



PORTAL POWER MOVES

Work smarter, not harder, with these heroic hacks designed to help you get the most from our system.

SAVE REGULARLY

Before progressing to a new screen, hit 'Save' to ensure all the info you've inputted is stored and you can return to it at any time.

CHOOSE WISELY

Carefully consider which submission route you choose, as it'll dictate the process your application follows.

CHECK INFO

For company buy to let applications, check that all director details match Company House records.

FOLLOW FORMATTING

Enter National Insurance numbers with no spaces and use our address finder to make sure details are captured in the correct fields.

KEEP IN CHECK

After you've entered the property details and clicked 'Next: Product Selection', the system will run property and credit checks. This may take around 15 seconds to complete. Don't be tempted to navigate back or refresh your screen as you'll delay the process.

LINK FOR PAYMENT

Once all mortgage application details are entered, you can send a secure card payment link to your client. The link can be generated through 'Manage Application' whenever you need it.

DID YOU KNOW?

AUTOMATED DOWNLOADS

Once you've selected a product, our system automatically downloads the corresponding AIP certificate and AIP ESIS documents.

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