

Intermediaries and investment professionals only: not for public distribution

June 2026

# Mortgage administrator user guide



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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.

1. Requesting a new admin user
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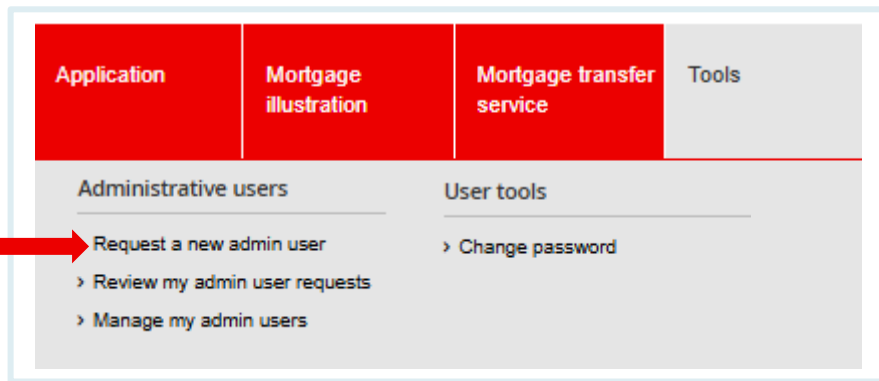
# Requesting a new admin user

01

Requesting a new admin user

# 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 the following fields and options:

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

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

## Step 2: admin user security details



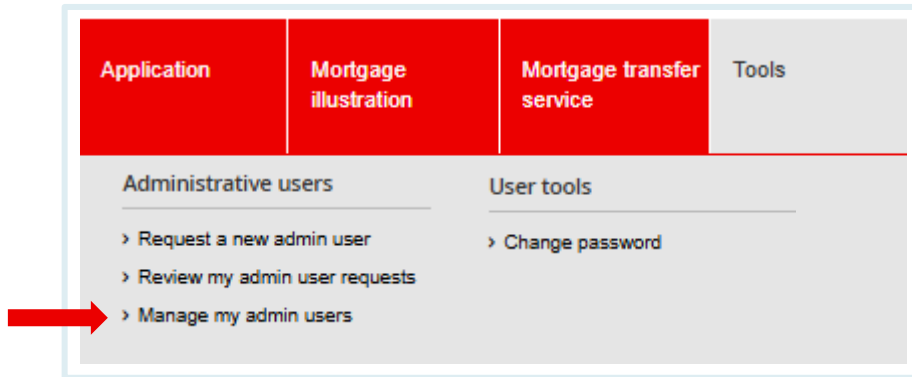
We set up and email the admin user directly with their Introducer ID and password.



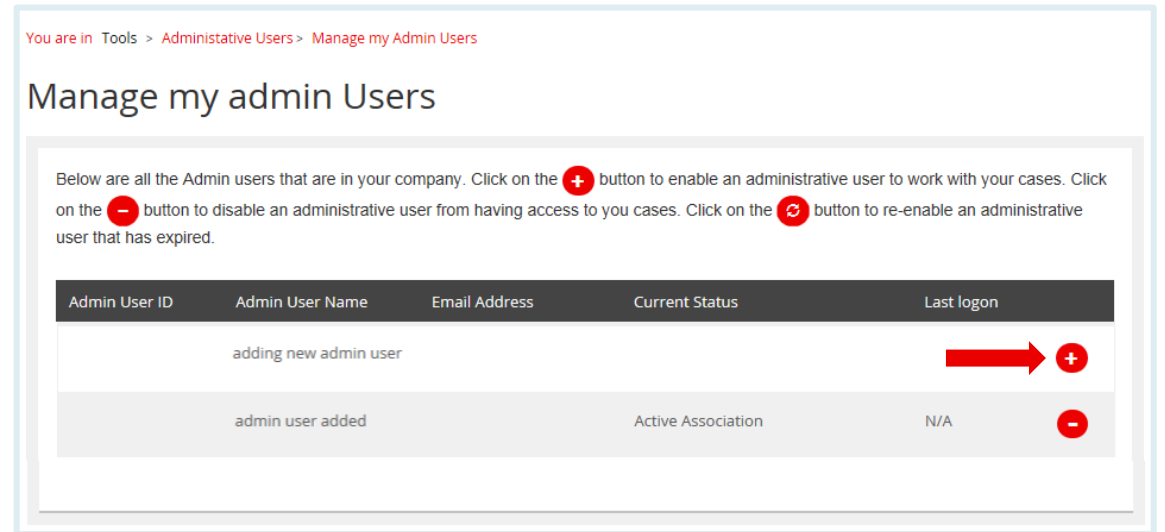
We contact the admin user by phone to give them their one-time passcode.

# 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



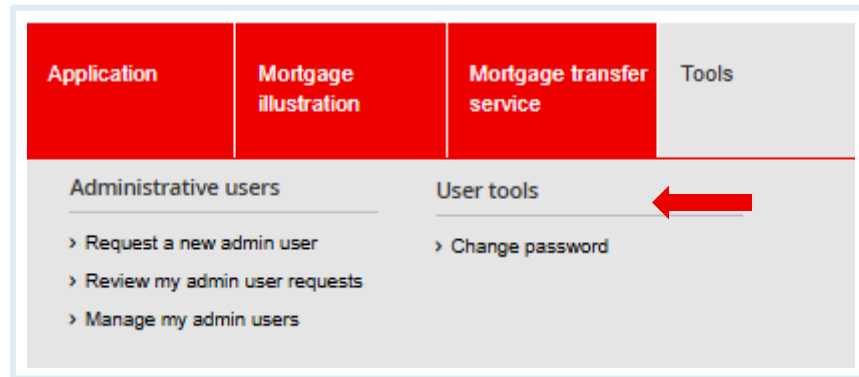
- Click on the **+** to add the admin user to their account.
- Admin users must be associated with at least 1 intermediary before they can log on to Introducer Internet.



## Requesting a new admin user

# Step 4: admin user first time log on

- 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 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.



A screenshot of the 'Change password and passcode' form. The form is titled 'Change password and passcode' and includes a breadcrumb trail: 'You are in: Tools > User Tools > Change password'. The form contains several input fields: 'Current password', 'Current passcode', 'New password', 'New passcode', 'Confirm new password', and 'Confirm new passcode'. A red 'Submit' button is located at the bottom of the form. A note at the top of the form reads: 'To change your password and passcode enter your details below. You will need to change both. For assistance with good password practice, [click here](#).'

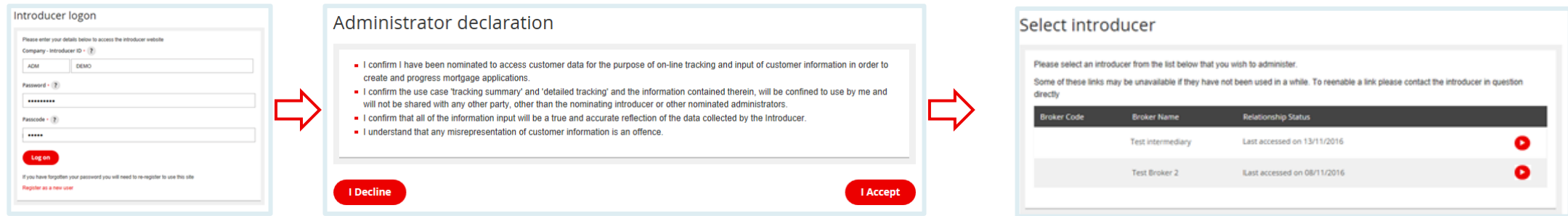
Submitting an  
application as  
an admin user

02

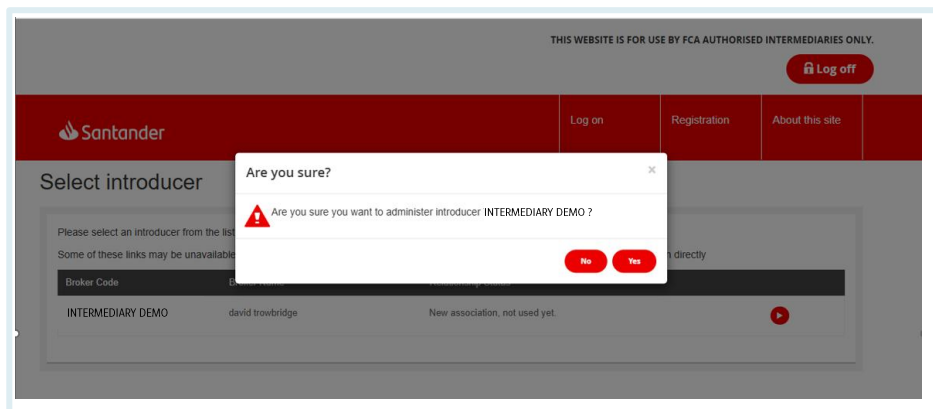
## Submitting an application as an admin user

# Step 1: logging on & using Introducer Internet

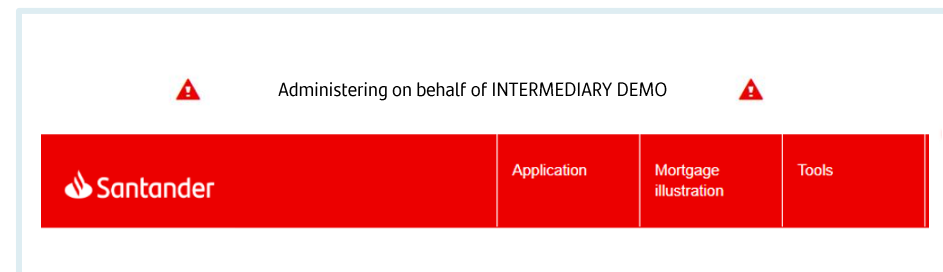
Log on to Introducer Internet and choose the intermediary you'd like to work on behalf of.



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



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



# 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	MK5 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

**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 2:22pm
> 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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