

Loans Origination 3.4 - Getting Started

This user guide will explain how to get started with the Mutual Vision Loans Origination system. It will cover the fundamentals, from logging in to basic navigation and the different menus available for you to use. The guide is designed to be a step-by-step best practice guide, with activities at the end of each section to help you test your learning.

Home Page

When you are logged in you will see your home page. The home page will help you navigate around and view your workload. If you need to return to the home screen at any point, the Beverley BS Logo in the top left-hand corner will take you back to the home screen. Your home page contains the following headers:

- Cases -> Cases will be the main screen used to navigate the portal. This differs from the current portal, as this is organised more around the cases rather than the clients. This should help brokers to locate their active cases more easily. You can start new cases from this page, and also search for existing cases using a case ID number.
- Clients -> The Clients screen can be used to show or change any information or personal details relating to your customers. All cases and documents are linked to a client, and this can be seen on the clients screen. More information can be found in the 'cases' instruction guide.
- Products -> This screen is very similar to previous versions of the Broker Online system, here you can view information about which products are available, along with basic information about each such as rates, LTV % and associated fees.

If you have any trouble with the Loans Origination portal, please follow the above instructions carefully before calling the office on 01482 881510. Please press 1 for the Mortgage Team.

- Lending Criteria -> This is a link to our website's criteria screen.

A new feature is the 'announcements' button in the top right of the home screen. Here you will see any announcements that may be relevant to you which have been posted by the Beverley.

Application/DIP Page

Each case is made up of a series of stages. When you start working through a case, a status bar will appear at the top of the page. This shows all the stages you need to work through to complete this case. Completed stages show as green. The current stage you are working on shows in blue. Future stages which have not yet been started show in a lighter blue and are greyed out. Stages help you see where you are in the process, and let you know how many more stages you have to go before you can submit the completed application. When completing an application or DIP form, a navigation pane will appear on the left hand side, which lists all steps in the stage. A green tick will appear next to each section once that section is complete.

You can use the stages at the top of the screen, the navigation pane on the left-hand side of the screen or the blue navigation buttons at the bottom of the screen to move forward and backwards through the form, to review or amend any information.

When all steps of all stages have been completed you are ready to submit your application to the Organisation. Hitting the 'Submit Application' button will send the application off for checking. Once submitted, you will be able to download a copy of the application form you submitted.

My Account

The logo in the top right corner with your initials is your 'My Account' button. You can amend your profile, including your name, contact number and job title on this screen. You can also log out of the Loans Origination portal here.

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