

Leek United Building Society Online Broker System

The Easy Way to submit a Mortgage Application.




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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.

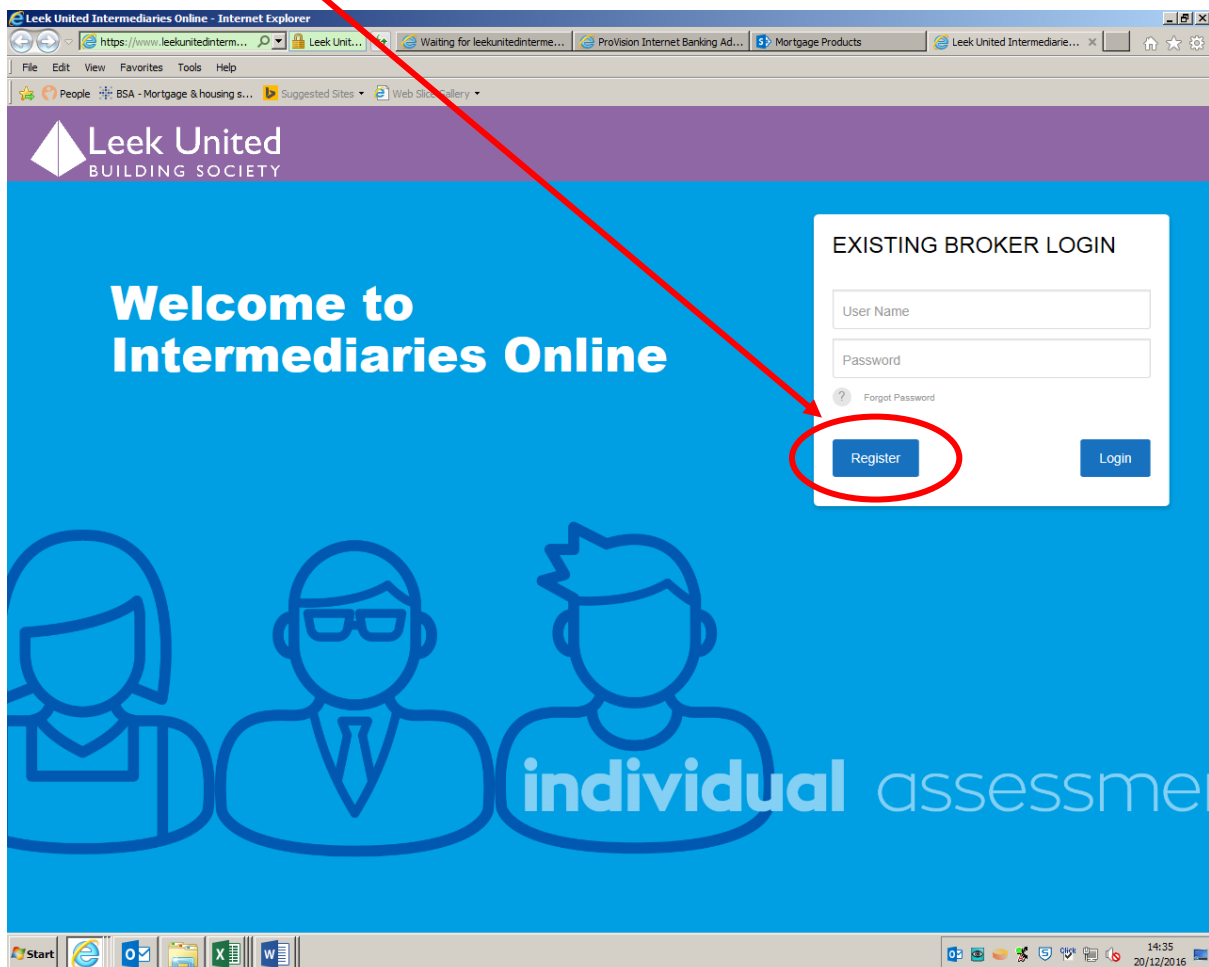
To check your browser settings select  in the top right corner and About Internet Explorer. You may need to update your internet browser if you are on a version prior to IE11.

1.2 Online Registration

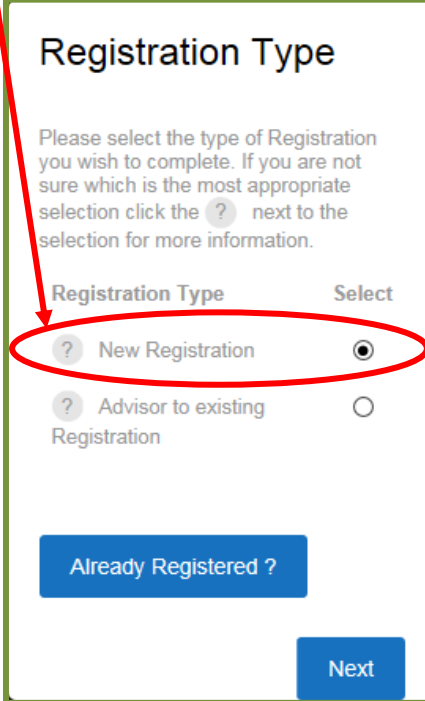
In order to register online select the following hyperlink:

<https://www.leekunitedintermediaries.co.uk/Account/Login?ReturnUrl=%2f>

Then select **Register**



Then select **New Registration** and Next to continue



Registration Type

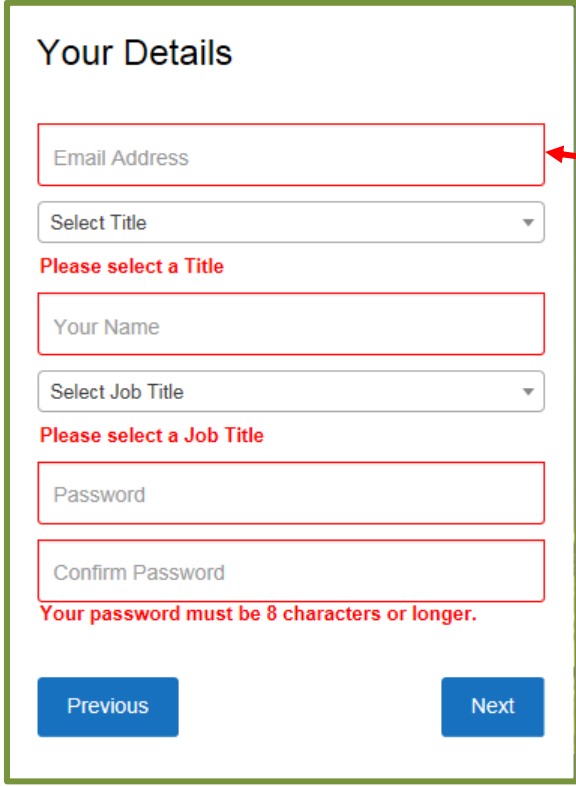
Please select the type of Registration you wish to complete. If you are not sure which is the most appropriate selection click the ? next to the selection for more information.

Registration Type	Select
? New Registration	<input checked="" type="radio"/>
? Advisor to existing Registration	<input type="radio"/>

[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

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'.

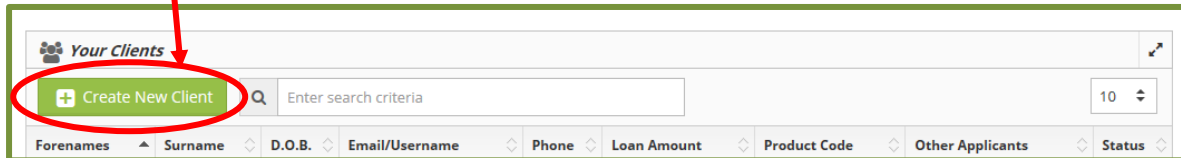
Once the account has been created you will be logged into the system.

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>

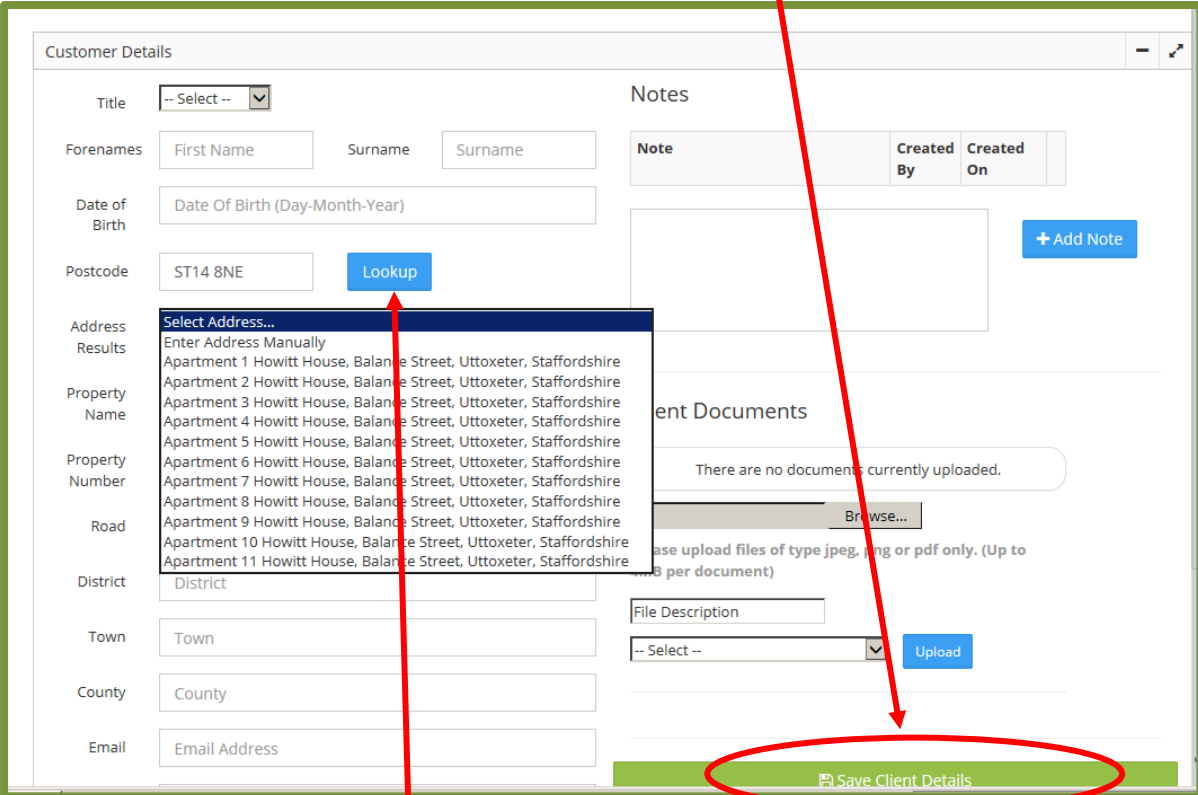
2. Creating a Client

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'.



Customer Details

Title: -- Select --

Forenames: First Name Surname: Surname

Date of Birth: Date Of Birth (Day-Month-Year)

Postcode: ST14 8NE [Lookup](#)

Address Results: Select Address...
 Enter Address Manually
 Apartment 1 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 2 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 3 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 4 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 5 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 6 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 7 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 8 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 9 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 10 Howitt House, Balance Street, Uttoxeter, Staffordshire
 Apartment 11 Howitt House, Balance Street, Uttoxeter, Staffordshire

Property Name:
 Property Number:
 Road:
 District: District
 Town: Town
 County: County
 Email: Email Address

Notes

Note	Created By	Created On
+ Add Note		

Client Documents

There are no documents currently uploaded.

[Browse...](#)

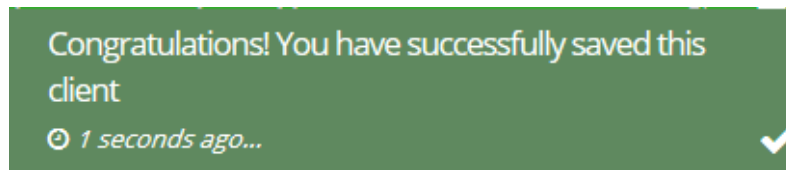
Please upload files of type jpeg, png or pdf only. (Up to 5MB per document)

File Description: -- Select -- [Upload](#)

[Save Client Details](#)

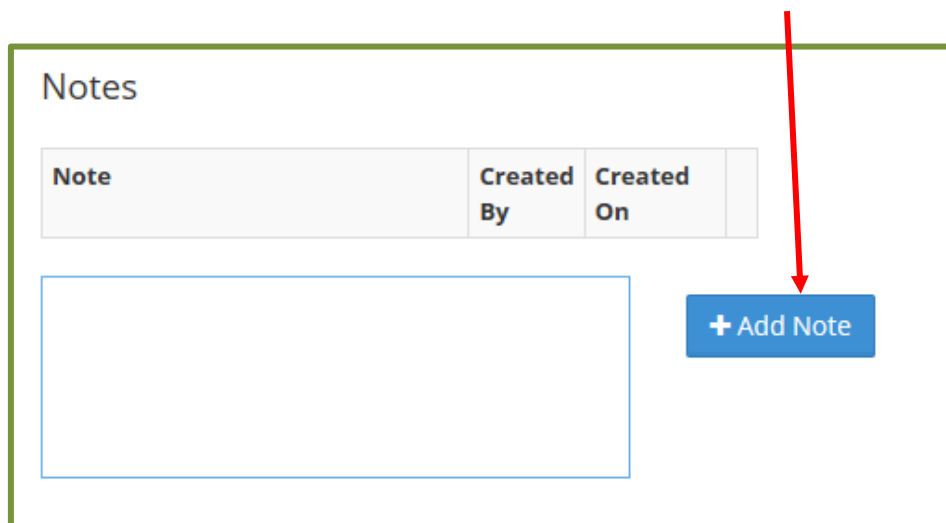
You can also use the address lookup to find your address by entering your postcode and selecting lookup – which will display all of the addresses in the area.

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**.



Note	Created By	Created On

+ Add Note

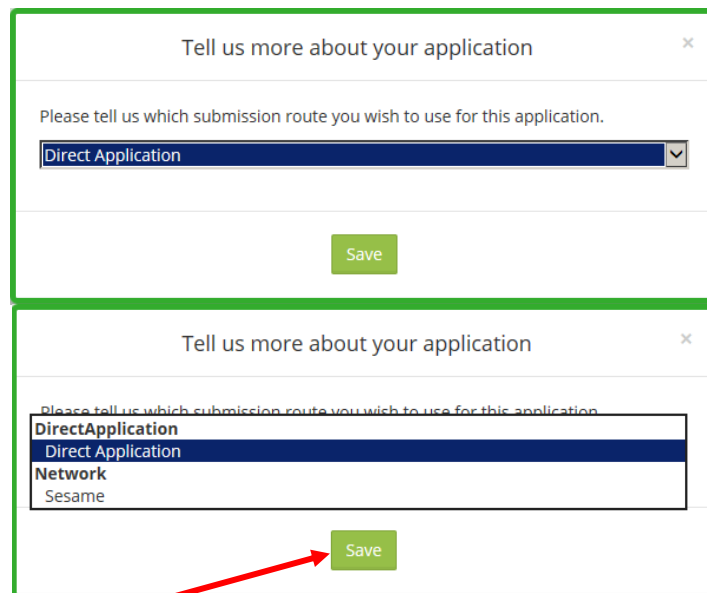
You will also be able to see any notes and updates added by the Underwriting Team who will notify you by email to advise you to log on the system for updates.

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.

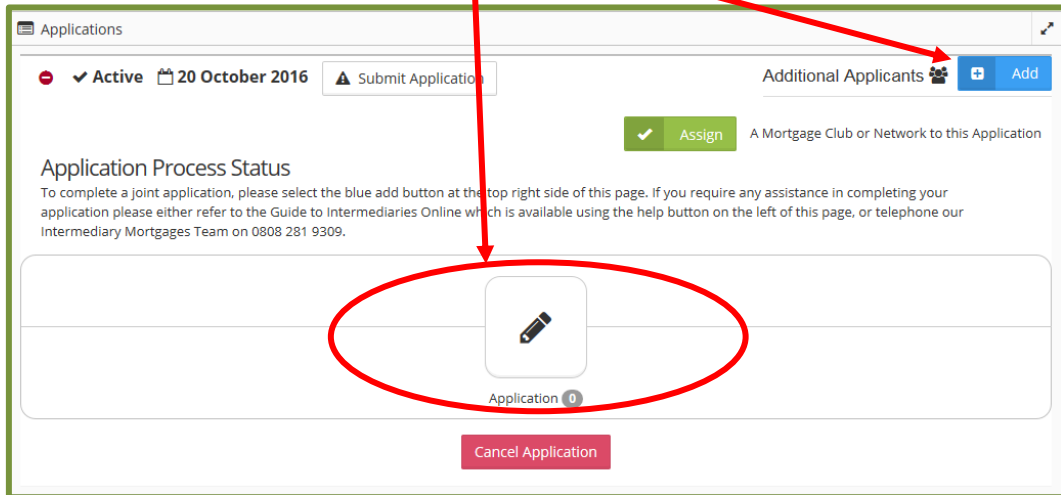


You will then need to select a submission route for the application. This will be either a Direct Application or the Mortgage Club/Network that you are affiliated.



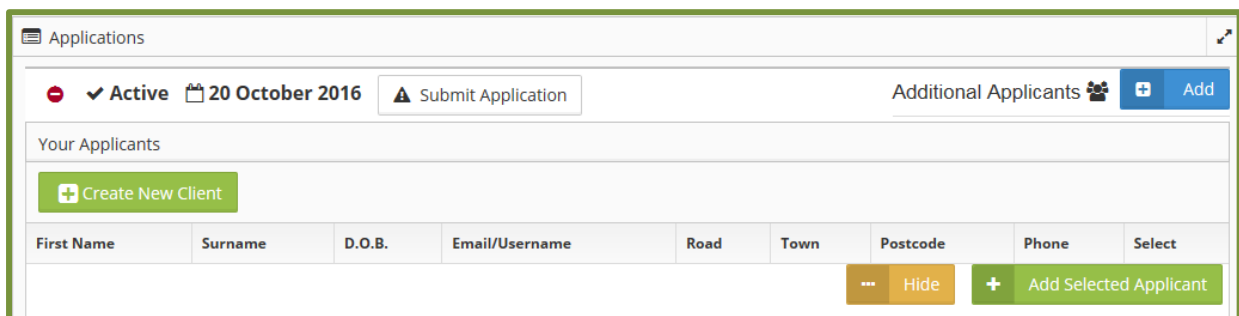
Then select **Save**.

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

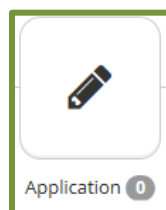


You will then be able to select **create a new client**.

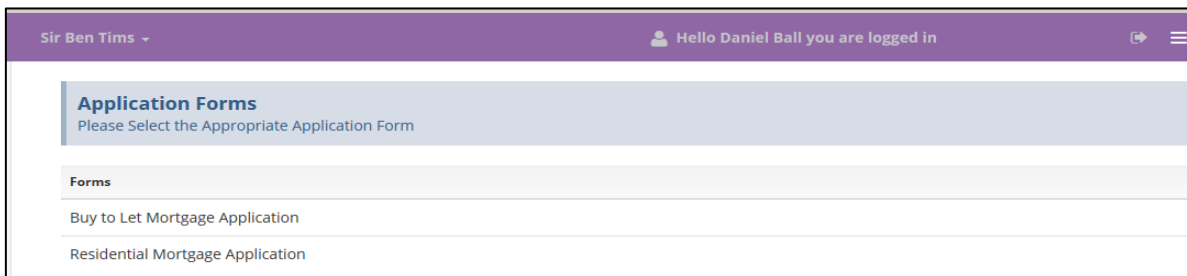
- *Existing clients are visible however, unfortunately you will not be able to select existing clients or add an existing client to the current mortgage at this stage (this has been identified and the society is currently working to resolve the issue) apologies for the inconvenience.*



Once all applicant details have been saved then select **Application**.



Then select the type of application being made (Residential or Buy to Let)

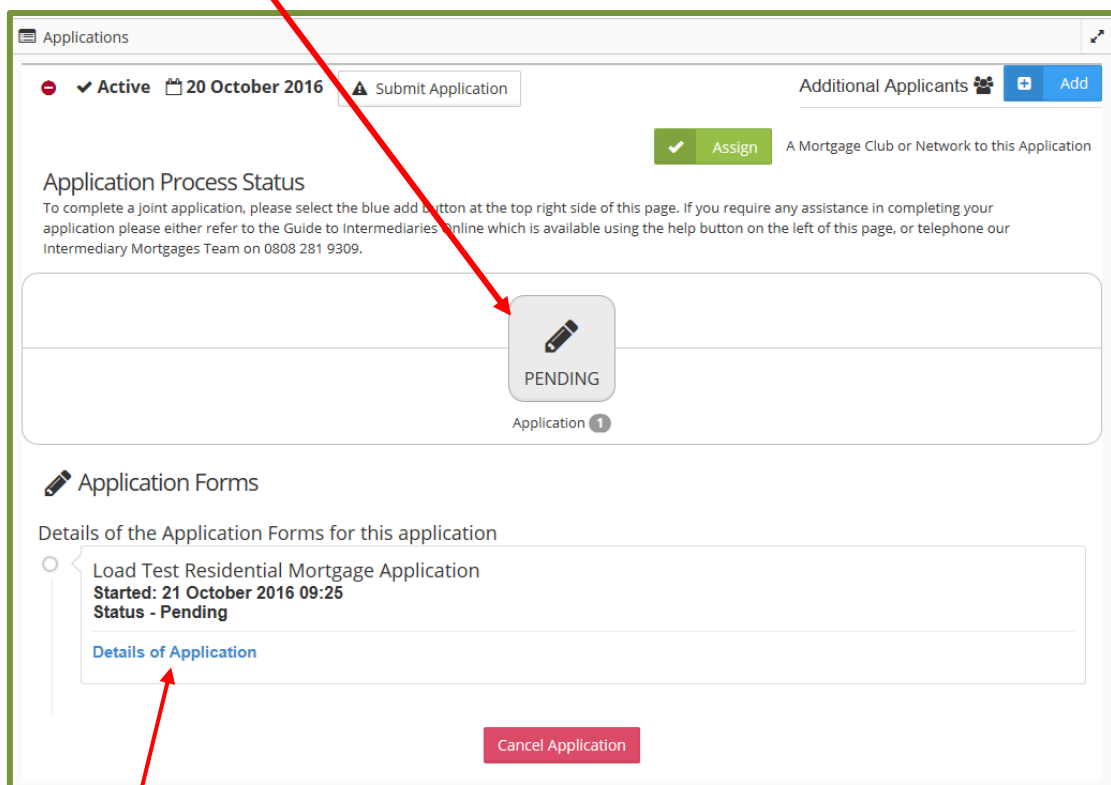


You will then be able to start to process the application.

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**.

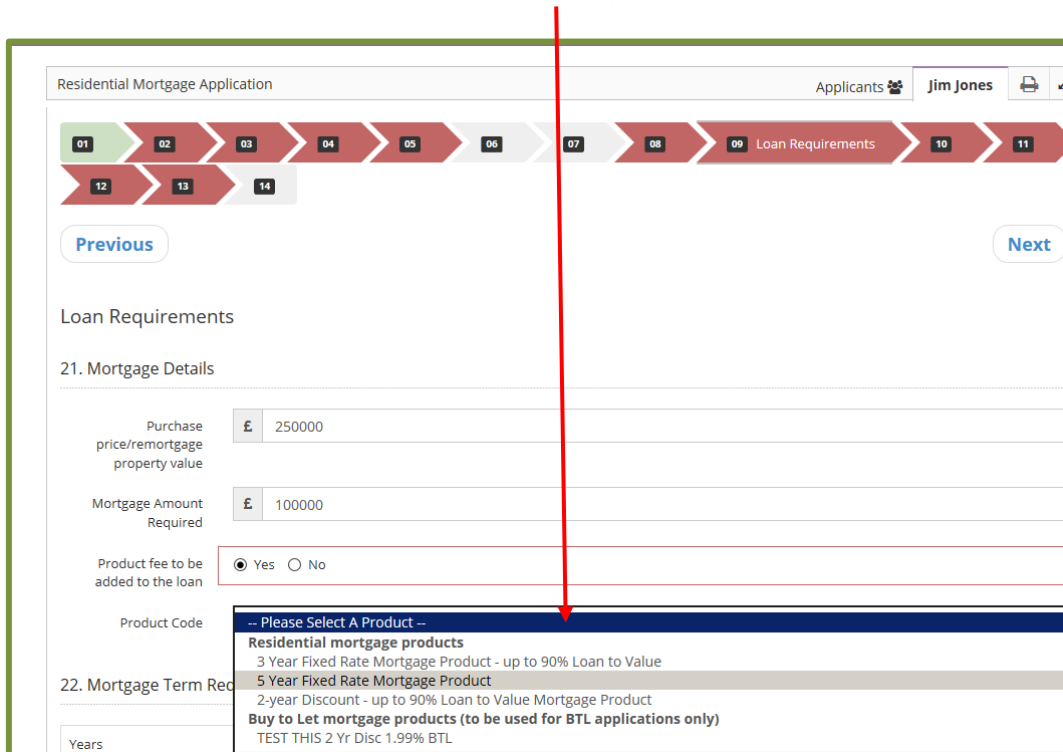
5. Completing an Application

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](#).

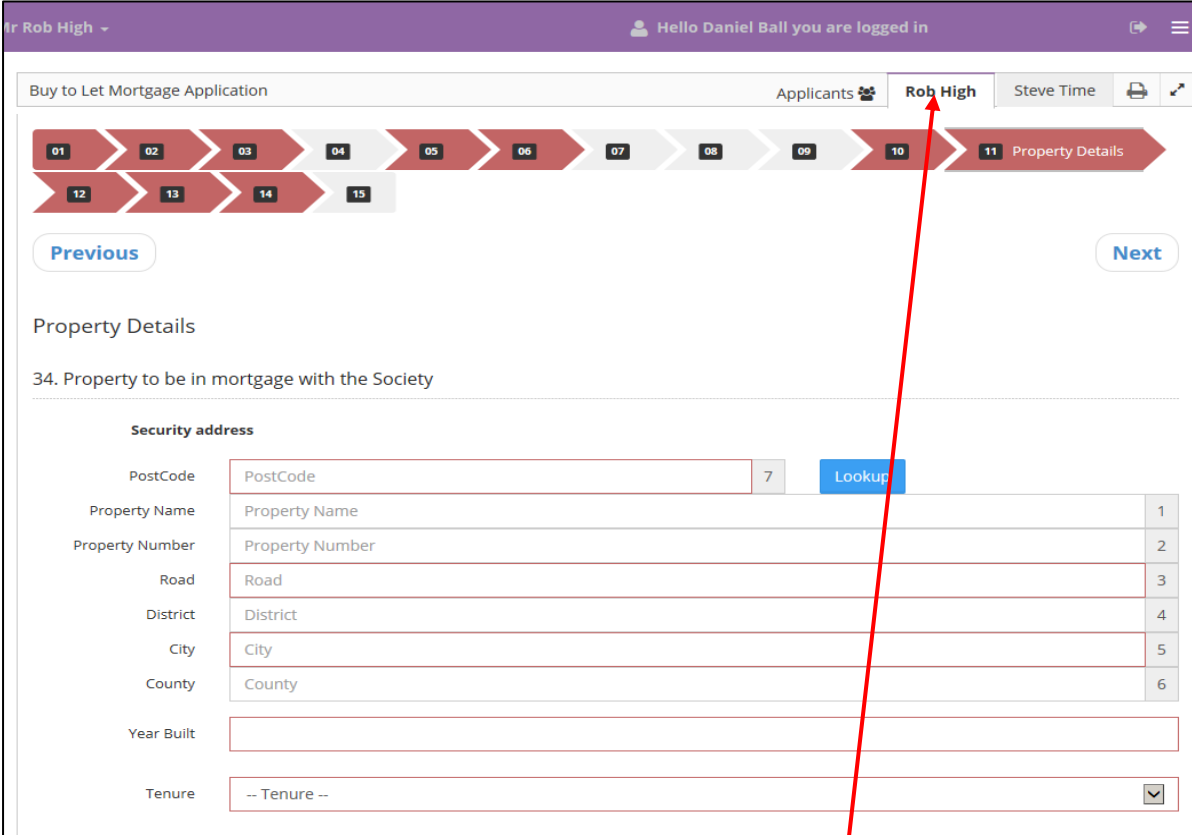
Miscellaneous options that appear within the application process.

Product page with dropdown box showing mortgage options



The screenshot shows a web application interface for a Residential Mortgage Application. At the top, there is a progress bar with steps 01 through 14. Step 09, 'Loan Requirements', is currently active. Below the progress bar are 'Previous' and 'Next' buttons. The main section is titled 'Loan Requirements' and contains a sub-section '21. Mortgage Details'. This section includes input fields for 'Purchase price/remortgage property value' (£ 250000) and 'Mortgage Amount Required' (£ 100000). There is a radio button selection for 'Product fee to be added to the loan' with 'Yes' selected. Below this is a dropdown menu for 'Product Code'. The dropdown menu is open, showing a list of mortgage products: 'Residential mortgage products', '3 Year Fixed Rate Mortgage Product - up to 90% Loan to Value', '5 Year Fixed Rate Mortgage Product', '2-year Discount - up to 90% Loan to Value Mortgage Product', and 'Buy to Let mortgage products (to be used for BTL applications only)'. A red arrow points from the text above to the dropdown menu.

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

Mr Rob High Hello Daniel Ball you are logged in

Buy to Let Mortgage Application Applicants Rob High Steve Time

01 02 03 04 05 06 07 08 09 10 11
12 Credit & Status Declarations 13 14 15

Previous Next

Credit & Status Declarations

If you answer YES to any of the following questions please give full details in Additional Details question 41.

39. Credit Declarations

Ever personally, or as a Company Director, been bankrupt, insolvent or entered into any arrangement with your creditors? Yes No
If the answer is yes, bankruptcy must have been discharged more than 6 years ago. IVA's must have been completed over 3 years ago

Had any late payments on any credit commitments within the last 3 months? Yes No

Have you been 4 or more months behind on any commitment within the last 3 years? Yes No

Had a County Court Judgement or Default Judgment? Yes No
If yes must have been satisfied at least 6 months, total no more than £500 and be registered over 3 years ago

Using the "Add New Row" button

Residential Mortgage Application Applicants Jim Jones

01 02 03 Dependents 04 05 06 07 08 09 10 11
12 13 14

Previous Next

Dependents

6. Please provide details of dependents for all applicants (aged 16 and under)

Do you have any dependents? Yes No

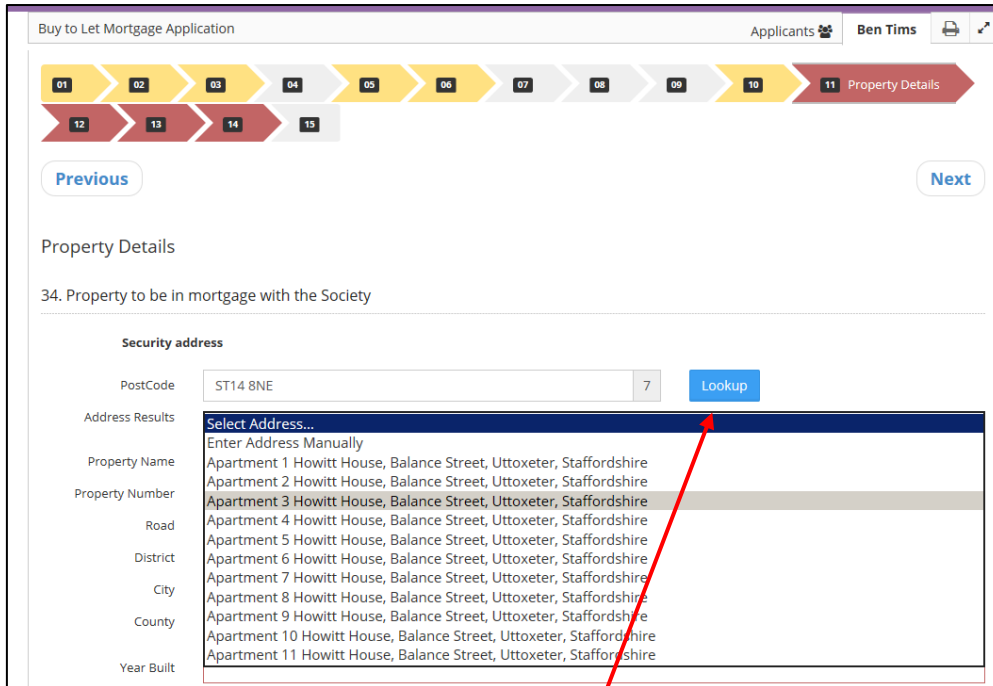
7. Dependents details

If more than one dependent use the add new row button.

Full Name	Date of Birth	Relationship	Does this child live with you full time?
<input type="text"/>	<input type="text"/> -- Ple <input type="text"/>	<input type="text"/> -- Relationship -- <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/> -- Ple <input type="text"/>	<input type="text"/> -- Relationship -- <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/> -- Ple <input type="text"/>	<input type="text"/> -- Relationship -- <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No

Add New Row

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.



Buy to Let Mortgage Application

Applicants Ben Tims

01 02 03 04 05 06 07 08 09 10 11 Property Details 12 13 14 15

Previous Next

Property Details

34. Property to be in mortgage with the Society

Security address

PostCode ST14 8NE 7 Lookup

Address Results

Select Address...

Enter Address Manually

Property Name Apartment 1 Howitt House, Balance Street, Uttoxeter, Staffordshire

Property Number Apartment 2 Howitt House, Balance Street, Uttoxeter, Staffordshire

Road Apartment 3 Howitt House, Balance Street, Uttoxeter, Staffordshire

District Apartment 4 Howitt House, Balance Street, Uttoxeter, Staffordshire

City Apartment 5 Howitt House, Balance Street, Uttoxeter, Staffordshire

County Apartment 6 Howitt House, Balance Street, Uttoxeter, Staffordshire

Year Built Apartment 7 Howitt House, Balance Street, Uttoxeter, Staffordshire

Apartment 8 Howitt House, Balance Street, Uttoxeter, Staffordshire

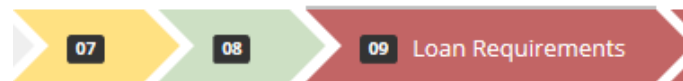
Apartment 9 Howitt House, Balance Street, Uttoxeter, Staffordshire

Apartment 10 Howitt House, Balance Street, Uttoxeter, Staffordshire

Apartment 11 Howitt House, Balance Street, Uttoxeter, Staffordshire

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.

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**.

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

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

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

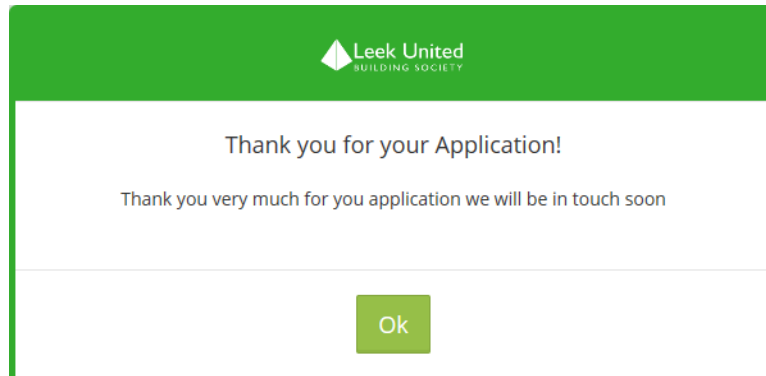
File Description [Upload](#)

[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.

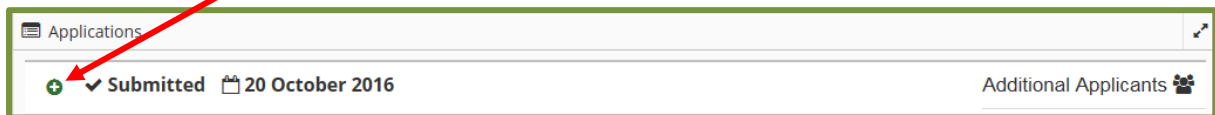
When this has been done select **Submit Application** to complete.

The following message will now be displayed confirming successful submission of the application. Select Ok to proceed.

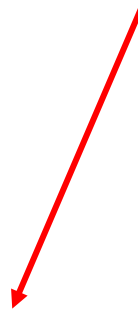


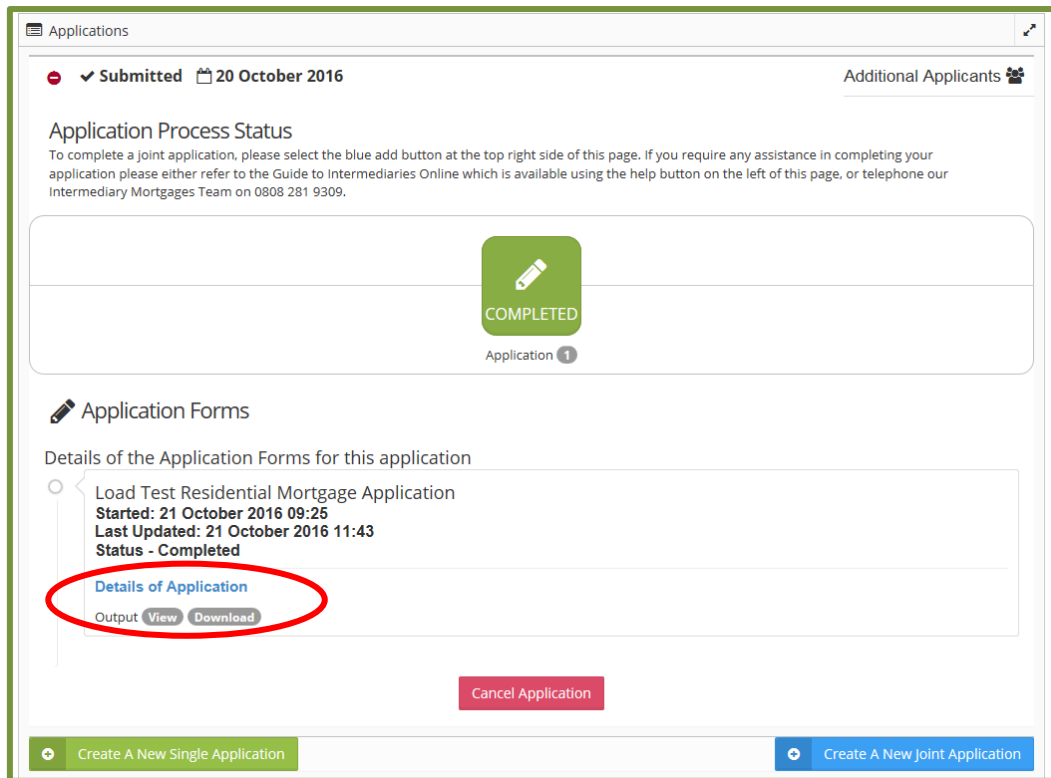
5.3 Saving/Printing the Application

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.



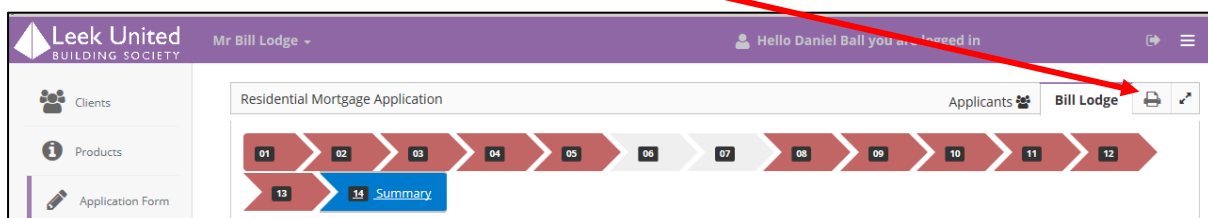
This will then display the following section. Select **Completed** to show the Details of the Application.





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