Guide to using the Client Portal

Making it easy to exchange documents and sensitive information for the mortgage application





## Logging In

When your Adviser creates your portal account, you will receive two emails - one with your user name with the web link for the Portal, and a second one with your initial password. This email may go through to your junk folder, so please check to see if you've received it.

		P.	- FINA	NCIAL	
Usern	ame:				
User	name				
Passw	ord:				
Pass	word				
			Login		



- click Login.
- change



Note

If when you log in, your Adviser is working on your file at the same time, you will only have 'read-only' access to the portal. To gain full access, please log in again a short while later.

# Click on the web link to open the

Enter your username and password and

The first time you log in, you will need to your password. Your new password must be over **seven** characters in length and contain at least one number. Note that your password is case sensitive. If you forget your password, please contact your Adviser who will issue you a new one.

## Home Screen

The Home Screen will list any recent documents that have been added by your Adviser, show any recent messages and your current mortgage or insurance cases.



All your dealings with your Adviser are organised by 'case', e.g. 'Remortgage' or 'House Move'. If you have worked with your Adviser previously, you may have multiple 'cases' so please select the correct one using the dropdown list.

Your Cases	
Please choose your case:	
House Move, 77 Lassells Road	



#### **Recent Documents**

This section shows the most recently updated documents in the Client Portal. Click '**View All**' to display all documents available; alternatively, you can select '**Documents**' from the menu. To open a document, simply click on the document name.

#### Case: Remortgage



#### **Uploading Documents**

The Client Portal makes it easy to send documents to your Adviser electronically, and securely. There are two easy ways to do this:

L.You can u **Checklist** s this initially documents 2.You can upl **Documents** this when y documents

2. You can upload one off documents using the **Documents** section - we recommend using this when you only have a small number of documents to send or you have already uploaded your documents on the Checklist



1.You can upload a document from the **Checklist** section - we recommend using this initially when you are sending all your documents for the mortgage application.

# How to upload documents using the Checklist

You will find this tab on the Main Menu of the Portal. The **Checklist** includes a comprehensive list of documents required for a mortgage application but you only need to upload the ones requested by your adviser.

If you need to upload additional documents please use the Documents section, as explained next.



# Uploading Documents from the Documents section

Go to the Documents tab on the Menu and then click on the 'Add Document' button to open the 'Upload' screen. We recommend using this for a smaller number of documents or if the checklist cannot be used anymore.

L Contact Details



As soon as you upload a document, your Adviser is alerted through an automatically generated task.

#### **Tips for uploading documents**





Once you have chosen the file you want to upload, please name it, eg Bank Statement June

If you do not have access to scanner, you can photograpg documents using your mobi device. The pictures must b good quality or they will b rejected.



а	You can use the <b>free</b> scanning
gh	App Adobe Scan to transform
ile	images of your documents
be	into high-quality PDFs.
be	

### The Fact Find

Your Adviser requires a certain amount of personal information in order to recommend the most suitable products to meet your needs.

Your information is stored in a document known as a 'Fact Find'. Using the portal, your Adviser can give you access to review the information in your Fact Find. You access the Fact Find by clicking on the Home Screen and clicking the 'Fact Find' button. You will then see the different areas where you can enter and/or review information. You will always be able to review the Fact Find data but you may not always be able to edit the Fact Find - your adviser will let you know when this is required.

Personal Details E	Employment	Financial	Commitments	Existing Mortgage	New Mortga
			P	ersonal Detai	le
	Applic	ant 1		croonal Detai	15
Preferred Contact Method	d			~	
Nationality				~	
Current Residential Statu	ıs			~	
Date moved into your cu	rrent	dd mm yaa	D/		



## **Recent Products**

This screen shows all of the products associated with your current file. The screen will show the most recently updated products.

To see all your products, click on the 'View All' button, or select 'Products' from the main menu.



	Recent Products
gage	Purchase -
rance	
gage	Purchase -
gage	Purchase -
gage	Purchase -
	View All (08)

# Your cases are divided into 'Mortgages', 'Insurance' and 'Other products'. A summary of product information is displayed on screen as shown below:

✓ Mortgages <ul> <li>✓</li> </ul>		Insurance <b>01</b>	Insurance 🚳		Other products		
Nottingham Building Society, KFI Nottingham Building Society CP-PC Fixed til 01-10-21		Skipton Building Society Fixed	Skipton Building Society, KFI Skipton Building Society Fixed til 31-10-21		Coventry Building Society, KFI Coventry Building Society Fixed til 30-09-21		
Sub type	Purchase	Sub type	Purchase	Sub type	Purchase		
Loan to value	35.71%	Loan to value	35.71%	Loan to value	35.71%		
Account Number	AC123456	Account Number	8657575	Account Number	23423423		
Initial monthly cost	£551.00	Initial monthly cost	£549.13	Initial monthly cost	£528.88		
Status	Completed	Status	Current	Status	Completed		
Application date	05/09/2016	Application date	05/09/2016	Application date	05/09/2016		
Survey date	05/09/2016	Survey date	05/09/2016	Survey date	05/09/2016		
Offered date	05/09/2016	Offered date	05/09/2016	Offered date	05/09/2016		
Exchange date	05/09/2016	Exchange date	05/09/2016	Exchange date	05/09/2016		
Completion date	05/09/2016	Completion date	05/09/2016	Completion date	05/09/2016		
🖨 Abb	🖀 Abbey		A Clydesdale Bank PLC		Coventry Building Society,KFI Coventry Building     Society Fixed til 31-12-21		
Sub type	Purchase	Sub type	Purchase	Sub type	Purchase		

#### Secure Messaging

The home page shows a list of the most recent messages (each of which can be viewed by clicking on the message title), and you can open the 'Secure Messages' area from the home page to see a full list of any existing messages.



Within the 'Secure Messaging' page, unread messages are identified with an envelope icon. Click 'Read' to open the message. Once read, the envelope icon is replaced with a tick.

#### Adding a Message in the Portal

Click 'New Message' to open a blank message window. You can write a message to your Adviser as you would a standard email and click 'Send'.



#### **Reading a Message in the Portal**

Secure Messages	
Inbox 1	
Sent	
New Message	



### **Contact Details Section**

The Contact Details screen displays your name, address, phone numbers and email address. You can amend this information; please remember to you click the '**Save**' button to save your changes.

### **Changing your Password**

You can change your password using the '**Change Password**' option. Just enter your existing and new passwords and click 'Save Changes'.

### Help using the Portal

If you have any further questions about how to use the Portal account, your Adviser will be able to help you. Please call 01242 697821 for assistance.