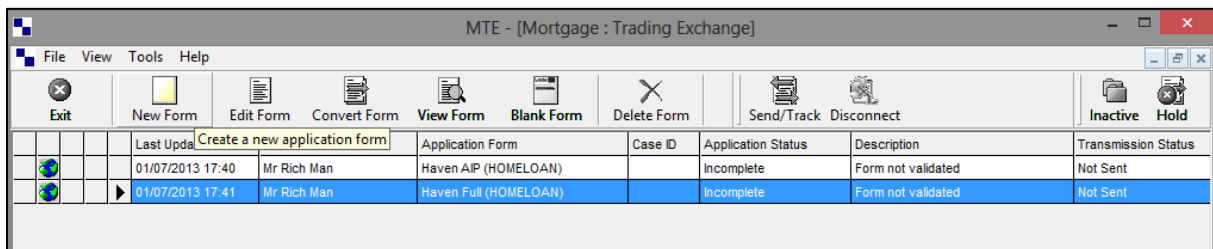


How To Select and Complete Application Forms Using MTE

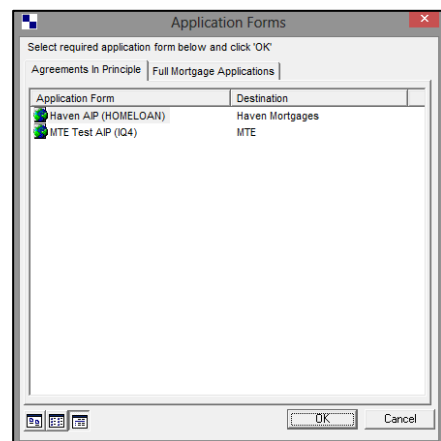
Selecting application forms

Having logged in to MTE, you will see a row of buttons at the top of the screen. By clicking on the **New Form** icon, this will allow you to select your required application form from the list available on MTE.

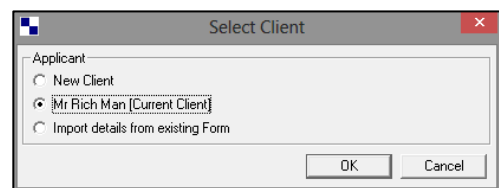


You will see that the list is divided into **Agreements In Principle** and **Full Mortgages Applications**.

Simply select the form that you wish to complete from the relevant tab and click **OK**.



You will then see **Select Client** screen. This prompts you to select whether you are starting with a **New Client**, **Current Client** or **Import details from existing Form**. Select the option you need and click **OK**.

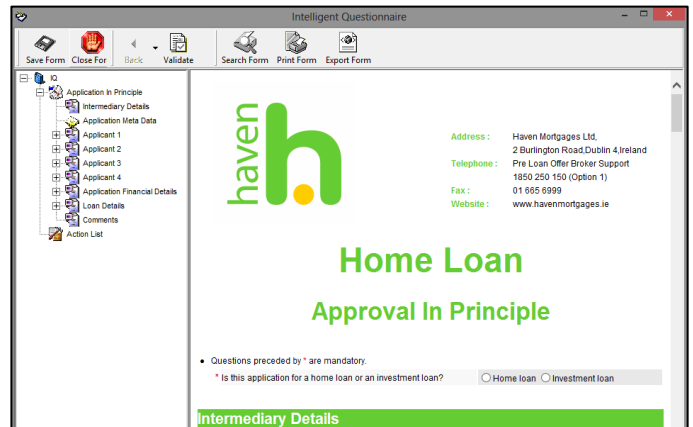


MTE doesn't need to be connected to the internet for you to complete forms, this means that should your client not have all the information to hand when you are applying for their mortgage you can always store the application and finish it at a later date.

Completing a NEW Application Form

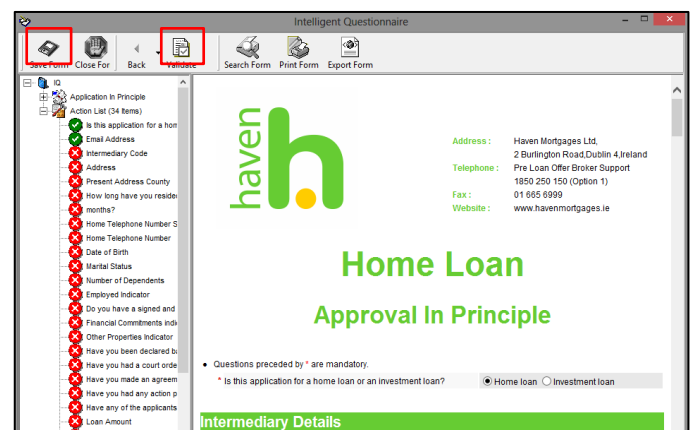
Once your selected Application form has fully opened on the screen you should find that any client data that has previously been entered should be pre-populated into the necessary fields.

To finish completing the outstanding questions, you can either work your way through the questions by scrolling down through the application form until you get to the end.



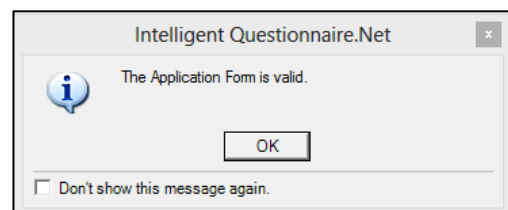
Alternatively, you can use the **Validate** button at the top of the screen.

Having clicked on the validate button, this will provide you with an **Action List** of outstanding mandatory questions. Only once these have been completed can the form be validated and sent to the lender. You may save the form at any point by clicking on **Save Form**.



As you complete a question from the **Action List** the indicator will change to a green tick.

Click on the **Validate** button once more to check that the mandatory questions have been complete. If so you will see a confirmation box appear stating the form is valid. Click **OK** to return back to the form.



You will now need to save and close the Application form in order to submit it to the lender. When back on the grid screen (list of applications) under Application status you will see that the form states **Ready to Send**.

The MTE software only relies on an internet connection when updating or when sending/tracking applications. With no internet available you can still open, edit, validate and save your applications forms.