



THE MIRFIN DASHBOARD

A user's guide

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INTRODUCTION

Mirfin's online dashboard streamlines the more arduous processes associated with managing a community scheme. The dashboard offers property managers and insurance advisors the following features and benefits:

- manage your buildings' valuations, 10-year plans and admin fund budgets in one place.
- fast-track quotation requests 24/7.
- obtain real-time status updates.
- create a quick and easy roadmap to financial prosperity.
- no more broken spreadsheets.
- spin the **WHEEL OF FORTUNE** and win cash rewards.

This user manual will assist you in getting the most out of your Mirfin dashboard experience.

Should you require any assistance, please do not hesitate to contact us at 010 595 3883 or info@mirfin.co.za.

LOG IN

Go to www.mirfin.co.za and click the LOG IN button to enter your username and password.



If you or your team don't yet have a user profile, please contact us at info@mirfin.co.za to request one.

Simply state the name, email, phone no. and position of each person requiring a user profile and indicate the designated primary user (e.g. team leader).

The primary user has an "admin" function over his team and can –

- view/edit all properties of all users in the team
- view/edit the profiles of all users in the team
- add/delete users

NAVIGATING THE DASHBOARD

Go to www.mirfin.co.za and click the LOGIN button to enter your username and password.

The screenshot shows the Mirfin Dashboard interface. At the top, there is a navigation bar with the Mirfin logo and 'DASHBOARD' text. To the right of the logo are two main menu items: 'QUOTATIONS' (marked with a red circle 1) and 'ORDERS' (marked with a red circle 2). Further right is a 'GET A QUOTE' button (marked with a red circle 3) and a user profile icon (marked with a red circle 4). Below the navigation bar is a table of quotations. The table has columns for Quotation, Date, Status, Requestor, Job ID, and Total Fee. A search filter (marked with a red circle 5) is located above the table. The first row of the table has an 'Accept Quote' button (marked with a red circle 6). The table contains 10 rows of data with various quotation numbers, dates, statuses, requestor emails, job IDs, and total fees.

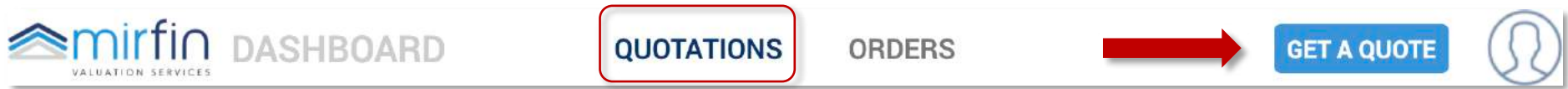
Quotation	Date	Status	Requestor	Job ID	Total Fee
927592	21.04.2020	pending	customer@mirfin.co.za	00 Test, Test City	R 3 726.00
927359	09.04.2020	accepted	customer@mirfin.co.za	00 Test Body Corporate, Test City	R 3 726.00
927277	07.04.2020	accepted	customer@mirfin.co.za	00 Test Complex, Johannesburg	R 3 622.50
927276	07.04.2020	accepted	customer@mirfin.co.za	00 Test House, Test, Pretoria	R 3 910.00
927275	07.04.2020	accepted	customer@mirfin.co.za	00 Test Body Corporate, Pretoria	R 3 680.00
925614	26.02.2020	accepted	customer@mirfin.co.za	00 Test Body Corporate, Pretoria	R 3 910.00
925542	20.02.2020	cancelled	customer@mirfin.co.za	00 Test Warehouse, Pretoria	R 3 657.00
926420	17.02.2020	accepted	customer@mirfin.co.za	00 Test Complex, Pretoria	R 3 634.00
926372	13.02.2020	accepted	customer@mirfin.co.za	00 Test House, Pretoria	R 4 094.00
926324	11.02.2020	accepted	customer@mirfin.co.za	00 Test Warehouse, Cape Town	R 3 381.00

- 1 - View list of quotations
- 2 - View list of orders
- 3 - Obtain an instant quotation
- 4 - Manage user profiles
- 5 - Search filter
- 6 - Instruct Mirfin to proceed with the quoted service

Try out each button or area to explore its function – no action on this page is final or irreversible.

GET A QUOTE

Request an instant quotation by clicking this button on the QUOTATIONS page and providing the required property details:



As a logged-in dashboard user, requesting a quote will take you less than 30 seconds on average, as all the pertinent details from your profile are already pre-filled in the on-screen prompts. It can't be any easier!

Is the expense already approved in the Admin Fund Budget? Then skip the quotation and go straight to ORDER NOW!

ORDER NOW

Skip the quotation process and place a direct order by clicking this button on the ORDERS page:



You only need to enter the subject property's details, as all other instructions will be auto filled from your user profile.

ACCEPT QUOTE

There are two ways to accept a quotation and instruct Mirfin to proceed with the required service:

1. Click the ACCEPT QUOTE button provided in the quotation e-mail, or
2. Click the Accept Quote button provided on the dashboard's QUOTATION view.



As a logged-in dashboard user, accepting a quote will take you less than 30 seconds on average as all the pertinent details from your profile are already pre-filled in the on-screen prompts. It can't be any easier!

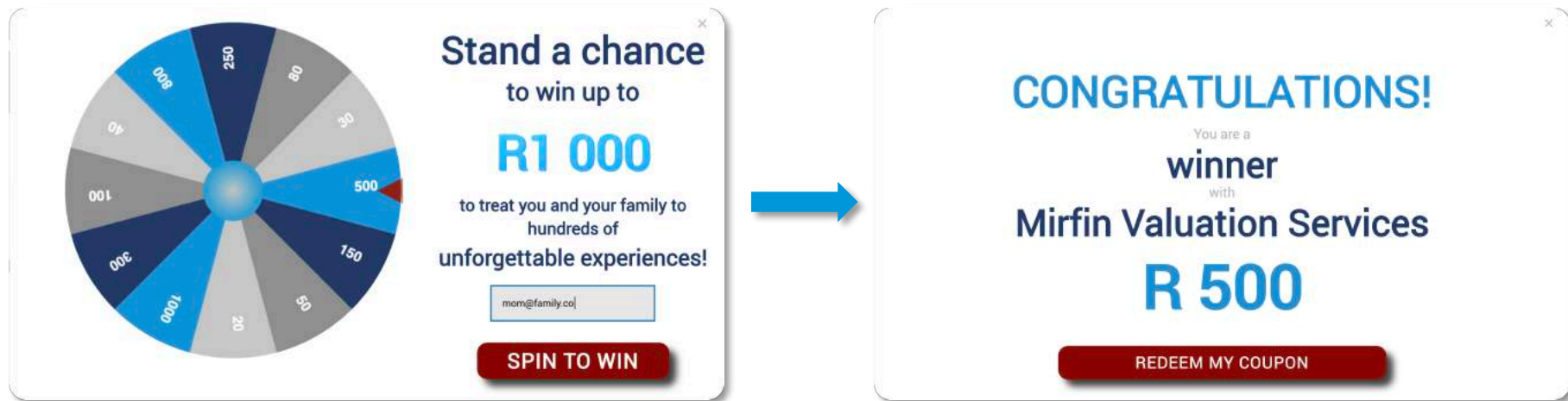
Don't forget to try your luck on the **WHEEL OF FORTUNE** after submitting your instructions!

Does your client need compelling reasons for appointing Mirfin?

- ★ *Mirfin will match or beat any competitor's quotation for the same service offering.*
- ★ *Mirfin holds unsurpassed professional indemnity insurance to the value of R45 million.*
- ★ *Why put yourself personally at risk for the sake of saving the body corporate a few hundred rand?*
- ★ *Mirfin offers a detailed breakdown of replacement costs as well as a detailed schedule per unit.*
- ★ *Mirfin provides you with a free annual valuation update!*

WHEEL OF FORTUNE

After having accepted a quote or placed a direct order, logged-in users will have the opportunity to spin the Wheel of Fortune and be rewarded for using the Mirfin Dashboard.

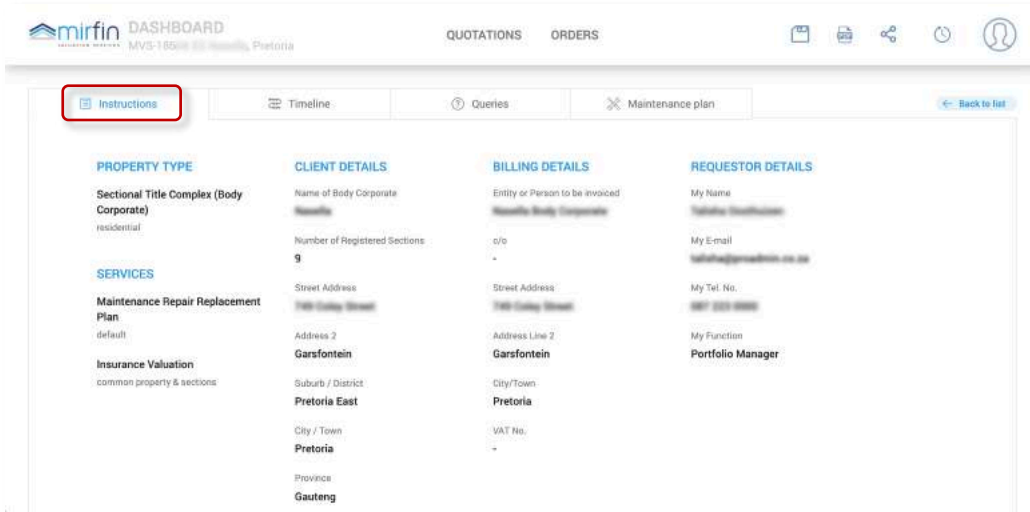


1. Enter an email address for the reward notification - you may even gift a friend or relative.
2. Click the red button to test your luck.
3. Redeem your coupon code immediately or collect your reward coupons for use at another time.

NOTE: The pop-up can be closed should you not wish to spin The Wheel of Fortune.

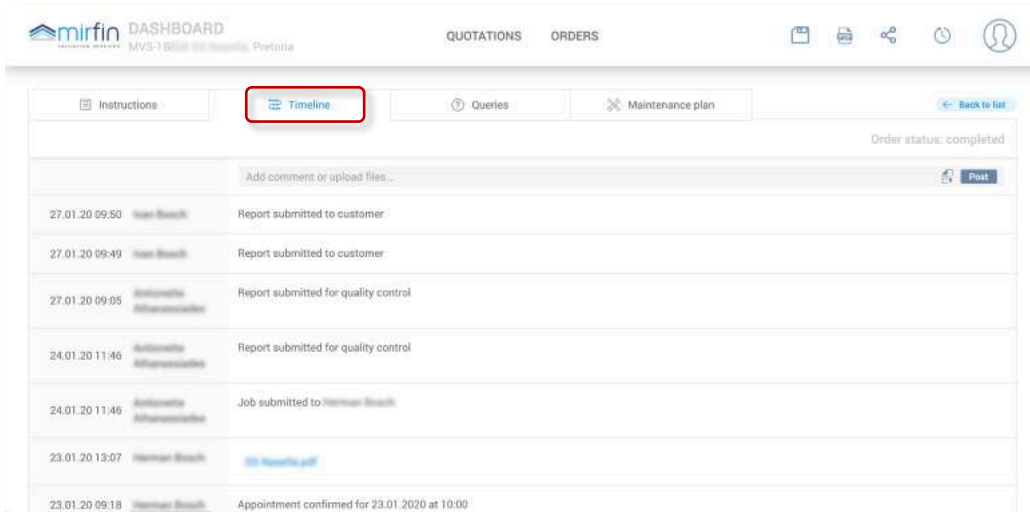
The Wheel of Fortune is NOT available to non-registered users.

VIEW / EDIT ORDER



Instructions

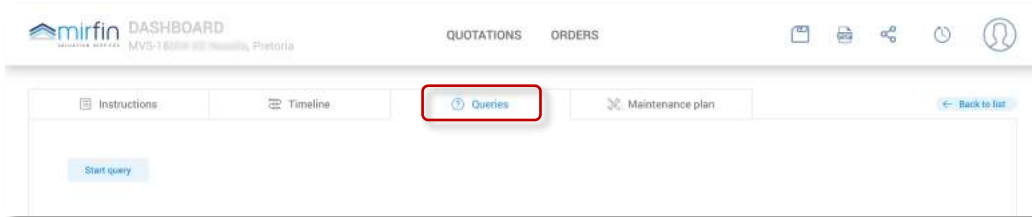
- View your instructions to Mirfin



Timeline

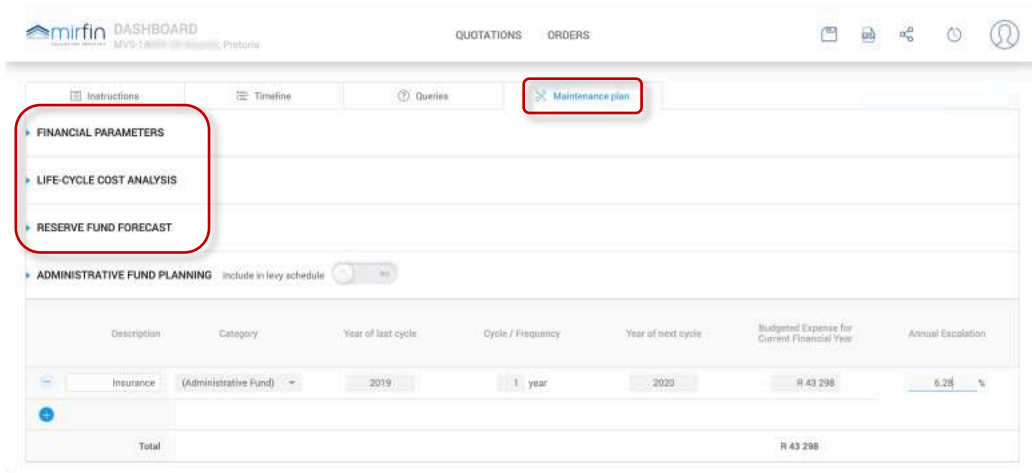
- Track the status of your order
- Review the chronology of your order
- Post a comment or question

VIEW / EDIT ORDER (continued)



Queries

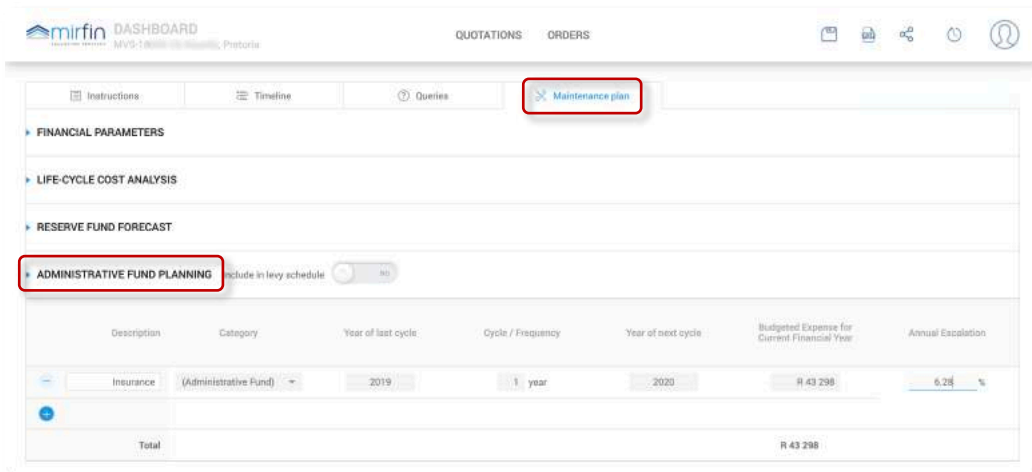
- This tab is enabled once the PDF report has been delivered to you.
- Click “Start query” to submit any questions or comments directly to the valuer.



10-Year Maintenance Plan

- Click the “share” icon to invite trustees to manage the 10-year plan themselves.
- Refer to the user manual titled “How to update the 10-year plan” for detailed instructions on creating and adjusting a 10-year plan.

OPEN 10-YEAR PLAN USER MANUAL



Admin Fund Budget

- Empower trustees to compile their own admin fund budget, thanks to the easy-to-use and self-calculating template.

ACTION BAR



Save your progress after editing fields and before generating a new PDF report.



View a PDF report or generate a new report after making adjustments.



Share the dashboard with someone – be mindful of who you allow to edit the MRRP.

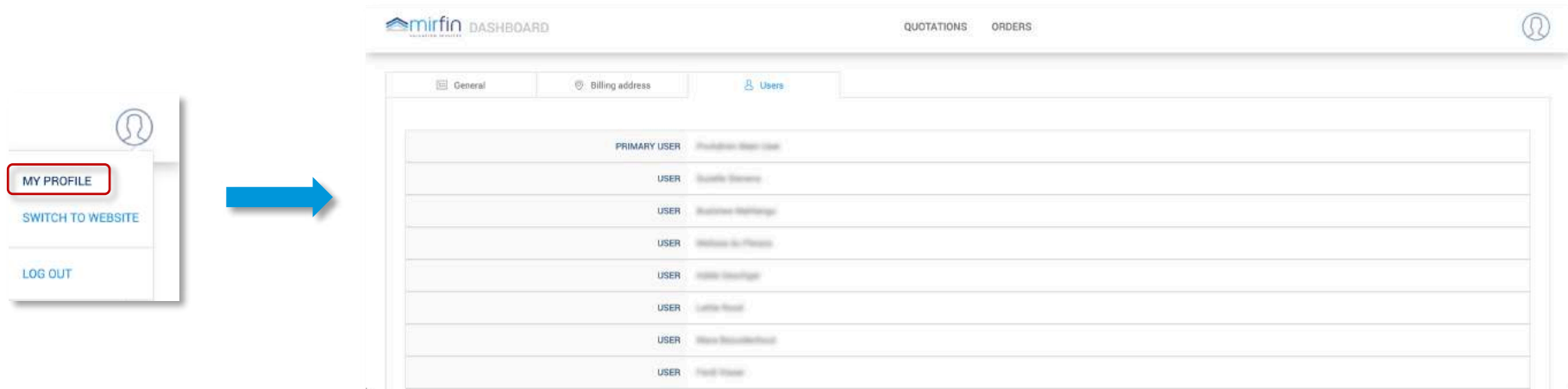


Request an updated report.



Manage user profiles or switch to the Mirfin website.

MANAGE USER PROFILES



1. Click the “User Profile” icon and select MY PROFILE.
2. View or edit your profile or a team member’s profile, only if you have admin permissions.
3. The following settings can be made here:
 - Company details
 - Billing details
 - User details
 - Password changes
 - User permission (view & edit)