The Stafford
For Intermediaries

The Stafford IntermediariesHub

User Guide

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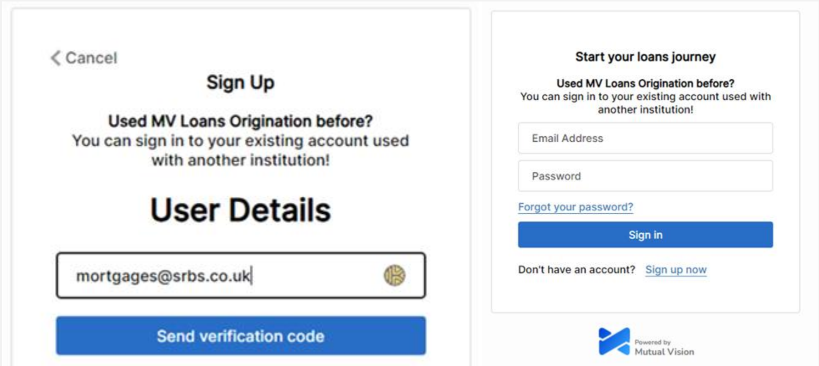
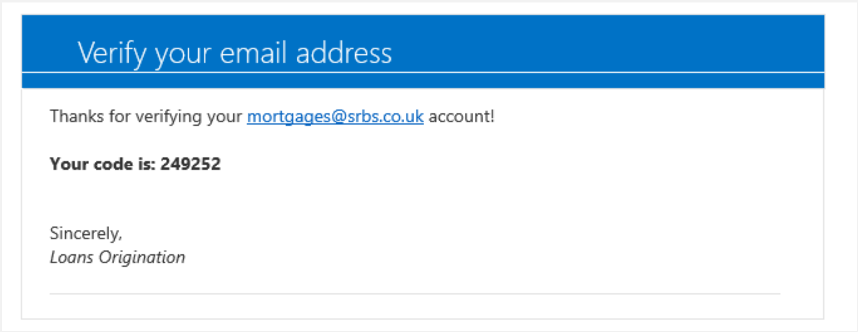
1. Online Registration

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

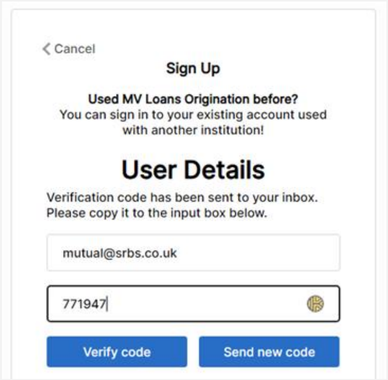
Then select **'Sign up now'** and then enter your email address and click **'Send verification code'**



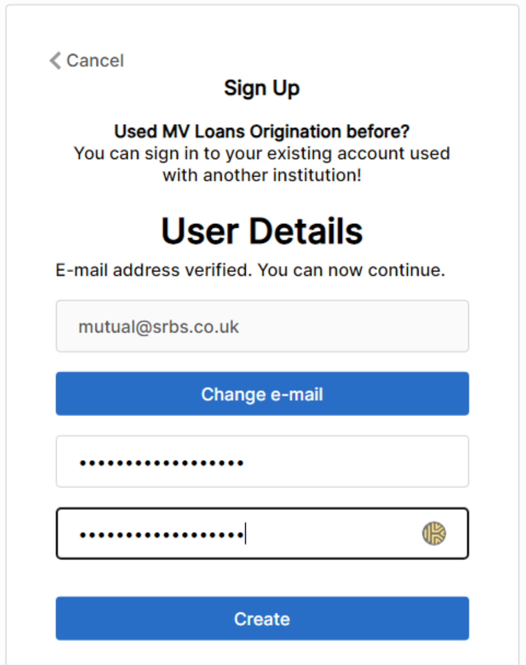
1.b A verification code will be forwarded to the email address you have entered.



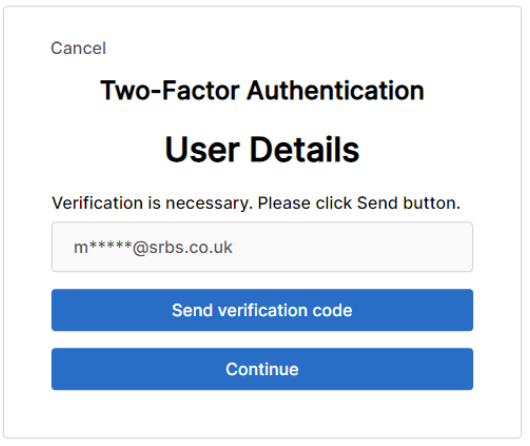
1.c Enter the code into the **'Verification Code'** box and click on **'Verify Code'**.



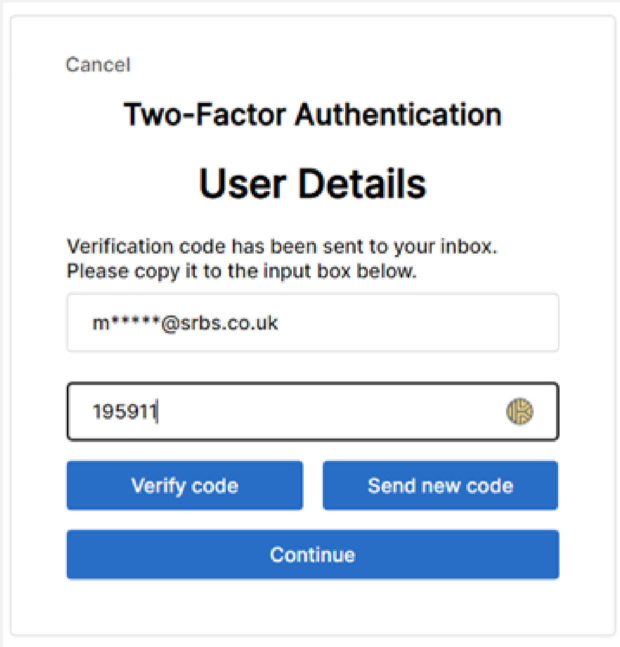
1.d Once your code is verified, please enter a password and click **'Create'.**



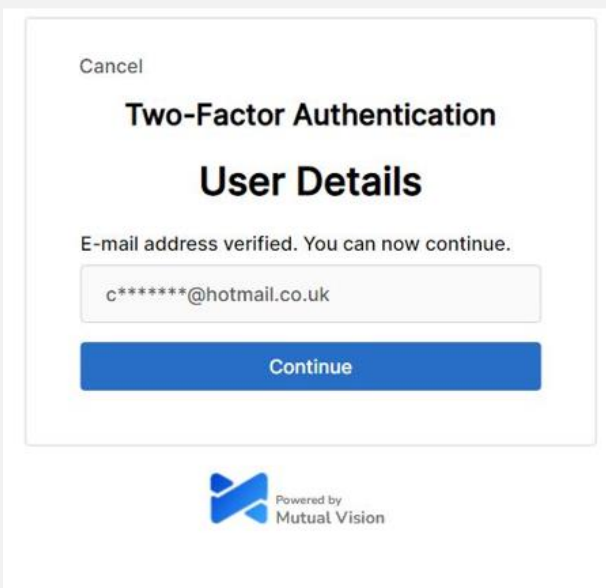
1.e You will then be required to authenicate this email address again by clicking on **'Send verification code'**. You will then receive another code to your registered email address.



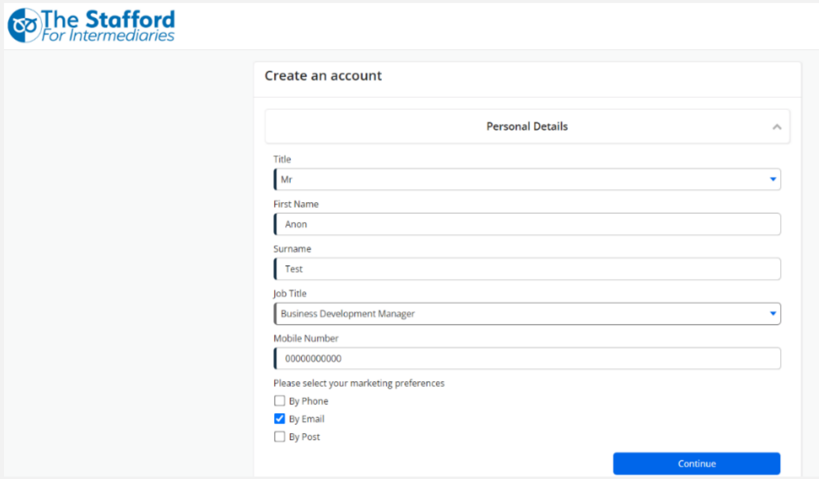
1.f Please enter the received code and click **'Verify code'**.



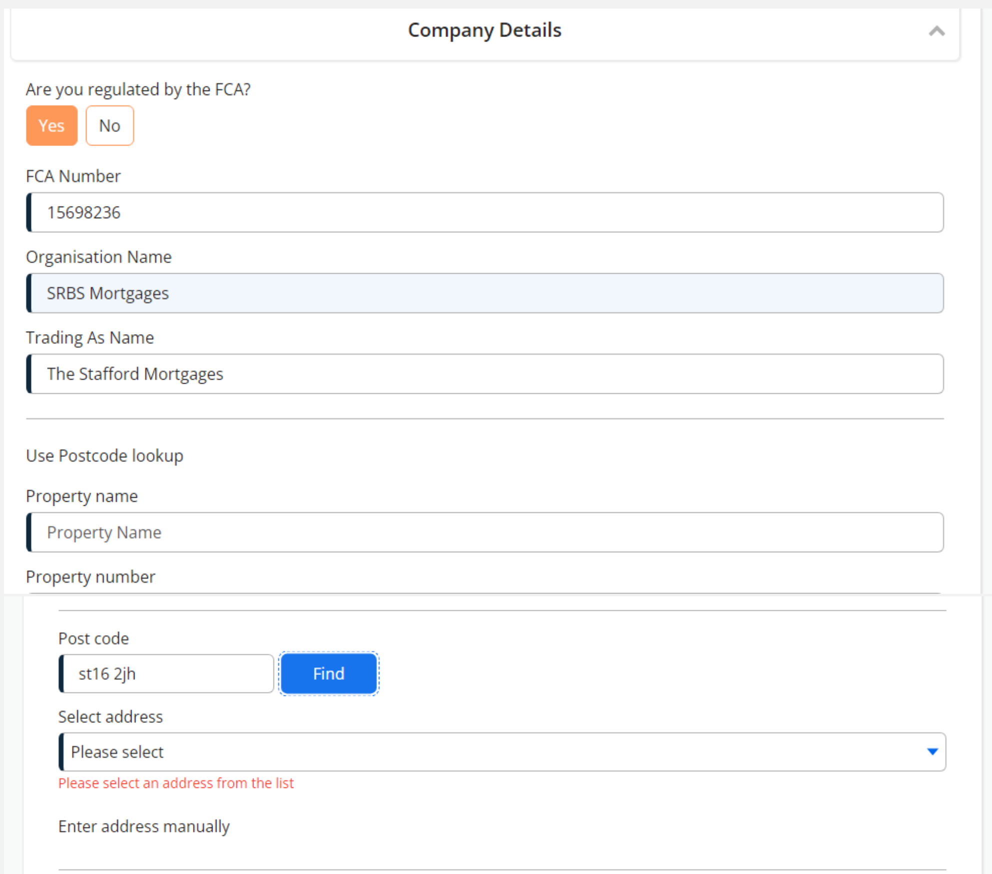
1.g Your E-mail address should be verified an you can click **'Continue' (update with new image)**



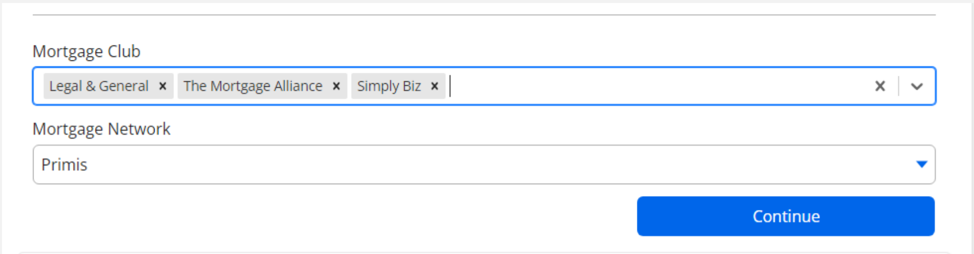
1.h	You will then need to **'Create an account'**. Please enter your details and click **'Continue'.**



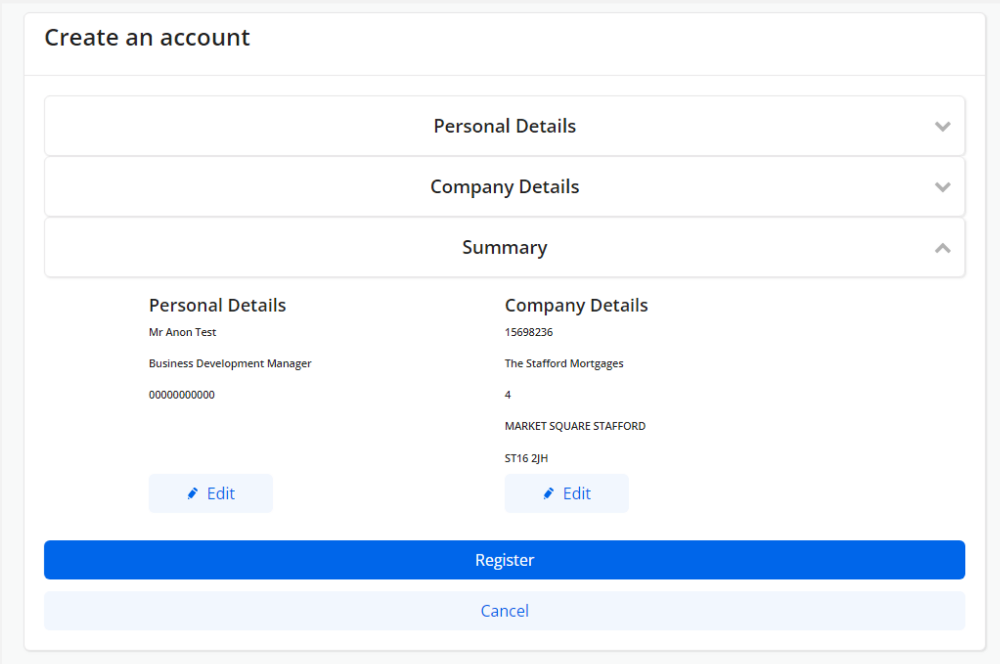
1.i	Click on **'Postcode lookup'** to find the address or you can enter this manually.



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

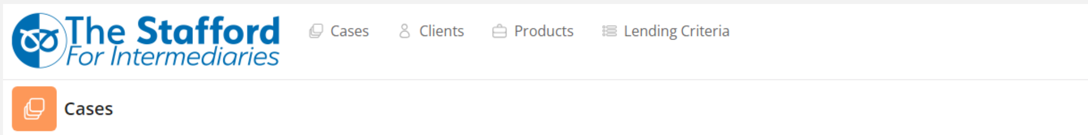


1.k You will then be able to check the details you have entered. You can edit any details if required. Click **'Register'** you are now registered and are able to start inputing a **'New Case'**.

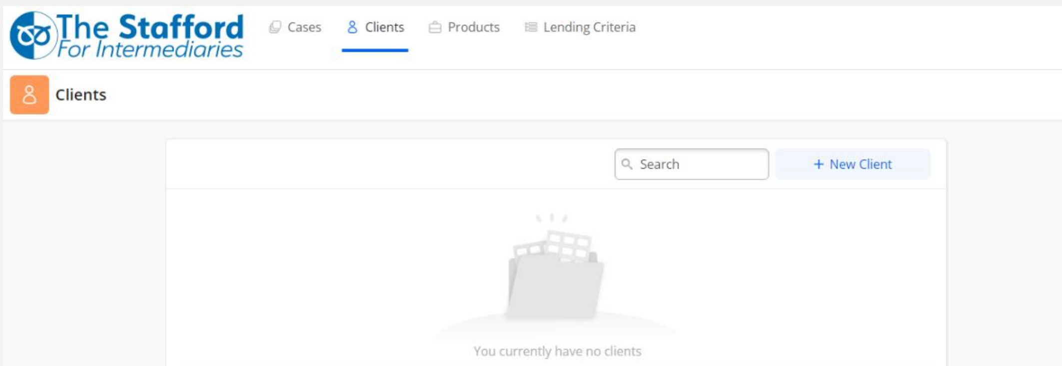


2. Creating a Client

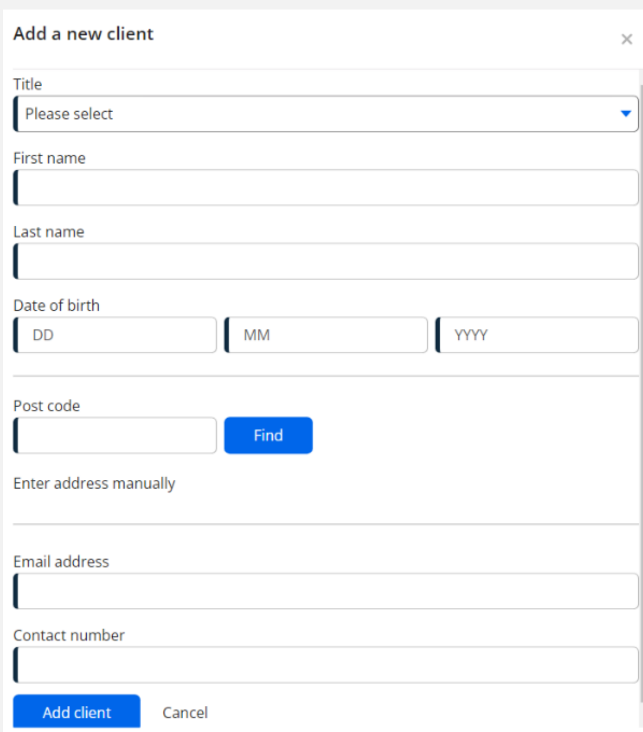
2.a Once logged in, the first page you will see is **'Your cases'**. This will display a list of your current and previous cases. In order to create a new client select **'Clients'**.



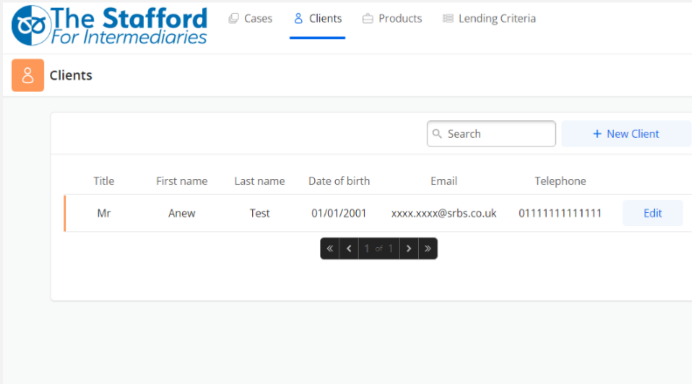
2.b You will then be taken to the clients details screen. To add a new client click on **'+ New Client'**.

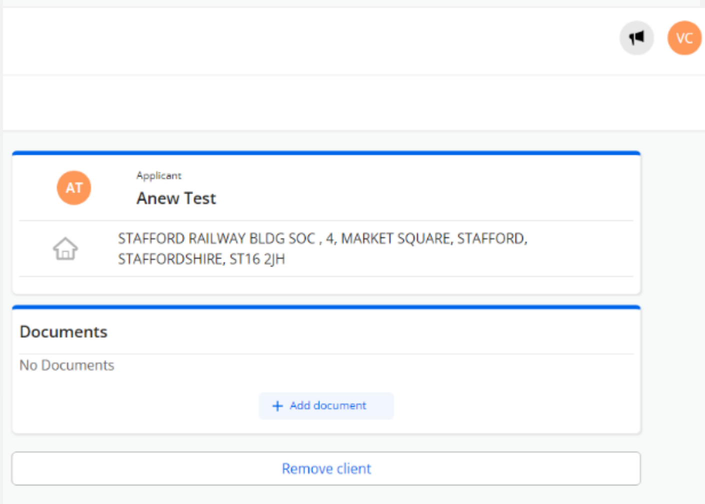


2.c Enter all relevant details and then select **'Add client'**.



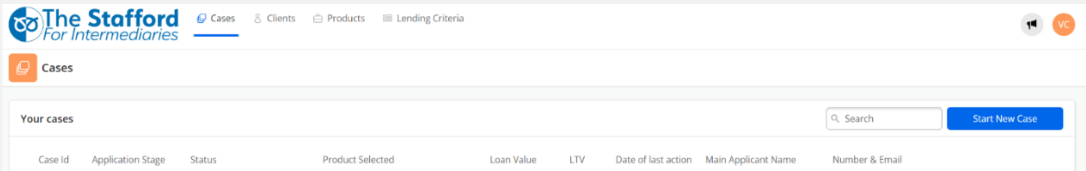
2.d When all the details have been entered you have now set up your client



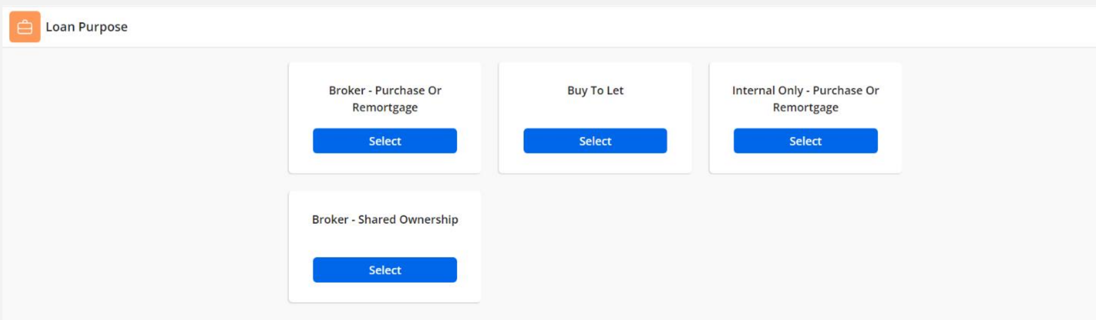


3. *Creating an Application*

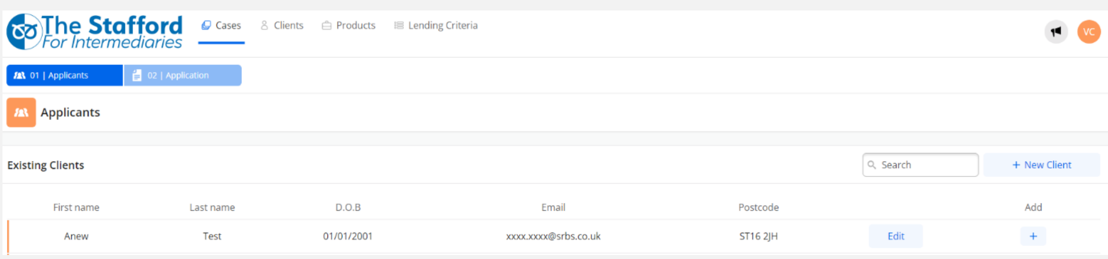
3.a Once the client has been created, you can then create the application. In order to do this you need to select **'Start New Case'**.



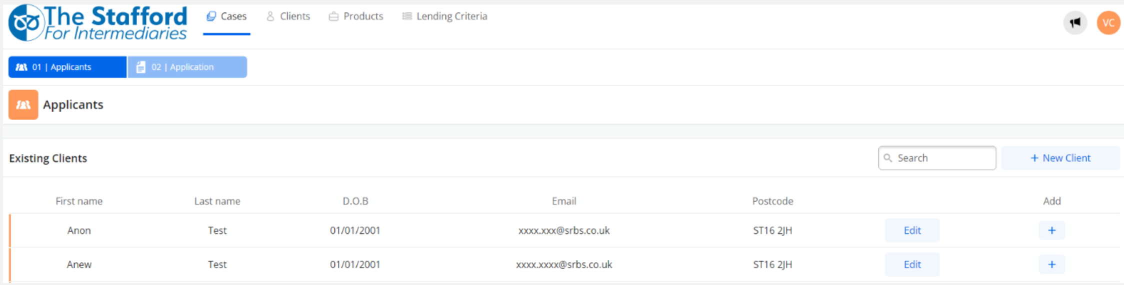
3.b Add in the 'Loan Purpose Screen' when updated You will then need to select the loan purpose



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 '+'**.

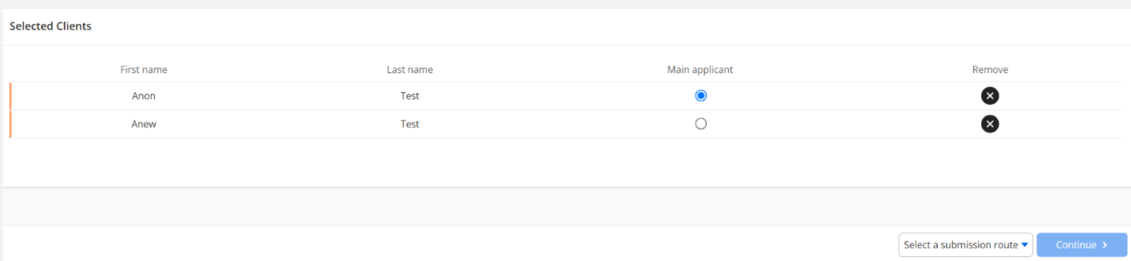


3.d If the application is joint, you can add another client using the add button on another client



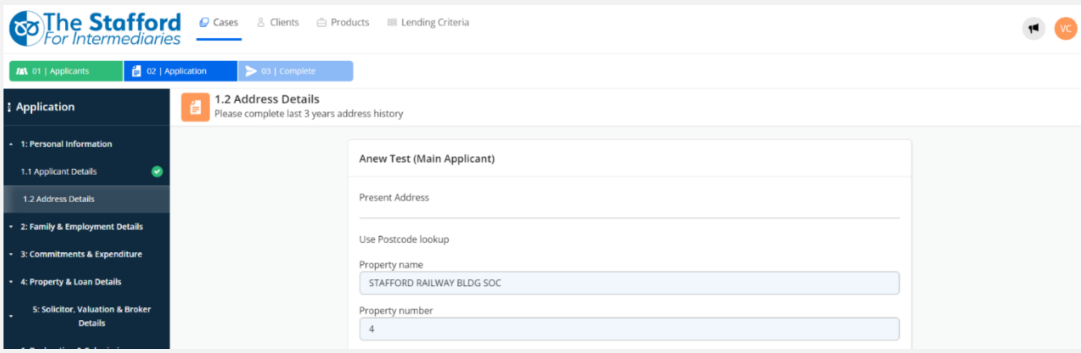
3.e After clicking **'Add'** this will move the client into **'Selected Clients'**. You can also choose who will be the main applicant if you are completing a joint application.

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.

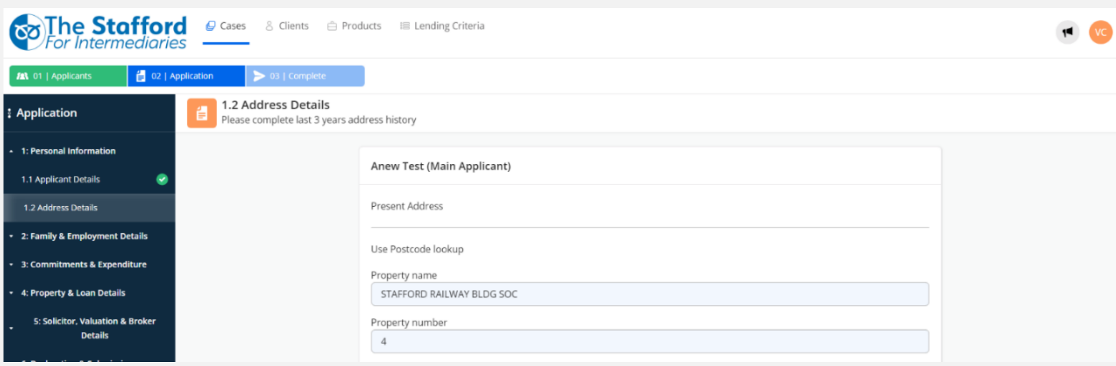


4. *Accessing a Partially Completed Application*

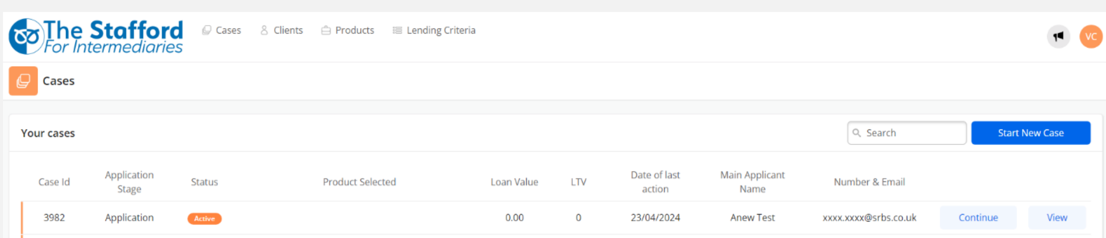
4.a Any application that has been partially completed will be saved at the point of moving to the next section of the application. Once you receive a **green tick** next to a section this is then automatically saved. You will only receive a green tick on a section once all the mandatory questions have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



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.

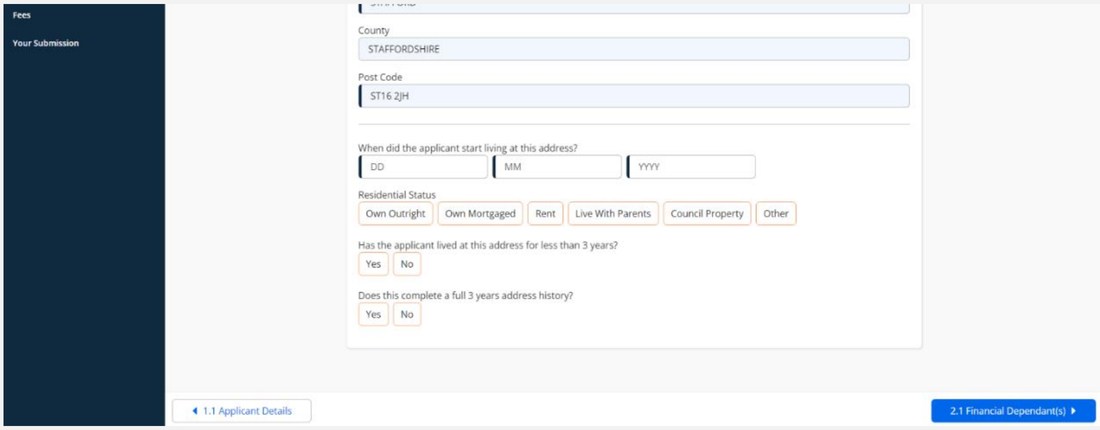


4.c You can access a partially completed application by simply selecting **'continue'** next to the case you wish to complete.

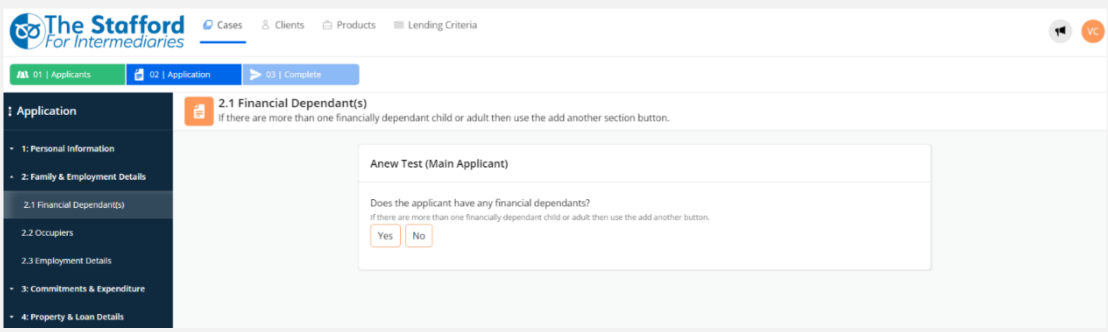


5. Application Submission

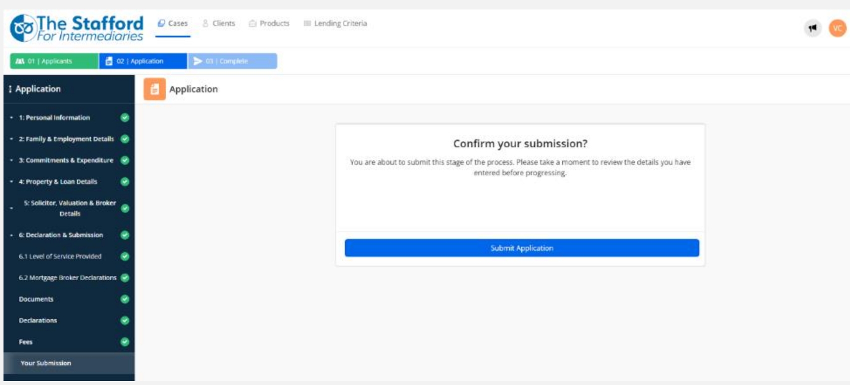
5.a Complete each section of the application form using the navigation buttons at the bottom of each page.



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



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

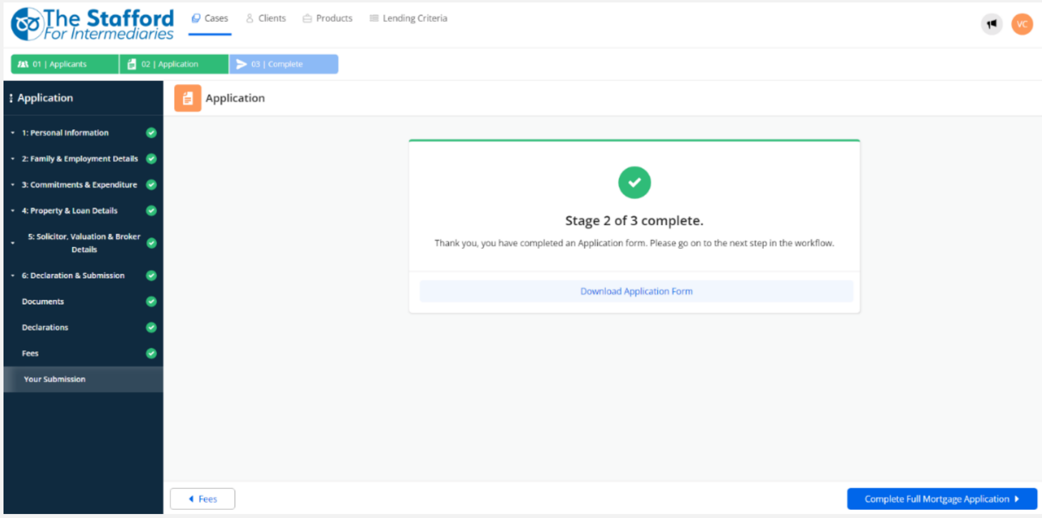


5.d Once all mandatory questions have been completed you can then select **'Submit Application'**.

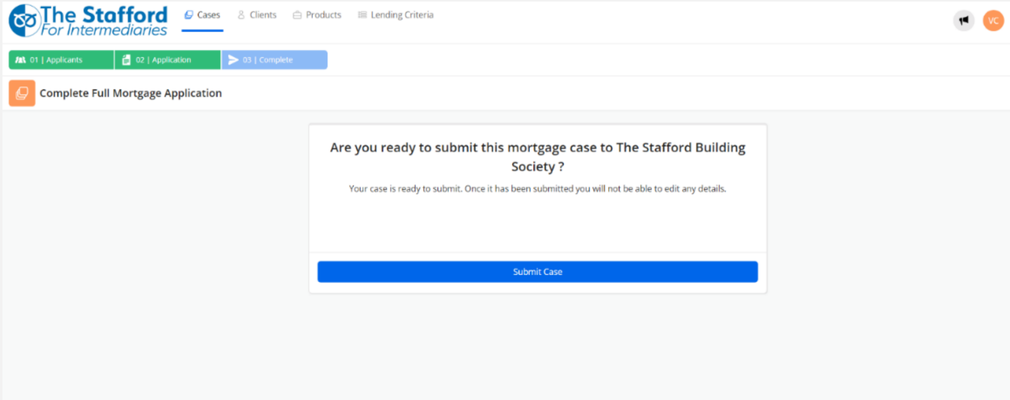
Note: If this is your first submission, you will be unable to use the 'Submit Application' button until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

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

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

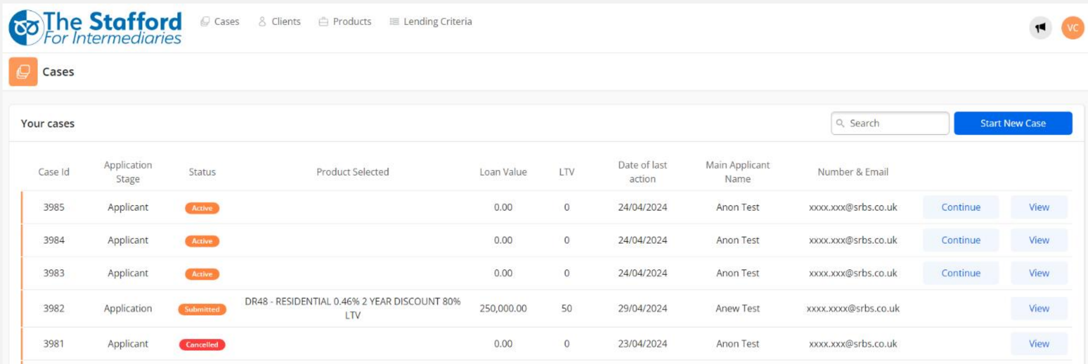


5.e Once you are ready to submit your application you will be presented with the below screen. Please be aware that you will be unable to make any changes to your application after you click **'Submit Case'**.



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 sceen can be accessed by clicking on **'Cases'** and then clicking on **'View'** against the case you wish to view.


The Stafford For Intermediaries Cases Clients Products Lending Criteria VC

Cases

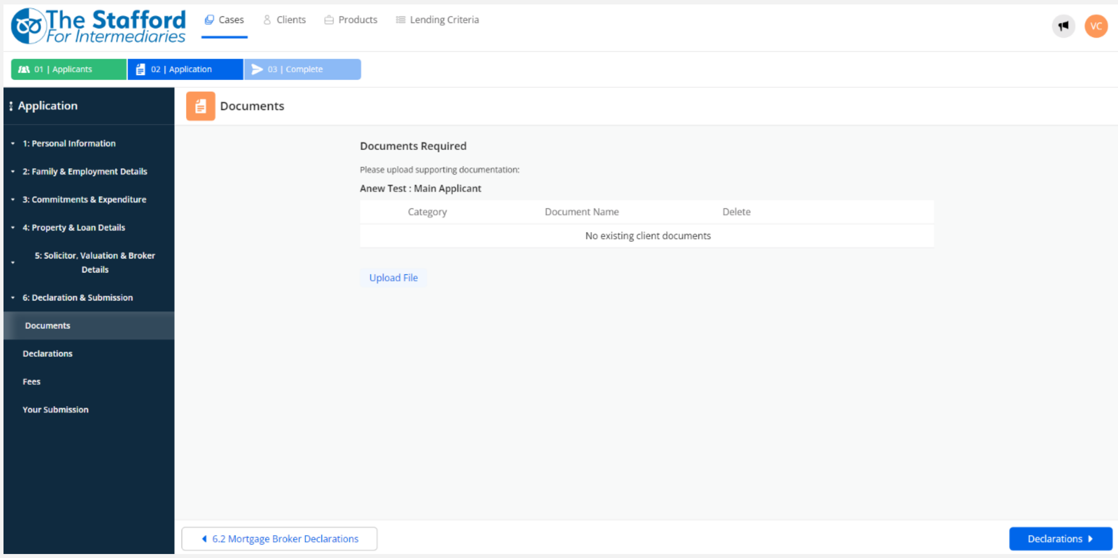
Your cases Search Start New Case

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.xxx@srbs.co.uk	Continue	View
3984	Applicant	Active		0.00	0	24/04/2024	Anon Test	xxxx.xxx@srbs.co.uk	Continue	View
3983	Applicant	Active		0.00	0	24/04/2024	Anon Test	xxxx.xxx@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.xxx@srbs.co.uk		View

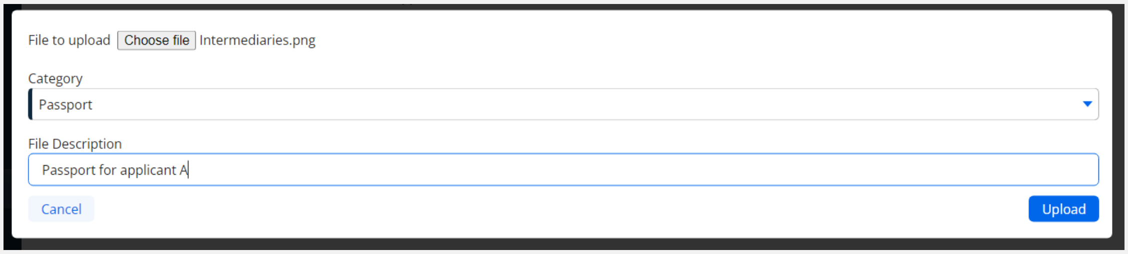
7. Uploading Documents

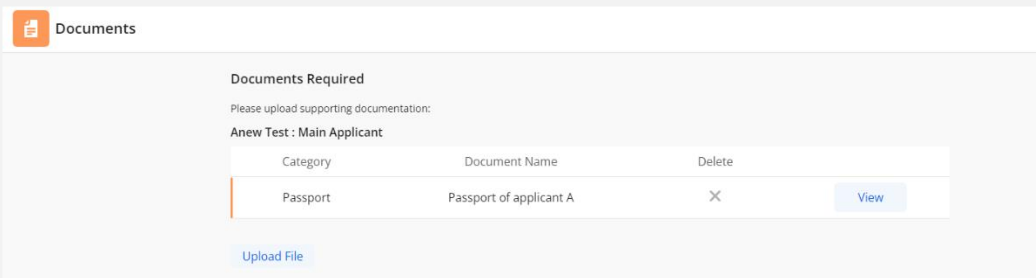
7.a You can upload supporting documentation whilst completing the application in the **'Documents'** section or you can upload documents once you have submitted the application from the **'Case Tracking'** screen. The file must be either a jpg/png/pdf file type and be less than 4MB in size.

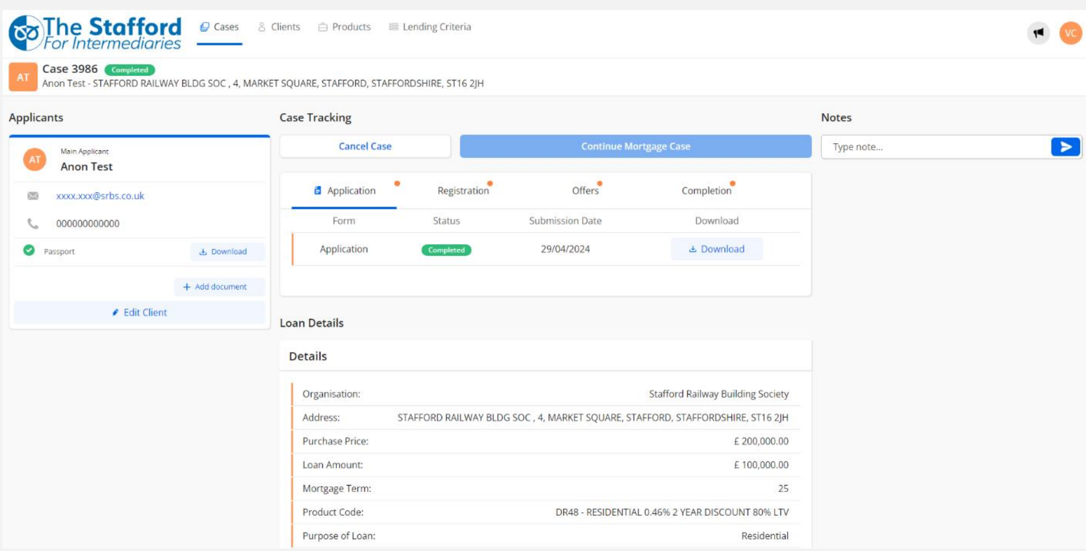
Documents Section - You can click on **'Upload File'** and this will then ask to upload a file from your computer.



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

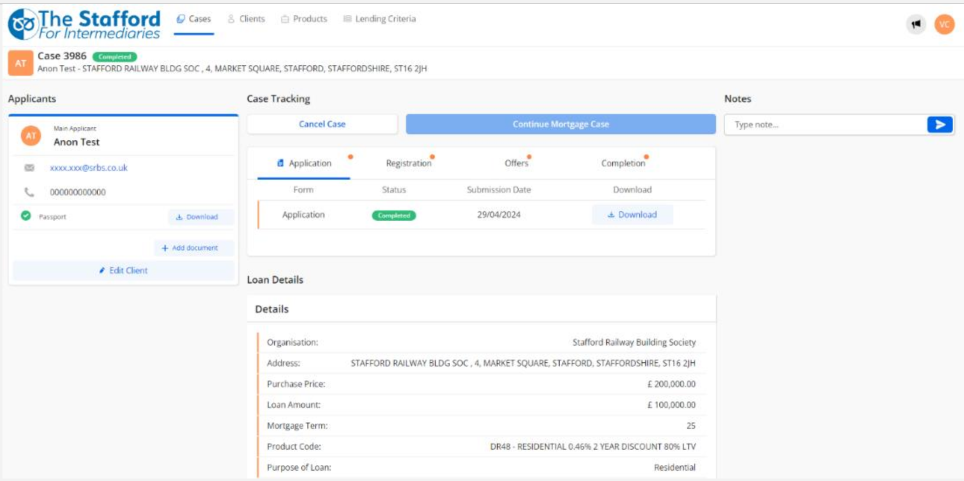




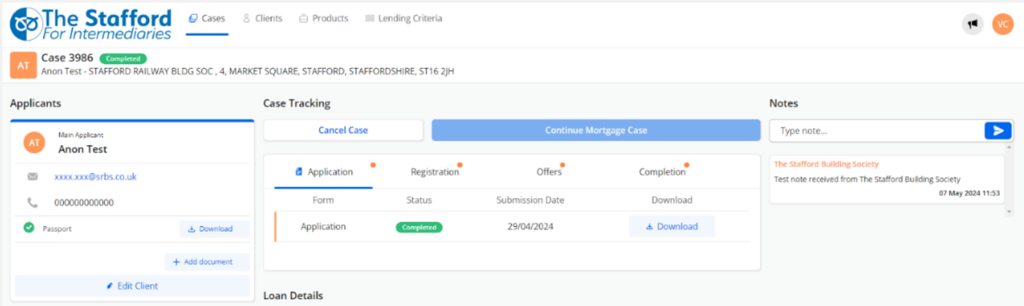


8. Sending and Receiving a Note

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.

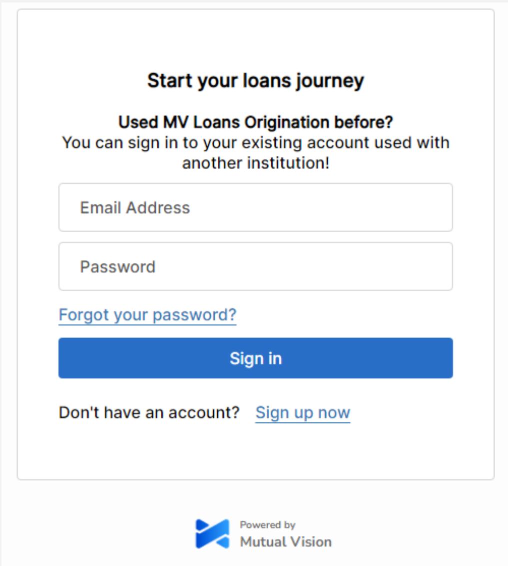


8.b The Society will also send notes to you. You will receive an automated email to your registered email address asking you to log in to the portal to view the note. The note can be viewed in the **'Case Tracking'** section.

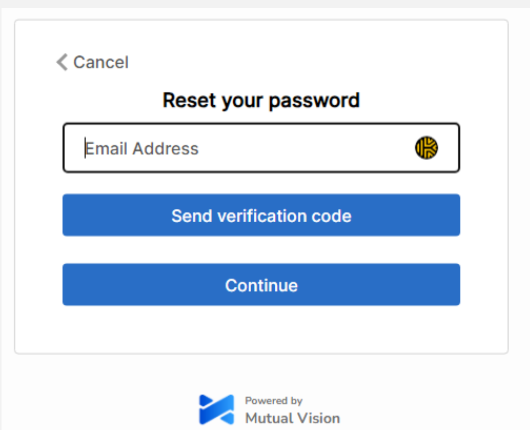


9. *Online Registration – Following the forgotten password process*

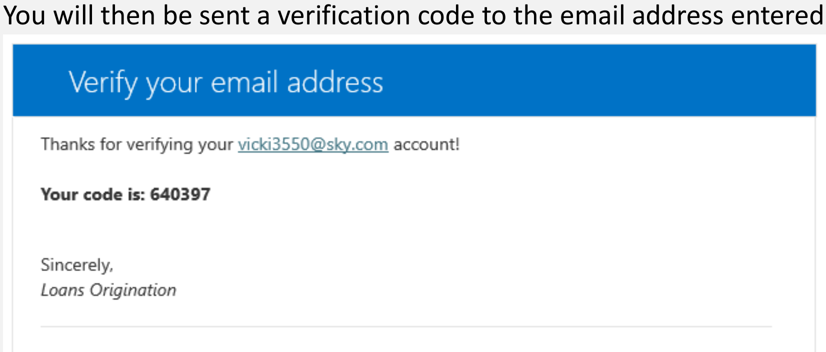
9.a Click on ‘Forgot your password?’



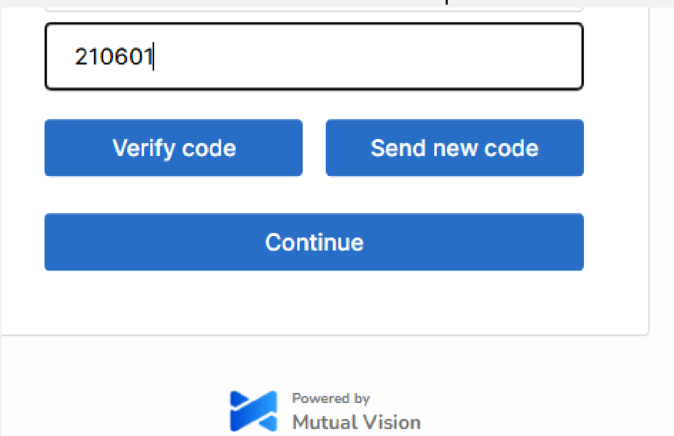
9.b Enter your email address and click ‘Send verification code’



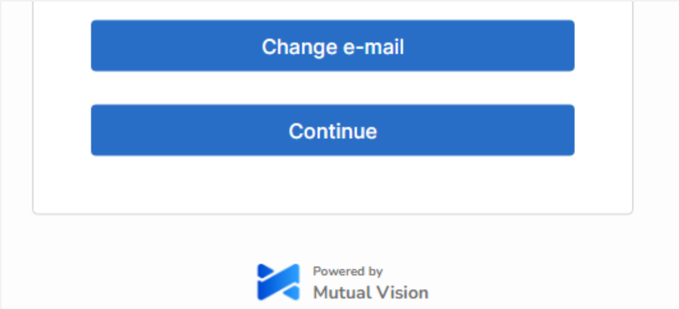
9.c You will then be sent a verification code to the email address entered



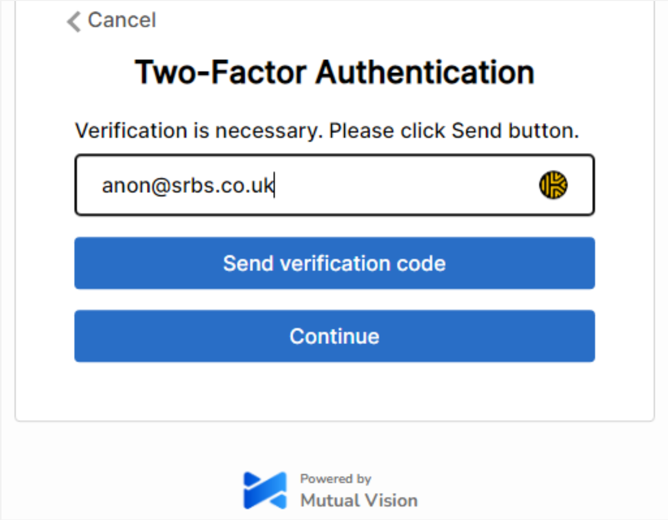
9.d Please enter this code in the box provided and click on 'Verify code'



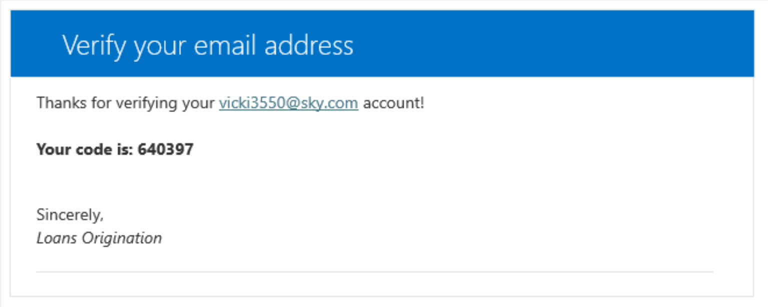
9.e This now confirms you have 'Reset your password' You now need to log into the system by clicking on 'Continue'



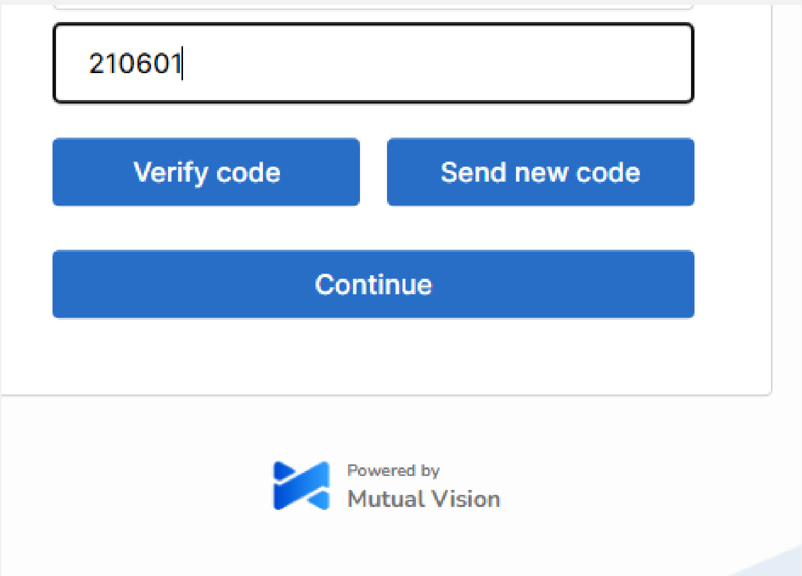
9.f This now requires you to log into the platform the using your new details. Re type in your email address and click 'Send verification code'.



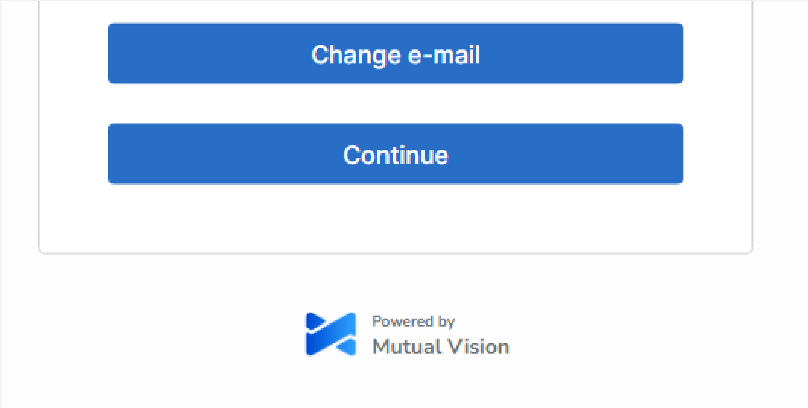
9.g You will then be sent another verification code to the email address entered



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

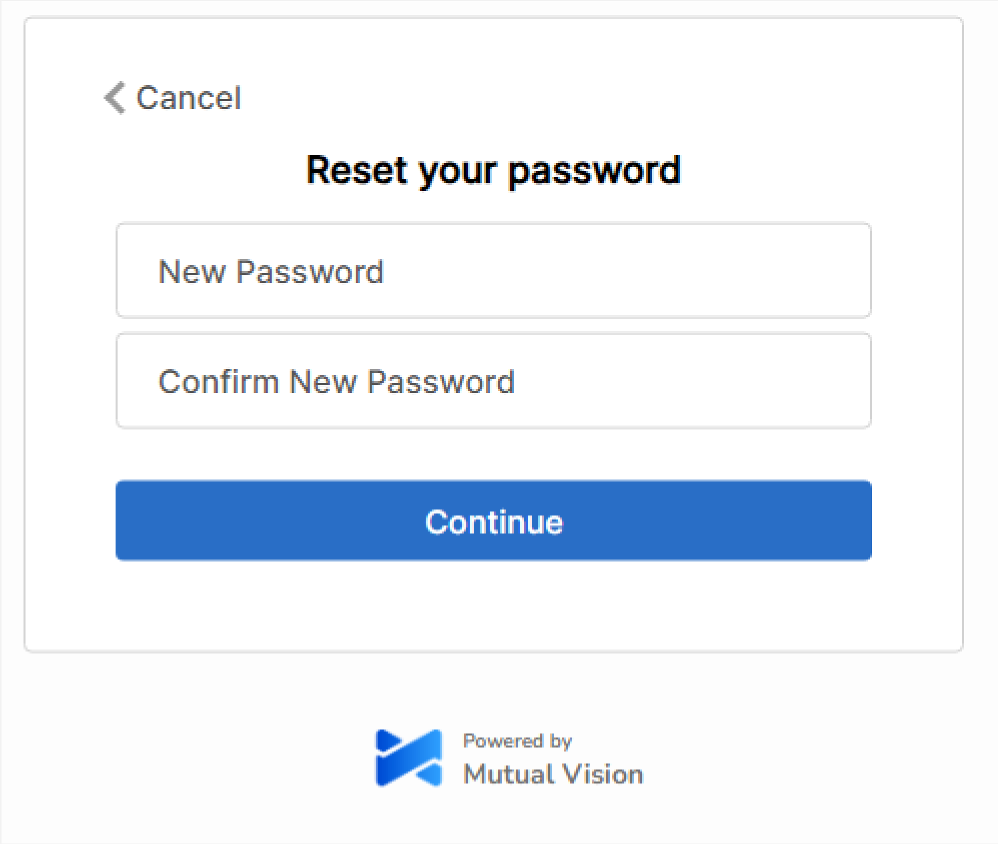


9.i This now confirms you have 'Email address has been verified' You now need to log into the system by clicking on 'Continue'



9.j

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



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 place in there. If the email still has not arrived please click on send new code.
How to 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.