

Consultant Onboarding Guide

Welcome to PropReportHub. This guide explains how new Consultants can set up their account, create a professional profile, and start receiving invitations to quote on projects.

Step 1: Registration

- Visit the PropReportHub website and click on 'Join as a Consultant'.
- Enter your name, email, and create a secure password.
- Verify your email address through the confirmation link sent to your inbox.

Step 2: Profile Setup

- Complete your profile with accurate details about your business.
- Add your company name, professional accreditations, and relevant qualifications.
- Select your regions of operation and service categories (e.g. structural surveys, ecology reports).
- Upload a logo or profile image to make your profile stand out.

Step 3: Subscription & Payment

- Begin with a Free Trial (2 months) to test the platform.
- Choose a subscription plan (Standard, Premium, or Custom) once your trial ends.
- Pay securely via Stripe or another approved provider.
- Subscription fees are annual, and a 5% commission applies to all instructed projects.

Step 4: Verification

- Our compliance team will review your profile and may request evidence of qualifications, insurance, or professional memberships.
- Once verified, your profile will become visible to Clients in your selected regions.

Step 5: Receiving Invitations

- Clients browse and invite Consultants to quote on relevant projects.

- You will receive email notifications and dashboard alerts when invited.
- Review project details carefully before submitting a response.

Step 6: Submitting Quotes

- Prepare and submit your quotation directly through the platform.
- Include timescales, fees, and any conditions.
- Keep all communication in-platform to ensure an auditable trail.

Step 7: Appointment & Delivery

- If appointed, you'll receive confirmation in your dashboard.
- Upload all reports, drawings, and supporting documents securely.
- Maintain communication with the Client through the platform.

Step 8: Compliance & Best Practice

- Always comply with professional standards and UK regulations.
- Ensure all reports are accurate, complete, and delivered on time.
- Keep project records updated in your dashboard for transparency.

Step 9: Support & Help

- Access FAQs and guides via the Help Centre.
- Contact PropReportHub support at info@propreporthub.com for assistance.
- Feedback on your experience helps us improve the platform.

Closing Note

By completing these steps, Consultants can successfully onboard to PropReportHub, start receiving invitations to quote, and grow their business through our trusted platform.