

TMW Online - Scan and Attach Guide the mortgage works common sense lending

For Intermediary Use Only

My Cases
Search Filters

TMW Online Case ID: Activate Case ID: Created Date: Client(s): Status: Security Address:

Case List Denotes there is an outstanding action required from you in order to progress the case.

Id	Created Date	Customer Names	Status	Security Address	Actions
JUN1810336	2016-06-23 10:02		Application Pre-Submission		<input type="button" value="+Open"/> <input type="button" value="+Cancel"/> <input type="button" value="+Close"/>
15229476	2016-05-16 14:08		Application Declined		<input type="button" value="+Open"/> <input type="button" value="+Close"/>
15106261	2016-03-03 12:26		Offer Issued		<input type="button" value="+Open"/> <input type="button" value="+Close"/>
15029305	2016-02-11 16:22		Application Submitted		<input type="button" value="+Open"/> <input type="button" value="+Close"/> <input type="button" value="!"/>
15164450	2016-04-13 12:57		Application Under Assessment		<input type="button" value="+Open"/> <input type="button" value="+Close"/>
14961738	2016-01-20 14:29		Application Submitted		<input type="button" value="+Open"/> <input type="button" value="+Close"/>

On the 'My Cases' screen you'll see an exclamation mark which denotes information is required to progress your client's case.

12:49 Tuesday 21st June 2016
This website is for use by professional intermediaries only
Help Save Home Change Password Log Off

Application Reference:

Decision In Principle: Outstanding Case Requirements Status: Application Under Assessment

Application Form:

Case Summary:

Case Activity:

Outstanding Case Requirements:

Valuation Activity:

Documents:

Case Alert Options:

KPI:

Outstanding Case Requirements

Application Ref:

Applicant 1:

Applicant 2: N/A

Product: 5 Year Fixed Rate with £995 Arrangement Fee, Free Valuation and £150 Application Fee

Security:

Outstanding Requirements

Outstanding Case Requirements Help Text Placeholder

Name	Description	Additional Notes	Date Added
Property schedule	Awaiting property schedule	lpaper15840 L18	21/06/2016 12:24:02

You'll be able to attach one or more scanned documents to a requirement, eliminating the need to email or fax proofs.

In this example, you can tick the select box for 'Property Schedule' and attach the relevant information by selecting;

Online Response to Case Requirements

To upload a document, please select Browse and choose the file you require.

Please note, if you have selected more than one requirement, you will be limited to only one file to upload.

Please ensure any 16 digit card numbers are hidden before uploading any documents or entering comments

Browse to the document(s) you intend to upload

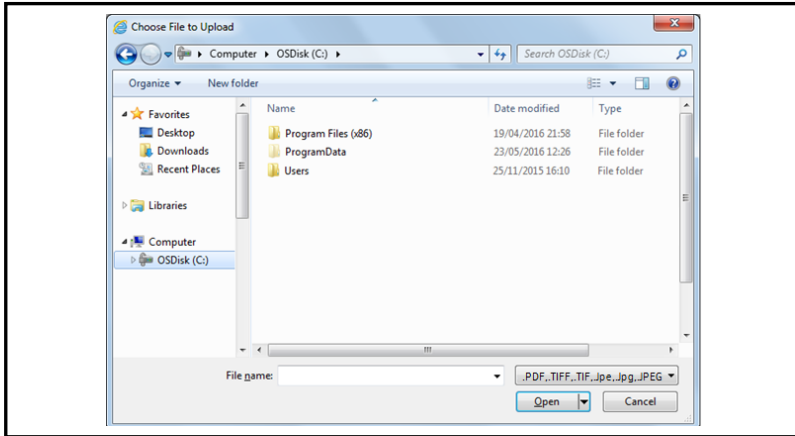
Upload Document(s)

If you have any comments relating to the case requirement(s), please enter them in the box provided.

Comment: Some additional notes

You'll then be presented with the following screen. Select 'Browse' and a new window will open, you'll then be able to attach the document(s) saved on your computer.

You can add comments to assist our underwriters or satisfy case requirements too.

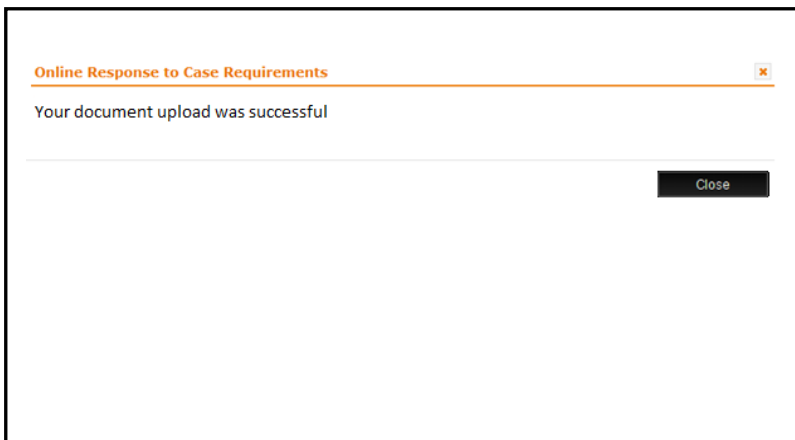


Navigate to the relevant folder, select the file(s) to attach and then select 'Open'.

When attaching multiple files to satisfy one requirement, the files must be in the same folder.

Your scanned documents must be saved as one of the following file extensions - TIF, TIFF, jpe, jpg, jpeg, pdf.

NB - If your proof is over 5MB in size, split the document into smaller sections and attach each part individually.



Once the document is successfully attached you'll receive confirmation and can return to the 'Case Requirements' screen by clicking 'Close'.

When attached the requirement will be removed from the 'Outstanding Case Requirements' screen.