

Intermediary Mortgage Portal Help Guide



How to register, request a decision in principle or illustration, and apply for a mortgage through our online portal.

Contact Us

Intermediary Sales Support: 01623 676360

Application updates: 01623 676340

Lines open:

Mon to Fri: 9.00am* - 5.00pm

**Weds from 10.00am due to training*

Call Back Request available from our website at mansfieldbs.co.uk/intermediaries

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1. How Do I Log-in?


1.1 Existing Introducer Re-registration

If you are an existing introducer who used our previous mortgage system, you will need to re-register to use the new mortgage portal to create an account. See 'Online Registration' section below. If you have any issues, please first contact Intermediary Sales Support on 01623 676360.

Once your account has been created, you will be logged into the system straight away.

1.2 Check your browser settings

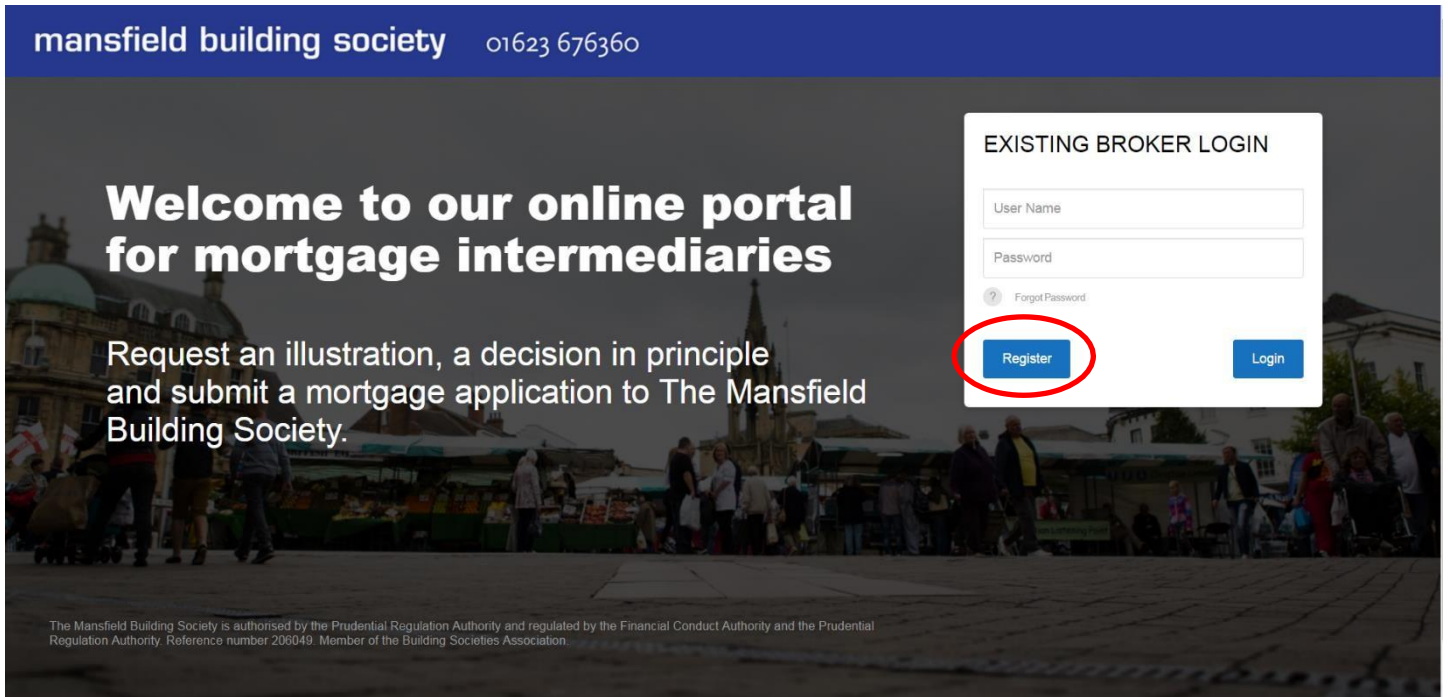
Please note in order to access the system you will require Internet Explorer (IE) 11 or above, or Google Chrome otherwise the system may not work properly.

To check what browser version of Internet Explorer you are currently using, click on the settings button in  the browser and select 'About Internet Explorer'.

This will confirm which version of IE you have. If you need to upgrade this, simply search through your preferred search engine 'Internet Explorer 11' and you should be able to download it. Alternatively contact your company or network's IT Helpdesk.

1.3 Online Registration

To access the Mansfield Intermediaries online portal visit <https://portal.mansfieldbs.co.uk/Account/Login> and simply select 'Register'.



When the next box appears, select 'New Registration' if you are the first advisers from your firm to register. If you are aware that colleagues at your firm have already registered then select 'Advisor to existing Registration'. If you are not sure please contact our Intermediary Sales Support team on 01623 676360 or email brokers@mansfieldbs.co.uk.

Registration Type

Please select the type of Registration you wish to complete. If you are not sure which is the most appropriate selection click the ? next to the selection for more information.

Registration Type	Select
? New Registration	<input checked="" type="radio"/>
? Advisor to existing Registration	<input type="radio"/>

[Already Registered ?](#) [Next](#)

Complete all the fields under 'Your Details' and Select 'Next'.

Your Details

Email Address

Select Title

Your Name

Select Job Title

Password

Confirm Password

Your email address will be your username once you are registered

Complete all the fields under 'Organisation Details' and select 'Next'.

Organisation Details

FCA Number

Organisation Name

Post Code

Property Name

Property Number

Road

District

Town

County

Phone Number

Select Network

Select Mortgage

If you notice the network you are part of is not on the list, please advise Intermediary Sales Support on brokers@mansfieldbs.co.uk or telephone us on 01623 676360

Next, you will be asked to confirm your details. Once you are happy the information entered is correct, select 'Create Account'.

Once your account has been created you will be logged into the system straight away and will immediately be able to submit Enquiries (DIPs and Illustration requests) and Applications. The Society will manually assess and process your application as we do not use credit scoring..

After registering, to log in and out all you need to do is enter your user name (your email address) and password on the homepage <https://portal.mansfieldbs.co.uk/Account/Login>.

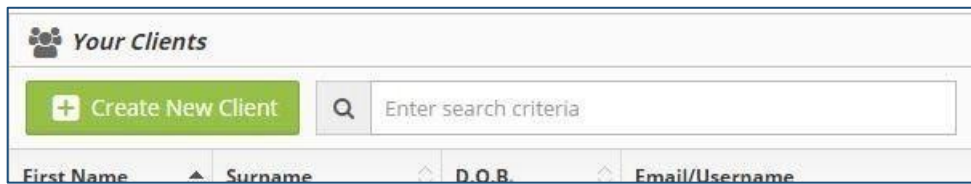
2. How Do I Create a Client?

Before you can submit an Enquiry (DIP or Illustration Request) or an Application, you will need to create a Client

- this should be the person to be named first on the application.

Once logged in, the first page you will see, is the 'Your Clients' page. Here is where you will find a list of your current & previous clients. From this page, in the top left hand corner select 'Create New Client'.

Please Note: Irrespective of whether you are creating a single or joint application, create only the first (main) applicant at this point. You will get the chance to add a second applicant later in the process as long as you have selected 'Create A New Joint Application'



You will be directed to the 'Client Details' page. Enter the information requested and select 'Save Client Details' which is highlighted in green.

N.B. Make sure you save your clients details prior to adding notes or uploading supporting documentation.

Once you have saved your client details a message should display in the top right hand corner of the page informing you the details were saved successfully.

3. How Do I Upload Supporting Documents/Information?

3.1 Supporting Documents

Once you have saved your client details, if you have any documents to upload to support the application you will be able to do this now.

NB. You will also have the opportunity to upload supporting documents at the end of the full application submission process.

You can upload PDF, PNG or JPEG files up to 4MB in size.

Notes

Note	Created By	Created On

[+ Add Note](#)

Client Documents

Document	Type		
any file	Miscellaneous	Edit	Delete

[Browse...](#)

Please upload files of type jpeg, png or pdf only. (Up to 4MB per document)

File Description -- Select -- [Upload](#)

Select the 'Browse' button and find the document you would like to upload from those that you have saved for your client.

In the 'File Description' field give the document a name. From the drop down menu select the document type which best fits the document you are uploading and select 'Upload'. A pop up message will display in the top right hand corner of the page confirming the upload was successful.

A checklist of minimum supporting documents can be found under the 'Product Guides and Downloads' section of our intermediary website.

3.2 Notes

Once your client details have been saved, you can also upload any notes which may support your application. Simply complete the text box and select 'Add Note'.

Notes

Note	Created By	Created On

[+ Add Note](#)

4. How Do I Submit a Decision in Principle?

To submit a DIP, you will need to select 'Create A New Single Application' or 'Create A New Joint Application' once the client(s) have been created. Alternatively, you can select an existing client from the 'Your Clients' page.



Next, select which submission route is to be used, choosing either Direct Application or the appropriate club applicable.

NB. Some products are available only to certain mortgage clubs. Take care when completing this section as it may determine the products which can be selected when completing an enquiry or application form. If the club you wish to select does not appear, please contact Intermediary Sales Support on 01623 676360 or email brokers@mansfieldbs.co.uk.

Tell us more about your application ✕

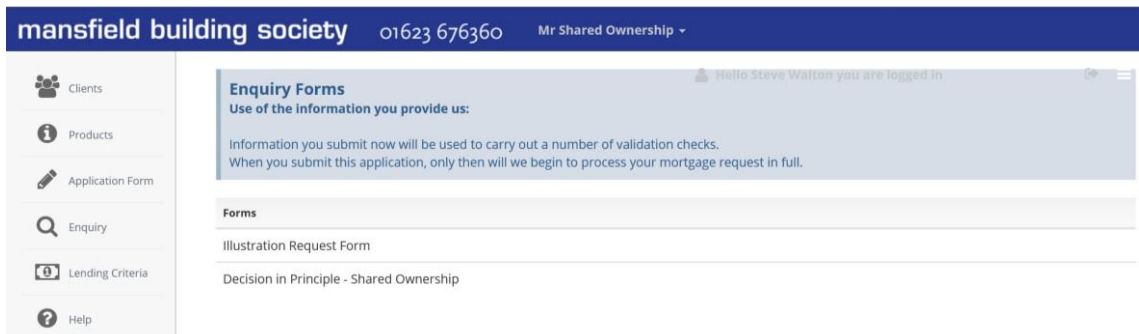
Please tell us which submission route you wish to use for this application.

Direct Application ▾

Save



Under 'Forms', select the appropriate Decision in Principle form e.g. 'Decision In Principle – Shared Ownership'.



Complete the form in full. Some information will populate across from the client record. Each section of the form will highlight red, yellow or green on the Summary Bar at the top of each page. If a section is highlighted red this means there are mandatory questions which are incomplete, yellow indicates that there are unanswered non- mandatory questions and green where all questions in that section are complete. The final page will provide a summary of information entered.

By having the DIP request as part of the overall mortgage application, you will benefit from the data being automatically transferred through to the full mortgage application if/when the DIP has been approved.

When you complete a DIP, the information will be referred to us and the icon will appear as an amber colour showing the referred status which in turn indicates that your request has been submitted.



Once the DIP has been assessed we will accept or decline the request on the system and contact you offline to advise you of the results. If the DIP has been accepted the icon will turn green indicating that the application can proceed.

Please note that for second and subsequent DIP requests for the same client, the 'Enquiry' icon in the main page cannot be used and the side menu 'Enquiry' icon must be used instead.

Should you require to print the DIP request form, select the print icon at the top right of the screen which will convert the form into a printer friendly pdf document. The pdf document produced can also be saved if required.

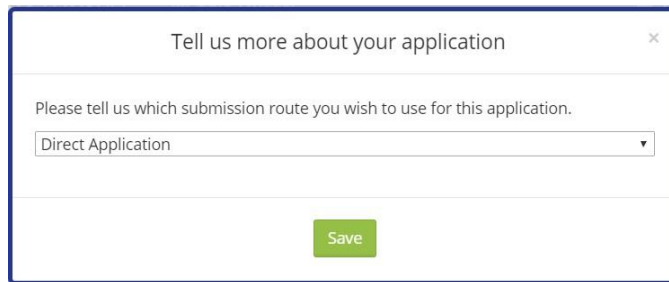
5. How Do I Create and Submit an ESIS Request Form?

To request an ESIS, you will need to select 'Create A New Single Application' or 'Create A New Joint Application' once the client has been created. Alternatively, you can select an existing client from the Client page.



Next, select which submission route is to be used, choosing either Direct Application or the appropriate club for this application.

NB. Some products are available only to certain mortgage clubs. Take care when completing this section as it will determine the products which can be selected when completing an enquiry or application form. If the club you wish to select does not appear, please contact Intermediary Sales Support on 01623 676360 or email brokers@mansfieldbs.co.uk.

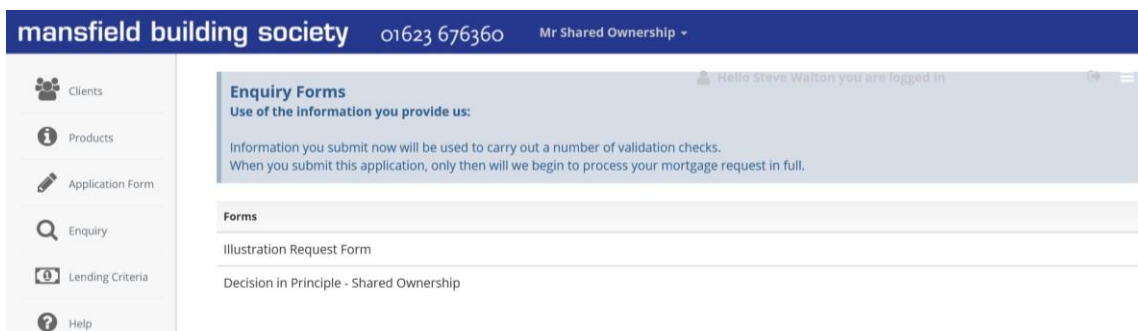


As you progress through to Application Commencement, you will be given the opportunity to make an 'Application' or an 'Enquiry'. To request an Illustration, click 'Enquiry'.

NB. You do not need to request an ESIS prior to making an application.



Under 'Forms', select 'Illustration Request Form'.



Complete the form in full. Some information will populate across from the client record. Each section of the form will highlight red, yellow or green on the Summary Bar at the top of each page. If a section is highlighted red this means there are mandatory questions which are incomplete, yellow indicates that there are unanswered non- mandatory questions and green where all questions in that section are complete.

By having the ESIS request as part of the overall mortgage application, you will benefit from the data being automatically transferred through to the full mortgage application.

When you complete an ESIS Request Form, the information will be referred to us and the icon will appear as an amber colour showing the referred status which in turn indicates that your request has been submitted.



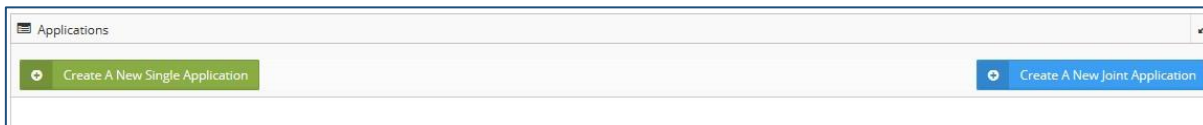
Once we have completed the ESIS, we will send it to you as an encrypted PDF via email.

Please note that for second and subsequent ESIS requests for the same client, the 'Enquiry' icon in the main page cannot be used and the side menu 'Enquiry' icon must be used instead.

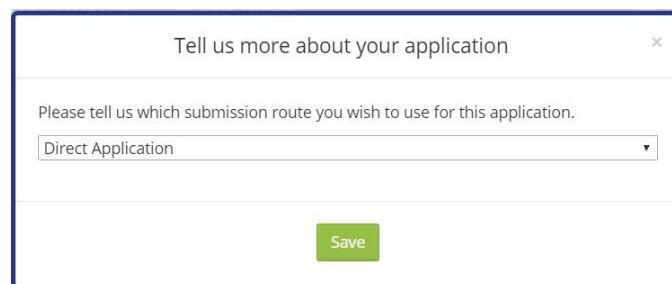
Should you require to print the ESIS Request Form, select the print icon at the top right of the screen which will convert the form into a printer friendly pdf document. The pdf document produced can also be saved if required.

6. How Do I Create an Application?

Once you have saved the clients details and uploaded any notes/supporting documents you will see the application option at the top of the screen. Here you can select to either create a 'New Single Application' or a 'New Joint Application'.



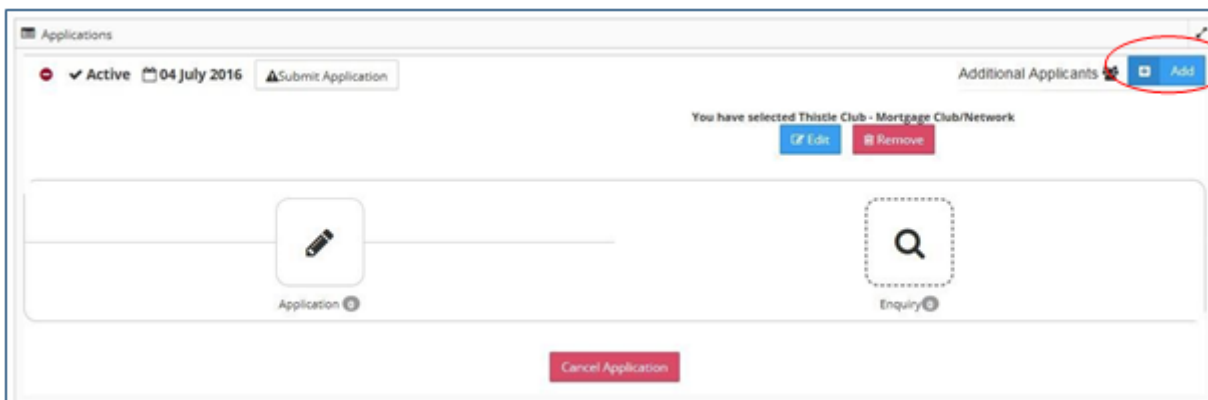
Once you have made your selection, you will be directed to select the appropriate mortgage club. Here you may select a different option from the mortgage club you registered with in order, for example, to obtain access to a particular club exclusive product.



The dialog box is titled 'Tell us more about your application' and contains the text: 'Please tell us which submission route you wish to use for this application.' Below this is a dropdown menu with 'Direct Application' selected. At the bottom center is a green 'Save' button.

Click 'Save'

You will then be directed to either process the application form **or if the application is joint, you can add another applicant at this stage** by selected 'Add' in the top right hand corner.



If you need to add a second applicant, you are taken to a list of your current clients.

If you have already created the second applicant as a client you will be able to select them from your list or you can select 'Create New Client' where you can add information and (if applicable) copy address information from applicant one.

Applications

Active 04 July 2016 Submit Application Additional Applicants Add

Your Applicants

Create New Client Enter search criteria 10

First Name	Surname	D.O.B.	Email/Username	Road	Town	Postcode	Phone	Select
Anne	Mackay	01/01/1998	AnnieMack@Mackx.co.uk	Brown Tree Road	Edinburgh	EH23 8FH	01315286974	<input checked="" type="checkbox"/>
Cameron	Hynd	25/10/1989	Cammy@hotmail.com	Keir Hardie Terrace	Dunfermline	KY11 3BP	01383 721863	<input type="checkbox"/>
David	Mackay	02/02/1997	davie@test.co.uk	Brown Tree Road	Edinburgh	EH23 8FH	01258 654785	<input type="checkbox"/>
Duncan	Tweedie	12/06/1990	Dunx@hotmail.com	Dalcross Way	Dunfermline	KY11 6KJ	01383 652147	<input type="checkbox"/>
Eilidh	Brown	12/12/1989	marley@btopenworld.com	Guidice Road	Edinburgh	EH11 4RE	01322 658 964	<input type="checkbox"/>
Graham	Davidson	12/08/1989	gdavidson	Hudson Road	Rosyth	KY11 2EW	01383 625987	<input type="checkbox"/>
Grant	Hynd	03/02/1995	granth@aol.com	Dundee Street	Dundee	DD2 8DR	012588 854112	<input type="checkbox"/>
Holly	Hynd	12/12/1987	hollytest@testtest.com	Snow Street	Dunfermline	KY11 3PD	0131 313 7737	<input type="checkbox"/>
Homer	Simpson	01/01/1960	doh111@gmail.com	Springfield Road	Edinburgh	EH11 2EF	0131 313 7728	<input type="checkbox"/>
Jackie	Simpson	01/01/1990	Jsimpson@hotmail.com	Robertson Road	Dunfermline	KY23 J89	0131 562 3698	<input type="checkbox"/>

Showing 1 to 10 of 21 entries

First Previous 1 2 3 Next Last

Hide Add Selected Applicant

Once you have all applicants' details linked, you should then select 'Application'.



You will then be asked which type of application form you require.

Application Forms

Please select the appropriate Application Form

Forms

- Application Form
- Guarantor Application Form
- Self Build Application Form

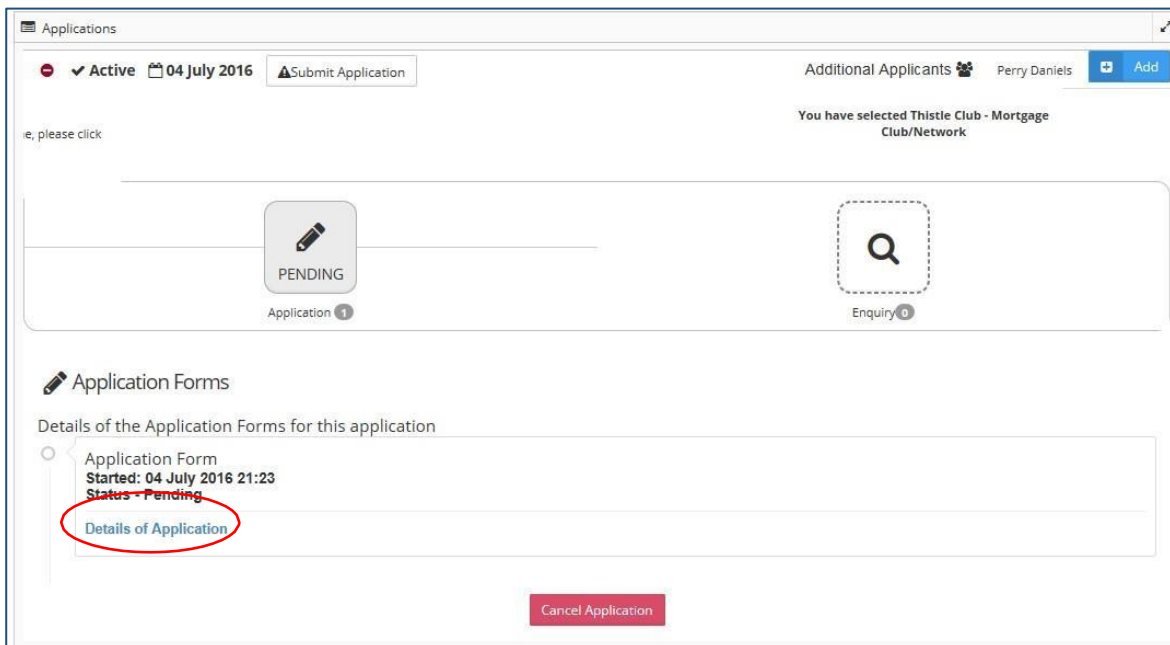
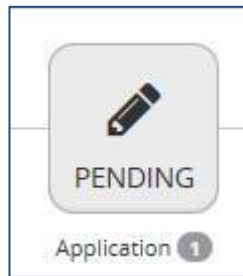
Select the most appropriate form to begin keying the application.

Complete the form in full. Some information will populate across from the client record and any Enquiry forms you have completed. Each section of the form will highlight progress as red, yellow or green on the Summary Bar at the top of each page. If a section is highlighted red this means there are mandatory questions which are incomplete, yellow indicates that there are unanswered non-mandatory questions and green where all questions in that section are complete.

7. How to Access a Partially Keyed Application

You will be glad to know that even if you need to dip in and out the system you will find the application details will be saved as you last left it.

To access a case you are part way through keying, simply log in and select the appropriate client, you will then see that the application is now 'Pending', click on:



By selecting 'Details of Application' you will be able to carry on inputting details to the application form. You will also see that you can 'Cancel Application' from this area if you or your client decided not to proceed.

8. How to Submit an Application

8.1 Application Submission

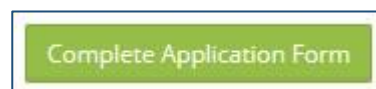
Once you have completed the appropriate Application Form for your client(s) select 'Next' at the bottom right hand corner. You will then be taken to a 'Summary Page'.

Each section of the form will highlight red, yellow or green on the Summary Page. If a section is highlighted red this means there are mandatory questions which are incomplete.

If a section is highlighted yellow this means that not all the questions have been answered but all mandatory questions have been answered and you can submit the application.

Sections highlighted green means all questions have been answered and you can submit the application.

If you have completed all mandatory fields (for both applicants), you can then select:



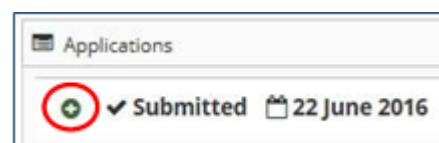
8.2 Supporting Documents

You will then be directed to the final submission page (which is not required if you uploaded all the supporting documents at the beginning). Here it reminds you that you must fully package the case and certify all the documents before submitting.

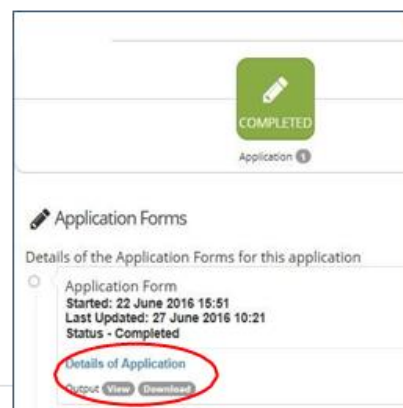
A checklist of minimum supporting documents can be found under the 'Product Guides and Downloads' section of our intermediary website. Only fully packaged cases can be progressed.

8.3 Printing the application form

Please note that we will require the original signed application form to be posted to the Society. To print/save an application that you have submitted, simply access and at the top of the page you will see the applications menu as shown below:



Click on the green plus sign as circled, which opens the application information and click Download.



9. Frequently Asked Questions

Q. Can I submit an application form where I don't have all the supporting documents?

A. All applications must be fully packaged before it can be considered by our underwriting team. The system will not allow applications to be submitted without some supporting documentation being uploaded.

Q. What should I do if I am having trouble completing or submitting the application?

A. Contact Intermediary Sales Support on 01623 676360 or email brokers@mansfieldbs.co.uk

Q. What should I do if I've forgotten my password?

A. Simply click on 'forgot password' on the login screen and you will receive an email with a link to reset your password.

Q. Who should I contact to receive updates on my Application?

A. Call our Mortgage Department on 01623 676340 or email mortgages@mansfieldbs.co.uk

Q. Who should I contact to check the status on my Decision in Principle (DIP)?

A. DIPs are manually underwritten and our service standard is 48 hours. If you have heard nothing after 48 hours, please contact Intermediary Sales Support on 01623 676360 or email brokers@mansfieldbs.co.uk

Q. What if I am part way through keying the application and I am logged out unexpectedly, will all my work be lost and will I have to start keying the application again?

A. No, once your client is set up and you are keying an application, you can log in and out freely and all your work will be saved.

Q. When completing the application, I see there is a mandatory field that doesn't apply to my client, what should I do?

A. Mandatory fields are put in place to ensure that we are getting as much information as possible, although we appreciate that your client's details/circumstances may be different. In these instances, please input the most accurate information (e.g. 'n/a' or '0.00'), alternatively contact Intermediary Sales Support on 01623 676360 or email brokers@mansfieldbs.co.uk

Q. What should I do if I need a Decision in Principle (DIP) to check affordability for my client?

A. First of all, check affordability using our affordability calculator on our intermediary website. If an affordability 'pass' is obtained, then you can proceed to log onto the Broker Portal and submit a DIP electronically. If an affordability 'refer' is returned, then please contact Intermediary Sales Support on 01623 676360 who can advise whether the 'refer' decision is acceptable.

Please note that this is a DIP submission tool only and that DIPs are underwritten manually with a service standard of 2 working days. Please note that the DIP process includes a credit search of your client(s) using Call Credit, and leaves only a soft footprint.