

Intermediaries and investment professionals only: not for public distribution

September 2026

Mortgage administrator user guide



Contents

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

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4. Tracking an application as an admin user

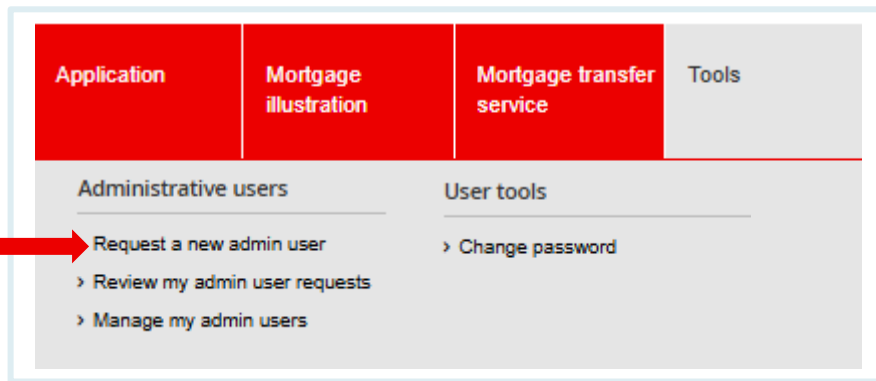


Requesting a new admin user

01

Step 1: new admin user request

- Go to Introducer Internet > Tools > Request a new admin user.



- Complete the online admin user registration form.

A screenshot of the Santander 'Admin user - Personal details' registration form. The form is titled 'Admin user - Personal details' and is part of the 'New admin request' process. It includes a 'Declaration' section on the left and a main form area on the right. The main form area contains the following fields and sections:

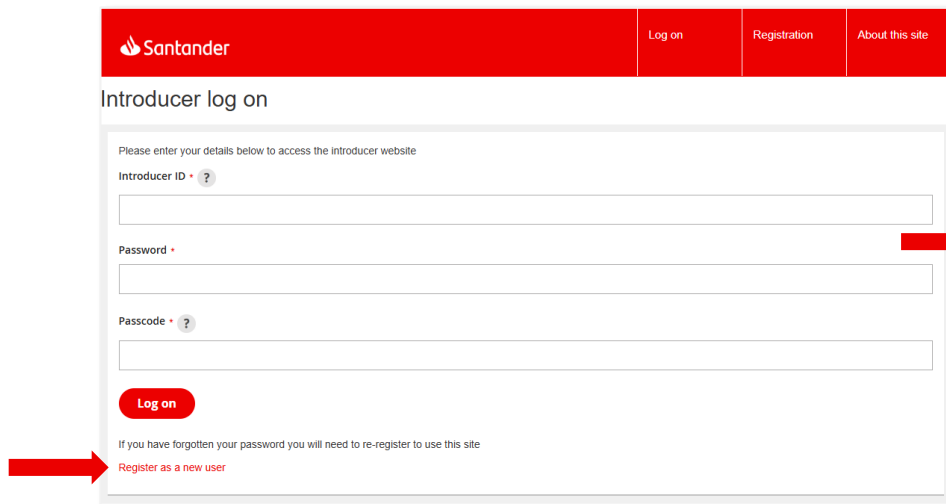
- Title**: A dropdown menu.
- First name**: A text input field.
- Do you have a middle name?**: A section with 'Yes' and 'No' radio buttons.
- Surname**: A text input field.
- Date of birth**: A date input field (DD / MM / YYYY).
- Has a previous name, maiden name or alias ever been used?**: A section with 'Yes' and 'No' radio buttons.
- Nationality**: A dropdown menu.
- Dual nationality**: A section with 'Yes' and 'No' radio buttons.
- Current residential address**: A section with a 'Postcode' input field and a 'Residential address' input field.
- Work telephone number (for the admin user)**: A section with two input fields.
- Work email address (for the admin user)**: A section with an input field.
- Confirmation work email address**: A section with an input field.
- Has the administrator received financial crime prevention, fraud, bribery, corruption and anti-money laundering training?**: A section with 'Yes' and 'No' radio buttons.

A red 'Submit' button is located at the bottom right of the form.

Requesting a new admin user

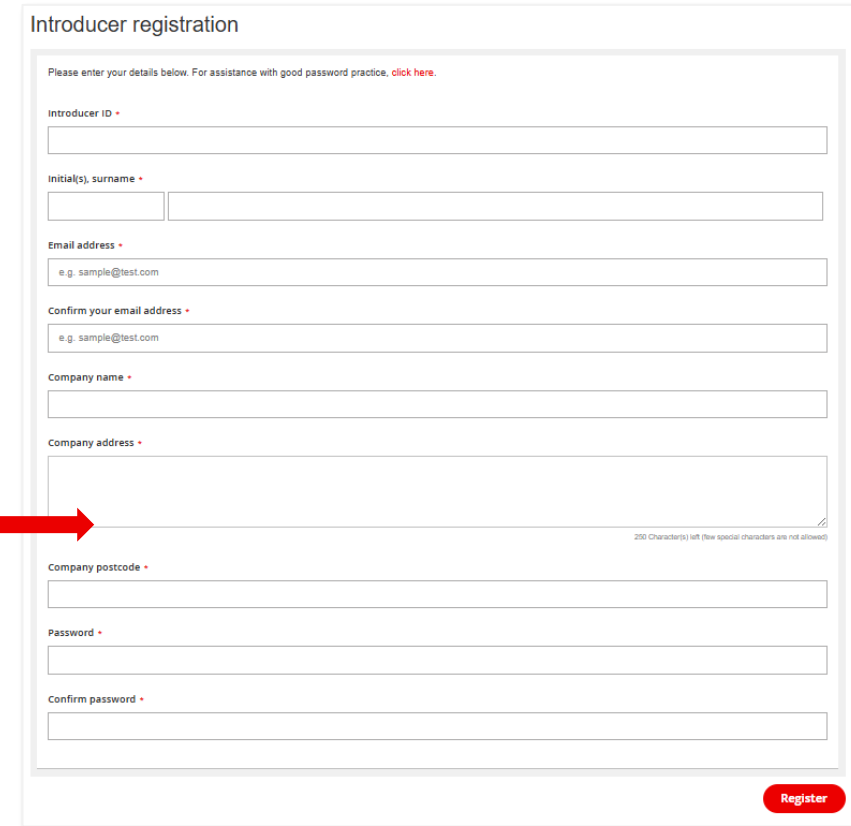
Step 2: registering for Introducer Internet

- We'll set up and email the admin user directly with their unique **Introducer ID**
- They'll then need to go to Introducer Internet by clicking the log on button on santanderforintermediaries.co.uk
- Before the admin user can log in, they need to register to use Introducer Internet – by clicking on the **Register as a new user** link



The 'Introducer log on' form features a red header with the Santander logo and navigation links for 'Log on', 'Registration', and 'About this site'. The main content area has a grey background and contains a 'Please enter your details below to access the introducer website' instruction. It includes input fields for 'Introducer ID' (with a help icon), 'Password', and 'Passcode' (with a help icon). A red 'Log on' button is positioned below these fields. At the bottom, a note states: 'If you have forgotten your password you will need to re-register to use this site', followed by a red link 'Register as a new user'. A red arrow points from this link towards the registration form on the right.

Agree to the terms and conditions and then complete the form.



The 'Introducer registration' form has a light grey header with the title. Below it, a note says: 'Please enter your details below. For assistance with good password practice, [click here](#).' The form contains several input fields: 'Introducer ID', 'Initial(s), surname', 'Email address' (with a placeholder 'e.g. sample@test.com'), 'Confirm your email address' (with a placeholder 'e.g. sample@test.com'), 'Company name', 'Company address' (with a character count '200 Characters left'), 'Company postcode', 'Password', and 'Confirm password'. A red 'Register' button is located at the bottom right. A red arrow points from the 'Log on' form to this registration form.

Use the Introducer ID from our email.

Choose and confirm your own strong password.

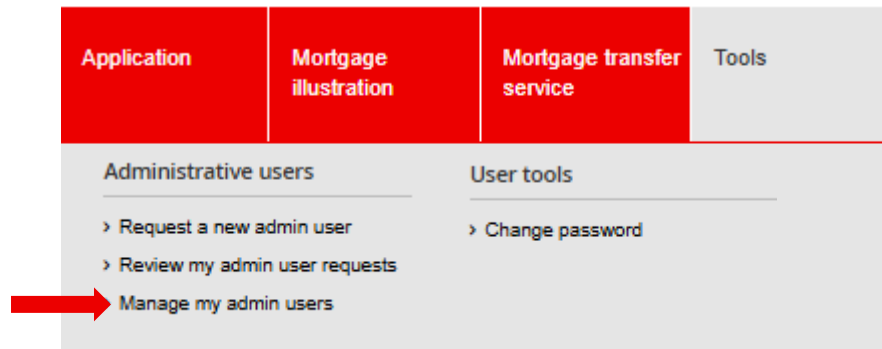
We'll then contact the admin user by email to give them their One-Time Passcode.

Adding an admin user to your account

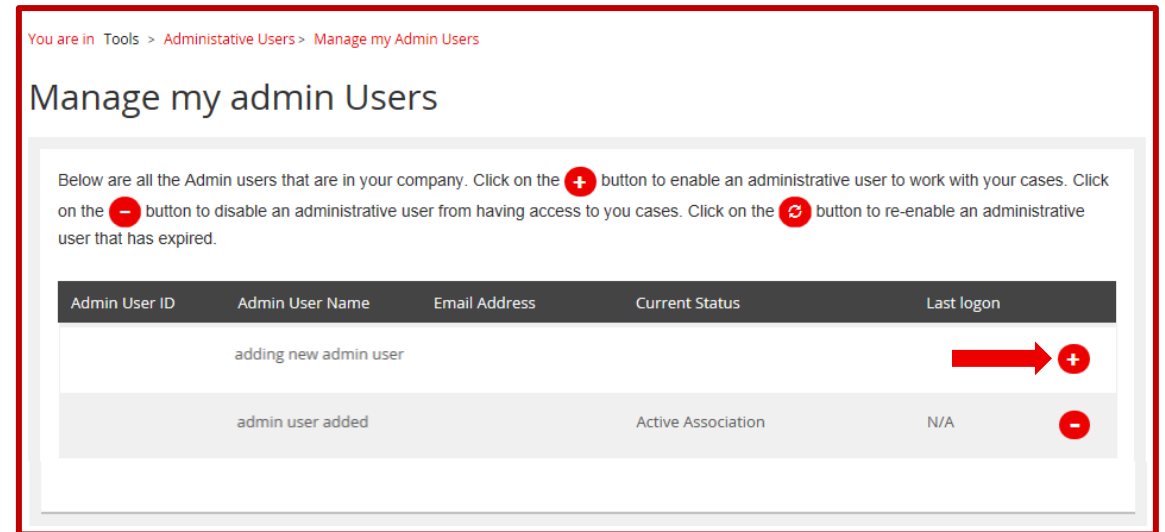
02

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



- Click on the  to add the admin user to their account.
- Admin users must be associated with at least 1 intermediary before they can log on to Introducer Internet.



Using Introducer Internet as an admin user

03

Step 1: logging on & using Introducer Internet

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

Introducer login

Please enter your details below to access the introducer website

Company - Introducer ID - ?

ADM DEMO

Password - ?

Passcode - ?

Log on

If you have forgotten your password you will need to re-register to use this site

Register as a new user

➔

Administrator declaration

- I confirm I have been nominated to access customer data for the purpose of on-line tracking and input of customer information in order to create and progress mortgage applications.
- I confirm the use case 'tracking summary' and 'detailed tracking' and the information contained therein, will be confined to use by me and will not be shared with any other party, other than the nominating introducer or other nominated administrators.
- I confirm that all of the information input will be a true and accurate reflection of the data collected by the Introducer.
- I understand that any misrepresentation of customer information is an offence.

I Decline

I Accept

➔

Select introducer

Please select an introducer from the list below that you wish to administer.

Some of these links may be unavailable if they have not been used in a while. To reenable a link please contact the introducer in question directly

Broker Code	Broker Name	Relationship Status	
	Test intermediary	Last accessed on 13/11/2016	▶
	Test Broker 2	Last accessed on 08/11/2016	▶

Once selected, we'll display a message to check you're sure you want to work on behalf of the broker.

THIS WEBSITE IS FOR USE BY FCA AUTHORISED INTERMEDIARIES ONLY.

Log off

Santander

Log on

Registration

About this site

Select introducer

Please select an introducer from the list

Some of these links may be unavailable

Are you sure?

Are you sure you want to administer introducer INTERMEDIARY DEMO ?

No

Yes

Broker Code	Broker Name	Relationship Status
INTERMEDIARY DEMO	david.trowbridge	New association, not used yet.

A banner will be displayed on the top of every page confirming the name of the broker.

⚠ Administering on behalf of INTERMEDIARY DEMO ⚠

Santander

Application

Mortgage illustration

Tools

Tracking an application as an admin user

04

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-O-2-F) Mr S User	60	Fma	Provisional Accept	30-Nov-2016		
(P-O-3-F) Mr S User	60	Fma	Accept	30-Nov-2016		
(P-O-2-F) Mr S User	60	Fma	Accept	30-Nov-2016		
(P-O-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.

Santander Case history Supply case information Our service levels

Case history

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



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