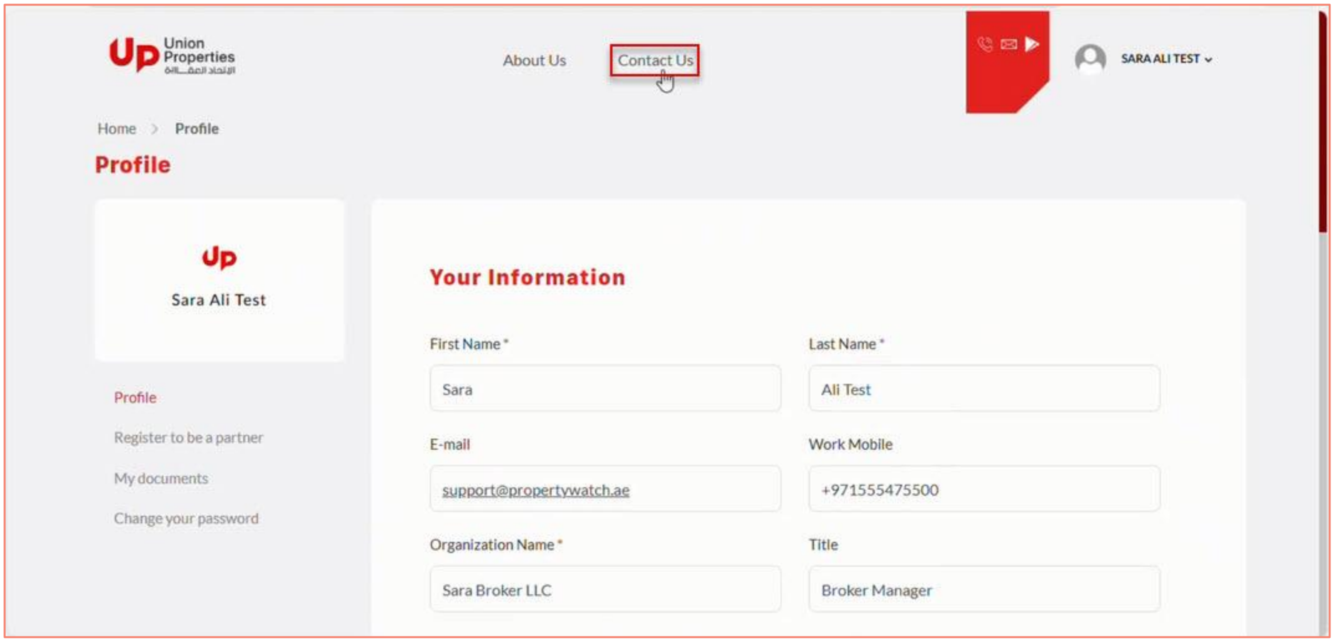

Figure 25 Contact Us Option Before Dashboard Access

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

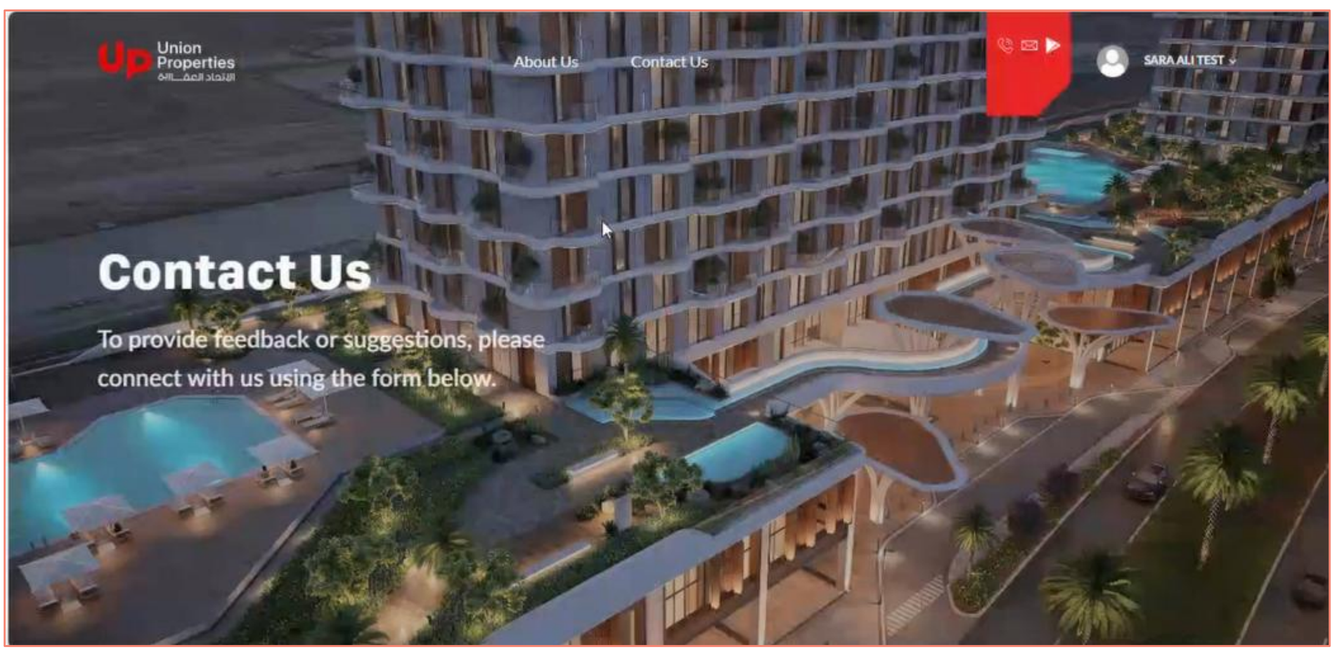

Figure 26 Contact Us Page

2. In the **Contact Us** form, enter the following information:
    - **Case Title** (for example: Registration Support)
    - **Description** (details of the issue or request)

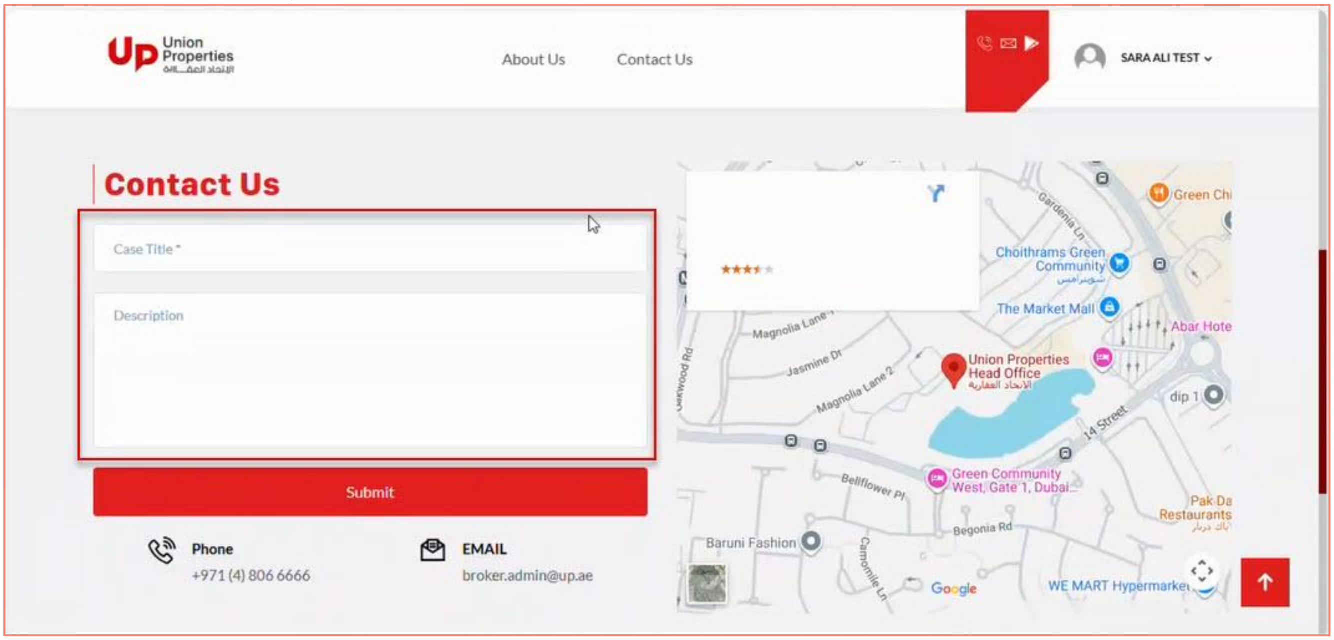

Figure 27 Submitting a Case via Contact Us

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.

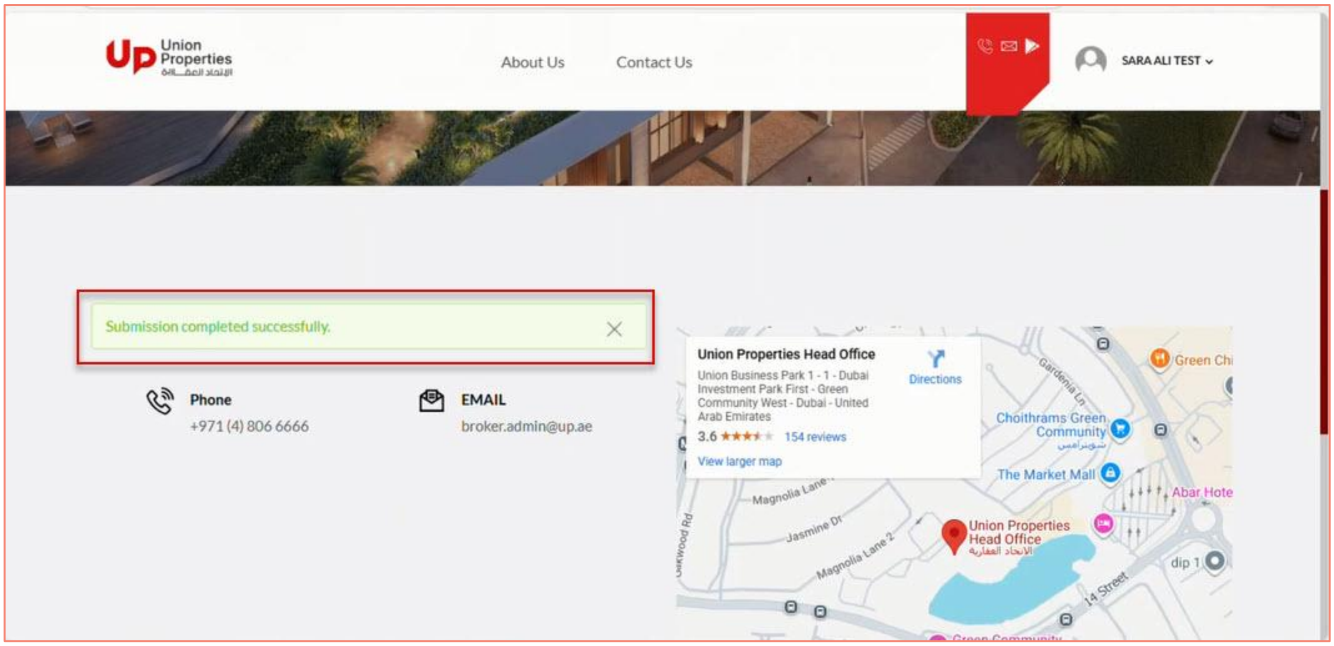

Figure 28 Confirmation Message After Submission

⚠️ 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.

5. 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.

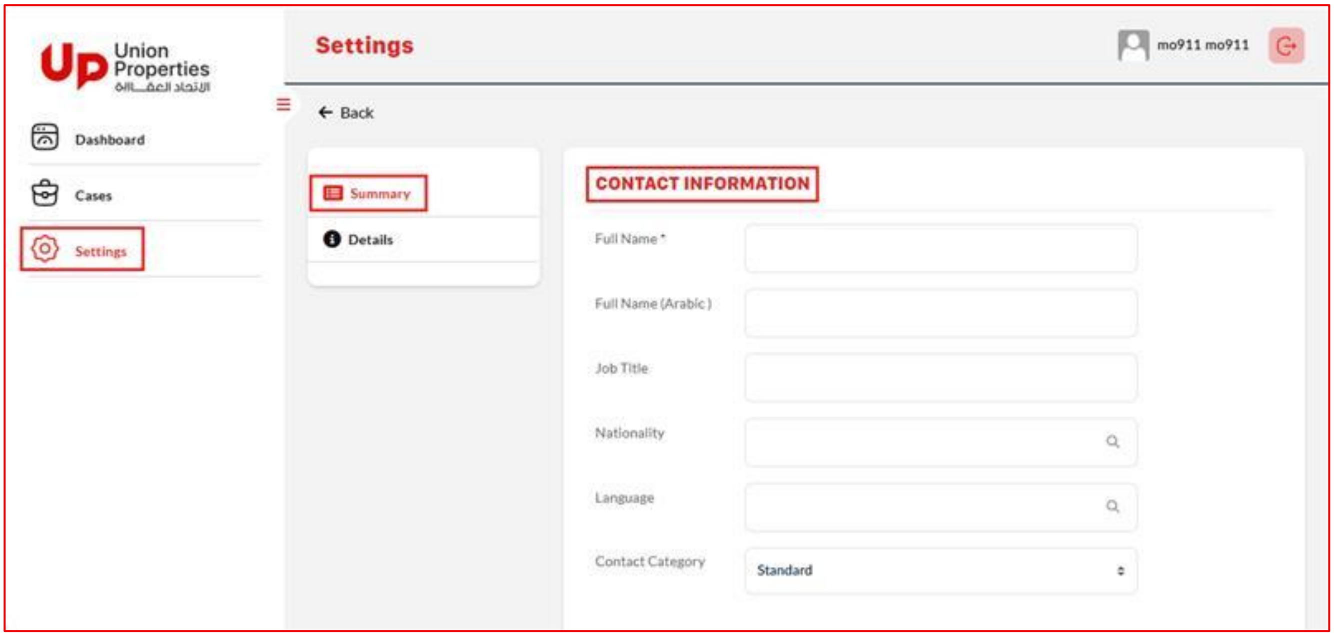

Figure 29 Settings – Summary Tab (Contact Information)

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.

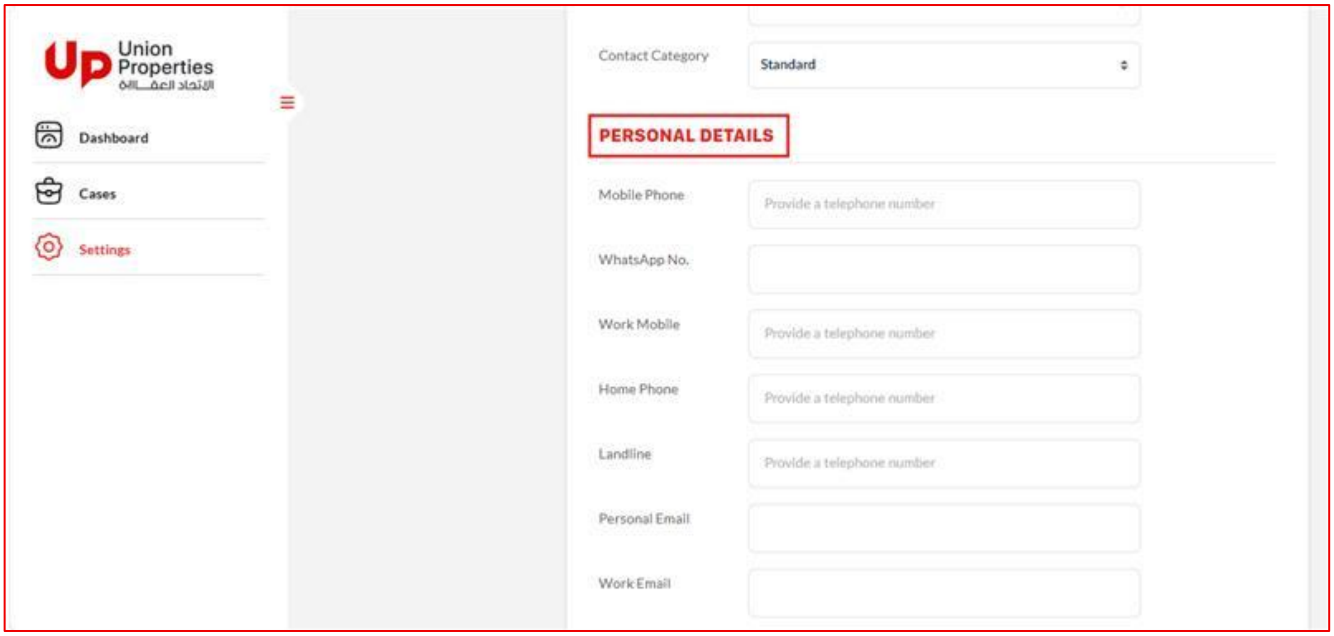

Figure 30 Settings – Summary Tab (Personal Details)

3. The following fields are **view-only** and cannot be edited:
    - Name
    - Organization name

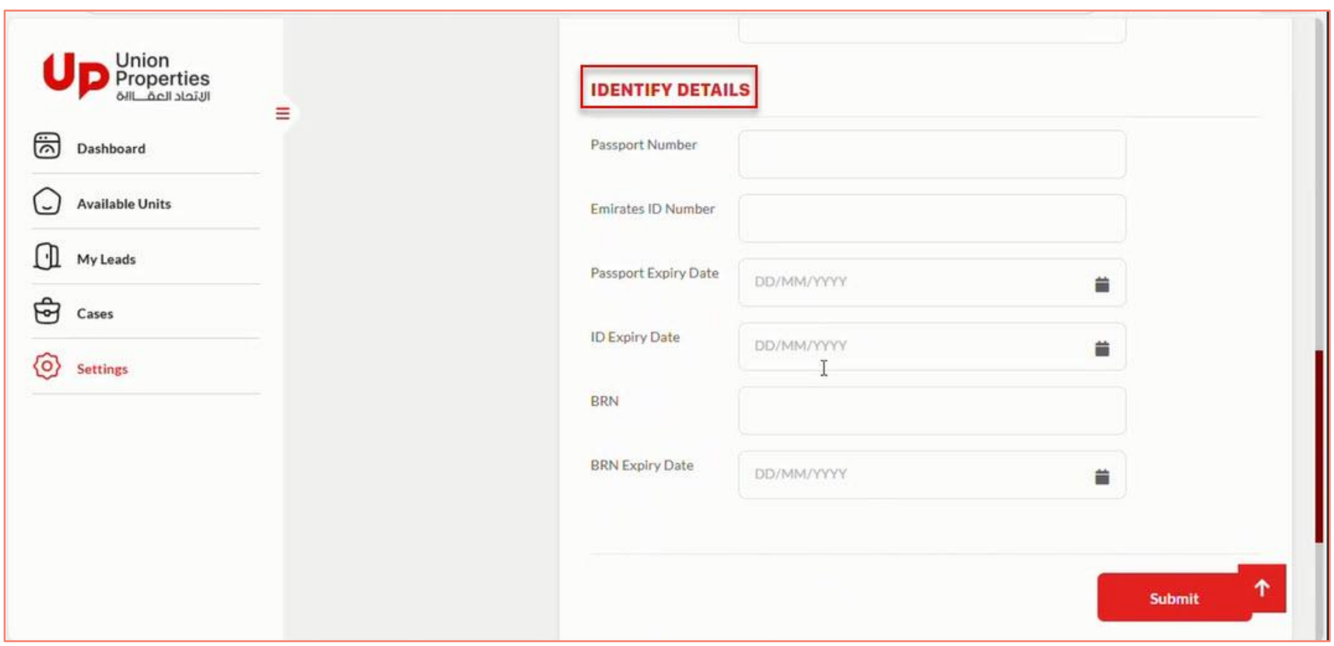

Figure 31 Settings Page – Summary Tab (Identify Details)

4. To update additional profile information, click the **Details** tab. See Figure 32.
5. From the **Details** tab, brokers can configure contact preferences, including:
    - Preferred Personal Information
    - Contact preferences

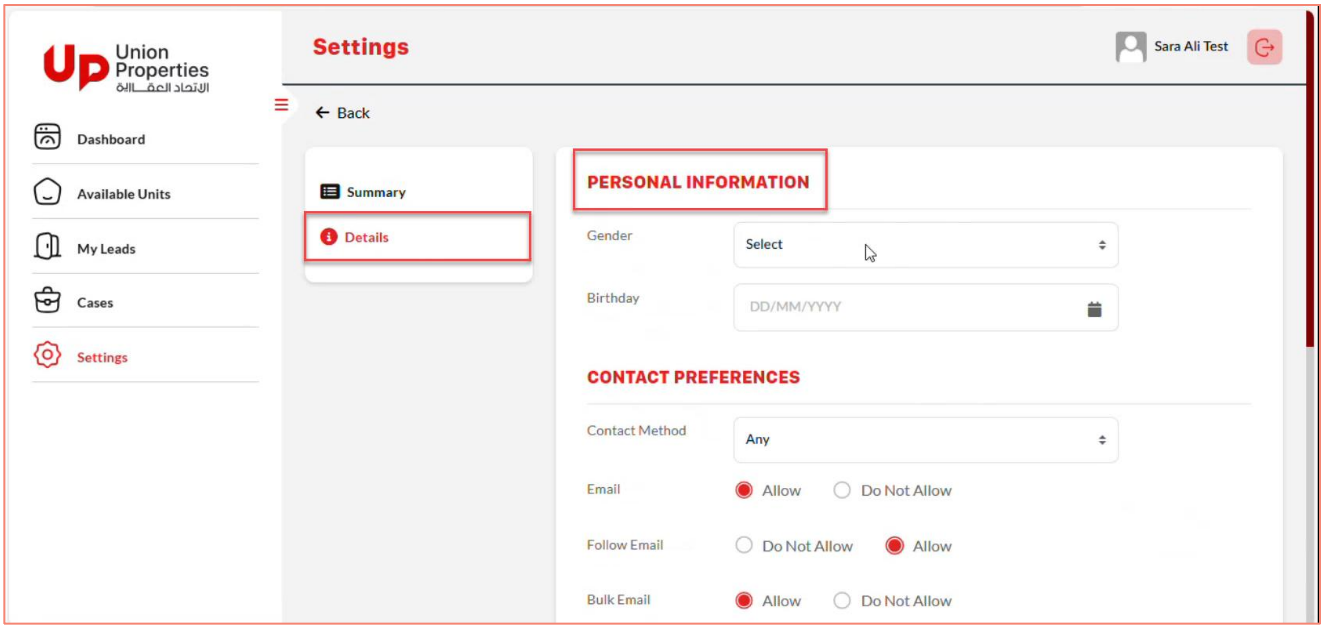

Figure 32 Settings Page – Details Tab (Personal Information)

6. Under the **PERSONAL INFORMATION** section, select the following:
    - Gender
    - Birthday date
7. Under the **CONATCT PREFRENCES** 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.**

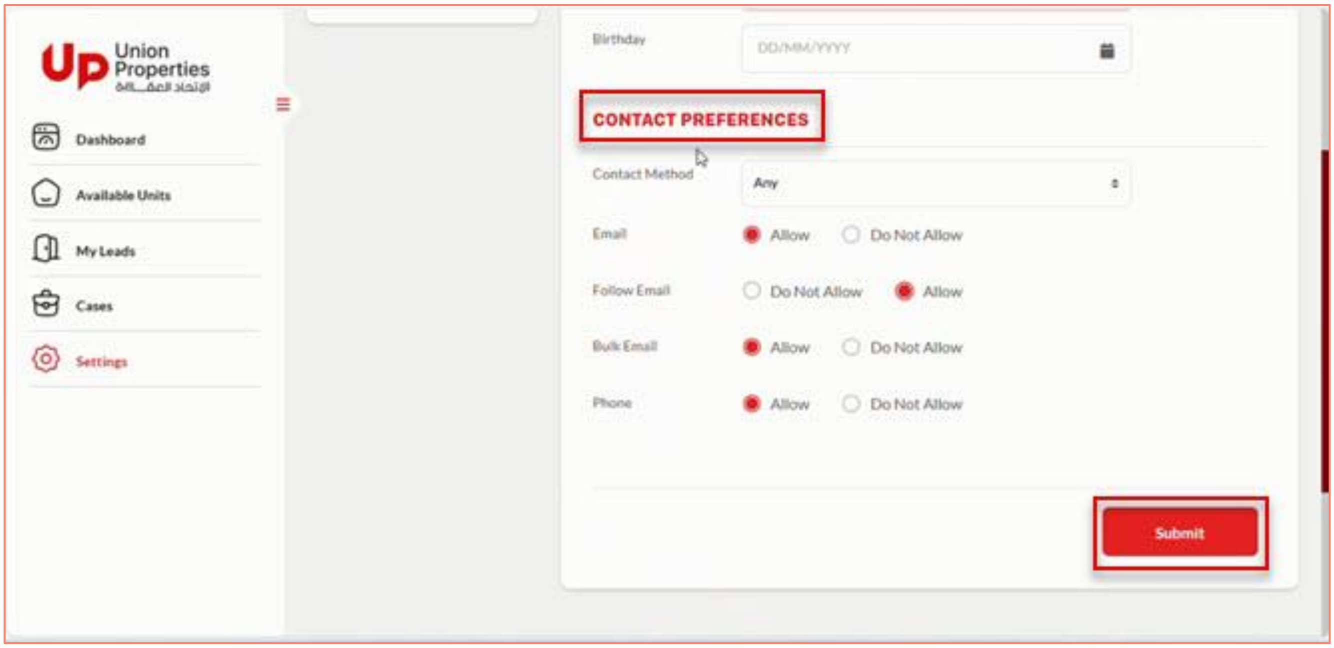

Figure 33 Settings Page – Details Tab (Contact Preferences)

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

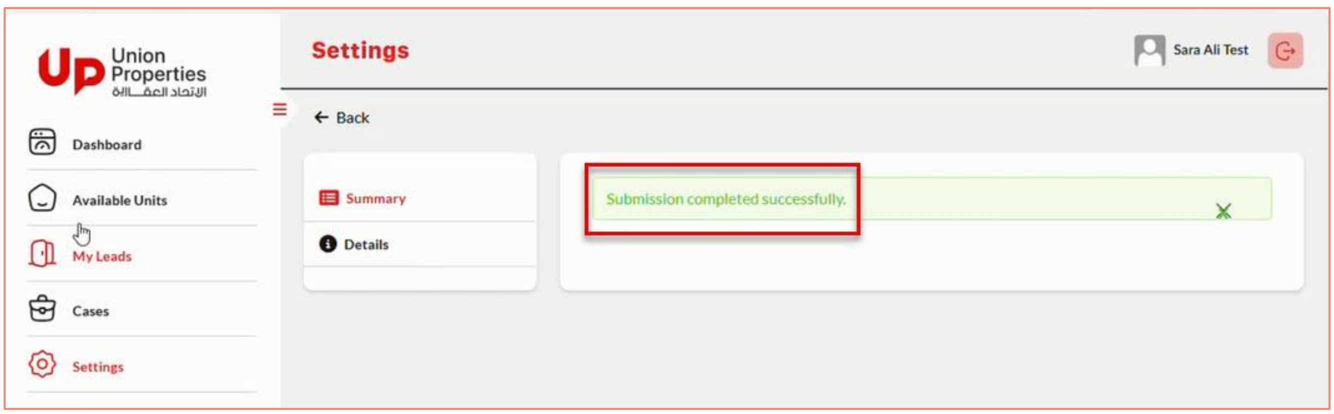

Figure 34 Profile Update Confirmation Message

6. 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.

6.1 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**.

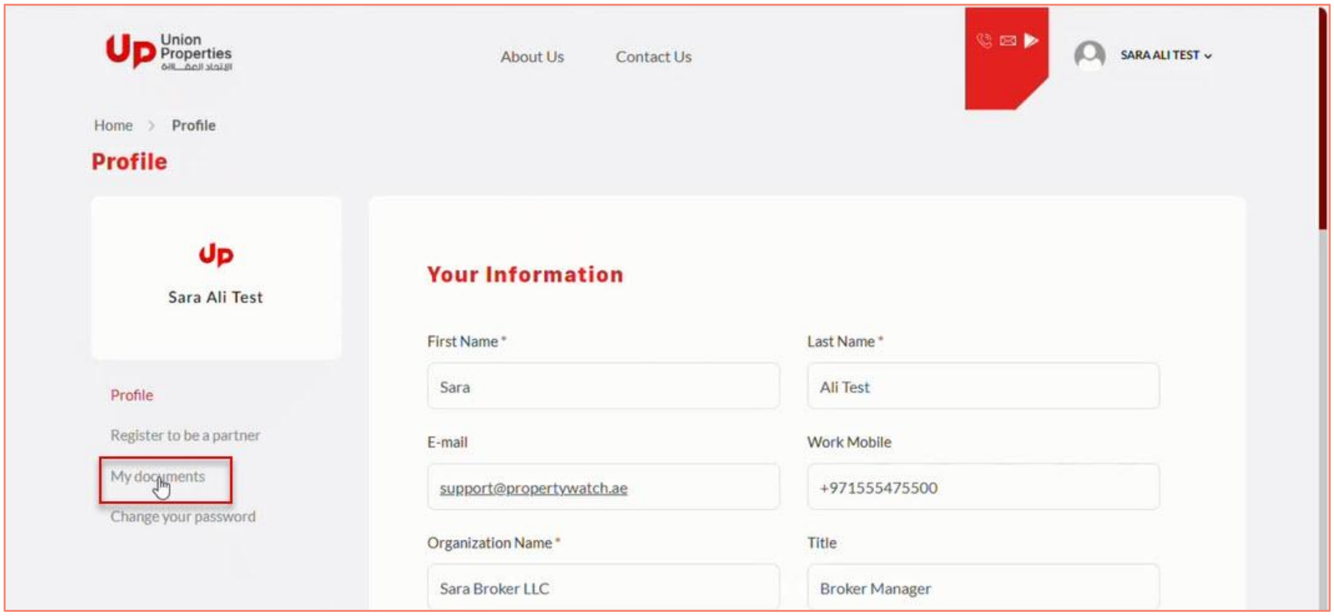

Figure 35 Accessing My Documents

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

3. Review the list, which includes:
    - Document name
    - Last modified date

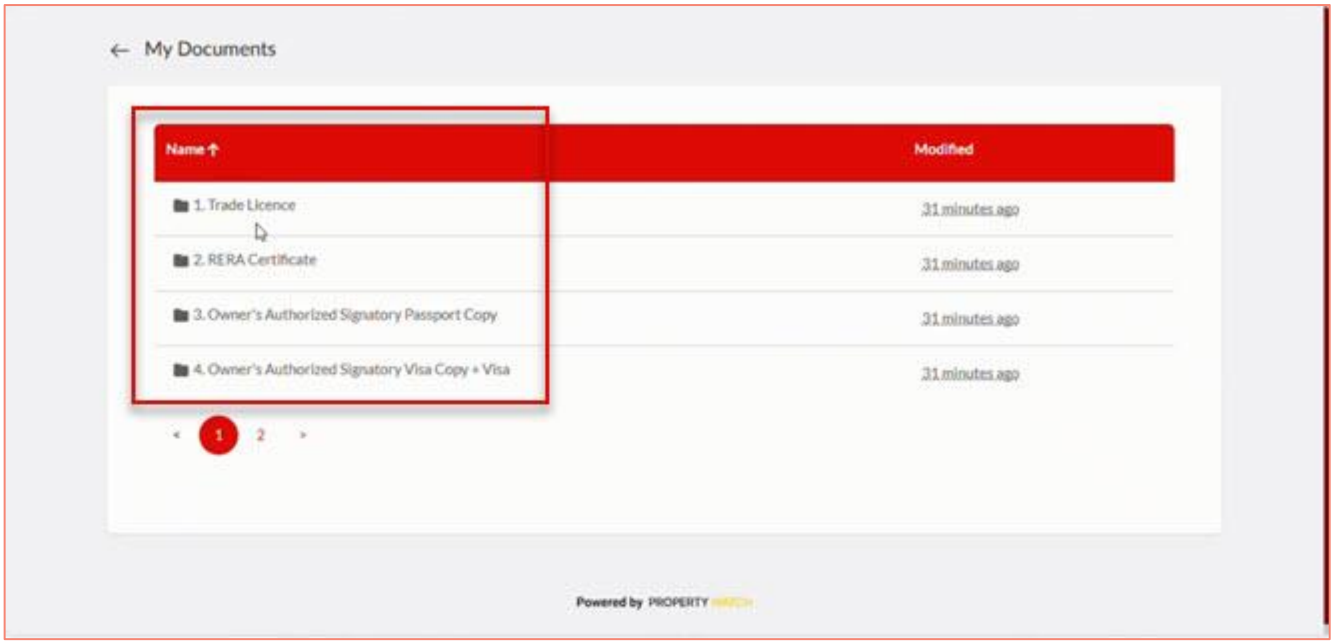

Figure 36 List of Uploaded Documents

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

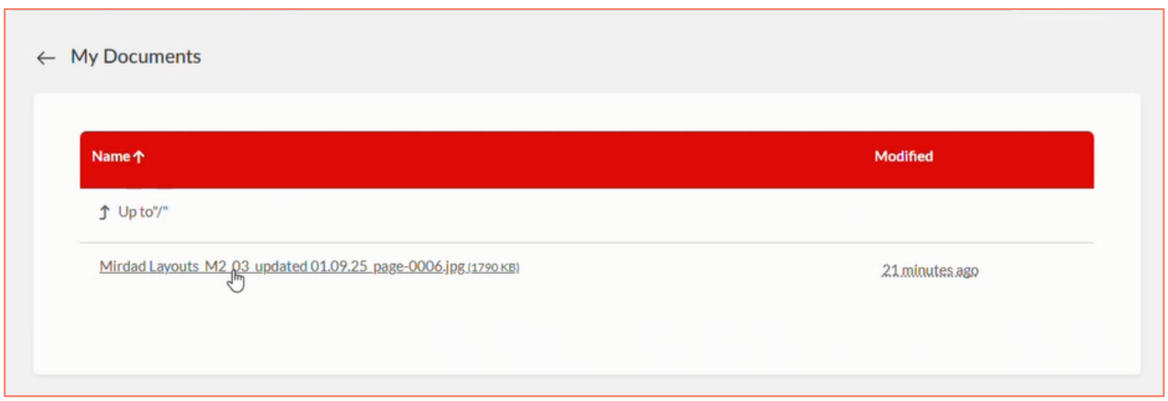

Figure 37 Clicking Document for Download and View

6.2 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**.

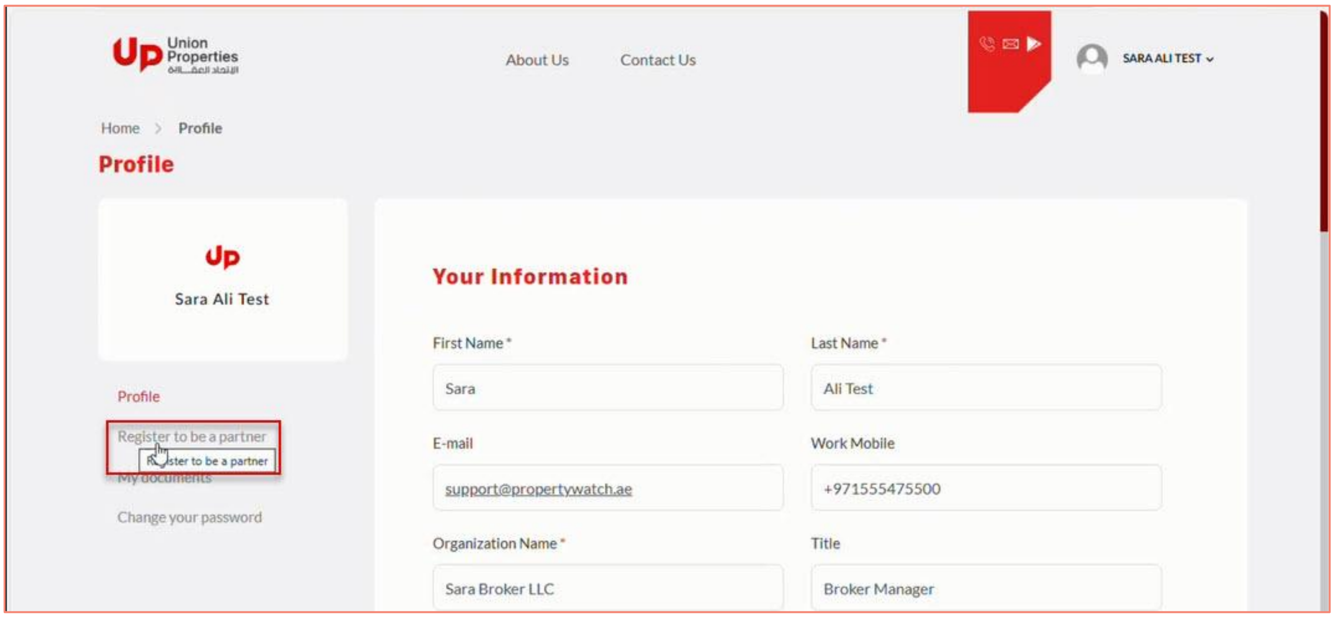

Figure 38 Accessing Register to be a partner

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

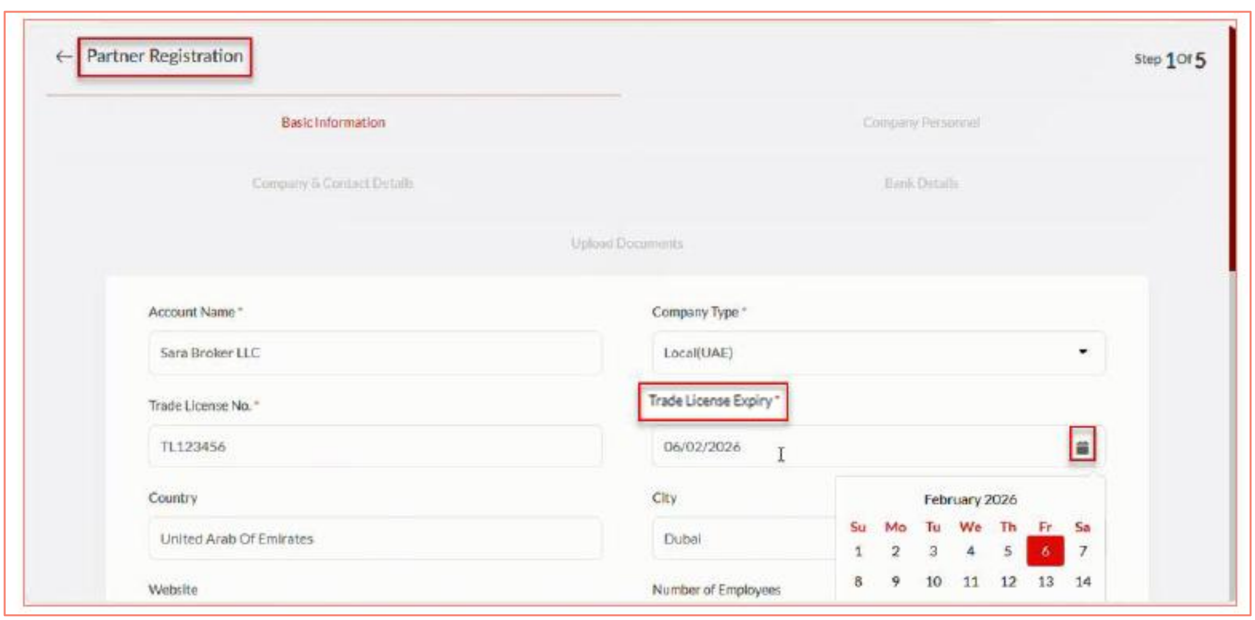

Figure 39 Updating License Expiry Date

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

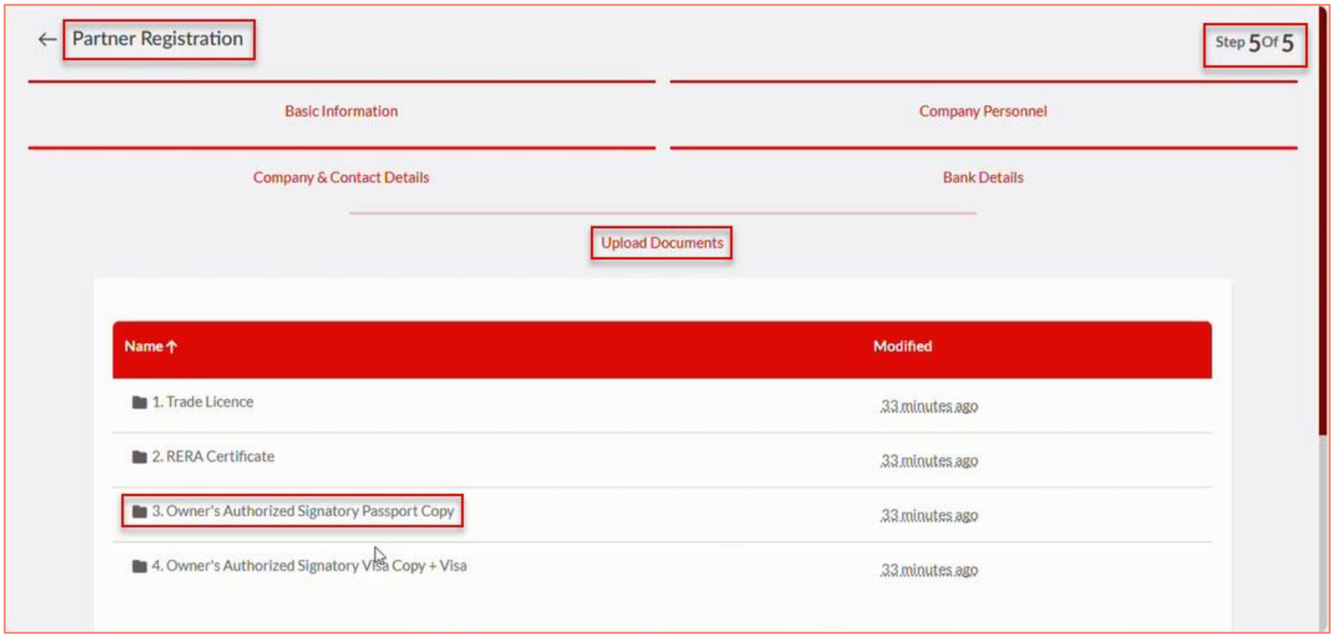

Figure 40 Upload Documents Page

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

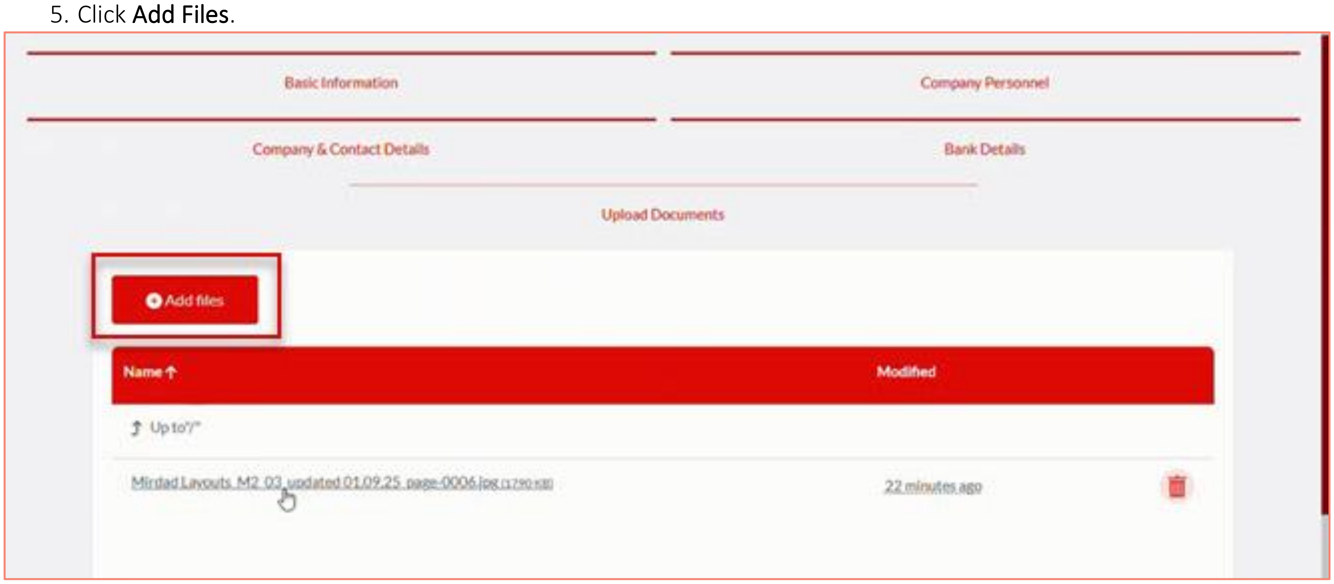

Figure 41 Clicking Add Files

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

7. Click **Add files** to upload the updated document.

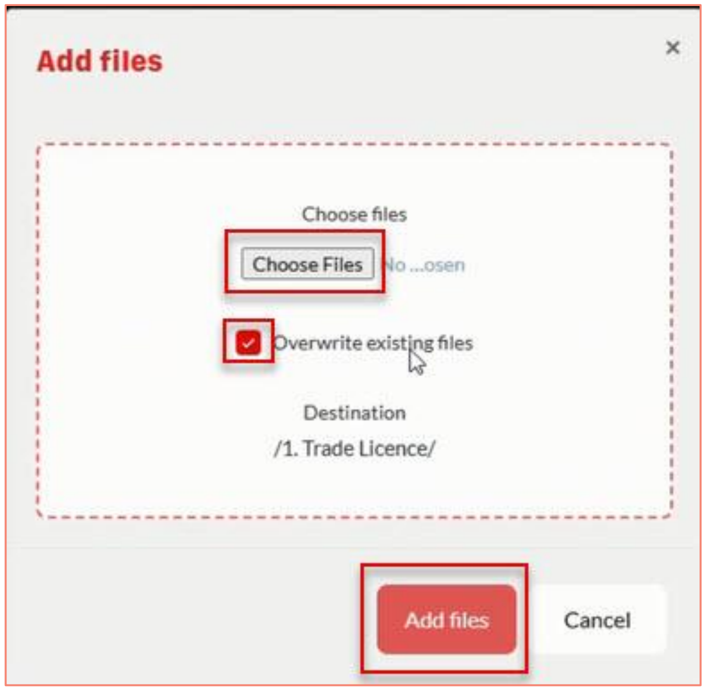

Figure 42 Add files Pop-up Dialog

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.

7. Company Information

The **About Us** page is a view-only section that provides general information about the company and the platform.

To view company information:

1. From the top navigation bar, click **About Us**.

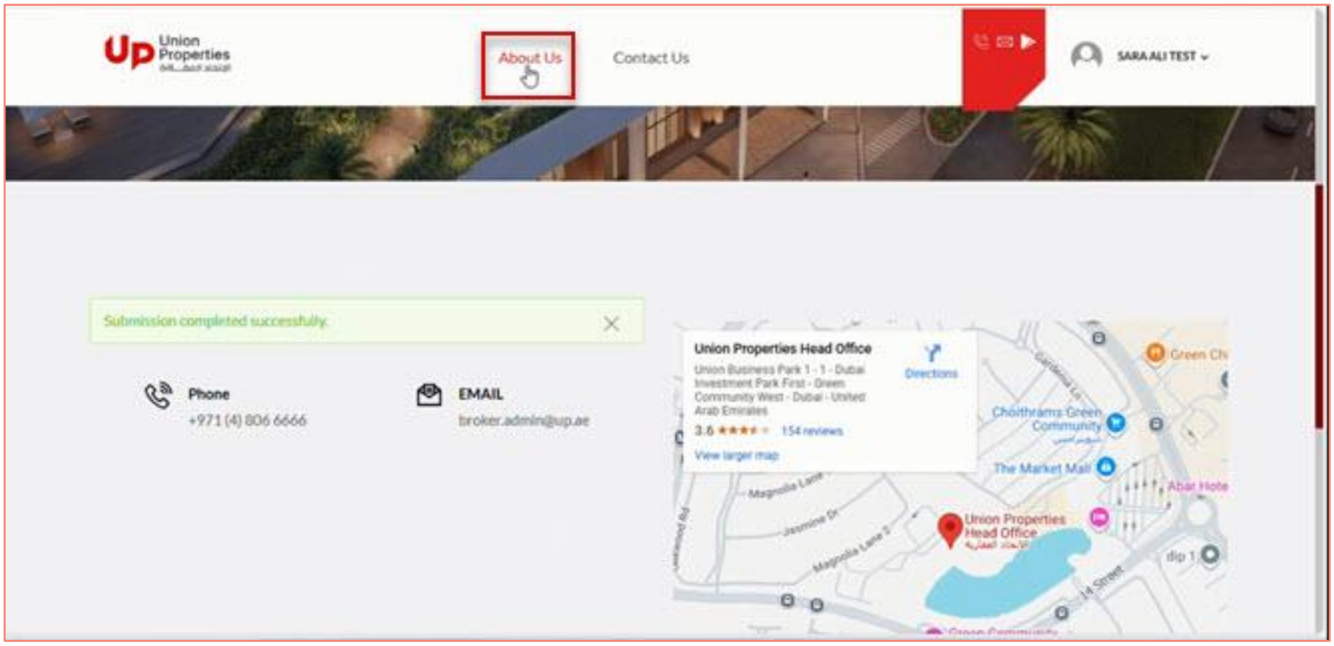

Figure 43 Clicking About Us

2. Review the displayed company overview and background information.

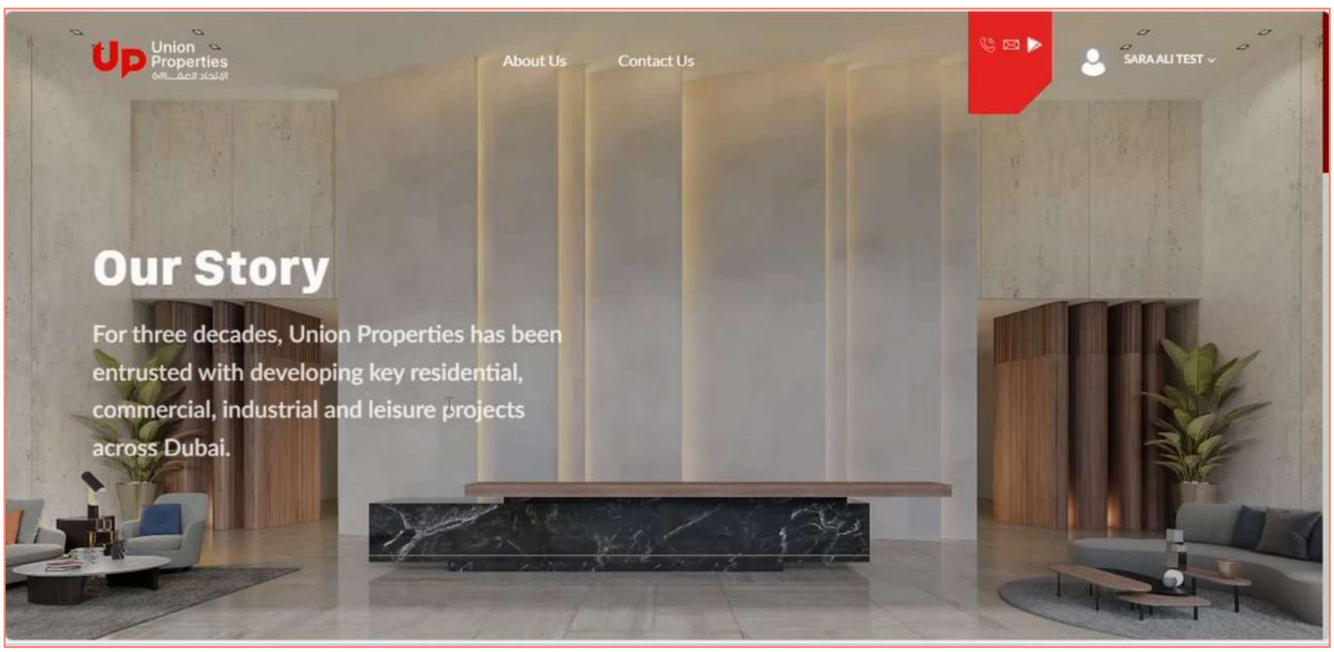

Figure 44 Company Information Page

8. Account Security

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

8.1 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.**

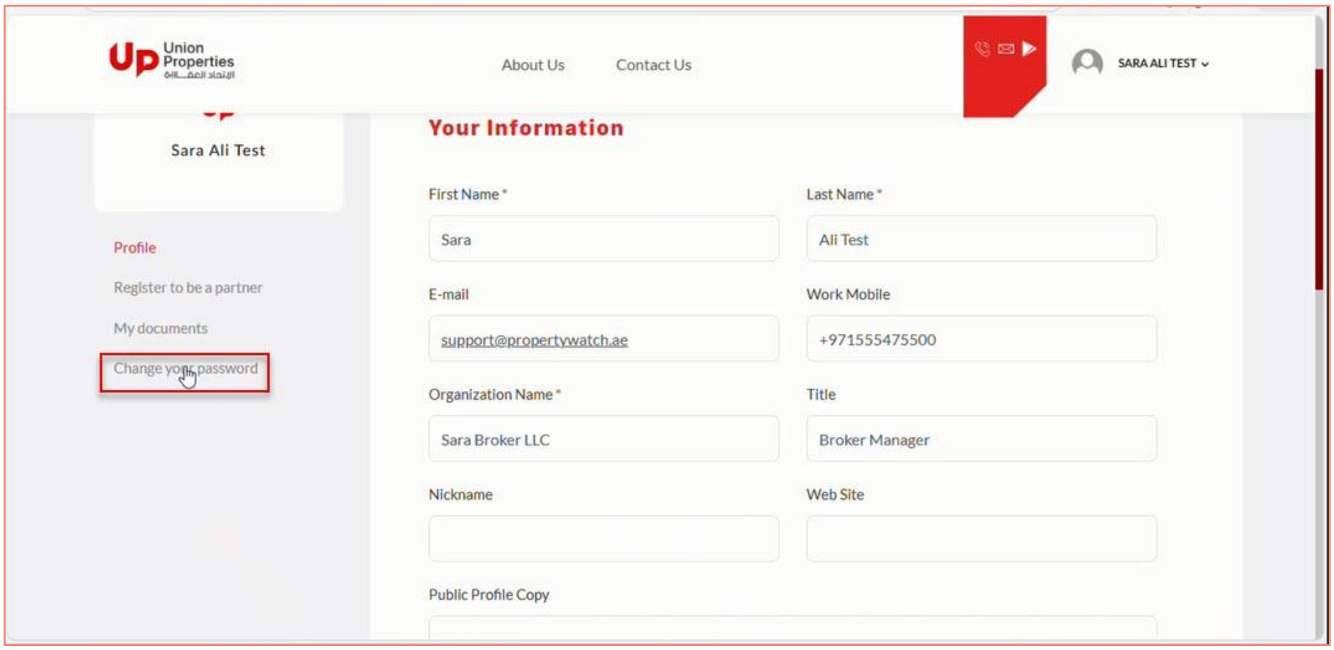

Figure 45 Change your password Option

2. In **Change your password** page, enter:
   - Old password
   - New password
   - Confirm new password

3. Click **Change Password to** save the changes.

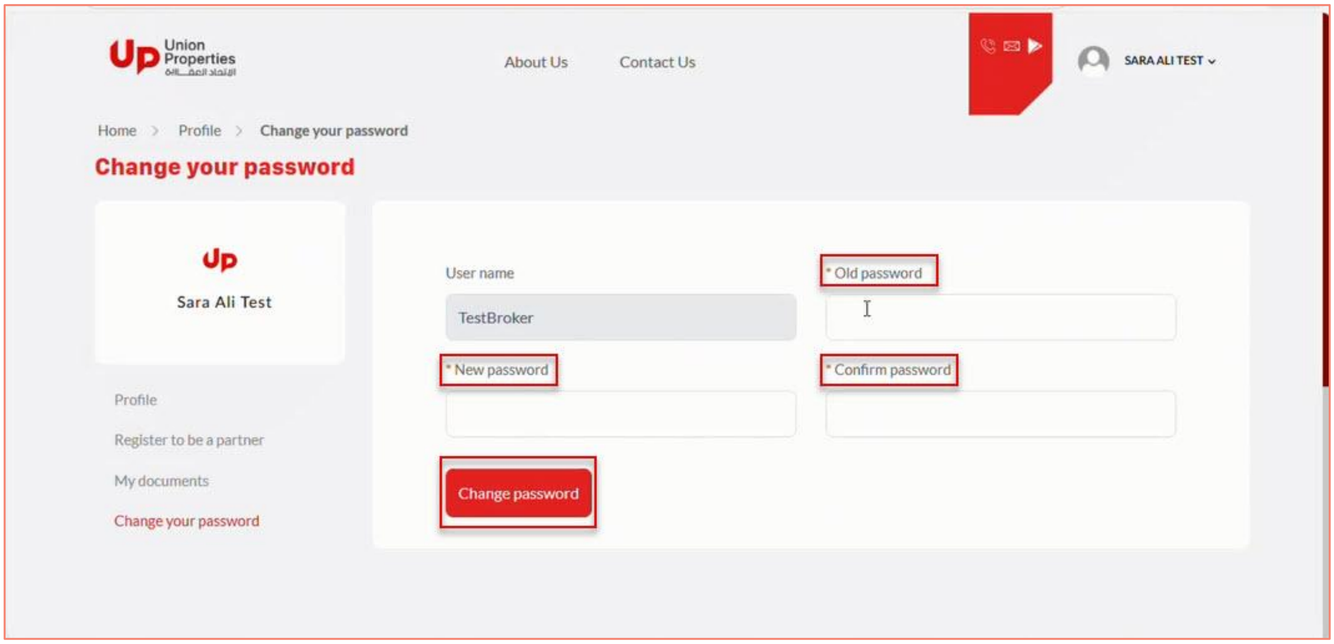

Figure 46 Change Password Page

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

8.2 Sign-Out

Brokers can securely end their active session using the **Sign Out** option.

To sign out:

1. Click the **user menu** in the top-right corner of the portal.
2. Select **Sign Out**.

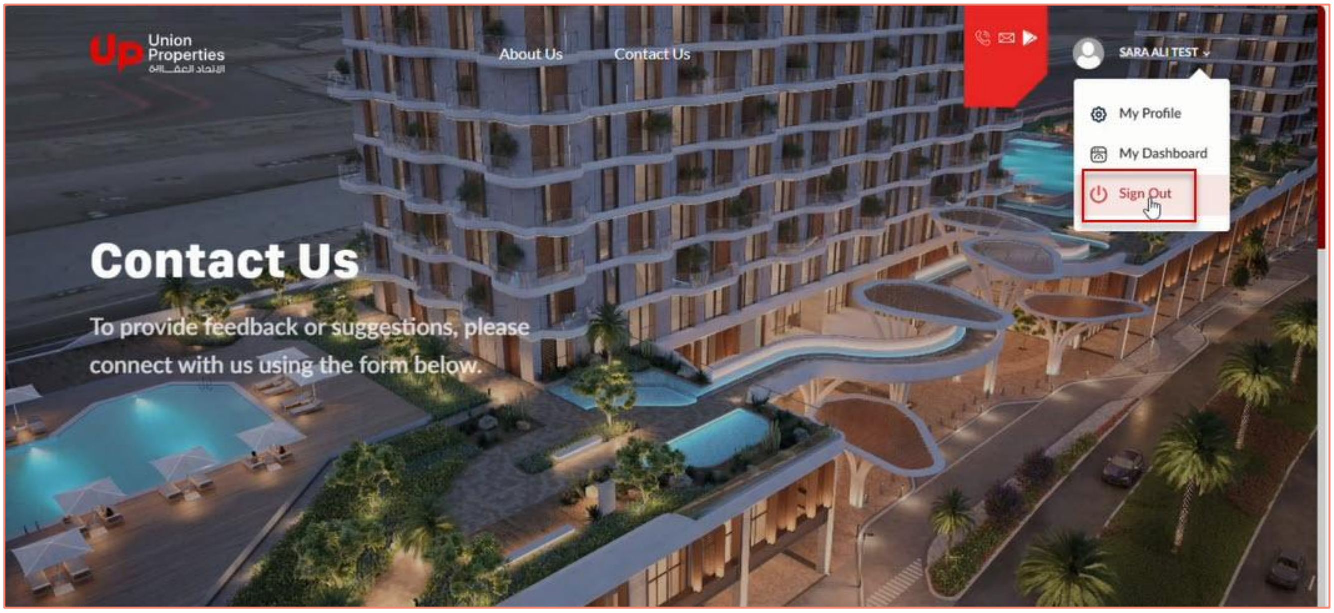

Figure 47 Sign Out option

The broker is logged out of the system and redirected to the public portal page.

9. Conclusion

This guide consolidates the essential workflows and access rules required for brokers to use the Broker Portal effectively, from registration and contract activation to dashboard access, case management, profile updates, document handling, and account security.

Designed as a clear operational reference, the guide ensures consistent broker operations, reliable data handling, and standardized support and communication processes. By following the procedures outlined, brokers can confidently manage their activities through the Broker Portal as the primary interface for engagement and support.