Leek United Building Society Online Broker System

The Easy Way to submit a Mortgage Application.

Contents

1. Logging in

1.1   Browser Settings

Please note in order to access the system you will require Internet Explorer 11 (IE11) or alternatively Google Chrome.
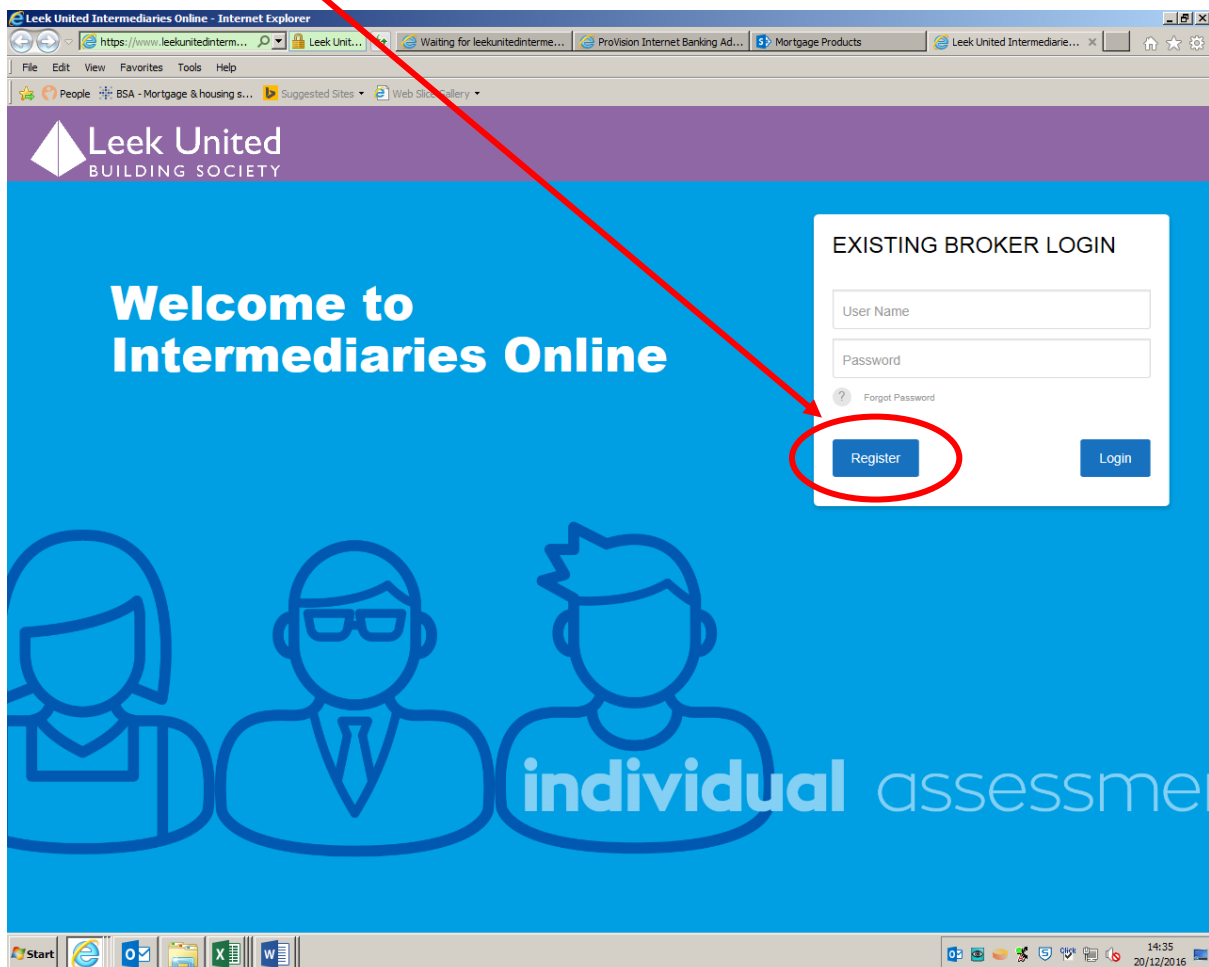
To check your browser settings select ⚙ in the top right corner and About Internet Explorer. You may need to update your internet browser if you are on a version prior to IE11.
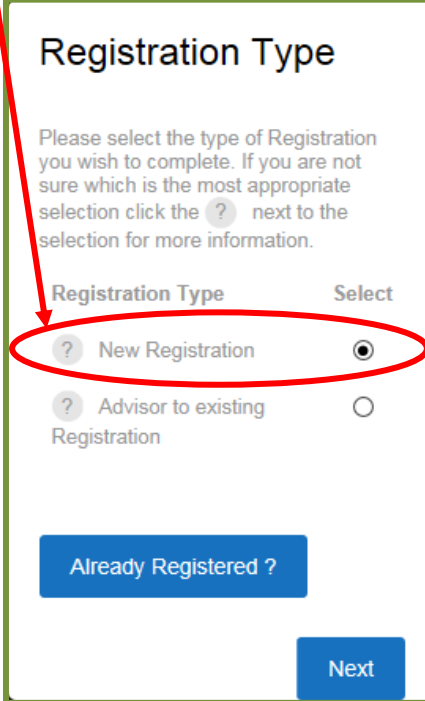
1.2   Online Registration

In order to register online select the following hyperlink:
https://www.leekunitedintermediaries.co.uk/Account/Login?ReturnUrl=%2f

Then select Register

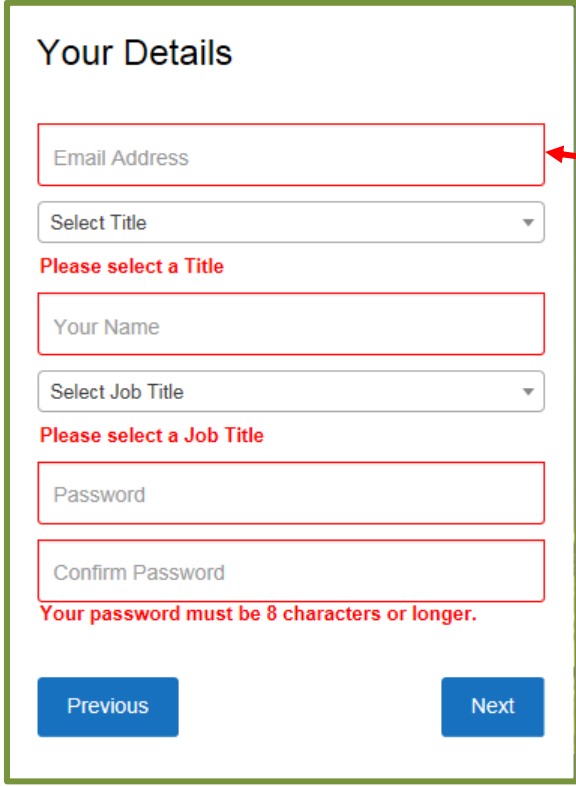Then select New Registration and Next to continue

Registration Type

Please select the type of Registration you wish to complete. If you are not sure which is the most appropriate selection click the ? next to the selection for more information.

Registration Type	Select
? New Registration	⦿
? Advisor to existing Registration	○

Already Registered ?

Next

Complete Your Details and then select Next

Your Details

Email Address

Select Title ▼

Please select a Title

Your Name

Select Job Title ▼

Please select a Job Title

Password

Confirm Password

Your password must be 8 characters or longer.

Previous   **Next**

Please note your email address will be your username once registered

![Leek United Building Society logo]

Enter all relevant fields under Organisation Details and select Next

Organisation Details

FCA Number

Please enter a Valid FCA Number

Organisation Name

Post Code

Property Name

Property Number

Road

District

Town

County

Phone Number

Select Network ▼

Select Mortgage (

Previous   Next

If the network you are part of is not listed then please advise us using the email or phone number below.

0808 281 9309

You will then be asked to confirm your details. If the information is correct then select 'Create Account'.

Once the account has been created you will be logged into the system.

Following registration in order to log in you will need to enter your user name (this will be your email address) and password on the following homepage:
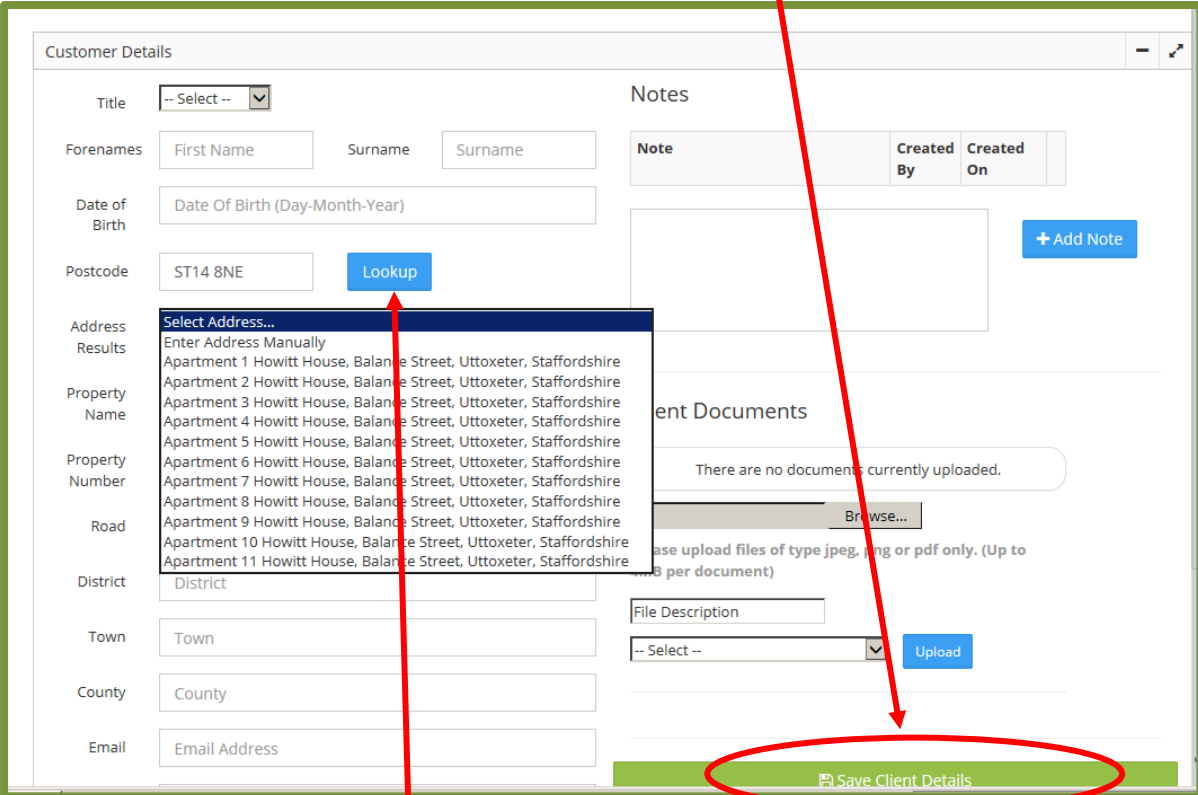https://www.leekunitedintermediaries.co.uk/Account/Login?ReturnUrl=%2f

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'.
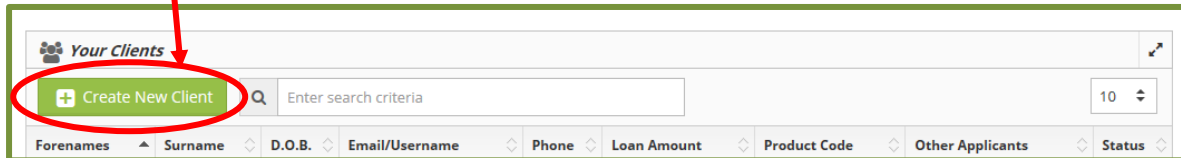
You will then be taken to the Customer Details screen.

Enter all the relevant details and then select 'Save Client Details'

You can also use the address lookup to find your address by entering your postcode and selecting lookup – which will display all of the addresses in the area.

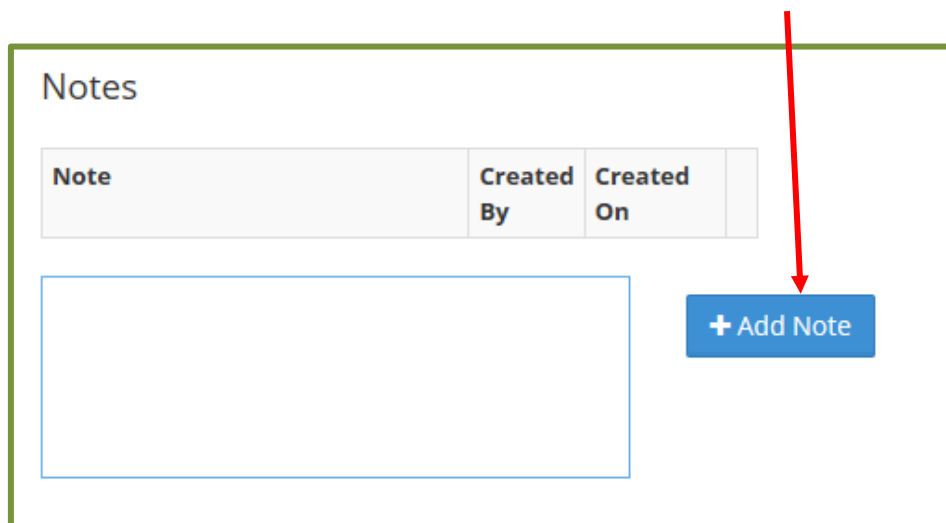When all the details have been entered a message will be displayed in the top right hand corner to confirm the client has been saved successfully.
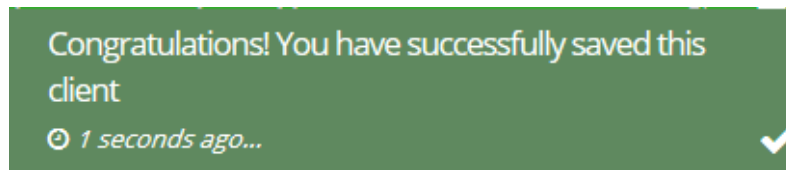
2.1   Notes and Updates

Notes to support the application can also be added through the system. In order to add a note enter the relevant text in the text box and select Add Note.


You will also be able to see any notes and updates added by the Underwriting Team who will notify you by email to advise you to log on the system for updates.

3. 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 enter the customer record where you can select either 'Single Application' or 'Joint Application' in the Applications section.
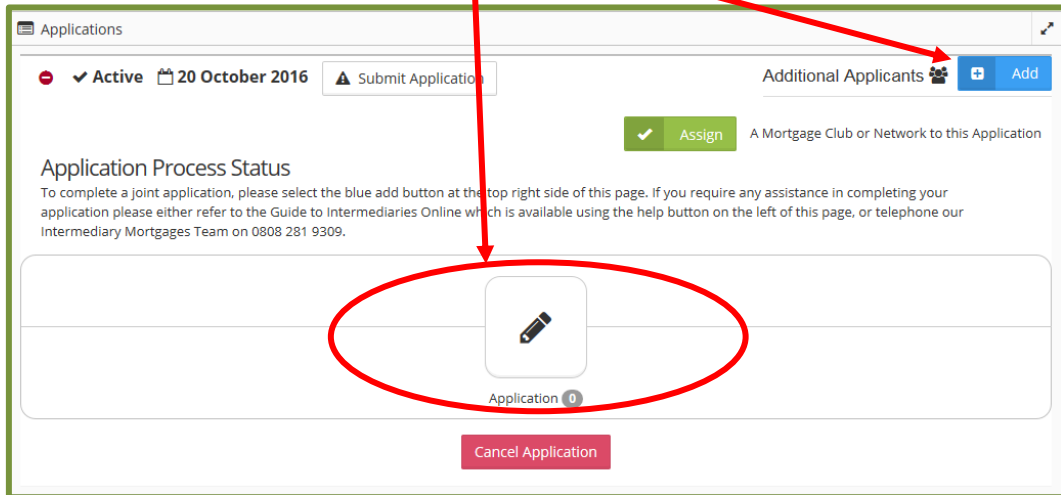

You will then need to select a submission route for the application. This will be either a Direct Application or the Mortgage Club/Network that you are affiliated.
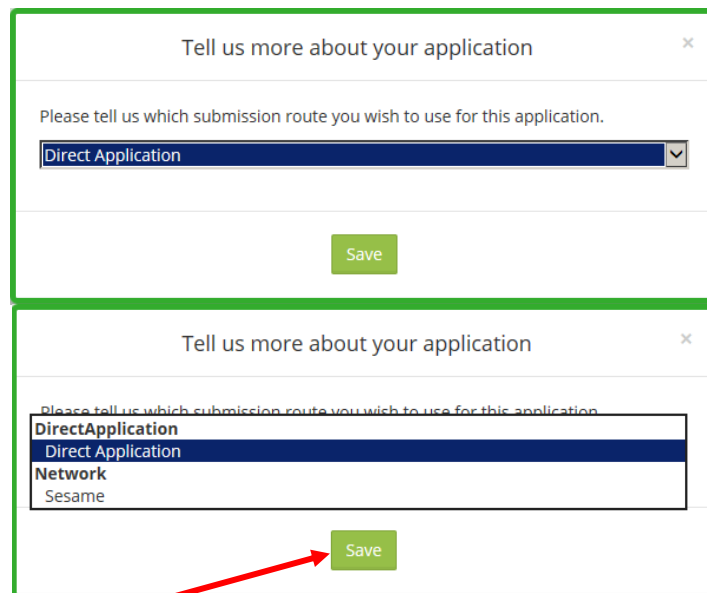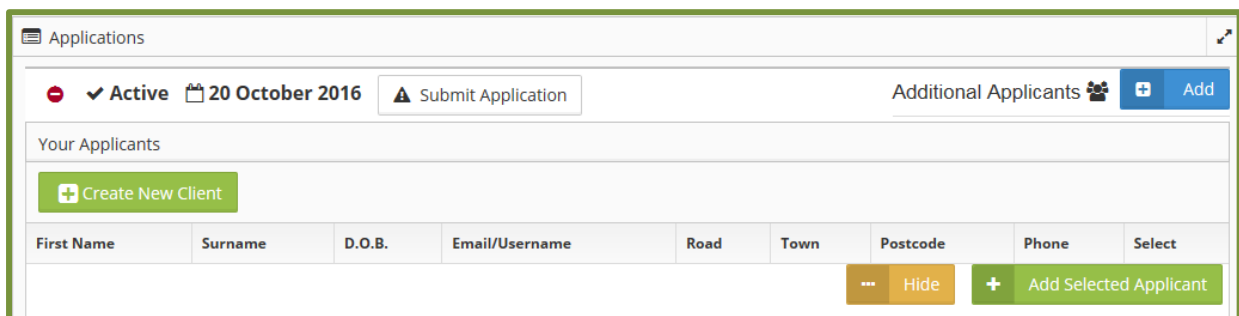

Then select Save.

To process the application select Application. If the application is Joint then you can add the second applicant by selecting Add.


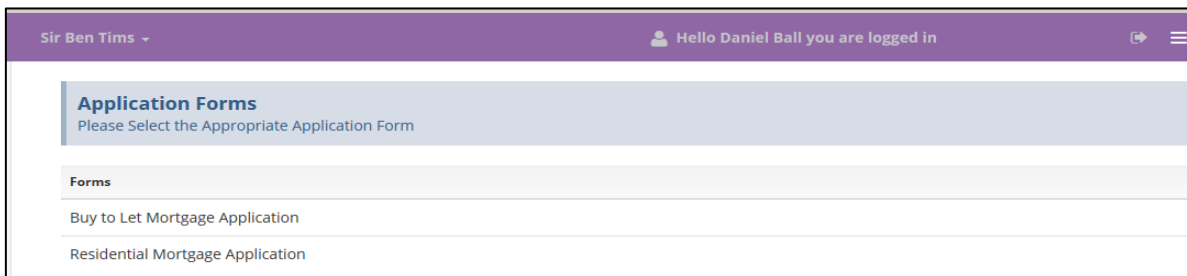You will then be able to select create a new client.

- *Existing clients are visible however, unfortunately you will not be able to select existing clients or add an existing client to the current mortgage at this stage (this has been identified and the society is currently working to resolve the issue) apologies for the inconvenience.*

Once all applicant details have been saved then select Application.
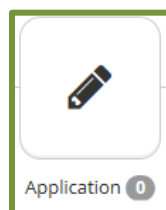
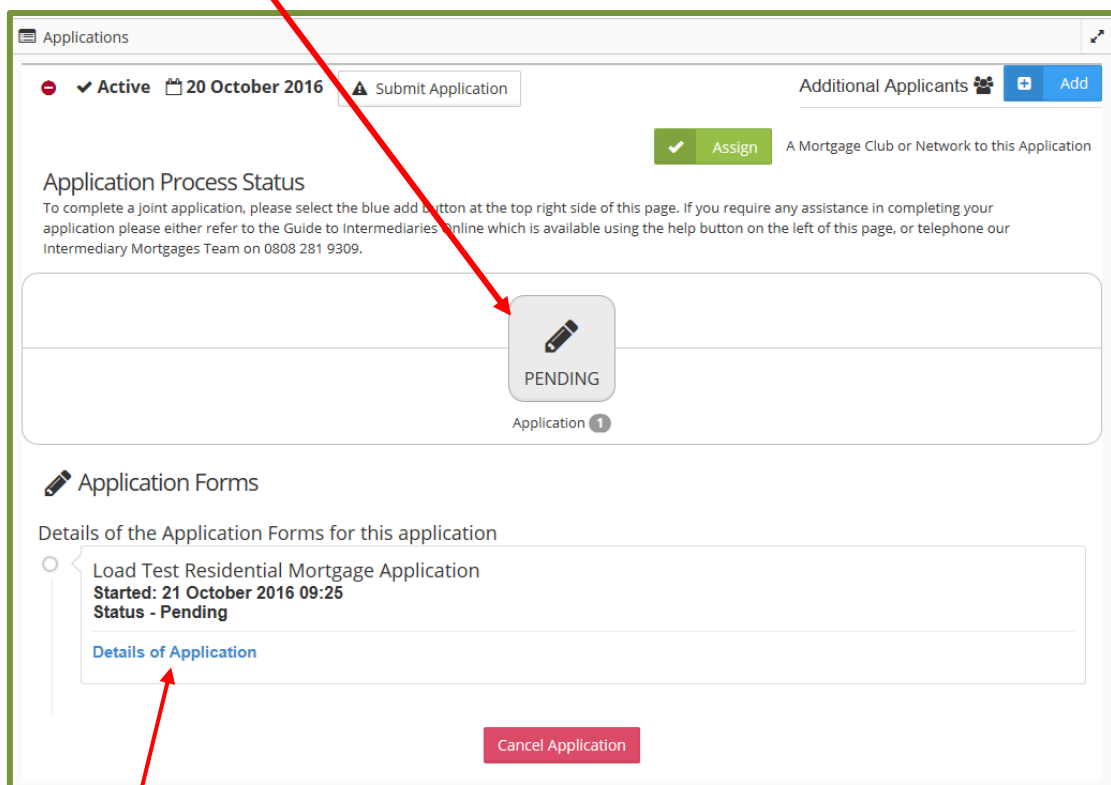Then select the type of application being made (Residential or Buy to Let)

You will then be able to start to process the application.

4. 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 and then select pending.

This will display further details shown here. 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.

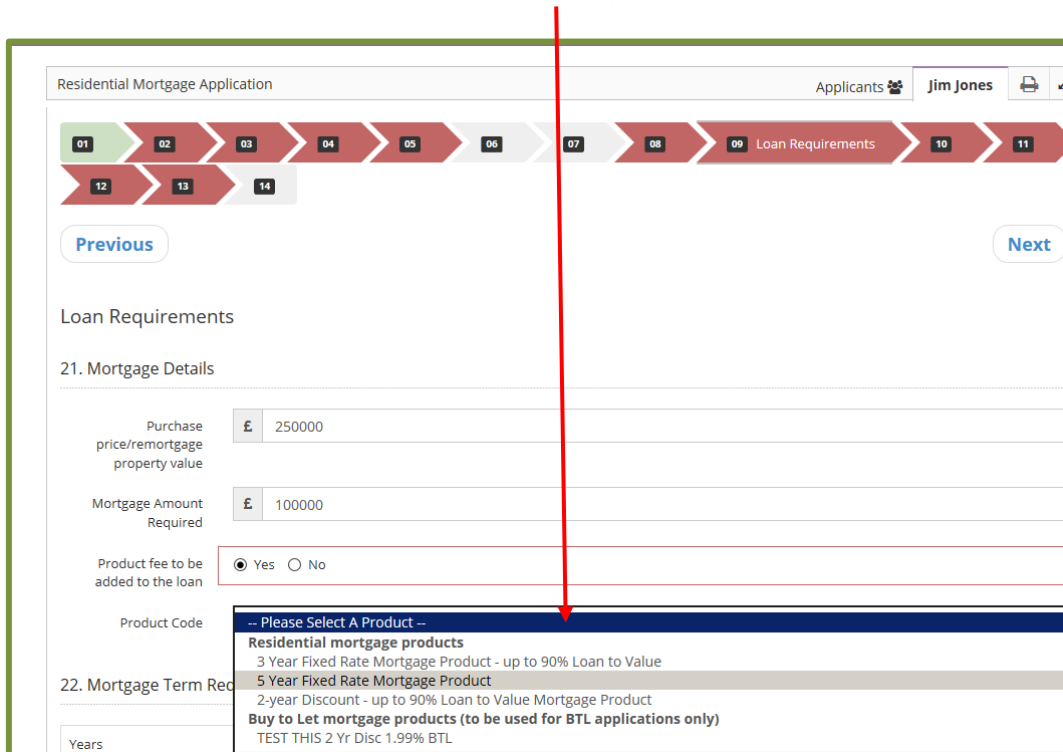# 5. Completing an Application

5.1   Application Submission

When all details have been entered for your clients on each section then select Next in order to proceed to the next section. If required you can also return to the previous section by selecting Previous.
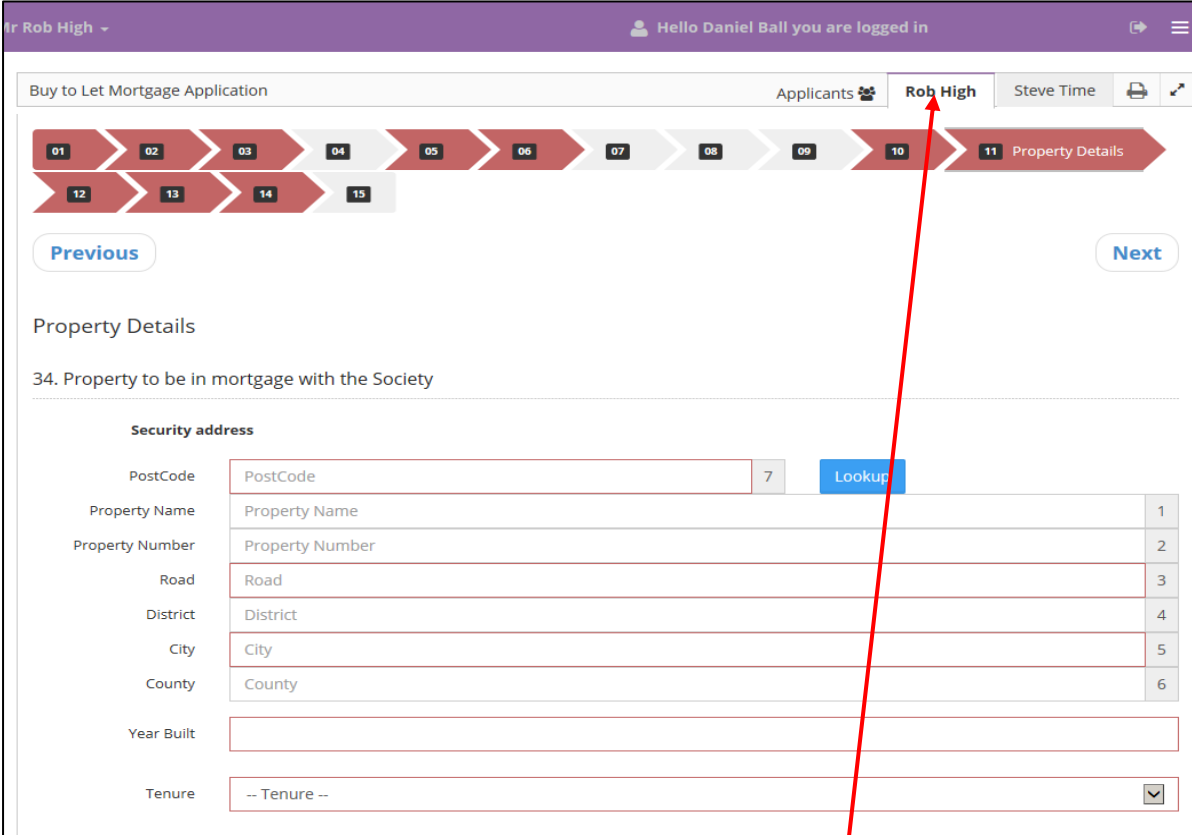
Miscellaneous options that appear within the application process.

Product page with dropdown box showing mortgage options

Note: Please make sure that you select the correct product for your required application either residential or buy to let.

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

Using the "Add New Row" button

Once you have entered all details you will be taken to a Summary Page (section 13). Before you can complete the application you will need to check that all mandatory fields are completed.

You will also be able to utilise the "address lookup" whilst moving through the application process.

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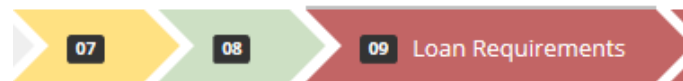
If a section is highlighted **Red** then MANDATORY questions are incomplete (these sections are defined with a red outline). You can go to the relevant section via the summary page by selecting sections highlighted **Red**.

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.

5.3   Supporting Documents

Once you have selected Complete Application Form you will then be taken to the final submission page. This page will then give you the opportunity to upload any supporting documents that you may require (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.

You are almost ready to submit your application

You have completed all the necessary forms. Before you can submit an application, it will be necessary to upload at least one item of supporting documentation.

Please upload your supporting documents

Document	Type		
Passport	Proof of ID/Residency	Edit	Delete

Browse...

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

File Description   -- Select --   Upload

Please make sure that you fill in the file description when completing the upload of any documentation.

✔ Submit Application

This application is now ready to be submitted. Please ensure that the customer documents and the customer notes are up to date before the application is submitted.

When this has been done select Submit Application to complete.

The following message will now be displayed confirming successful submission of the application. Select Ok to proceed.
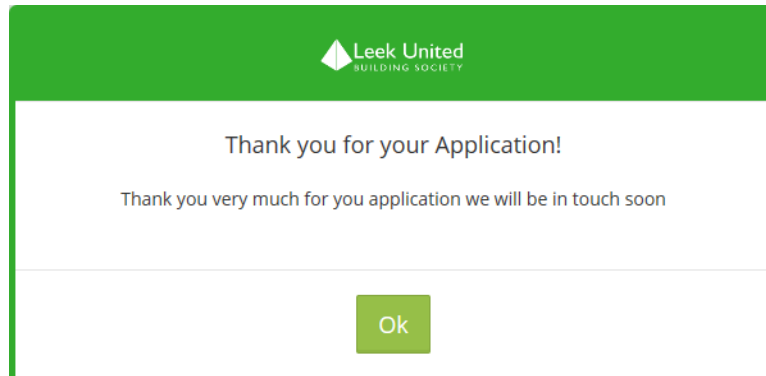
5.3   Saving/Printing the Application

In order to save or print a submitted application you will need to access the relevant client. Then select ⊕ in the applications section in order expand the field.
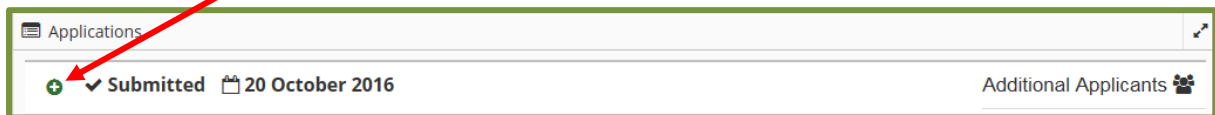
This will then display the following section. Select Completed to show the Details of the Application.
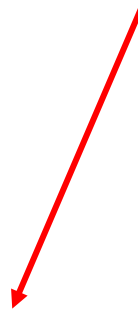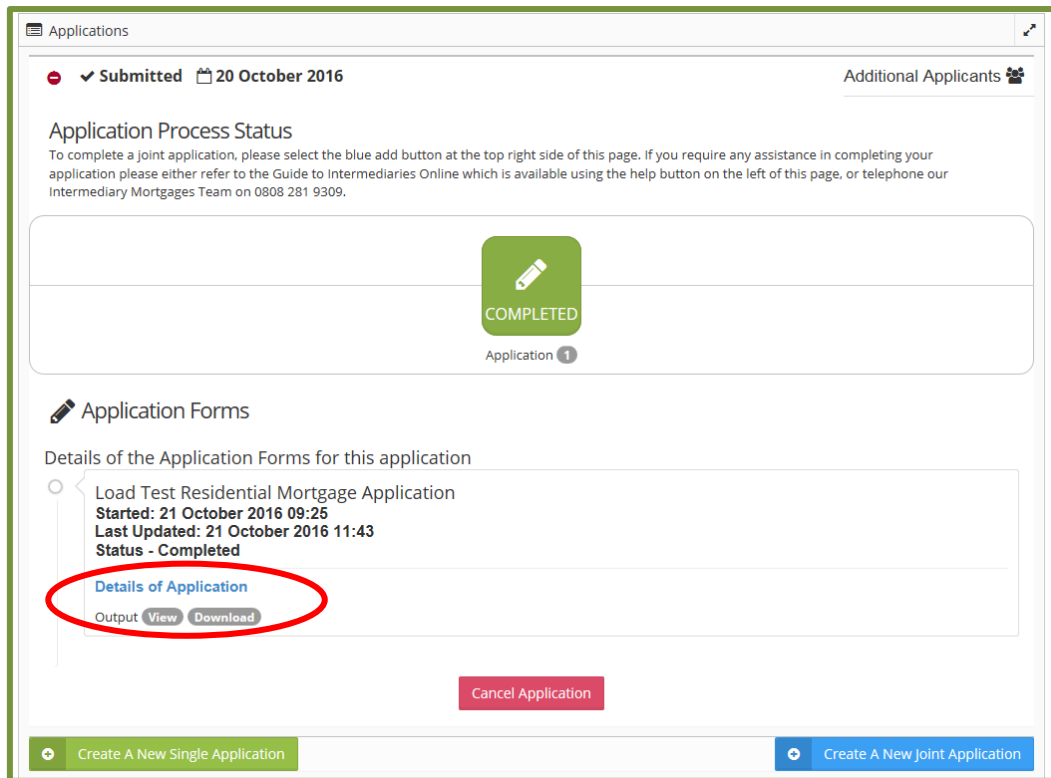
You can then either View the application on a web page ready to print or Download as a PDF which can be saved for your records.

Note: A signed declaration and direct debit mandate will be required before a mortgage offer can be issued. You can print off the application by clicking the print icon located in the top right-hand corner.
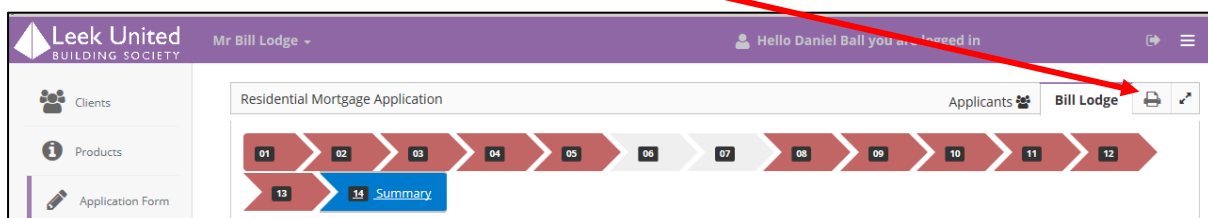
6. Frequently Asked Questions

Q. How do I register?

A. You can register to use Intermediaries Online when you visit the site. This will allow you to register and submit an application to ourselves, without delay. 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, 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. All applications must be submitted with at least one item of supporting documentation, if you do not have this available please simply upload a copy of your companies letter headed paper. Applications will be credit checked upon receipt but they cannot be fully assessed until all supporting documentation is received. Our Mortgage Processing Team will be in touch to advise you what, if any, further documentation is required.

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

A. Please contact our Intermediary Mortgages Team on 0808 281 9309.

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 using Intermediaries Online.

Q. What if I have a guarantor application to submit?

A. We are not presently able to accept these online and you will need to obtain an application form by contacting our Intermediary Mortgages Team on 0808 281 9309.

7.Contact Details

For queries before submission please contact the intermediary's team

Phone: 0808 281 9309
Email: intermediary.mortgages@leekunited.co.uk

For queries post submission please contact the processing team

Phone: 01538 714089 (please ask for processing team)
Email: mortgage.processing@leekunited.co.uk

Please Note: Calls may be monitored and recorded for training purposes