MortgageBrain

LENDEX - User Guide

Contents

Introduction

Lendex is the delivery channel for mortgage application and submission processes. Compliant, efficient, FREE and simple to use, Lendex is designed to offer advisers immediate decisions direct from the lender without the need to re-key any information.

- One login for all lenders
- Submissions directly into lenders' systems
- Faster and more efficient than lender websites
- Over 1.5 million mortgage transactions processed to date

Lendex is jointly owned by:

- Lloyds Banking Group
- Nationwide Building Society
- RBS
- Virgin Money
- Barclays
- Santander

Registration

Before you begin using Lendex, it is necessary to register your details on the User Registration Database (URD). If you have already submitted applications using MTE, then you are already registered on the URD as they use the same process.

If you are not already registered, then contact our Support Desk on **01 254 4938** who will be happy to assist you in the registration process.

Your URD ID and password will be needed when you log into Lendex for the first time only. This is to authenticate your version of Lendex. The pin number you have chosen will be needed each time you send and track applications through Lendex.

Amending Registration Details

Should you ever need to change any of your registration details, such as company address, etc you can do so by logging on to [www.mteregistration.co.uk.](http://www.mteregistration.co.uk) You will need the following details to login:

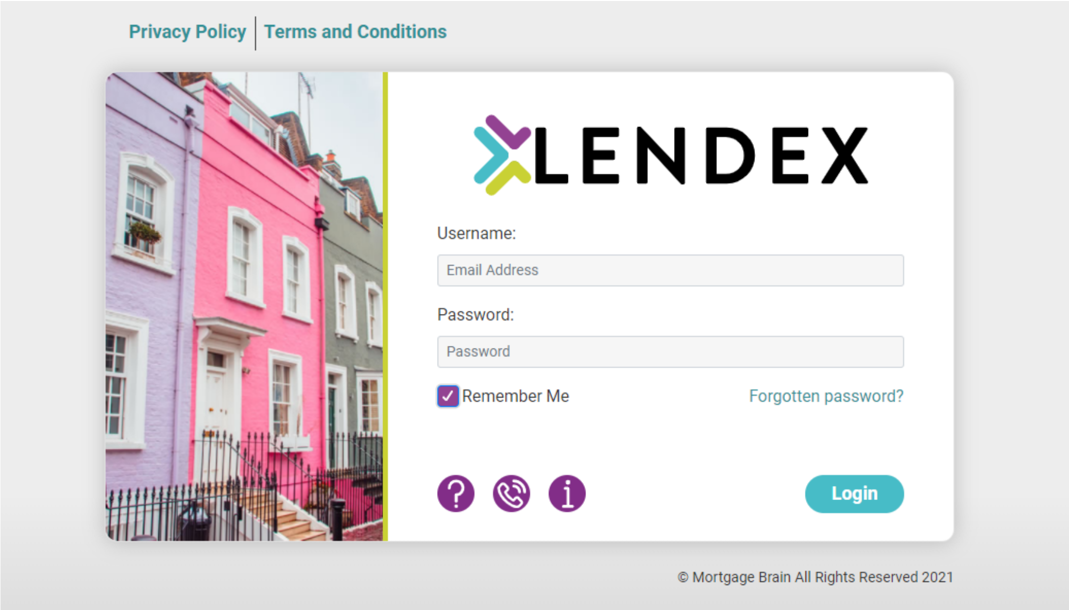
User ID
Pin Number
Password
Surname

If you cannot remember your details please call Customer Services on **01 254 4938** for assistance.

Once you have logged in, you can edit any information previously entered. Once you have made the required changes, ensure you click on the button to Save Changes.

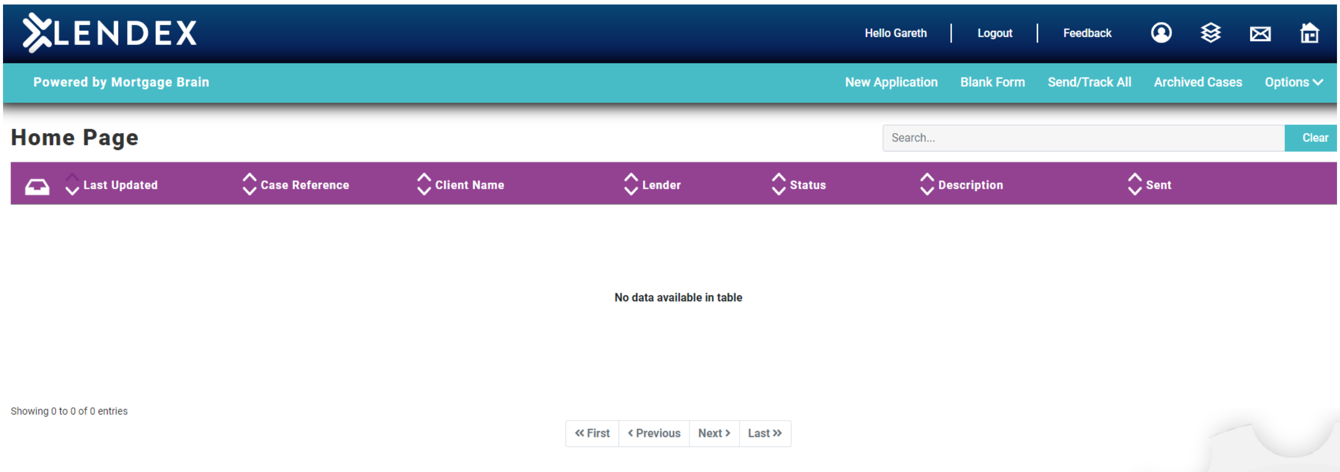
Logging on to Lendex

1. Using your Internet Browser, go to www.lendex.ie



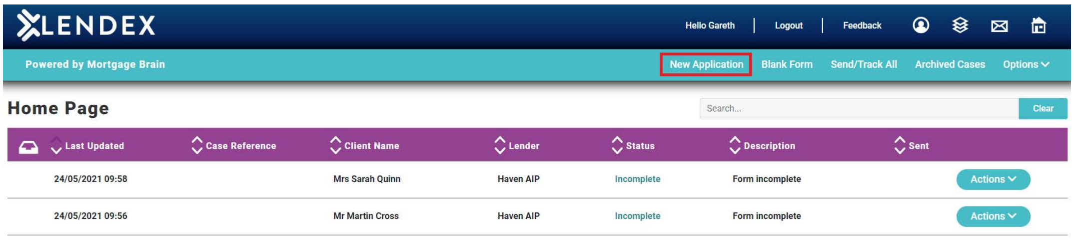
2. Enter your Username and Password, and click **Login**.

3. Once logged in, you will be taken to the Lendex home page.

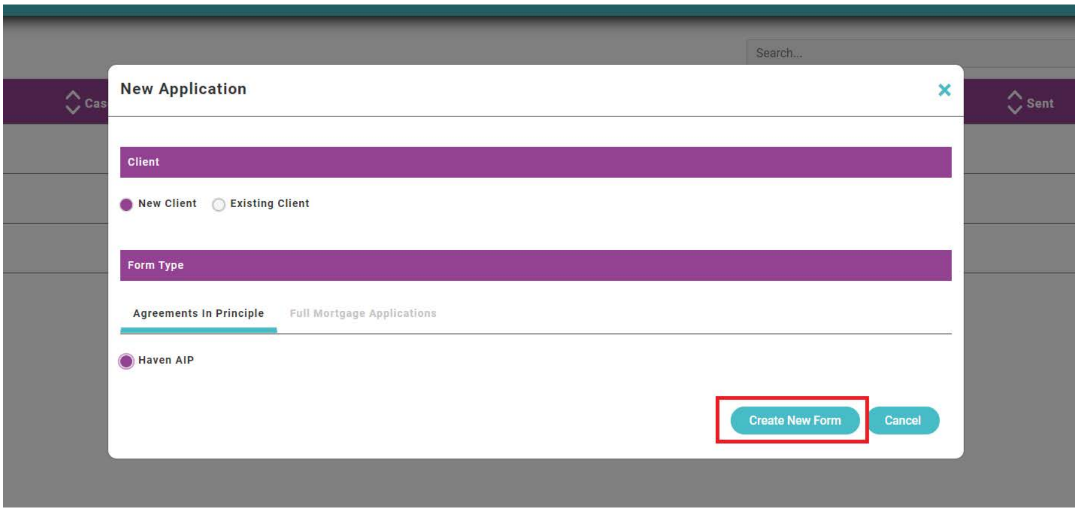


Completing an application form

1. On the Lendex home page, click **New Application**.

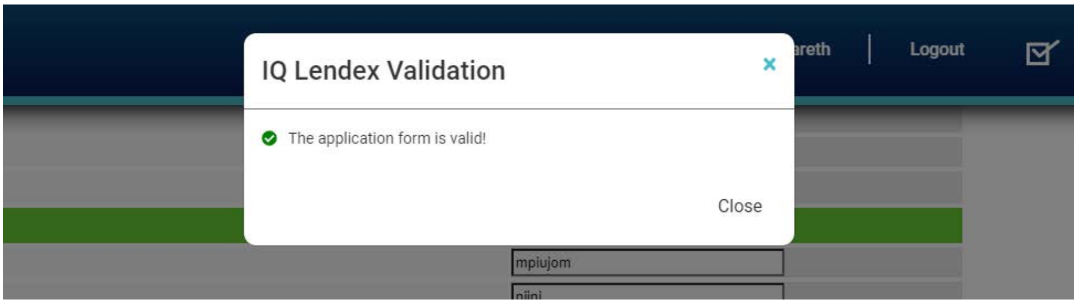


2. Choose **New Client**, **Haven AIP** and click **Create New Form**.



3. Complete all mandatory questions.

4. Click **Validate**. 

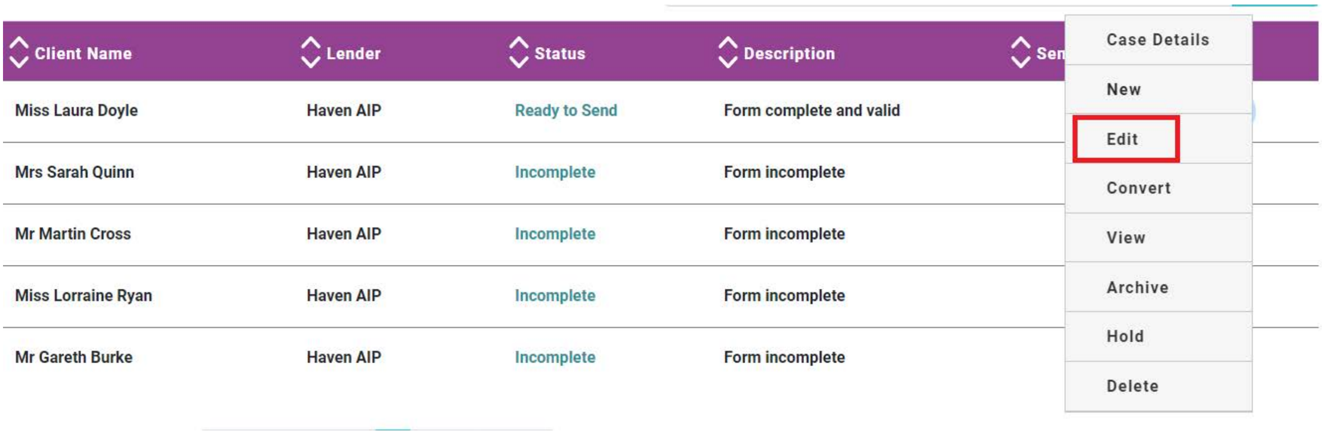


5. **Save** and **Close** the form.

Editing an Application form

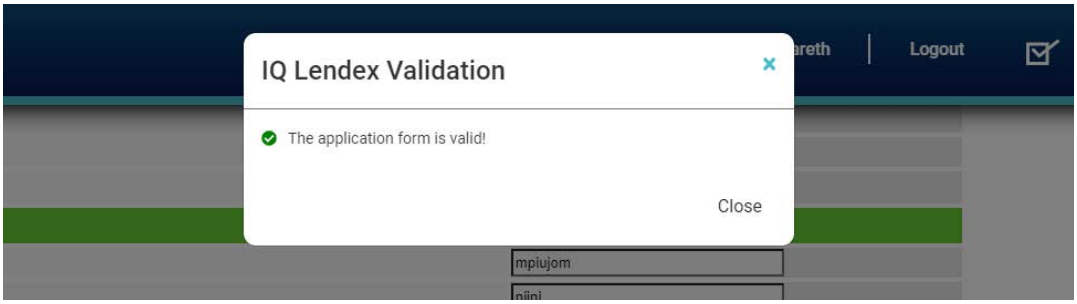
1. On the Lendex home page, click the **Actions** 

button next to the application you wish to edit. Click **Edit**.



2. The application form will now open and any amendments can be made.

3. Click **Validate**. 



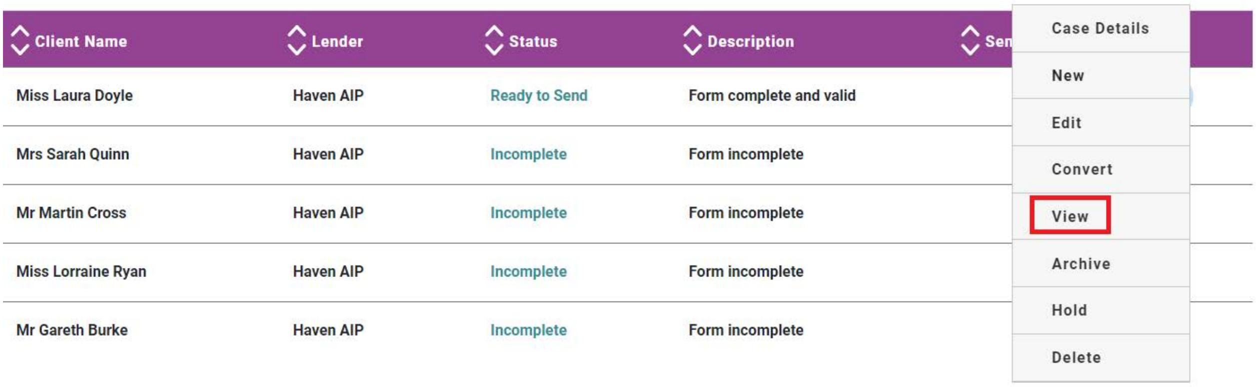
5. **Save** and **Close** the form.

6. The application can now be sent back to the lender.

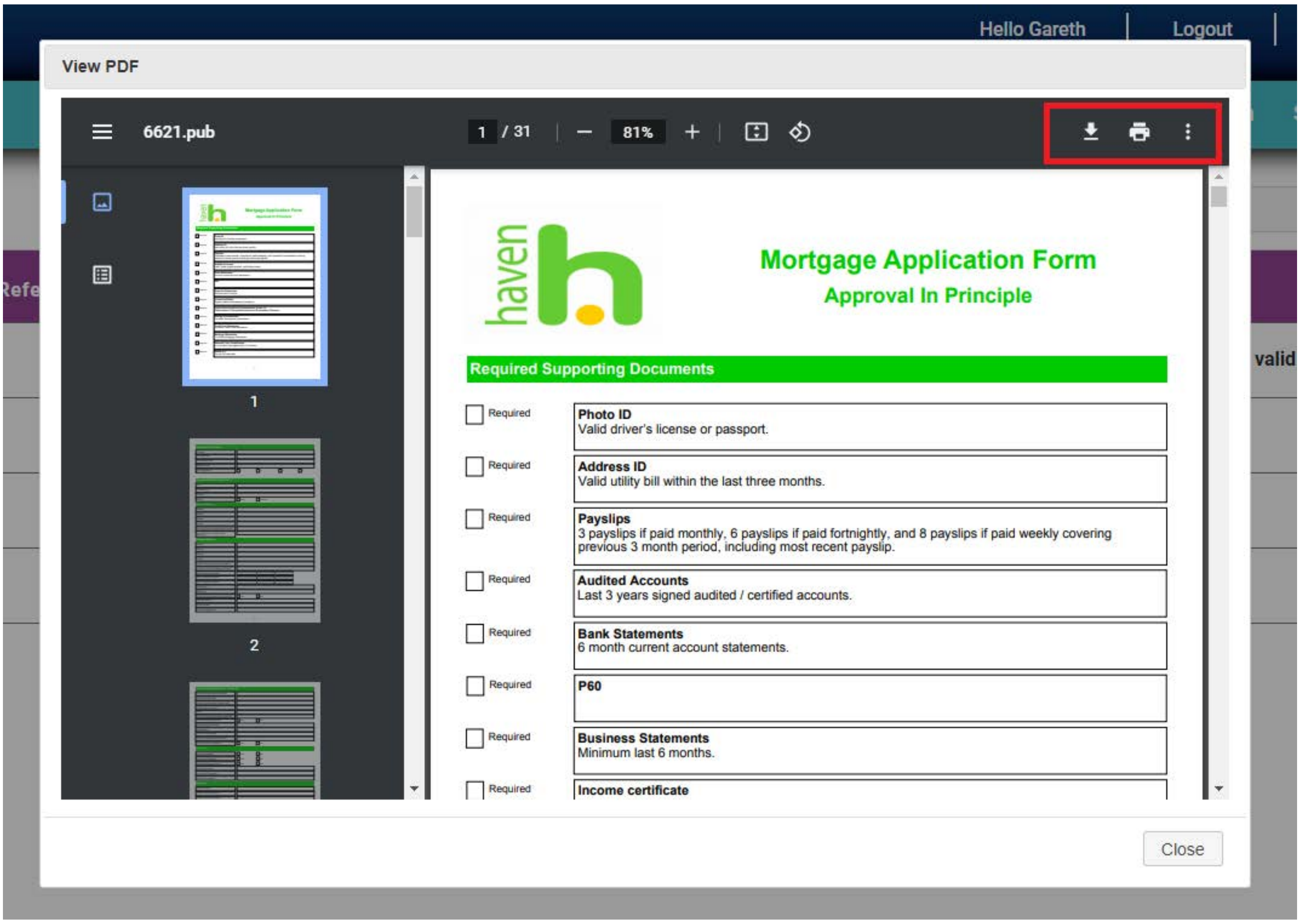
Viewing/Printing an Application form

1. Click the **Actions** button next to the application you wish to view as a PDF. Actions

2. Click **View** from the drop-down menu.



3. Click the **Download** or **Print** icon to print the PDF or to save the form as a PDF to your computer.



Sending and Tracking an application

1. Once an application is complete and valid, the status will be shown as **Ready To Send**.

Client Name	Lender	Status	Description	Sent	
Miss Laura Doyle	Haven AIP	Ready to Send	Form complete and valid		Actions

2. Click **Send/Track All** from the menu bar.

New Application | Blank Form | Send/Track All | Archived Cases | Options

3. **Check** the application you wish to send, enter your **PIN Number** and click **Send**.

PIN Number | Send | Cancel

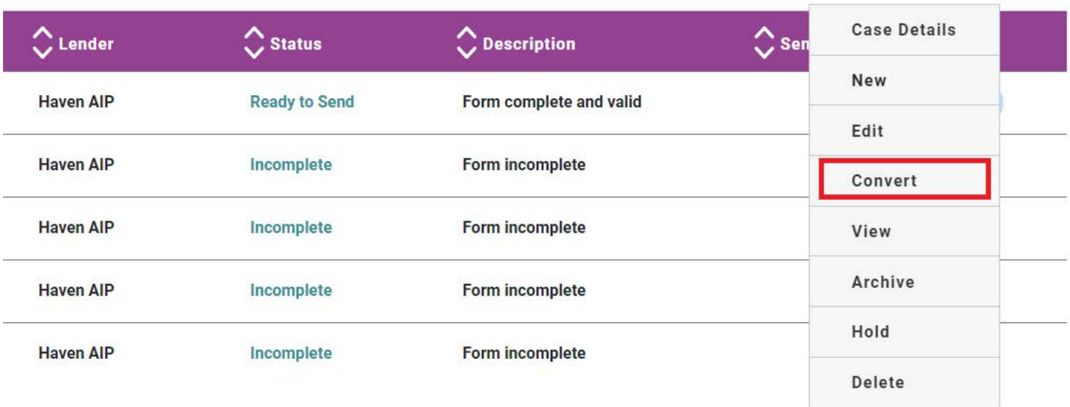
Client	Status	
Miss Laura Doyle	Queued	☑
Miss Laura Doyle	Queued	☑

4. The application has now been sent to the lender.

Converting AIP's to a Full Application form

1. On the Lendex home page, click the **Actions** button next to the application you wish to convert. 

2. Click **Covert** from the drop-down menu.



3. Choose the **Full Mortgage Application** type you wish to convert to and click **Convert**.

4. The lenders FMA will now open with the AIP's information prepopulated.

5. Once this form is completed please **Validate**, **Save** and **Close** Form.

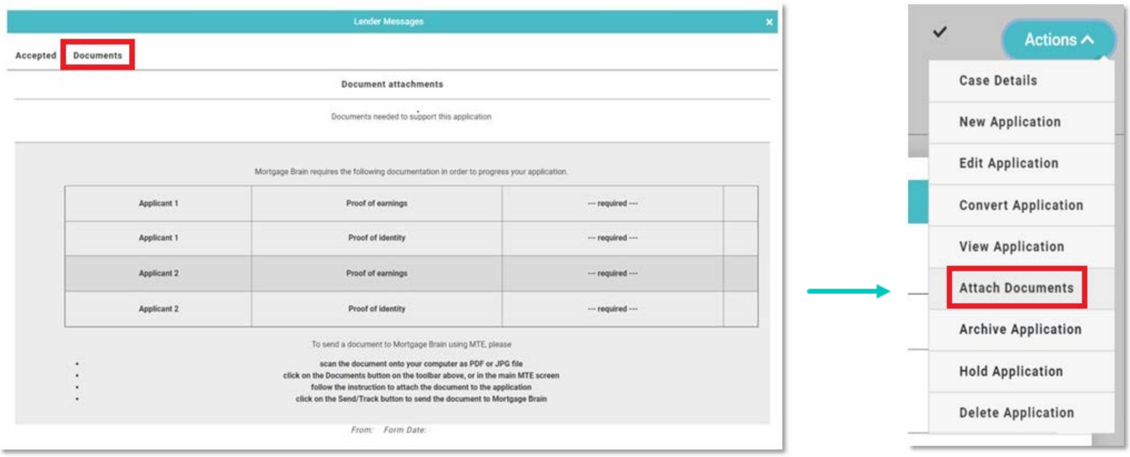
6. Now you are ready to **Send and Track** the FMA.

Attaching documents to an application

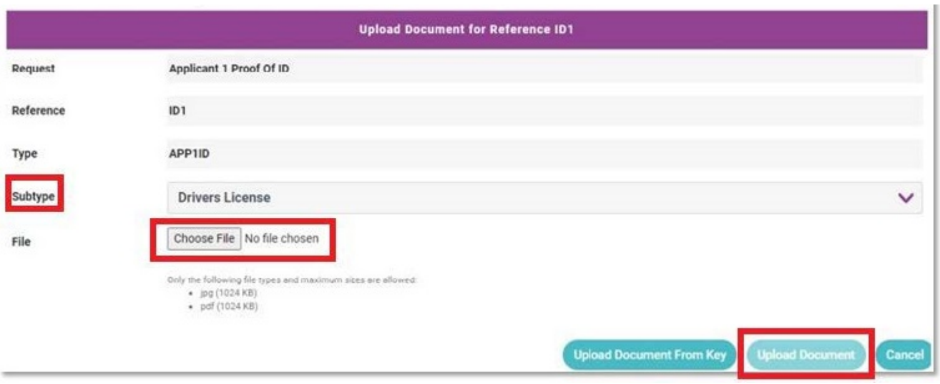
1. After submitting an application to the lender, click the **envelope** icon next to the application

2. Click on the **Documents** tab to view the list of required documents needed to support the application.

3. From the home screen click the **Actions** button next to the application and then choose **Attach Documents**. 



4. Click on **Attach** next to each document request type, select the **Subtype** and click **Upload Document** to browse to the file on your computer. Repeat this step to attach all documents.



5. One all documents are attached, the **Send/Track** process can be used again to send the attached documents to the lender.

Icons and Navigation

Home screen icons

The Lendex logo on the left and the house icon on the far right can be used to return you to the Home grid screen.

If there are responses from lenders that have not been opened and read, this icon will flag up the number outstanding.

Form actions needed – if a form has been dormant for more than 48 hours and requires completion, then this will display a number next to it indicating the number of actions that need to be completed.

View your Lendex account details.

Allows new applications to be created and progressed.

Provides the ability to display and print off a blank PDF of the lender form.

Offers the ability to send and track applications.

Provides the ability to move completed cases to a different page when no further progress is required.

Options > About provides data on the user, form versions etc.
Options > Test Connections offers the ability to test connections with the lenders to ensure that their servers are available