



The Stafford

For Intermediaries



The Stafford
IntermediariesHub

User Guide



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1. Online Registration

1.a

In order to register online select the following hyperlink:

<https://intermediaries.srbs.co.uk/>

Then select **'Sign up now'** and then enter your email address and click **'Send verification code'**

The image shows two side-by-side screenshots of the SRBS registration process. The left screenshot is titled 'Sign Up' and includes a 'Cancel' button. It asks if the user has used MV Loans Origination before and provides a 'Send verification code' button. The email 'mortgages@srbs.co.uk' is entered in the input field. The right screenshot is titled 'Start your loans journey' and asks if the user has used MV Loans Origination before. It has input fields for 'Email Address' and 'Password', a 'Sign in' button, and a 'Sign up now' link. The SRBS logo and 'Powered by Mutual Vision' are at the bottom.

1.b

A verification code will be forwarded to the email address you have entered.

The image shows a screenshot of an email verification message. The subject is 'Verify your email address'. The body says 'Thanks for verifying your mortgages@srbs.co.uk account!' and 'Your code is: 249252'. It is signed 'Sincerely, Loans Origination'.

1.c

Enter the code into the **'Verification Code'** box and click on **'Verify Code'**.

The image shows a screenshot of the 'Sign Up' screen. It includes a 'Cancel' button and asks if the user has used MV Loans Origination before. The email 'mutual@srbs.co.uk' is entered in the input field. The verification code '771947' is entered in the 'Verification Code' box. The 'Verify code' button is highlighted.



1.d

Once your code is verified, please enter a password and click **'Create'**.

< Cancel


Sign Up

Used MV Loans Origination before?
You can sign in to your existing account used with another institution!

User Details

E-mail address verified. You can now continue.

Change e-mail

Create

1.e

You will then be required to authenticate this email address again by clicking on **'Send verification code'**. You will then receive another code to your registered email address.

Cancel

Two-Factor Authentication

User Details

Verification is necessary. Please click Send button.

Send verification code

Continue



1.f


Please enter the received code and click **'Verify code'**.

Cancel

Two-Factor Authentication

User Details

Verification code has been sent to your inbox.
Please copy it to the input box below.

1.g


Your E-mail address should be verified as you can click **'Continue' (update with new image)**

Cancel

Two-Factor Authentication

User Details

E-mail address verified. You can now continue.





1.h

You will then need to **'Create an account'**. Please enter your details and click **'Continue'**.

The Stafford
For Intermediaries

Create an account

Personal Details

Title
Mr

First Name
Anon

Surname
Test

Job Title
Business Development Manager

Mobile Number
0000000000

Please select your marketing preferences

By Phone

By Email

By Post

Continue

1.i

Click on **'Postcode lookup'** to find the address or you can enter this manually.

Company Details

Are you regulated by the FCA?

Yes No

FCA Number
15698236

Organisation Name
SRBS Mortgages

Trading As Name
The Stafford Mortgages

Use Postcode lookup

Property name
Property Name

Property number

Post code
st16 2jh Find

Select address
Please select

Please select an address from the list

Enter address manually



1.j

You can then choose your **'Mortgage Club'** and **'Mortgage Network'** you are associated with. You can enter more than one mortgage club

The screenshot shows a registration form with two main sections. The first section is titled 'Mortgage Club' and contains a multi-select dropdown menu with three items: 'Legal & General', 'The Mortgage Alliance', and 'Simply Biz'. The second section is titled 'Mortgage Network' and contains a single dropdown menu with the item 'Primis'. At the bottom right of the form is a blue button labeled 'Continue'.

1.k

You will then be able to check the details you have entered. You can edit any details if required. Click **'Register'** you are now registered and are able to start inputting a **'New Case'**.

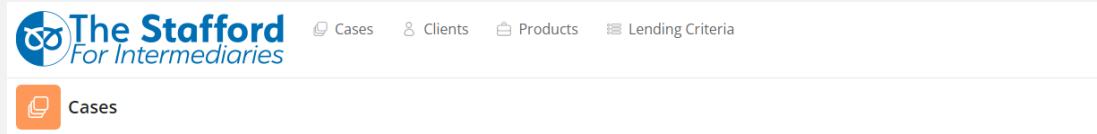
The screenshot shows a 'Create an account' summary page. At the top, there are three expandable sections: 'Personal Details', 'Company Details', and 'Summary'. Below these, the details are displayed in two columns. The 'Personal Details' column shows: 'Mr Anon Test', 'Business Development Manager', and '0000000000'. The 'Company Details' column shows: '15698236', 'The Stafford Mortgages', '4', 'MARKET SQUARE STAFFORD', and 'ST16 2JH'. Each column has an 'Edit' button with a pencil icon. At the bottom, there are two large buttons: a blue 'Register' button and a light blue 'Cancel' button.



2. Creating a Client

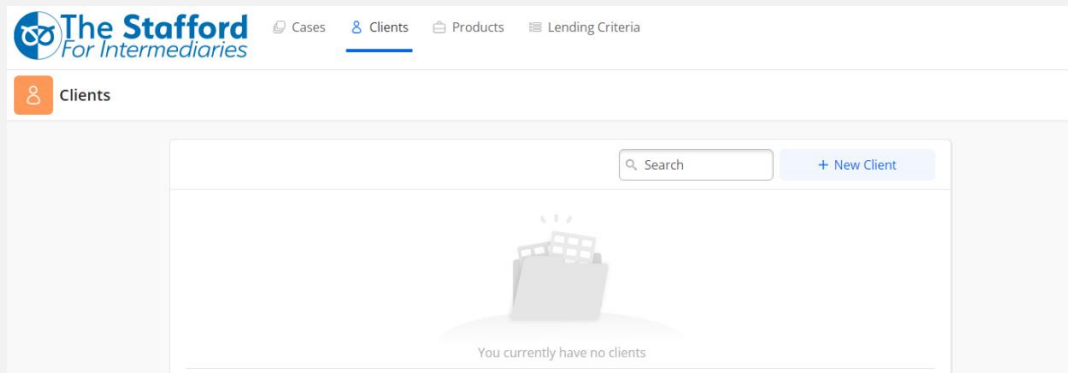
2.a

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



2.b

You will then be taken to the clients details screen. To add a new client click on **'+ New Client'**.



2.c

Enter all relevant details and then select **'Add client'**.

Add a new client [X]

Title
Please select [v]

First name
[]

Last name
[]

Date of birth
[DD] [MM] [YYYY]

Post code
[] [Find]

Enter address manually
[]

Email address
[]

Contact number
[]

[Add client] [Cancel]



2.d

When all the details have been entered you have now set up your client

The Stafford For Intermediaries Cases Clients Products Lending Criteria

Clients

Search + New Client

Title	First name	Last name	Date of birth	Email	Telephone	
Mr	Anew	Test	01/01/2001	xxxx.xxxx@sfrbs.co.uk	011111111111111	Edit

VC

Applicant
AT
Anew Test
STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD,
STAFFORDSHIRE, ST16 2JH

Documents
No Documents
+ Add document

Remove client

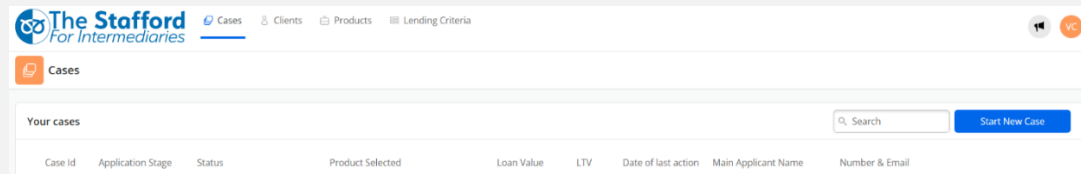




3. Creating an Application

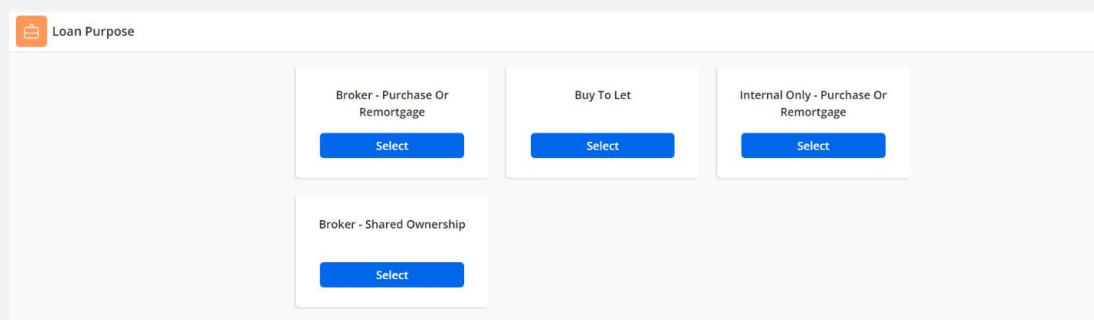
3.a

Once the client has been created, you can then create the application. In order to do this you need to select **'Start New Case'**.



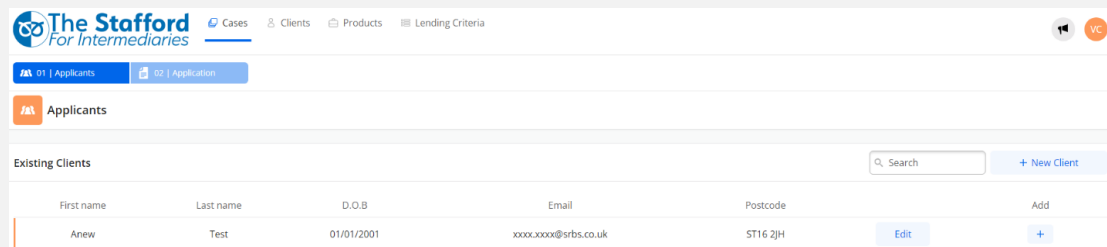
3.b

Add in the 'Loan Purpose Screen' when updated You will then need to select the loan purpose



3.c

You will then see a list of your clients 'Existing Clients'. To select the client you would like to add to the application click on **add '+'**.





3.d If the application is joint, you can add another client using the add button on another client

The screenshot shows the 'Existing Clients' section of the application. It features a search bar and a '+ New Client' button. Below is a table with columns for First name, Last name, D.O.B, Email, Postcode, and Add. Two clients are listed: Anon and Anew.

First name	Last name	D.O.B	Email	Postcode	Add
Anon	Test	01/01/2001	xxxx.xxx@srbcs.co.uk	ST16 2JH	Edit +
Anew	Test	01/01/2001	xxxx.xxxxx@srbcs.co.uk	ST16 2JH	Edit +

3.e After clicking **'Add'** this will move the client into **'Selected Clients'**. You can also choose who will be the main applicant if you are completing a 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 and click continue.

The screenshot shows the 'Selected Clients' section. It features a table with columns for First name, Last name, Main applicant, and Remove. Two clients are listed: Anon and Anew. The 'Main applicant' column has radio buttons, with Anon selected. Below the table is a 'Select a submission route' dropdown and a 'Continue >' button.

First name	Last name	Main applicant	Remove
Anon	Test	<input checked="" type="radio"/>	<input type="button" value="✕"/>
Anew	Test	<input type="radio"/>	<input type="button" value="✕"/>



4. Accessing a Partially Completed Application

- 4.a** Any application that has been partially completed will be saved at the point of moving to the next section of the application. Once you receive a **green tick** next to a section this is then automatically saved. You will only receive a green tick on a section once all the mandatory questions have been completed.

The screenshot shows the 'Application' page for 'Anew Test (Main Applicant)'. The left sidebar lists sections: 1. Personal Information, 1.1 Applicant Details (with a green tick), 1.2 Address Details, 2. Family & Employment Details, 3. Commitments & Expenditure, 4. Property & Loan Details, and 5. Solicitor, Valuation & Broker Details. The main content area is titled '1.2 Address Details' and contains a form with fields for 'Present Address', 'Use Postcode lookup', 'Property name' (filled with 'STAFFORD RAILWAY BLDG SOC'), and 'Property number' (filled with '4').

- 4.b** You can navigate out of the application and back to the main page by clicking on **'The Stafford for Intermediaries'** logo at anytime.

This screenshot is identical to the one in 4.a, showing the '1.2 Address Details' form. The 'The Stafford for Intermediaries' logo is visible in the top left corner of the page header.

- 4.c** You can access a partially completed application by simply selecting **'continue'** next to the case you wish to complete.

The screenshot shows the 'Cases' page with a table of 'Your cases'. The table has columns for Case Id, Application Stage, Status, Product Selected, Loan Value, LTV, Date of last action, Main Applicant Name, and Number & Email. A search bar and 'Start New Case' button are at the top right. The table contains one row for Case Id 3982, Application Stage 'Application', Status 'Active', Product Selected, Loan Value 0.00, LTV 0, Date of last action 23/04/2024, Main Applicant Name 'Anew Test', and Number & Email 'xxxxxxx@srbfs.co.uk'. There are 'Continue' and 'View' buttons at the end of the row.

Case Id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email
3982	Application	Active		0.00	0	23/04/2024	Anew Test	xxxxxxx@srbfs.co.uk



5. Application Submission

5.a Complete each section of the application form using the navigation buttons at the bottom of each page.

The screenshot shows a sidebar on the left with a dark blue background and the text 'Your Submission'. The main form area contains the following fields and options:

- County: STAFFORDSHIRE
- Post Code: ST16 2JH
- When did the applicant start living at this address?: DD, MM, YYYY
- Residential Status: Own Outright, Own Mortgaged, Rent, Live With Parents, Council Property, Other
- Has the applicant lived at this address for less than 3 years?: Yes, No
- Does this complete a full 3 years address history?: Yes, No

At the bottom of the form, there are two navigation buttons: '1.1 Applicant Details' and '2.1 Financial Dependents'.

5.b Or you can click on the left side navigation bar to a section you require.

The screenshot shows the application form with the left side navigation bar expanded. The '2.1 Financial Dependents' section is selected, and the main form area displays the following content:

- Section title: 2.1 Financial Dependents
- Text: If there are more than one financially dependant child or adult then use the add another section button.
- Form title: Anew Test (Main Applicant)
- Text: Does the applicant have any financial dependants?
- Text: If there are more than one financially dependant child or adult then use the add another button.
- Buttons: Yes, No

5.c In order to submit your application all sections including subsections must have been completed 'green tick'.

The screenshot shows the application form with the left side navigation bar expanded. All sections are marked with a green tick, indicating they have been completed. The main form area displays the following content:

- Section title: Confirm your submission?
- Text: You are about to submit this stage of the process. Please take a moment to review the details you have entered before progressing.
- Button: Submit Application

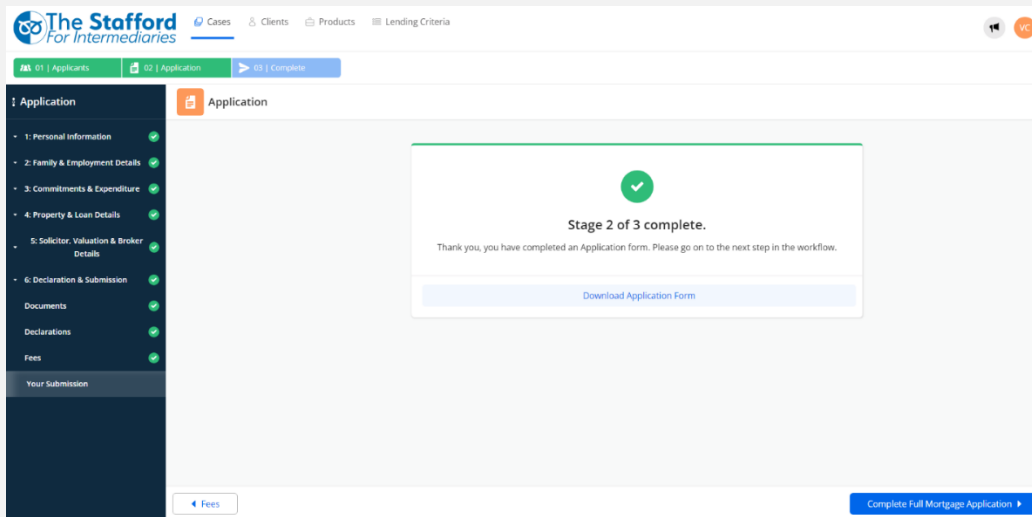


5.d Once all mandatory questions have been completed you can then select **'Submit Application'**.

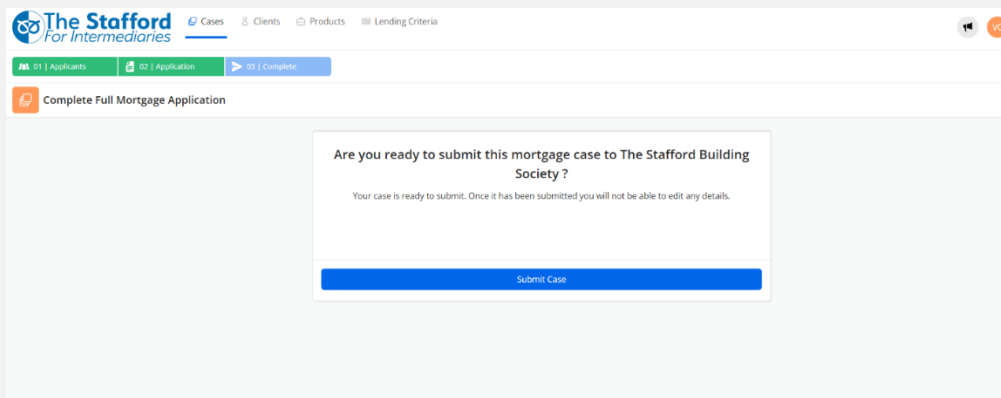
Note: If this is your first submission, you will be unable to use the 'Submit Application' button until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

In order to print/download the application as a PDF, please click on **'Download Application Form'**.

Then click on **'Complete Full Mortgage Application'**.



5.e Once you are ready to submit your application you will be presented with the below screen. Please be aware that you will be unable to make any changes to your application after you click **'Submit Case'**.





6. Case Updates

- 6.a As the application is processed by the Society you will be updated on how the case is progressing via the **'Case Tracking Screen'**. This screen can be accessed by clicking on **'Cases'** and then clicking on **'View'** against the case you wish to view.

The screenshot shows the 'Cases' page of The Stafford For Intermediaries. The page has a navigation bar with 'Cases', 'Clients', 'Products', and 'Lending Criteria'. Below the navigation bar, there is a search bar and a 'Start New Case' button. The main content is a table titled 'Your cases' with the following columns: Case Id, Application Stage, Status, Product Selected, Loan Value, LTV, Date of last action, Main Applicant Name, and Number & Email. The table contains five rows of data.

Case Id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email	
3985	Applicant	Active		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue View
3984	Applicant	Active		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue View
3983	Applicant	Active		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue View
3982	Application	Submitted	DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV	250,000.00	50	29/04/2024	Anew Test	xxxx.xxxx@srbs.co.uk	View
3981	Applicant	Cancelled		0.00	0	23/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	View





7. Uploading Documents

7.a You can upload supporting documentation whilst completing the application in the **'Documents'** section or you can upload documents once you have submitted the application from the **'Case Tracking'** screen. The file must be either a jpg/png/pdf file type and be less than 4MB in size.

Documents Section - You can click on **'Upload File'** and this will then ask to upload a file from your computer.

The screenshot displays the 'The Stafford For Intermediaries' application interface. The top navigation bar includes 'Cases', 'Clients', 'Products', and 'Lending Criteria'. The main content area is titled 'Documents' and shows a list of 'Documents Required' for 'Anew Test - Main Applicant'. The list is currently empty, displaying 'No existing client documents'. A blue 'Upload File' button is visible below the list. On the left, a sidebar menu shows the application progress: 01 | Applicants, 02 | Application, and 03 | Complete. The 'Documents' section is highlighted in the sidebar. Below the main content, there are links for '6.2 Mortgage Broker Declarations' and 'Declarations'. A modal window is open, showing a file upload interface with the text 'File to upload [Choose file] No file chosen' and a red warning: 'Please select a file of type jpg/png/pdf with a file size less than 4MB'. The modal includes a 'Category' dropdown menu (set to 'Please select'), a 'File Description' text input field, and 'Cancel' and 'Upload' buttons.



7.b

Click on **'Choose file'** this will take you to your files on your computer. Choose a file you wish to attach to the application and double click this will then insert the file name and then you can choose a **'Category'** from the drop down selection. Add a **'File Description'** for the file and click on **'Upload'**.

File to upload Intermediaries.png

Category
Passport

File Description
Passport for applicant A

Documents

Documents Required

Please upload supporting documentation:

Anew Test : Main Applicant

Category	Document Name	Delete	
Passport	Passport of applicant A	X	<input type="button" value="View"/>

7.c

Case Tracking Section - You can add documents to your submitted case whilst the case completes. To do this click on **'Add Document'**.

The Stafford For Intermediaries Cases Clients Products Lending Criteria

Case 3986 Completed
Anon Test - STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH

Applicants

Main Applicant: **Anon Test**
xxxx.xxx@srbbs.co.uk
000000000000
Passport

Case Tracking

Form	Status	Submission Date	Download
Application	Completed	29/04/2024	<input type="button" value="Download"/>

Notes
Type note...

Loan Details

Details

Organisation:	Stafford Railway Building Society
Address:	STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH
Purchase Price:	£ 200,000.00
Loan Amount:	£ 100,000.00
Mortgage Term:	25
Product Code:	DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV
Purpose of Loan:	Residential



8. Sending and Receiving a Note

- 8.a** You can send and receive notes to and from the Society. You can type a note to the society in the **'Case Tracking'** section.

The screenshot displays the 'Case Tracking' interface for Case 3986. The 'Applicants' sidebar lists 'Anon Test' with contact details. The 'Case Tracking' section features a progress bar with tabs for Application, Registration, Offers, and Completion. The 'Application' tab is selected, showing a table with the following data:

Form	Status	Submission Date	Download
Application	Completed	29/04/2024	Download

The 'Loan Details' section provides the following information:

- Organisation: Stafford Railway Building Society
- Address: STAFFORD RAILWAY BLDG SOC., 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH
- Purchase Price: £ 200,000.00
- Loan Amount: £ 100,000.00
- Mortgage Term: 25
- Product Code: DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV
- Purpose of Loan: Residential

- 8.b** The Society will also send notes to you. You will receive an automated email to your registered email address asking you to log in to the portal to view the note. The note can be viewed in the **'Case Tracking'** section.

The screenshot shows the 'Case Tracking' interface with a note received from The Stafford Building Society. The note content is:

The Stafford Building Society
Test note received from The Stafford Building Society
07 May 2024 11:53



9. Online Registration - Following the forgotten password process

9.a

Click on 'Forgot your password?'

Start your loans journey

Used MV Loans Origination before?
You can sign in to your existing account used with another institution!


Email Address

Password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)



9.b

Enter your email address and click 'Send verification code'


[← Cancel](#)

Reset your password

Email Address

Send verification code

Continue



9.c

You will then be sent a verification code to the email address entered

Verify your email address

Thanks for verifying your vicki3550@sky.com account!

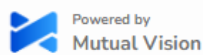
Your code is: 640397

Sincerely,
Loans Origination



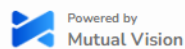
9.d

Please enter this code in the box provided and click on 'Verify code'



9.e

This now confirms you have 'Reset your password' You now need to log into the system by clicking on 'Continue'



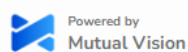
9.f

This now requires you to log into the platform the using your new details. Re type in your email address and click 'Send verification code'.

< Cancel

Two-Factor Authentication

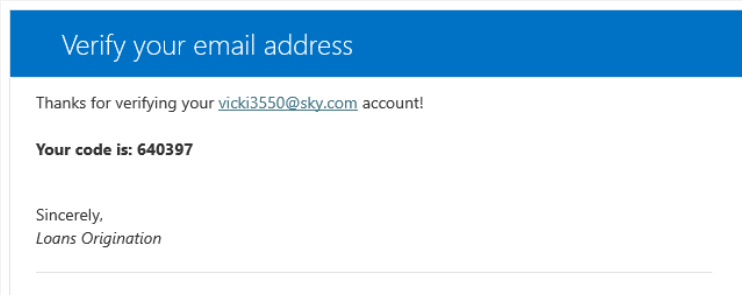
Verification is necessary. Please click Send button.





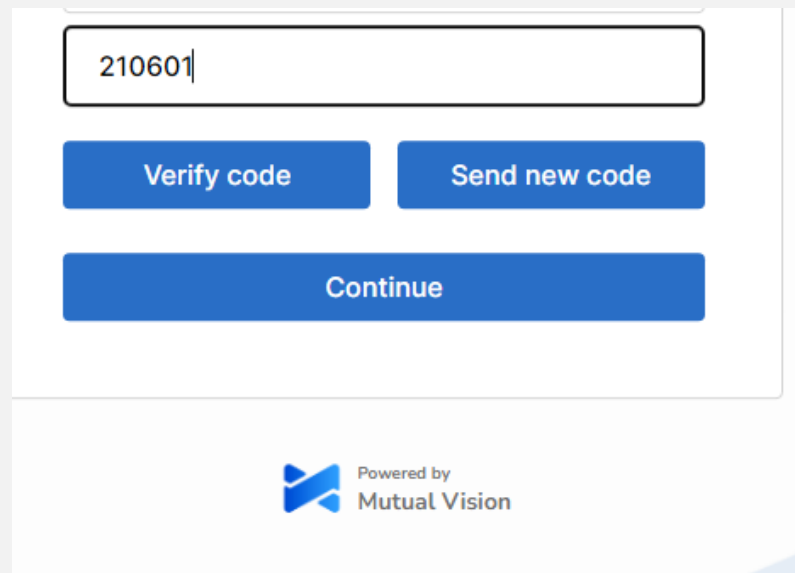
9.g

You will then be sent another verification code to the email address entered



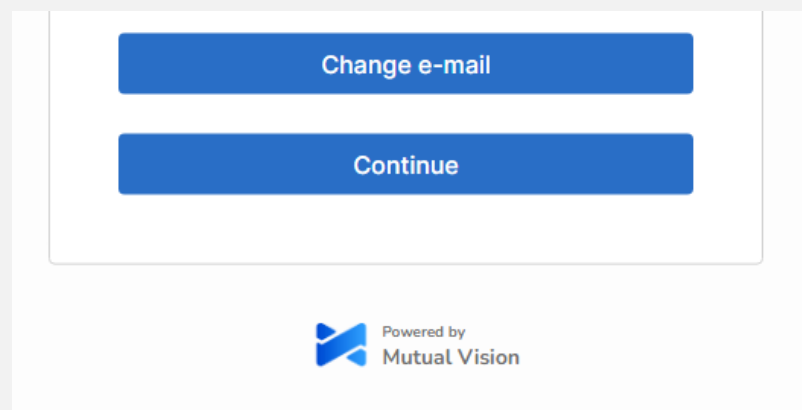
9.h

Please enter this code in the box provided and click on 'Verify code'



9.i

This now confirms you have 'Email address has been verified' You now need to log into the system by clicking on 'Continue'






9.j

You will now be asked to 'Reset your password'. Please enter your 'New Password' and 'Confirm New Password' and click continue.

< Cancel

Reset your password

Continue

 Powered by
Mutual Vision

You will now be required to log into the system.



10. Frequently asked Questions

How do I register?	You can register to use The Stafford Intermediary 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 which can be found here: srbs.co.uk/intermediaries/downloads
Can I submit an application form where I don't have all the supporting documents	Yes, documents can be uploaded during or after submitting the application to the Society.
What should I do if I've forgotten my password?	Simply click on 'forgot password' on the login screen. To help you please view section 9 of this document.
What if I am part way through keying the application and I must log out, will all my work be lost?	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.
Who is my BDM?	Please contact our National Account Manager, Emma Parker (07506906525, Emma.Parker@srbs.co.uk) .
How do I enter a foreign address when creating a client?	Please enter the clients country of residence in the 'Postcode' field, this will allow you to complete the rest of the address manually
Why have I not received your email verification?	Please check your Junk Mail to see if it has been placed in there. If the email still has not arrived please click on send new code.
How do I amend or to add further information to an application once it has been submitted?	Please contact the Mortgage Help Desk on 01785 231 444 . We will then re-activate the form so changes can be made
How do I get a KFI?	The Society currently does not provide KFIs for Intermediaries. The Society normally sources on Mortgage Brain, Trigold and 27Tech.
How do I change my Firms/Network/Mortgage Club details?	Please contact the Mortgage Help Desk on 01785 231 444 . We will then look to update your details for you.