Intermediaries Online User Guide



Support for intermediaries



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Logging In

1.1 Online Registration

In order to register please visit **www.leekbs.co.uk/intermediaries/intermediaries-online/** Once you have read the terms and conditions please select proceed to Intermediaries Online. Then select Register:

♦ LEEK Building Society	
	EXISTING BROKER LOGIN
Welcome to	User Name / Email Address
Intermediaries Online	Password Forget Password
	Register
	nssessment

1.1 Online Registration (Continued)



Complete your details and then select Next
Your Details
Email Address
Select Title
Full Name
Select Job Title
Please select a Job Title

PLEASE NOTE your email address will be your username once registered. Please insert your full name under 'Your Name'.

Your password must be 8 characters or longer and have at least one upper case, lower case and a number, as well as a special character (e.g. 1£\$%^&"+#)

Enter all relevant fields under 'Organisation Details' and select Next.

You will then be asked to confirm your details. If the information is correct then select Create Account.

Once the account has been created you will be sent an automated activation email. **Please look out for this, as this link will expire.**

FCA Number	
Organisation Name	
Trading As Name	←
Post Code	Lookup
Property Name	
Property Number	
Road	
District	
Town	
county	
Phone Number	
Vetwork	*
fortgage Clubs	

Confirm Password

Previous

Organisation name

should be the name that corresponds with your FCA number.

Next

Insert trading name if your company name is different to the one your FCA number is registered to.

If the network you are part of is not listed then please telephone us on **0808 281 9309**.

Creating a Client



Once logged in, the first page you will see is 'Your Clients'.

If you have previously used the Intermediaries Online and this application is for an existing client, please select the client by clicking on their surname.

LEEK		🛔 Hello George Simpson you are logged in	• =	
det.	볼 Your Clients			1
Clients	Create New Client Q Enter search criteria			10 0
Products	Forenames A Surname 🗘 D.O.B. 🗘 Email/Username	O Phone O Loan Amount	Product Code Other Applicants	🗘 Status 🔿
£ Lending Criteria		No data available in table		
O Help	Showing 0 to 0 of 0 entries		First Prev	vious Next Last

In order to create a new client select Create New Client. Please note that at this stage you only need to create the first applicant, where there are further applicants you will be given the opportunity to add them later.

	📽 Your Clients									
1	🖶 Create New	Clier	nt	٩	Enter search criteri	a				
	Forenames		Surnam	10) D.O.B.		Email/Username	Phone	Loan Amount	Product Cod

♦ LEEK Cierts A Products £ Lending Criteria Title - Select - 🗸 Notes O Help Forenames Forenames 0 Date of Birth (Day Postcode Postcode rty Name Property Property Number Client Documents Road Road Choose File No file ch District - 54 County Email Email Address Number Home Number Mobile Number Mobile Number

Enter all the relevant details and then select Save Client Details.

A message will be displayed in the top right hand corner to confirm the client has been saved successfully.

2.1 Notes and Updates

Notes are for your own use so please <u>do not use</u> to send messages to our underwriters, these can be added to the application form under additional details or emailed post submission to mortgage.processing@leekbs.co.uk

Creating an Application

3

Once the customer record has been saved for the first named applicant, you can then create the application. In order to do this you will need to enter the customer record where you can select either 'Single Application' or 'Joint Application' in the Applications section.

Applications		2
Create A New Single Application	> O Create	A New Joint Application

You will be asked to select a submission route for the application. This will be either a Direct Application or the Mortgage Club/Network that you are affiliated to.

♦ LEEK Maing Solery	
Tell us more about your application Please tell us which submission route you wish to use for this app	lication.
Direct Application	*
Close Save	

If this is a joint application you will then be able to add subsequent applicants by selecting an existing client or create a new client. Existing clients will be displayed here and can be selected.

LEEK Mr T Test -							🛔 Hello Georg		
245	Applications								
Ciens	● ✓ Active	🗂 18 October 2022	A Submit Application					A	ditional Applicants
Products	Your Applicants								
Application Form	• Create New	Client							
£ Lending Criteria	Forenames	Sumame	D.O.B.	Email/Qsername	Road	Town	Postcode	Phone	Select
0	Joe	Bioggs	01/01/1990		St. Edward Street	Look	ST13 5DL	01538 123456	0



Select the type of application being made. You will then be able to key the application.

Giers	Application Forms Please Select the Appropriate Application Form
Products	Forms
Application Form	Portfolio Buy to Let Application (Dot22)(001PBTL)
£	Buy to LetMolday Let Application (ICd22)001BTU
L Lending Criteria	Residential Application (Oct22V01R)
🕜 Help	

3.1 Application Completion

Applicants 🕸 TTest 🖨 🗸				
		/ct22V001R)	plication (Oct22V001R)	sidential /
	07 10 00	Alcant Details	2 2. Applicant Details	01
		 icant Details 🔪 🚥 🔪 🛤 🛛 🐿 🕬	2. Applicant Details	

Please check that all client names are shown at the top of the page, if not refer to the FAQ's for guidance.

When all questions have been answered on each page select Next in order to proceed to the next page. If required you can also return to the previous page by selecting Previous.

Once you have completed all sections, you will be taken to the summary page, any sections not completed will be highlighted in **Red**.

If a section is highlighted Red then **MANDATORY** questions are incomplete (these sections are defined with a **red outline**). You can go to the relevant section via the summary page by selecting sections highlighted **Red**.

NOTE:

A signed declaration and direct debit mandate will be required before a mortgage offer can be issued. You can print off the application by clicking the print icon located in the top right-hand corner. Alternatively you can obtain a copy of the declaration and DDM from the literature section of our website **leekbs.co.uk/intermediaries/intermediary-useful-forms/**



If all mandatory questions have been completed you can then select Complete Application Form (the application will now be locked for further editing, should further editing be required please call 0808 280 9309)



PLEASE NOTE THAT THE APPLICATION IS NOT FULLY SUBMITTED AT THIS STAGE

3.2 Application Submission



Once you have selected Complete Application Form you will then be taken to the final submission page. Please upload any supporting documents that are required. Then, insert a file description and document type from the dropdown box and then click **upload**.

If you need to leave the application prior to uploading documents, please refer to our FAQ's for instructions on how to complete this stage as you will be unable to return to this page.

	LEEK Malary Society
You are a	lmost ready to submit your application
You have completed al It will be necessary	I the necessary forms. Before you can submit an application. to upload at least one item of supporting documentation.
Please upload your sup	porting documents
The	re are no documents currently uploaded.
Please upload files of File Description	type jpeg, png or pdf only. (Up to 4MB per document)
	A Submit Application
No documents have related customer d	been uploaded for this customer. Please ensure that the ocuments and customer notes are up to date before the application is submitted

 Please make sure that you fill in the file description when completing the upload of any documentation.

When this has been done select Submit Application to complete.

The following message will now be displayed confirming successful submission of the application. Select Ok to proceed.



Post Submission



4.1 Downloading/Printing

You will need to access the relevant client from the clients screen by clicking on the clients forename or surname.

LEE	K.		🛔 Helio George Simpson you are logged in	•	≡
2	\mathbf{X}	Your Clients			2
	Clients	🕂 Create Nev	r <mark>Gient Q</mark> Enter search criteria	10	•
0	Products	Forenames + Su	rname 🔿 D.O.8. 🔿 Email/Username 🔿 Phone 🔿 Loan Amount 🔿 Product Code 🔗 Other Applicants 🔿 Statur		

Select (+) in the applications section in order expand the field.

Applications	2
Add Add	itional Applicants 嶜

This will then display the following section. Select Completed to show Details of the Application. You can then either View the application on a web page ready to print or Download as a PDF which can be saved for your records.

III Applications	1
o ✓ Submitted 📋 18 October 2022	Additional Applicants 🖀
Application Process Status To complete a joint application, please select the blue add button at the top right side of this page. If you require any assistance in completing your application please either refer to the Guide to inte Online which is available using the help button on the left of this page, or telephone our intermediary Mortgages Team on 0008 281 9309.	ermediaries
Application Forms Details of the Application Forms for this application	
Residential Application (Oct22V001R) Started: 18 October 2022 10:55 Last Ledited: Tb October 2022 10:54 UTC Stato: - Completed	
Actuals of Application	
Cancel Application	





You will need to access the relevant client from the clients screen by clicking on the client's forename or surname.

♦ LEEK Building Scorety							💄 Hello George Simpson you are	logged in	C	≡
5m8	🕍 Your Clie	ents								2
Clients	🛨 Create	New Client	Q Enter s	earch criteria					10	٥
Products	Forenames A	Surname	D.O.B.	Email/Username	Phone	Loan Amount	Product Code	Other Applicants	Status	
£ Lending Criteria	Joe	Bloggs	01/01/1990		01538 123456				No Applicatio	uns
🕜 Help	т	Test	01/01/1990		01538 111 111	25000	1822 - 2 Year Discounted Mortgage, pay rate of 4.05%, up to 95%		Submittee	ł
O	Showing 1 to 2 of	of 2 entries						First Previous 1	Next 1	Last

At the bottom right of this screen you will be able to upload documents. Please ensure that you click save client details once you have finished uploading documents.

Notes		
New	Control De Control De	
Note	Created By Created On	
	+ Add Note	
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Client Documen	ts	
Client Documen	ts	
Document	ts Type	
Client Documen Document	tS Type Customer declaration	
Client Documen Document	tS Type Customer declaration Cft tot	
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Client Documen Document	ts Type Customer declaration Customer declaration for total hosen type jpeg, png or pdf only. (Up to 4MB per document)	
Client Documen Document 1 Choose File No file of File Description	ts Type Customer declaration Customer declaration rosen type jpeg, png or pdf only. (Up to 4MB per document) Select Vpload	
Client Documen Document 1 Choose File No file ch Please upload Nies of File Description	ts Type Customer declaration Customer declaration	
Client Documen Document	ts Type Customer declaration Customer declaration	





You will need to access the relevant client from the 'Clients' screen by clicking on their forename or surname.

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1.1	Your Clie	nts								1
Clients	🕂 Create	New Client	Q Enter s	earch criteria					10	٥
Products	Forenames A	Surname 🔾	D.O.B.	Email/Username	Phone O	Loan Amount	Product Code	Other Applicants	Status	
£ Lending Criteria	Joe	Bloggs	01/01/1990		01538 123456				No Applicatio	ons
🕜 Help	Ţ	Test	01/01/1990		01538 111 111	25000	1822 - 2 Year Discounted Mortgage, pay rate of 4.05%, up to 95%		Submitte	d
0										

You will now need to expand the case update icon.

Clients	Applications	A							
Products	 Case Updat Create A New 	e - 16 July 2020 - £75,000.00 - 1	1305 - 2 Year Fixed Rat	te Mortgage of 1.	43% until 30/11/2022,	up to 80%		O Create A Net	w Joint Application
Application Form									
£ Lending Criteria	Client Details								- 2
Help	Title	Mr V			No	otes			
O	Forenames	Test	Surname	August	No	ote	Created By	Created On	
	Date of Birth	01/01/1980						+ Add Note	
	Postcode	ST13 5DL	Lookup						
	Property Name	Leek United Bldg Soc							

To view the mortgage offer, select the 'Mortgage Offer Produced' icon and the offer can then be viewed in a PDF format.

Clients	 ■ Applications Case Update - ⁽¹⁾ 16 July 2020 - £75,000.00 - 1905 - 2 	2 Year Fixed Rate Mortgage of 1.43% until 30/11/2022, up to 80%	
Products Application Form			
£ Lending Criteria		Application Processing Mortgage Offer Produced	
G	Description	Admin Document	Broker Document
	Offer Produced & Uploaded	View	Upload





Q. I am trying to register but I am being told that my email address is invalid?

A. This is usually because you have registered previously. Please return to the login screen and follow the forgotten password route if you don't know your password.

Q. I have completed a DIP but can't see the client details?

A. Our Decision in Principle system is separate to Intermediaries Online. Details won't be carried through but you will be asked for a DIP reference number if applicable.

Q. I didn't upload documents when I completed the application and now I cannot return to the same screen?

A. You won't be able to return to the same document upload screen that you saw when you completed the application, however the application cannot be submitted to Leek Building Society until at least one document has been uploaded.

Select the relevant client on your clients screen by clicking on their forename or surname

LEEK							🚢 Hello George Si	mpson you are logged in		• ≡
9 _m 9	Your C	lients								1
Clients	🕂 Creat	te New Client	C Enter se	arch criteria					10	٠
Products	Forenames	Surname	9.0.8. 0	Email/Username	Phone O	Loan Amount	Product Code	Other Applicants	Status	
£ Lending Criteria	Joe	Bloggs	01/01/1990		01538 123456				No Applicat	ions

At the bottom of this screen you will be able to upload documents. Once this has been done, the submit application button at the top of the screen will turn green, when this happens please click this button to fully submit the application.

● + Astive 10 October 2022	A sabrezoolome		Abbrowi Appicents 🛎 🧧
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Application Process Starts Riconservices parts and	and a state more the second state page if you make any estimate it are not	entregunar sega estatu duran a timor tabara de Oulor ta intermediaria. Oni na attain la naviatira angebe int	episteria di ferministrazio antra ferenzia internazia forgagia
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	Hers's Humber		
Matte Marson			

FAQs (Continued)



Q. How do I access a partially completed application form?

A. Any application that has been partially completed will be saved at the point it was left and can be accessed in order to complete the application.

In order to access a partially completed application simply select active in the clients screen.

Q. I have started completing the application but how do I add another applicant?

A. Select clients from the menu. You will be told that you are leaving an active application, please select ok.

LEEK Mr T Test -	Hello George Simpson you are logged in		
de clients	Residential Application (Oct22V001R) Applicants 🔮 TTest	₽	1
Products			
Application Form			
£ Lending Criteria	Previous	Next	
🕜 Help	1. Mortgage Requirements		
0	Application Type		

Select the client currently named on the application from the clients screen by clicking on the client's forename or surname.

Forenames	▲ Surname	0 D.O.B.	Email/Username	O Phone O	Loan Amount	Product Code	Other Applicants	Status
Joe	Bloggs	01/01/1990		01538 123456				No Applications
т	Test	01/01/1000		01530 111 111	35000	1022 Diversion and Masteria and Market and		A set of

Additional Application				
	•	Active 18 October 2022	A Submit Application	Additional Applicants 😸 🕒 Add
		•		

You can then either select an existing client or create a new client. Once you have selected/created your new client, click on the pending box, then select details of application.

Products	Active 18 October 2022 A Submit Application
Application Form	Anniiration Process Status
Lending Criteria	To complete a joint applications, please teleficit the blue galaroution at the top right side of this page. If you require any assistance in completing your application please either refer to the Guide to Intermediaries Online which is available using the help button ourse left of this page, or telephone our intermediary Mortgages Team on 0608 281 9309.
e Help	PENDING Application Forms
	Details of the Application Forms for this application Residential Application (Oct22V001R) Started: 18 October 2022 13:11 Last Updated: 18 October 2022 13:11
	Details of Application

You should now be able to see both applicants on the application form.

LEEK Mr T Test -	💄 Hello George Simpson you are logged in	• 🔪 ↔ ≡	
201	Residential Application (Oct22V001R) Applicants 🔮 TTes	est Joe Bloggs 🔒 🖌	
Ciens .			
Products			
Application Form	Previous	Next	
£ Lending Criteria			

FAQs (Continued)



Q. How do I remove an applicant from the application form?

A. Unfortunately once an application has been created you will not be able to remove an applicant. Please contact the team on 0808 281 9309 who will advise whether a new application will be required.

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

A. All applications must be submitted with at least one item of supporting documentation. Our Mortgage Processing Team will be in touch to advise you what, if any, further documentation is required.

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. What if I am part way through keying the application and I have to log out, will all my work be lost?

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

Q. What if I have an application with more than 2 applicants to submit?

A. You are able to submit applications for up to 4 applicants using Intermediaries Online.

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

A. Please contact our Intermediary Mortgages Team on 0808 281 9309.

For queries before submission please contact the Intermediary Mortgages Team, Monday to Friday, 9am - 5pm



Phone: 0808 281 9309 Email: intermediary.mortgages@leekbs.co.uk

For queries post submission please contact the processing team, Monday to Friday, 9am - 5pm

Phone: 01538 714089 Email: mortgage.processing@leekbs.co.uk

Please Note: Calls may be monitored and recorded for training purposes

Leek Building Society, Customer Service Centre, 50 St. Edward Street, Leek ST13 5DL t: 0808 281 930

Branches throughout Staffordshire, Cheshire, Shropshire and Derbyshire Leek Building Society is a trading name of Leek United Building Society, which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority with firm reference number 100014. Our details can be found on the Financial Services Register at https://register.fca.org.uk/s/. Leek United Building Society's address for service is 50 St. Edward Street, Leek, Staffordshire ST13 5DL.

intermediary.mortgages@leekbs.co.uk leekbs.co.uk/intermediaries