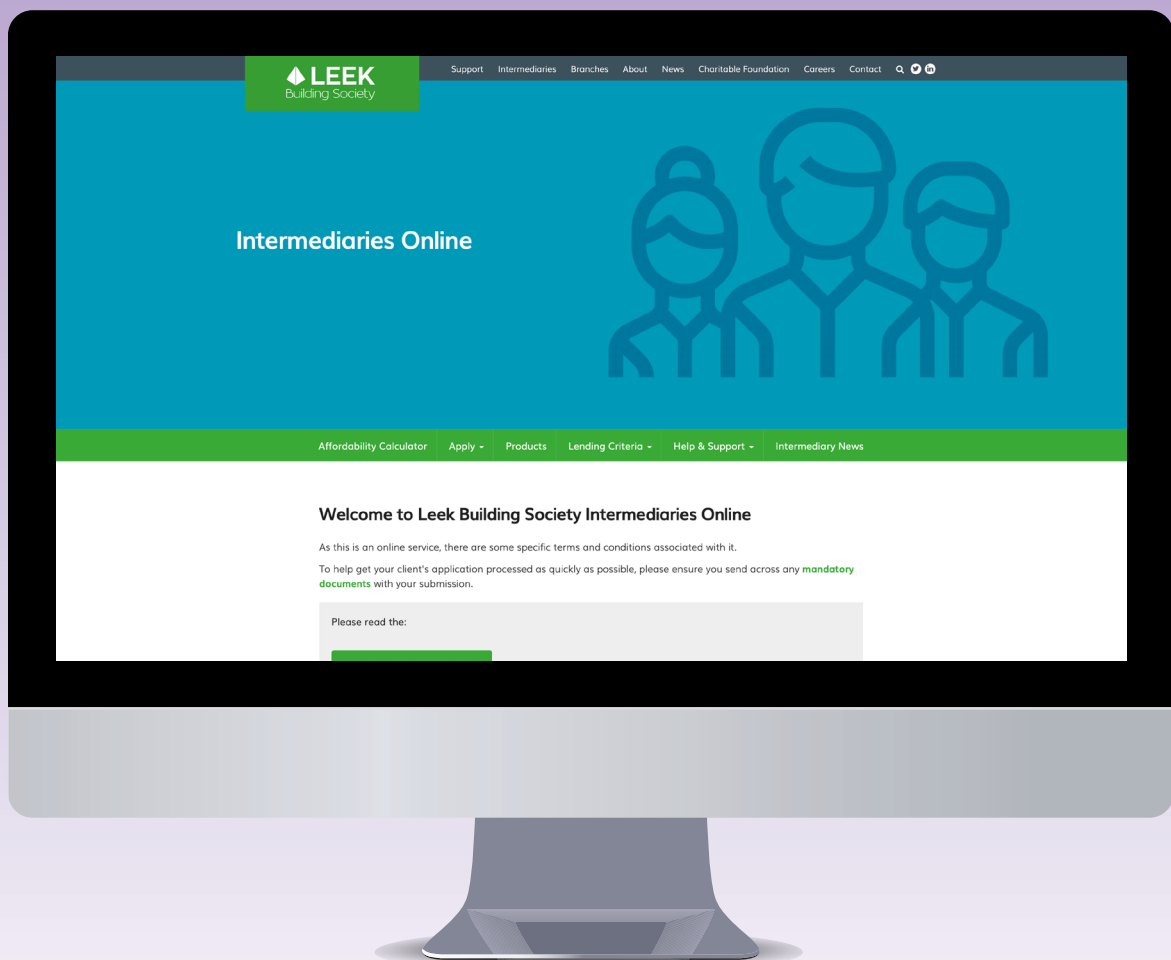


Intermediaries Online User Guide



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**:

LEK Building Society

Welcome to Intermediaries Online

individual assessment

EXISTING BROKER LOGIN

User Name / Email Address

Password

Forgot Password

Register Login

1.1 Online Registration (Continued)

Then select **New Registration** and **Next** to continue

Registration Type

Please select the type of Registration you wish to complete.

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

Already Registered ? **Next**

Complete your details and then select **Next**

Your Details

Email Address

Select Title

Please select a Title

Full Name

Select Job Title

Please select a Job Title

Password

Confirm Password

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. !£\$%^&*#)

Previous **Next**

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

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.**

Organisation Details

FCA Number

Organisation Name

Trading As Name

Post Code **Lookup**

Property Name

Property Number

Road

District

Town

County

Phone Number

Network

Mortgage Clubs

Previous **Next**

Organisation name should be the name that corresponds with your FCA number.

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

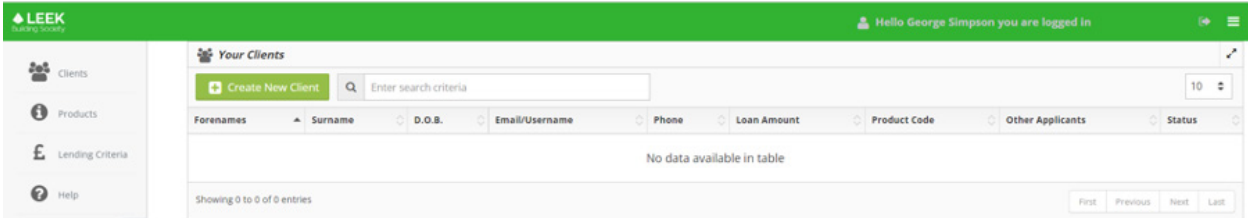
If the network you are part of is not listed then please telephone us on **0808 281 9309**.

Creating a Client

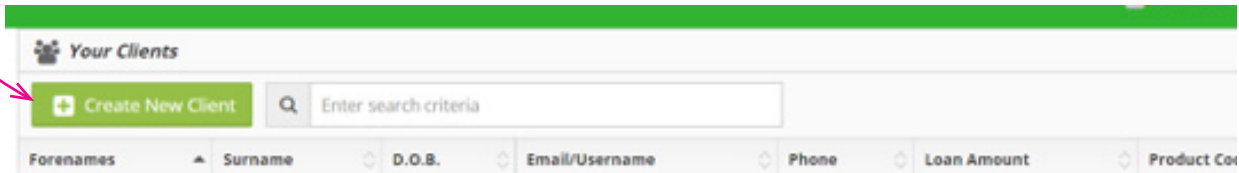
2

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

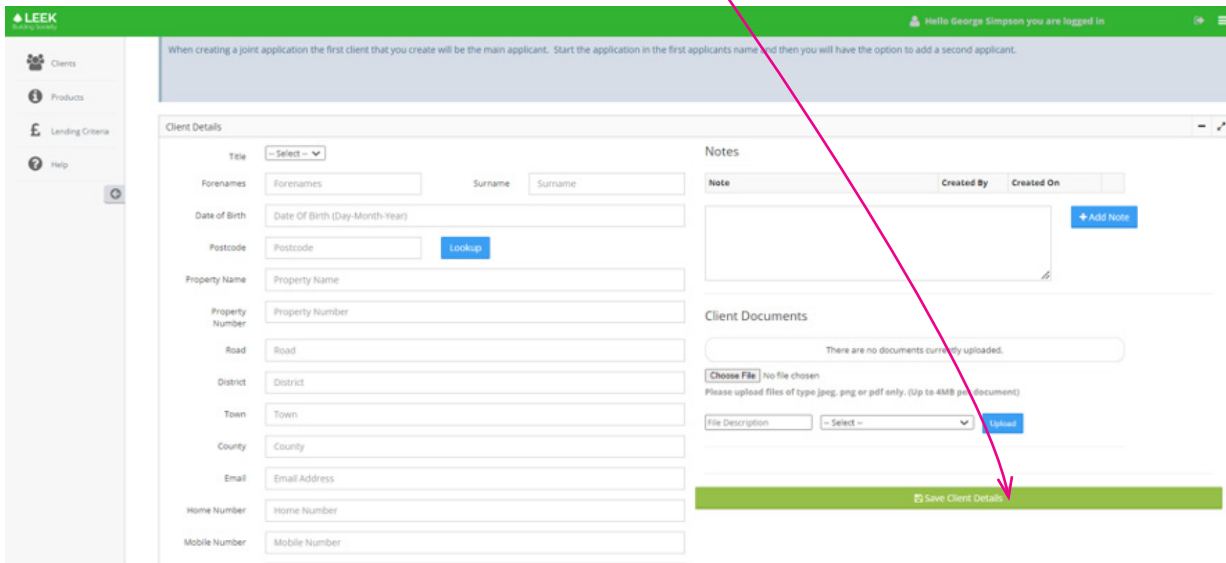
If you have previously used the Intermediaries Online and this application is for an existing client, please select the client by clicking on their surname.



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.



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



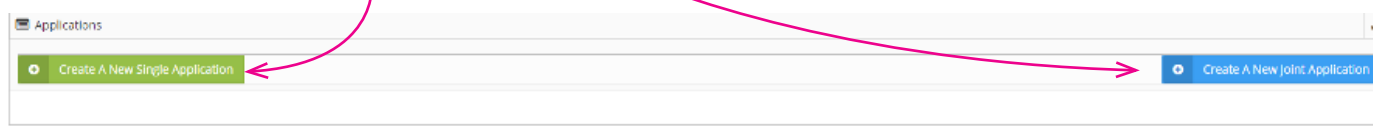
A message will be displayed in the top right hand corner to confirm the client has been saved successfully.

2.1 Notes and Updates

Notes are for your own use so please **do not use** 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

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.



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.

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.

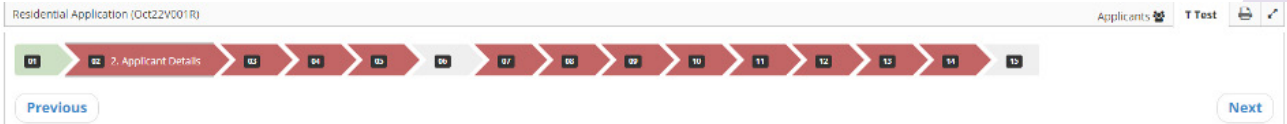
| Forenames | Surname | D.O.B. | Email/Username | Road | Team | Postcode | Phone | Select |
|-----------|---------|------------|----------------|------------------|------|----------|--------------|--------------------------|
| Joe | Bloggs | 01/01/1990 | | St Edward Street | Leek | ST13 5DL | 01538 123456 | <input type="checkbox"/> |

Once all applicant details have been saved then select Application.



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

3.1 Application Completion



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

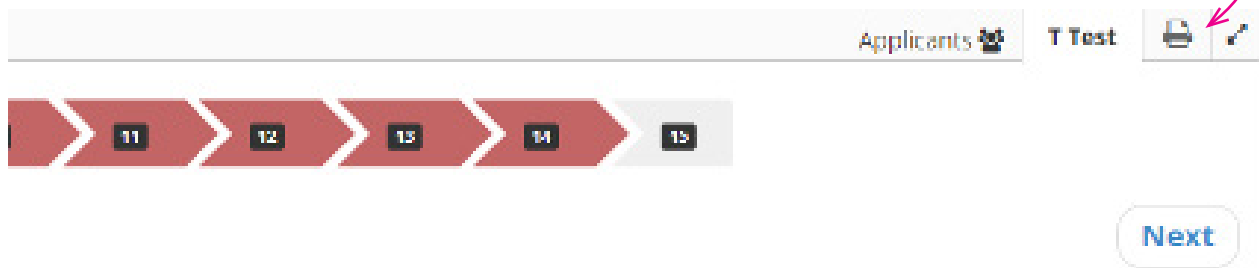
When all questions have been answered on each page select Next in order to proceed to the next page. If required you can also return to the previous page by selecting Previous.

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)

Complete Application Form

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 Building Society

You are almost ready to submit your application

You have completed all the necessary forms. Before you can submit an application, it will be necessary to upload at least one item of supporting documentation.

Please upload your supporting documents

There are no documents currently uploaded.

Choose File No file chosen

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

File Description -- Select -- Upload

Submit Application

No documents have been uploaded for this customer. Please ensure that the related customer documents 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.

LEEK Building Society

Thank you for your Application!

Thank you very much for your application we will be in touch soon.

IMPORTANT

Please note that case notes should be uploaded as a document rather than adding post submission to the notes box which is for your own notes only, we will not see these.

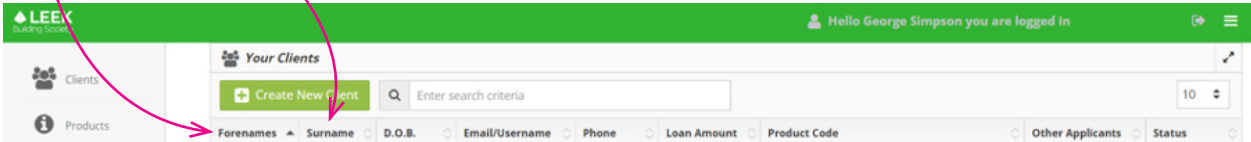
Ok

Post Submission

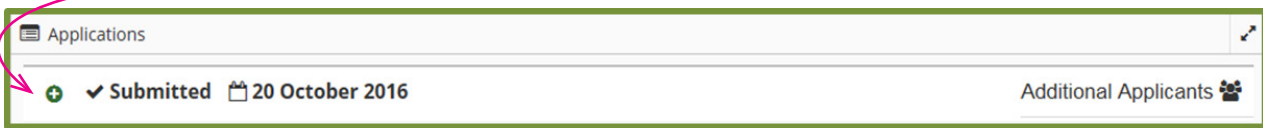
4

4.1 Downloading/Printing

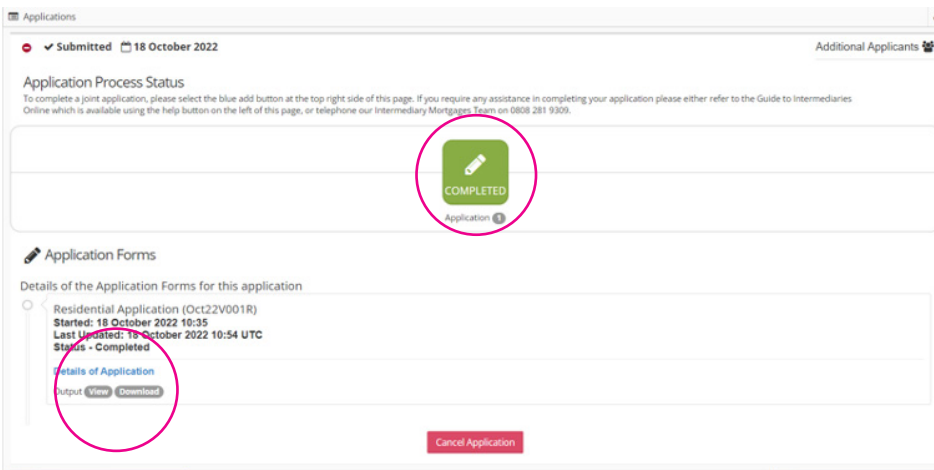
You will need to access the relevant client from the clients screen by clicking on the clients **forename** or **surname**.



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



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.



4.2 Document Upload

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

LEAK
Hello George Simpson you are logged in

Your Clients

Create New Client

Enter search criteria

| Forenames | Surname | D.O.B. | Email/Username | Phone | Loan Amount | Product Code | Other Applicants | Status |
|-----------|---------|------------|----------------|---------------|-------------|---|------------------|-----------------|
| Joe | Bloggs | 01/01/1990 | | 01538 123456 | | | | No Applications |
| T | Test | 01/01/1990 | | 01538 111 111 | 25000 | 1822 - 2 Year Discounted Mortgage, pay rate of 4.05%, up to 95% | | Submitted |

Showing 1 to 2 of 2 entries

First Previous 1 Next 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

| Note | Created By | Created On |
|------|------------|------------|
| | | |

+ Add Note

Client Documents

| Document | Type |
|----------|----------------------|
| 1 | Customer declaration |

Choose File No file chosen

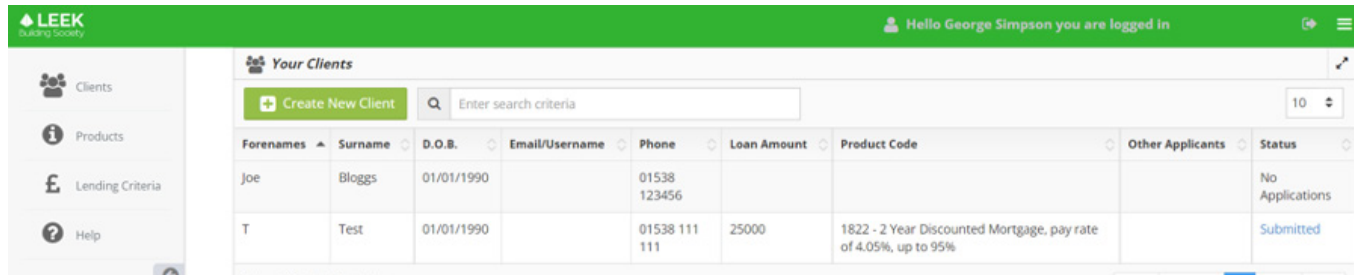
Please upload files of type jpeg, png or pdf only. (Up to 4MB per document)

File Description -- Select -- Upload

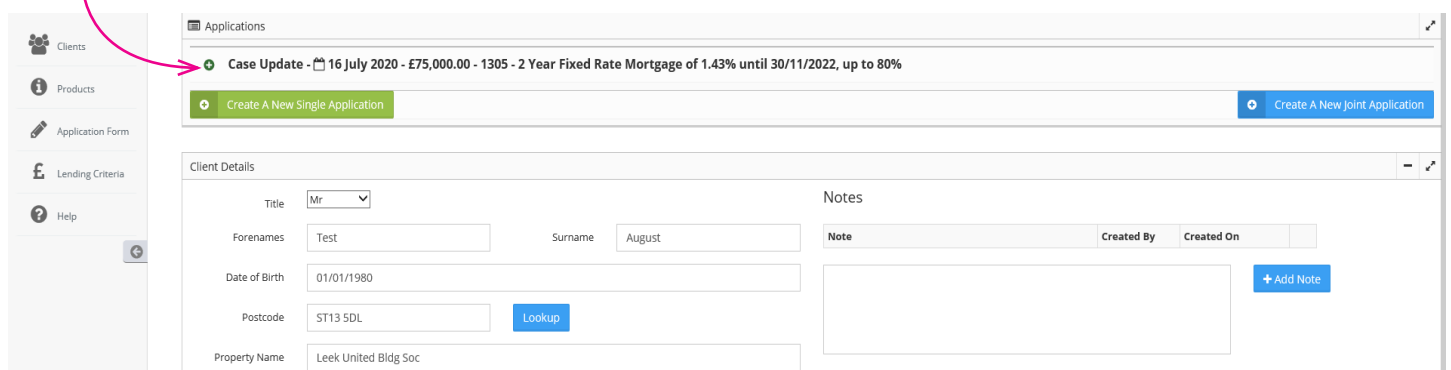
Save Client Details

4.3 Downloading a Mortgage Offer

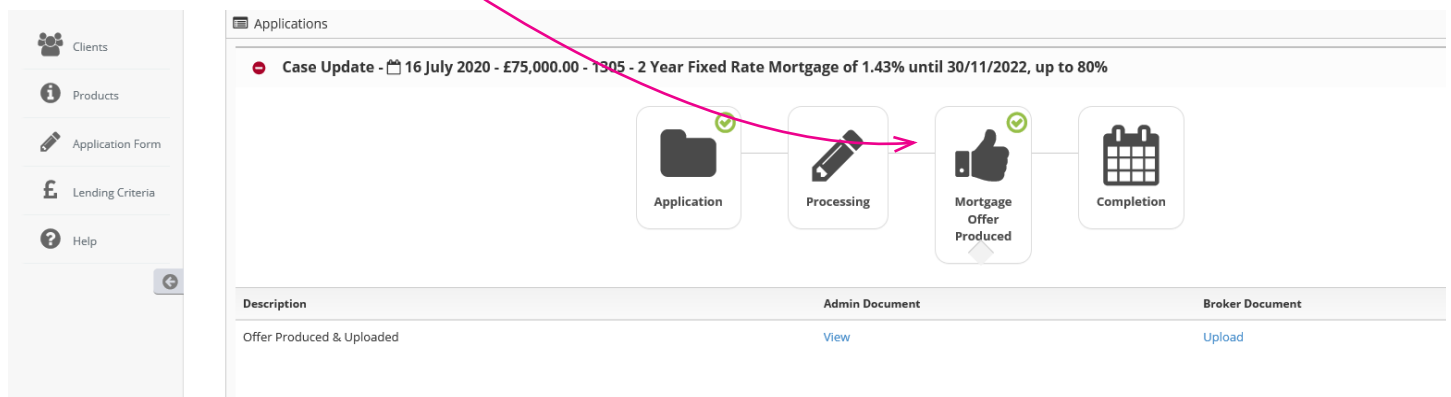
You will need to access the relevant client from the 'Clients' screen by clicking on their **forename** or **surname**.



You will now need to expand the case update icon.



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



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.

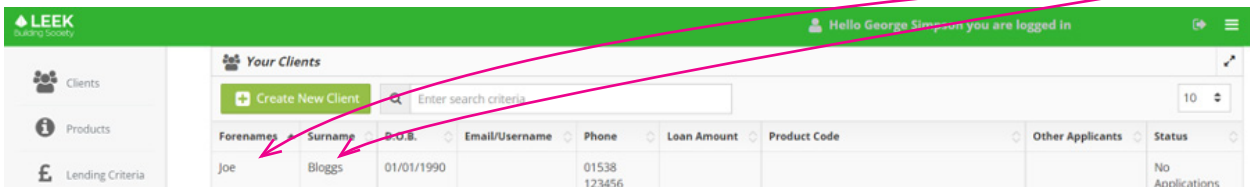
Q. I have completed a DIP but can't see the client details?

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.

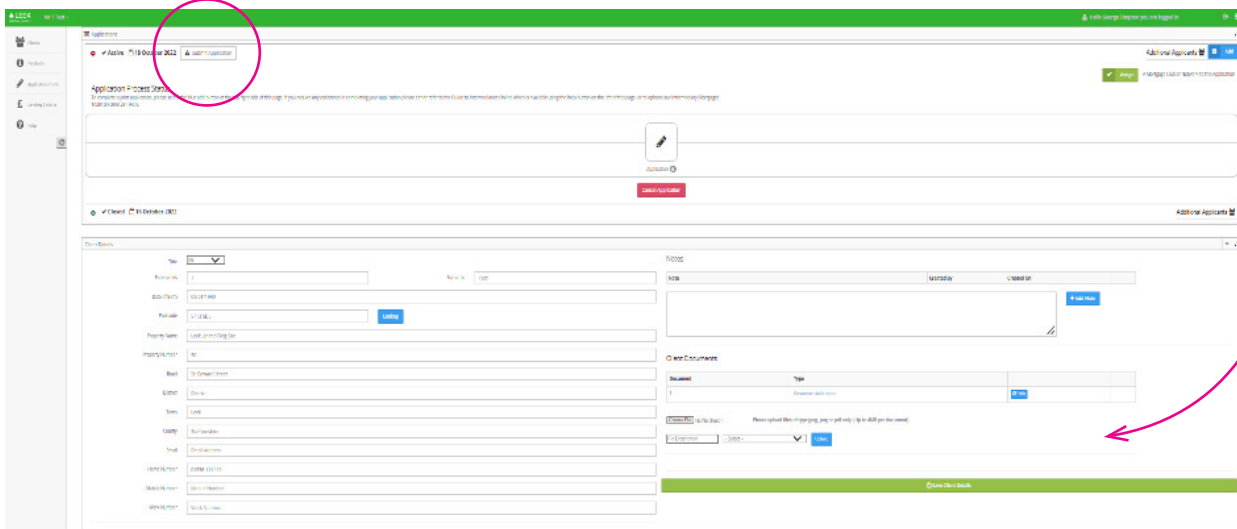
Q. I didn't upload documents when I completed the application and now I cannot return to the same screen?

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**



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.



FAQs (Continued)

5

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?

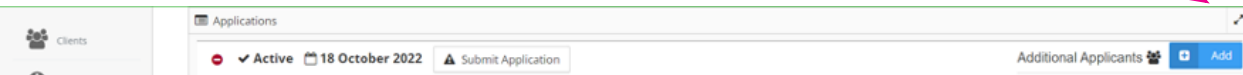
A. Select **clients** from the menu. You will be told that you are leaving an active application, please select ok.



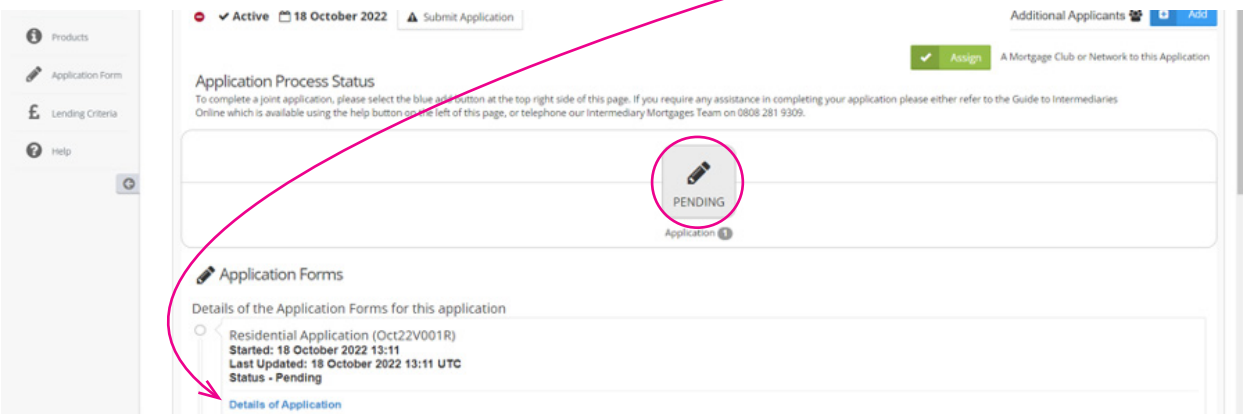
Select the client currently named on the application from the clients screen by clicking on the client's forename or surname.

| Forenames | Surname | D.O.B. | Email/Username | Phone | Loan Amount | Product Code | Other Applicants | Status |
|-----------|---------|------------|----------------|--------------|-------------|--------------|------------------|-----------------|
| Joe | Bloggs | 01/01/1990 | | 01538 123456 | | | | No Applications |

Then select 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**.



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



FAQs (Continued)

5

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