

Progressive Online: Guide to changing your clients product

Your clients application will be saved as “Draft” in the Application pipeline table.

Search customers, applications, illustrations or decisions							Search
Illustrations	Decisions In Principle	Applications	Pending Switches				
Application	Customer	Created Date	Status	Amount	Product	Actions	
70100384669	Joe Bloggs	30/09/2022	Draft	£70,000.00	1.95% fixed rate for 5 years (no fee)		

When the application is ready to be completed and submitted, open the draft application by selecting the Application number.

The Application Summary page will load:

Application - 70100384669

[Submit Application](#) [Delete](#) [Clone](#)

Joe Bloggs Applicant Name	+447887887887 Mobile	joe@bloggs.test Email	1.69% fixed rate for 2 years (no fee) Product	£70,000.00 Loan Amount	20y 0m Term
£343.93 Estimated Monthly Repayment	Draft Status				

Client Information

Main Applicant - Joe Bloggs

[Edit](#)

[Hide Information](#)

Title	Mr	Date of Birth	01/01/2000
First Name	Joe	Marital Status	Other
Middle Names		Gender	Male
Previous Names		Email	joe@bloggs.test
Surname	Bloggs	Mobile Phone	+447887887887
		Nationality	British
		National Insurance Number	JL123456C

Additional Client Details

Do your client(s) own any other property either outright or with a mortgage?

Please give details here

If your client(s) have existing property, is this property being sold?

If your client(s) are selling an existing property, what is the sale price of this property?

Please confirm if your client(s) have/had any investment or mortgage accounts with the Society

Please give details here

Financial Dependents

There are no Dependents

Product Selection

[Edit](#)

Product	1.69% fixed rate for 2 years (no fee)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	20y 0m
Estimated Monthly Repayment	£343.93		

Property & Valuation

[Edit](#)

Property Information

Address Line 1	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2	Progressive House	Address Line 5	
Address Line 3	33-37 Wellington Place	Post code	BT1 6HH
Property description	Detach...	Year built	1960
Warranty type	Not Ap...	Property purpose	Wholly ...
New type	Not Now	Property tenure	Freehold
Number of bedrooms	0	Garage Type	Select ...
Number of bathrooms	0	Construction type of roof	Slate
Number of kitchens	0	Construction type of walls	Brick
Number of reception rooms	0		
Number of floors	0		

Before selecting ‘**Submit Application**’ check to ensure the product is still valid and available on the Society website.

If the product is no longer valid, select ‘**Edit**’ in the Product Selection component

Product Selection ✎ Edit

Product	1.69% fixed rate for 2 years (no fee)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	20y 0m
Estimated Monthly Repayment	£343.93		

Capture the application loan details to retrieve alternative products.

Select a different mortgage product and click **'Select Product'**

Amend Mortgage

All Progressive's mortgage products move onto the Standard Variable Rate (SVR), currently 5.99% (variable), after the initial rate period.
YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.

Available Products	Initial Interest Rate	Overall Cost for Comparison (APRC)	ERG	Fee	Estimated New Monthly Payment
<input type="radio"/> Base Rate <small>Further Product Information</small>	5.99%	6.2%	0%	£0.00	£501.10
<input type="radio"/> 1.29% fixed rate for 2 years <small>Further Product Information</small>	1.29%	5.3%	3%	£995.00	£335.77
<input type="radio"/> 1.69% fixed rate for 2 years (no fee) <small>Further Product Information</small>	1.69%	5.2%	3%	£0.00	£343.93
<input type="radio"/> 1.29% 2 year variable discount rate <small>Further Product Information</small>	2.78% <small>(SVR 5.0% - 2.21%)</small>	5.4%	2%	£0.00	£380.55
<input checked="" type="radio"/> 1.95% fixed rate for 5 years (no fee) <small>Further Product Information</small>	1.95%	4.2%	3%	£0.00	£352.46

Cancel
Select Product

Click **'Save'** to save the new product.

The new product is now visible on the summary page

Application - 70100384669 ✎ Submit Application 🗑 Delete 📄 Clone

Joe Bloggs <small>Applicant Name</small>	+447887887887 <small>Mobile</small>	joe@bloggs.test <small>Email</small>	1.95% fixed rate for 5 years (no fee) <small>Product</small>	£70,000.00 <small>Loan Amount</small>	20y 0m <small>Term</small>
£352.46 <small>Estimated Monthly Repayment</small>	Draft <small>Status</small>				

Client Information

Main Applicant - Joe Bloggs ✎ Edit

Hide Information

Title	Mr	Date of Birth	01/01/2000
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		National Insurance Number	JL123456C

Product Selection ✎ Edit

Product	1.95% fixed rate for 5 years (no fee)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	20y 0m
Estimated Monthly Repayment	£352.46		

Property & Valuation ✎ Edit

Property Information

The application and revised product can now be submitted by selecting **'Submit Application'**