

# PURVIEW<sup>®</sup>

## FOR MORTGAGE BROKERS

### Getting Started Quick Reference Guide

#### **Step 1: Logging into Purview For Mortgage Brokers**

- To log into Purview for Mortgage Brokers, navigate to [www.purview.ca/brokers](http://www.purview.ca/brokers)
- In the top right hand corner, input your User ID and password provided to you in your account confirmation email
  - Passwords must be at least 6 characters and contain at least 1 numeric character, 1 lowercase and 1 uppercase character. If password does not meet requirements, you will be asked to change your password.
  - If you have forgotten your Login ID or password, please call our Customer Service Centre toll free at 1.855.787.8439
- Once your password has been accepted, you will be prompted to accept an End User License Agreement prior to proceeding to the home page
  - Click “I accept the terms of the License Agreement” then OK to access the Purview For Mortgage Brokers home page

#### **Step 2: View and change your personal preferences**

- To begin, click on the “+” symbol in the top right of your screen to expand the My Account section
- Here you can update the following:
  - Update your profile details including contact information
  - Set your Province & Land Registry Office (LRO) defaults
  - Customize your report views by changing the display order or whether you want show or hide a section

#### **Step 3: Perform a Property Search**

- Select your desired province from drop down menu
  - In the Province of Ontario, you must enter the municipality, town name, Land Registry Office (LRO) or postal code
- Search by entering the property address or owner name
  - In Ontario, you can also search by the Property Identification Number (PIN), instrument number or block number
- Select a choice from the drop down or click “Search” to initiate a search
- View potential matches from the search results table



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## **Step 4: Select the Broker Property Report**

- Click the Property Record that you would like to generate a Broker report on
- Confirm that you want to run the report
- Once you click “OK” and confirm you want to run the selected report, it will be instantly generated in the same browser window

## **Step 5: Review & Print the Property Report**

- Now that you have your property report, you can review the following:
  - Property Details
  - Ownership & Sales History
  - Estimated Property Value
  - Equity Estimate
  - Comparable Sales