Setting up Introducers and giving them Web access

The purpose of this document is to enable you to:

- Nominate a person to accept web enquiries
- Set up introducer records on the Key
- Enable introducers and clients to view progress on cases through the Internet

The Key enables other 3rd party relationships such as solicitors and estates agents to pass mortgage enquiries to you by using the Web. The lead is then automatically assigned to you or your administrator, depending on your set up, and is displayed on your tasks list.

The introducer also has the ability to view progress on the case through the same web site, enabling you to keep them up to date automatically. The Key also allows you to set up access for your clients so that they can view details of their case.

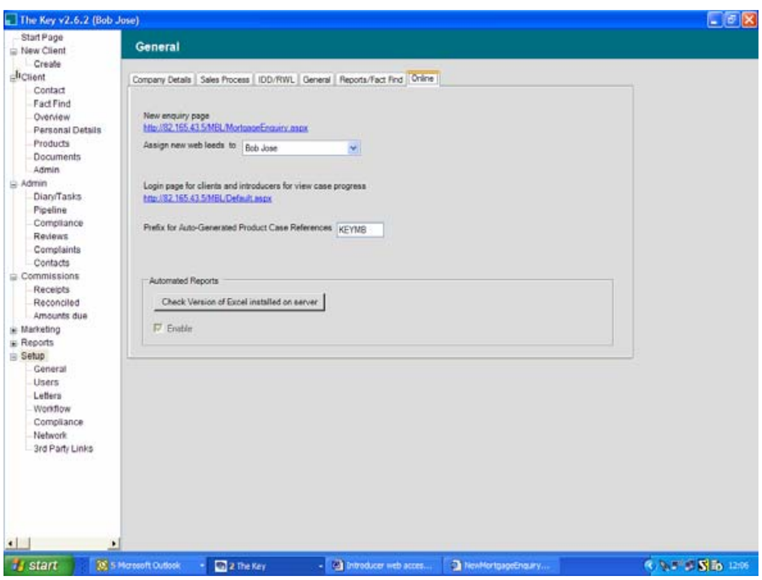
Nominating a person to accept web enquiries

In order to set up and enable introducers to introduce business to you, you need to decide who in the organisation will receive and process the new web enquiries. You may choose, for example, for an administrator to receive all enquiries, and then they can further assign cases to a specific broker.

To set up the recipient of web enquiries you do the following:

1. Select Setup > General from the menu. You see the General screen displayed.

2. Select the [Online] tab on the General screen. You will see the Online screen displayed.



3. Select the appropriate role from the drop down menu in the [Assign new web leads] to field

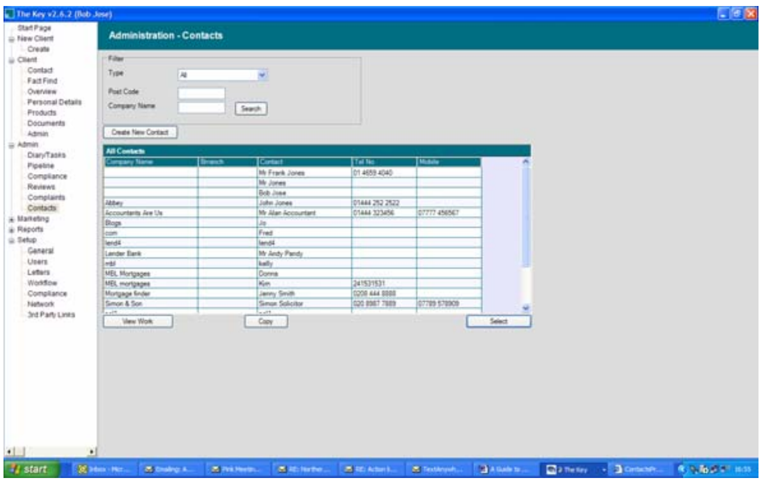
4. Return to the front screen by clicking on Start Page to save the changes.

You have now set up a role to accept and process new web enquiries from introducers. The next step is to set up an introducer to allow them the ability to submit web based enquiries.

Setting up introducer records on the Key

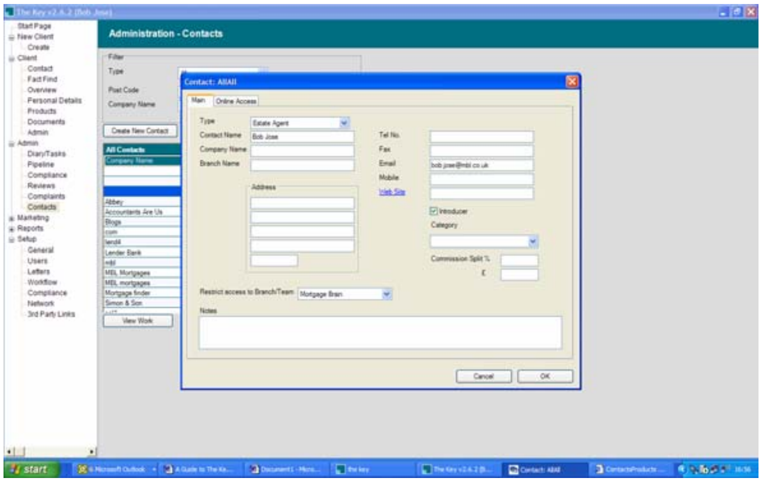
In order to give clients or introducers access to the Key:

1. Select Admin > Contacts from the menu and you see the Administration – Contacts screen displayed.

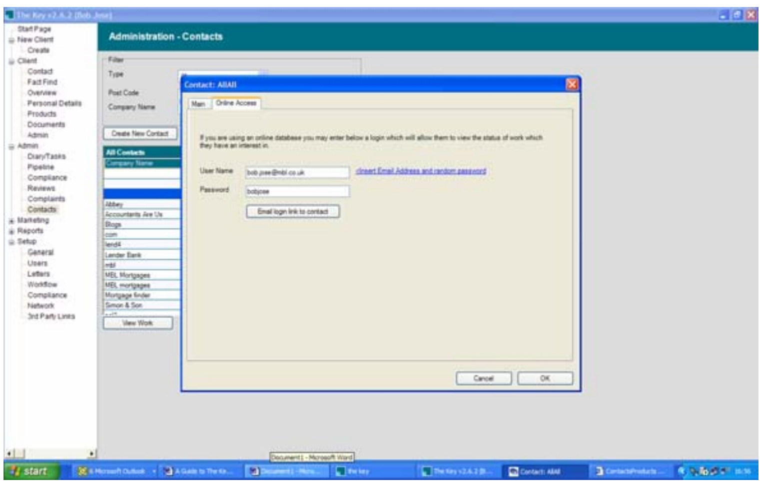


2. Select [Create New Contact] option. There are two tabs to complete. The Main contact details and Online access.

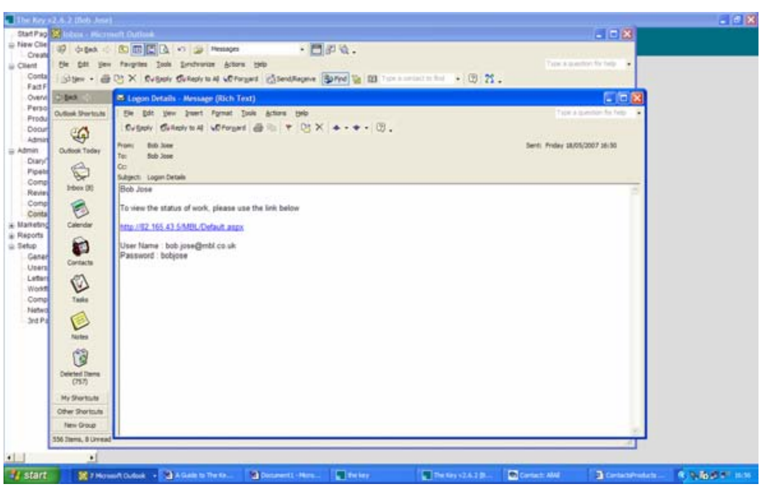
3. Select the [Main] tab and type in the following for the introducer:
    - Select type of introducer from the drop down list
    - Enter Contact name
    - Enter Company address
    - Enter Branch name
    - Enter address details
    - Restrict access to Branch/Team – this option enables you to limit the information that the branch/introducer sees to the select branch only.
    - Enter Tel no, mobile no, Email address and web site address
    - Tick to select this contact as an introducer
    - Select a category – this indicates the method of introduction that you are expecting from this introducer
    - Select a commission split or set amount per case for this introduced business in the fields provided.



4. Select the [Online Access] tab. This enables you to set up permissions to allow the introducer to view cased through the Internet. Enter a user name in the User Name field and then set up a password in the Password field.



5. Select [Email login link to contact] and an email is automatically send to the contact with the login details.

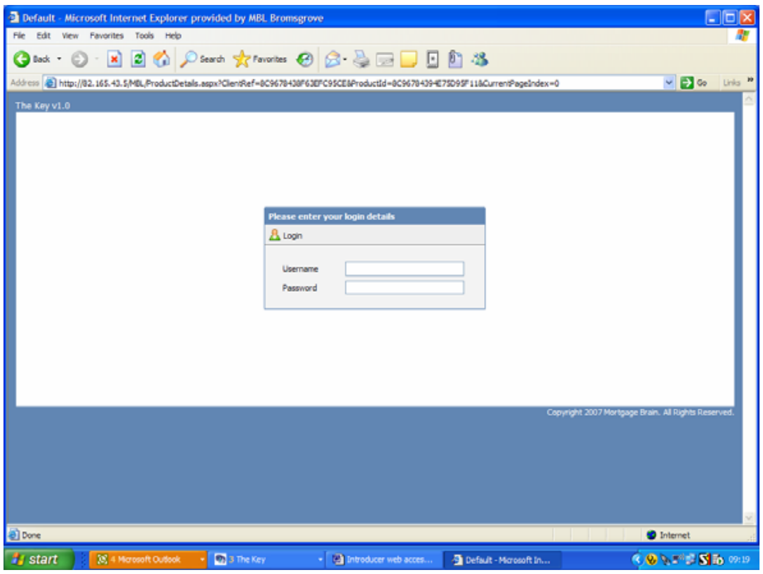


The Key automatically identifies the URL required to access the database. On servers which are hosted by organisation, need to ensure that access to the database servers has been enabled. For Mortgage Brain hosted systems, this access is automatically enabled.

To set up roles for customers to view their own details you follow the same procedure as detailed above.

Enabling introducers to view progress on cases

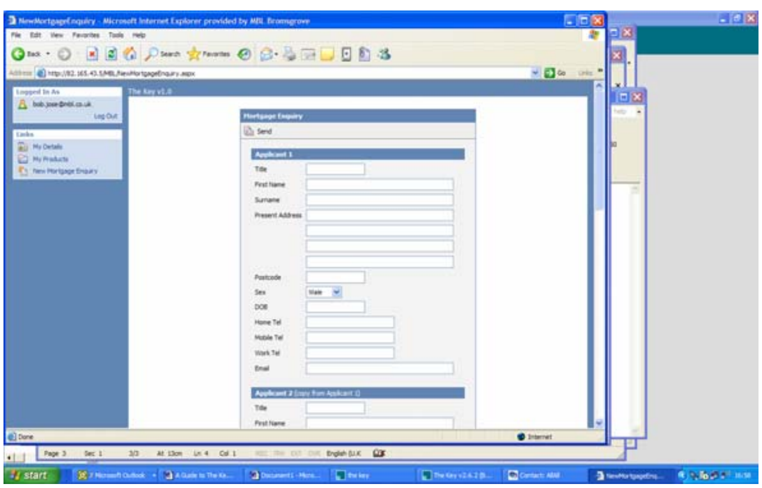
Once the contact has received his email confirming the login details, the contact selects the URL link from the mail and the login page is displayed.



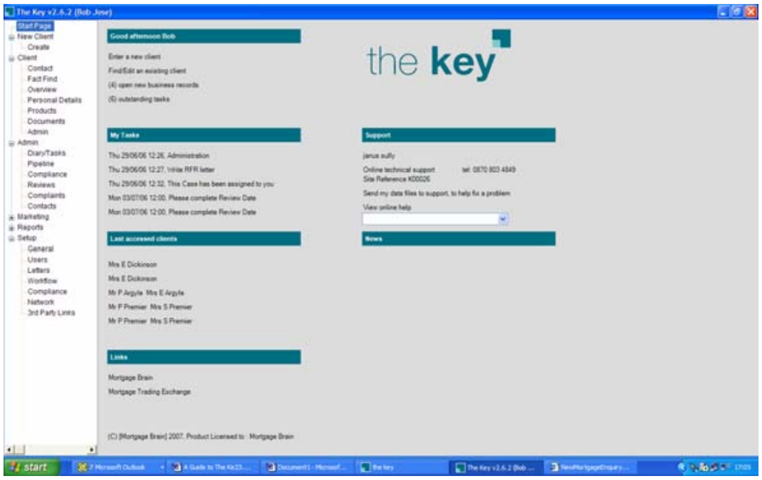
1. The contact enters the Username and Password as displayed in the email.

2. Select [Login] from the top of the login box. If you have already identified the introducer for a product, the products are displayed. If this is a new contact, the products list will be blank.

3. The contact can introduce a lead to you by selecting the [New Mortgage Enquiry] option from the menu on the left of the screen. The New Mortgage Enquiry screen is displayed.



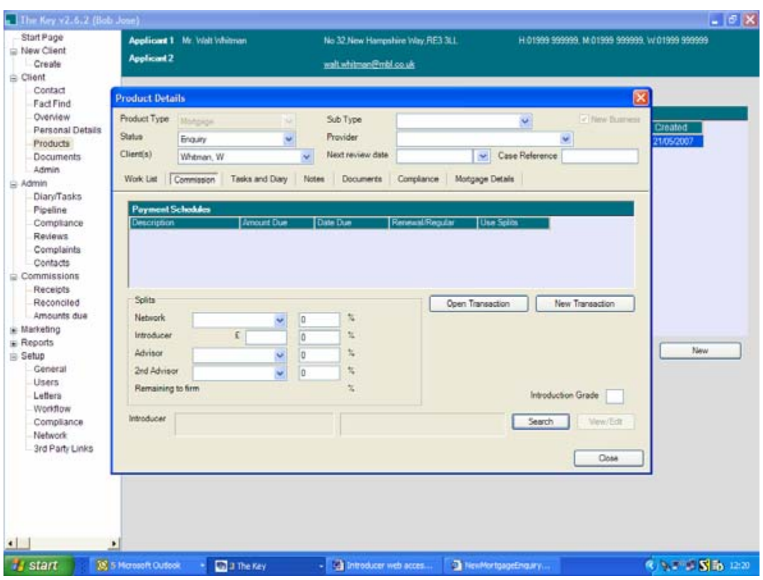
4. The contact completes the mortgage enquiry screen and selects the [Send] option at the top of the form. This then sends the lead to the Key database. It is saved as a lead, date and time stamped, and the enquiry is displayed as an outstanding task on the Start Page, as shown below.



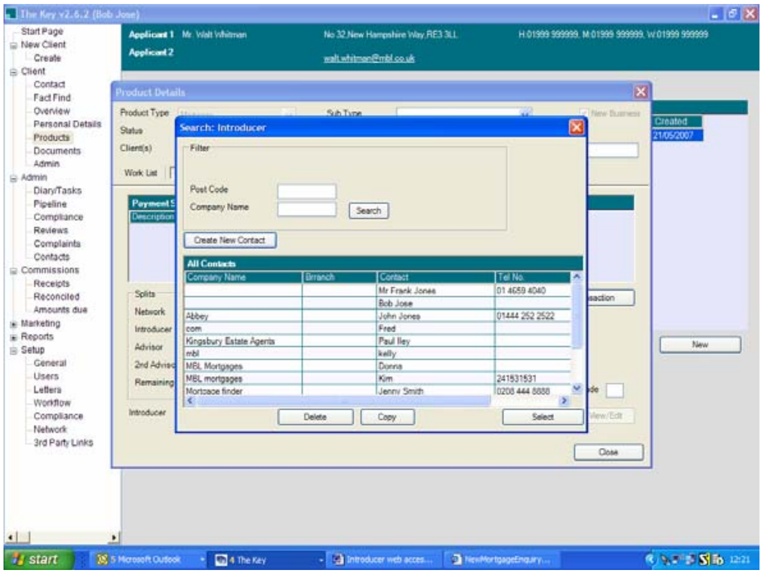
5. The lead comes in and is automatically set up as a mortgage lead. Next you need to record the introducer against the product. To do this Select Products and you will see the products screen displayed.

6. Select the new product from the enquiry lead and select to [Open] the case.

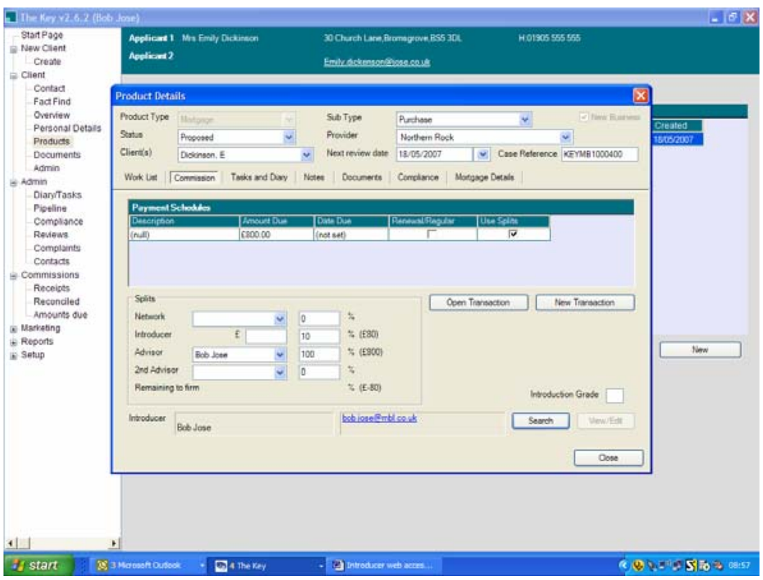
7. Select the [Commission] tab and you see the commissions screen displayed.



8. From the Product Details Commissions screen press [Search] at the bottom of the screen. You see the Introducers list displayed.

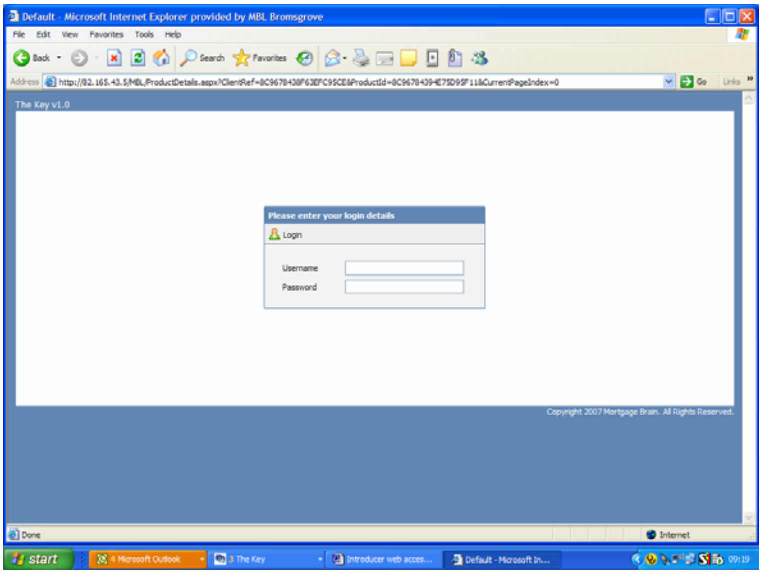


9. Select the introducer to set up a commission record for the introducer. The introducer is now associated with a live product case, and an expectation of commission has been set.



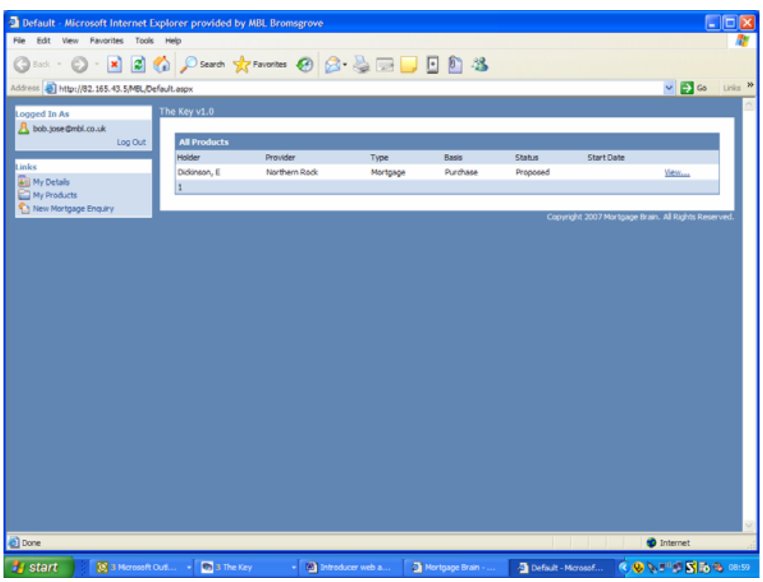
Tracking enquiries

The introducer or client can use the web site link to view progress on a case. The contact goes to the URL link on their confirmation email and the login page is displayed.

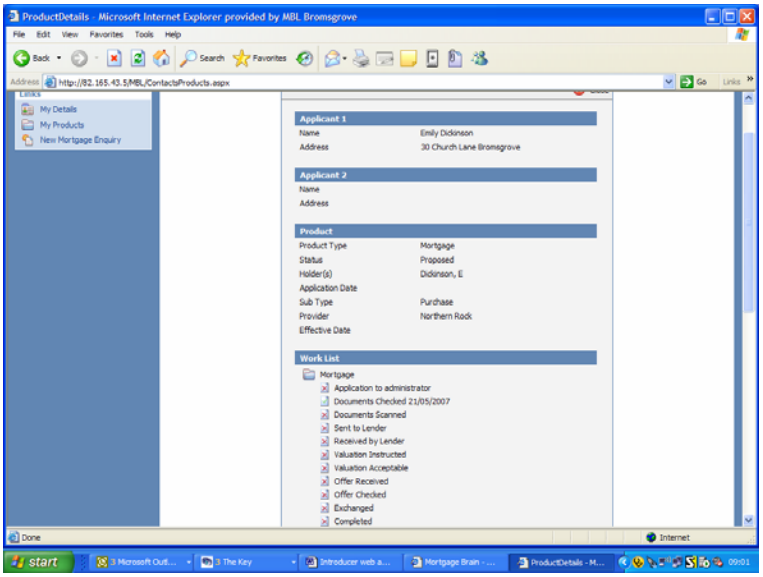


1. The contact enters their Username and Password as displayed in the email.

2. Select [Login] from the top of the login box. If you have already identified the introducer for a product, the products are displayed.



3. The Introducer or client then clicks on the [View…] option to view further details of the case. This is displayed below.



4. From this screen the Introducer can update their details, introduce more business, or view cases.