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.

Sign in

Sign in with your email address

Email Addr	ess
Email Addr	ess
Password	Forgot your password?
Password	
Sign in	

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.

Sign in

Sign in with your email address

Email Address
Email Address
Password Forgot your password?
Password
Sign in
Don't have an account? Sign up now

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

Email Address

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.

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.

Intermediary Online

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

Verify your email address	Verification code has been sent to your inbox. Please copy it to the input box below.
Thanks for verifying your	Email Address
Your code is:	Verification Code
Sincerely, Loans Origination	Verify code Send new code

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

E-mail address verified. You can now continue.

New Passw	ord
•••••	
Confirm Ne	ew Password
•••••	
Create	Cancel

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

Verification is necessary. Please click Send button.

Email Address	S	
Send verific	cation code	
Continue	Cancel	-

Enter the verification code and click 'Verify code'.

Verification co it to the input Email Address	ode has bee box below	en sent to yo /.	ur inbox. Please copy
Verification co	ode		
Verify code	Send r	new code	
Continue	Cancel		

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

E-mail address verified. You can now continue. Email Address



Creating an account (new users only)

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

Title	
	•
First Name	
Surname	
Job Title	
	•
Mobile Number	
Please select your marketing preferences	
By Phone	
By Email	
By Post	
	Continue

Enter details about your company and click 'Continue'.

	^
re you regulated by the FCA? Yes No	
CA Number	
rganisation Name	
ading As Name	
ost code	
Find	
elect address	
	•

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

Summary

Personal Details	Company Details	
🖋 Edit	🖋 Edit	Continue
Read the Terms and Condition	ns, then click 'Agree'.	
	Terms and Conditions	^
		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.

	es 🔱 Clients 💮 Products 💷 Le	nding Criteria			
Cases					
Your cases				Q. Search	itart New Case
Case Id Application St	atus Product Selected	d Loan Value	LTV Date of last Main Applicant action Name	Number & Email	
maradan					
	Clients Products III Lending Criteria				
Loan Purpose					
	Uk Residential Application	Uk Furnished Holiday Let	Guernsey Residential		
	Select	Application	Application		
	Ex Pat Residential Application	Ex Pat Btl Application	Ex Pat Furnished Holiday Let		
			A N N		

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.

BUILDING SOCIETY	8 Clients 🖨 Products	🗟 Lending Criteria	
8 Clients			
		Q. Search	+ New 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.

Add a new client	You ca × on 'Edi
Mr Mrs Ms Miss Dr Rev	a mars
First name	
	8 Clients
Last name	
Date of birth	
DD MM YYYY	
Post code	
Find	
Enter address manually	
Emailaddraes	
Contact number	
Add client Cancel	

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

Client	ts						
					9, Search	+ N	w Client
	Title	First name	Last name	Date of birth	Email	Telephone	_
							Edit

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

Documents		
No Documents		
	+ Add document	



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.

marsder	Grases & Clients	Products III Lending Criteri	ia			•
Aut. 01 Applicants	02 Application					
Applicants						
Existing Clients					Q, Search	+ New Client
First name	Last name	D.O.B	Email	Postcode		Add
					Edit	+

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

Selected Clients				
	First name	Last name	Main applicant	Remove
				0
				Select a submission route 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.

BUILDING BOCIETY	s 💩 Clients 😑 Products 💷 Lendi	ng Criteria				•
Cases						
Your cases					Q, Search	Start New Case
Case Id Application Stage Stage	tus Product Selected	Loan Value	LTV Date of I action	last Main Applicant Name	Number & Email	
						Continue View
	8 Clients	Criteria				•
Applicants	Case Tracking				Notes	
Main Applicanc	Cancel Case		Continue Mortgage	Case	Type note	
	d Application	Application Processing	Offer	Completion	Marsden Building Society Case completed	
6	Form	Status Subr	nission Date	Download		11 Apr 2024 12:14
O DOM 🔥	Download Application	Completed 11	/04/2024	& Download		
+ A00	Socurrent					
🗶 Edit Client	Loan Details					
Appleare	Details					
	Organisation:					
6	Address:					
🗢 DDM 🔺	Purchase Price:					
+ 400	Mortgage Term:					
✓ Edit Client	Product Code:					
	Purpose of Loan:					

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.

🚵 marsde	Cases & Clien	ts 😑 Products 💷 Lending C	riteria				
π							
Applicants		Case Tracking				Notes	
Main Applicant		Cancel Case		Continue Mortga	ige Case	Type note	>
		d Application	Application Processing	Offer	Completion	Manuden Building Society Case completed	
6		Form	Status Sub	mission Date	Download		11 Apr 2024 12:14
O 00	& Dewnload	Application	Completed	1/04/2024	▲ Download		1
	+ Add document						1
*	Edit Client	Loan Details					
0		Details					
8		Organisation:					
c		Address:					
O D0	& Deanload	Purchase Price:					
		Loan Amount:					
	+ Add document	Mortgage Term:					
	Edit Client	Product Code:					
		Purpose of Loan:					

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.



01282 440583* 🛛 🞯 intermediaries@themarsden.co.uk

www.themarsden.co.uk/intermediaries

Marsden Building Society is a member of the Building Societies Association. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, under registration number 206050. Principal Office, 6-20 Russell Street, Nelson, Lancashire BB9 7NJ. *Calls will be recorded and may be monitored. FP195219