

Residential Mortgages Broker Portal

Navigation tips (Issue 1 – March 2016)

How to use our Broker Portal

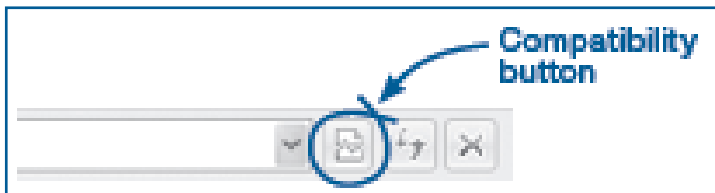
These simple navigation tips will help you submit Residential Mortgages and Standard buy-to-let applications through our broker portal.

If you have any further questions, **please call our team on 0333 321 1000.**

Technical requirements

To access the broker portal you must have Internet Explorer Version 7 or above.


Users of Internet Explorer Version 8 will need to ensure that the site is displayed in 'Compatibility View'. To do this, click on the compatibility button between the web address and the 'Refresh' button at the top of your screen.



Registering to the Broker Portal

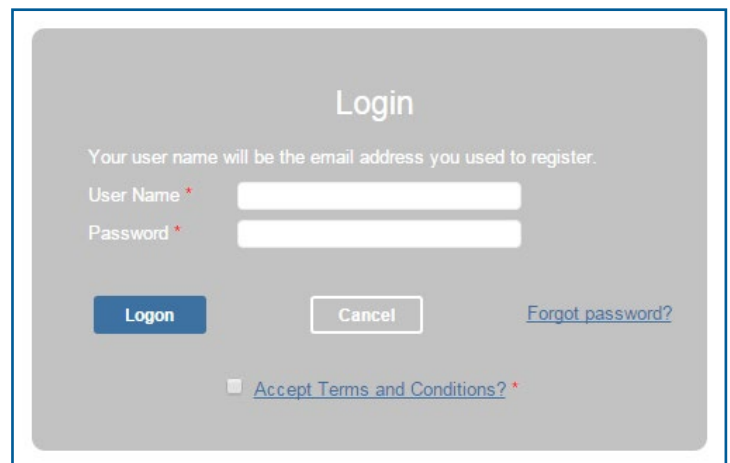
Register to submit applications to the Aldermore Residential team. All you need is your FCA number. [Click here to register.](#)


We will automatically send you an email to verify your email address. Simply click on the link in the email to start using the portal immediately.

 **TIP:** When you first register, please take a moment to add submission routes for use on your applications. Follow the directions in **User Profile** overleaf to do this. You can add or remove further routes at any time.

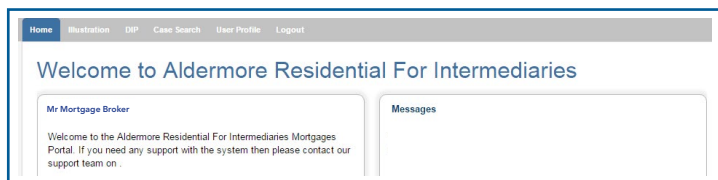
Logging in

Please [click here](#) and enter your user name and password.

A screenshot of the login page. The page has a light gray background. At the top center, the word 'Login' is displayed in a dark font. Below it, a line of text reads 'Your user name will be the email address you used to register.' There are two input fields: 'User Name *' and 'Password *', both with red asterisks. Below the input fields are three buttons: a blue 'Logon' button, a white 'Cancel' button, and a blue 'Forgot password?' link. At the bottom, there is a checkbox labeled 'Accept Terms and Conditions? *' with a blue link to the terms and conditions.

 **TIP:** Remember to review and click to accept our terms and conditions.

Using the Home Screen



The home screen of your portal contains the following features:

- **Illustration** – to generate a KFI+.
- **DIP** – to start a new Decision in Principle (DIP), which once accepted you can convert to Full Mortgage Application (FMA).
- **Case Search** – to find DIPs, FMAs and Illustrations you have previously generated.
- **User Profile** – where you can update your password, contact details, address and submission routes.
- **Calculators** – you can calculate your client’s residential or buy to let affordability before submitting a DIP here.
- **Logout**.

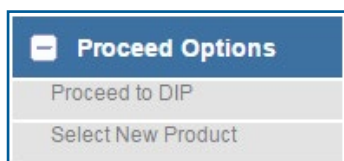
TIP: You can navigate between screens by using the menu at the top of the home screen. NOTE: information input may not be saved when you leave each screen.

TIP: Once in the DIP facility, use the clickable side menu to view previous pages.

Generating an Illustration

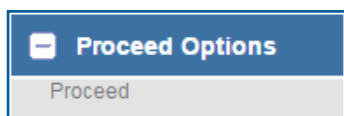
Use this section to produce a KFI+. Once started the KFI+ must be keyed in full. If you exit part way through this process the information input will not be saved.

Once you have your KFI+, you can click **Proceed** to continue to DIP, or **Select New Product** to create an additional KFI+ on another product.



New DIP/Application

- To submit a DIP or FMA use this section on your Home screen.
- Once the status of your DIP is “DIP Illustration Produced” you can click **Proceed** to continue to FMA.
- When FMA is completed, customer documents and required documents will be generated. These can be viewed at any time on the **Case Summary**.



TIP: Self-Employed applicants (those with more than 25% share ownership) should be entered as a Director, using salary and dividends as earned income.

TIP: When collating customers commitments, please gather credit card and store card “valid to” or “expires end” dates and enter in the **“End Date”** box.

TIP: When selecting a remortgage product, please ensure the version with “Free Legals” is selected when appropriate.

TIP: Buy-to-let Portfolio details – please enter three from your client’s portfolio. For larger portfolios, please upload the full portfolio in the checklist items – see **Case Summary** (overleaf) for further details.

Case Search

Search for previously submitted illustrations, DIPs and FMA, using Case ID, status, surname or security property postcode.

Case Summary

See the progress of your client's FMA in the Case Summary section. Click on the reference number on the home screen or from within **Case Search** to take you here.

From here you can see:

The screenshot shows the Case Summary for Case A100000844, BTL, Remortgage. It includes a left-hand navigation menu with sections like Application Status, Progress, Checklist Items, Documents, and Notes. The main content area is divided into several sections: Overview and summary, Progress status, Checklist items, Documents, and Notes. Callouts A-E point to these sections: A (Overview and summary), B (Progress status), C (Checklist items), D (Documents), and E (Notes).

A Overview and summary of your application.

B Progress status of your application.

C Checklist items – you can see what is required to fully underwrite your application. This is the quickest way to upload requirements against the relevant checklist item.

D Documents – view and download documents for your client's application.

TIP: To upload a generic document that you feel is relevant, please use "Upload Document" in the Documents section.

E Notes – add a note direct to the underwriters regarding your case to reply to a checklist item, or update us on progress and new information that is important for our underwriters to consider. This is the quickest way to communicate directly with our underwriters.

TIP: To expand the above sections, click the icon for full screen and to return to the case summary.

Calculators

Use our **Residential** and **Buy-to-let calculators** to work out affordability by inputting income and commitment details.

TIP: Our default calculator is Residential. To use the Buy-to-let Calculator click the relevant link on the left hand side of the screen.

TIP: This is for our standard buy-to-let range only.

Your Broker Portal User Profile

From the home screen, please select **User Profile** to access the following features:

- **Change your existing password.**
- **Change your address.**
- **Change your contact details.**
- **Add or remove submission routes** – when submitting an application, you will be asked if you are submitting via a Mortgage Club or Distributor. To add or remove a submission route, highlight the selected club and use the arrows to transfer them to the relevant list.
- To make any changes you will be asked to input your current password to save the changes.

The screenshot shows the 'Change submission routes' dialog box. It has two main sections: 'Select Mortgage Club' and 'Preferred list'. The 'Select Mortgage Club' section contains a list of four mortgage clubs (Mortgage Club 1 to 4). The 'Preferred list' section contains a list with 'Mortgage Club 1'. There are right and left arrow buttons between the two lists. Below the lists is a 'Confirm password to perform change*' field and 'Cancel' and 'OK' buttons.

We hope you found these tips helpful, and we covered everything you need to know to make the most of our broker portal.

If you have any further queries don't hesitate to get in touch.

0333 321 1000

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