



BROKER USER GUIDE

Version 1.4

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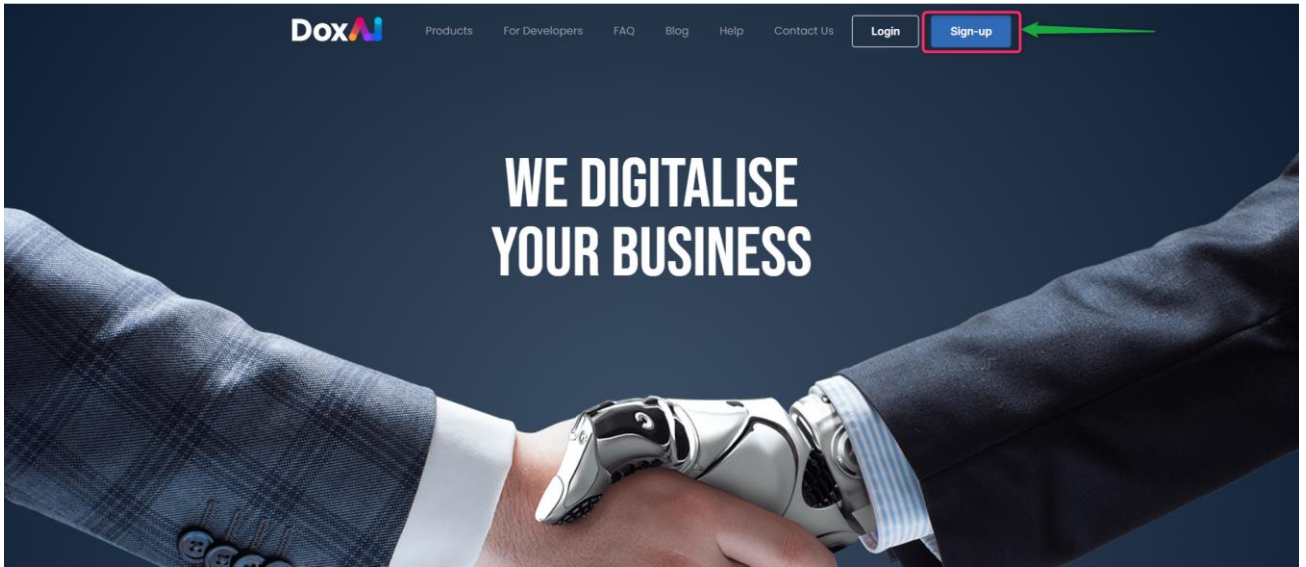
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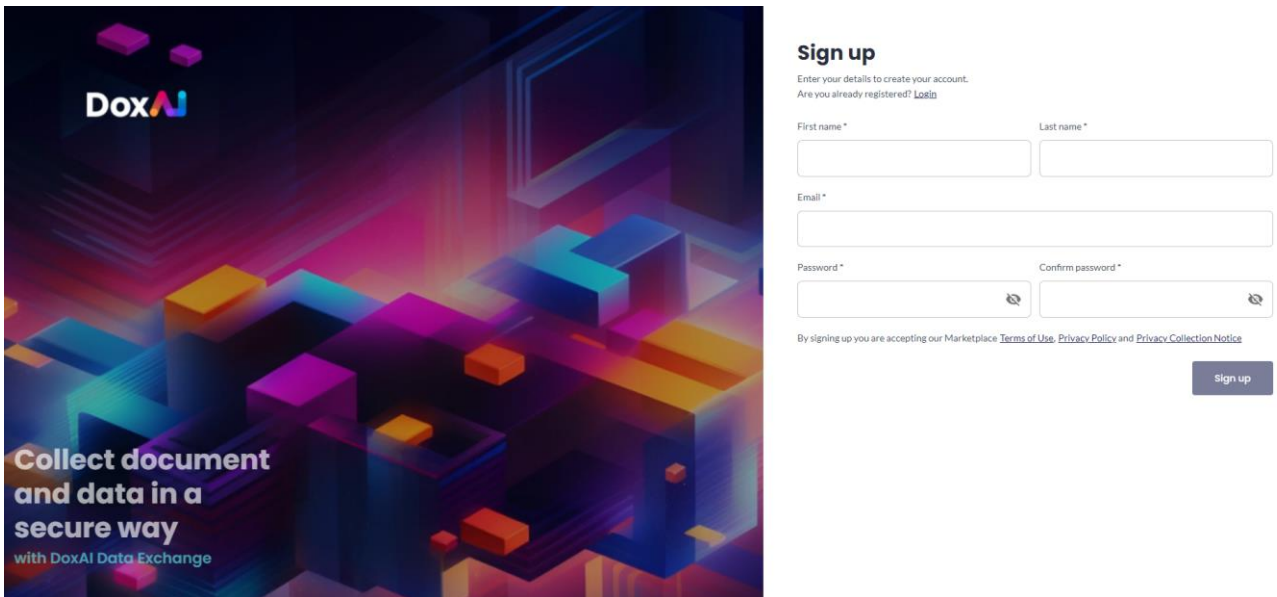
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Onboarding

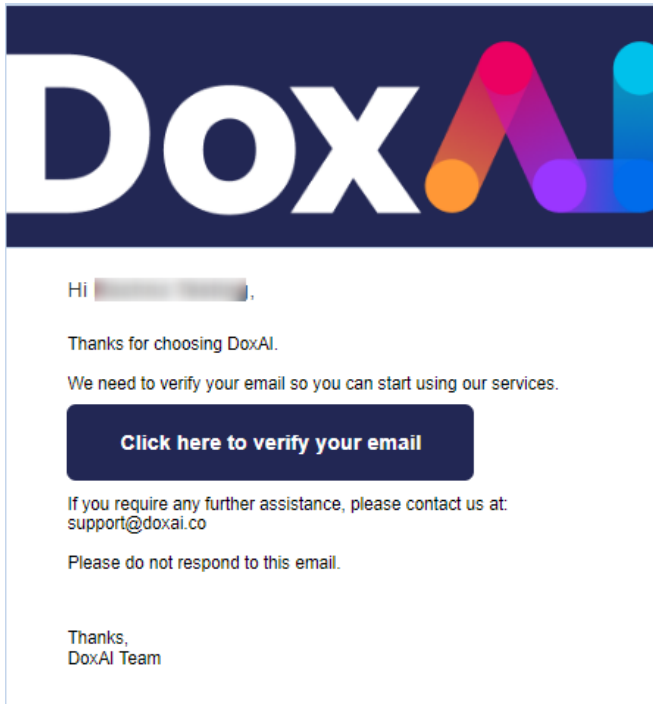
1. Visit [DoxAI](#) and click on “Sign-up”.



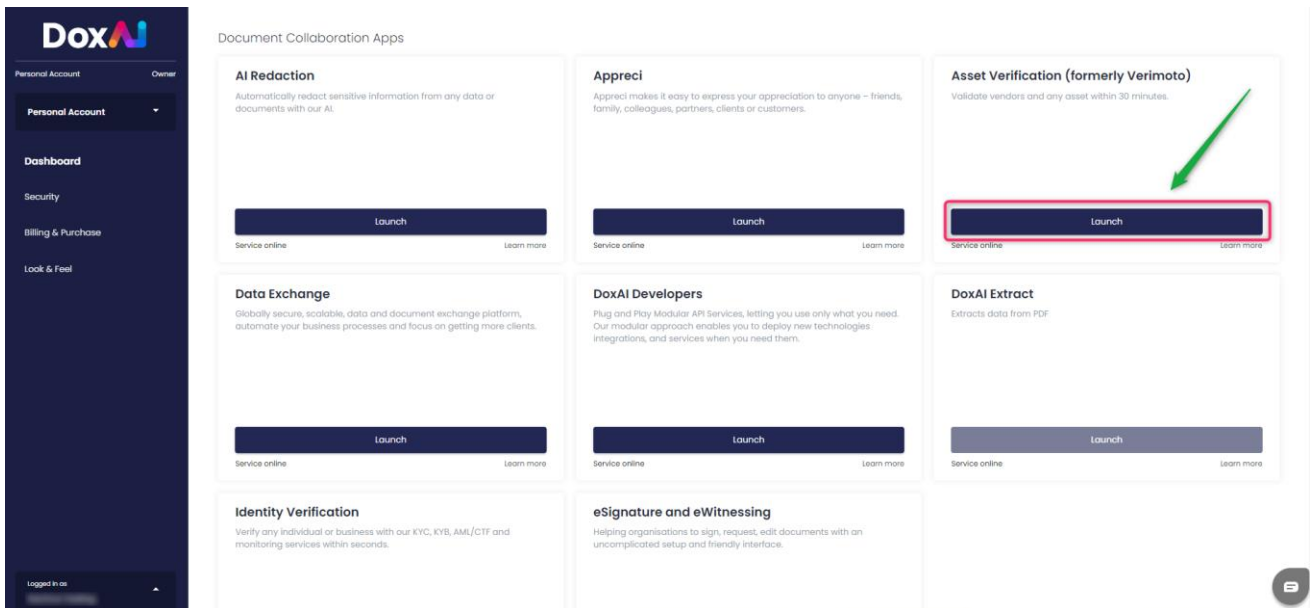
2. Provide your first name, last name, valid email and create a password to sign up.



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".

DoxAI
Asset Verification
formerly Verimote

Who are you?

- I'm a Broker
- I'm a Lender
- I'm a Business
- I'm a Consumer

DoxAI Asset Verification provides an asset verification service to brokers, lenders, businesses and vendors in just 30 minutes.

The fastest way to verify ownership for financial services in Australia.

[How it works video](#)

Before we start, we would like to know more about you...

I'm a broker (Document collector)

I would like to collect documents on behalf of lenders to facilitate an asset purchase transaction.

Select

I'm a Lender (Financial institution)

I would like to verify the authenticity of the assets and their sellers before lending money to the borrower.

Select

I'm a Business (Asset Buyer/Seller)

I would like to verify the authenticity of the assets and their sellers before proceeding with the transaction.

Select

I'm buying or selling a private asset

No lender or broker involved but I still want the ownership report to proceed with my deal.

Coming soon

[Go to next step](#)

6. Provide your details and go to next step.

DoxAI
Asset Verification
formerly Verimote

Who are you?

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- I'm a Lender
- I'm a Consumer

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The fastest way to verify ownership for financial services in Australia.

[How it works video](#)

Complete your broker profile

- 1** Personal information
- 2 Company information
- 3 User & Roles
- 4 Payment method
- 5 Lenders you work with

Personal information

Email

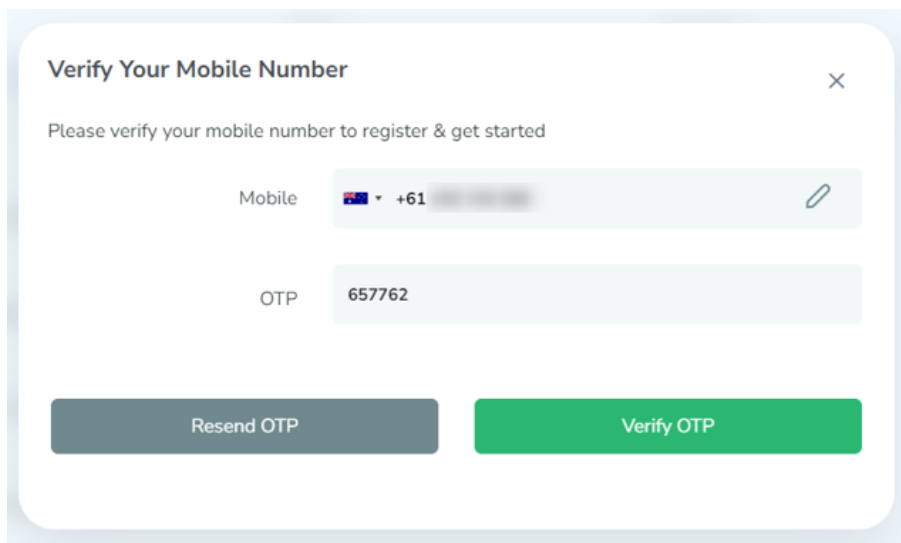
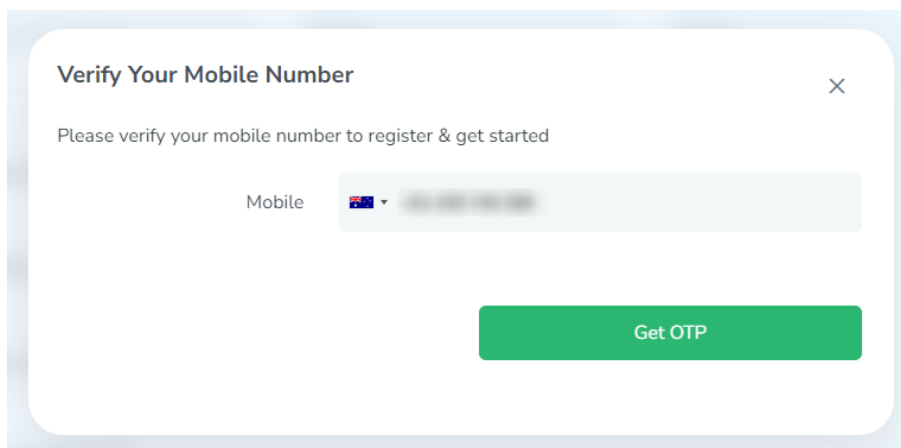
Name *

Last name *

Mobile *

[Go to next step](#)

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



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.

Complete your broker profile

Personal information

2 Company information

Joining into an existing company Set-up a new company

Look up the companies below ⓘ Can't find the company? [Click here to setup a new company](#)

Search by Company name or ABN / ACN

SUGGESTED BASED ON YOUR EMAIL SUGGESTED BASED ON YOUR EMAIL SUGGESTED BASED ON YOUR EMAIL SUGGESTED BASED ON YOUR EMAIL

Company name Company name Company name Company name

Go Back Register and Get Started

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

Complete your broker profile

Personal information

2 Company information

Joining into an existing company Set-up a new company

Look up the companies below ⓘ Can't find the company? [Click here to setup a new company](#)

Company name

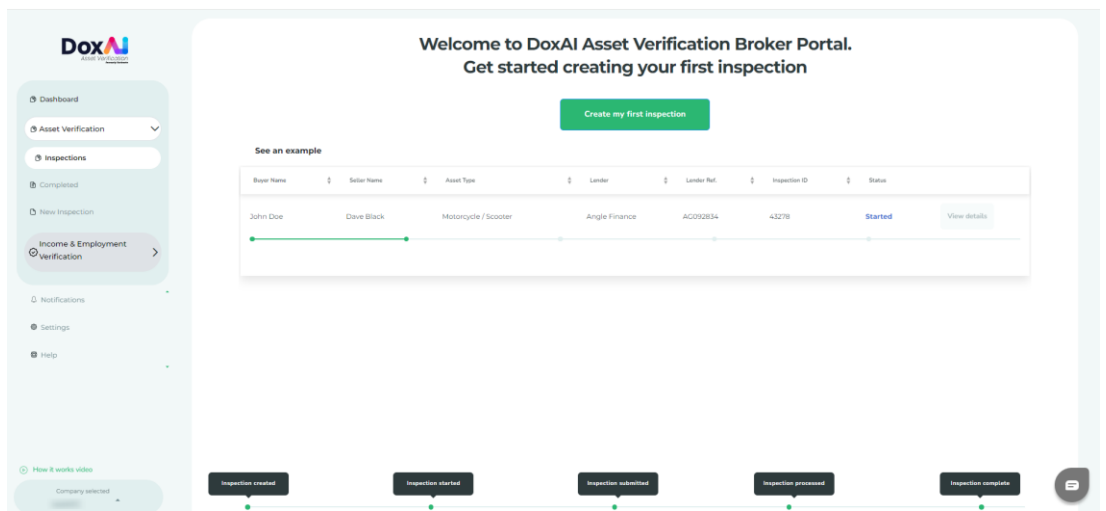
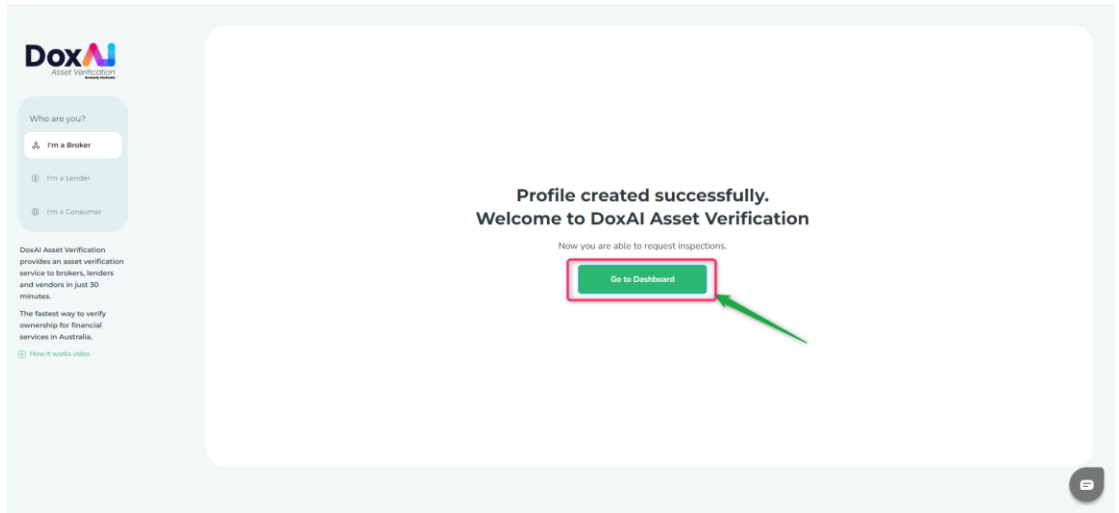
I WORK HERE

Company name

Couldn't find your company here?

Go Back 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”.

Complete your broker profile

2

Company information

Joining into an existing company | **1** Set-up a new company

2 Company name * | Registered company name * | ACN/ABN * | Verify

Company address * | Zip code * | State * | City *

Website | Email

Go Back | **3** 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).

Complete your broker profile

3

Company information

User & Roles

Email	Administrator	Billing Responsible	Primary Contact	
<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add user"/>
<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Delete user"/>

Payment method

Lenders you work with

- 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.

Complete your broker profile

4

Payment method

<input type="text" value="eg. XXXX XXXX XXXX XXXX"/>	<input type="text" value=""/>	<input type="text" value="mm/yy"/>	<input type="text" value="eg. XXXX"/>	<input type="button" value="+"/>
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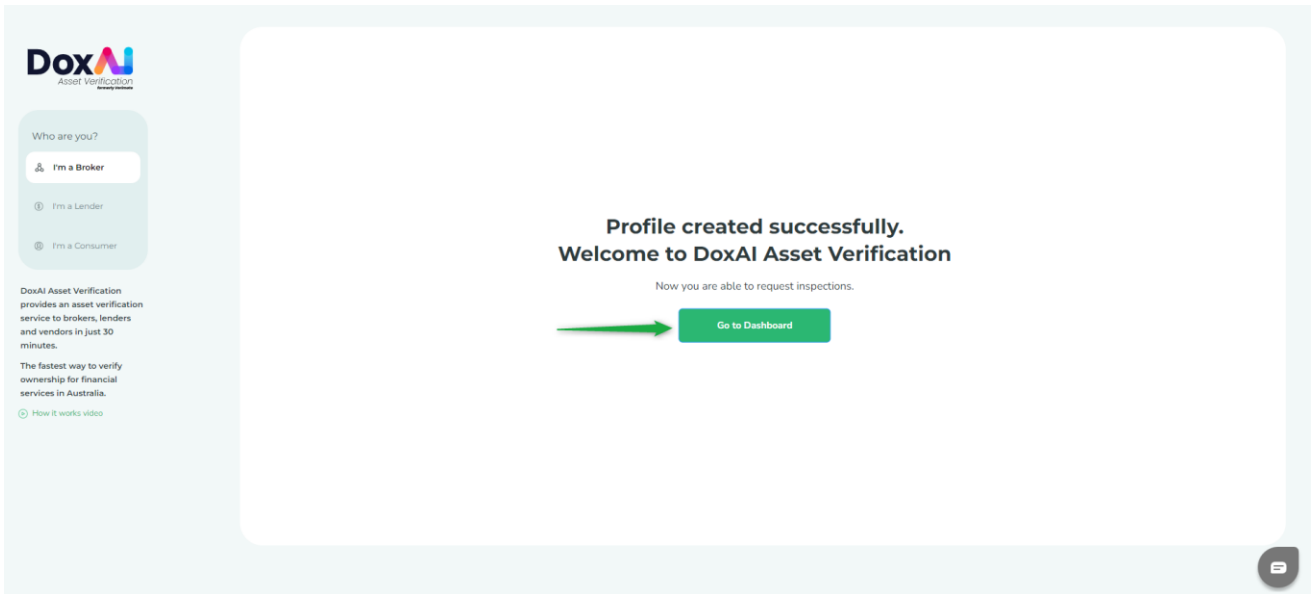
Select the primary below

PRIMARY PAYMENT METHOD

<input type="text" value="XXXX XXXX XXXX"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="..."/>	
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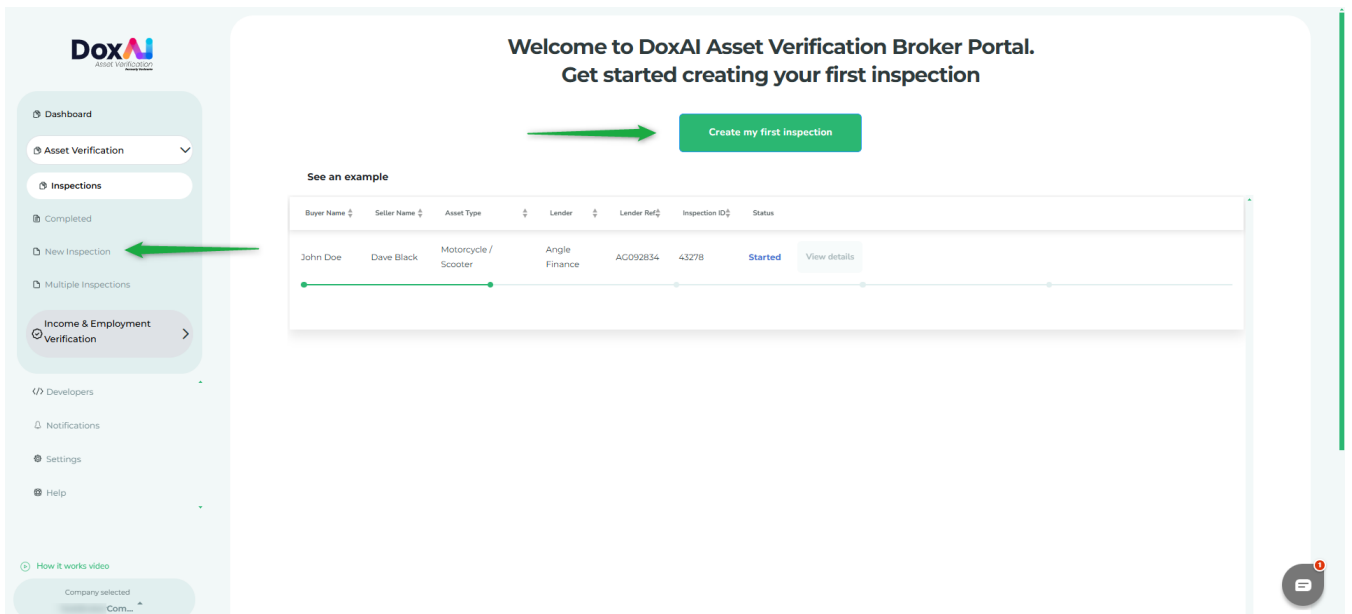
- vii. Select the lenders you work with.
- viii. Select the assets you work with.

ix. Register and get started.



Create an inspection

1. Click on “New inspection” in the left menu OR on “Create my first inspection”.



2. Provide Seller details, Buyer details (optional) and select the Lender, Asset, State, Inspection type and Ownership Type. Provide the **deal/loan/lender reference number**, **Asset description** and **Asset value**.

Create new inspection

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 * State * Inspection type *

Ownership Type * Lender reference * Asset description / Comment Asset value *

Private Sale Motor Vehicle NSW New Lending

Save & Update

- The provided value in “Asset value” will be reflected in final report.
- The Asset Description/Comment field allows you to provide asset descriptions or instructions for the seller.

verify3.verimoto.com

Dox AI
Asset Verification
formerly Verimoto

Inspection 79618

Created on
18 September 2024 - 09:43

Seller name

Requested by

Asset to be inspected
Motor Vehicle

Asset description/Comment
Seller will see this message

Start inspection

Powered by **Dox AI**
Asset Verification
formerly Verimoto

2. Include additional inspection details under "**More Information.**"

More Information ▼

Does this seller have ABN?	No <input checked="" type="radio"/> Yes	Seller's ABN	<input type="text" value=""/>
Is seller registered for GST?	No <input checked="" type="radio"/> Yes		
If seller uploads payout letter instead of bank statement, is it acceptable for Funds Destination?	No <input checked="" type="radio"/> Yes		
Is the Rego already transferred on Buyer's name? <small>Note: We will not match the name on rego with the name in Funds Destination.</small>	No <input checked="" type="radio"/> Yes		

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.

3. You can share the inspection with other users in your company by searching for their Name, Surname, or Email. When you share the inspection, those users will have the ability to edit or delete it.

Share this inspection with brokers from same company ▼

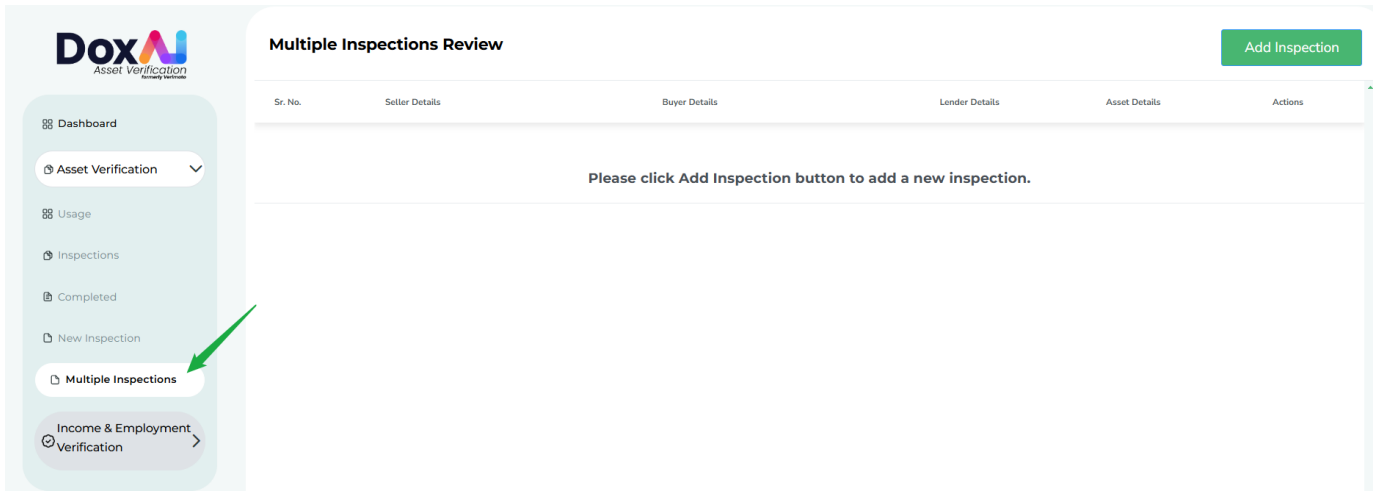
Search by Name, Surname, E-mail or Mobile number 🔍

[Save & Update](#)

Create bulk inspection

To create bulk inspections, follow these steps:

1. **Navigate to "Multiple Inspections"** from the left menu.



2. **Enter the required details** for the inspection and click **“Add”**. This will add the inspection to the multiple inspections queue and will navigate you to the multiple inspection draft screen.

3. Click **"Add Inspection"** from the top right corner to add another inspection to the list. The new inspection will be populated with the previous inspection's details. Review and edit as necessary, then click **"Add"**. On click **"Add"**, this inspection will get added to the multiple inspection queue and you will be navigated to the multiple inspection draft screen.

Multiple Inspections Review

Sr. No.	Seller Details	Buyer Details	Lender Details	Asset Details	Actions
1	Rafia Chowdhury	Rachina Rafia	LENDER DEMO ACCOUNT Ref: VM23456	Motor Vehicle NSW New Lending	

This Lender pays the inspection
Should Asset Verification not be approved to inspect this Lender.

Delete All **Submit**

4. **Repeat Step-3** to add more inspections to the queue.
5. Once all required inspections are added, click **"Submit"** from bottom right corner to finalise them.

After submission, sellers with the same email address will be able to complete all their inspections from a single web app link. If there are inspections for different sellers in the queue, those sellers will receive separate notifications to complete their inspections.

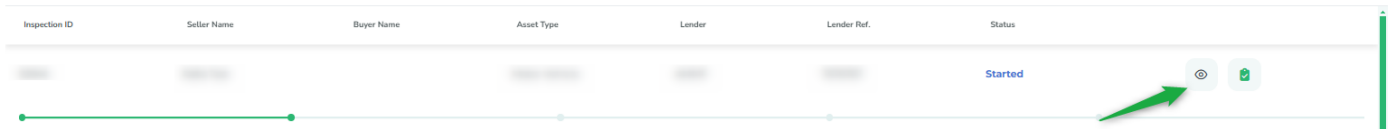
Sellers with multiple inspections created for same lender will complete the ID section once.

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”.

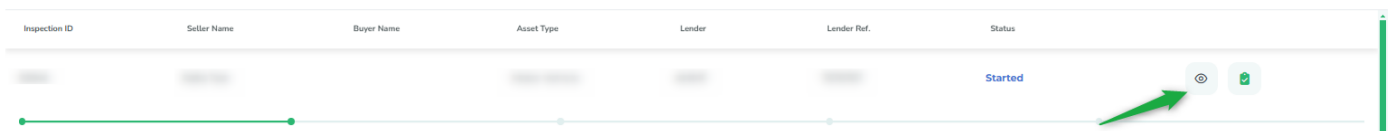


Inspection ID	Seller Name	Buyer Name	Asset Type	Lender	Lender Ref.	Status
						Started

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” icon.



Inspection ID	Seller Name	Buyer Name	Asset Type	Lender	Lender Ref.	Status
						Started

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.



Inspection ID	Buyer name	Seller Name	Asset Type	Lender
92657	---	Rafia Chowdhury	Motor Vehicle	No Lender
Created: 2023-08-15 10:30:00	Company: ABC COMPANY	Last activity: 2023-08-15 10:30:00	Created By: John Doe	Lender Reference: 123456
Asset Description / Comment:				
Inspection Progress	Activity Log	Edit Inspection	Send a Reminder	

Inspection Detail

Seller first name *	Seller last name *	Seller e-mail *	Seller mobile *
John	Doe	john.doe@example.com	+61 1234567890
Buyer first name (Optional)	Buyer last name (Optional)	Buyer e-mail (Optional)	Buyer mobile (Optional)
Lender *	Lender reference *	Asset *	Inspection Type *
No Lender	123456	Motor Vehicle	New Lending
Ownership Type	State *	Asset description / Comment	Asset value *
Company Owned Asset	NSW		100000

Cancel an inspection

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

Inspection ID	Buyer Name	Seller Name	Asset Type	Lender	Status	Actions
92657	Rafia Chowdhury		Motor Vehicle	No Lender	Created	 

In **“View Inspection”**, from Inspection Progress tab, you can cancel the inspection if the inspection is in **“Created”** status.

Inspection ID: [REDACTED] Buyer name: [REDACTED] Seller Name: [REDACTED] Asset Type: [REDACTED] Lender: [REDACTED]

Created: [REDACTED] Company: [REDACTED] Last activity: [REDACTED] Created By: [REDACTED] Lender Reference: [REDACTED]

Asset Description / Comment:

Inspection Progress | Activity Log | Edit Inspection | Send a Reminder

If this inspection is not correct - please cancel. [Cancel Inspection](#)

To upload documents, please Start Inspection [Start Inspection](#)

- ✓ Inspection Created 04/02/2025 - 09:45
- 2 Inspection Started
- 3 Inspection Submitted
- 4 Inspection Processed
- 5 Inspection Completed

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 cancelled outright. However, if you opt to **"Recreate"**, the previous inspection will be cancelled, and a new inspection form will open with the same details pre-filled for your convenience to edit.

Are you sure to cancel this Inspection?

Click Recreate button to cancel and recreate new inspection with same buyer and seller details. Click Confirm button to cancel this inspection.

This action cannot be reversed

[Recreate](#) [Confirm](#)

View rejected documents, notify seller, or request bypass

View Rejected Documents

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.

Inspection ID	Seller Name	Buyer Name	Asset Type	Lender	Lender Ref.	Status
						Rejected

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

Rego Papers (Rego Papers Front) ⓘ

Reject Reason:

- Details are not legible

Upload Bypass Notify Seller

Notify Seller

To send a customised message to the seller’s email, use the “**Notify Seller**” button.

Request for Bypass

- If you need to request a bypass for a rejected document, click “**Bypass**” and provide the reason for the request. Once the lender approves, 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, including the reasons.
- If the bypass option is not available for an inspection created for a specific lender, the broker must share the respective lender’s approving authority approval with us at support@doxai.co to request the support team to bypass a rejected document.

Rego Papers (Rego Papers Front) ⓘ

Reject Reason:

- Details are not legible

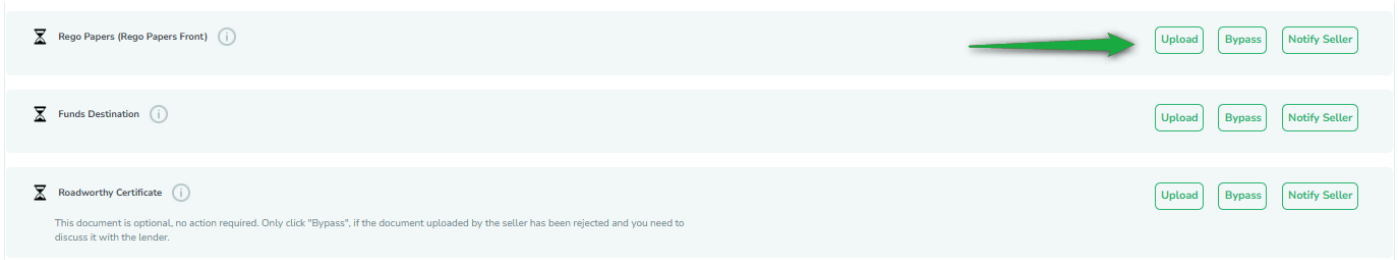
Write here the bypass reason

Cancel Send

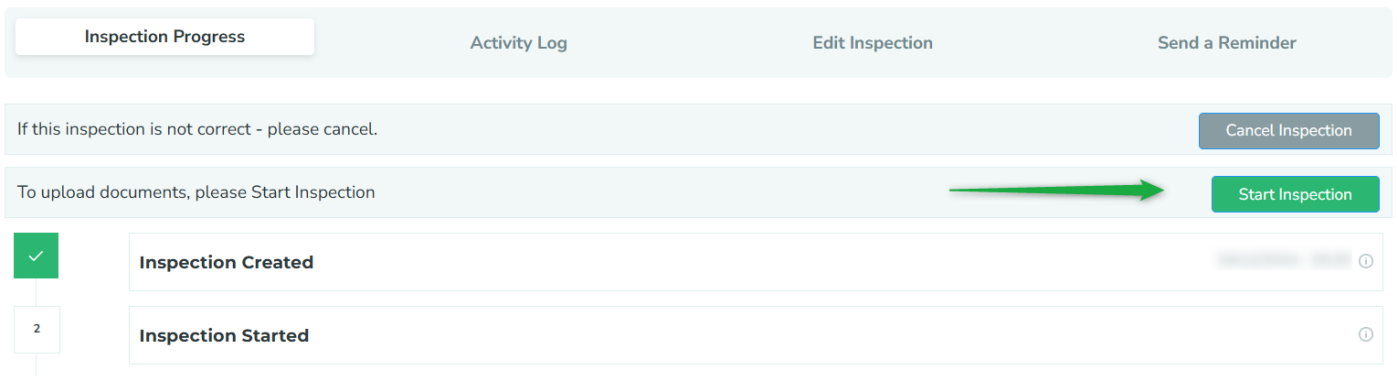
Keep in mind that the bypass reason will also be included in the final report for lenders or your reference.

Upload document on behalf of seller

If it's a **no lender inspection**, you can **upload** the document (excluding ID and vehicle photos) on behalf of the seller. You will see **upload button** against the **documents** for **started** inspection:



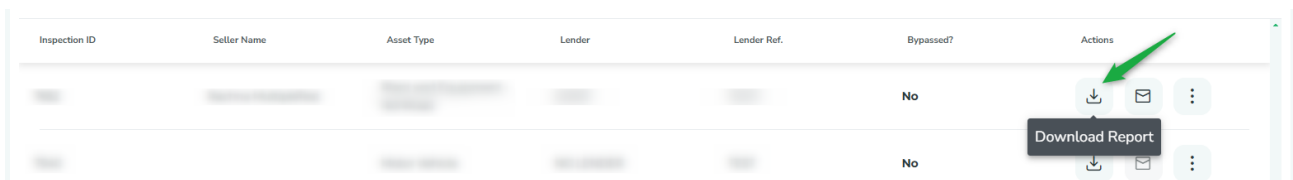
If the **inspection** is **not** yet **Started** by the **Seller**, you will need to first **Start** the **inspection** and then you will be able to **access** the **upload button** against the **documents**. Follow the instructions in **Inspection Progress** section to **Start** the **inspection**.



NOTE: For lender-based inspections, if lender has enabled upload option for brokers then you will have **ability** to **upload** the **selected documents** for the **inspections** 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 in PDF format.



- Click on “**Lodge Report**” icon to send the report directly to the lender.

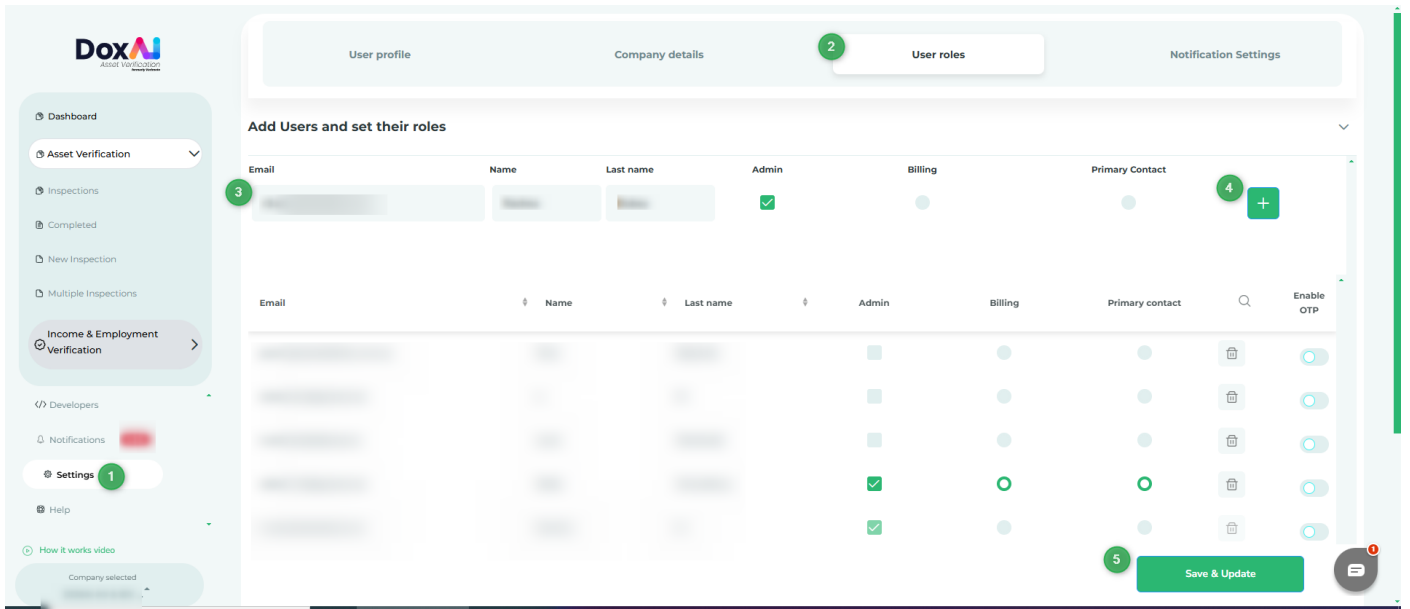
Inspection ID	Seller Name	Asset Type	Lender	Lender Ref.	Bypassed?	Actions
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	No	[Download] [Envelope] [Lodge Report] [More]
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	No	[Download] [Envelope] [More]

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

Completed Inspections						
Inspection ID	Seller Name	Asset Type	Lender	Lender Ref.	Bypassed?	Actions
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	No	[Download] [Envelope] [More] (1)
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	No	[Download] [Envelope] [More] (2)
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	No	[Download] [Envelope] [More] (3)

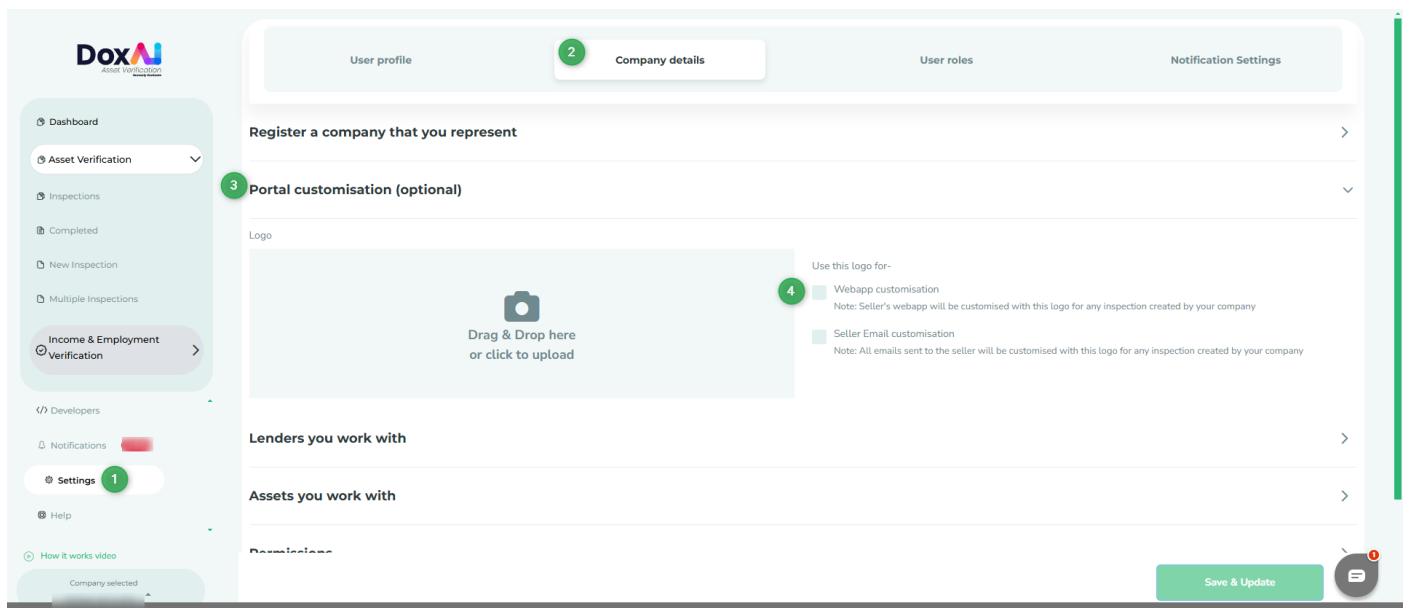
Invite new users (brokers) to join your company

- Go to “**Settings**” and click on “**User roles**”.
- Provide the user details, Email address, First name, and Last name. Also assign the roles to the user (Admin, Billing, Primary contact).
- Click “**+**” button to add this new user. You can add multiple users to the list using this button.
- Finally, click “**Save & Update**” button.
- Added user(s) will receive an invitation email to join your company. Once the user completes the onboarding process using that invited link, they will get added as the broker in your company and can create new inspections.
- **User Roles:**
 - **Admin:** The user with this role will have full portal access, can manage users, create inspections, and multiple admins can exist in one company.
 - **Billing:** Will have access to add/view/delete the payment methods and create inspections. Only one user can become billing responsible.
 - **Primary contact:** The primary contact is the main escalation point for support and queries, has access to all portal features except the payment section, and will be contacted by the support team for any issues; only one user can hold this role.



Customise the web app and seller emails with your company logo

To configure these, log in to your broker admin account, go to "Settings" from the left menu and click "Company details". Expand the "Portal customisation (optional)" section and select your preference.



Update the payment details for my Broker company

For non-payee lenders and no lender inspections you will need to add a payment method and Pay as you go via credit card. Only billing responsible person can update the payment method.

Pay as you go via Credit card- No Lender/Non-Payee lender inspections created from broker portal by you or any user within your broker company will be charged by credit card.

1. Go to "Settings".
2. Click on "Payment details".
3. Add a valid card detail and click "Save & Update".

Enable all broker users to use their own card for paid inspections

Admin users can allow the broker users to add or update payment methods for each paid inspection.

Follow below steps to enable this option:

1. Go to **Settings > Company Details**.
2. Expand the **Permissions** section.
3. Under **Permissions for Payments**, enable '**Allow users to add or update payment details for each inspection?**'

What this means for the brokers:

- Brokers can choose to **either** add a credit card and pay directly, **or** send a payment link to the Seller/Buyer via **both email and phone**.
- If the payment link is sent to the Seller/Buyer, the inspection will be created automatically once the payment is completed.
- If your company already has a credit card under "Payment Details", it will only be accessible to the **billing responsible person** of your company.