



Consultant Onboarding Guide

A practical guide to joining and using PropReportHub | Free Launch Edition

Edition	Free Launch
Version	1.1
Last updated	31 August 2026

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Welcome to PropReportHub

PropReportHub helps property consultants present their services, receive relevant invitations to quote, communicate with clients and keep a clear project record. The Platform is free for consultants during the launch period.

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1. Free Launch at a glance

During the Free Launch:

- consultant membership is £0;
- listing fees are £0;
- PropReportHub commission is 0%;
- no payment card is required;
- no Stripe subscription, payment or automatic paid renewal is created; and
- you agree and collect your own professional fee directly from the Client.

PropReportHub may introduce optional paid membership arrangements in the future. Clear advance notice will be provided, and you will not be charged or moved to a paid arrangement unless you actively choose and agree to it.

2. Before you register

Have the following information ready:

- your legal and trading name;
- business address, telephone number, email and website;
- business type, such as limited company, LLP, partnership, sole practitioner or public body;
- professional services and geographical areas covered;
- short business description and areas of expertise;
- relevant qualifications, memberships and registrations;
- professional indemnity and other relevant insurance details;
- logo and suitable profile image where applicable; and
- name and authority of the person managing the account.

Only include information you can support and keep current. Do not overstate experience, qualifications, availability or geographical coverage.

3. Create your account

Go to report.propreporthub.com and select “Join as a Consultant”. Enter the requested contact information, create a strong password and review the Terms and Conditions and Consultant Agreement before accepting them.

Use a monitored business email address. This address may receive account, security, Project and support notifications.

Keep login details private. Where several people need access, use the account and user arrangements provided by the Platform rather than sharing one password unnecessarily.

4. Build a strong consultant profile

A clear, factual profile helps Clients decide whether to invite you to quote. Include:

- what your practice does;
- who you typically assist;
- key service areas and specialist experience;
- relevant qualifications and professional memberships;
- geographical coverage and travel limits;
- typical project types;
- a professional website and contact information; and
- any important limitations, such as services not offered.

Keep the wording professional and specific. Avoid unsupported claims such as “the best”, “guaranteed”, “fully approved” or “industry leading”.

5. Choose services and regions

During the Free Launch, select the services and regions that genuinely reflect the work you are competent and insured to provide and the areas you can realistically cover.

Broad coverage may generate more invitations, but inaccurate coverage can waste time and reduce trust. Update your selections when capacity or service capability changes.

For multidisciplinary practices, identify the main service and add other genuine disciplines rather than listing every possible category.

6. Complete checks and keep details current

PropReportHub may ask for evidence of identity, business status, insurance, qualifications, memberships or profile claims. Respond promptly and provide clear, current documents.

Update the Platform when:

- an insurance policy renews, lapses or changes materially;
- a professional membership or registration changes;
- contact details or key personnel change;
- you stop providing a listed service;
- your geographical coverage changes; or
- you are temporarily unable to accept work.

Platform checks do not replace your own professional responsibilities or a Client's appointment checks.

7. Receive and review project invitations

An invitation is an opportunity to consider a Project, not an instruction. Review the information before deciding whether to quote.

Check:

- location and travel requirements;
- property or Project type;
- required report, survey or advice;
- purpose and intended reliance;
- deadline and likely access arrangements;
- available documents and known constraints;
- competence, capacity and insurance;
- conflicts of interest; and
- whether specialist input or additional investigation may be needed.

Decline promptly where the Project is unsuitable. This helps Clients move forward and keeps your pipeline accurate.

8. Prepare a clear quotation

Your quotation should make comparison easy while protecting both parties. State:

- your proposed scope and deliverables;
- important assumptions, exclusions and limitations;
- fee, VAT and expenses;

- payment and cancellation terms;
- anticipated inspection and delivery dates;
- information and access required;
- any specialist tests, third-party appointments or statutory permissions that are excluded or additional; and
- how long the quotation remains valid.

Do not leave foreseeable charges unexplained. Where the available information is insufficient, state that the quotation is provisional and identify what must be confirmed.

9. Appointment and your terms of engagement

When a Client decides to proceed, the professional appointment is between the Client and your practice. PropReportHub is not a party to that contract.

Before starting work, issue suitable terms of engagement covering the Client, property or Project, scope, deliverables, fee, VAT, expenses, payment terms, timescale, limitations, reliance, intellectual property, complaints, cancellation and liability.

Where a Client may be acting as a consumer, make sure your onboarding and cancellation arrangements comply with applicable consumer law.

Use the Platform appointment status as an administrative record, not as a substitute for signed or accepted terms.

10. Deliver the work and use the dashboard

Use the dashboard to keep the Project record clear. Update progress and communicate promptly where there is a delay, access problem, change of scope, additional fee, safety issue or need for further information.

Confirm material instructions and changes in your own records and, where necessary, issue revised terms or written approval.

Upload only the documents intended for the relevant users. Check file names, version dates, recipients and confidentiality before uploading.

Continue to comply with your professional standards, appointment terms and insurance requirements throughout the instruction.

11. Fees and payment

You agree your professional fee directly with the Client. During the Free Launch, PropReportHub does not deduct commission or charge a consultant subscription or listing fee.

During the Free Launch, invoice the Client directly using your normal business process. PropReportHub does not process your professional fee.

Make clear who is responsible for payment, when payment is due, whether VAT and expenses apply, and what happens if the scope changes or the Project is cancelled.

12. Documents, records and data security

Keep your own secure copies of quotations, terms, instructions, inspection notes, communications, reports, invoices and important uploaded files. Do not rely on the Platform as your only archive.

Use only the personal information reasonably required for the Project. Take care with identification documents, financial information, health information, occupier details and third-party data.

Before uploading a report or drawing, check that it is the correct version and does not contain unrelated Client information.

Report suspected unauthorised access or disclosure promptly to admin@propreporthub.com and follow your own breach-response process.

13. Professional standards and complaints

Only accept work that you can deliver competently, independently and within the agreed scope and timescale.

Maintain the insurance, registrations, licences and complaints procedures required for your services. Tell Clients how to raise a complaint and cooperate with any relevant professional body, regulator, insurer or redress process.

PropReportHub may assist with Platform records or communication but does not determine professional negligence, report quality, fee entitlement or contractual liability.

14. Account security and acceptable use

Use a strong unique password and protect access to the registered email account. Notify PropReportHub promptly if you suspect account compromise.

Do not:

- misrepresent qualifications, experience, insurance or availability;
- upload malware or unlawful material;
- scrape or sell Platform data;
- use Client contact information for unrelated bulk marketing;
- send abusive, discriminatory, threatening or deceptive messages;
- create fake reviews; or
- interfere with Platform security or operation.

15. Closing or pausing your account

Update or pause your profile when you cannot accept work. To request account closure, contact admin@propreporthub.com.

Closing your Platform account does not cancel existing Client appointments. You remain responsible for completing, transferring or ending those appointments properly and retaining required records.

PropReportHub may retain limited information where reasonably required for security, legal, dispute or regulatory purposes.

16. Help and support

For account, access or Platform questions, email admin@propreporthub.com. Include your name, business, registered email address and a clear description of the issue.

For urgent professional or Project issues, contact the Client directly as required by your appointment. Do not rely solely on Platform notifications for a critical deadline.

Quick launch checklist

Check before going live

- Account email monitored and password secure.
- Legal/trading name and contact details accurate.
- Profile wording factual and current.
- Services limited to competent and insured work.
- Regions reflect realistic coverage.
- Qualifications, memberships and insurance current.
- Terms of engagement and complaints procedure ready.

Quotation template covers scope, fee, VAT, expenses and timescale.

Own document backup and data-security process in place.

Capacity and availability kept current.

Frequently asked questions

Is it currently free?

Yes. During the Free Launch there is no consultant subscription fee, listing fee or PropReportHub commission.

Do I need to enter a payment card?

No. A payment card or Stripe checkout is not required for Free Launch membership.

Who pays my professional fee?

Your fee is agreed with and paid by the Client under your separate terms of engagement.

Does PropReportHub appoint me?

No. The Client decides whether to appoint you. Your professional contract is directly with the Client.

Does profile approval guarantee that I will receive work?

No. Invitations and appointments depend on Client requirements, location, competition, profile information and other factors.

Can I communicate directly with a Client?

Yes, where appropriate for the Project. Important instructions and changes should be recorded clearly and supported by your own professional records.

Where do I get help?

Email admin@propreporthub.com with your registered details and a clear description of the issue.

Important

This guide is practical guidance only. The current Terms and Conditions, Consultant Agreement, Privacy Policy and your separate Client appointment take priority if there is any inconsistency.