



**Digital Mortgages**  
by Atom bank






# Welcome to the broker portal guide

Designed to give you greater control, knowledge and speed

# Real time updates at the touch of a button.

## What's in the Broker Portal?

The portal has been built with self-service in mind. This means you can log-in to check the progress of your mortgage cases at any time.

01. **Case Information**   
How to see an overview of a case
02. **Actions**   
How to check any actions that need progressing
03. **Alerts**   
How to see alerts on cases
04. **Tracking**   
How to track a case
05. **Useful Information**   
Other useful sections in the portal

# 01. Case Information

You can review each case from the portal homepage.

The screenshot shows a mortgage case information card. On the left, there is a customer profile section with a person icon, the text 'Customer Name', 'Full Mortgage Application', and a case ID 'Z5361694'. On the right, there is a summary section with three tabs: 'Actions' (5), 'Alerts' (1), and 'Tracking'. Below the tabs is a list of items: 'Proof of projected retirement income (xx)', 'Proof of Mortgage Payment History (xxx)', and 'Most recent payslip (Proof required from)'. To the right of this list, there is a truncated list of items: 'Customer Name', 'Customer Name', and 'n income employment for Customer Name'. A 'See more' link is at the bottom right of the summary section. Dotted lines connect the annotations below to specific elements in the screenshot.

Applicants name/s


Mortgage case ID




Stage the mortgage is at

A Pink notification indicates you need to do something

## 02. Actions

Use the actions tab to review what you need to do on a case. Typically the actions will refer to documents you need to upload.

 Customer Name  
Full Mortgage Application  
Z5361694

 Actions **5**     Alerts **1**     Tracking

- Proof of projected retirement income (xxx) for Customer Name
- Proof of Mortgage Payment History (xxx) for Customer Name
- Most recent payslip (Proof required from main income employment for Customer Name)

[See more](#)

The 3 most recent actions are displayed in this tab

Click '[see more](#)' to view all available actions

## 03. Alerts

Use the alerts tab to review important information about a case.

The screenshot shows a user interface for a customer case. On the left, there is a profile section with a person icon, the text "Customer Name", "Decision in Principle", and the ID "Z5361694". To the right, there are three tabs: "Actions" with a notification badge of 5, "Alerts" with a notification badge of 1, and "Tracking" with a checkmark icon. The "Alerts" tab is active, displaying a list of alerts. The first alert is "Decision in Principle has exp". At the bottom right of the alerts list, there is a "See more" link. Red dotted lines connect the "Alerts" tab and the "See more" link to explanatory text below the screenshot.

The 3 most recent alerts are displayed in this tab

Click '[see more](#)' to view all available alerts

# 04. Tracking

Use the tracking tab to get a snapshot of what has happened recently on a case.

The screenshot shows a user interface for tracking a mortgage application. On the left, there is a customer profile section with a person icon, the text 'Customer Name', 'Full Mortgage Application', and the ID 'Z5361694'. To the right is a tracking panel with three tabs: 'Actions' (5 items), 'Alerts' (1 item), and 'Tracking' (selected). The 'Tracking' tab displays a list of three actions, each with a timestamp and a description. A 'See more' link is at the bottom right of the list. Dotted lines connect the 'See more' link to a callout box and the first action item to another callout box.

Actions (5)	Alerts (1)	Tracking
<ul style="list-style-type: none"><li>13/03/2017 - 09:36 - Grea in the customers app.</li><li>13/03/2017 - 09:36 - Coul our decision.</li><li>13/03/2017 - 09:36 - Coul progress our decision.</li></ul>		<ul style="list-style-type: none"><li>vs, this DIP has passed our criteria. We've put a copy</li><li>please send us Proof of Projected income to progress</li><li>please send us Proof of Mortgage Payment History to</li></ul> <p><a href="#">See more</a></p>

The most recent activity is displayed in this tab

Click 'see more' to view all activity

# 05. Useful Information

The portal has been designed to give you greater control, knowledge and speed. Within the portal you can:



Create a new case



Attach and upload documents



Produce a new illustration document



Cancel a case



Download case documents



Filter your cases using the options in the Quick Links section

# Need some help?

Enjoy greater control, knowledge and speed with your Digital Mortgages portal. If you have any further queries, get in touch.

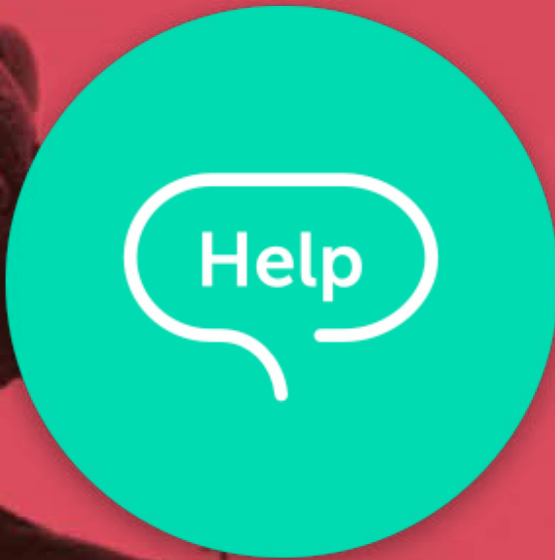
For Intermediary support:

Email [support@digitalmortgages.net](mailto:support@digitalmortgages.net)

For existing applications:

Email [mortgageprocessing@digitalmortgages.net](mailto:mortgageprocessing@digitalmortgages.net)

Call **0333 399 0055** - press 1 for existing applications, otherwise please hold for intermediary support.



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A broker guide [digitalmortgages.net](https://digitalmortgages.net)

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