How to Download your Client's Mortgage Offer and Valuation

For Intermediary use only



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.

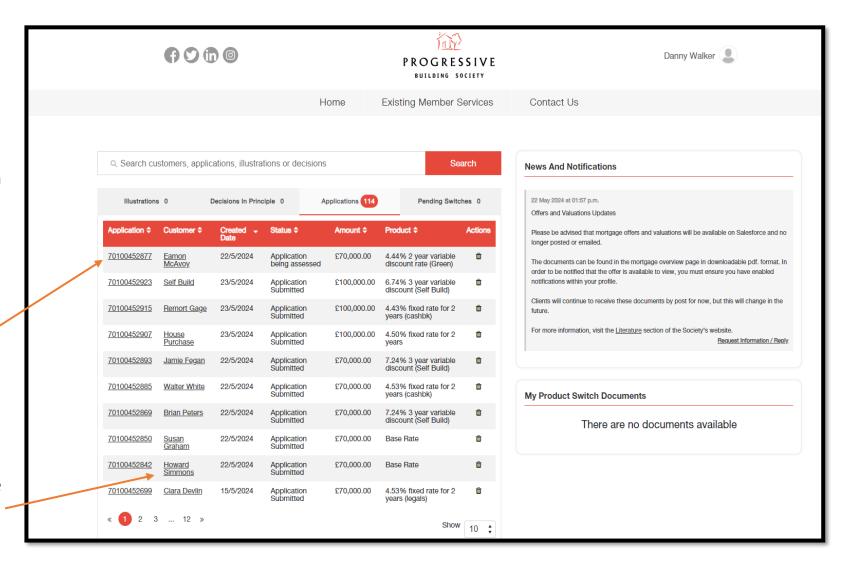
If you need help downloading supporting documentation/viewing notifications or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place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

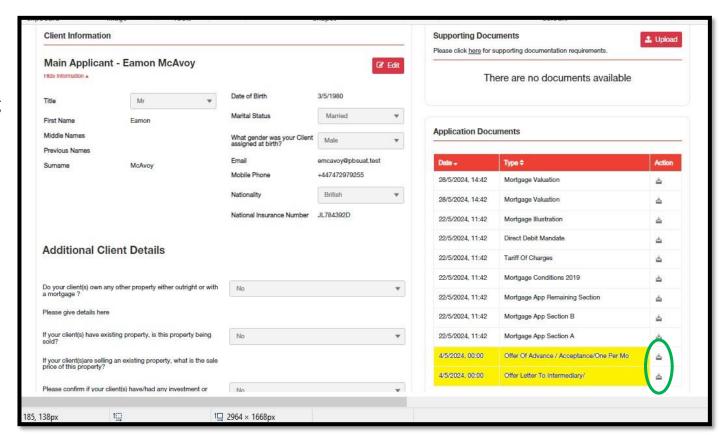
To view the customer information, click on the customer's name found to the right of the application numbers.



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.



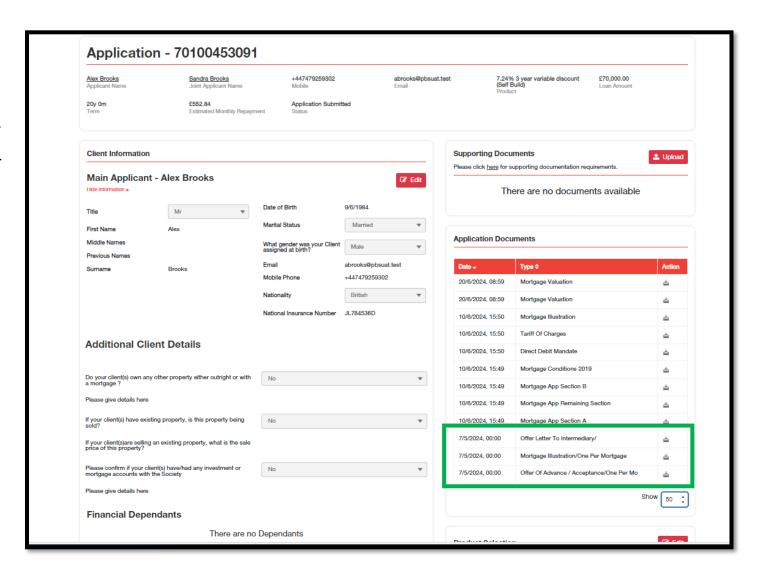
N.B: Where a physical valuation has been carried out, a copy of the valuation report will also be available for you to view. If you are unable to see a valuation report, this means that we have carried out an automated valuation.

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 resubmitted. 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.





We hope you found this guide helpful and informative.

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