



Introduction to the Real Estate Portal

# Real Estate Portal Training Video Index

Click [here](#) to view the training video

	Time Stamp
Introduction	0:00
Create an Account/Sign in	0:25
Dashboard: Update Account Information	2:10
Order a Plan and Add Plan to Cart	3:10
Proceed to Checkout and Complete Order Process	4:15
Order Confirmation Screen	7:00
Make a Payment Option	7:10
Dashboard: View Plan Order Status	7:25
Dashboard: Find Assigned Sales Manager	7:50
Customer Service Information	8:15

Start by going to:

[www.homeserve.com/realestate](http://www.homeserve.com/realestate)

# Creating an Account



[Sign In / Create Account](#)

[Order a Plan](#)

[Dashboard](#)

[Contact Us](#)

[About Us](#)

[FAQs](#)

## Real Estate Portal

We encourage professionals and agents to use the HomeServe Home Warranty Real Estate Portal to save time and easily access the following:

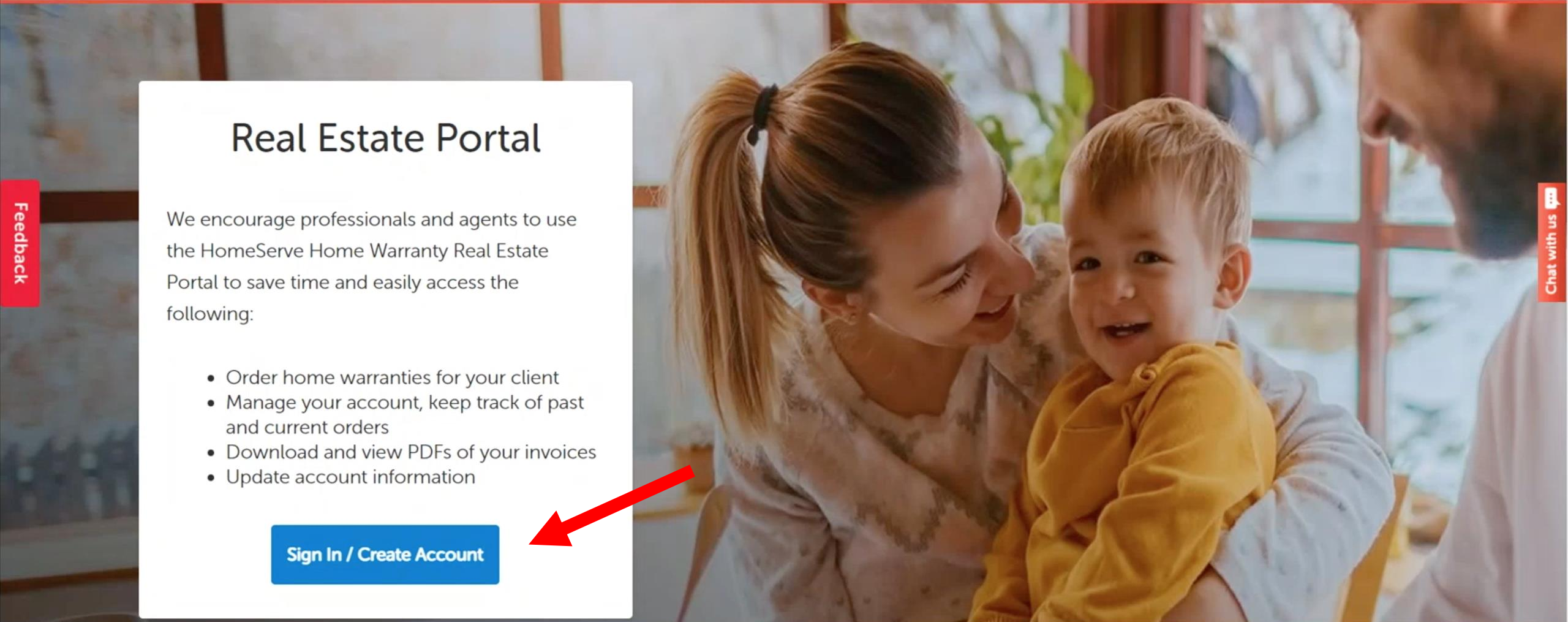
- Order home warranties for your client
- Manage your account, keep track of past and current orders
- Download and view PDFs of your invoices
- Update account information

[Sign In / Create Account](#)



[Feedback](#)

[Chat with us](#)



## Sign In

Already have a Homeserve.com web account? Simply enter that email and password below to sign in.

Email Address

Enter email address

Password

Enter password



[Forgot your password?](#)

Sign In

[Create your HomeServe account now](#)

## Create Account

Real estate professionals/agents are encouraged to use the Real Estate Portal to save time, to purchase client plans, and view invoices.

Email Address

Enter email address

First Name

Enter first name

Last Name

Enter last name

Retype the code from the picture

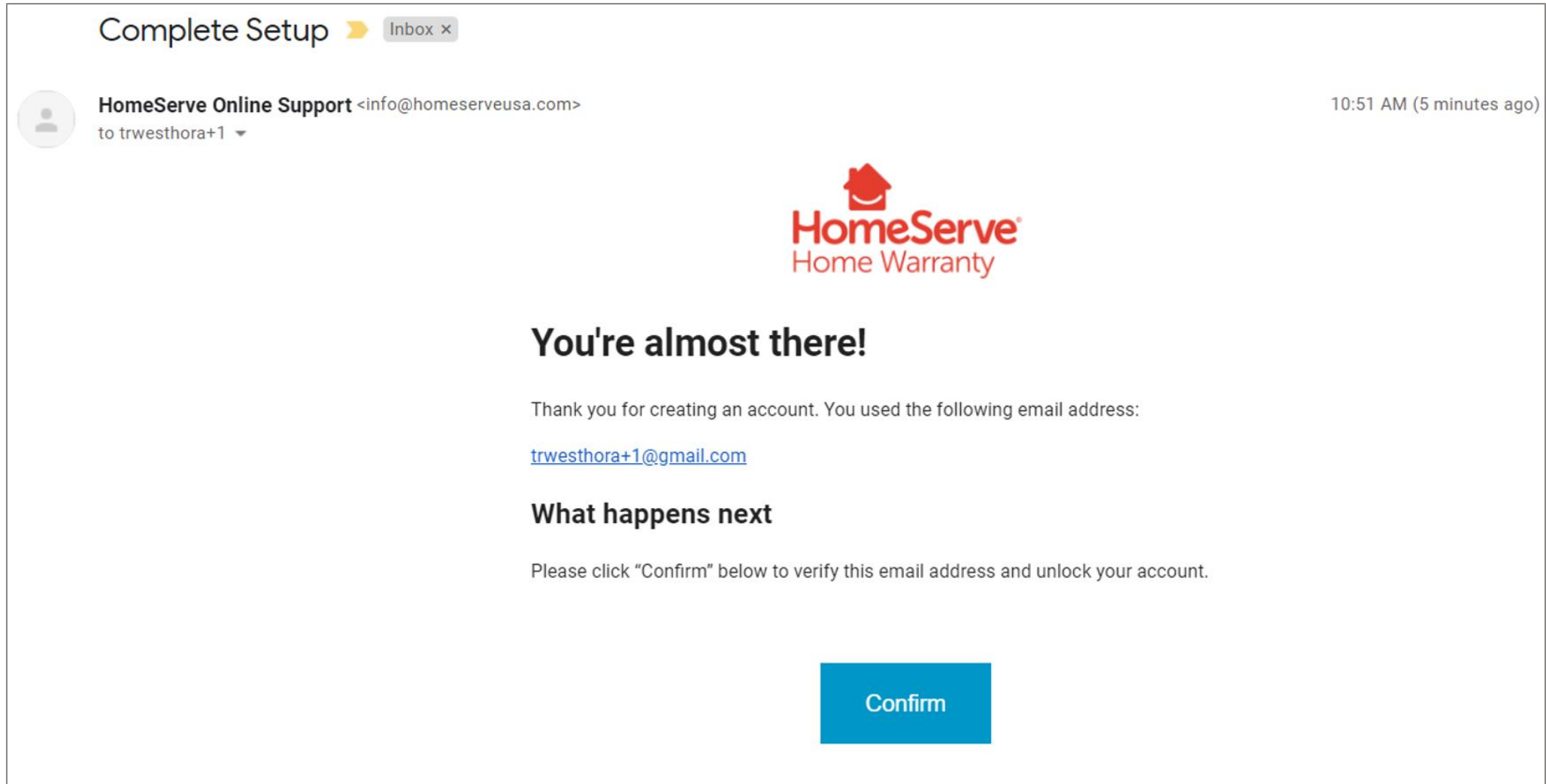


TYPE THE CODE ABOVE


Create Account

Oops! I already have an account. [Sign In](#)

# Confirmation Email



# Section One: Updating Contact Info



Welcome, Tom Westhora

Account Settings

Update Password

My Information

Sign Out

Order a Plan

Dashboard


Co

bout Us

FAQs


## Search Plans

Go Export Invoices (pdf)

<input type="checkbox"/>	# ▲	Covered Property Address	Home Buyer Name	Estimated Closing Date	Plan Order Date	Status	Plan Name(s)	
<input type="checkbox"/>	1	512 Gene Autry Middleton, ID 83644-5731	Westhora	08/31/21	08/25/21	Active	Premier Plan (1), Swimming Pool and/or Spa Systems (1), Exterior Water Service Line, Gas Line & Sewer Line (1)	166002491
<input type="checkbox"/>	2	123 Main St WYLIE, TX 75098	Westhora	08/31/21 	08/25/21	Presale	Essential Plan (1), Refrigeration/Freezer Unit (Additional) (1), Water Softener (1)	166002600
<input type="checkbox"/>	3	510 Gene Autry Ln Murphy, TX 75094-2623	Westhora	08/27/21	08/25/21	Active	Premier Plan (1), Swimming Pool And/Or Spa Systems (1)	166002431

com/realestate/contact-details

Show 10 < 1 >



Your Area Sales Manager:  
**Thomas Westhora**  
✉ thomas.westhora@homeserve.com  
☎ 888-888-8888

# My Account Information

First Name

Enter first name

Last Name

Enter last name

Email Address

Enter email address

Company Name

Enter company name

Home Phone

Enter phone number

Cell Phone (optional)

Enter phone number 2

Street Address

Suite or Apt. Number (optional)

Enter suite or apartment number

City

Enter city

State

Select a State



ZIP code


Enter ZIP Code

Save

Cancel

# With Your Zip Code, Your Area Sales Manager Appears

Street Address	Suite or Apt. Number (optional)
<input type="text"/>	<input type="text" value="Enter suite or apartment number"/>
City	State
<input type="text" value="Enter city"/>	<input type="text" value="Select a State"/>
ZIP code	
<input type="text" value="Enter ZIP Code"/>	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>




Your Area Sales Manager:

**Thomas Westhora**

✉ [thomas.westhora@homes.com](mailto:thomas.westhora@homes.com)

☎ 888-888-8888

# Ordering a Plan



Welcome, Tom WesthoraAccount Settings


Sign Out

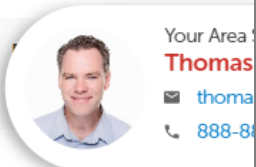
Order a Plan

DashboardContact UsAbout UsFAQs

## Search Plans

Go Export Invoices (pdf)

<input type="checkbox"/>	# ▲	Covered Property Address	Home Buyer Name	Estimated Closing Date	Plan Order Date	Status	Plan Name(s)	
<input type="checkbox"/>	1	512 Gene Autry Middleton, ID 83644-5731	Westhora	08/31/21	08/25/21	Active	Premier Plan (1), Swimming Pool and/or Spa Systems (1), Exterior Water Service Line, Gas Line & Sewer Line (1)	166002491
<input type="checkbox"/>	2	123 Main St WYLIE, TX 75098	Westhora	08/31/21 	08/25/21	Presale	Essential Plan (1), Refrigeration/Freezer Unit (Additional) (1), Water Softener (1)	166002600



Your Area 1  
**Thomas**  
thoma  
888-84

Available plans in:

83644 [Edit](#)

First, **choose** your main plan:

Not sure which is right for your client? [Compare Plans >](#)



### Essential Plan

This plan can help to prepare for the unexpected breakdown of essential appliances and systems in the home.

[Learn more](#)



This Plan Includes:

**\$475.00/yr.**

[Add To Cart](#)

[Terms & Conditions](#)



### Premier Plan

The Premier Plan gives the protection needed to deal with the costs of unexpected breakdowns of some of the most widely-used appliances and home systems.

[Learn more](#)



This Plan Includes:

**\$525.00/yr.**

[Add To Cart](#)

[Terms & Conditions](#)

## First, choose your main plan:

Not sure which is right for your client? [Compare Plans >](#)



### Essential Plan

This plan can help to prepare for the unexpected breakdown of essential appliances and systems in the home.

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**Add To Cart**

[Terms & Conditions](#)



### Premier Plan

The Premier Plan gives the protection needed to deal with the costs of unexpected breakdowns of some of the most widely-used appliances and home systems.

[Learn more](#)



This Plan Includes:

**\$525.00/yr.**

**Proceed To Checkout**

[Terms & Conditions](#)

If you don't require any add-ons, proceed to checkout.

Next, select your add-ons:

## Next, select your add-ons:

If you're done with your selection, you can skip the section below



### Refrigeration/Freezer Unit

This plan gives a feeling of peace of mind to know that the home's additional refrigeration/freezer unit is protected, which is any of the following: refrigerator in the kitchen (including an integral freezer or ice maker), wet bar refrigerator, wine refrigerator up to 20 bottles, and standalone freezer.

[Learn more](#)



This Plan Includes:

**\$50.00/yr.**

Add To Cart



### Swimming Pool and/or Spa Systems

This plan will help to prepare for the unexpected breakdown of heating, pumping and filtration systems of a swimming pool or spa.

[Learn more](#)



This Plan Includes:

**\$160.00/yr.**

Add To Cart



### Exterior Water Service Line, Gas Line and Sewer Line

The water, sewer and gas lines in a home can be affected by a clog or interruption. Help keep what's underground covered by being prepared with a home warranty for these service lines.

[Learn more](#)




This Plan Includes:

**\$80.00/yr.**

Add To Cart


## My Cart



Premier Plan 

\$525.00/yr



Swimming Pool and/or   
Spa Systems

\$160.00/yr

Total 2 Plans      **\$685.00/yr**

Applicable taxes will be applied.

**Proceed To Checkout**

Once you've  
selected add-ons,  
click proceed to  
check out and you  
will see everything  
added to your cart

# Enter All Information on the Order Screens

## Checkout

Thank you for choosing HomeServe Home Warranty. Please review your order, then enter the information requested below and submit your order.


Checkout

Progress 1 of 5

1 of 5

### Close of Escrow Date

Enter Date



### Who is enrolling this warranty?

I am a...

☐ Title Company / Transaction Manager

☐ Seller's agent

☐ Buyer's agent

## Checkout

Thank you for choosing HomeServe Home Warranty. Please review your order, then enter the information requested below and submit your order.

Checkout

Progress 2 of 5

2 of 5

### Home Buyer / Plan Holder's Information

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email Address	
<input type="text"/>	
Phone Number	Phone Number 2 (optional)
<input type="text"/>	<input type="text"/>
Address Covered by Plan	Address 2 (optional)
<input type="text"/>	<input type="text"/>
City	State
<input type="text"/>	<input type="text"/>

## Address not found!



Are you sure this is correct?

123 Main St

Delivery line 1

MIDDLETON

City

ID

State

83644

ZIP-code

-

+4 Code

[Yes, use this address](#)

or [enter a different address](#)

## Checkout

Thank you for choosing HomeServe Home Warranty. Please review your order, then enter the information requested below and submit your order.

Checkout Progress 3 of 5

3 of 5

### Buyer's Agent Information



First Name

Last Name

Company

Real Estate Team (optional)

Email Address

Phone Number

Address 1

Address 2 (optional)

# Search by Email Address

If you have entered an email previously it will autofill for future orders

Buyer's Agent Information

First Name

Last Name

# Checkout

Thank you for choosing HomeServe Home Warranty. Please review your order, then enter the information requested below and submit your order.

Checkout Progress 4 of 5



## Seller's Agent Information

First Name

Last Name

Company

Real Estate Team (optional)

Email Address

Phone Number

Address 1

Address 2 (optional)

# Checkout

Thank you for choosing HomeServe Home Warranty. Please review your order, then enter the information requested below and submit your order.

Checkout Progress 5 of 5



## Title/Closing Company

First Name

Last Name

Company

Real Estate Team (optional)

Email Address

Phone Number

Address 1

Address 2 (optional)

## Finalize Order

Please select the payer of the order:

- ☐ Buyer's agent
- ☐ Seller's agent
- ☐ Title Company / Transaction Manager
- ☐ Homeowner / Plan Holder

[Go Back](#)

**Place Order**

Total in cart due at closing.

# Congratulations!

## Order confirmation

Here's what you ordered

Order No. 166008193

Coverage	Quantity	Amount
Premier Plan Billing Frequency: Annually	1	\$525
Swimming Pool and/or Spa Systems Billing Frequency: Annually	1	\$160
Total amount		\$685


Please print this page for your records.

Be on the lookout!

You will be receiving a confirmation email from [info@homeserveusa.com](mailto:info@homeserveusa.com) If you do not receive this email, please check your spam/junk folder.

When we receive payment, we will send the buyer of the property a copy of the Service

# If Payment is not Via Title, You Can Pay Via Card!



## Make a Payment


Is you plan starting today? Make a payment.


## Due \$685

Applicable taxes will be applied

**Make Payment**

Close of escrow date

09/07/2021 

 Credit or Debit Card

Frequency: **One Time**

Payment Amount: **\$685.00**

Tax: **\$0.00**

Total: **\$685.00**


### This is a Secure Payment


By clicking the "Pay" button I authorize HomeServe USA to charge the amount(s) I have specified above to my credit/debit card provided. I authorize this as a one time payment only. I have the option to cancel this contract at any time without additional cost to me by calling [1-888-752-6740](tel:1-888-752-6740).


#### Payment Details


\* Required field

Card Type \*


☐  Visa


☐  Mastercard

☐  Amex

☐  Discover

Card Number \*

Expiration Month \*  

Expiration Year \*  

**Pay**

# Order Acknowledgement Email

Thank You! Here is your HomeServe Home Warranty Order Acknowledgement. 123 Main St

HomeServe Home Warranty

to trwesthoro+2, trwesthoro, me

12:28 PM (5 minutes ago)

Inbox

Put your home at your fingertips with the HomeServe App

Get The App

9:41

HomeServe Home Warranty

Welcome home

My Stuff

MyHome

Kitchen

Mechanical

Light

Appliance

Plumbing

Dear Tom Westhoro,

We would like to take this opportunity to express our sincere gratitude by saying "thank you" for selecting us to be the home warranty service provider for the property at the location in the Plan Holder details section below. We appreciate the business and look forward to assisting with home warranty repair needs for all plans listed below.

The closing date is 09/07/2021. Payment is due at the close of the sale. Please remit

When we receive payment, we will send the buyer of the property a copy of the Service Agreement. If you have any questions please do not hesitate to call our toll-free customer service number at 866-710-3700.

Sincerely,

Melanie McConnell  
Customer Service  
HomeServe

Your order is subject to any applicable taxes. For properties in Utah please call HomeServe Home Warranty at 866-710-3700 to confirm the price inclusive of Utah sales tax.

Here's what you ordered

Order number: 166008193

Plan Start Date: 09/07/2021

Premier Plan

Bill Frequency: Annually

Swimming Pool and/or Spa Systems

Bill Frequency: Annually

CoverageQuantityAmount

Total Amount\$685

1\$525

1\$160

HomeServe

Home Warranty

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# Dashboard Features

Search by  
any of the  
column  
data

Filter by  
column  
heading

Export  
invoices

Update/edit  
pending  
orders

The screenshot shows the HomeServe Home Warranty dashboard. At the top, there's a navigation bar with the HomeServe logo, a welcome message 'Welcome, Tom Westhora', and links for 'Account Settings', 'Sign Out', 'Order a Plan', 'Dashboard' (highlighted), 'Contact Us', 'About Us', and 'FAQs'. Below the navigation bar is a 'Search Plans' section with a search bar containing a magnifying glass icon, a red 'X' icon, and the text 'Search Plans'. To the right of the search bar is a red 'Go' button and a blue 'Export Invoices (pdf)' button. Below the search bar is a table with columns: '#', 'Covered Property Address', 'Home Buyer Name', 'Estimated Closing Date', 'Plan Order Date', 'Status', 'Plan Name(s)', and 'Plan Number'. The table contains four rows of data. The first row has a red circle around the '#' column header and a red circle around the 'Estimated Closing Date' cell for the first row, which contains a pencil icon. The second row has a red circle around the 'Status' cell, which contains the word 'Active'. The third row has a red circle around the 'Status' cell, which contains the word 'Presale'. The fourth row has a red circle around the 'Status' cell, which contains the word 'Active'. At the bottom of the table, there is a 'Show' button, a dropdown menu set to '10', and a pagination link '< 1 >'. Red arrows point from the text labels to the corresponding features: 'Search by any of the column data' points to the search bar, 'Filter by column heading' points to the '#' column header, 'Export invoices' points to the 'Export Invoices (pdf)' button, and 'Update/edit pending orders' points to the pencil icon in the 'Estimated Closing Date' cell.

HomeServe Home Warranty

Welcome, Tom Westhora Account Settings Sign Out

Order a Plan Dashboard Contact Us About Us FAQs

Search Plans

Search Plans Go Export Invoices (pdf)

#	Covered Property Address	Home Buyer Name	Estimated Closing Date	Plan Order Date	Status	Plan Name(s)	Plan Number
<input type="checkbox"/> 1	123 Main St MIDDLETON, ID 83644	Westhora	09/07/21	08/27/21	Presale	Premier Plan (1), Swimming Pool and/or Spa Systems (1)	166008193
<input type="checkbox"/> 2	512 Gene Autry Middleton, ID 83644-5731	Westhora	08/31/21	08/25/21	Active	Premier Plan (1), Swimming Pool and/or Spa Systems (1), Exterior Water Service Line, Gas Line & Sewer Line (1)	166002491
<input type="checkbox"/> 3	123 Main St WYLIE, TX 75098	Westhora	08/31/21	08/25/21	Presale	Essential Plan (1), Refrigeration/Freezer Unit (Additional) (1), Water Softener (1)	166002600
<input type="checkbox"/> 4	510 Gene Autry Ln Murphy, TX 75094-2623	Westhora	08/27/21	08/25/21	Active	Premier Plan (1), Swimming Pool And/Or Spa Systems (1)	166002431

Show 10 < 1 >