QUICK GUIDE TO BROKER ONLINE SYSTEM PROCESSING

monmouthshire building society
INTERMEDIARIES

www.mbs-intermediaries.com

Online Applications (Residential purchase & re-mortgage only)

Google Chrome is the Preferred Browser ⬇

Log into http://www.mbs-intermediaries.com/ for the Intermediaries Website ⬇

Click on Broker Online http://www.mbs-intermediaries.com/e-broker/ ⬇

Apply for a Login – first time only (Intermediary Registration form may be required) ⬇

Login to Broker Online – existing Broker Online user ⬇

Once Logged In

Click on the **+ Create New Client** button ⬇

First name, surname, date of birth, road, town, postcode and home telephone number are mandatory fields ⬇

Save Client Details – confirmed successful will appear ⬇

If Joint Application – Create New Joint Application at this point – top right hand corner in **BLUE** ⬇

Create new client – option to Use Applicant 1 Address ⬇

Add joint applicant details and **Save Client Details** ⬇

Click on DIP icon

Complete all sections numbered 1 - 3 ⬇

Green or **yellow** will allow you to proceed. **Red** means mandatory question to complete in order to submit DIP.

DIP will be confirmed as successful or unsuccessful.

To start a new DIP, return to the Application Process Status and click on the DIP icon on the list on the left hand side of the page ⬇

Click on KFI icon

Proceed answering all questions, and once completed, click on Download or Next Step, which takes you to the first page of the MBS Residential Application Form ⬇

Click on Application icon

Work through screens answering all questions ⬇

When the Summary is reached, all sections must be **Green** or **Yellow**.

If **Red**, click on appropriate section to return to relevant section and ensure all highlighted questions are answered.

Once all sections are **Green** or **Yellow**, click Complete Application Form (**not submitted at this stage**).

Pop-up message confirms “You are almost ready to submit your application” – please upload some documents ⬇

Once uploaded, please click **Submit Application** ⬇

No documents to upload at this stage – please exit and follow instructions below when you next log in.

Upload Documents (MANDATORY TO SUBMIT THE APPLICATION)

In your Clients screen, click on the name of the relevant client. ⬇

In Application Process Status, scroll down to Client Documents and click Choose File ⬇

Select document to upload, and name in the File Description box.

Click on drop down menu below and choose most suitable description ⬇

Click Upload, then click Save. ⬇

Scroll to the top of the Application Status Process page, and click on the green **Submit Application** icon .