

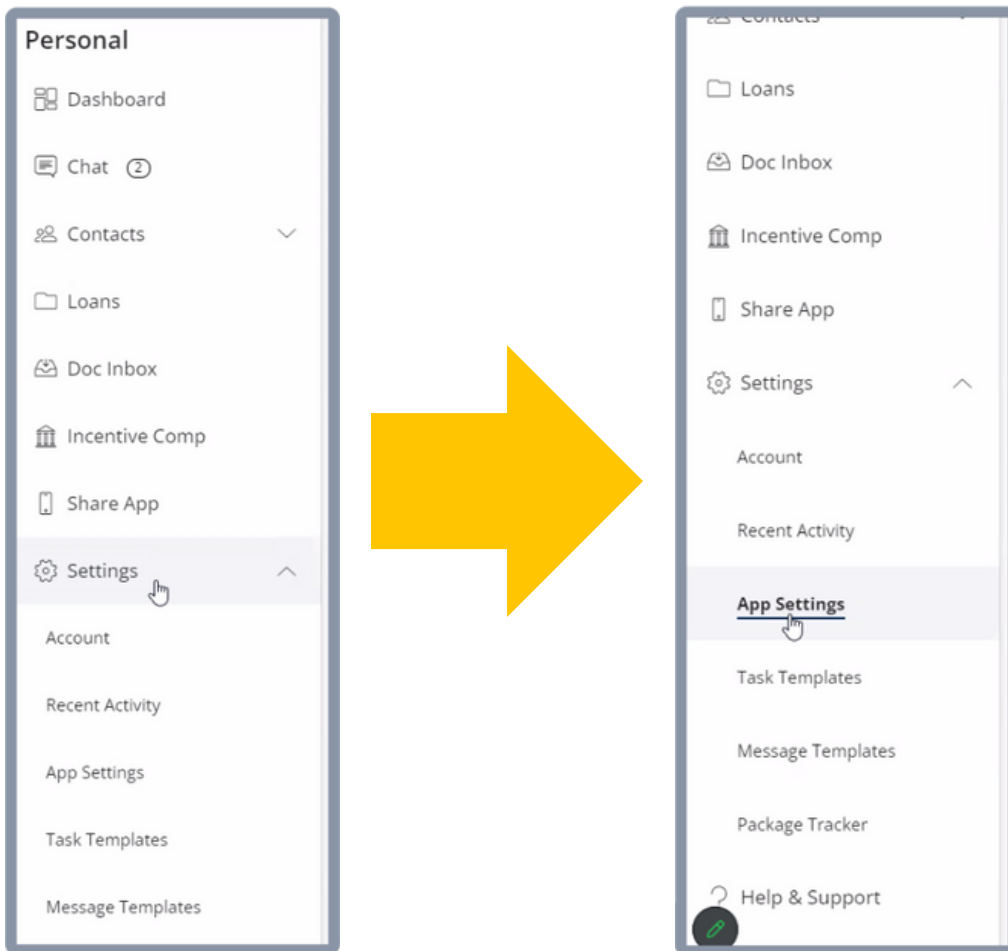
# Uplist Guide: nCino App Integration

This guide will walk through how to add your personalized Uplist links into nCino.

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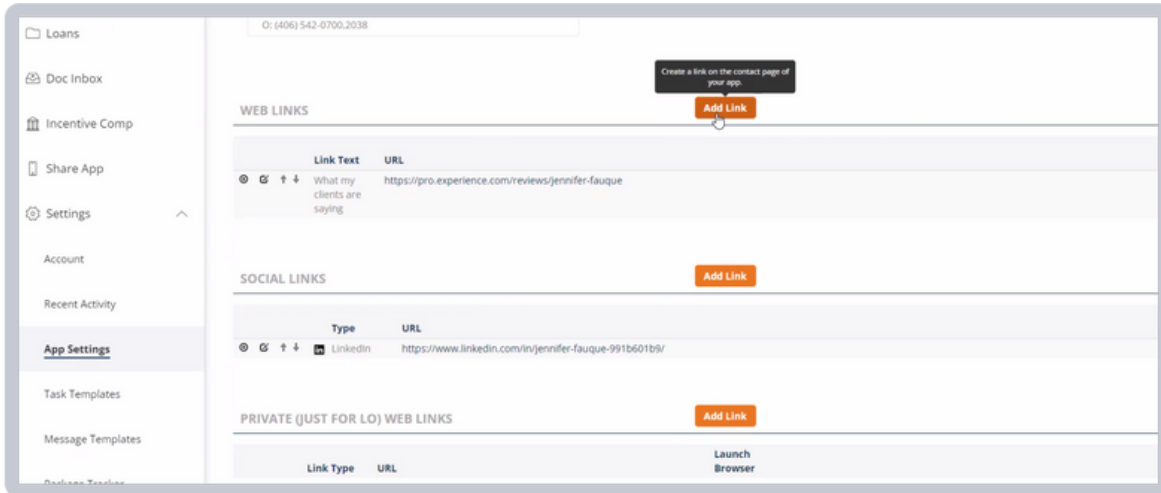
# Step 1.

**nCino App:** Select the 'Settings' dropdown menu from the 'Personal' navigation bar. Then select 'App Settings'.



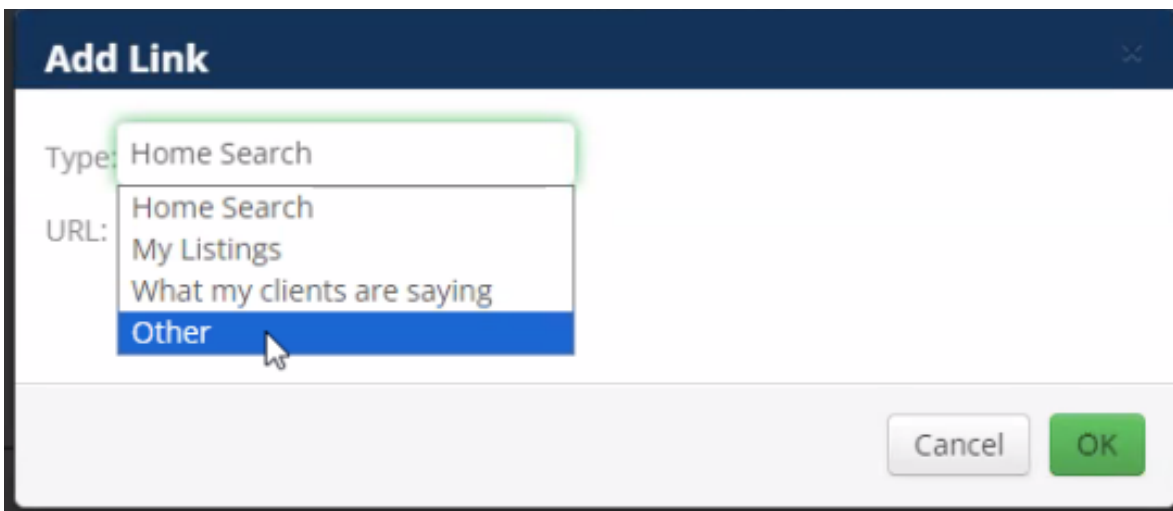
## Step 2.

nCino App: Under the 'WEB LINKS' section, select the 'Add Link' button



## Step 3.

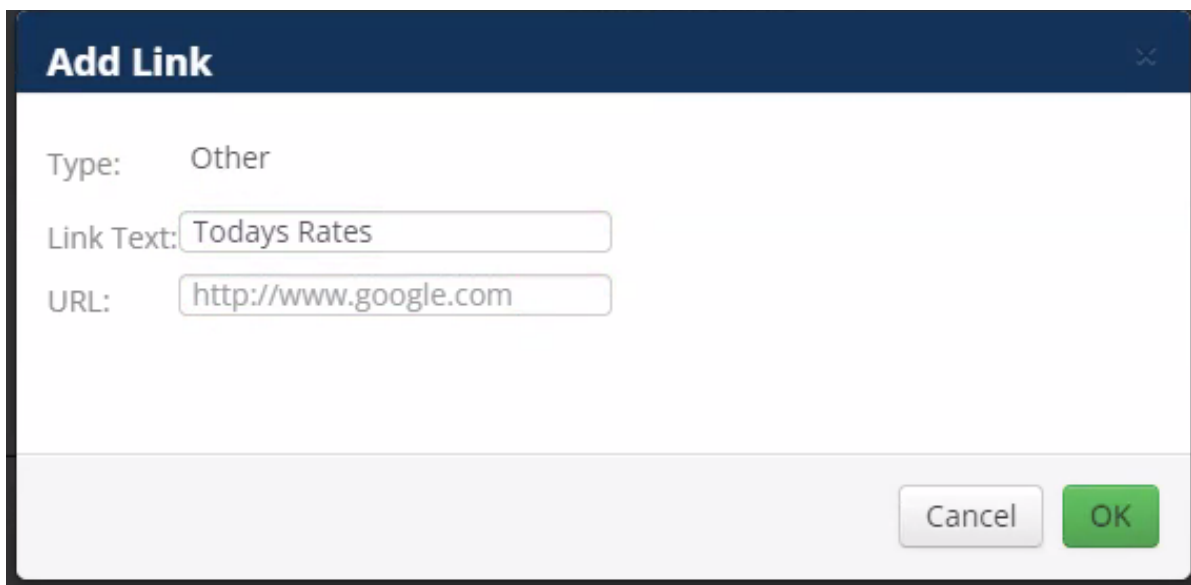
nCino App: Select the 'Type' dropdown select field and choose 'Other'.



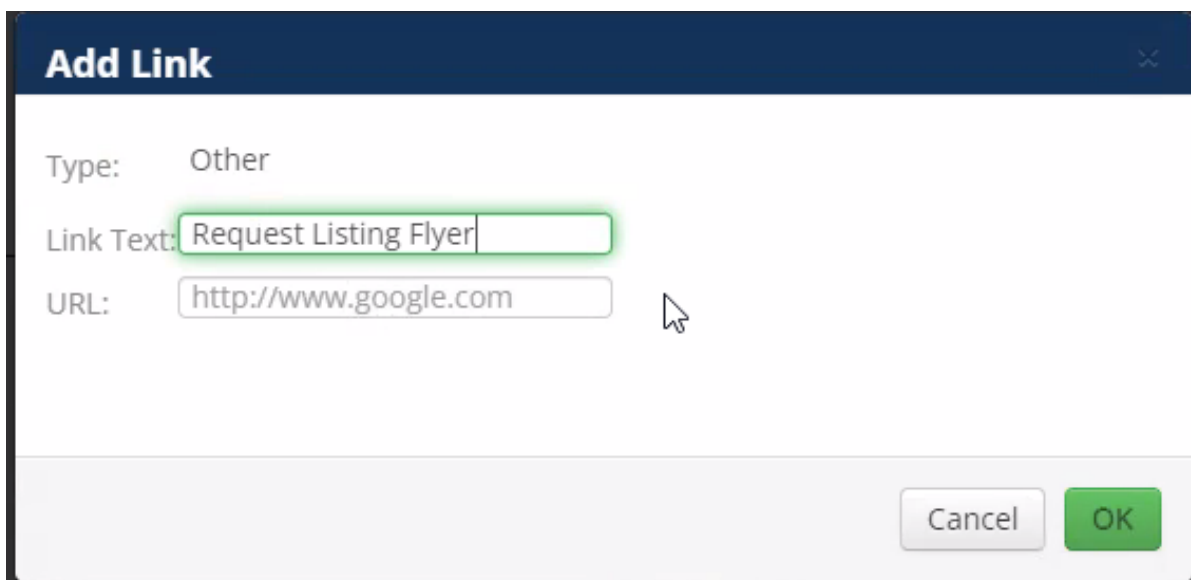
## Step 4.

**nCino App:** Change the 'Link Text' field to an applicable name for your specific link.

- ie: Link for buyers to Quick Quotes: 'Today's Rates'
- ie: Link for Listing Agents to request a SmartView Flyer: 'Request Listing Flyer'



The screenshot shows a dialog box titled "Add Link" with a close button in the top right corner. The "Type" field is set to "Other". The "Link Text" field contains the text "Todays Rates". The "URL" field contains the text "http://www.google.com". At the bottom right, there are two buttons: "Cancel" and "OK".



The screenshot shows the same "Add Link" dialog box. The "Type" field is still "Other". The "Link Text" field now contains the text "Request Listing Flyer", which is highlighted with a green border. The "URL" field still contains "http://www.google.com". A mouse cursor is positioned over the "URL" field. At the bottom right, the "Cancel" and "OK" buttons are visible.

## Step 5.

To add your Public Quick Quote url into nCino:

Log into your **Uplist instance**

- Navigate to the 'Quick Quote' section.
- Copy your personalized url
- Then **return to nCino custom web links section**
  - Paste in your copied url into the 'URL' field and click 'OK'
  - See images below

The screenshot shows the Uplist 'Quick Quote' form. The 'Public Quick Quote URL' field is highlighted with a red box and contains the URL 'https://uplist.co/apwell-mortgage/quick-quote/12345-us1000006'. A red arrow points to this field. The form includes fields for Home Value, Loan Amount, LTV, Credit Score, Property Type, State, County, Military/Veteran, Monthly Taxes, Homeowners Insurance, HOA Dues, Seller Credit, and Buydown. There are 'Purchase' and 'Refinance' buttons, an 'Advanced Search' link, and a 'GET PAYMENTS' button.

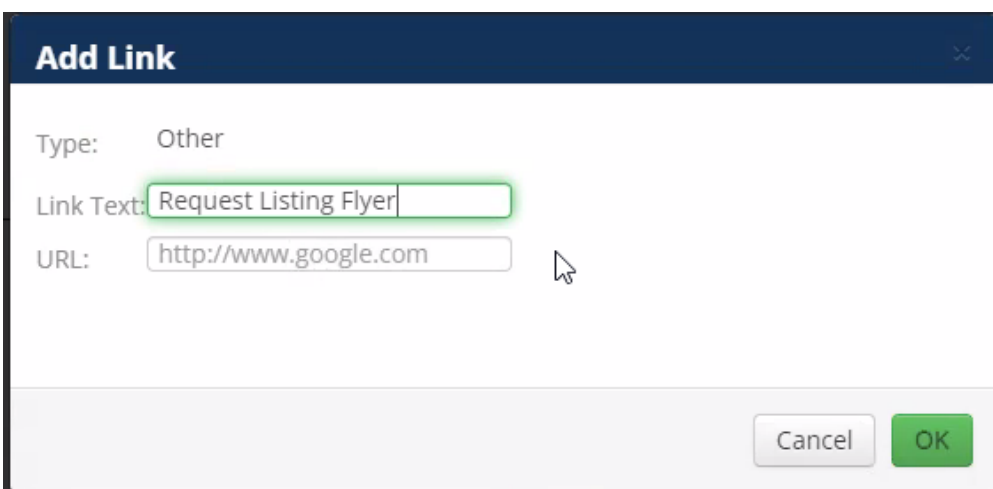
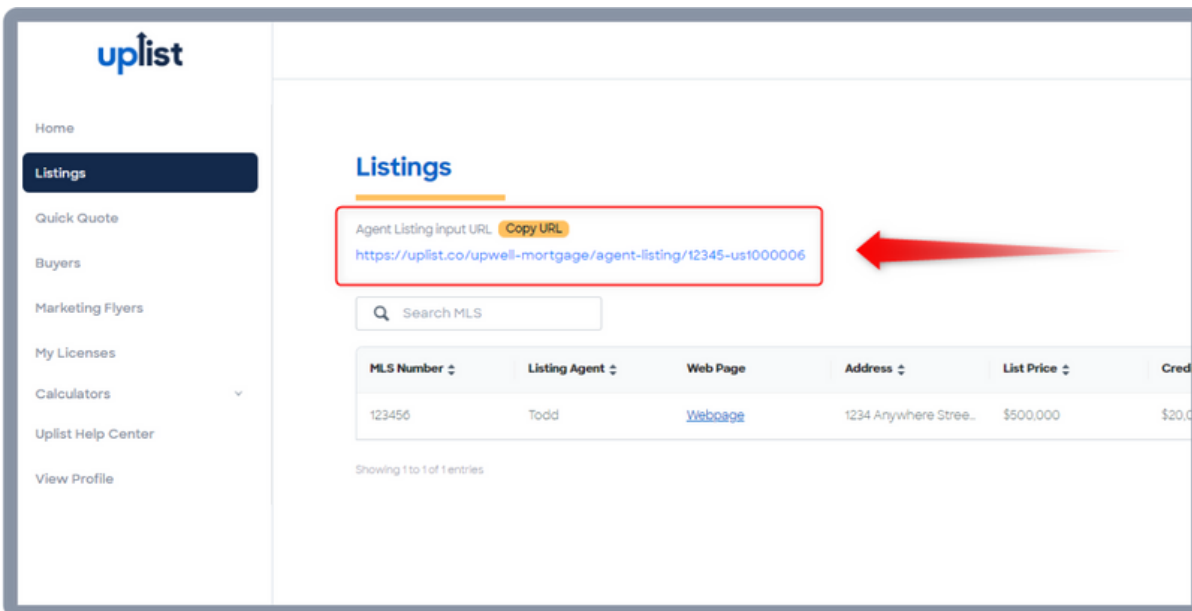
The screenshot shows the 'Add Link' dialog box. The 'Type' is 'Other', 'Link Text' is 'Todays Rates', and 'URL' is 'http://www.google.com'. There are 'Cancel' and 'OK' buttons.

## Step 6.

To add your Listing Agent Flyer Request url into nCino:

Log into your **Uplist instance**

- Navigate to the 'Listings' section.
- Copy your personalized url
- Then, **return to nCino custom web links section**
  - Paste in your copied url into the 'URL' field and click 'OK'
  - See images below





## Questions?

Contact [support@getuplist.com](mailto:support@getuplist.com)