# Intermediary Online User Guide

This guide tells you everything you need to know about using your Intermediary Online platform.

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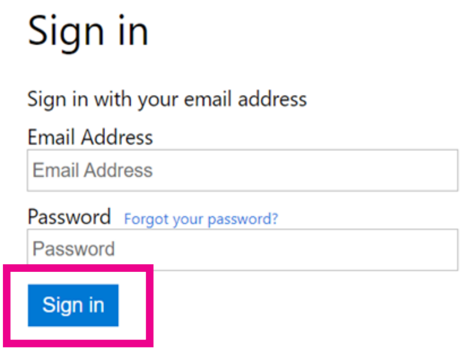
**How to log in**

Visit Intermediary Online at www.marsdenintermediariesonline.co.uk and enter your details to log in.




**Having problems logging in?**

**Check your Internet browser**

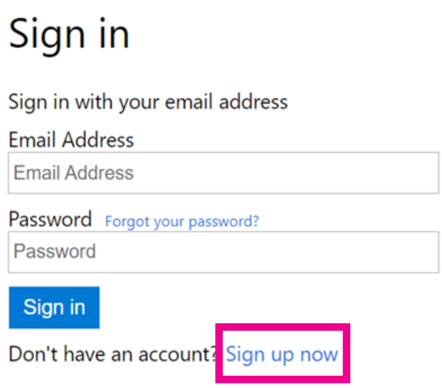
Intermediary Online is only compatible with Firefox, Internet Explorer (IE) 11 or Google Chrome. If you're not sure what version of Internet Explorer you're using, click on 'Settings' and select 'About Internet Explorer' where you'll be able to find out which version you're using and will confirm whether you need to upgrade your browser.

**Still having problems?**

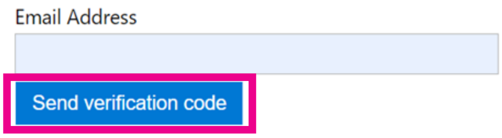
Get in touch with our Intermediary Support Team on 01282 440583* or email intermediaries@themarsden.co.uk.

**Registering an account**

If it's your first time using the upgraded Intermediary Online platform, then you'll need to register. Click 'Sign up now' to register for an account.

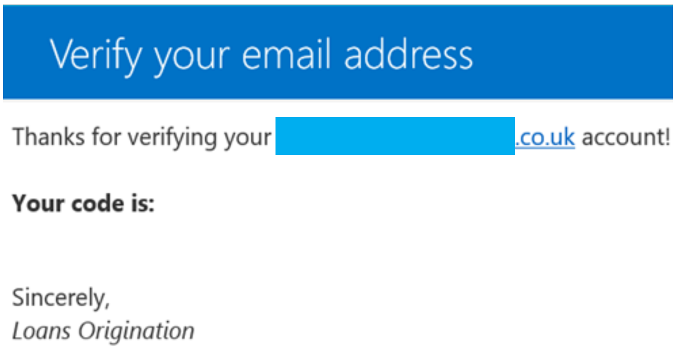


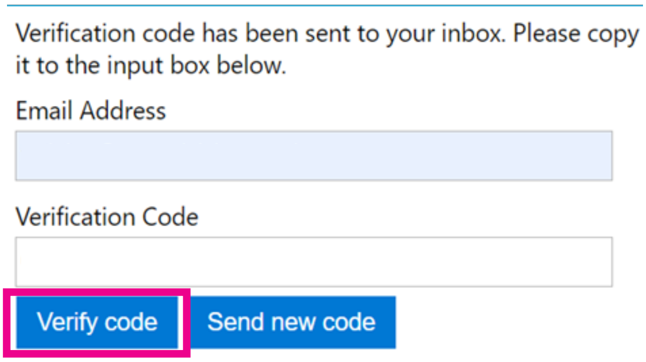

Once you've clicked 'Sign up now', you'll need to enter your email address, then click 'Send verification code'.



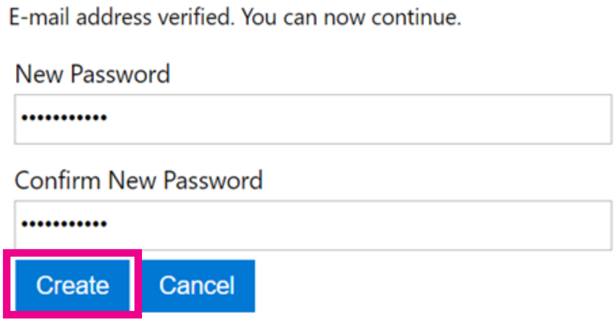

A verification code will then be sent to the email address you've entered above to make sure it's valid. The email may take a few minutes to arrive. If you haven't received it after a few minutes, check your spam or junk folders.

Once you've received your verification code, return to the log in screen to enter the code, then click 'Verify code'.

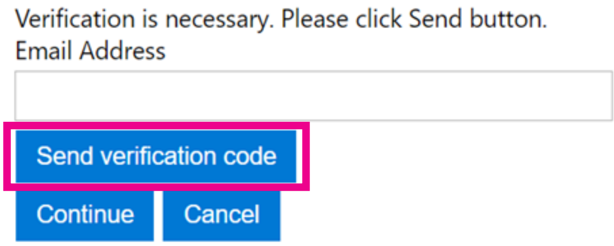


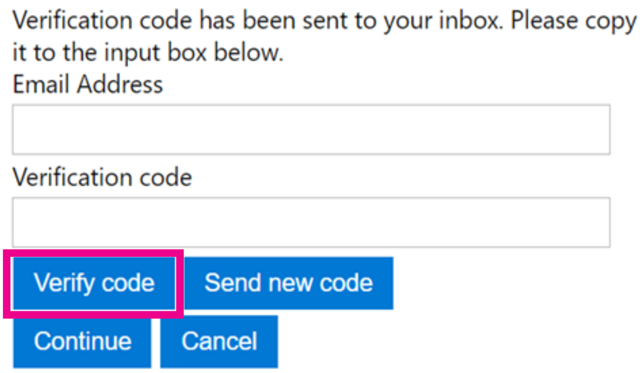

Once your account has been verified, you'll need to enter a password to access the platform in future.



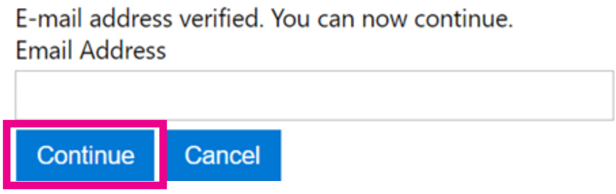

You'll then be asked to verify that you want to log in. Click 'Send verification code'.




Enter the verification code and click 'Verify code'.

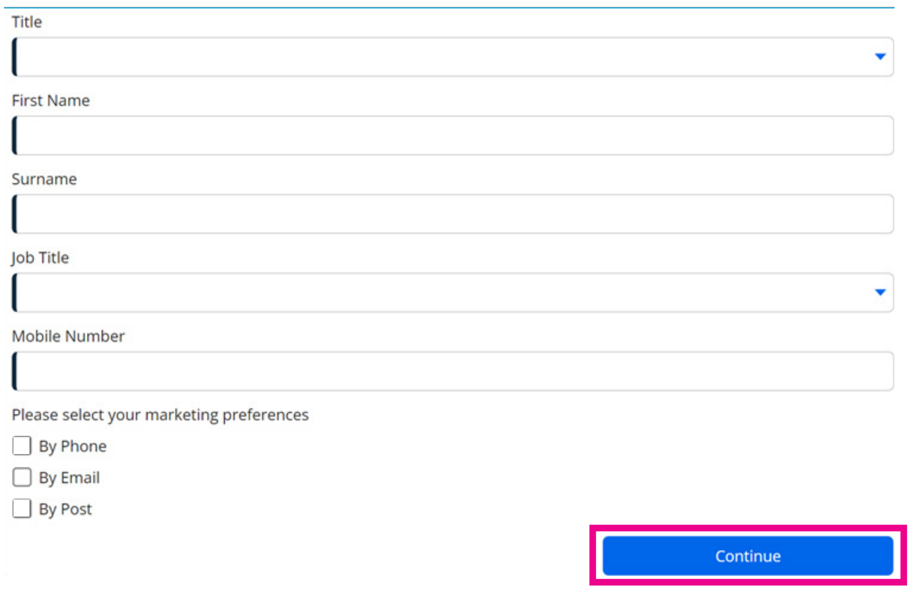



You can then continue with the registration. Click 'Continue'.

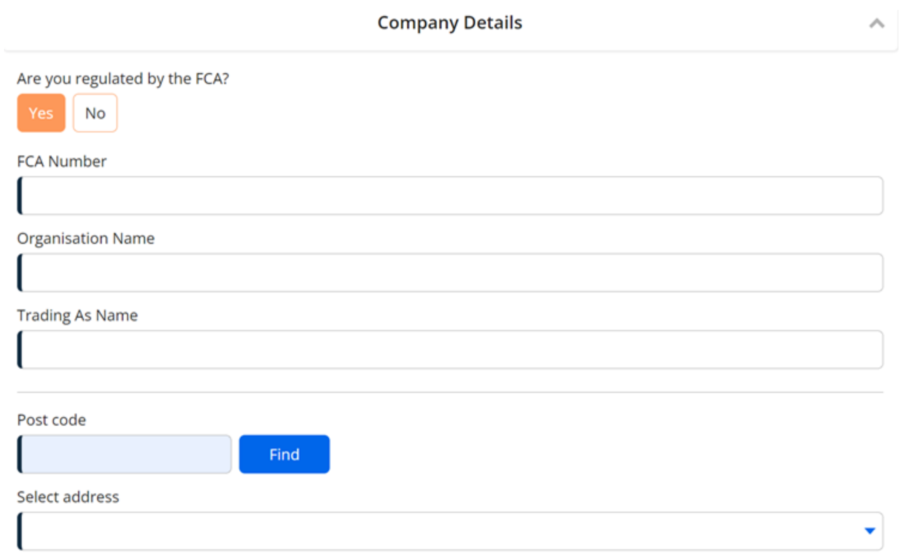


### Creating an account (new users only)

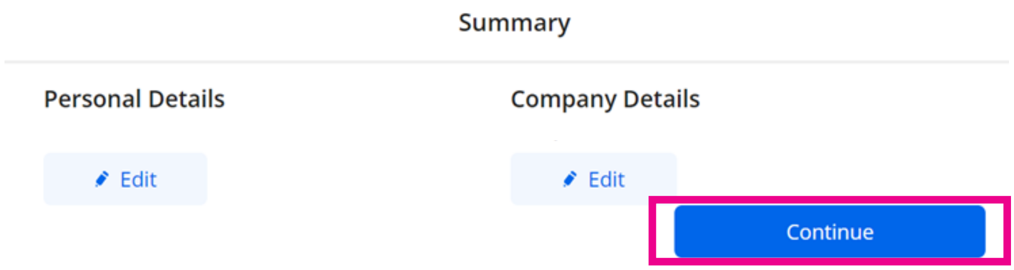
To create an account, you'll need to enter details about yourself. Click 'Continue'.



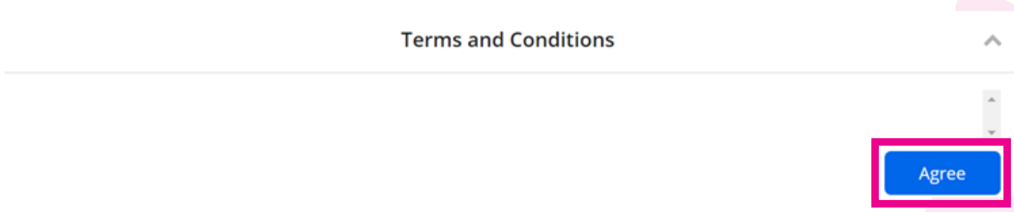

Enter details about your company and click 'Continue'.




Check your details and correct, then click 'Continue'.



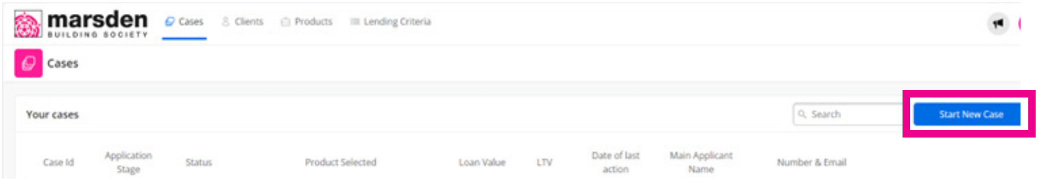

Read the Terms and Conditions, then click 'Agree'.

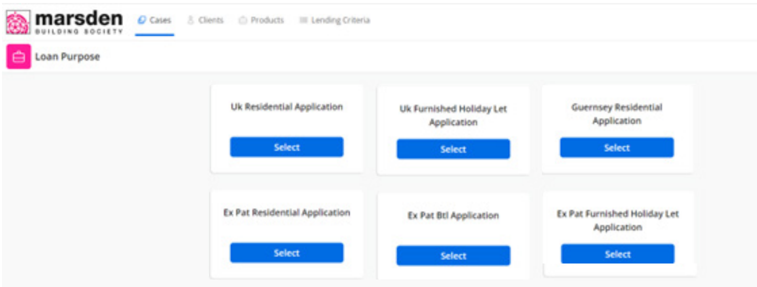



Once all details have been added, clicking 'Register' will complete your account set up.

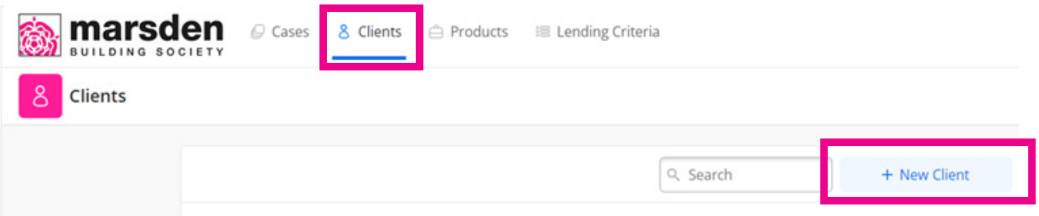
**Creating a client**

To create a client, you need to start a new case first. Click 'Start New Case' and select the relevant Loan Purpose.

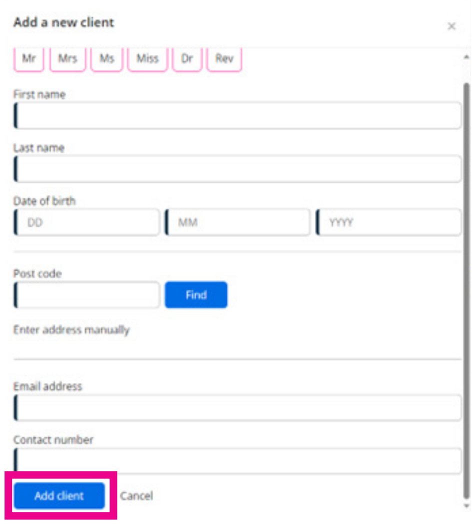


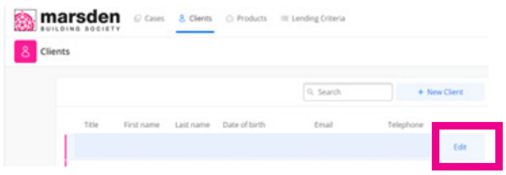

Once you've logged in, you'll see your 'Clients' page. This is where you will find a list of your current and previous clients. Click 'New Client' to create a client.



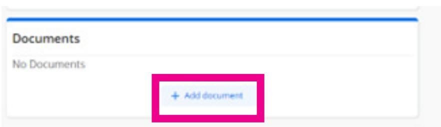

Enter your client's information and select 'Add client'.
Please note: If you're creating a joint application, the first client that you create will be the main applicant. You'll then need to click on 'Add client' to enter the second client's details.




You can edit any of your clients' details by clicking on 'Edit' next to the client on the 'Clients' page.

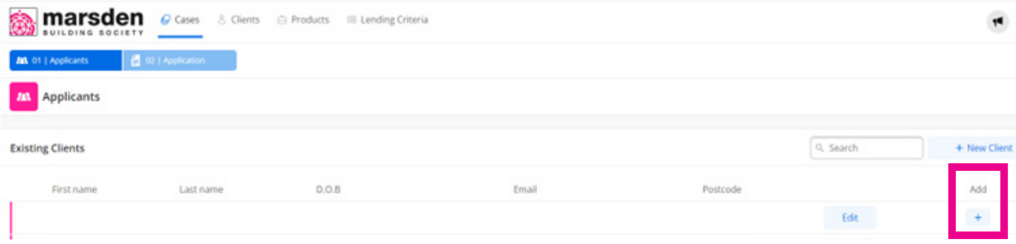



Once you've saved your client's details, you can then upload documents.

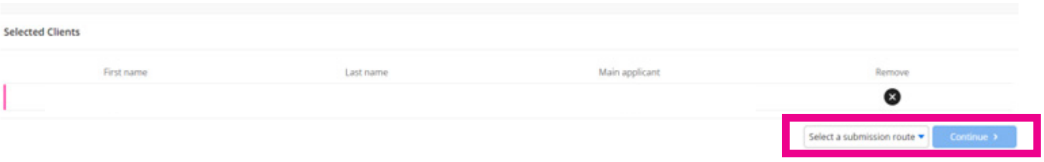


### Creating an application

The 'Cases' page is where you'll find a list of your current and previous clients.
Once a client has been set up, you're able to add an application for them by clicking on the 'Add' button.
If it's a joint application, click add for all applicants.



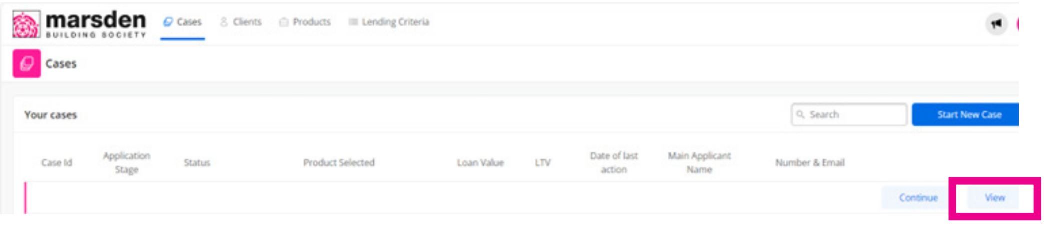

Pick the submission route at the bottom and click 'Continue'.

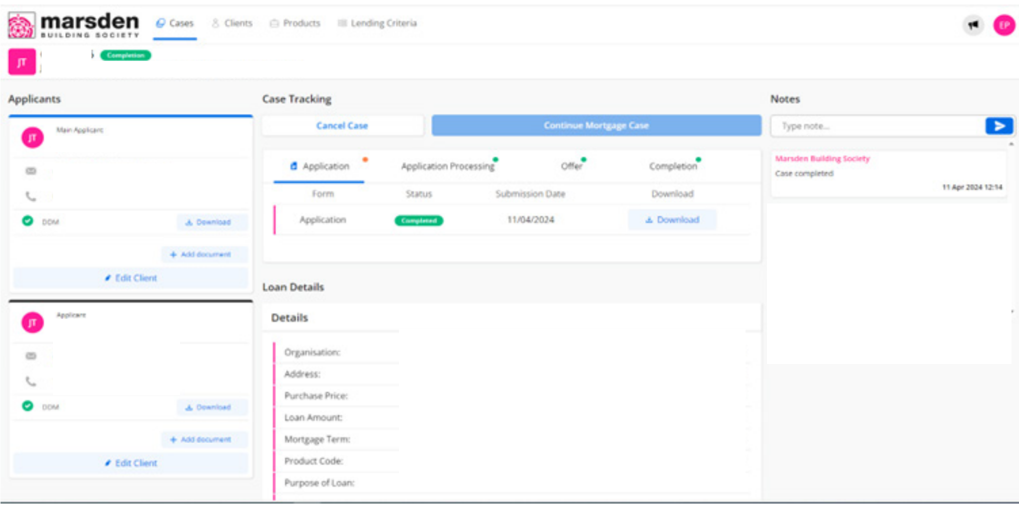



You'll then be taken through to our application form where you can track the progress of your application throughout submission.
If you wish to pause whilst keying, click the 'Cases' tab and you'll be returned to the start page. If you then wish to continue with an application, click the 'Continue' tab and you'll be returned to where you left off.

### Uploading documents

Click 'View' to upload further documentation, add notes, view notes, download the application form and offer, cancel the case or check the status (case tracking) of the case.



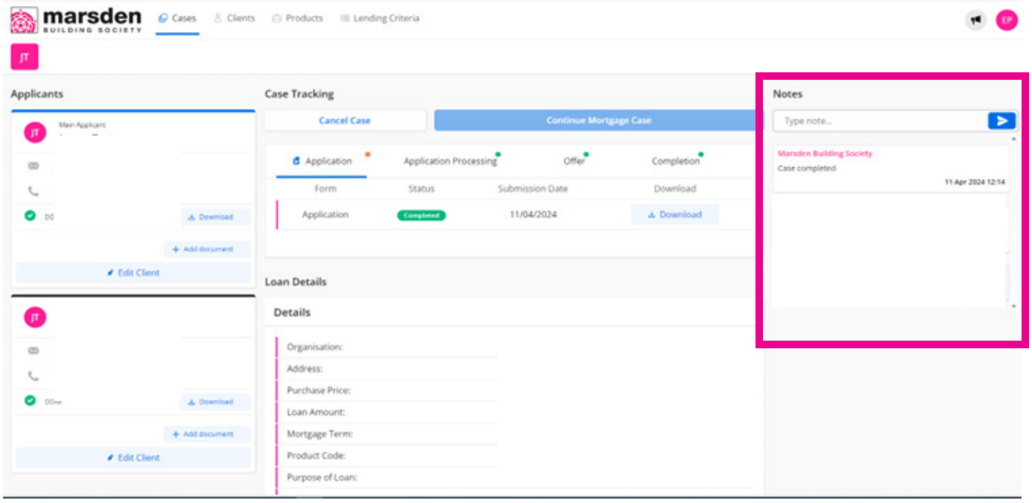

To support your client's application, you'll need to upload supporting documents.
In this section you can upload a copy of:

- Signed Customer Declaration and Direct Debit Mandate
- Proof of ID/ Residency
- Miscellaneous documents which will support your application using our documentation checklists for your reference

Please note: There's no limit to the amount of uploads you can process, however, individual documents cannot be over 4MB and need to be uploaded as JPEG, PNG or PDF only.

**Adding notes to your client's file**

If there's anything our underwriting team need to be aware of, please add them to your client's notes. This will also be where you can find any notes our Intermediary and Underwriting Teams add in reference to your client or application. Each time there are notes added by our team you'll receive a notification to your email address.




## Frequently Asked Questions

**What happens if I don't have all the supporting documents uploaded?**

All applications must have all the relevant supporting documents before they can be considered by our Intermediary Team. If there are any documents missing, we'll let you know via the 'Notes' section of the platform what is still outstanding.

**What should I do if I am having trouble completing or submitting the application?**

Get in touch with our Intermediary Team on 01282 440583 or email intermediaries@themarsden.co.uk.

**What should I do if I've forgotten my password?**

You can reset your password on the login screen. Click 'Forgot your Password' and you'll receive an email to reset your password.

**What if I am part way through keying the application and I am logged out unexpectedly? Will all my work be lost and will I have to start keying the application again?**

No, once your client is set up and you are keying an application you can log in and out freely and all your work will be saved. If you're logged out unexpectedly, the system will revert to where you were up to at that time. Please be aware that for security purposes, the system will automatically time you out after 60 minutes and you'll then have to log back in.

**There's a mandatory field that doesn't apply to my client, what should I input?**

Mandatory fields are put in place to ensure that we're getting as much information as possible, although we appreciate that your client's details/circumstances may be different. In these instances, please input the most accurate information (i.e. 'N/A' or '0.00', or contact our Intermediary Team on 01282 440583 if you're not sure.

**Why have I not received any email notifications?**

You'll receive an email notification at each stage of the process, from submitting an application and it being received, to when you have notes added to your client's application. The emails will be sent from intermediaries@themarsden.co.uk, if you don't receive an email, please check your spam or junk folder.

**What if my Network/ Mortgage Club is not listed?**

Please select 'Other' to proceed with your registration. When you submit a mortgage application for Appointed Representatives, we'll obtain your network details from the FCA register and update your details. For Directly Authorised intermediaries, we'll collect your mortgage club details during the application process and arrange to update your details.

**What if I need to change my registration details?**

Please email intermediaries@themarsden.co.uk with the changes and we'll verify the information and update your registration details accordingly. We'll confirm by email when this is done. If you're having any problems, please get in touch with our Intermediary Team and we'll look into this for you.

marsden BUILDING SOCIETY

01282 440583* intermediaries@themarsden.co.uk www.themarsden.co.uk/intermediaries