

**Chorley  
Building  
Society**

TRUSTED SINCE 1859



# Broker Online User Guide

**Intermediary Use Only**



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# How to Register

To submit cases using the Online Portal you must firstly register as a Broker.

Registering as a broker is a quick and easy process.

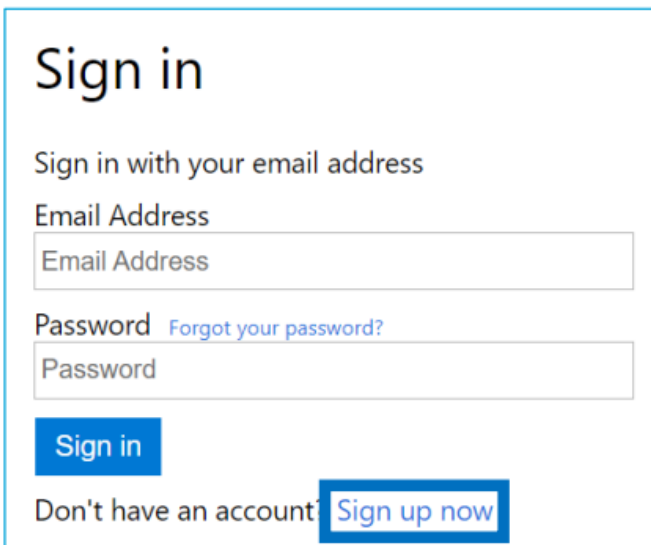
To register you provide your personal details and contact information, together with your broker firm and FCA details so that an account can be created for you. Once registered you can set up clients and submit cases.

You can use this guide to help with the set-up process for a new broker, or to help with re-registering an account that was used on previous versions of the system.

## New Brokers

To register as a new broker you need to access the portal via the [Broker Portal Login](#)

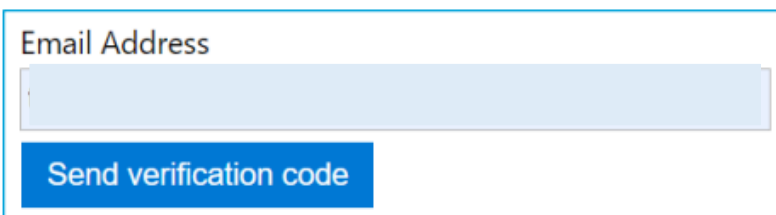
The following will then be displayed and you should click **Sign up now**



The screenshot shows a 'Sign in' form with the following elements:

- Header: 'Sign in'
- Text: 'Sign in with your email address'
- Label: 'Email Address' above a text input field containing 'Email Address'
- Label: 'Password' above a text input field containing 'Password', with a link 'Forgot your password?' to the right.
- Buttons: 'Sign in' (blue) and 'Sign up now' (blue, highlighted with a red box).
- Text: 'Don't have an account:' followed by the 'Sign up now' button.

You will then be required to enter your email address and click **Send verification code**



The screenshot shows a verification page with the following elements:

- Label: 'Email Address' above a text input field.
- Button: 'Send verification code' (blue).

A verification code will then be sent to the email address you have entered. This may take a few minutes to arrive and you may need to also check your spam folder.

## Verify your email address

Thanks for verifying your [redacted] account!

**Your code is: 647579**

Sincerely,  
Loans Origination

The code should then be entered into the relevant box click **Verify code**

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

Verification Code

647579

Verify code

Send new code

Your account will then be confirmed as verified

E-mail address verified. You can now continue.

You will then need to enter a password that you will use to access the portal and click **Create**

New Password

\*\*\*\*\*

Confirm New Password

\*\*\*\*\*

Create

Cancel

The next step is to confirm that you wish to sign in. To do this you will need to request a new code.

Click **Send verification code**

Verification is necessary. Please click Send button.

Email Address

**Send verification code**

**Continue** | **Cancel**

Enter the verification code and click **Verify code**

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

Verification code

**Verify code** | **Send new code**

**Continue** | **Cancel**

You can then continue with the registration process and create your account

## Create Account

To create an account you need to complete the following information and click **Continue**

Title	Miss
First Name	Demo
Surname	Broker
Job Title	Mortgages Adviser
Mobile Number	07900123456
Please select your marketing preferences	
<input checked="" type="checkbox"/>	By Phone
<input type="checkbox"/>	By Email
<input checked="" type="checkbox"/>	By Post
<a href="#">Continue</a>	

Next you need provide information about the firm that you work for

Company Details	
Are you regulated by the FCA?	
<input checked="" type="radio"/>	Yes
<input type="radio"/>	No
FCA Number	908765
Organisation Name	Test Brokerage
Trading As Name	Brokers United
Post code	SK9 1BJ
	<a href="#">Find</a>
Select address	Mutual Vision Technologies Ltd,Unit 7 Millbank House,Bollin Walk,Wilmslow,Cheshire

You will then be provided with a summary of the details you have provided to check and then click **Continue**

### Summary

<b>Personal Details</b> Demo Broker Mortgages Adviser 07900123456	<b>Company Details</b> 908765 Brokers United UNIT 7 MILLBANK HOUSE BOLLIN WALK WILMSLOW SK9 1BJ
--	--

[Edit](#) [Edit](#) [Continue](#)

You will then be provided with the Terms and Conditions for registering which you need to read and accept by clicking **Agree**

### Terms and Conditions

T's and C's would be added here....

[Agree](#)

Once all your details have been completed you can then click **Register**

### Create an account

- Personal Details
- Company Details
- Summary
- Terms and Conditions

T's and C's would be added here....

[Agree](#)

[Register](#)

Your account is now set up and you can proceed to log in and submit applications.

## Existing Brokers – Re-Register

If you have already submitted cases to the Society on the previous version of the Broker Portal your existing account will still be valid but you will need to re-register.

To do this you should access the portal via the [Broker Portal Login](#)

The following will then be displayed and you should click **Sign up now**

### Sign in

Sign in with your email address

Email Address

Password [Forgot your password?](#)

**Sign in**

Don't have an account **Sign up now**

You will then be required to enter your email address and click **Send verification code**

Email Address

**Send verification code**

A verification code will then be sent to the email address you have entered, this may take a few minutes to arrive. Please also check your spam folder.

### Verify your email address

Thanks for verifying your  account!

**Your code is: 647579**

Sincerely,  
*Loans Origination*

The code should then be entered into the relevant box then click **Verify code**



Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

Verification Code

[Verify code](#) [Send new code](#)

Your account will then be confirmed as verified

E-mail address verified. You can now continue.

You will then need to enter a password that you will use to access the portal and click **Create**

New Password

Confirm New Password

[Create](#) [Cancel](#)

The system will then check that your email address is associated with any other accounts on the system either with the Society or other lenders that use the same service.

### **Already Registered**

If you have an existing account you will then be re-directed to the **Your Cases** screen where you will see any existing clients and ongoing cases.

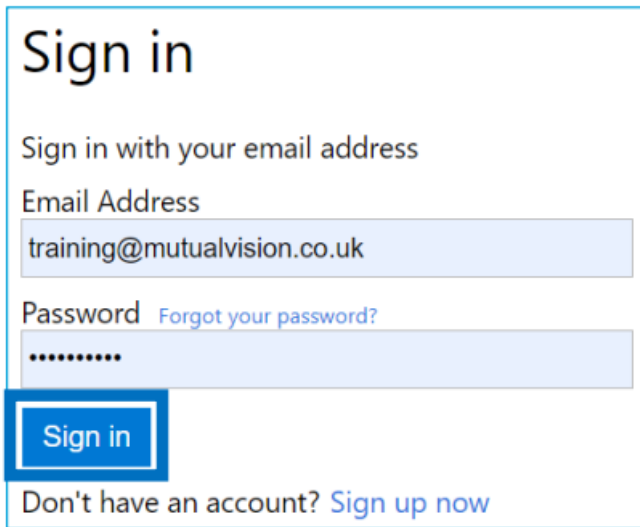
### **Not Registered**

If an existing account is not identified you will be directed to the portal to enter your personal information, your company details and regulated status.

To do this please follow the guidance in the section **Create Account**

# Logging In

To login you should access the portal via the [Broker Portal Login](#) and enter your email address and password then click **Sign in**



The screenshot shows a 'Sign in' form with the following elements:

- Title: Sign in
- Instruction: Sign in with your email address
- Field: Email Address (containing training@mutualvision.co.uk)
- Field: Password (masked with dots) with a link for 'Forgot your password?'
- Button: Sign in
- Text: Don't have an account? [Sign up now](#)

You will then need to enter a 2 factor (2FA) code which will be sent to your email address to access your account. To obtain this you should click **Send verification code**



The screenshot shows a 'User Details' page with the following elements:

- Title: User Details
- Text: Verification is necessary. Please click Send button.
- Field: Email Address (masked with asterisks, ending in .co.uk)
- Button: Send verification code
- Buttons: Continue and Cancel

An email will then be sent to your registered email address with the 2FA code



The screenshot shows an email verification page with the following elements:

- Title: Verify your email address
- Text: Thanks for verifying your [masked email] account!
- Text: Your code is: 358993
- Text: Sincerely, Loans Origination

This code should be entered then click **Verify code**

## User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

\*\*\*\*\*@\*\*\*\*\*.co.uk

Verification code

358993

Verify code

Send new code

Continue

Cancel

Then click **Continue**

## User Details

E-mail address verified. You can now continue.

Email Address

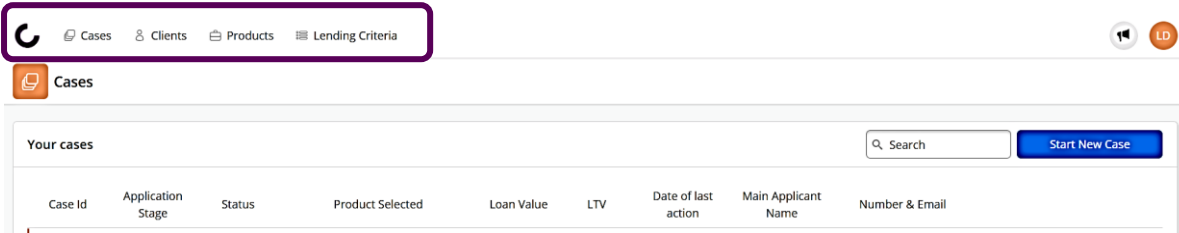
\*\*\*\*\*@\*\*\*\*\*.co.uk

Continue

Cancel

# Basic Navigation

Once logged in you will see your **Home Page** which is where you can navigate to your clients information, your cases as well as access useful information about the Society's Mortgage Products and Lending Criteria.



## Cases

This is where you can access any cases that you are currently working on as well as start a new case. You can also search for pre-existing cases using a unique case ID number.

## Clients

This is where you will create new clients and can access and update existing client information.

## Products

Here you will find basic information about our Mortgage Products including the rates, loan to value percentage and associated fees.

## Lending Criteria

Here you can access a link to our website criteria page.

## Announcements

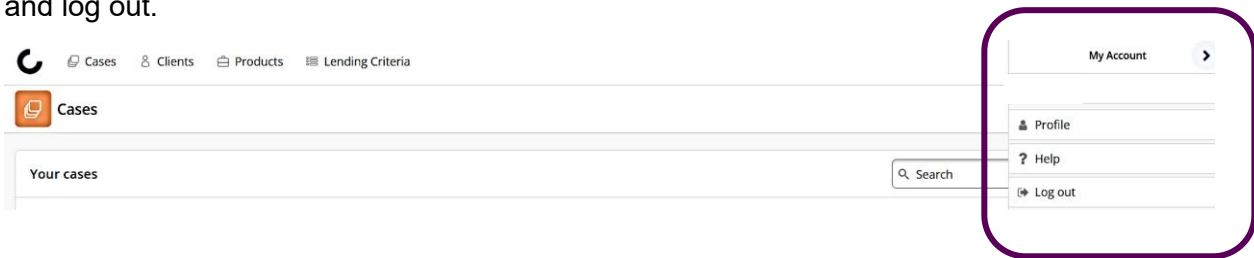


Here you may see any Society updates.

## My Account



This is where you can update your profile information such as your job title or contact information, get help and log out.



## Your cases

This section of the **Home Page** shows and gives you access to cases you are actively working on. You can also start new cases from here. Each case has a unique case ID.

You can also search for a client using the search functionality using their details or the case ID.

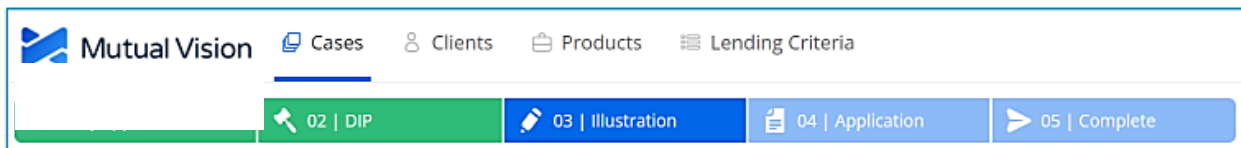
To access a current case click on **View**

Case Id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email	
6996	DIP	Active		200,000.00	57.14	07/08/2024			<a href="#">Continue</a> <a href="#">View</a>
6995	Application	Submitted	DMS 2 Year Discount 95% LTV (20% OMV Discount) - IP223	150,000.00	60	07/08/2024			<a href="#">View</a>
6994	Application	Submitted	2 Year Discount 95% - IP209	250,000.00	50	07/08/2024			<a href="#">View</a>
6992	Application	Submitted	Buy to Let 2 Year Discount 60% - IP213	150,000.00	60	06/08/2024			<a href="#">View</a>
6991	DIP	Cancelled		0.00	0	06/08/2024			<a href="#">View</a>

## Navigating Cases

When you click on a current case you will see that each case is made up of a series of stages.

As you work through a case, a status bar will appear at the top of the page. This shows the stages required to complete the case.



### Stage Status

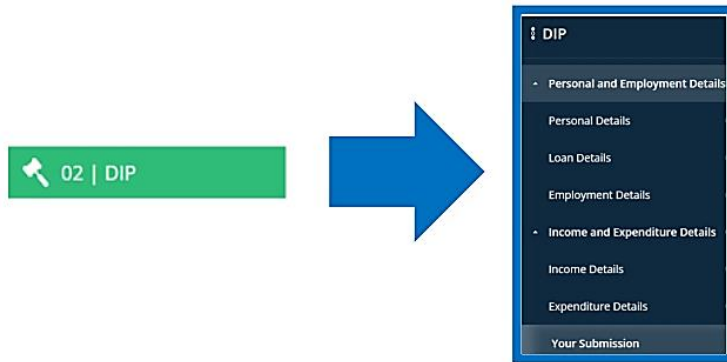
Completed stages show as **GREEN**

The Current stage that you are working on shows as **BLUE**

Future stages show in a lighter **BLUE** and are greyed out

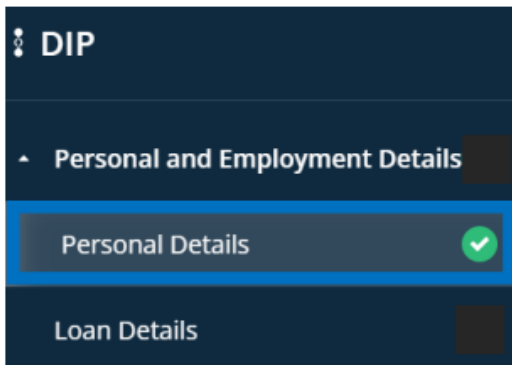
Within each stage there a number of steps to complete for each applicant. When you start to work through a case stage you will see a navigation pane appear on the left-hand side of the screen.

This will list all steps to be completed and clicking on a step will show the information that needs to be completed.



As you work through and complete a step, you can move to the next in the process by clicking the button in the bottom right-hand corner of the screen.

Providing all mandatory fields have been completed, this will then update the step in the navigation pane with a green tick next to it.



You can then complete the next step.

You will need to have green ticks against each section in the navigation pane.

Once all steps in each stage are completed the status strip will update accordingly.

## Navigation of the Steps

There may be occasions when you want to go back a step and update information. To do this you can use the navigation button at the bottom left-hand side of the screen.

Jane Smith (Main Applicant)

Type of Employment

Employed Self Employed Retired

Personal Details Loan Details

There may also be occasions when you want to go back a stage – for example to download documents or update information.

You can use the stage navigation buttons at the top of the screen to do this.

Mutual Vision Cases Clients Products Lending Criteria

01 | Applicants 02 | DIP 03 | Application 04 | Illustration 05 | Complete

Application

Property Details ✓

Personal Details ✓

Initial Questions ✓

Personal Details ✓

Employment Details

Jane Smith (Main Applicant)

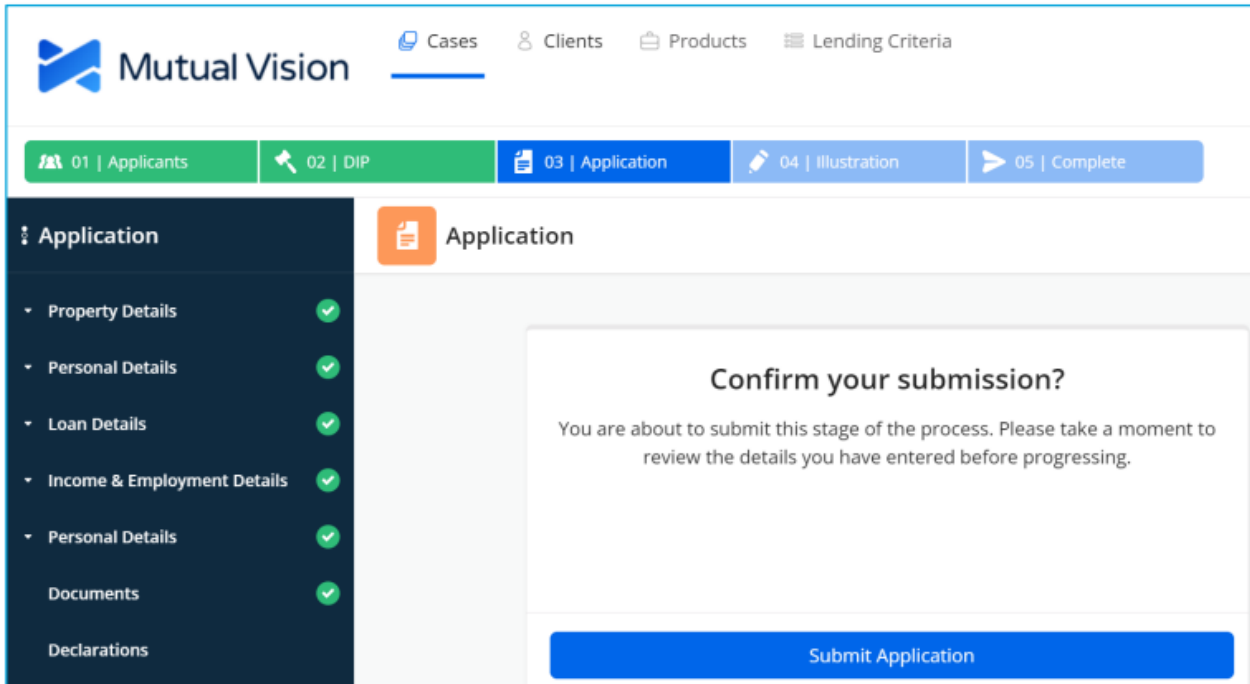
Type of Employment

Employed Self Employed Retired

## Submit an Application

When all steps of all stages have been completed you can submit your application.

Click the **Submit Application** button which will send the application to the Society for review.

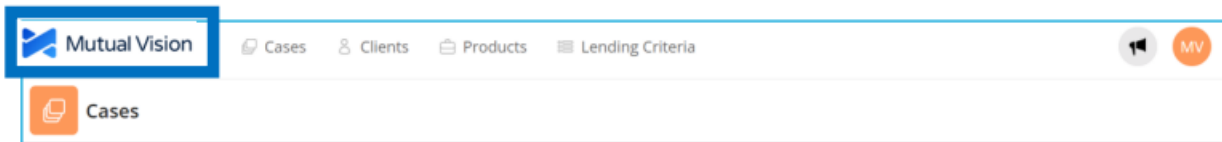


Once submitted you are able to download a copy of the application form which can then either be printed or saved.

## Download Application Form



To get back to the Home Page at any point simply click on the Chorley Building Society logo in the top left-hand corner of the screen.





# Logging Out

To log out click on the **My Account** button and click **Log out**

