

# CondoApprove Documentation

## 1. Submitter Features:

### 1.1 Registering an Institution:

- Open the CondoApprove website
- Click Sign Up on the home page
- Select **Continue to Registration**

← Back CondoApprove

## Welcome to CondoApprove

Join our network of financial institutions and streamline your condo review process

### Institution Registration Process

Getting started is simple and straightforward

- Step 1: Register Your Institution**  
Provide your institution's basic information including name, address, and contact details. This helps us verify and set up your institutional account.
- Step 2: Create Admin Account**  
Set up your administrator account with secure credentials. This account will have the ability to manage orders and institutional settings.
- Step 3: Verification & Approval**  
Our team will review your application to ensure security and compliance. You'll receive notification once your account is approved and ready to use.
- Step 4: Start Ordering Reviews**  
Once approved, you can immediately begin ordering condo reviews, tracking progress, and managing your institutional workflow seamlessly.

[Continue to Registration](#)

- Enter **Institution Name, Institution Type, Address, City, State, Zipcode**

### Institution Admin Registration

Register your institution to manage condo reviews

**Institution Details**

**Institution Name \***

**Institution Type \***

**Official Address \***

**City \***

**State \***

**ZIP Code \***

- Enter **Institution Admin Name, Role, Phone Number, Email and Password**

Authorized Representative

**Full Name \***  **Title/Role \***

**Email \***  **Phone \***

---

Account Security

**Password \***  **Confirm Password \***

## 1.2 Logging In As Institution\_Admin

- Click Sign in from the homepage
- Enter your registered email and password
- Click Sign In

### Welcome back

Don't have an account? [Sign up](#)

**Email**

**Password**

[Forgot password?](#)

**Sign in**

- After logging in as an **Institution Admin**, you will be redirected to the dashboard screen shown below.

CondoApprove Welcome, [Admin](#) [Logout](#)

**Institution**  
Institution Dashboard

Overview **Users** Statistics

Total Orders  
**0**

Active Users  
**1**

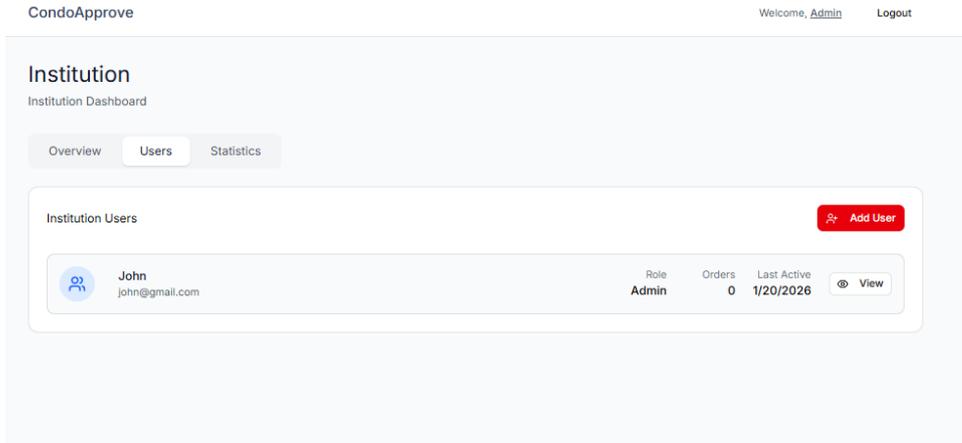
In Progress  
**0**

Completed  
**0**

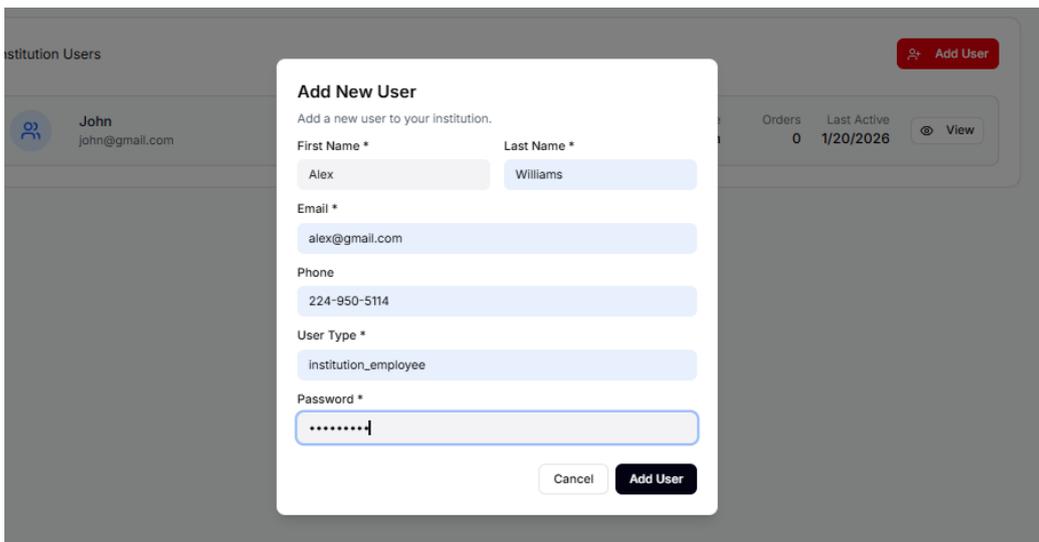
**Recent Activity**

No recent activity

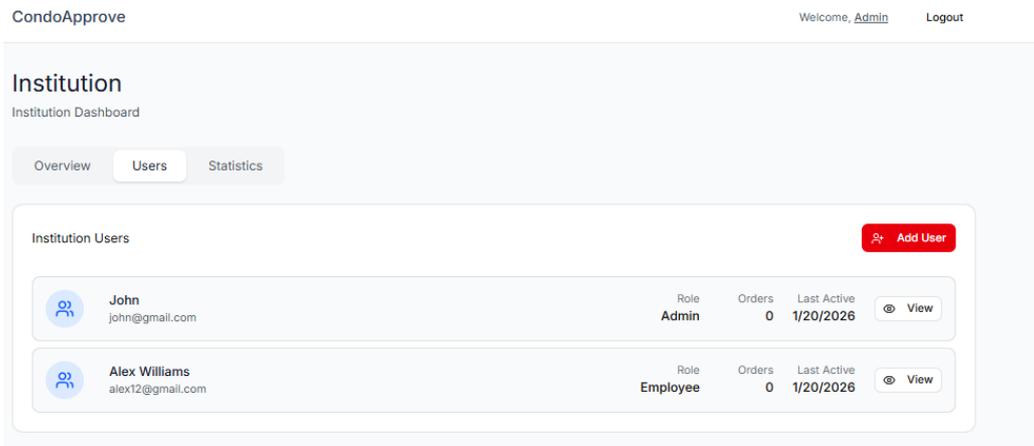
- To create an **Institution Employee**, navigate to the **Users** tab and click the **Add User** button.



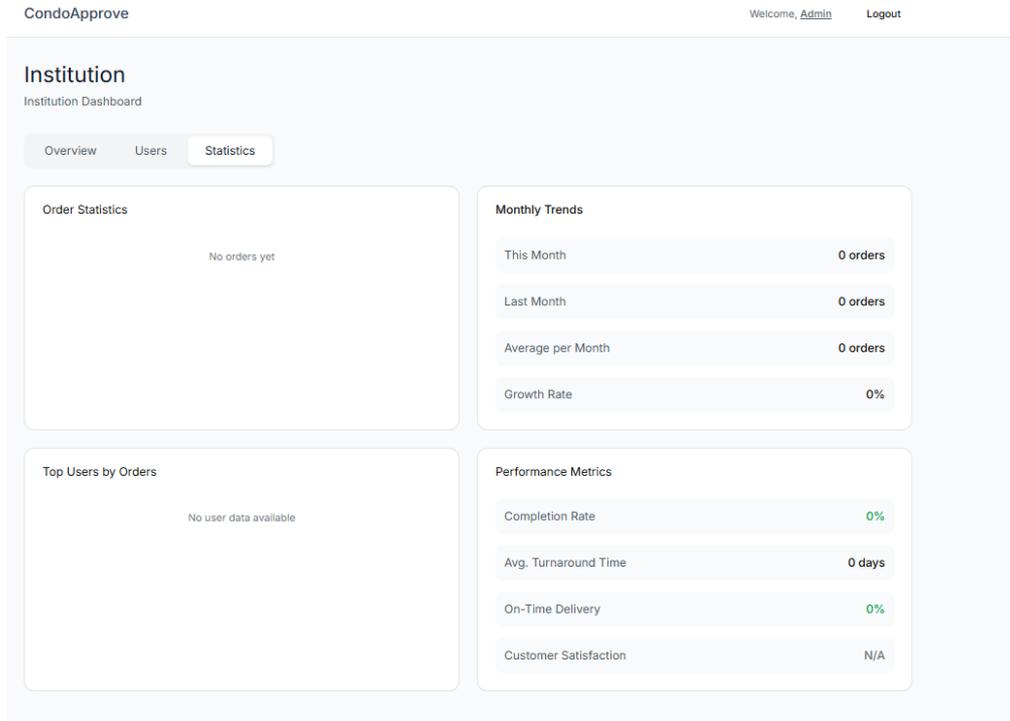
- Enter the **First Name, Last Name, Email, Password, and Phone Number**, then click the **Add User** button.



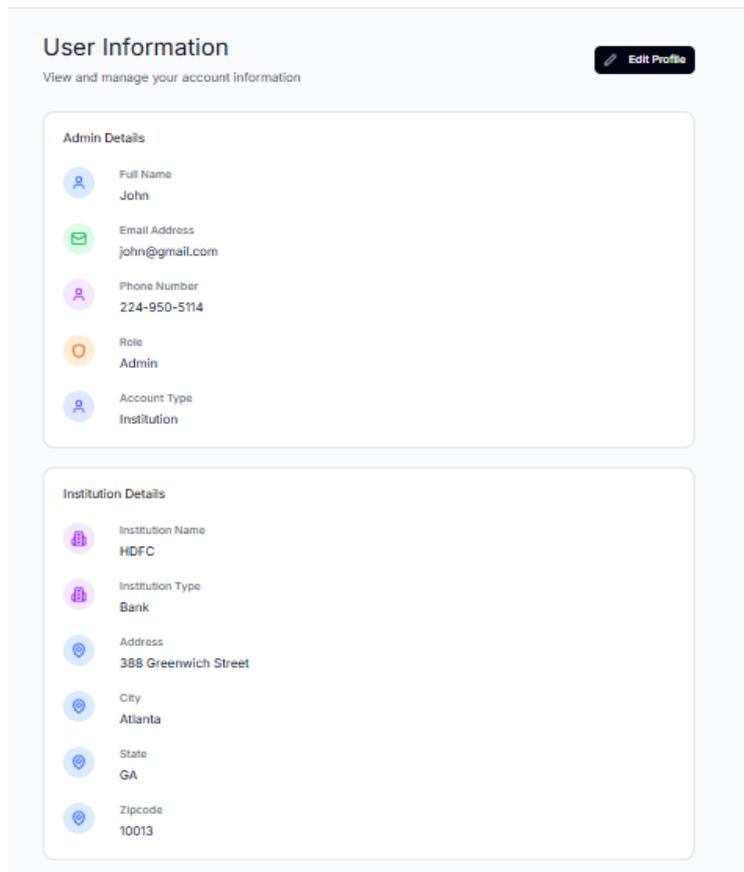
- The newly created employee will appear in the list shown here.



- In the **Statistics** tab, you can view **order statistics, top orders by user, monthly trends, and performance metrics.**



- To edit the institution or admin details, click on **Welcome Admin**, then select the **Edit Profile** button.



- After that, edit the required fields and click **Save Changes**.

The screenshot displays a 'User Information' form with the following sections and fields:

- Admin Details:**
  - Full Name: John
  - Email Address: john@gmail.com
  - Phone Number: 224-950-5114
  - Role: Admin
  - Account Type: Institution
- Institution Details:**
  - Institution Name: HDFC
  - Institution Type: Bank (dropdown menu)
  - Address: 388 Greenwich Street
  - City: Atlanta
  - State: GA
  - Zipcode: 10013

At the bottom of the form, there are two buttons: 'Cancel' and 'Save Changes'.

### 1.3 Logging In As Institution Employee

- Click Sign in from the homepage
- Enter your registered email and password
- Click Sign In
- After logging in as an **Institution Employee**, you will be redirected to the Service screen shown below.
- Select the preferred order from the available options and Click on Order.

<p><b>FCR</b></p> <p><b>Full Condo Review</b> Complete Package</p> <ul style="list-style-type: none"> <li>✓ Condo Data + Review</li> <li>✓ Custom Questionnaire</li> <li>✓ Governing Documents</li> <li>✓ Current Budget</li> <li>✓ Certificate of Insurance</li> </ul> <p><b>ORDER</b></p>	<p><b>LCR</b></p> <p><b>Limited Condo Review</b> Essential Package</p> <ul style="list-style-type: none"> <li>✓ Basic Assessment of Condo Project</li> <li>✓ Condo Questionnaire Review</li> <li>✓ Master Insurance Review</li> <li>✓ Basic Compliance check</li> <li>✓ Summary Report</li> </ul> <p><b>ORDER</b></p>	<p><b>FHA</b></p> <p><b>FHA Review</b> FHA Compliance</p> <ul style="list-style-type: none"> <li>✓ FHA Compliance Check</li> <li>✓ Custom Questionnaire</li> <li>✓ Governing Documents</li> <li>✓ Current Budget</li> <li>✓ Certificate of Insurance</li> <li>✓ Single Unit Analysis</li> </ul> <p><b>ORDER</b></p>
<p><b>CPR</b></p> <p><b>Co-op Project Review</b> Cooperative Analysis</p> <ul style="list-style-type: none"> <li>✓ Co-op Questionnaire review</li> <li>✓ Current years Financials review</li> <li>✓ Current Years Budget review</li> <li>✓ Master Insurance Review</li> <li>✓ Co-op Project Warrant</li> </ul> <p><b>ORDER</b></p>	<p><b>PERS</b></p> <p><b>PERS Review</b> Project Eligibility</p> <ul style="list-style-type: none"> <li>✓ PERS Compliance</li> <li>✓ Custom Questionnaire</li> <li>✓ Governing Documents</li> <li>✓ Financial Analysis</li> </ul> <p><b>ORDER</b></p>	<p><b>SDR</b></p> <p><b>Single Document Review</b> Targeted Document Assessment</p> <ul style="list-style-type: none"> <li>✓ Insurance Review only</li> <li>✓ Budget Review only</li> <li>✓ Litigation Review only</li> <li>✓ Reserve Study only</li> <li>✓ Basic assessment of single documents</li> </ul> <p><b>ORDER</b></p>

- After clicking Order, click Order Now to create the order.

### Limited Condo Review

A Limited Condo Review provides a streamlined analysis of essential condo project elements to determine eligibility under agency guidelines.

**Limited Condo Review Package**

- ✓ Basic Assessment of Condo Project
- ✓ Essential Insurance Review
- ✓ Compliance with applicable agency requirements

---

**ORDER NOW**

#### What's Included

- Review of Condo Questionnaire, HOA master insurance, and Appraisal if applicable.

#### Delivery Timeline

- Standard delivery: 9-10 days
- Rush delivery not available

[Have Questions?](#)

[View All Services](#)

- Fill in the **order details form**, then click **Proceed to Payment** to complete the payment.

**Limited Condo Review Order**  
Please fill in the project details below

**Loan Information**

Loan Number	Borrower's Last Name	Date Requested
<input type="text" value="Enter loan number"/>	<input type="text" value="Enter last name"/>	<input type="text" value="dd-mm-yyyy"/>

**Property Information**

Project Name \*

Property Address \*

City *	State *	Zip Code *
<input type="text" value="Enter city"/>	<input type="text" value="Enter state"/>	<input type="text" value="Enter zip code"/>

**HOA & Project Details**

HOA Contact Name	HOA Phone Number
<input type="text" value="Enter contact name"/>	<input type="text" value="(555) 555-5555"/>

Total # of Units

**Ready to proceed?**  
Next, you'll complete your payment and then upload the required documents.

[Proceed to Payment →](#)

- To make the payment, click the **Continue to Stripe Checkout** button.

### Order Summary

Review Type: **Limited Condo Review**

Project Name: **Real - state**

Property Address: **388 Greenwich Street,  
New york, NY 10013**

Loan Number: **12345**

Borrower: **Smith**

Total Units: **12**

---

**Total Amount: \$400**

### Secure Payment via Stripe



**Secure Checkout**

Click the button below to be securely redirected to Stripe's checkout page where you can complete your payment.

- ✔ **Secure Payment Processing**  
Your payment is processed securely by Stripe
- ✔ **Multiple Payment Options**  
Credit card, debit card, and more
- ✔ **Encrypted & Protected**  
PCI DSS compliant security standards

✔ You will be redirected to a new page to complete your payment. After successful payment, you'll return here to upload your documents.

[Continue to Stripe Checkout - \\$400](#)

By clicking continue, you'll be redirected to Stripe's secure payment page

- This will redirect you to the **Stripe Checkout** page. Enter your card details and click **Pay**.

TEST MODE

Choose a currency:

₹ 37,762.57

\$ 400.00

1 USD = 94.4064 INR (includes 3.75% conversion fee)

Order eed950e8-1a21-4995-ba34-2188947b3998 ₹37,762.57

**link**

Email

---

**Enter payment details** Cancel

**Card information**

VISA

**Cardholder name**

**Country or region**

▼

10013

This payment method will be saved to Link.

[Pay](#)

- Upload the necessary documents, then click **Complete Order** to finalize the process.

**Upload Documents**  
Upload documents organized by category. You can upload multiple files to each category folder.

**Condo Questionnaire** Required  
Completed condo questionnaire form

Choose Files  
or drag and drop files here  
Supported: PDF, DOC, DOCX, JPG, PNG (Max 10MB per file)

**HOA Master Insurance Policy** Required  
HOA master insurance policy document

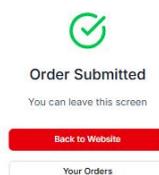
Choose Files  
or drag and drop files here  
Supported: PDF, DOC, DOCX, JPG, PNG (Max 10MB per file)

**Appraisal**  
Appraisal document if there is no PIW

Choose Files  
or drag and drop files here  
Supported: PDF, DOC, DOCX, JPG, PNG (Max 10MB per file)

Total files: 0 Back Complete Order

- Once the order is complete, click **Your Orders** to view the **Your Orders** screen.



- The **Your Orders** screen displays all submitted orders along with their current status, such as **Pending Review**.

← Back CondoApprove Welcome, alex12 [Logout](#)

## Your Orders

Manage and track your condo review orders Create New Order

All Orders
Review In Progress
Awaiting Additional Documents
Pending Review
Rejected
Completed

**Real - state**

📍 388 Greenwich Street, New york, NY 10013

Limited Condo Review for Real - state

📄 Limited Condo Review   📅 Due: 1/22/2026   ⌚ Ordered: 1/20/2026   💰 \$400

Order #ORD-EE9D58E8   • Waiting for reviewer assignment

⌚ Pending Review

View Details

- Click the **View Details** button to access the full information of the order.

Order #ee9d58e8-1a21-4995-ba34-2188947b3998

LIMITED\_CONDO\_REVIEW

PENDING\_REVIEW  
 Submitted: 1/20/2026

**📄 Loan Information**

Loan Number  
**12345**

Borrower's Last Name  
**Smith**

Date Requested  
**1/22/2026**

**📄 Property Information**

Project Name  
**Real - state**

Address  
**388 Greenwich Street**

City  
**New york**

State  
**NY**

ZIP Code  
**10013**

Property Type  
**Condo**

**👤 Contact Information**

Name  
**Alex Williams**

Email  
**alex12@gmail.com**

Phone  
**224-950-5114**

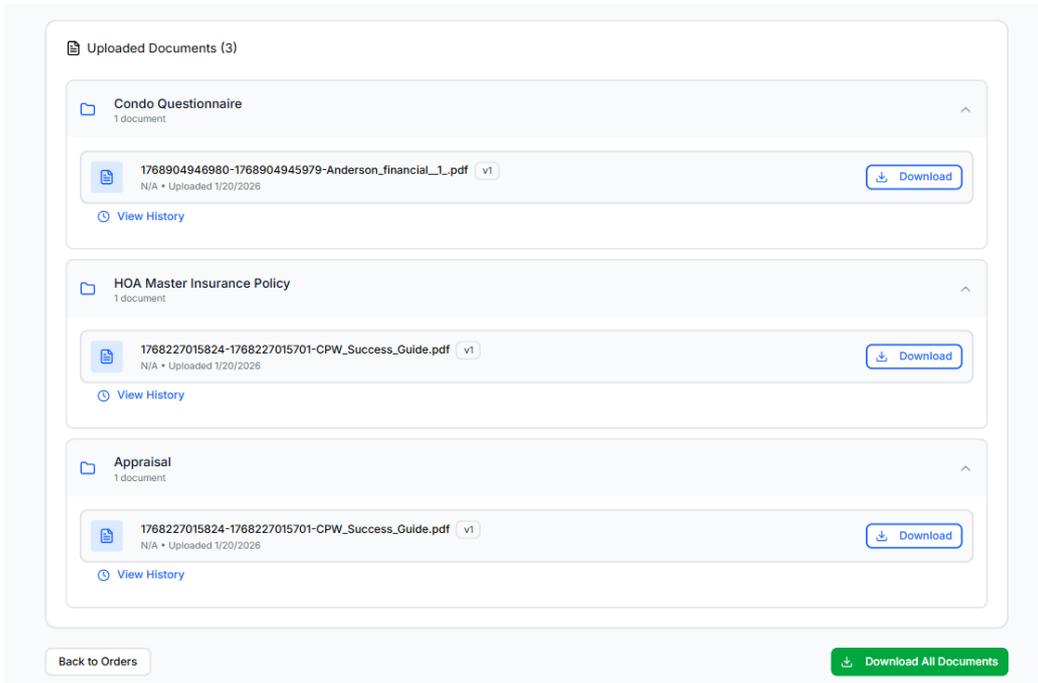
**📄 HOA & Project Details**

HOA Contact Name  
**Alice**

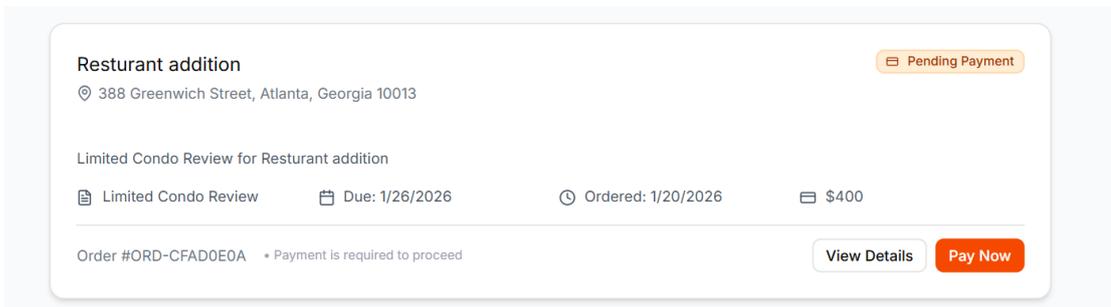
HOA Phone Number  
**224-950-5114**

Total Units  
**12**

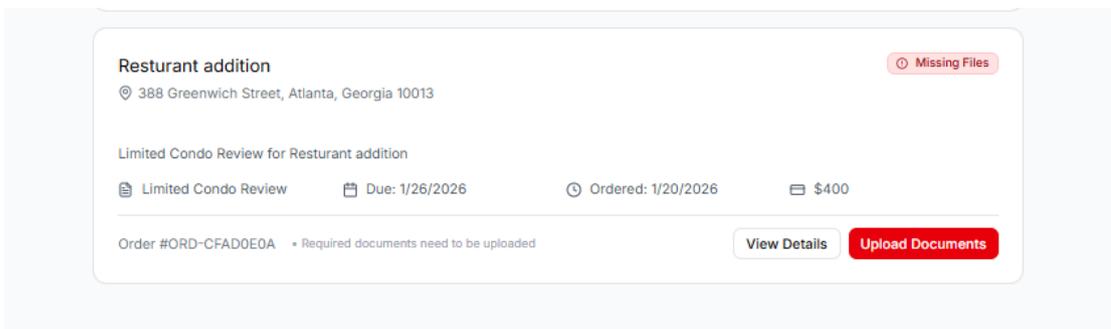
New Construction  
**No**



- In case the payment was not made earlier, the order will be listed as **Pending Payment** in the **Your Orders** screen. To proceed, click **Pay Now** to complete the payment, and then upload the necessary documents following the previously mentioned steps.



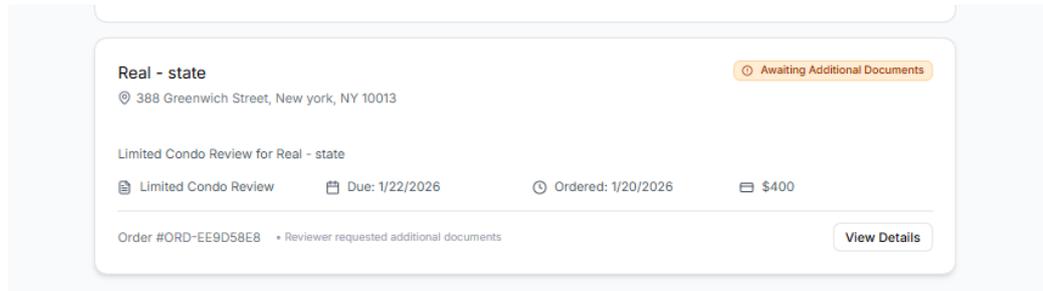
- If the payment has been completed but the required documents were not uploaded, the order will appear as **Missing File**. Click **Upload Documents** to provide the necessary files and finalize the order.



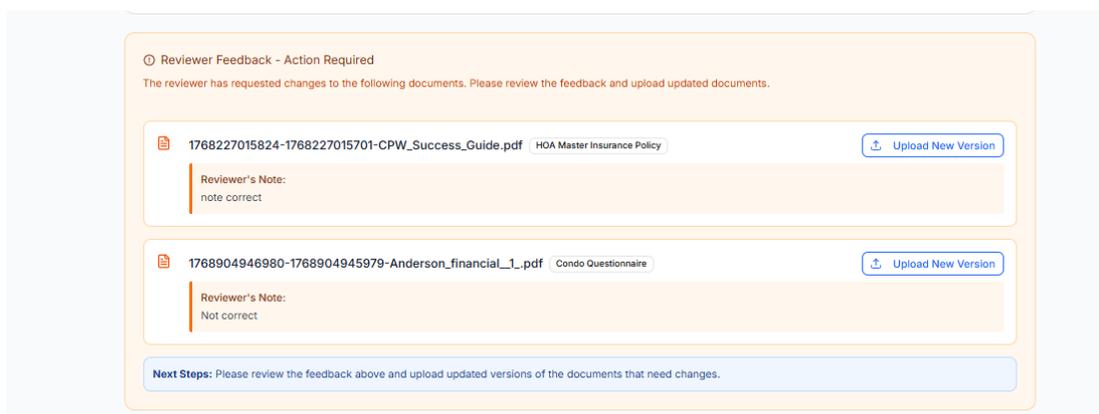
## 2. Submitter side Features—after the review

### 2.1 Logging In As Institution Employee

- Click Sign in from the homepage
- Enter your registered email and password
- Click Sign In



- Click **View Details**, and on this screen, you can see the reviewer's comments and also have the option to **re-upload the document**.



- Click the **Upload New Version** button to re-upload the document. The previous version can be viewed by clicking the **View History** button.

