

# APPLYPORT 2

## Using the “Create New Application Wizard”

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**Create a new Online application in 5 easy steps**

**Step 1 – Select the Application Type**

**Step 2 – Select you Building**

**Step 3 – Enter your unit or apartment number**

**Step 4 – Select your Role**

**Step 5 – Set up Parties to Your Application**

## Let's Get Started

# Welcome to ApplyPort

### Online Board Applications

Create a new application or choose a current one

Create a New Application

Get started by clicking "Create a New Application"



My Applications



Sample Packages



Update Profile



Help

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## Step 1 – Select the Application Type

### Create New Application

Select Application > Select Building > Unit # > Setup Parties > Pay Fees > Complete

#### Select an Application Type

What type of transaction is this application for?

- Lease
- Purchase
- Refinance
- Transfer

What type of application do you want to create? Select it here and click "Continue"

Continue >>

## Step 2 – Select a Building

### Create New Application

Select Application	Select Building	Unit #	Setup Parties	Pay Fees	Complete
Application Type	Purchase				 <a href="#">Edit</a>

#### Select a Building:

To find your building enter the BUILDING ADDRESS NUMBER ONLY. (Eg. Enter **123** for 123 Main Street).

Enter Building Address Number

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Enter the building address number here.  
For example - If the address is 310 East 49th Street,  
**ENTER 310.**

## Step 2 – Select a Building (continued)

### Create New Application

Select Application	<b>Select Building</b>	Unit #	Setup Parties	Pay Fees
Application Type	Purchase			

#### Select a Building:

To find your building enter the BUILDING ADDRESS NUMBER ONLY. (E.g. Enter 123)

Enter Building Address Number

Select your building

**15 Broad Street, New York**

**15 West Mill Drive, Great Neck**



When you click "Find Building" a list of addresses is returned that have the address number you entered. If your building is in the list click the green "Select" button next to it.

If your building does not appear in the list contact the property management company for assistance.

The buildings above match the building address number that you entered. If there is a 'Select' link to the right of your building, click it to continue. If it says not available it means there is no application for the application type you selected previously - please verify you chose the correct type. If you still cannot find the application you are looking for, [Contact Cooper Square](#).

## Step 3 – Enter Your Unit or Apartment Number

### Create New Application

Select Application	Select Building	Unit #	Setup Parties	Pay Fees	Complete
Application Type	Purchase				 <a href="#">Edit</a>
Building Selected	15 Broad Street				 <a href="#">Edit</a>
Completion Method	Online				 <a href="#">Edit</a>

**Enter Apartment or Unit Number:**

Enter your unit or apartment number

[Continue »](#)

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## Step 4 – Select a Role

### Create New Application

Select Application	Select Building	Unit #	Setup Parties	Pay Fees	Complete
Application Type	Purchase		 <a href="#">Edit</a>		
Building Selected	15 Broad Street		 <a href="#">Edit</a>		
Completion Method	Online		 <a href="#">Edit</a>		
Unit #	1410		 <a href="#">Edit</a>		

#### Select your Role:

In what capacity are you starting this application?

- Adult Occupant
- Applicant
- Applicants Attorney
- Applicants Broker
- CoApplicant
- Guarantor
- Owners Attorney
- Owners Broker
- Unit Owner

If you have made an incorrect choice in previous steps you can go back by clicking on the appropriate "Edit" button and modifying your selections.

What is your role in this application?

Please select it and click "Continue".

[Continue >>](#)

## Step 5 - Set-up the Required Parties

### Setup Required Parties

You must set up an Applicant, and at least 1 Unit Owner.

Applicant (1 party setup)

Open

Unit Owner (1 party setup)

Close

First Name:	<input type="text" value="John"/>	Last Name:	<input type="text"/>
Work Phone:	<input type="text" value="212-555-1212"/>	Cell Phone:	<input type="text"/>
Email:	<input type="text" value="john.mcmahon@f.onlinebuildings.com"/>		

If you want this party to help you complete or review this application, please enter an email address for this party.

Save Cancel

You must set up an applicant and at least one unit owner.

Since the applicant role was selected in the previous screen the logged in user was automatically set up as the applicant.

To set up the unit owner click "Add New" and enter the person's name and contact information. If you want ApplyPort to create a login account for the person you must enter an e-mail address

click "Save" to create the unit owner.

Continue »

## Step 5 - Set-up the Required Parties (continued)

### Setup Required Parties

You must set up an Applicant

When you click "Save" ApplyPort will show you a list of possible existing users that you can associate with the party you just set up. If one of the names in the list is a match click "Associate this login with this party". Otherwise click "Create New Login" to create a new user. In either case ApplyPort will send an e-mail to the party you set up with their user name, password and a link to the application.

**Applicant (1 party setup)** Open

**Unit Owner (1 party setup)** Close

John McMahon Edit

W: 212-555-1212 C: 917-555-1212 H: 212-555-1212  
email: john.mcmahon@f.onlinebuildings.com

**An existing user login has been found for this Last Name and Email.**

JMcMahon	John	McMahon	john.mcmahon@f.onlinebuildings.com	<a href="#">Associate this login with this party</a>
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If none of these logins match this user and you want to enable this party to view/update this application on ApplyPort,  
**Click the following link to create a log-in for this party : [Create New Login](#)**  
 An invitation will be sent to this party with their username and temporary password.

Close

## Step 5 – Set up Additional Parties (continued)

### Setup Additional Parties

In many applications there are additional parties involved in the transaction.

For example, if you are purchasing or leasing an apartment jointly with your spouse, the spouse would be a co-applicant. Maybe your parents are guaranteeing the mortgage and maintenance payments. They would be set up as a Guarantor.

Please check all of the party types that will be part of this application.

For each party type you check we will ask you to enter names and contact information in the next section.

- CoApplicant
- Adult Occupant
- Guarantor
- Applicants Broker
- Applicants Attorney
- Owners Broker
- Owners Attorney

**Each application may have one or more of these additional parties associated with the transaction. Please select the additional parties that will play a role in your application. We will ask you to enter their contact information and set up user accounts for them in the next screen.**

[Continue »](#)

## Step 5 – Set up Additional Parties (continued)

### Setup Additional Parties

In this screen you will set up each additional party to your transaction. Each party type may have one or more persons associated with it. Remember to include an e-mail address for each person and to create an user account for them so they can login and assist in the completion of the application.

**CoApplicant (1 party setup)** Close

First Name:	<input type="text" value="David"/>	Last Name:	<input type="text" value="Silverman"/>	Mobile Phone:	<input type="text"/>
Work Phone:	<input type="text" value="212-555-1212"/>	Cell Phone:	<input type="text" value="917-555-1212"/>	Home Phone:	<input type="text"/>
Email:	<input type="text" value="david.silverman@f.onlinebuildings.com"/>				

If you want this party to help you complete or review this application online via their own log-in, you will need to provide an email address for this party.

Click Save to set up the party
Save
Cancel


Adult Occupant

 Add New

Applicants Broker

 Add New

Owners Broker

 Add New

[Continue »](#)

## Step 5 – Set up Additional Parties (continued)

### Setup Additional Parties

When you clicked "Save" on the previous screen ApplyPort did a search for users in the system that potentially match the party you just set up. If an existing user matches your party click "Associate this login with this party". If no potential matches were found click "Create New Login".

In both cases a user account will be provided for the party and an e-mail will be sent with their username, temporary password and link to the application.

#### CoApplicant (1 party setup)

David Silverman  Edit  
 W: 212-555-1212 C: 917-555-1212 H:  
 email: david.silverman@f.onlinebuildings.com

**An existing user login has been found for this Last Name and Email.**

DSilverman David Silverman david.silverman@f.onlinebuildings.com [Associate this login with this party](#)

If none of these logins match this user and you want to enable this party to view/update this application on ApplyPort,

**Click the following link to create a log-in for this party : [Create New Login](#)**

An invitation will be sent to this party with their username and temporary password.

[Close](#)

## Step 5 – Set up Joint Parties (continued)

### Setup Joint Parties

If two or more parties hold assets in common or have a joint combination of joint ownership/income.

For eg, if John & Jane have a joint stock brokerage account please create a joint party for John and Jane, and another joint

If two or more persons own assets or liabilities jointly you will need to set a joint party here.


A joint financial statement will be provided in the online application where the joint assets and liabilities can be entered.

**Joint Parties** Close

The party name will be autogenerated

- Jessica Masters (Applicant)
- John McMahon (Unit\_Owner)
- David Silverman (CoApplicant)

**Save Cancel**

 **Add a new Joint Party**

After selecting the joint parties click "Save"

## Continue with Online Application

### Create New Application

Select Application	Select Building	Unit #	Setup Parties	Pay Fees	Complete (#10007)
Application Type	Purchase				
Building Selected	15 Broad Street				
Completion Method	Online				
Unit #	2510				
Your Role	Applicant				
Required Parties	Applicant: Jessica Masters Unit Owner: John McMahon				
Additional Parties	CoApplicant: David Silverman Adult Occupant: Allen Zielinski Applicants Broker: George Kiaff Owners Broker: Ted Kokkoris				
Joint Parties	J.M. & D.S. (David Silverman & Jessica Masters)				
Fees	Online Application Fee Paid				
Application ID	10007				

You have just created your online application.

Click "Continue Online Application" to get started.

Your application has been saved. You do not have to continue with the application at this time. You may log back in later to start the application.

 [Edit](#)

 [Edit](#)

 [Edit](#)

 [Edit](#)

**Congratulations!** You have successfully created Purchase application **10007**.

An email is being sent from you to each party you have set up with an ApplyPort account, displaying their username and password with a link to the online application.

Click Continue to start filling out your application online.

[Continue Online Application »](#)



# Help and Support

## Application Level Support

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Each application you create will be assigned to a specific Cooper Square processor. You will find your processor's name and contact information in the Welcome letter on the application.

## General Customer Support

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If you have general questions about using ApplyPort you may either contact your processor or call 212-634-5461 or e-mail [ap2support@coopersquare.com](mailto:ap2support@coopersquare.com)

## Join ApplyPort

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Property Management Companies are invited to join ApplyPort. For more information on becoming a member call 212-537-9331 or e-mail [support@applyport.com](mailto:support@applyport.com)