

# How to Download your Client's Mortgage Offer and Valuation

For Intermediary use only



**PROGRESSIVE**  
BUILDING SOCIETY

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# About this Guide

This guide will provide you with an overview of how to download your client's mortgage offer and valuation documents once an application has been submitted.

If you need help downloading supporting documentation/viewing notifications or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place Belfast BT1 6HH.

# Downloading your Client's Mortgage Offer and Valuation – Step 1

Once you have completed an online application for your client, you will find the summary under the 'Applications' section on the broker homepage.

To view the application summary, click on the application number found on the left hand side of the table.

To view the customer information, click on the customer's name found to the right of the application numbers.

The screenshot shows the Progressive Building Society website interface. At the top, there are social media icons (Facebook, Twitter, LinkedIn, Instagram) and the Progressive Building Society logo. The user is logged in as Danny Walker. The navigation menu includes Home, Existing Member Services, and Contact Us. A search bar is present with the text "Search customers, applications, illustrations or decisions". Below the search bar, there are tabs for Illustrations (0), Decisions In Principle (0), Applications (114), and Pending Switches (0). The Applications tab is selected, displaying a table of mortgage applications. The table has the following columns: Application, Customer, Created Date, Status, Amount, Product, and Actions. The first row is highlighted, and an orange arrow points to the application number "70100452877". Another orange arrow points to the customer name "Eamon McAvoy". The table contains 11 rows of data. At the bottom of the table, there are pagination controls showing "1" selected, and a "Show 10" dropdown menu. To the right of the table, there is a "News And Notifications" section with a date "22 May 2024 at 01:57 p.m." and a title "Offers and Valuations Updates". The notification text states: "Please be advised that mortgage offers and valuations will be available on Salesforce and no longer posted or emailed. The documents can be found in the mortgage overview page in downloadable pdf. format. In order to be notified that the offer is available to view, you must ensure you have enabled notifications within your profile. Clients will continue to receive these documents by post for now, but this will change in the future. For more information, visit the Literature section of the Society's website. Request Information / Reply". Below the notification is a "My Product Switch Documents" section with the text "There are no documents available".

Application	Customer	Created Date	Status	Amount	Product	Actions
<a href="#">70100452877</a>	<a href="#">Eamon McAvoy</a>	22/5/2024	Application being assessed	£70,000.00	4.44% 2 year variable discount rate (Green)	
<a href="#">70100452923</a>	<a href="#">Self Build</a>	23/5/2024	Application Submitted	£100,000.00	6.74% 3 year variable discount (Self Build)	
<a href="#">70100452915</a>	<a href="#">Remort Gage</a>	23/5/2024	Application Submitted	£100,000.00	4.43% fixed rate for 2 years (cashbk)	
<a href="#">70100452907</a>	<a href="#">House Purchase</a>	23/5/2024	Application Submitted	£100,000.00	4.50% fixed rate for 2 years	
<a href="#">70100452893</a>	<a href="#">Jamie Fegan</a>	22/5/2024	Application Submitted	£70,000.00	7.24% 3 year variable discount (Self Build)	
<a href="#">70100452885</a>	<a href="#">Walter White</a>	22/5/2024	Application Submitted	£70,000.00	4.53% fixed rate for 2 years (cashbk)	
<a href="#">70100452869</a>	<a href="#">Brian Peters</a>	22/5/2024	Application Submitted	£70,000.00	7.24% 3 year variable discount (Self Build)	
<a href="#">70100452850</a>	<a href="#">Susan Graham</a>	22/5/2024	Application Submitted	£70,000.00	Base Rate	
<a href="#">70100452842</a>	<a href="#">Howard Simmons</a>	22/5/2024	Application Submitted	£70,000.00	Base Rate	
<a href="#">70100452699</a>	<a href="#">Ciara Devlin</a>	15/5/2024	Application Submitted	£70,000.00	4.53% fixed rate for 2 years (legals)	

## Downloading your Client's Mortgage Offer and Valuation – Step 2

When your client's online application has been fully underwritten and offered, you will receive an email notification advising that two new documents entitled 'Offer Of Advance' & 'Offer Letter to Intermediary' (highlighted) are available to view. These can be viewed in the Application Documents section found within the application summary.

Click the action button located to the right of the documents (circled) to download as PDF.

The screenshot displays a mortgage application summary for Eamon McAvoy. The page is divided into several sections:

- Client Information:** Main Applicant - Eamon McAvoy (with an Edit button). Fields include Title (Mr), Date of Birth (3/5/1980), First Name (Eamon), Marital Status (Married), Middle Names, Previous Names, Surname (McAvoy), What gender was your Client assigned at birth? (Male), Email (emcavoy@pbsuat.test), Mobile Phone (+447472979255), Nationality (British), and National Insurance Number (JL784392D).
- Additional Client Details:** Questions about other property, existing property, and investment status, all answered 'No'.
- Supporting Documents:** A section with an Upload button and a message: "There are no documents available".
- Application Documents:** A table listing various documents with their dates and types. The last two rows are highlighted in yellow and circled in green:

Date	Type	Action
28/5/2024, 14:42	Mortgage Valuation	Download
28/5/2024, 14:42	Mortgage Valuation	Download
22/5/2024, 11:42	Mortgage Illustration	Download
22/5/2024, 11:42	Direct Debit Mandate	Download
22/5/2024, 11:42	Tariff Of Charges	Download
22/5/2024, 11:42	Mortgage Conditions 2019	Download
22/5/2024, 11:42	Mortgage App Remaining Section	Download
22/5/2024, 11:42	Mortgage App Section B	Download
22/5/2024, 11:42	Mortgage App Section A	Download
4/5/2024, 00:00	Offer Of Advance / Acceptance/One Per Mo	Download
4/5/2024, 00:00	Offer Letter To Intermediary/	Download

*N.B: Where a physical valuation has been carried out, a copy of the valuation report will also be available for you to view. If you are unable to see a valuation report, this means that we have carried out an automated valuation.*

*Please note that in order for you to be notified that your clients offer is ready, you must have notifications turned on.*

# If a Re-Offer/Offer Extension is Required

Where an amended offer or an offer extension is required and we begin to process this, you will receive notifications which appear to show that the case has been re-submitted. This is normal and is a result of us moving the case through the various stages again.

When the amended offer / offer extension is ready you will receive a new offer notification. Please note that only the new offer will be available to view / download. The original offer will no longer be visible.

### Application - 70100453091

<b>Alex Brooks</b> Applicant Name	<b>Sandra Brooks</b> Joint Applicant Name	+447479259302 Mobile	abrooks@pbsuat.test Email	7.24% 3 year variable discount (Self Build) Product	£70,000.00 Loan Amount
20y 0m Term	£552.84 Estimated Monthly Repayment	Application Submitted Status			

#### Client Information

##### Main Applicant - Alex Brooks Edit

[Hide Information](#)

Title	Mr	Date of Birth	9/6/1984
First Name	Alex	Marital Status	Married
Middle Names		What gender was your Client assigned at birth?	Male
Previous Names		Email	abrooks@pbsuat.test
Surname	Brooks	Mobile Phone	+447479259302
		Nationality	British
		National Insurance Number	JL784536D

#### 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

#### Supporting Documents

Please click [here](#) for supporting documentation requirements. Upload

There are no documents available

#### Application Documents

Date	Type	Action
20/6/2024, 08:59	Mortgage Valuation	
20/6/2024, 08:59	Mortgage Valuation	
10/6/2024, 15:50	Mortgage Illustration	
10/6/2024, 15:50	Tariff Of Charges	
10/6/2024, 15:50	Direct Debit Mandate	
10/6/2024, 15:49	Mortgage Conditions 2019	
10/6/2024, 15:49	Mortgage App Section B	
10/6/2024, 15:49	Mortgage App Remaining Section	
10/6/2024, 15:49	Mortgage App Section A	
7/5/2024, 00:00	Offer Letter To Intermediary/	
7/5/2024, 00:00	Mortgage Illustration/One Per Mortgage	
7/5/2024, 00:00	Offer Of Advance / Acceptance/One Per Mo	

Show



We hope you found this guide helpful and informative.

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