0345 241 3079
www.castletrust.co.uk

Broker Portal Guide

See what's changed

September 2019

Castle Trust Bank have been working on a number of updates to enhance the customer experience for our brokers and make dealing with Castle Trust Bank an even smoother experience for you. This guide will walk you through the main features of our Broker Portal. If you need any help at any point, please give us a call on 0345 241 3079 and we will be happy to assist you.

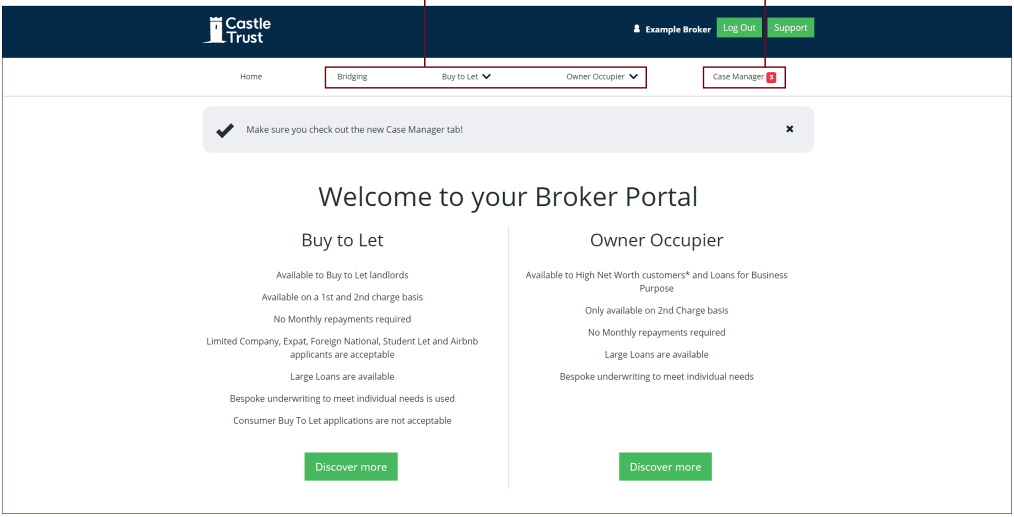
To visit the Broker Portal go to www.castletrust.co.uk/intermediaries and click Log in.

1. Home page

After signing in, you will be taken through to the home page. Here you can submit applications for new cases, check in on existing cases and submit documents that are required.

You can submit applications by clicking on the customer type your client is: Bridging, Buy to Let or Owner Occupier.

To see how your cases are progressing, click here to go through to Case Manager.

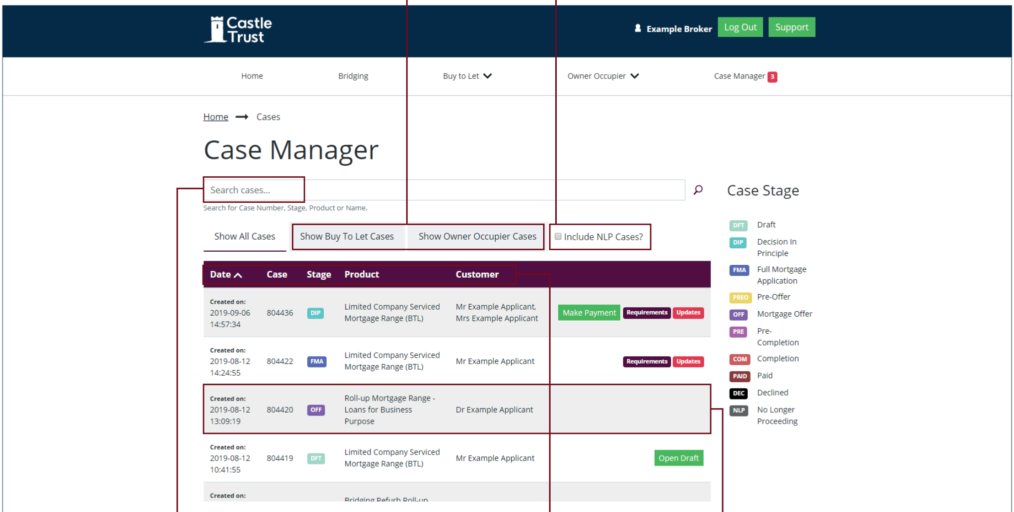


2. Case Manager

Case Manager shows you the high-level status of your cases. Here you can see which cases have requirements outstanding and which cases have new updates from when you last logged in.

You can do a quick filter by product type to show either your Buy to Let and Buy to Let Bridging cases, or your Owner Occupier cases.

Cases that are no longer proceeding will be marked with the case stage NLP. To keep your case manager current, NLP cases are not automatically displayed in this list, but you can choose to include them by clicking this box.



Click on one of your cases to view the details and requirements of the case.

To filter the list, type in their details such as case number, stage, product or name and then press search. If you want to show the full list again, click onto 'Show All Cases'.

You can reorder the list by clicking the table headings to easily sort your cases. By clicking the table heading again, it will reverse the list, helping you to keep on top of where you are with each case.

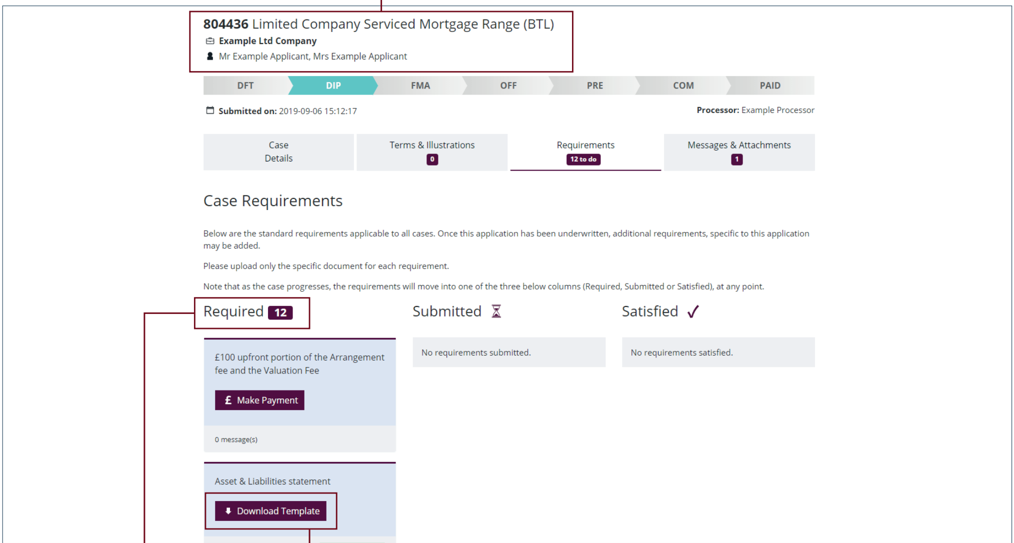
3. Requirements

This area of case manager is the part we're most excited about. Here you can find everything you need to manage your cases and you have instant access to the status of your case whenever you want, even when we're not in the office.

This page will automatically open onto the Requirements tab, this area shows you which requirements have been satisfied and whether there is anything outstanding on your case.

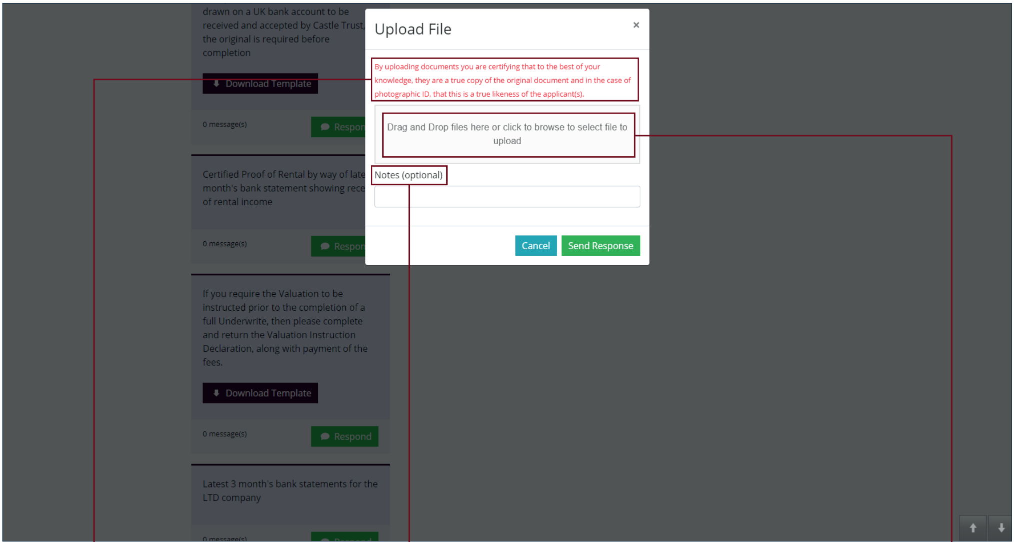
When a newly submitted case has been reviewed by one of our underwriters, they will release the list of requirements onto this page. Requirements are sorted into the three columns: Required, Submitted and Satisfied and these will clearly show you how your case is progressing at a glance.

This basic information will display at the top of every page so you can be sure which case you are working on.



If the requirement needs a template to be completed, it will show a Download template button which opens the requirement in a web page. From here you can save the template to your computer and complete it with the information.

The Required column will display all outstanding requirements. These will move to the Submitted and Satisfied columns as your case progresses.



When you are ready to respond to a requirement, click respond to display this box. You'll notice the red wording at the top – this is a new feature that means you will no longer have to certify each document.

To upload a file, either drag & drop into this area or click the area to open up your folders.

If you wish to add a message for our underwriters along with the requirement, you can do so in the notes field. Then click Send response to submit it.

After you have responded to a requirement, it will move over to the Submitted column where it will be reviewed by a member of our Mortgage Lending Team. If the submission meets the requirement, we will satisfy the requirement and move it over to the Satisfied column. However, if we require more information from you, it will be moved back over to the Required column with a note to explain what is needed.

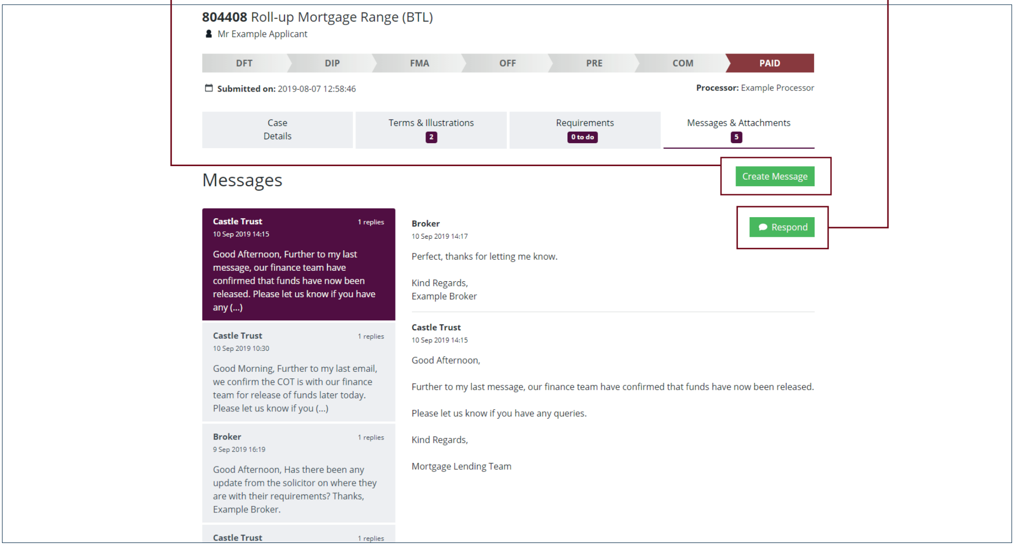
As your case progresses, the requirements will move over to the Satisfied column allowing you to clearly see how far your case is progressing and which requirements remain outstanding.

4. Messages

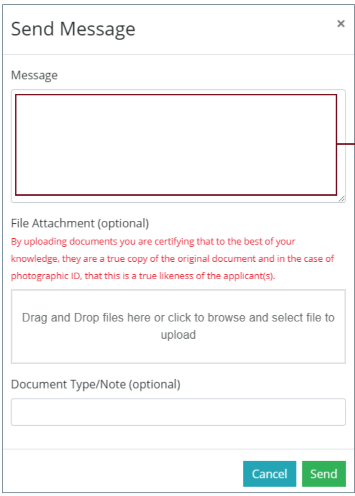
Another feature we're excited to show you is Messages & Attachments. By using the messages feature for all communications between yourself and Castle Trust Bank, you can keep all of your case correspondence in one place, making it easier for you to manage. You'll notice that all messages are time & date stamped and grouped into conversations just like on your smartphone.

Click Create Message to start a new conversation with the Mortgage Lending Team.

You can read and respond to messages by selecting a conversation on the left-hand side and then clicking Respond.



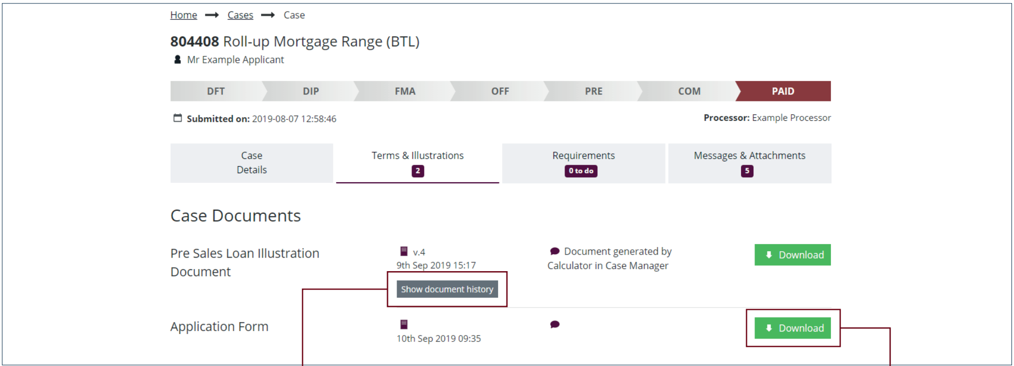
All history conversations will be stored here to keep everything in one place for your audit trail.



You can write your message in the main box here and there's also an option to add an attachment. We've already touched on how to submit required documents using the Requirements tab, but if you have any other relevant documents to submit you can do that here. When you are ready, click Send....

5. Terms & Illustrations

The Terms & Illustrations tab is where your Pre Sales Illustration and application details live.

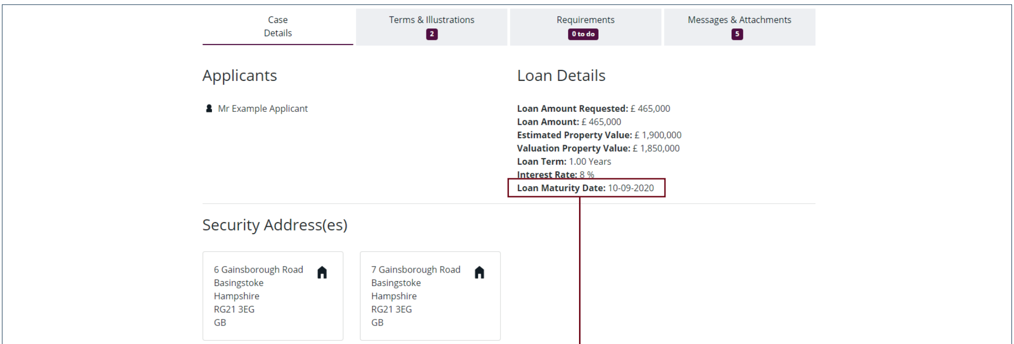


Some documents, such as the Pre Sales Illustration, will have multiple versions based on what you've requested from us; these historical documents will be stored here too and can be expanded using the Show document history button.

If you want to download a copy for your records, you can do so easily using the Download button.

6. Case Details

The Case Details tab shows you the basic case information such as Applicant name, loan details and the addresses of all the securities. If you need to call us about the case, we will use this information to verify your identity.



When the case has reached completion, the Loan Maturity Date will display here.

If you require any help throughout this process, please call the Sales Support team on **0345 241 3079**.