

Intermediaries and investment
professionals only: not for public
distribution

August 2018

Mortgage administrator user guide

Contents

This guide shows you how an intermediary can request a new admin user as well as how an admin user can submit and track an application.

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Requesting a new
admin user by an
intermediary

01

Step 1: new admin user request

- Go to Introducer Internet > Tools > Request a new admin user.
- Click on the link to the admin user registration form.
- The admin user registration form should be completed and signed by an appropriate person in your intermediary firm, e.g. Director, Partner, Principal.
- The completed form can be either uploaded to us via Introducer Internet > Tools > Request a new admin user **or** faxed to 0845 602 3293.

you are in Tools > Administrative Users > Request a new Admin User

Request a new admin user

To request a new Admin user to be created, please download this [form](#). Print it out, fill in the required details and sign it. Then please scan the form and upload it below.

Please enter a brief description of what you are requesting. *

Please can I add a new admin user to my account

Upload the completed request form

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Mortgage Administrator

Registration form - Admin User for Introducer Internet

FOR INTERMEDIARIES

Please fill in the form using BLOCK CAPITALS and black ink. Tick any boxes which apply.

To be completed by the Intermediary firm to request registration of an Admin User for Introducer Internet. Once we have approved and registered the administrator on our system we will email them with their unique log in and password and then telephone them with their unique passcode.

1 Requestor details

Name of person making the request Position in intermediary firm

2 Firm details

Name of intermediary firm Telephone number

FCA number Fax number

Registered address Email address

Postcode

3 Admin User - personal details

Title
Mr Mrs Ms Miss Other

Date of birth

Place of birth (town and country)

Nationality (including dual nationality, if applicable)

Nationality Insurance number

Country of residence

Current residential address

Postcode

Work telephone number (for the admin user)

Work email address (for the admin user)

Alias used (if applicable)

Alias title
Mr Mrs Ms Miss Other

Alias first name

Alias middle name(s)

Alias surname

Step 2: admin user security details

- We set up and email the admin user directly with their company/Introducer ID and password.
- We contact the admin user by phone to give them their one time passcode.




Company/Introducer ID password






One time passcode



Step 3: adding the admin user

- To associate an intermediary with an admin user, an intermediary will need to access Introducer Internet > Tools > Manage my admin users and then click on the  to add the admin user to their account.
- Admin users must be associated with at least one intermediary before they can log on to Introducer Internet.

You are in [Tools](#) > [Administrative Users](#) > [Manage my Admin Users](#)

Manage my admin Users

Below are all the Admin users that are in your company. Click on the  button to enable an administrative user to work with your cases. Click on the  button to disable an administrative user from having access to you cases. Click on the  button to re-enable an administrative user that has expired.

Admin User ID	Admin User Name	Email Address	Current Status	Last logon	
	adding new admin user				
	admin user added		Active Association	N/A	

Step 4: admin user first time log in

- Once the admin user has been added to a broker's profile, the admin user will be able to log on to Introducer Internet for the first time using their Company/Introducer ID and password which were sent by email, and the one time passcode.
- The admin user will then need to change their password and passcode – Introducer Internet > Tools > Change password.

You are in [Tools](#) > [User Tools](#) > [Change password](#)

Change password and passcode

To change your password and passcode enter your details below. You will need to change both. For assistance with good password practice, [click here](#).

Current password

Current passcode

New password

New passcode

Confirm new password

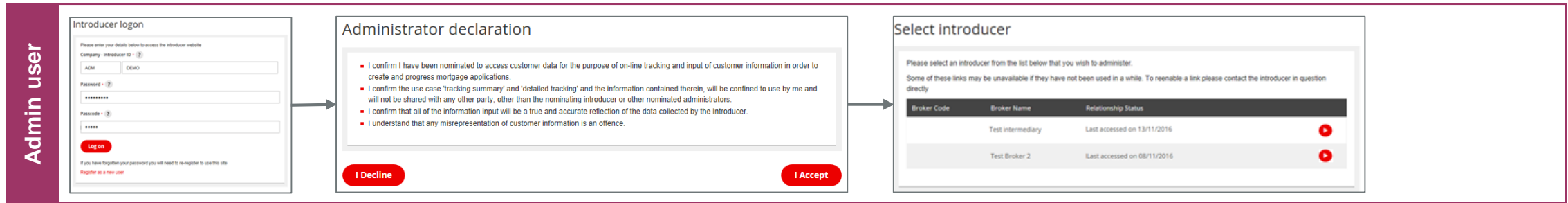
Confirm new passcode

Submitting an
application as an
admin user

02

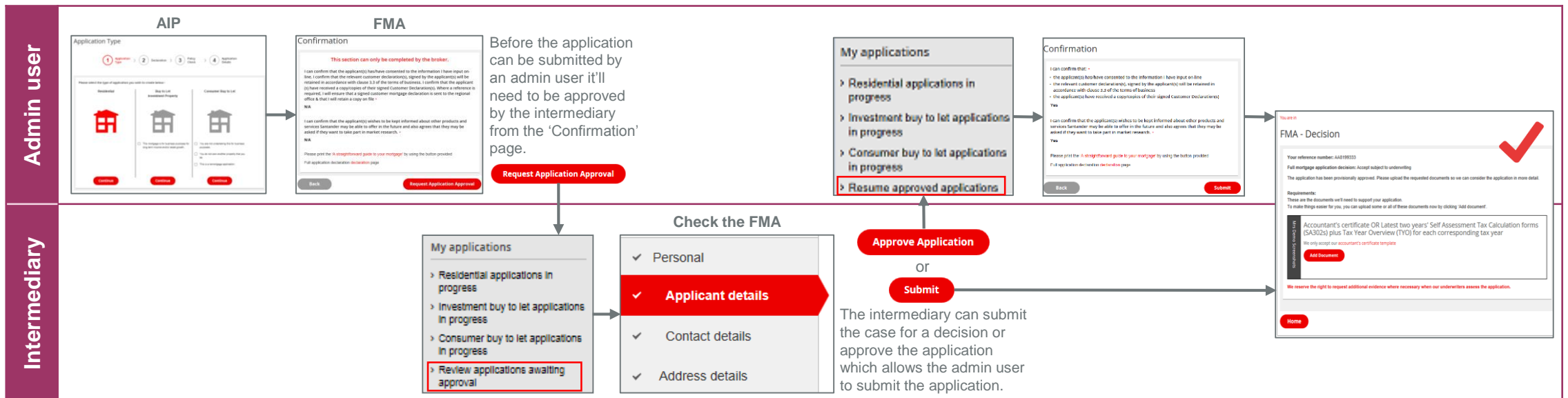
Step 1: log on

- Log on to Introducer Internet and choose the intermediary you'd like to work on behalf of.



Step 2: create a new application

- Admin users can create a new application, submit agreement in principles (AIPs) and complete the full mortgage application (FMA) up to the Identity Verification and Confirmation (IVC) screens. The intermediary will then need to check the application form, complete the IVC screens and either approve the FMA before an admin user can submit, or alternatively the intermediary can submit the application form and upload documents.



Tracking an
application as an
admin user

03

Applications in progress and case tracking

Admin users can track applications in progress, view full case tracking after application submission and access the Mortgage Application Tracking System (MATS). Admin users can also access mortgage offers.

You are in [Application](#) > [My Applications](#) > [Residential Applications in progress](#)

Applications in Progress

Use the list below to select the application that you wish to work with. You can click on the column headers to change the sorting of the list and you can also use the arrows at the bottom of the list to move to the first, previous, next and last page.

Key: Resume Amend View Print Decision Details Cancel

Sort by: Reference Descending

First 1 2 3 4 5 ... Next » Last

Reference	Applicant Name(s)	Days Valid	Stage	Decision	Received	
(P-0-2-F) Mr S User		60	Fma	Provisional Accept	30-Nov-2016	
(P-0-3-F) Mr S User		60	Fma	Accept	30-Nov-2016	
(P-0-2-F) Mr S User		60	Fma	Accept	30-Nov-2016	
(P-0-2-F) Mr S User		59	Fma - Complete	Accept subject to underwriting	29-Nov-2016	

You are in [Application](#) > [Tracking](#) > [Case tracking](#)

Case tracking

Click on the button for our Mortgage Application Tracking System (MATS). Click on the button for further tracking information on the selected case.

Sort by: Received Descending

First 1 2 3 4 5 ... Next » Last

Received	Case Reference	Name	Postcode	Amount	Status	
30-Nov-2016	AF	S User		£100,000.00	Pending	
30-Nov-2016	AA	S User	MKS 6AX	£65,000.00	Pending	
30-Nov-2016	AF	S User		£75,000.00	Pending	
30-Nov-2016	AF	S User		£60,000.00	Pending	

To access MATS simply click on the icon from case tracking.

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Case history | Supply case information | Our service levels

Case history

Useful links

- > Our service levels
- > Literature (forms)
- > Additional property form
- > Substitute property form

Useful downloads

- Evidence requirement guide
- MATS user guide

Case reference:

View the full history of the case and all the messages we've sent.

Messages	Date message sent
> Application received - documents/information requested	30 November 2016 2:23pm
> Passed to underwriting	30 November 2016 2:40pm

Accessing mortgage offers

Admin users can also access mortgage offers.

You are in [Application](#) > [Tracking](#) > [My Offers](#)

My offers

Use the list below to select mortgage offer that you wish download/print or view. The list details all mortgage offers issued in the last 180 days. Click on the to download/print the mortgage offer. Click on the button for further tracking information on the selected case.

Show all offers available
 Show all offers with a case reference starting with
 Show all offers with a customer name containing

Sort by: Case Reference Descending

First

Case Reference	Customer Name	Offer Date	
AF	S User	30-Nov-2016	
AF	S User	30-Nov-2016	

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