Dox AI
Asset Verification
formerly Verimoto
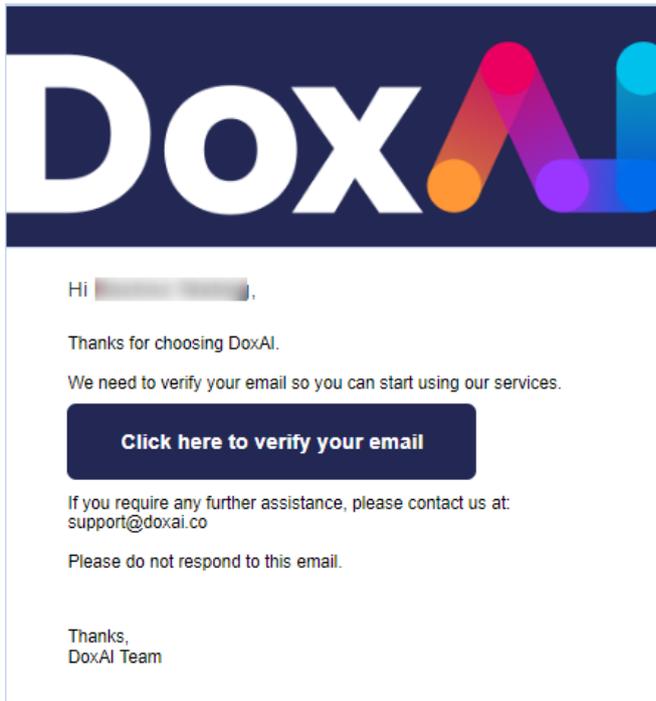
BROKER USER GUIDE

Version 1.2

Contents

Onboarding

1. Visit [DoxAI](#) and click on "Sign-up".

2. Provide your first name, last name, valid email and create a password to sign up.
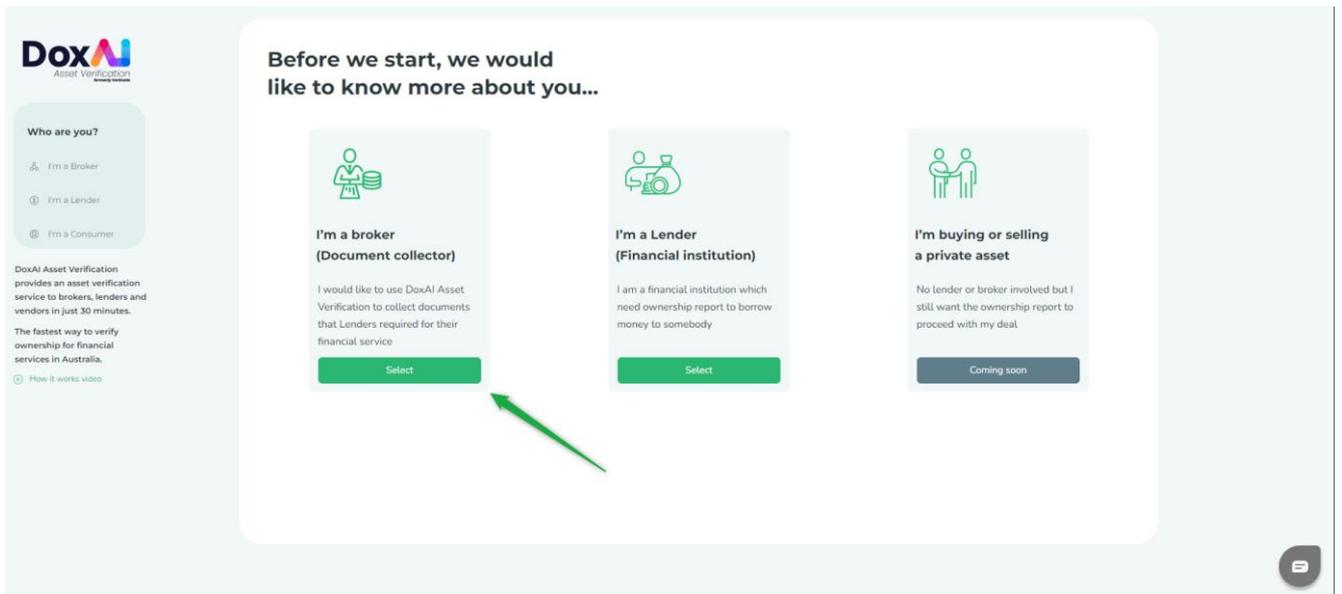
3. Activate your account by clicking the link sent to the email address provided for signup.

4. Login and proceed to launch Asset Verification from the DoxAI dashboard.
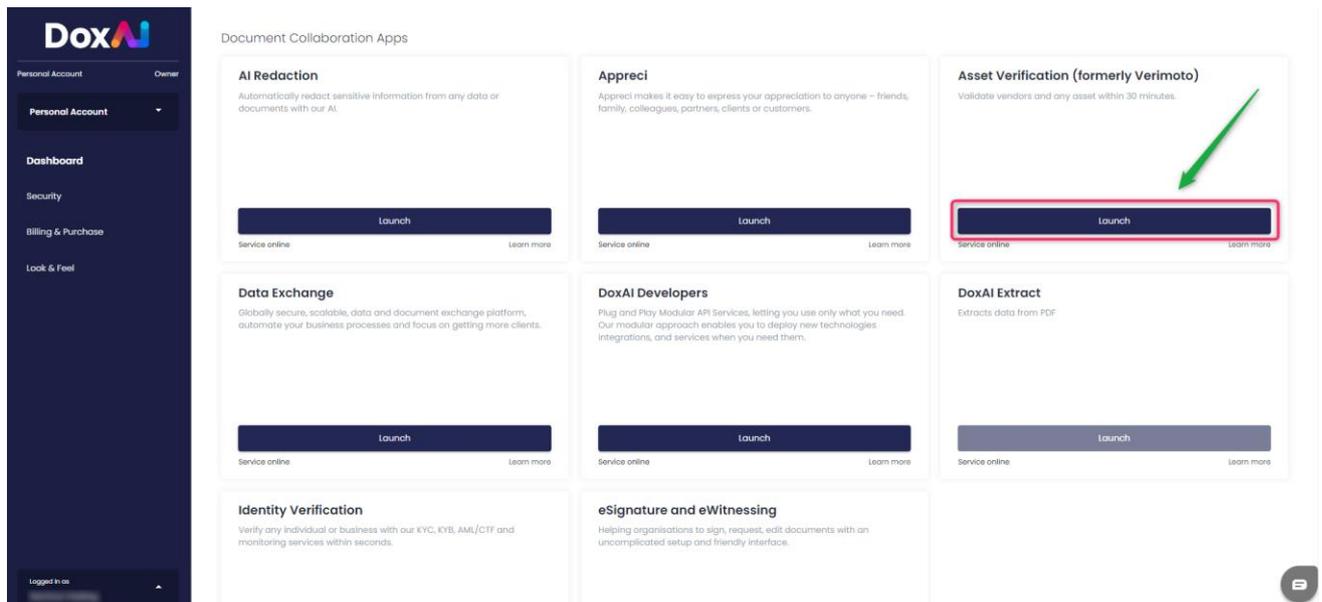
5. Select "I'm a broker".

6. Provide your details and go to next step.
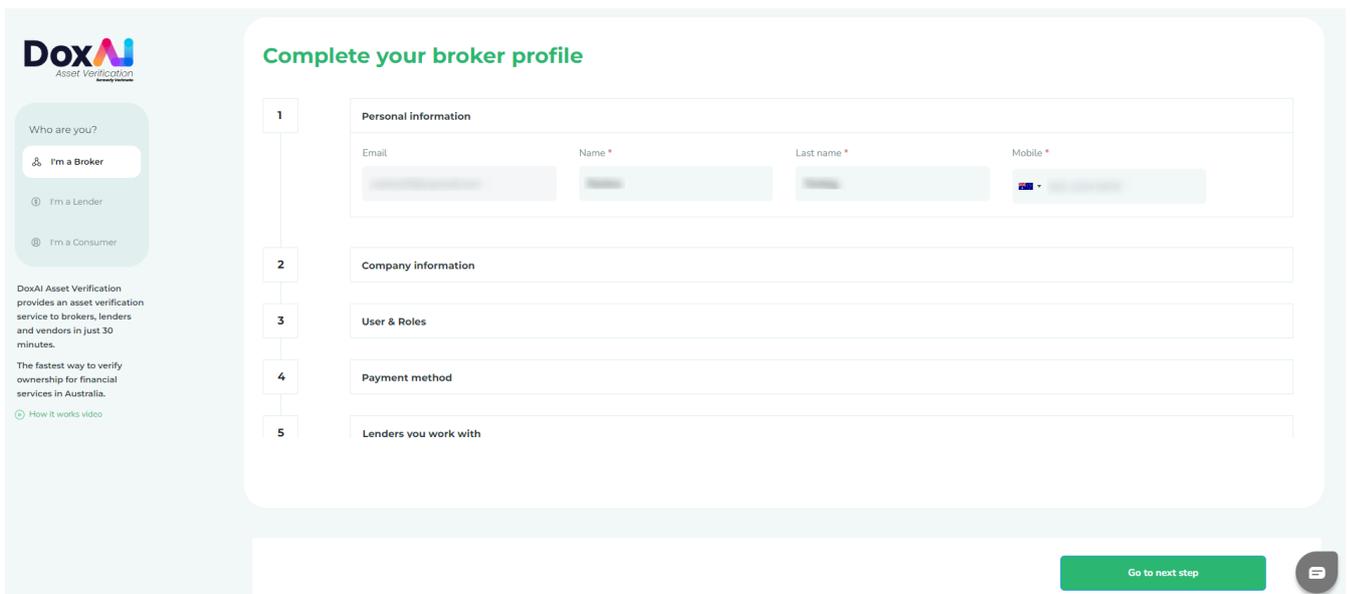
7. Verify your mobile number with a valid one-time pin and proceed to the next step.

Verify Your Mobile Number

Please verify your mobile number to register & get started

Mobile

Get OTP

Verify Your Mobile Number

Please verify your mobile number to register & get started

Mobile   +61 435 740 286

OTP   657762

Resend OTP   Verify OTP

8. After providing your details you can either join an existing Broker company OR Set-up a new company.

   a. Joining an existing company
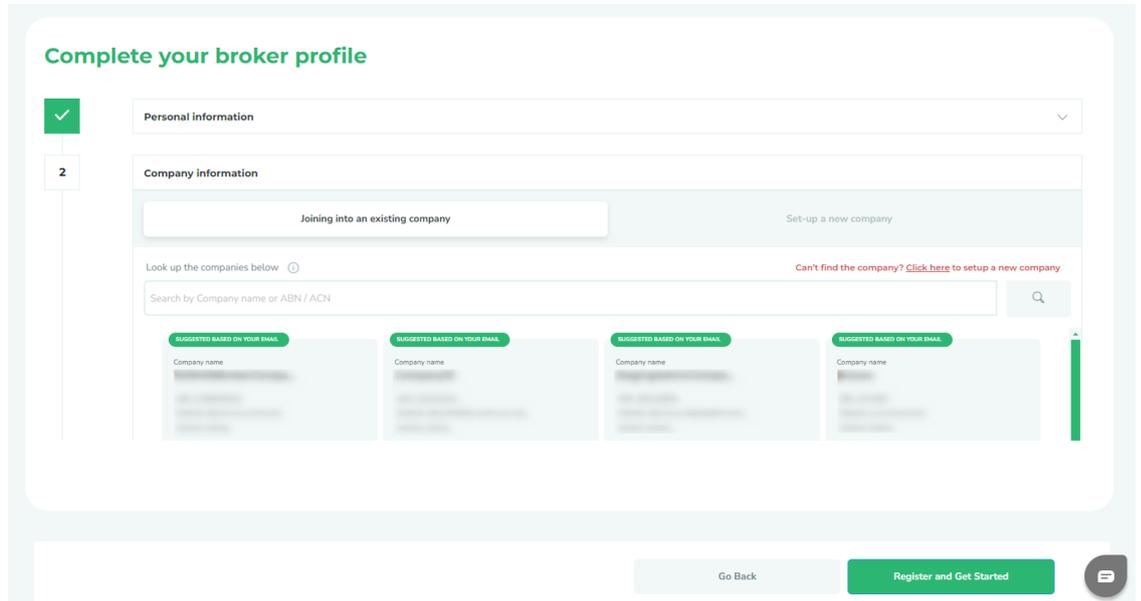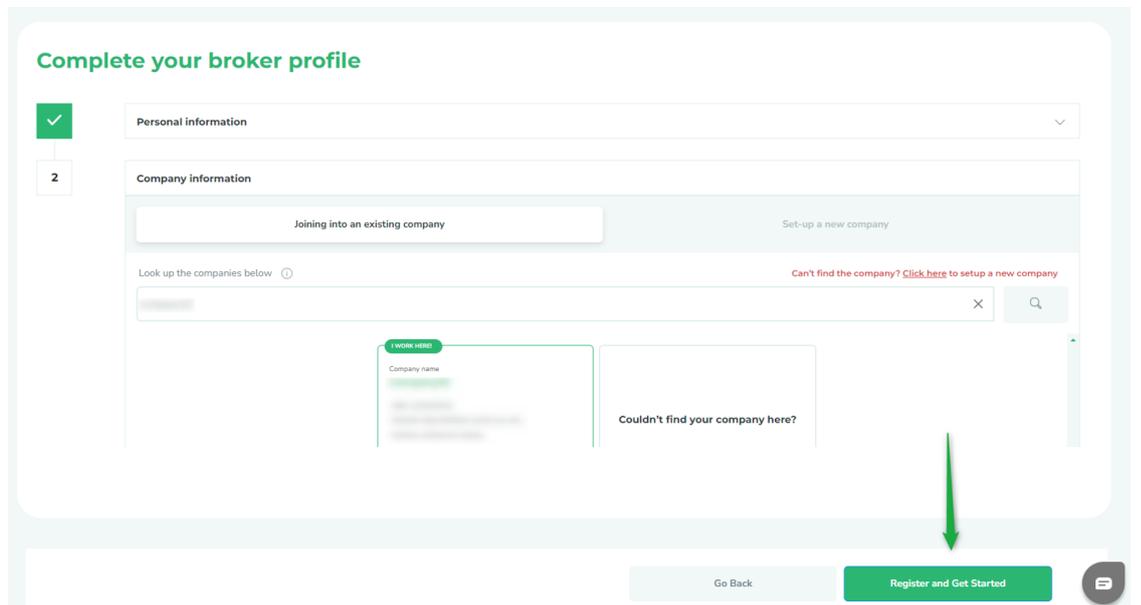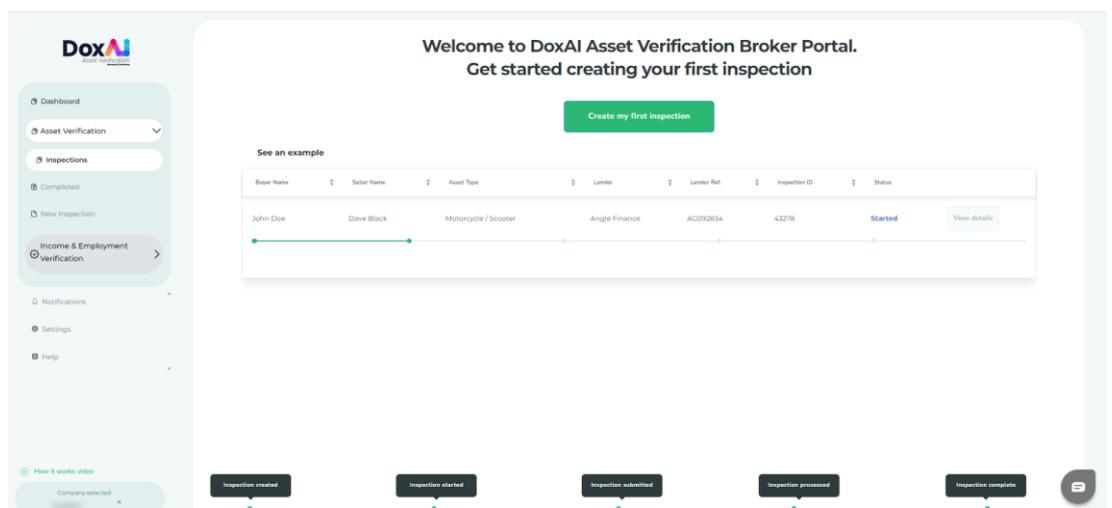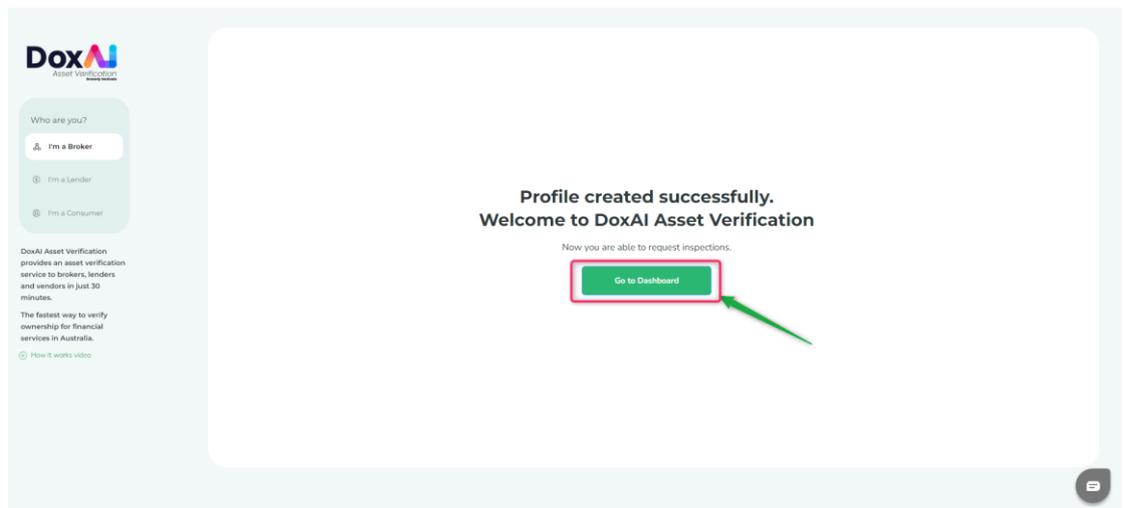
   i. Select "Joining into an existing company".

   ii. Search your company name.

   iii. Select the company and click "Register and Get Started".

iv. Click "Go to Dashboard" and get started to create your first inspection.

b. Set-up a new company

    i.   Click on "Set-up a new company".

    ii.   Provide the company details and verify the ABN.

    iii.   Click on "Go to next step".

    iv.   Add users (other brokers from your company) and assign them roles:

- Provide the user email and assign role(s) to the user (Admin, Billing, Primary contact) and click "Add User" button.
- **Admin**: Will have overall access to the portal. Admin can add/delete users, create inspections. There can be more than 1 admin user of a company.
- **Billing**: Will have access to add/view/delete the payment methods and create inspections. Only one user can become billing responsible.
- **Primary contact**: Primary escalation contact for support and queries. Only one user can be a primary contact. This user will have all access to all portal features except payment section and will get contacted by support team in case of any query arises.

NOTE: If no role is assigned to a broker, the broker will act as a simple broker (i.e. only create inspections).

v. Added user will get invited via the provided email and can onboard to your company on the DoxAI Asset Verification portal.

vi. Add a payment method: Provide valid card details, add it by clicking the + button, and go to next step.

vii. Select the lenders you work with.

viii. Select the assets you work with.

ix. Register and get started.
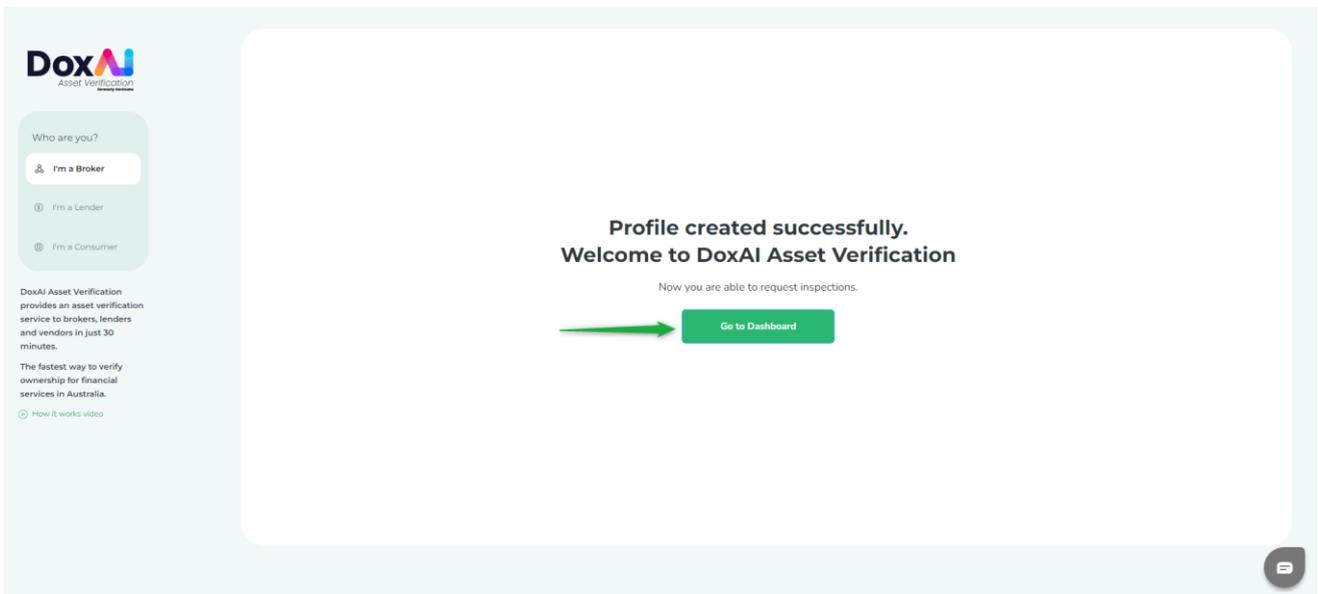
Create an inspection

1. Click on "New inspection" OR "Create my first inspection".
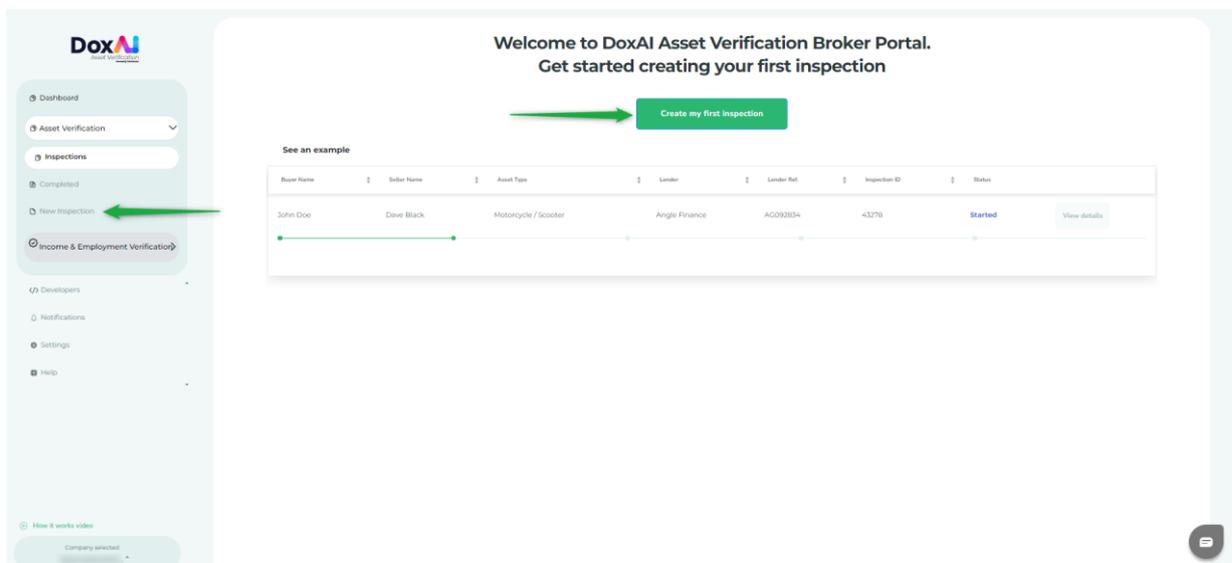
2. Provide Seller details, Buyer details (optional) and select the Lender, Asset, State and Inspection type. Provide the **deal/loan/lender reference number**.

Inspection detail

Seller first name *

Seller last name *

Seller e-mail * (Optional according to Lender)

Seller Mobile *

Buyer first name (Optional)

Buyer last name (Optional)

Buyer e-mail (Optional)

Buyer Mobile (Optional)

Lender *

Asset *
Motor Vehicle

State *
NSW

Inspection type *
New Lending

Lender reference *

Cost Details
For Private Sale Invoice Generation

Assets Cost Price ($)	Less Deposit ($)	Total ($)
$ 500000	$ 20000	$ 480000

Payment method
Select a payment method

Save & Update

Lender defined documents list will be collected from the seller. For inspections with "No lender", you can customise the inspection by selecting the required documents within each section.

You can also share the inspection with other brokers from your company.

Share this inspection with brokers from same company

Search by Name, Surname, E-mail or Mobile number

Save & Update

DoxAI
Asset Verification
formerly Verimoto

Meaning of different status of the inspection:

Meaning of different status of the inspection:

- **Created:** After the inspection has been created by the broker.
- **Started:** After the seller has provided the 6-digit OTP in the web app and progressed to upload the documents.
- **Submitted:** After the seller has uploaded and submitted all the documents via web app.
- **Completed:** After the support team completes the document review and generates the report.
- **Rejected:** If the support team rejects any document submitted by the seller.
- **By-passed (for No-lender inspection)**: If the support team has rejected any document but the broker has requested to bypass it and accept the same document.
- **Cancelled:** After the initiator cancels an Inspection from the "Edit inspection" tab.
- **Suspended:** After the support team suspends any inspection based on the request from the initiator.

View inspection details and progress
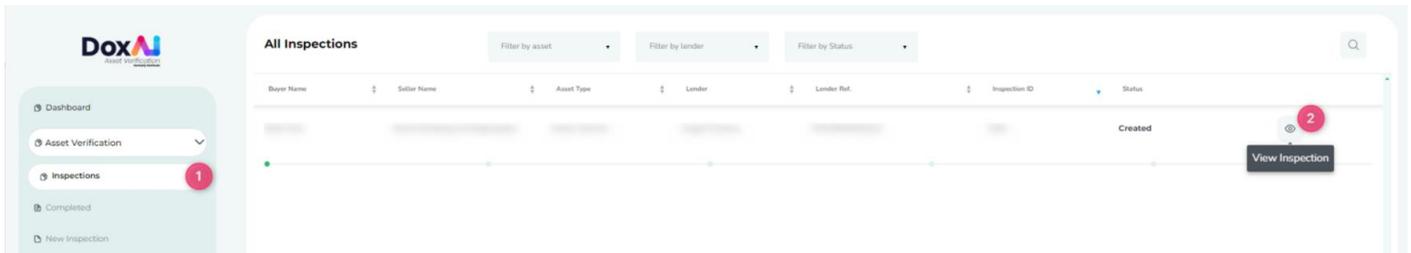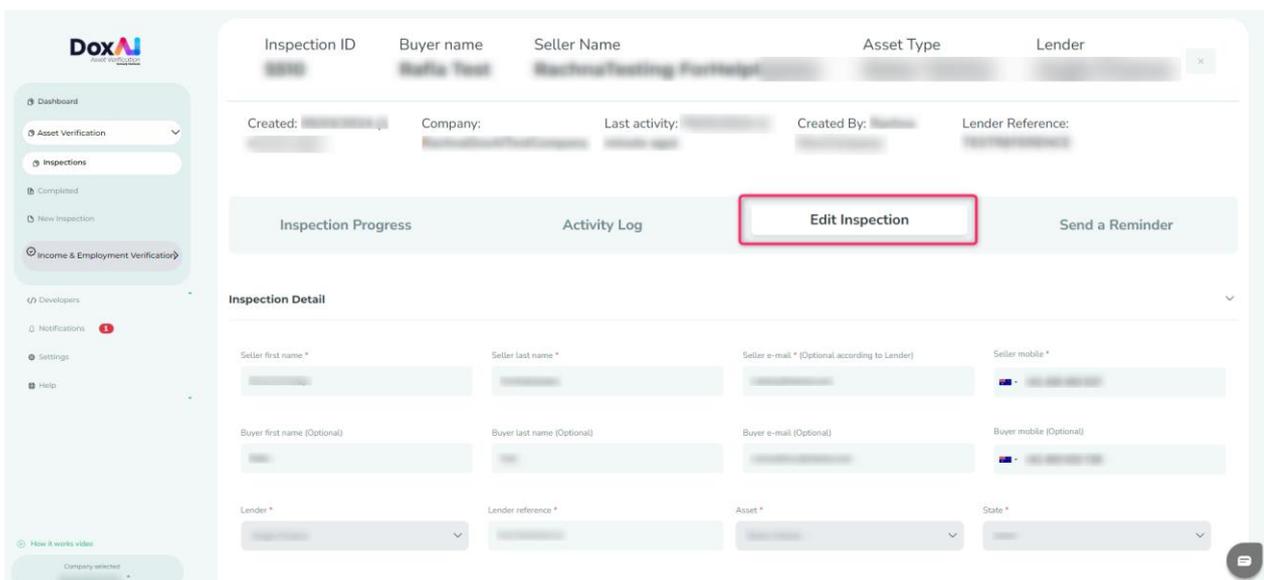
Go to "Inspections" and select "View Inspection".
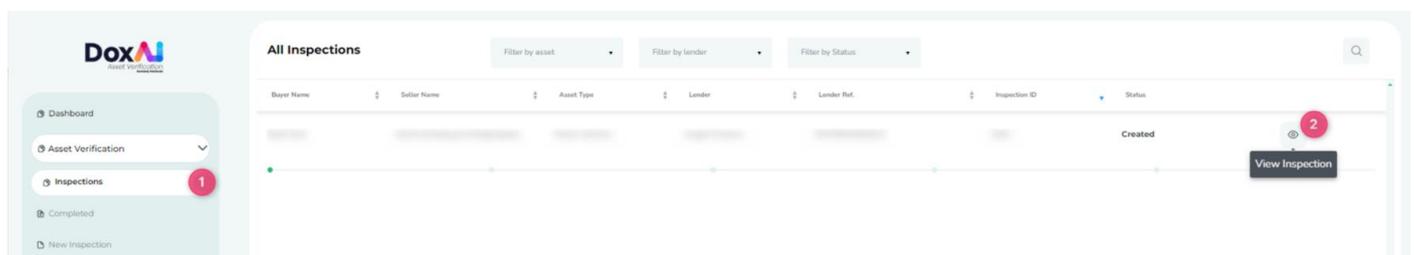
In "View Inspection" you can track the Inspection progress, view the Activities on the inspection along with timestamp (Activity log), Edit Inspection, and Send a reminder to the seller email.

Edit an inspection

Go to "Inspections" and select "View Inspection".

In "View Inspection", click on "Edit Inspection". Using "Edit Inspection" feature, you can the edit Seller first name, Seller last name, Seller email, Seller mobile, State, Buyer first name, Buyer last name, Buyer e-mail, Buyer mobile, till the inspection is in "Created" status. You can also edit and update the lender reference until the inspection is not completed.
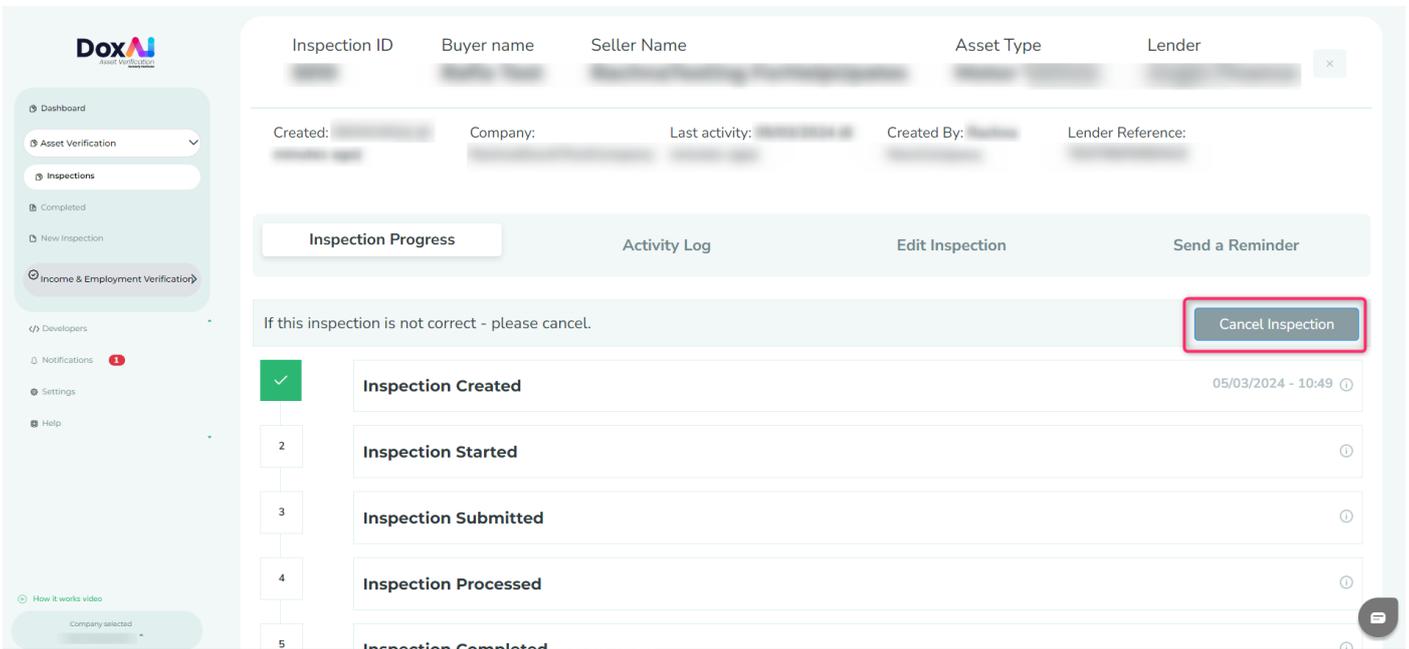
Cancel an inspection

Go to "Inspections" and select "View Inspection".
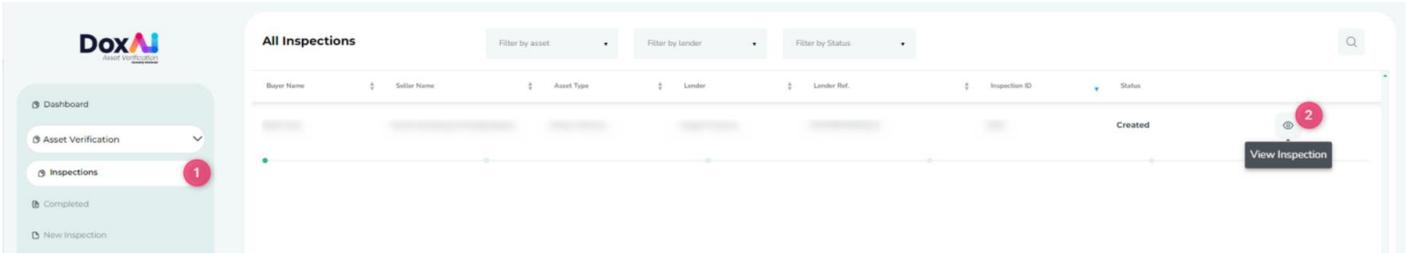
In "View Inspection", from Inspection Progress tab, you can cancel the inspection if the inspection is in "Created" status.

When you click on "Cancel Inspection," you have two options: you can either proceed to cancel the inspection or choose to "Recreate" it with the same details. If you select "Confirm," the respective inspection will be canceled outright. However, if you opt to "Recreate," the previous inspection will be canceled, and a new inspection form will

open with the same details pre-filled for your convenience to edit.
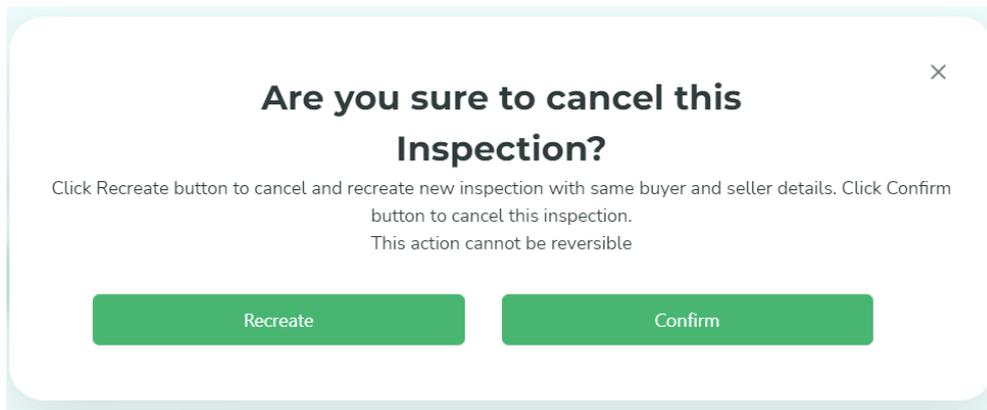
View rejected documents, notify seller or request bypass
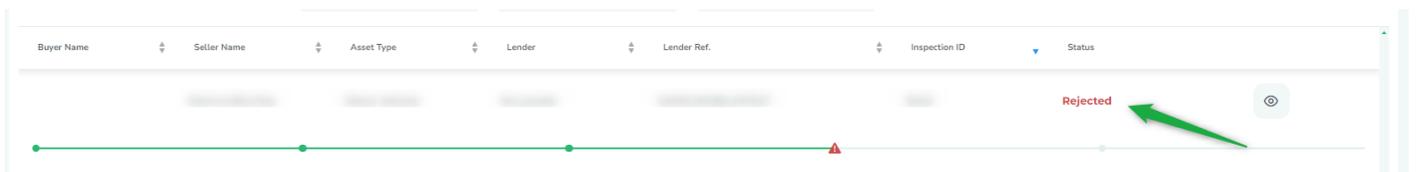
If any of the seller's uploaded documents get rejected, the seller of the inspection will get notified and the respective inspection will have "**Rejected**" status.

Click the "**View Inspection**" button next to the rejected inspection to review the rejected documents and various options available to you.


To send a customized message to the seller's email, use the "**Notify Seller**" button.

If you need to request bypass for a rejected document, click "**Bypass**" and provide the reason for the bypass request. Once the lender approves this request, the support team will process the document.

For a **no lender inspection**, follow the same steps to request the support team to bypass a rejected document, mentioning the reasons.

If the bypass option is not available for an inspection created for a specific lender, to request the support team to bypass a rejected document, broker must share respective Lender's approving authority approval with us at support@doxai.co.
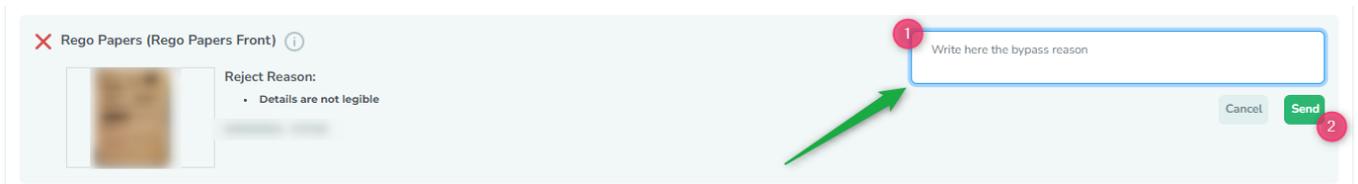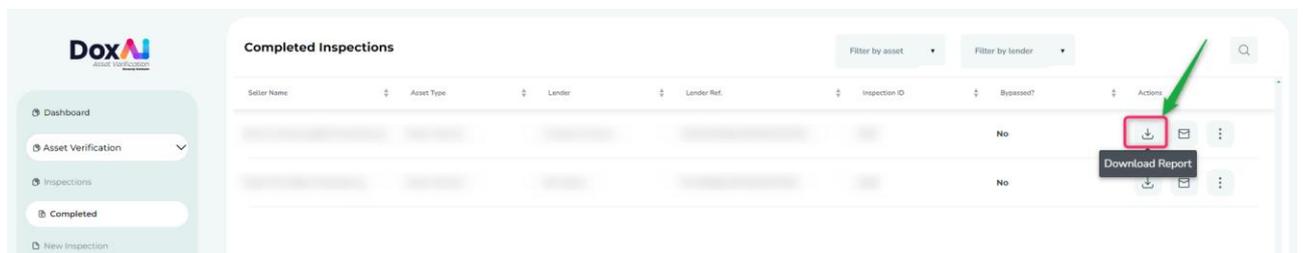

Keep in mind that the bypass reason will also be included in the final report for lenders or your reference.
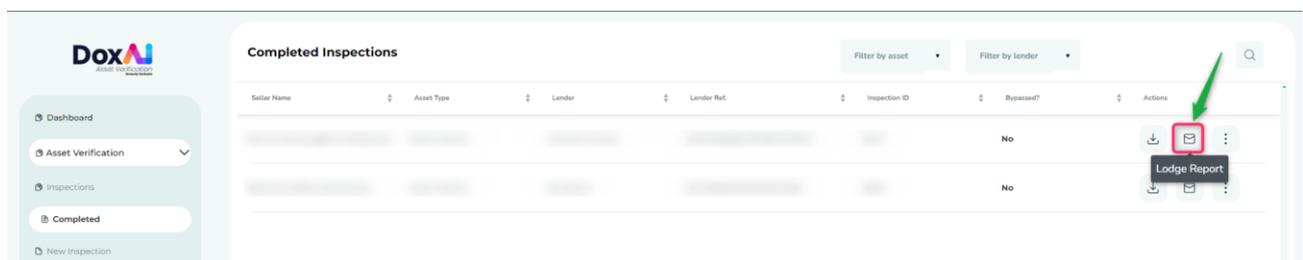
If it's a **no lender inspection**, you can **upload** the document (excluding ID and vehicle photos) on behalf of the seller.
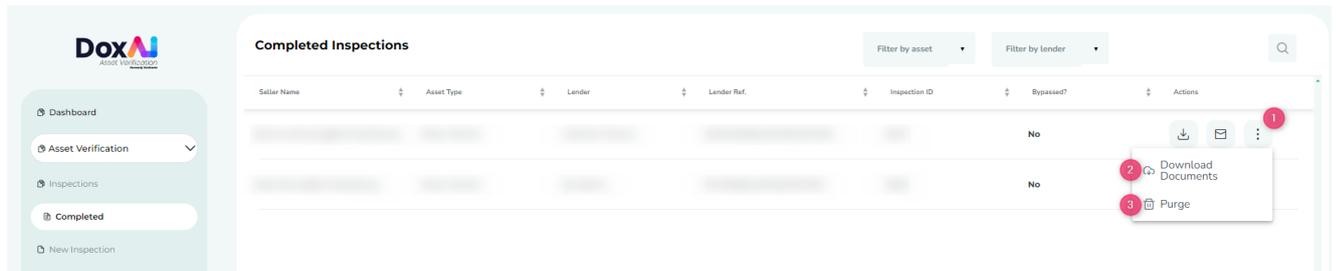
Download and send report to lender

- Go to "Completed" tab from left menu.
- Click on "Download Report" icon to download the report.

- Click on "Lodge Report" icon to send the report to the lender.

- Click on the three dots to download individual documents. You can also select purge to delete all the documents and report.
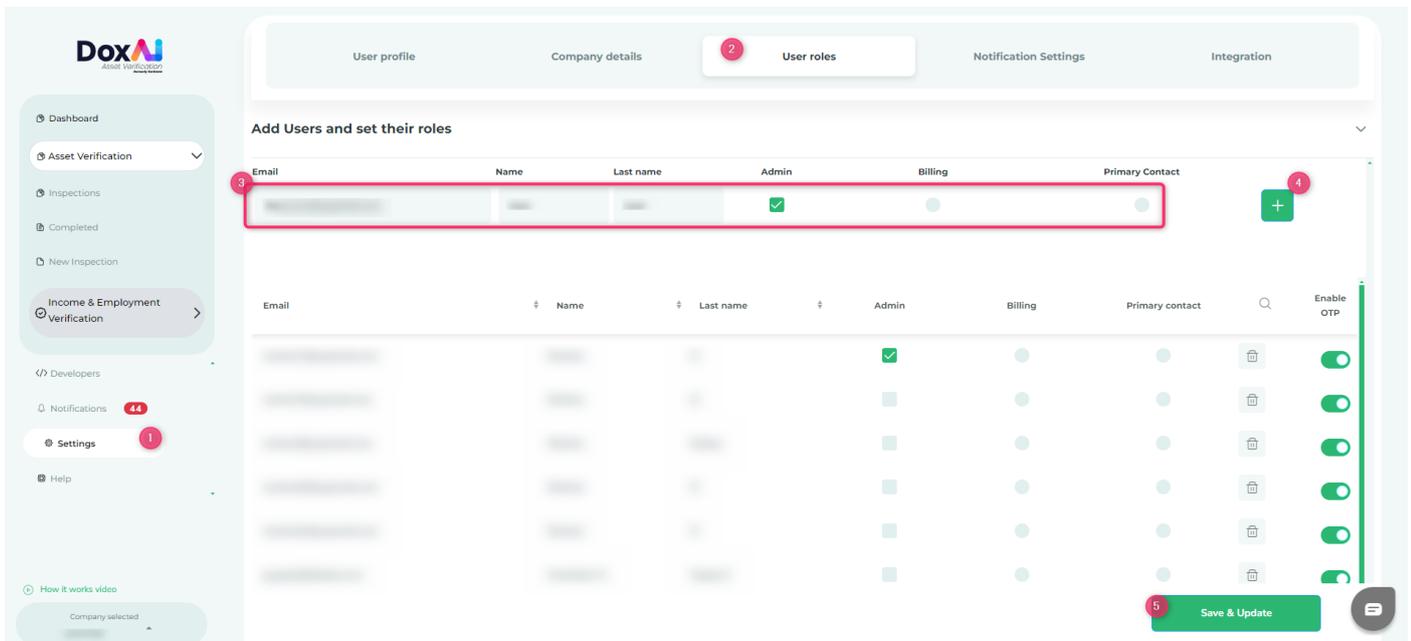

Invite new users (brokers) to join your company

- Go to Settings.
- Click on "User roles".
- Provide the user details, Email, First name, and Last name. Also assign the roles to the user (Admin, Billing, Primary Contact).

Admin: This role will have access to all the features available on the portal.

Billing: This role will have access to setting up the payment methods and invoicing options for the company.

Primary Contact: This role is the owner of the company account and will have access to all the features available on the portal. For any company level queries, our support team will contact this person.

Added user will receive an invitation email to join your company. Once the user completes the onboarding process using the invited link, they will get added as the broker of your company and can create new inspections.