

## Loans Origination 3.4 - Clients

### Creating a new client

In addition to being able to create a client in the 'Cases' screen, a client can be created in the 'Clients' screen prior to starting an application. You will have to insert the customer's personal details. Once this is complete, your client will show in 'Existing Clients' towards the bottom of the screen. You can now use the '+' button to add the client to an application. If you have a number of clients, you can use the search bar to find an existing client. You can also edit the client once created, in case of any change to personal details.

### Adding a document to a client

Documents can also be attached to a client in the client screen. To do this, click on the client name so it highlights blue, and then a 'documents' box will appear towards the bottom-right of the screen. You can attach a jpg, png or pdf file, up to a maximum of 4MB. Any documents larger than this will need to be emailed directly to the underwriter handling the case. You will need to choose a category for the document (eg payslip, pension letter, bank statement etc.) and give the file a name. It is helpful for the underwriting team if the description accurately describes the document (eg Mrs Smith March Payslip). Please bear this in mind when naming your documents! Any documents attached to a client will automatically populate in any cases that they are party to.

### Removing a client

When you click on a customer and it highlights blue, just underneath the documents box, you will see an option to remove the client. This will remove the client from your list of clients altogether, and any documents attached to that particular client will be deleted.

**If you have any trouble using the 'Clients' screen, please follow the above instructions carefully before calling the office on 01482 881510. Please press 1 for the Mortgage Team.**