



How To Guide Broker Online





BROKER ONLINE FAQs

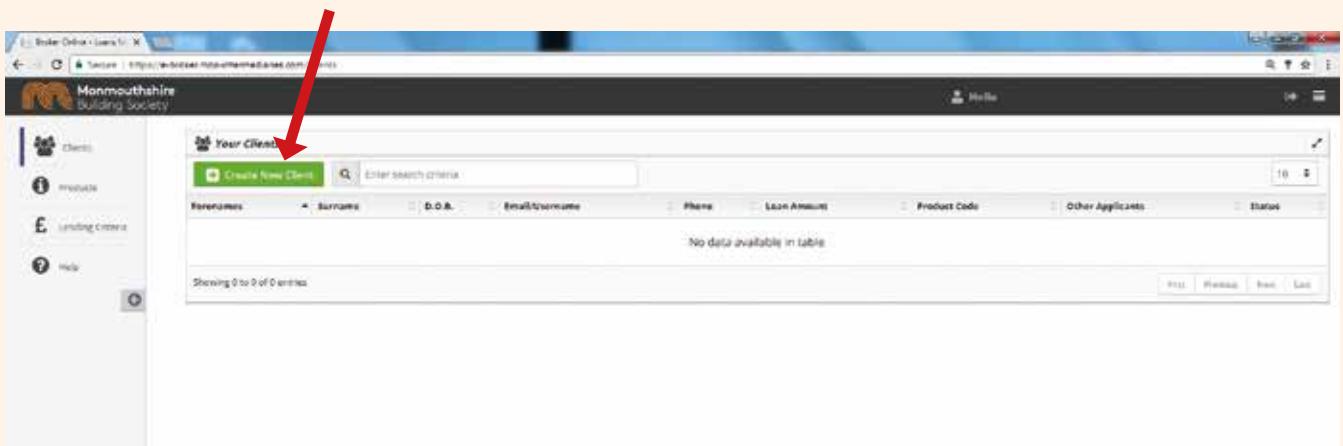
Contents

- How do I create a Client?3
- Creating a DIP4
- Other ways to create a joint application.....5
- If your client is already showing on the client list but isn't connected7
- How do I obtain a DIP?.....8
- How do I submit a mortgage application?..... 10
- Adding further documents after submission of application 14
- How to submit an application if the relevant documents are not available to upload at the time of completing information 14
- How do I print Documents off when submitted?.....15

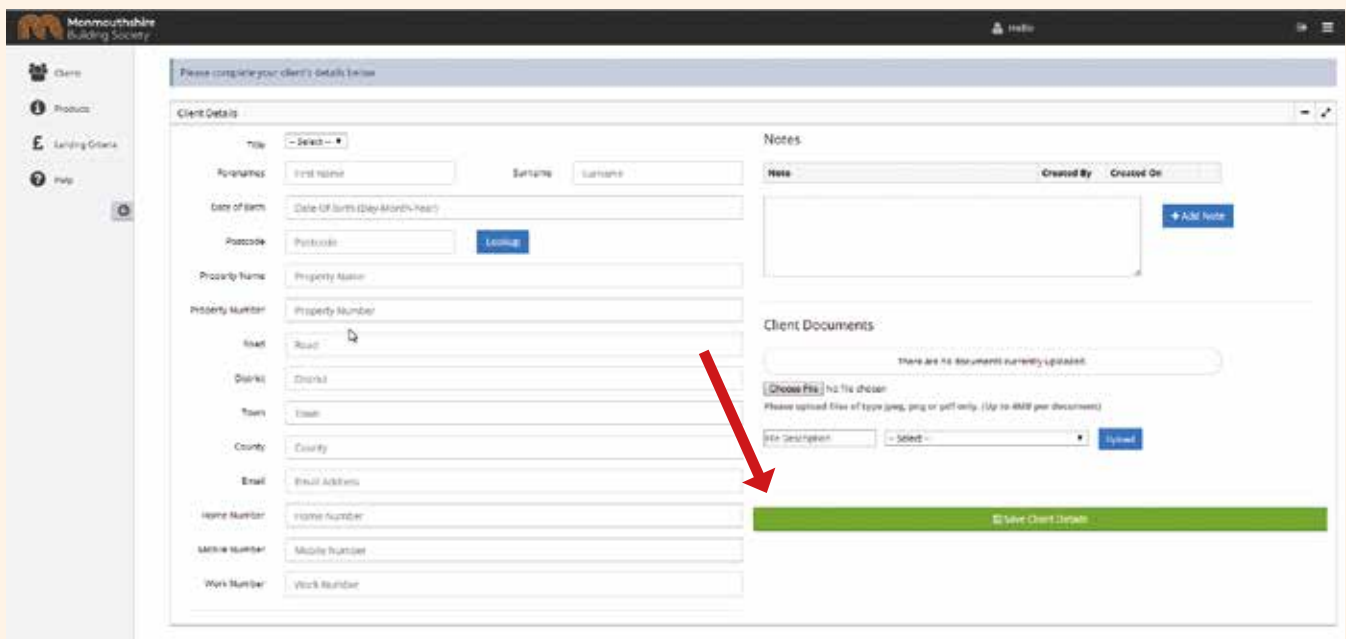
How to create a client?

Once logged in:

- Click on the **'Create New Client'** button in the top left hand corner of the screen.



- Complete the client details screen and click **'Save Client Details'**. Note, the first name, surname, date of birth, road, town, postcode and home telephone number are mandatory fields.

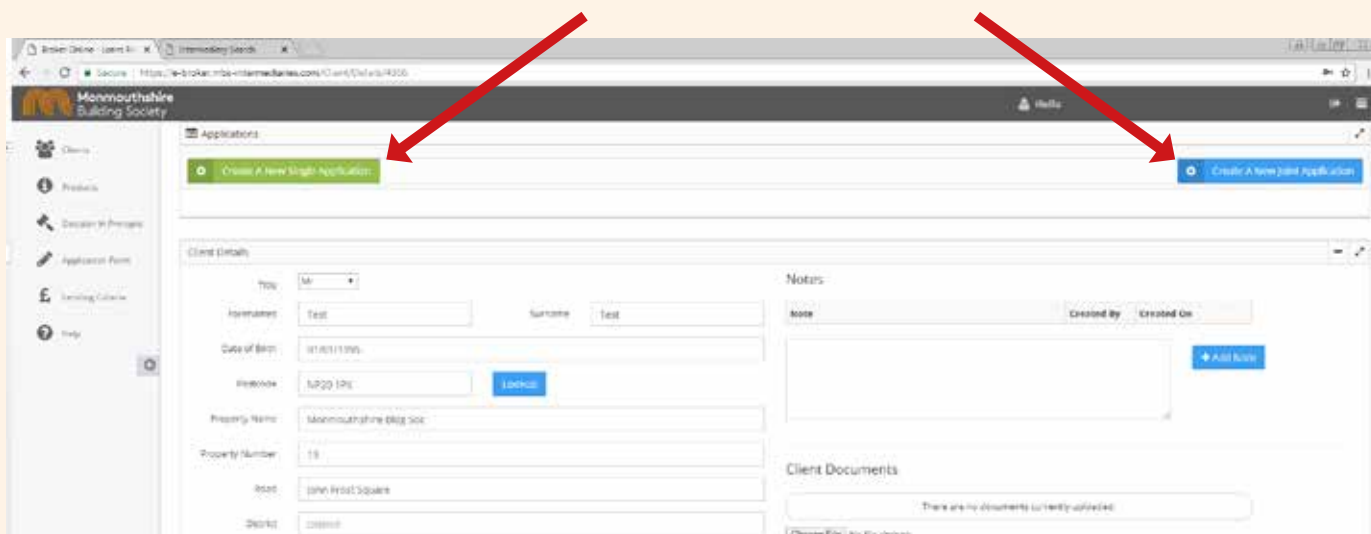


To create a Decision in Principle (DIP) you will have to **'Create an Application'**.

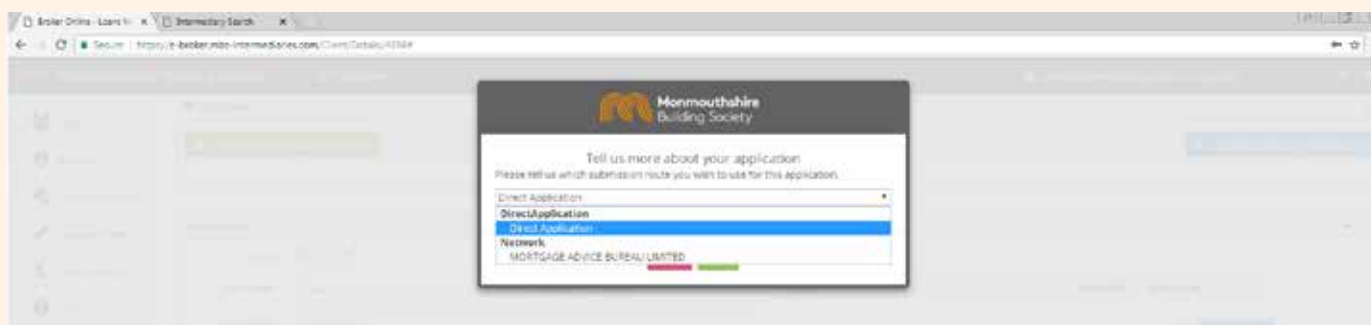
Please note that as soon as you click on the **'Next'** button you are saving information. This means that you can exit out of the client details and go back in at a later date to continue.

Creating a DIP

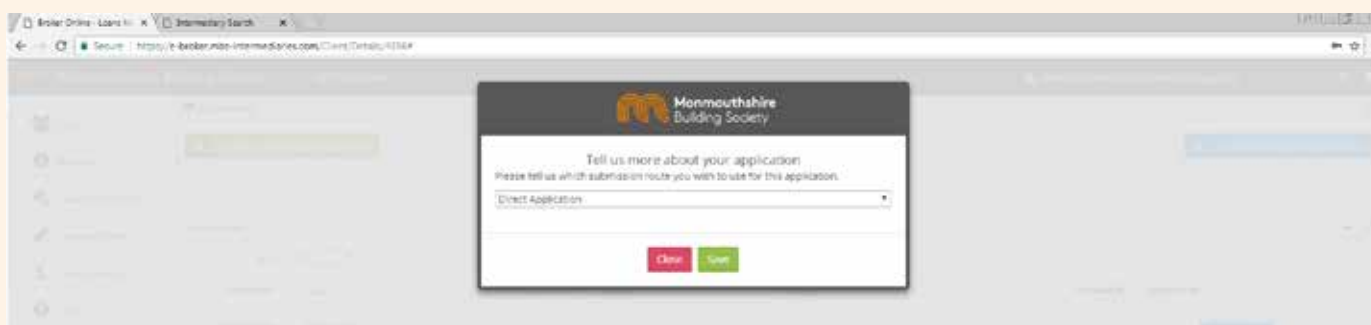
- Once you have created your client, select either '**Create a New Single Application**' at top left of the screen.
- Or if it is a joint application, click on '**Create A New Joint Application**' button at top right of the screen.



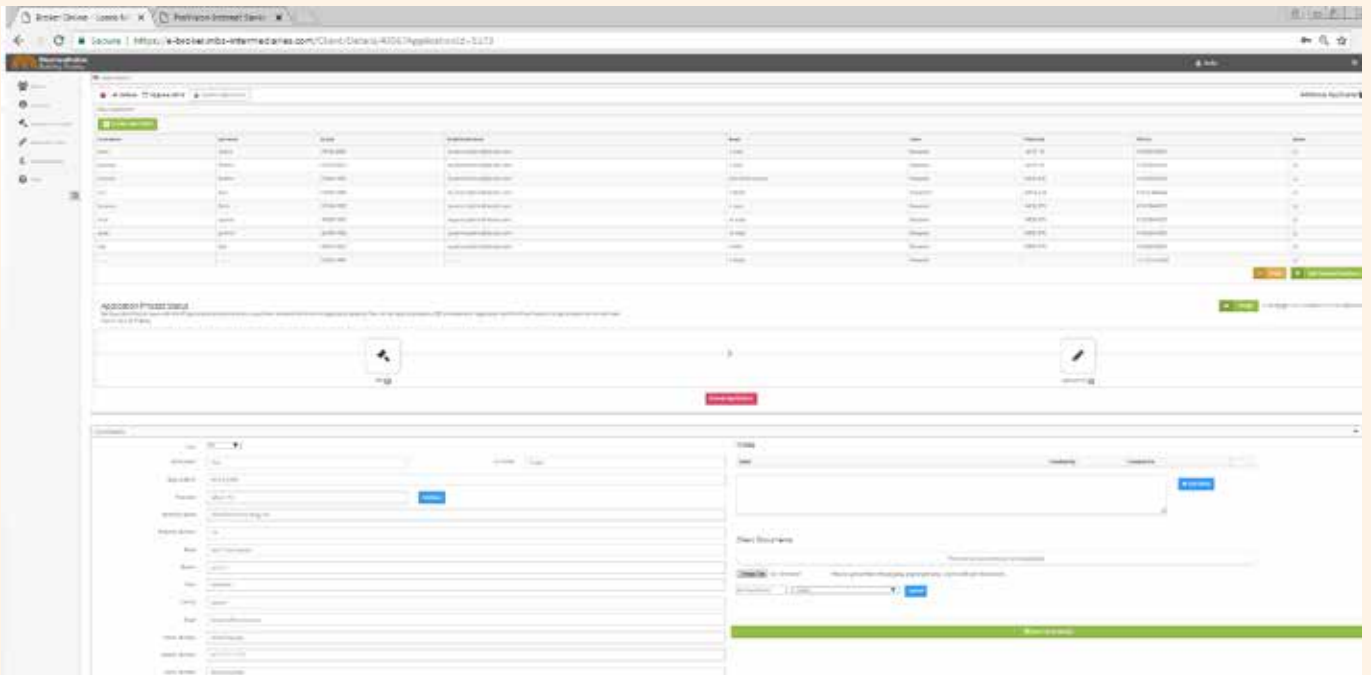
- Once you have asked to create a single or joint application a pop up box will appear asking for details of the submission route, either a '**Direct Application**' or under Mortgage Advice Bureau Limited network.



- Select appropriately and '**Save**'.

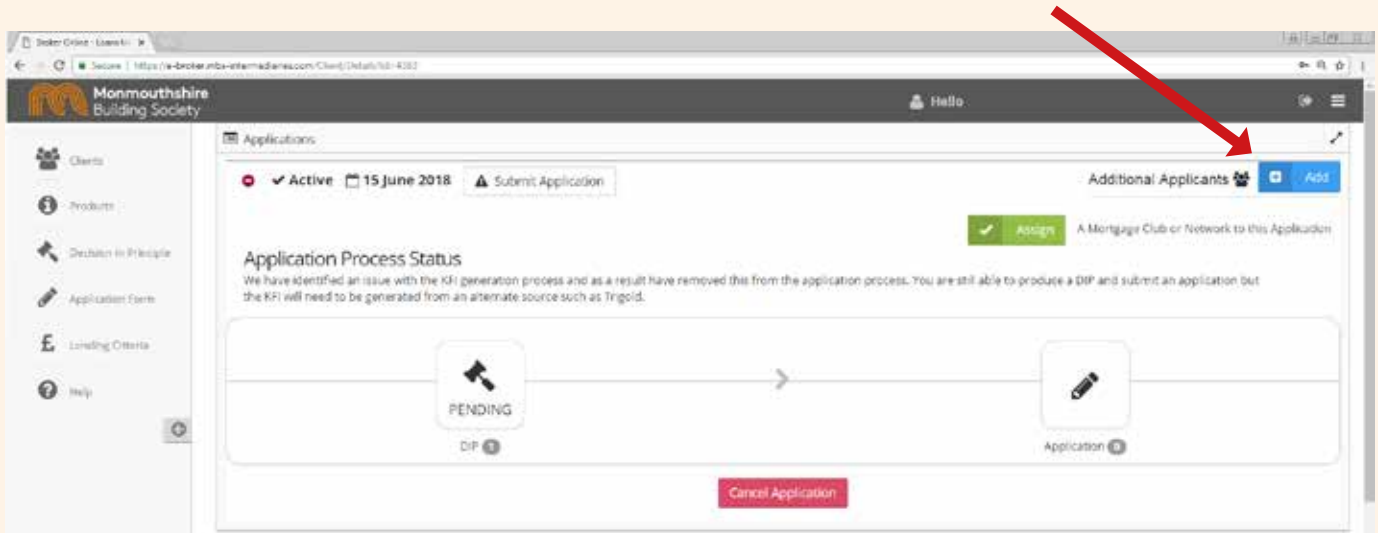


- You will then be taken to a view of your clients and the application process status of the client you have just set up.

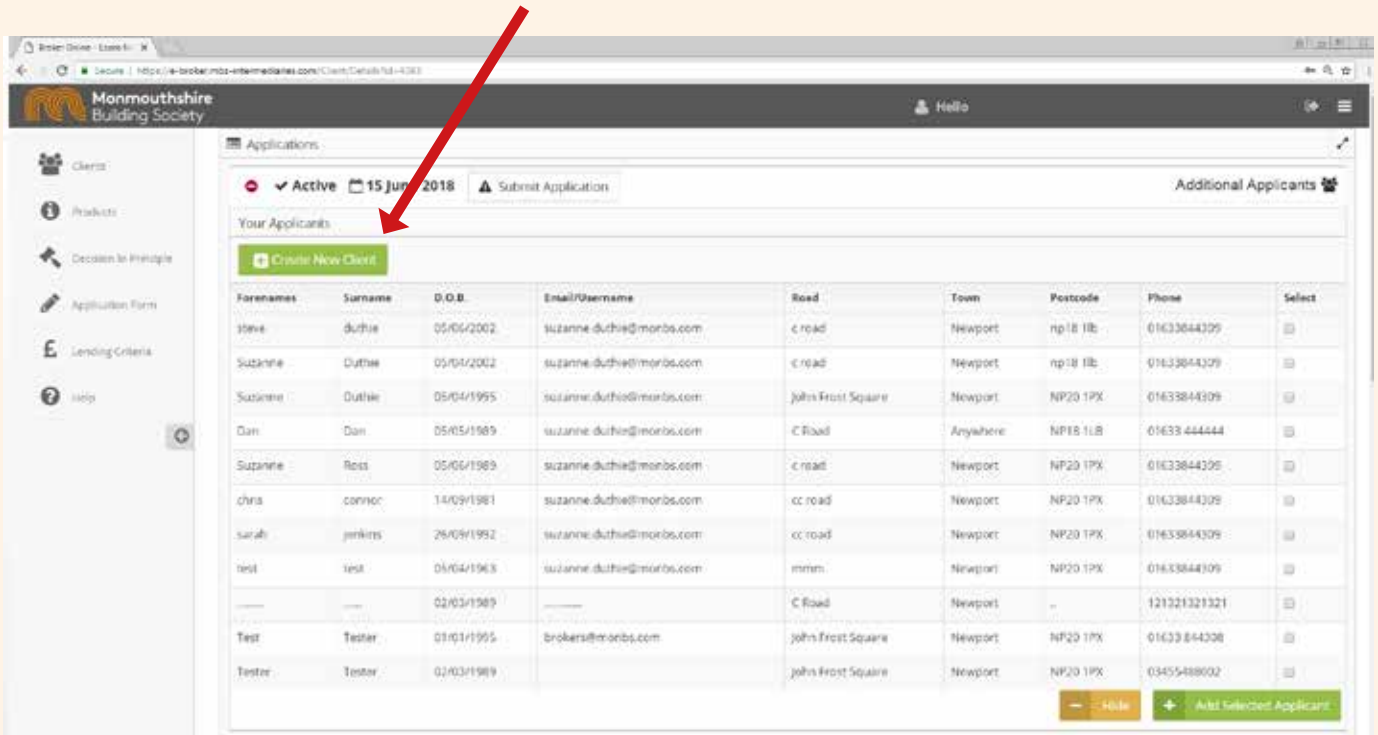


Other ways to create a joint application

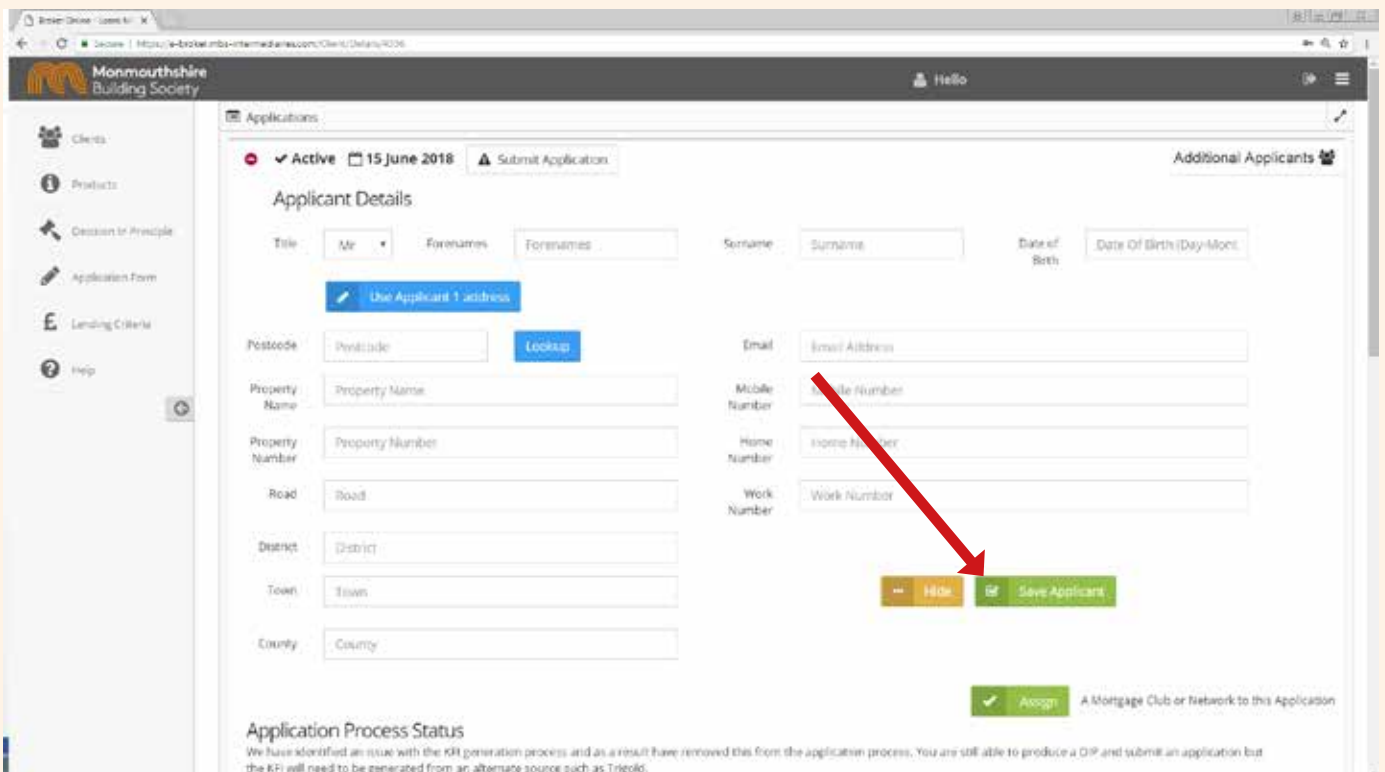
- Go to client view and click on client to view application details.
- Click on the **'Add'** button on the top right hand side.



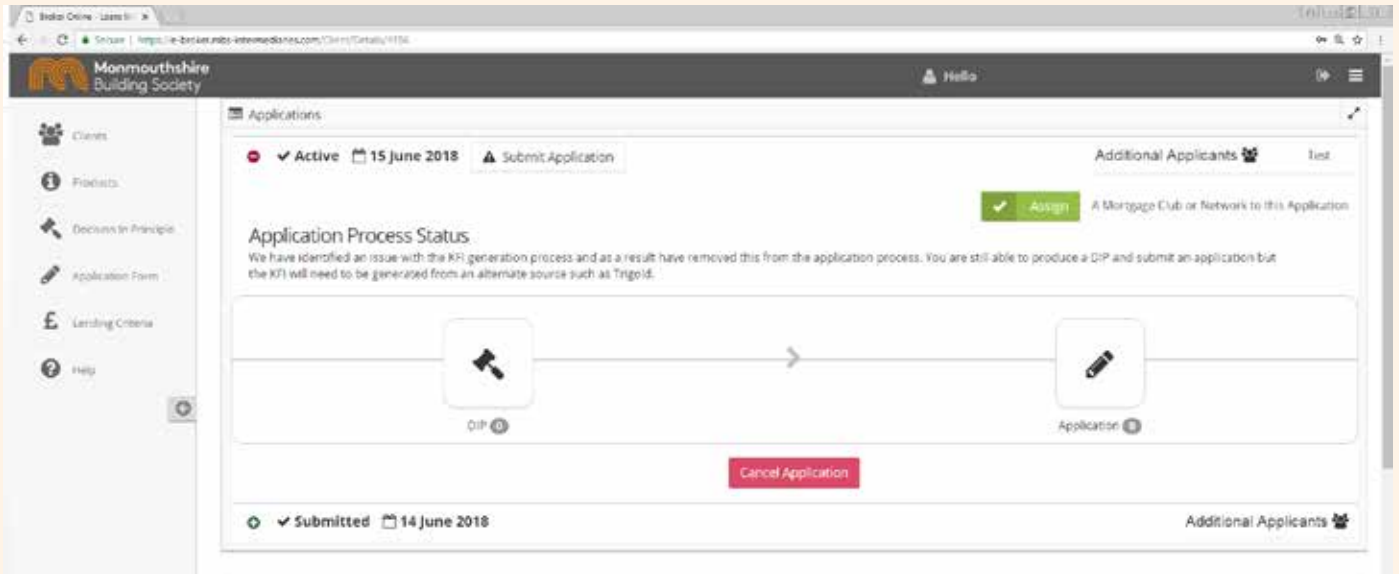
- This will then take you to your client list, click on the **'Create New Client'** Button to create the new applicant to be added to the application.



- Complete all fields and click on **'Save Applicant'**. The additional applicant will then be added.

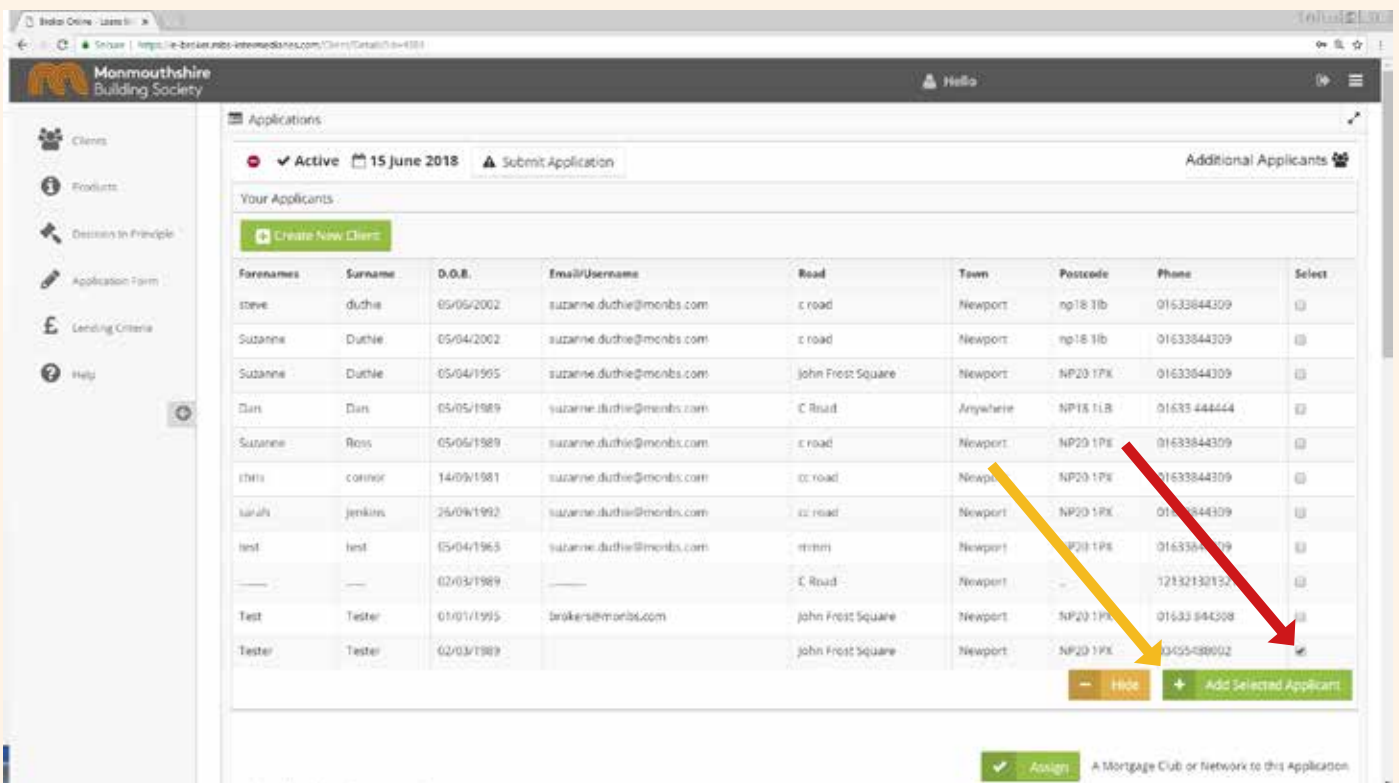


- This will then take you to the 'Application Process Status' page.



If your client is already showing on the client list but isn't connected

- If the client is showing in the list, select the tick box to the right hand side and then click on the select button to tick the box and then click on '**Add Selected Applicant**' at the bottom of the page.



How do I obtain a DIP?

- Once you have created your client click on the DIP icon.

The screenshot shows the 'Application Process Status' page. At the top, there is a table with columns for ID, Name, Date of Birth, Email, Status, Property, and Value. Below the table, a green 'Assign' button is visible. The main section is titled 'Application Process Status' and contains a flow diagram with two steps: 'DIP' (circled in red) and 'Application'. A red 'Cancel Application' button is located below the flow. Below the flow, there is a 'Client Details' section with fields for Title, Surname, Date of Birth, and Postcode. A 'Notes' section is also visible.

- Complete all sections ensuring all questions are answered and then review in the summary screen.

The screenshot shows the 'Summary' screen. At the top, there is a navigation bar with a 'Summary' button highlighted in blue. A red arrow points to this button. Below the navigation bar, there is a 'Summary' section with various data points. The data points are organized into sections: 'Decision in Principle - Preliminary Questions', 'Client Details', 'Client's Income Details', and 'Client's Expenditure'. Each section contains a list of items, such as 'Documents', 'Client Information', 'Property to be Mortgaged', 'Client Details', 'Mortgage Requirements', 'Income Details', and 'Client's Expenditure'.

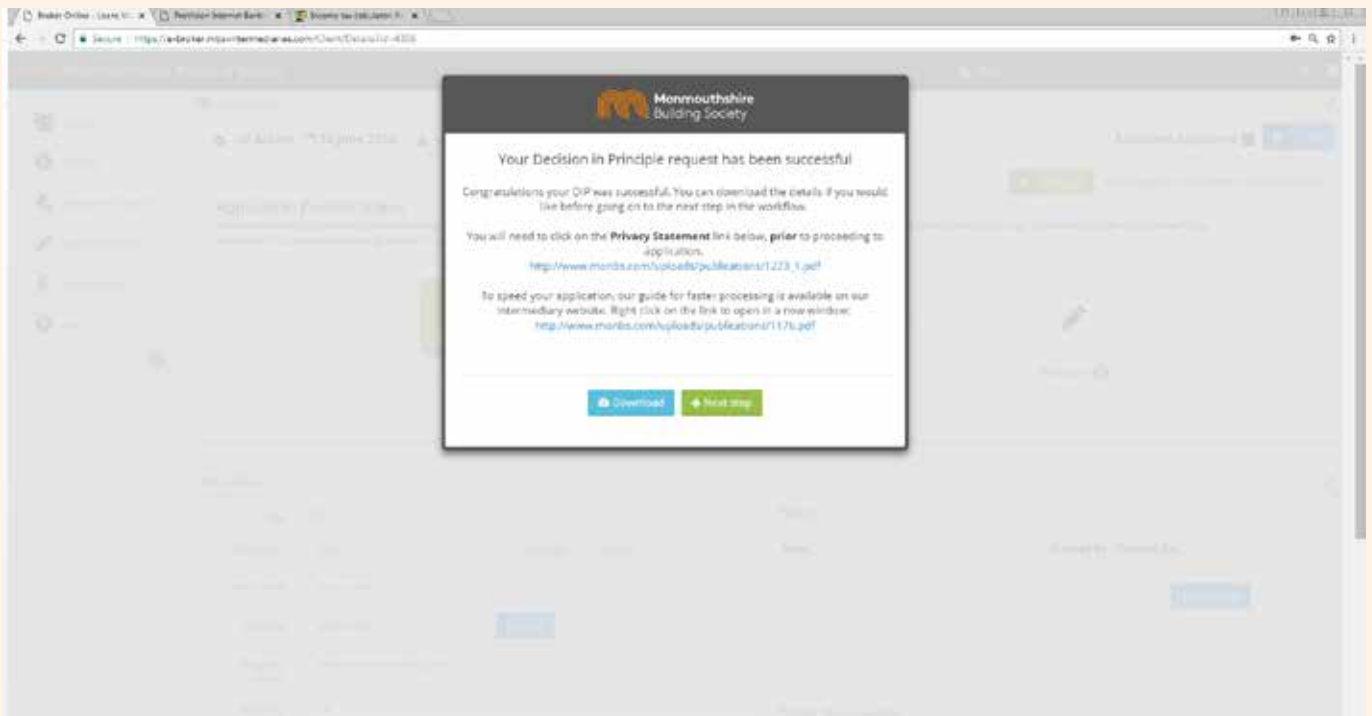
- Make sure the sections numbered 1-5 across the top of the screen are coloured **green**.

If any are coloured **red**, this means that essential information is missing and you will not be able to submit the DIP. If this happens, click on the appropriate section and complete all highlighted fields.

- Once you are happy with the summary screen, click '**Complete DIP Form**' in the bottom right hand corner.



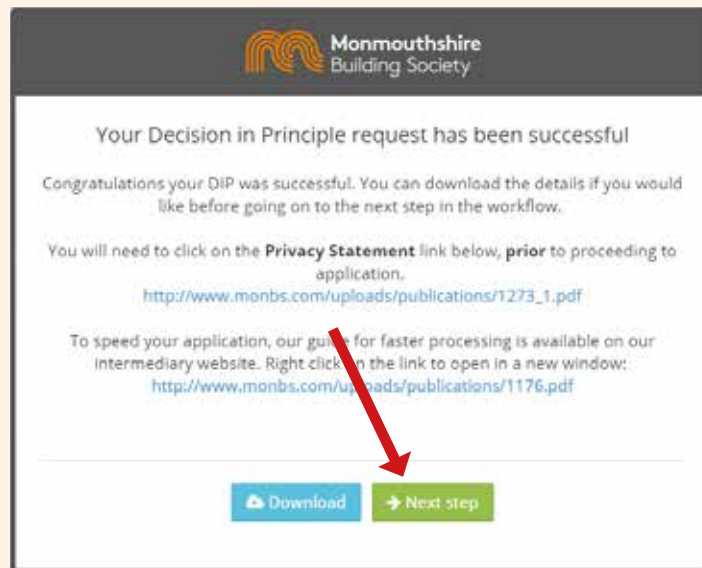
- A pop-up box will display to show whether the DIP is successful or not and you can either download the DIP or proceed to the next step.



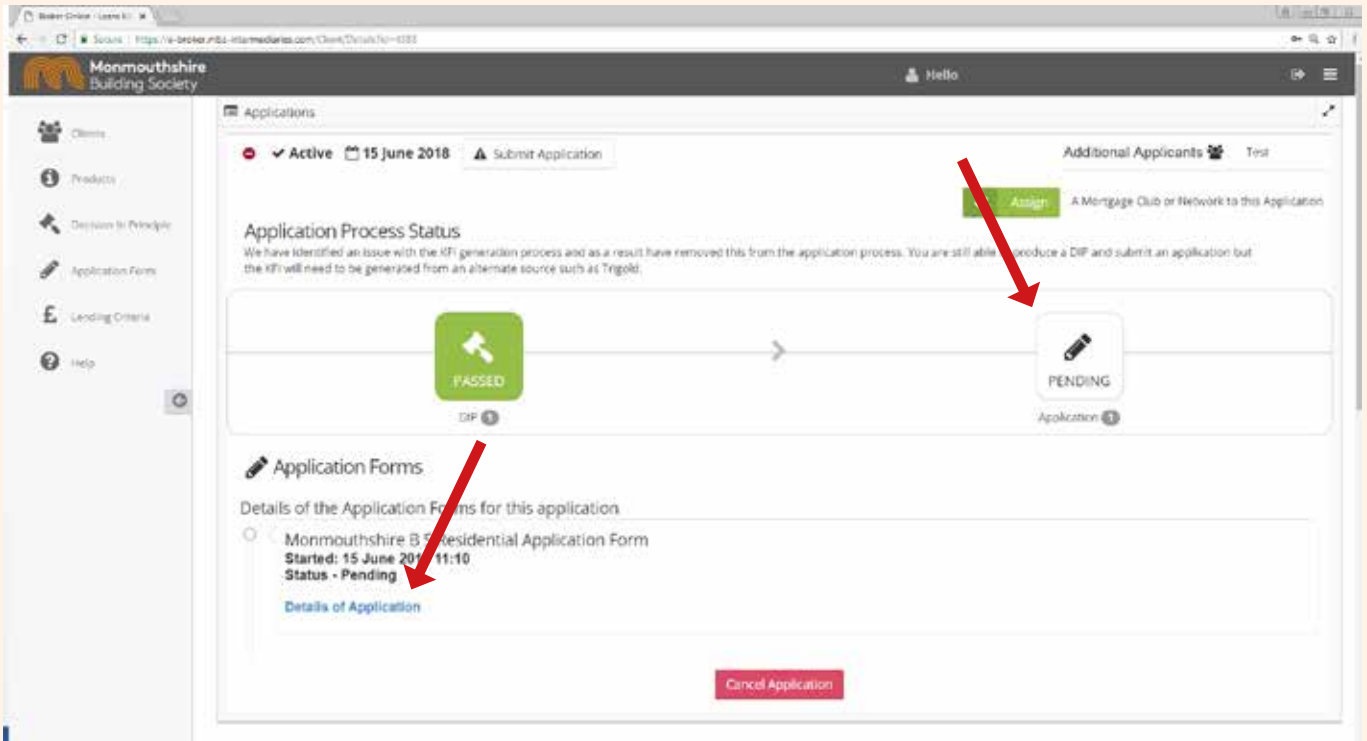
- Please note Privacy Statement with link.
- If the DIP is unsuccessful please contact the **Broker Sales Helpdesk** for further information.
Telephone: **01633 844 380**
Email: **brokers@monbs.com**

How do I submit a mortgage application?

- You cannot complete a mortgage application form until you have completed the DIP.
- Once you have completed the DIP,
- Click on the **'Next Step'** button from the DIP confirmation box to proceed onto the application.



- If you have logged out of the system and wish to complete details at a later stage, login, select client from client view and click on the application icon.
- Then click on **'Details of Application'**, this will open the form for completion.



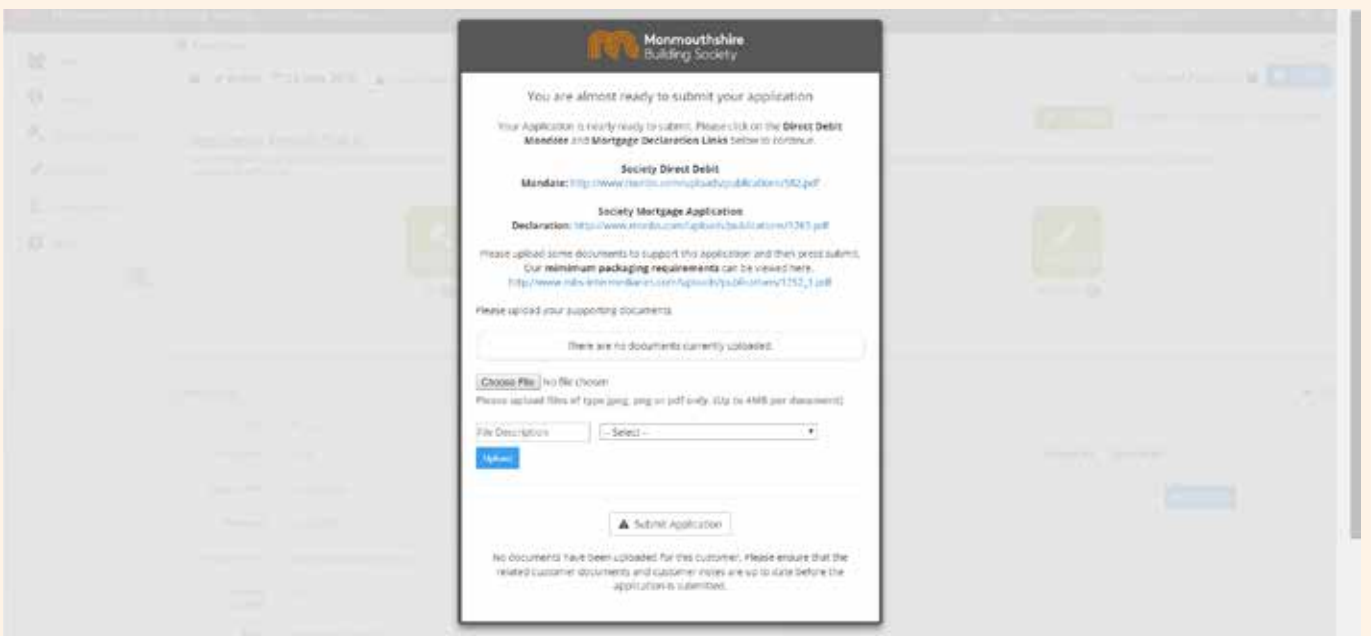
- When you reach the summary screen, check that all sections are coloured green or yellow. If any are red, click on the appropriate section at the top of the screen and make sure that all highlighted questions are answered. If any sections are yellow, this means that non-mandatory information is missing, however, application can still be submitted.



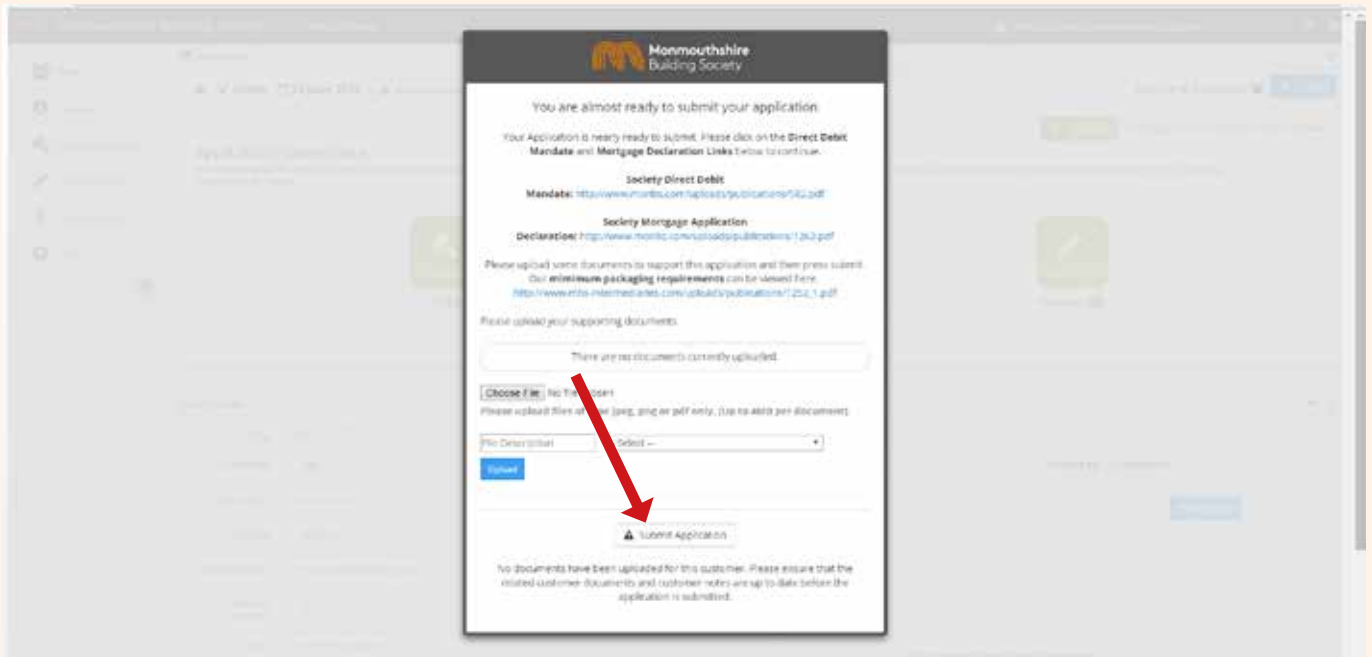
- Once all the sections have been completed, click '**Complete Application Form**' in the bottom right hand corner of the screen. At this point you have **not** submitted the application.



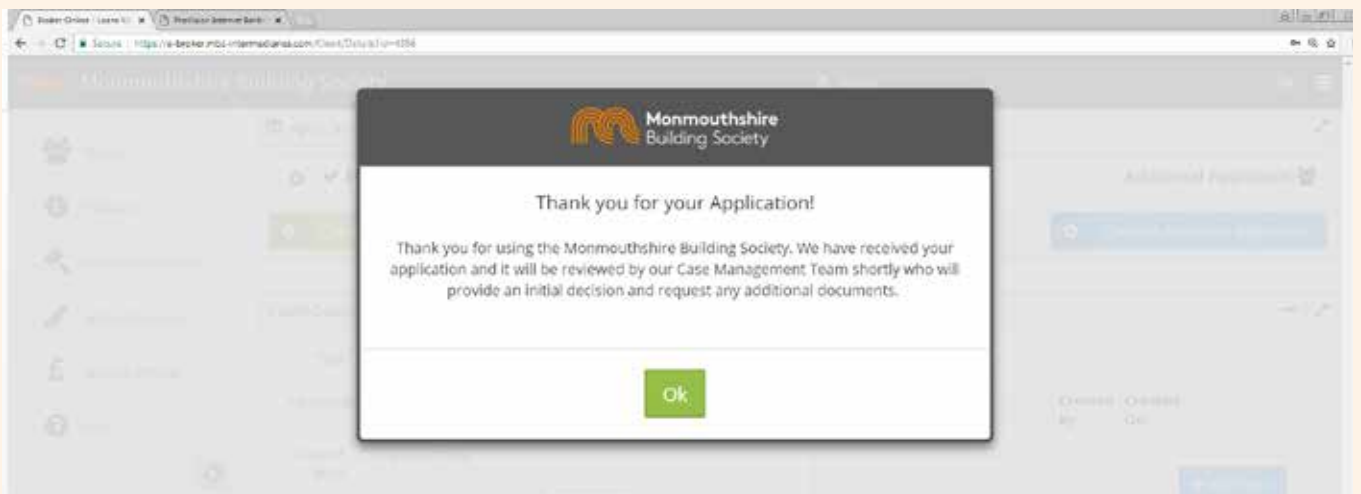
- A pop-up message confirms you are '**Almost Ready**' to submit your application. Please upload supporting documents by clicking on '**Choose File**' button, naming the document and select type of document from drop down box. You **must** upload documents in order to submit your application.



- Your uploaded documents will be listed in the pop-up box with a tick and confirmation that the upload is successful.
- Once all the relevant documents have been uploaded, click on the '**Submit Application**' button on the pop-up.

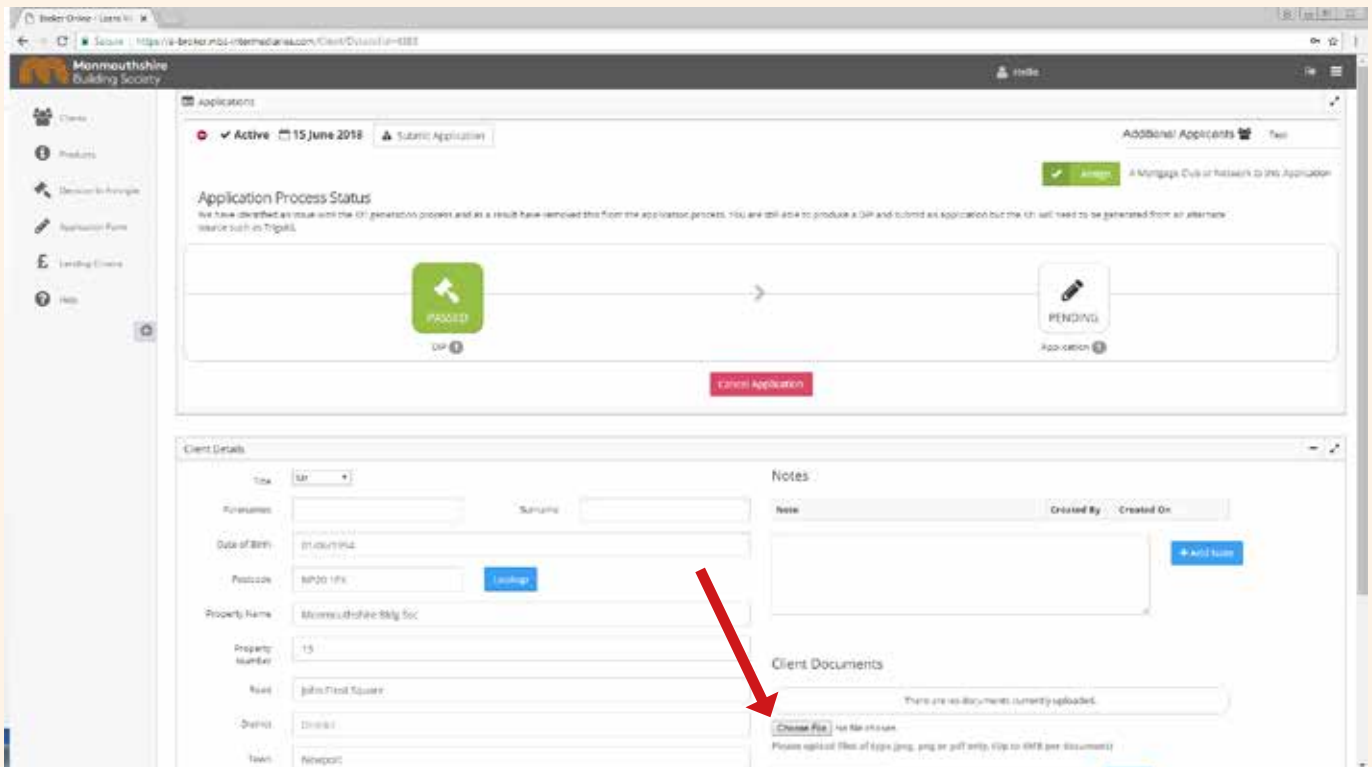


- A pop-up box will appear to confirm you have submitted the application.

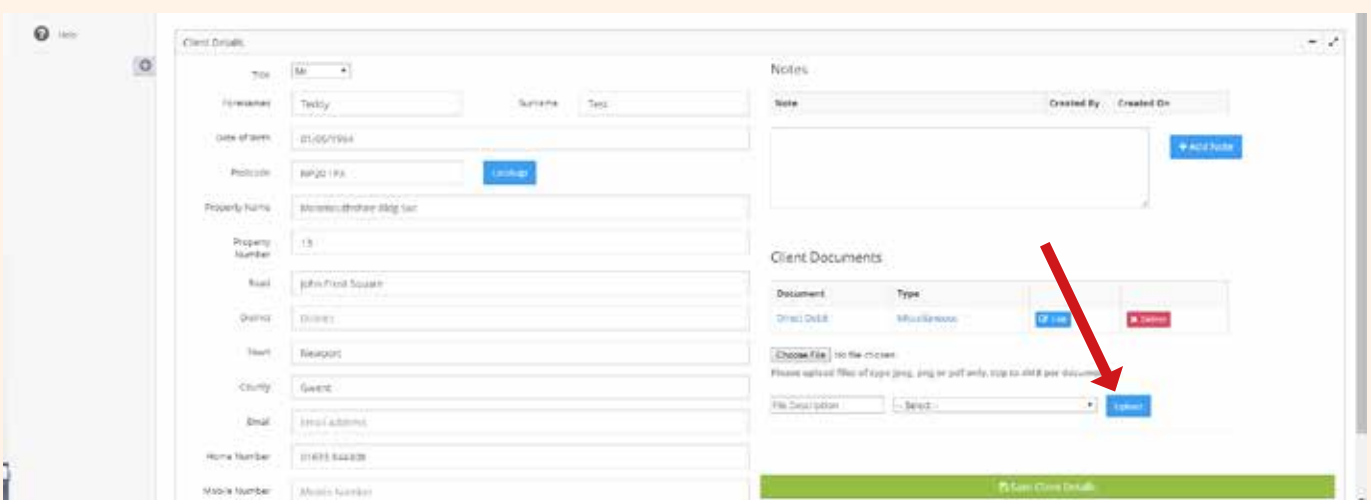
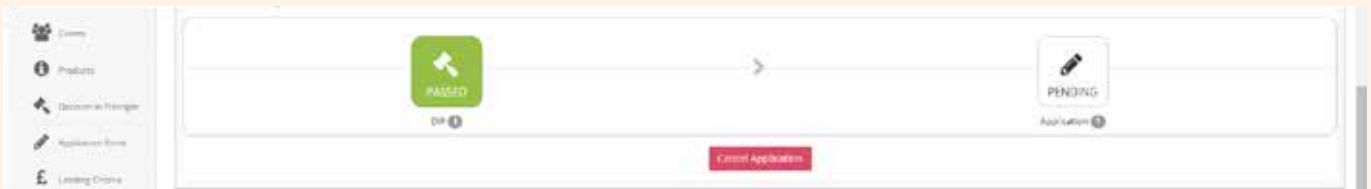


How do I upload documents before I have completed application details?

- In the 'Your Clients screen', click on the name of the relevant client. Scroll down to 'Client Documents' and click 'Choose File'.



- Select the document you wish to upload, then give the file a name in the file description box. Click on the drop down menu immediately adjacent and choose the description which best suits the document. Click 'Upload' button. The document should then appear in the list of 'Client Documents'.



Adding further documents after submission of application

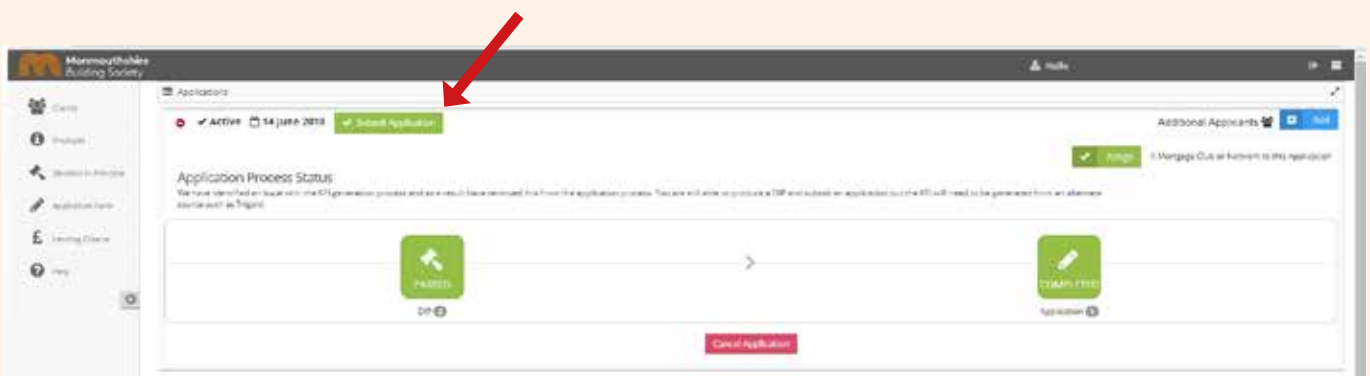
- Use the same steps as shown in 'How do I upload documents before I have completed application details?'

How to submit an application if documents not available to upload at the time of completing information?

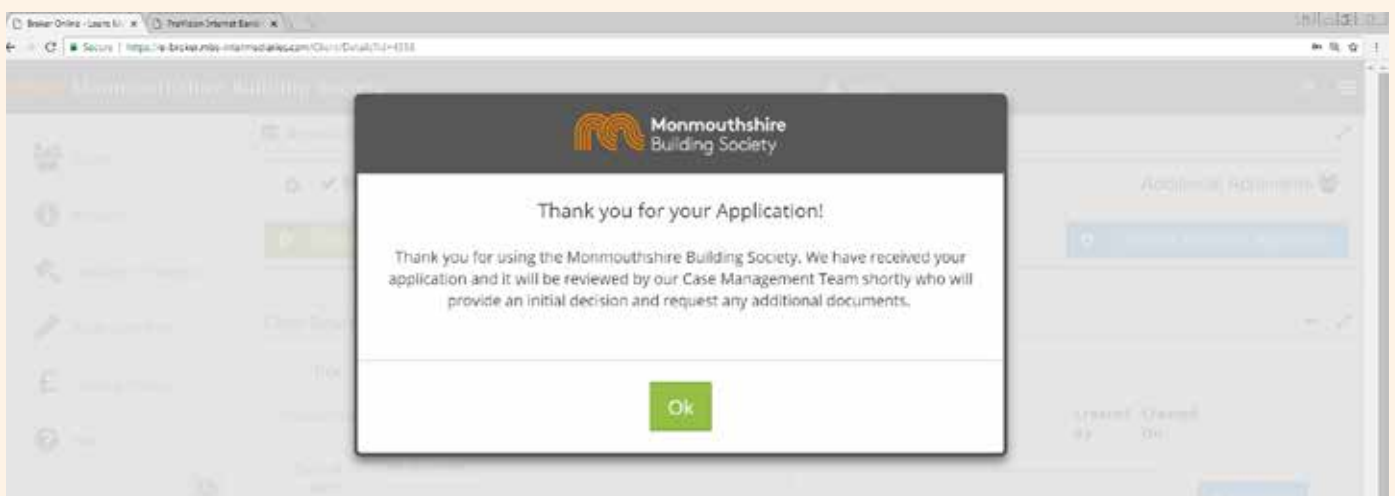
- Go to your client view and select relevant client.

Person	Surname	DOB	Email Address	Phone	Loan Account	Product Code	Other Applications	Status
John	John	12/01/1980	john.d@monbs.com	0113844331	142700		System Flow	Active
Jan	Jan	25/07/1980	jan.d@monbs.com	0113844331	80000	1 Year Discount Purchase (201)		Active
John	John	12/01/1980	john.d@monbs.com	0113844331	40000	1 Year Fixed Purchase (20)	System Flow	Active
Suzanne	Suzanne	02/04/1945	suzanne.d@monbs.com	0113844331	30000	1 Year Discount Mortgage (201)	System Dishes	Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000		Search Linking	Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active
Neil	Neil	01/04/1951	neil.d@monbs.com	0113844331	100000			Active

- This will then take you to the 'Application Process Status' page.
- Click on the 'Submit Application' button.

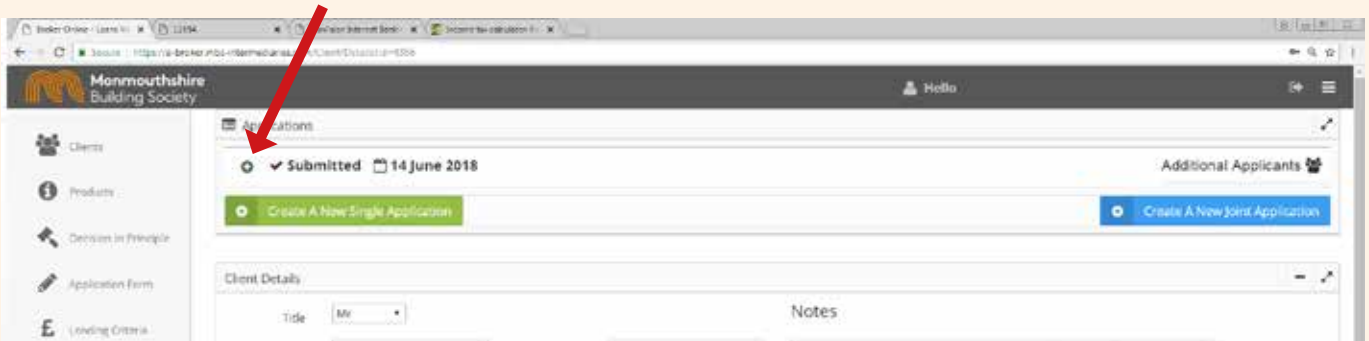


- A pop-up box will appear to confirm you have submitted the application.

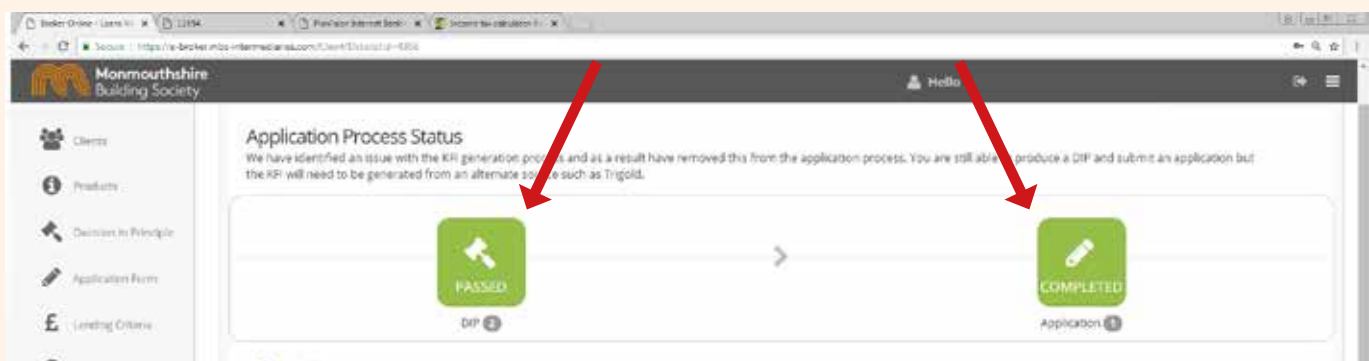


How do I print Documents off when submitted?

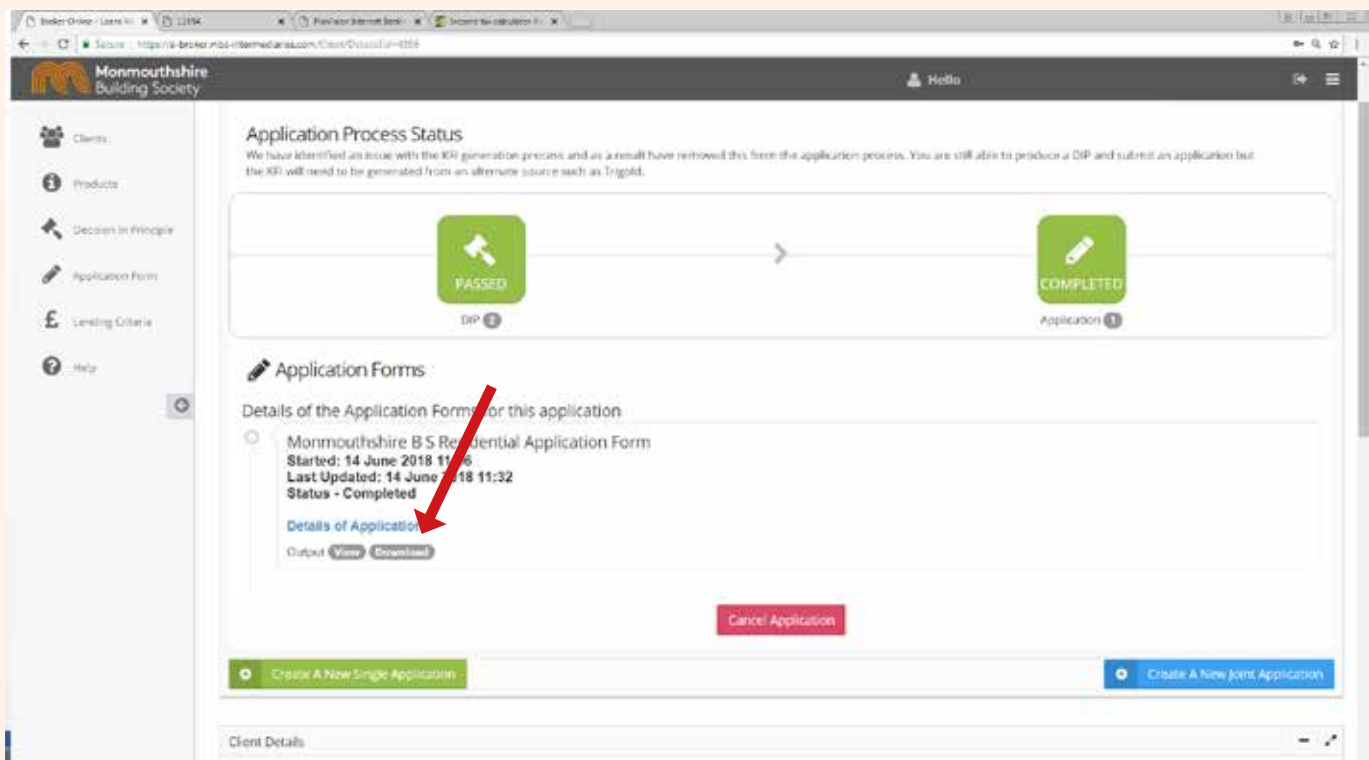
- If you wish to view the DIP's, and applications connected with a submitted case, open the client then click on the green '+' symbol at the top of the screen, which will open up the client view.



- Now click on the 'DIP' or 'Application' icon to access the details you require.



- The screen should then display details and select whether you wish to view the form or download to print out.





Monmouthshire House, John Frost Square, Newport, NP20 1PX Tel: 01633 844 444 Fax: 01633 844 445
Telephone calls may be monitored and/or recorded for security and training purposes.

Monmouthshire Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register Number: 206052.

BG(06/18-1)