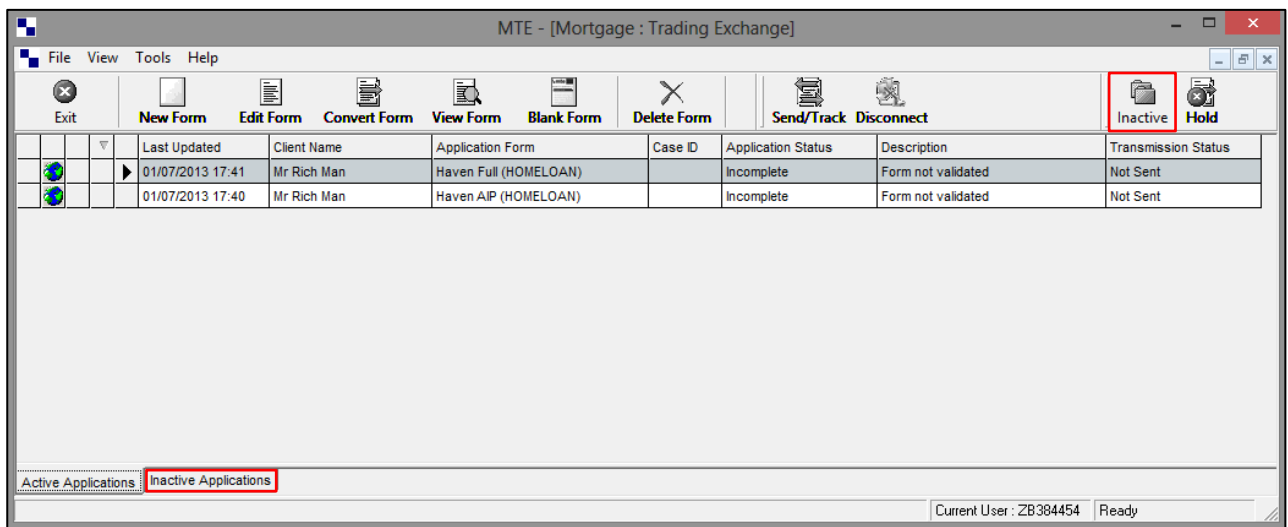


How To Manage Your MTE Work List

Inactive Applications

If the application has completed and there is no more action to be taken, then it's a good idea to move these applications to the **Inactive Applications** tab – down in the bottom left-hand side of the screen.

Simply click to highlight the client's form that you wish to move and then click on the **Inactive** icon at the top of the screen.

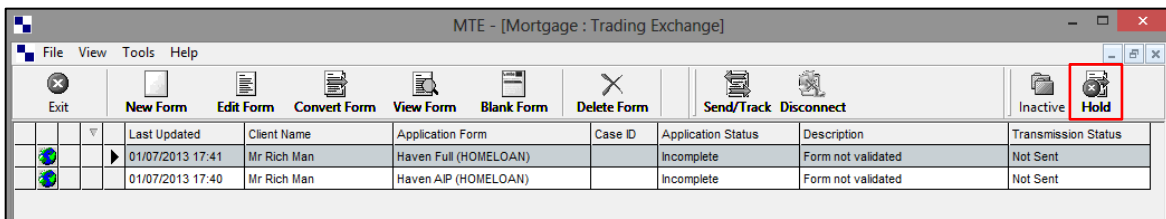


The form is automatically moved from the Active applications tab to the Inactive applications tab. If you wish to move the application back to the **Active Applications** tab, then simply click to highlight it again and this time press the **Restore** icon at the top of the screen.

Holding Applications

MTE will automatically submit an application to the lender if it is completed and ready to be sent. However, there may be occasions when you wish to **Hold** the application from being sent immediately.

MTE allows you to **Hold** the application for as long as you require. Firstly, click on the client's application and then select the **Hold** icon at the top of the screen.



You will notice that once you have put an application on **Hold**, the status of that application will change and it will clearly display that it is on hold.

When you are ready to send the application form, simply highlight the form and select the **Hold** icon again. The status will be changed back and the form will be ready to submit to the Lender.

Reordering Applications

When your list of application forms gets longer, it may be harder to find the client you require. By simply clicking on a column heading you can sort the information into numerical or alphabetical order.

You will notice from this picture that the form updated column has been reordered into the oldest date first. An arrow appears in the column heading to indicate which way the column can be reordered next time.

