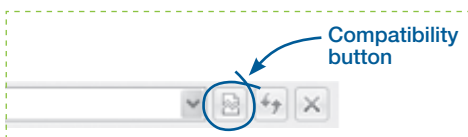


Broker portal navigation tips.

June 2013: issue 2

Technical requirements

- In order to access the Broker portal you must have Internet Explorer Version 7 or above.
- If you use Internet Explorer Version 8 you will need to ensure that the site is displayed in 'Compatibility View'. To do this, click on the compatibility button between the web address and the 'Refresh' button at the top of your screen.



- No installation of software necessary. Simply access the portal from the Aldermore website and save the location in your favourites.
- Scanning capability is required so that supporting documents can be uploaded.

Home page

- From here you can access the most recent cases submitted, also:
 - View cases and upload documents
 - Case Search
 - Produce KFI's
 - Start a new DIP/FMA
 - Edit your own profile
 - Assess your clients affordability via our Affordability Calculators

How to view cases and upload documents

- Clicking on the Application ID for your case on the Home Page will take you to the "Application Summary" screen.
- The summary will give you a brief overview of the case, the progress made, Aldermore's requirements (Checklist Items) and documents for your use.
- In the Checklist Items section you will find an option to "upload" the required documents to Aldermore. A scanned document, saved on your computer, is then immediately placed on to the case which will be underwritten once all requested documentation has been submitted.
- Within Case Summary, when you select an individual case you will see the option for 'Send/View Message'. Any messages typed in here will be attached to the specific case and will be reviewed in turn by the mortgage processing team.
- To view responses sent by Aldermore simply go back into 'Send/View Message' and the replies will be there; We'll let you know when there is a new message to view.

Case search

- Any older cases not displayed on the 'Home' page can be located from here, using a number of search options.
- The reference number refers to the Aldermore Application ID starting with the letter 'A' that will be assigned to each of your cases.

Convert more business now.

Visit aldermore.co.uk/resi

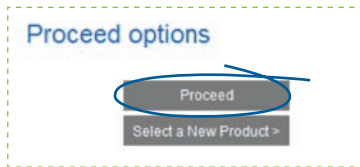
or call **0333 321 1000**



Broker portal navigation tips.

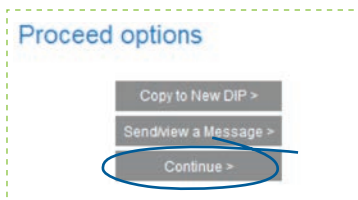
Produce Key Facts Illustration (KFI)

- Once started, the KFI must be keyed in full. If you exit midway through this process the information input will not be saved.
- Click "Proceed" to enter the 'DIP' function.

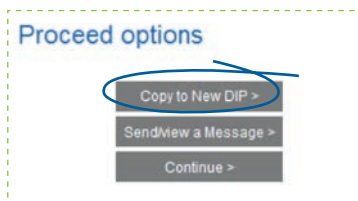


New DIP/Application

- A DIP may be submitted without already having produced a KFI, as the KFI will be generated automatically upon DIP approval. At this stage the Application Status will show as DIP KFI Produced.
- Once a DIP has been keyed there is an option at the end of the process to start to key the full application.
- A full mortgage application ('FMA') cannot be keyed unless a DIP has already been submitted.
- Ensure that if there are two applicants, this is selected on the 'Personal' screen of the 'Applicant' screen, as it will not be possible to go back and add another applicant after this screen.
- When keying a DIP or FMA, note that you can navigate between screens by selecting the headings on the left hand side of the screen.
- Should your decision in principle decline, you may click "Continue" which will allow you to edit the DIP and resubmit.



- Copy to New DIP is a function available when producing multiple decisions, e.g. multiple BTL applications or to resubmit a DIP when the decision has expired."



- '?' icons will be displayed throughout the submission process. Clicking on these will display useful information about the field that requires completing.
- Try to ensure the balances of any commitments provided are as up to date as possible to make sure that what is keyed ties in with what is found on the credit search.

- Joint commitments should be keyed once only, under the commitments of applicant 1. If they are keyed for applicant 2 as well, the system will count the commitment twice in the affordability calculator.
- Underlined text such as the available products and documents on the 'Application Summary' screen will be Hyperlinks. This means if you click on them a new window will appear displaying further information.
- Each field is case sensitive. Therefore, appropriate upper and lower case letters should be used throughout the DIP / Application process. For example, input "John Smith" as opposed to "JOHN SMITH".

Save options

- The 'Save' option is to be used if you need to exit the case and continue the application later. This refers to both DIP and Application stage.
- When you do go back into the case, click 'Apply Now' and this will take you back to the screen you last worked on.

My Profile

Here you can:

Change your password

- Enables you to change your existing password.

Change your correspondence address

- There is a drop down list of existing locations which you can select from.
- Alternatively, you can select 'New Location' which enables you to search for the required address and create a new location.

Change your contact details

- Enables you to change telephone, mobile and fax numbers.
- You will need to telephone Aldermore directly to change your email address.

Change your submission routes

- You will see from our website that we currently only accept business via a selected number of distribution partners. Please take a little time to set up your own preferred panel in this section.
- To do this click on the relevant distribution partner and click on the arrow button to transfer them to your 'Preferred List'.
- If you are an AR of one of our distribution partners you do not need to set up a preferred panel.

Calculator

- You must be logged in to view this.
- This is a tool that enables you to calculate affordability by inputting income and credit commitment details.
- There is a 'Residential calculator' and 'Buy to Let calculator'. The residential calculator is displayed by default. To access the Buy to Let calculator, click on the relevant link on the left hand side of the screen.

FOR INTERMEDIARY USE ONLY