

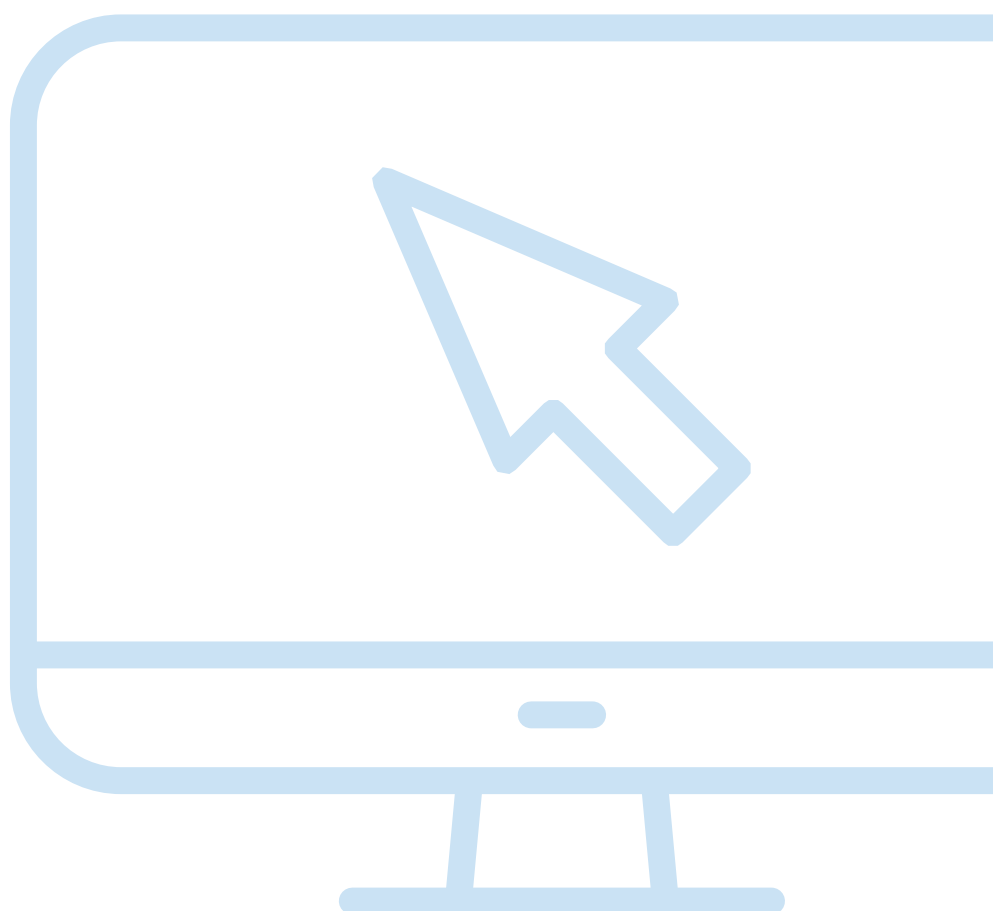
The SRBS Mortgage Hub



The easy way to submit a
Mortgage Application.

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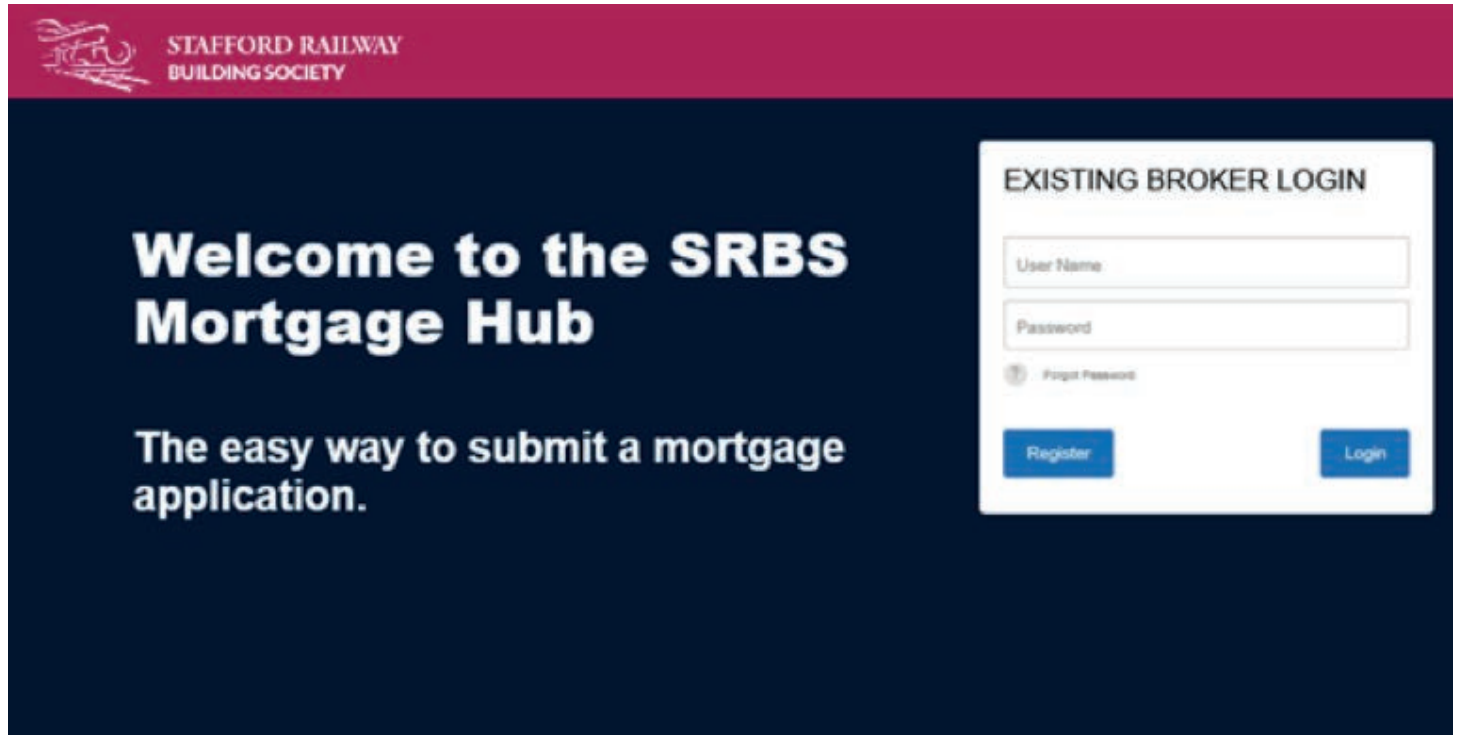
The Stafford
For Intermediaries

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Lending is subject to the Society's normal lending criteria

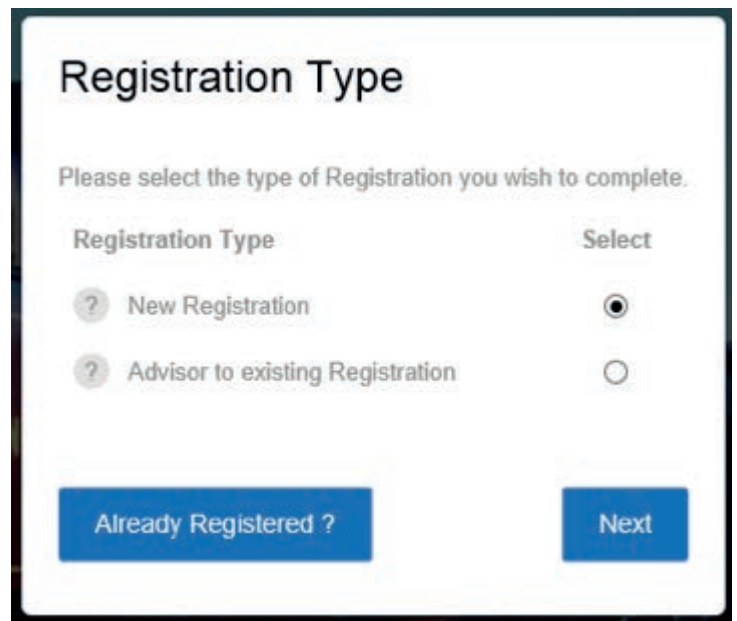
1. Online Registration

In order to register online select the following hyperlink: <https://intermediaries.srbs.co.uk>

Then select **'Register'**



Select **'New Registration'** or select **'Advisor to existing Registration'** if you aware an individual has already registered to the Mortgage Hub with your firms FCA number.



Complete the **'Your Details'** section and then select **'Next'** when complete.

Please note your email address will be your username once registered.

The 'Your Details' form includes the following fields and instructions:

- Email Address (text input)
- Select Title (dropdown menu)
- Please select a Title (red instruction)
- Your Name (text input)
- Select Job Title (dropdown menu)
- Please select a Job Title (red instruction)
- Password (text input)
- Confirm Password (text input)
- 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. !£\$%^&*#) (red instruction)
- Previous (button)
- Next (button)

Complete all relevant fields under **'Organisation Details'** and select **'Next'**.

If the network you are part of is not listed then please advise us by emailing brokers@srbs.co.uk

The 'Organisation Details' form includes the following fields and instructions:

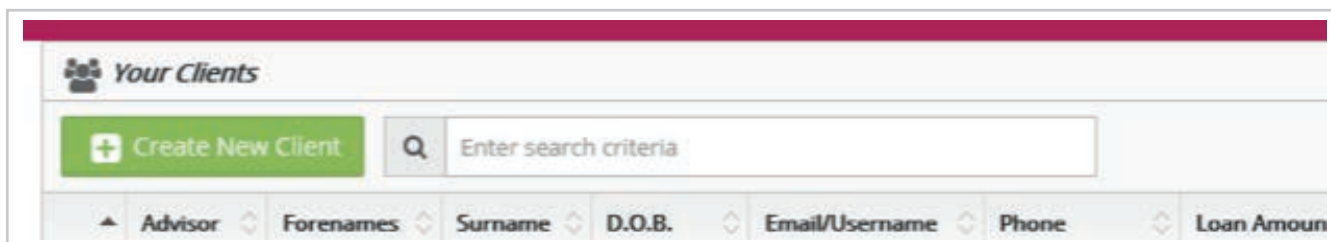
- FCA Number (text input)
- Please enter a Valid FCA Number (red instruction)
- Organisation Name (text input)
- Trading As Name (text input)
- Post Code (text input) and Lookup (button)
- Property Name (text input)
- Property Number (text input)
- Road (text input)
- District (text input)
- Town (text input)
- County (text input)
- Phone Number (text input)
- Select Network (dropdown menu)
- Select Mortgage (dropdown menu)
- Previous (button)
- Next (button)

You will be asked to confirm your marketing preferences, please leave the boxes blank if you do not wish to receive any. You will then be asked to confirm your details, if the information is correct then select **'Create Account'**.

You will then be emailed confirmation that you are registered. Please click the link provided on the email and use your user name (email address you registered with) and password to sign in.

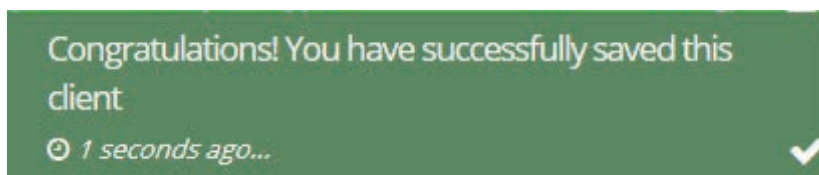
2. Creating a Client

Once logged in, the first page you will see is **'Your Clients'**. This will display a list of your current and previous clients. In order to create a client select **'Create New Client'**.



You will then be taken to the Customer Details screen. Enter all the relevant details and then select **'Save Client Details'**

When all the details have been entered a message will be displayed in the top right hand corner to confirm the client has been saved successfully.



3. Notes

Notes to support the application can also be added in the **'Client Details'** section. In order to add a note enter the relevant text in the text box and select **'Add Note'**.

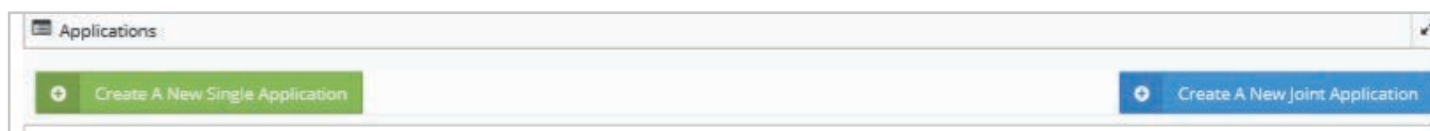


| Note | Created By | Created On |
|------|------------|------------|
| | | |

[+ Add Note](#)

4. Creating an Application

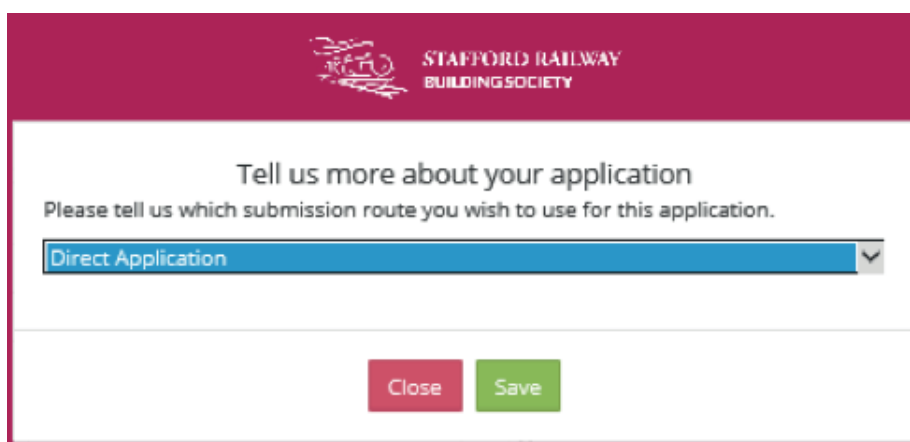
Once the customer record has been saved, you can then create the application. In order to do this you will need to select either **'Single Application'** or **'Joint Application'** in the Applications section.



Applications:

[Create A New Single Application](#) [Create A New Joint Application](#)

You will then need to select a submission route for the application. This will be either a Direct Application or the Mortgage Club/Network that you are affiliated with. Then select **'Save'**.



STAFFORD RAILWAY BUILDING SOCIETY

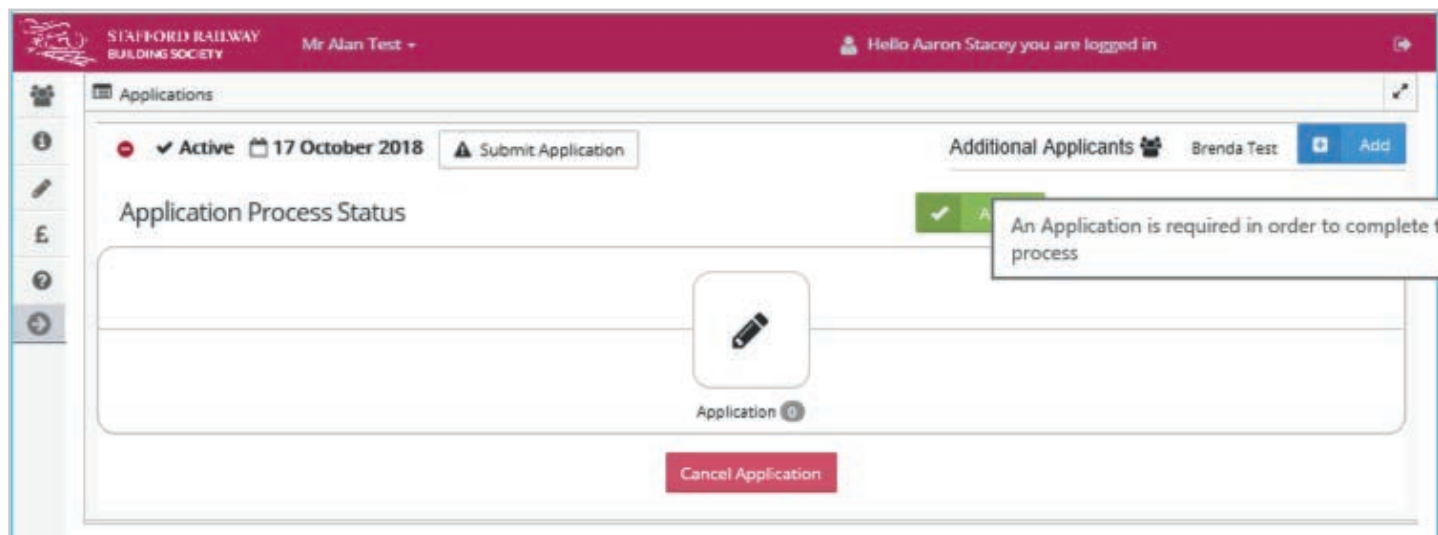
Tell us more about your application

Please tell us which submission route you wish to use for this application.

Direct Application

[Close](#) [Save](#)

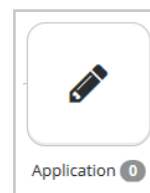
To process the application click the **'Application'** icon.



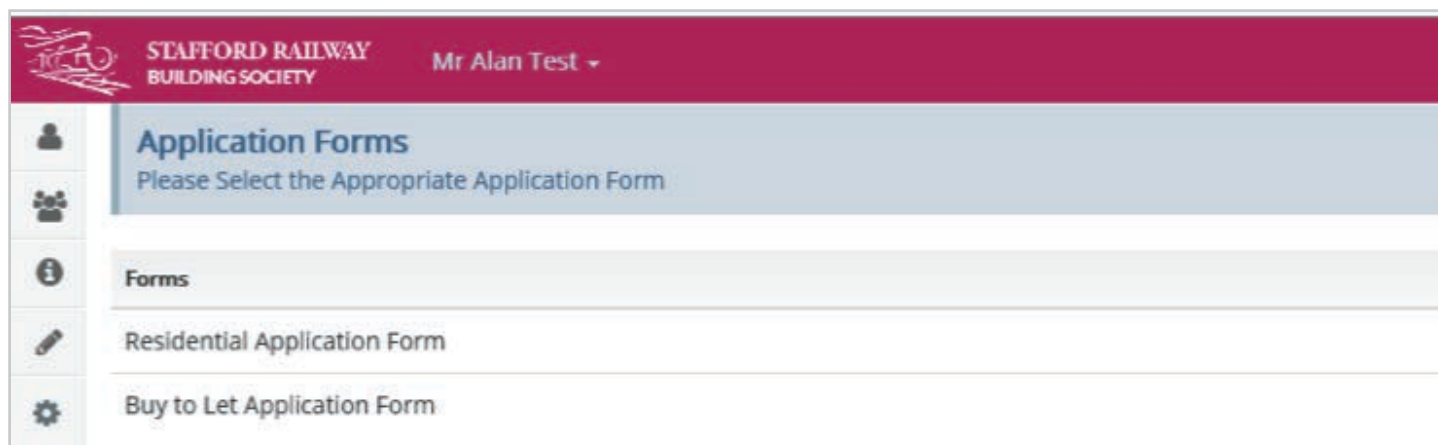
If the application is joint then you can add the second applicant by selecting **'Add'**. You can then either select an existing client or create a new one.



Once all applicant details have been saved then click the 'Application' icon.



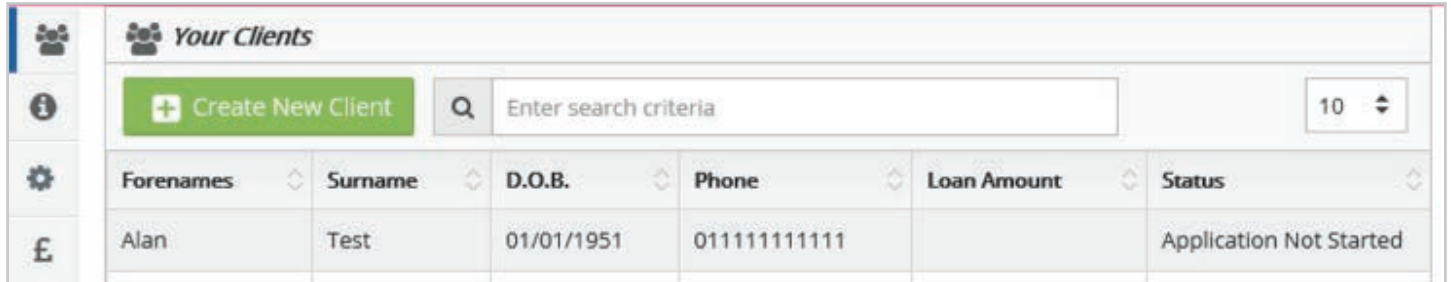
Please then select the appropriate application form to continue.



5. Accessing a Partially Completed Application

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. This will be shown as pending in the Application Process Status.

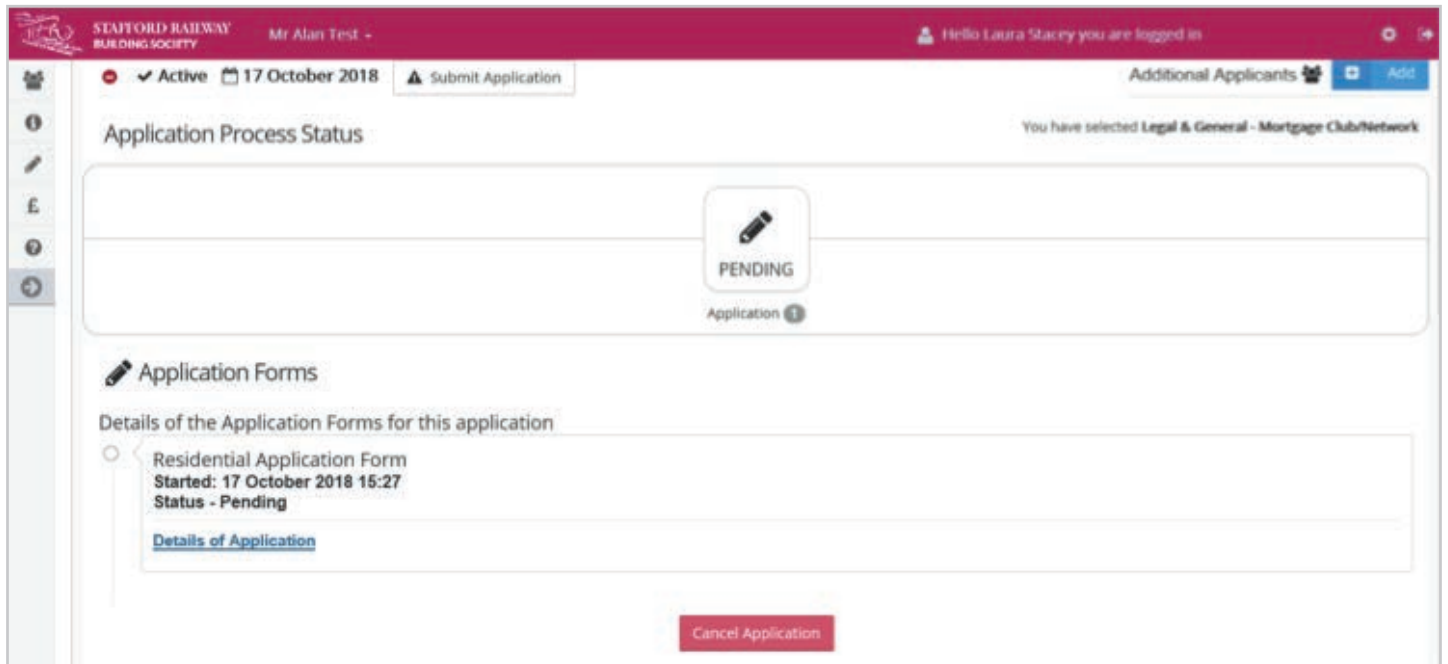
In order to access a partially completed application simply select the relevant client by clicking on their name in the **'Your Clients'** section.



| Forenames | Surname | D.O.B. | Phone | Loan Amount | Status |
|-----------|---------|------------|--------------|-------------|-------------------------|
| Alan | Test | 01/01/1951 | 011111111111 | | Application Not Started |

Select the **'Pending'** icon, this will display further details shown below. To continue inputting the application select **'Details of Application'** which will take you back to the application page.

If the client does not wish to proceed then you can select **'Cancel Application'**.



STAFFORD RAILWAY BUILDING SOCIETY Mr Alan Test - Hello Laura Stacey you are logged in

Active 17 October 2018 Submit Application Additional Applicants Add

Application Process Status

You have selected Legal & General - Mortgage Club/Network

PENDING
Application 1

Application Forms

Details of the Application Forms for this application

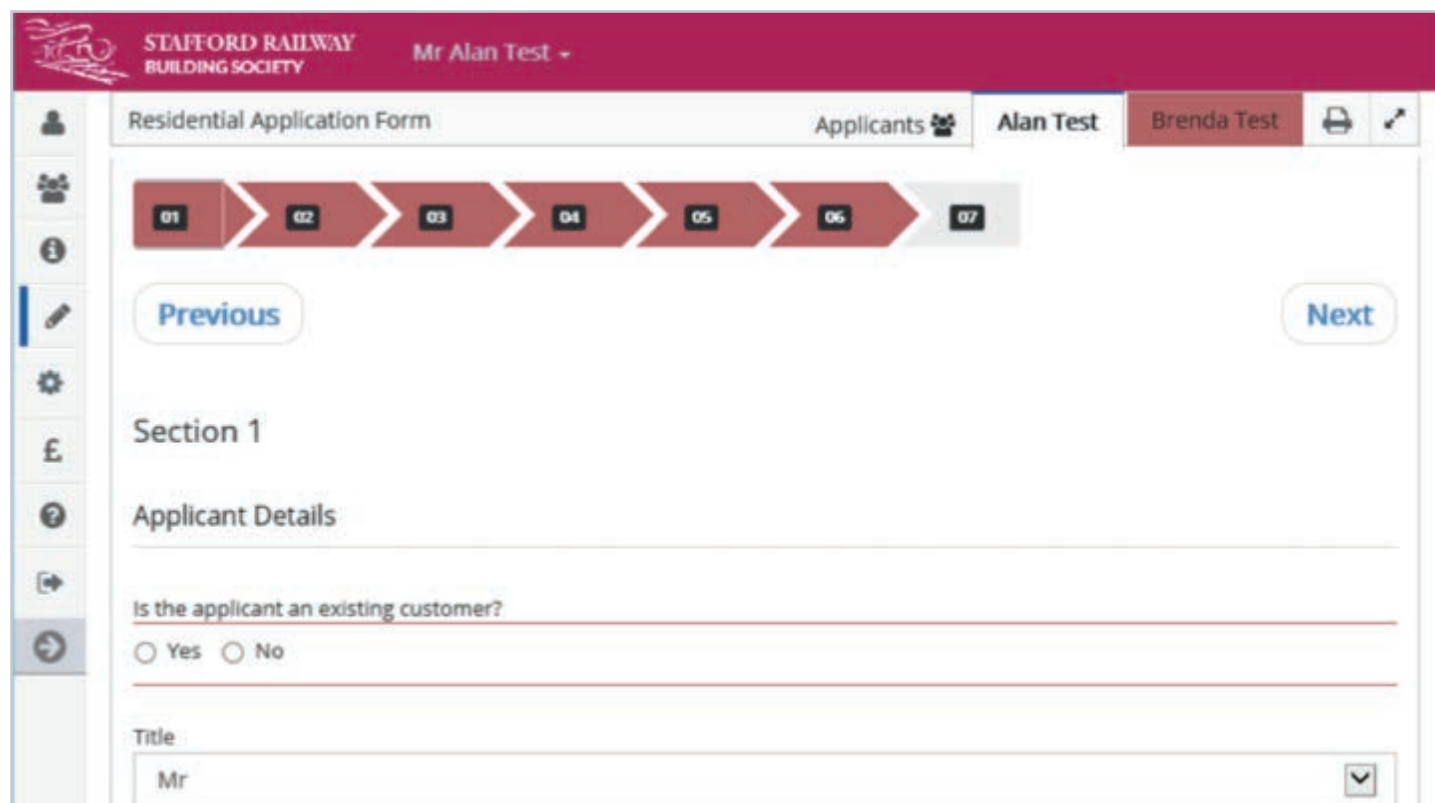
- Residential Application Form
Started: 17 October 2018 15:27
Status - Pending
[Details of Application](#)

[Cancel Application](#)

6. Application Submission

Complete each section of the application form using the **'Next'** and **'Previous'** buttons to navigate the pages.

When creating multiple applications you can alternate between the individuals by clicking their name located in the top right-hand corner of the screen.



Each section of the form will be highlighted either in **Red**, **Yellow** or **Green** on both the summary page and on the section pane at the top of the screen.



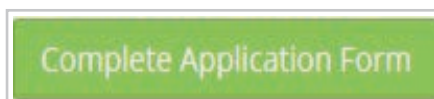
If a section is highlighted **Red** then MANDATORY questions are incomplete (these sections are defined with a **red outline**). You can go to the relevant section via the summary page by selecting sections highlighted **Red**.

Sections highlighted in **Yellow** are where not all questions have been answered but all MANDATORY questions have been completed and the application can be submitted.

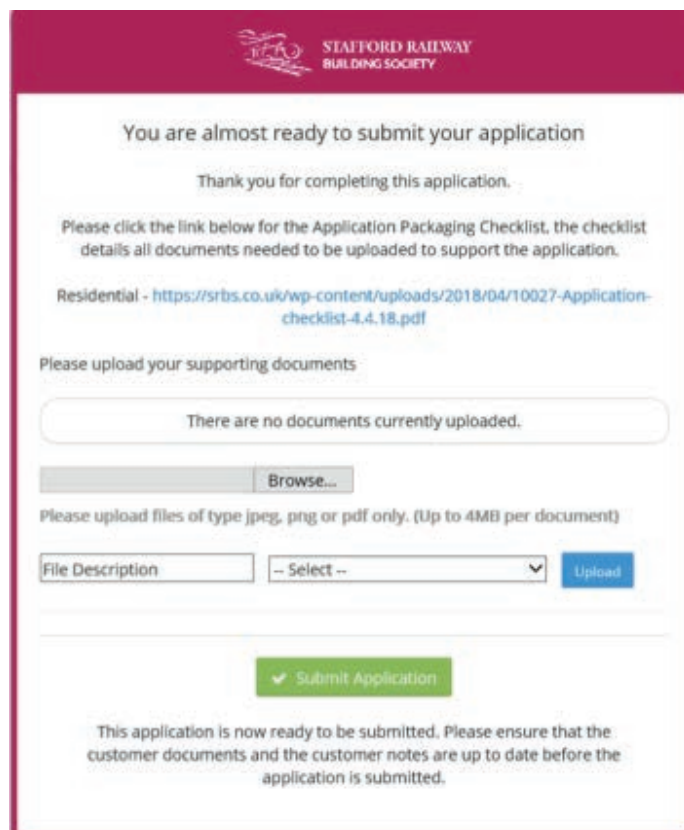
Sections highlighted in **Green** are where all questions have been answered and the application can be submitted.

If all mandatory questions have been completed you can then select

'Complete Application Form'.



The below message will now display. Please follow the link to see the supporting documents required. This page gives you the opportunity to upload any supporting documents (please make sure they are the correct file type such as jpeg, PNG, or PDF). Once you are happy with the document, insert a file description and document type from the dropdown box and then click **'Upload'**.



Note: If this is your first submission, you will be unable to use the **'Submit Application'** icon until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

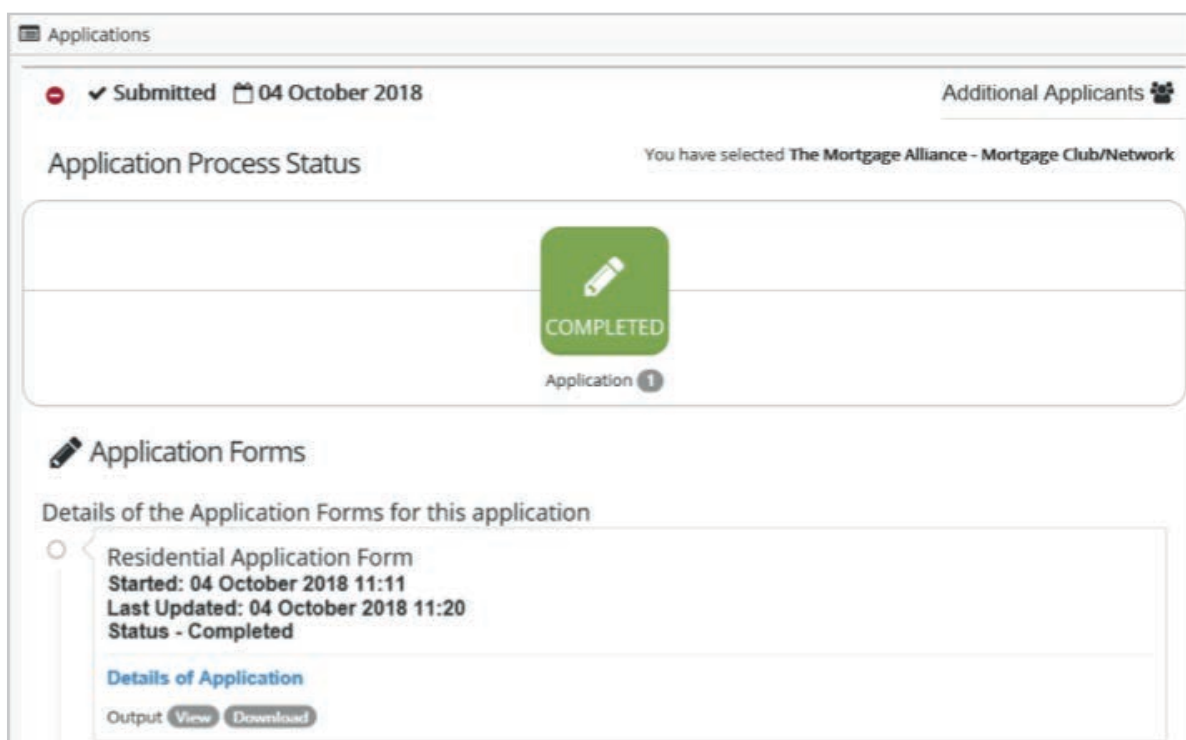
Please click anywhere on the shaded area of the screen to close the message.

7. Printing the Application

In order to print a submitted application you will need to access the relevant client. Then click the plus icon next to the **'Submitted'** icon in order to expand the field.



Select the **'Completed'** icon to show the **'Details of the Application'**.



You can then either click **'View'** the application on a web page ready to print or **'Download'** as a PDF which can be saved for your records.

Note: A signed declaration is needed before an Agreement in Principle can be issued. The Society also requires the original Direct Debit mandate.

8. Case Updates

As the application is processed by the Society you will be updated on how the case is progressing via the SRBS Mortgage Hub.

Case updates are split into the below categories and show a green tick once completed by the Society.



When an update is added to the portal you will receive an email advising you to login in.

In order to access the update select the relevant client by clicking on their name in the **'Your Clients'** section.

| Your Clients | | | | | | |
|---|-----------|---------|------------|--------------|-------------|-------------------------|
| + Create New Client <input type="text" value="Enter search criteria"/> 10 | | | | | | |
| | Forenames | Surname | D.O.B. | Phone | Loan Amount | Status |
| £ | Alan | Test | 01/01/1951 | 011111111111 | | Application Not Started |

Click the plus icon next to the **'Case Update'** icon in order expand the field.

| Applications | |
|----------------|---|
| + | Case Update - 22 October 2018 - £100,000.00 - SRDX-3yr discounted variable rate purchases-2.20% |

Click on one of the icons presented to locate what has been updated. Any stage with a green tick in the **'Completed'** section confirms this has been undertaken by the Society.

Any stage showing **'View'** in the Admin Document section means there is a communication from the Society waiting your attention. Click on **'View'** to open the document.

| Applications | | | |
|--|--------------------------|--------------------------|----------------|
| - Case Update - 22 October 2018 - £100,000.00 - SRDX-3yr discounted variable rate purchases-2.20% | | | |
| | | | |
| Description | Admin Document | Broker Document | Completed |
| BAIP - Approval in Principle | View | No Document | ✔ |
| VALI - Valuation Instructed | No Document | No Document | ✔ |
| VALR - Valuation Received | No Document | No Document | ✘ |
| NOTE - Noes Added Action Required | No Document | Upload | ✘ |

If you wish to upload any further documents to support the application, please use the **'Client Documents'** section, which is further down the screen. Click **'Save Client Details'** once all documents have been uploaded.

When a client's Mortgage Offer is issued, you will again be notified the case has been updated. You will then be able to log into the SRBS Mortgage Hub and view the document through the Case Updates.

Note: These documents will only be available to view until the mortgage completes, after which time any documents will no longer be available on the hub.

| Description | Admin Document | Broker Document | Completed |
|-----------------------------------|----------------------|------------------------|-----------|
| OFFER - Offer Issued | View | No Document | ✓ |
| NOTE - Noes Added Action Required | No Document | Upload | ✗ |

9. Super User

If you have been allocated Super User function by the Society you will have the below additional functions.

Once you have logged in you will see the **'Your Clients'** page, this is an overview of all cases in progress for your firm.

| Advisor | Forenames | Surname | D.O.B. | Email/Username | Phone | Loan Amount | Product Code | Other Applicants | Status |
|--------------|-----------|---------|------------|----------------|------------|-------------|---|------------------|--------|
| Laura Stacey | Alan | Test | 01/01/1951 | | 0123456789 | 100000 | SRL2-First time buyer low deposit-2.85% | Brenda Test | Active |
| Laura Stacey | Alan | Test | 01/01/1951 | | 0123456789 | | | Brenda Test | Active |
| Laura Stacey | James | Cooper | 02/10/1952 | | 0123456789 | 70000 | | | Active |
| Laura Stacey | Greg | Davies | 16/08/1971 | | 0123456789 | 100000 | RSVR-Standard variable rate Residential 3.45% | | Active |
| Laura Stacey | Jodie | Smith | 15/09/1984 | | 0123456789 | 50000 | RSVR-Standard variable rate Residential 3.45% | | Active |

Upload Documents-

If you wish to upload documents to an application, click on the clients name you wish to upload to.

Use the **'Client Documents'** section to upload and click **'Save Client Details'** when finished.

Click the **'Clients'** tab on the side menu to return to the **'Your Clients'** page.

| Document | Type | | |
|----------|---------------|----------------------|------------------------|
| Passport | FULL PASSPORT | Edit | Delete |

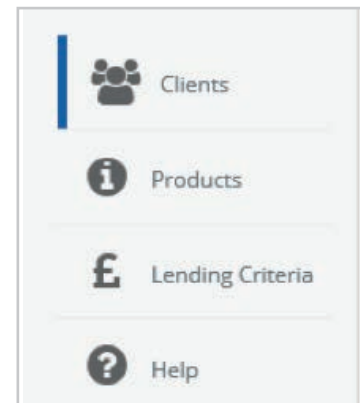
Browse...

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

File Description

-- Select -- [Upload](#)

[Save Client Details](#)



Broker Maintenance-

Super Users can use this feature to activate new advisors in their firm to allow them to submit cases to the Society. This feature also allows you to decline or suspend advisors.

In the top right corner of the screen click the below icon to take you to the **'Broker Maintenance'** page.

Use the drop down list under **'Status'** to change the advisor's permissions.

You can also use this feature to assign Super User status to other individuals with in your firm.



Status

Pending Awaiting Approval

- Active
- Suspended
- Deleted
- Declined
- Pending
- EmailNotConfirmed
- SuperUser

10. Frequently Asked Questions

Q. How do I register?

A. You can register to use The SRBS Mortgage Hub when you visit the site. This will allow you to register and create an application to ourselves. If you have not completed a full paper based registration form within the last 12 months, or your details have changed, we will require you to submit a new form to complete your registration with the Society before being able to submit an application, this can be obtained from the registration section of the Society's website.

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

A. Yes, documents can be uploaded during or after submitting the application to the Society. Please use the link below to display our document requirement list.

<https://srbs.co.uk/wp-content/uploads/2018/04/10027-Application-checklist-4.4.18.pdf>

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

A. Please contact our Mortgage Team on 01785 223 212, option 1 for Mortgages.

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.

Q. Who is my BDM?

A. Please contact either Stephen Breen (North) stephen.breen@srbs.co.uk or Emma Parker (South) emma.parker@srbs.co.uk for further information.

Q. How do I enter a foreign address when creating a client?

A. Please enter the clients country of residence in the 'Postcode' field, this will allow you to complete the rest of the address manually.

Q. Why have I not received your email?

A. Please check your Junk Mail to see if it has been placed in there. If the email still has not arrived please contact the Mortgage Team on 01785 223 212, option 1 for Mortgages.



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10. Frequently Asked Questions - cont'd.

Q. How to I amend or to add further information to an application once it has been submitted?

A. Please contact the Mortgage Team on 01785 223 212, option 1 for Mortgages. We will then re-activate the form so changes can be made.

Q. How do I get a KFI?

A. The Society currently does not provide KFIs for Intermediaries. The Society normally sources on Mortgage Brain, Trigold and 27Tech.

Q. How do I change my Firms/Network/Mortgage Club details?

A. Please contact the Mortgage Team on 01785 223 212, option 1 for Mortgages. We will then look to update your details for you.

Q. Where is the Society's Affordability Calculator?

A. Please click the link below for access:

<https://srbs.co.uk/intermediaries/mortgage-calculator/>

Q. What if I want to set up a Super User or an Admin User to my organisation?

A. Please contact the Mortgage Team on 01785 223 212, option 1 for Mortgages or brokers@srbs.co.uk. Once you have been set up with Super User access, then additional Super Users or Admin Users can be added.



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