








Integration Guide

Aldermore

Application Types

-  Decision In Principle

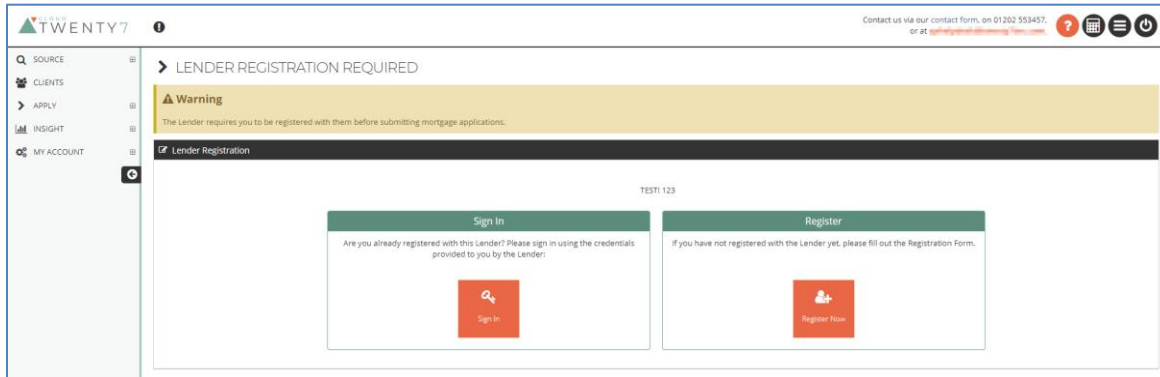
Features

-  Tracking Case Tracking capabilities are supported with this integration.
-  Amendments Case Amendments are supported by Aldermore.
-  Documents Documents can be attached to an Aldermore Case, but they will not be sent from APPLY. Documents will be returned by Aldermore with the DiP Decision.
-  Notes Two-way Messaging between the Broker and the Lender is not supported.
-  Payments Aldermore will not request payments via APPLY.

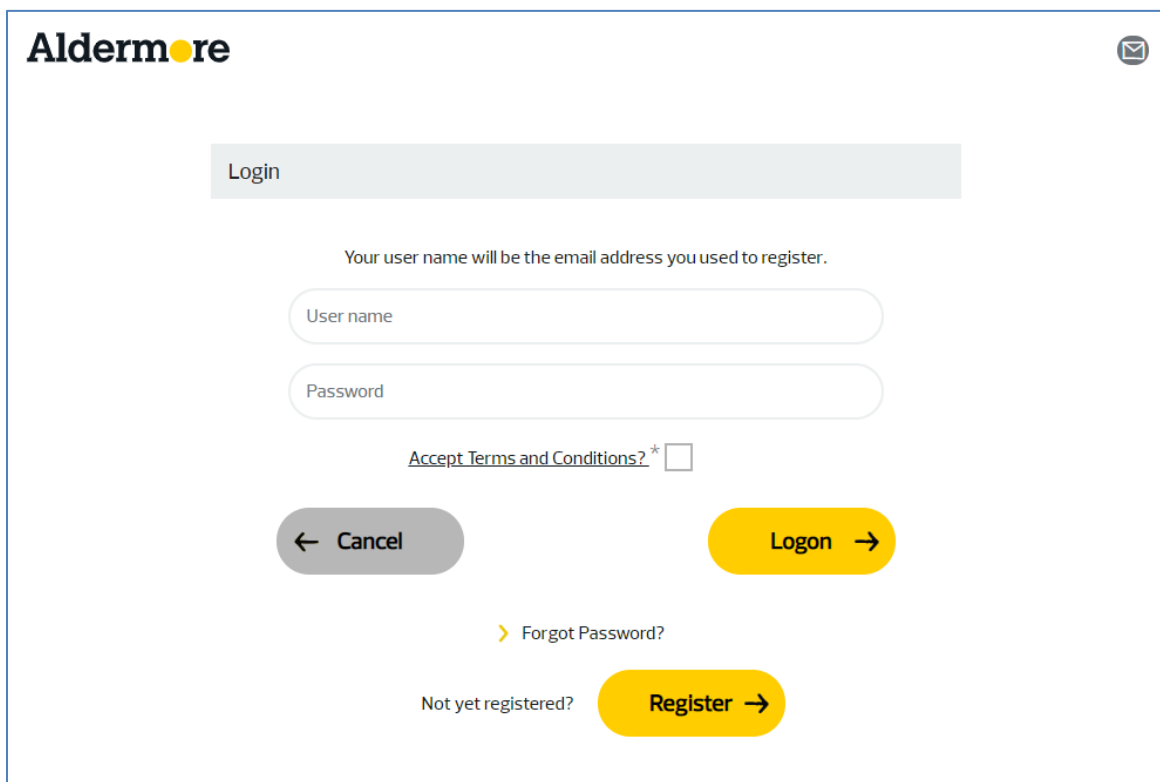
Registration

Aldermore requires that you are registered with them before you can submit cases.

The first time you initialise an Aldermore case through APPLY, you will be given the opportunity to 'Sign In'. Clicking 'Sign In' will take you to Aldermore's Registration page.



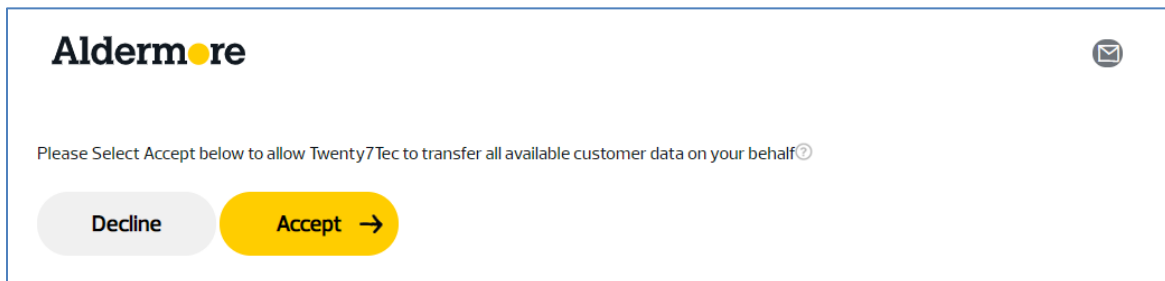
If you already have credentials for Aldermore, simply click 'Sign In' and you will be taken to Aldermore's Intermediary Login page.



If you already have an Aldermore Username and Password, enter them, click 'Accept Terms and Conditions' and then 'Logon'. If you haven't already got an Aldermore Username and Password, simply click 'Register'.

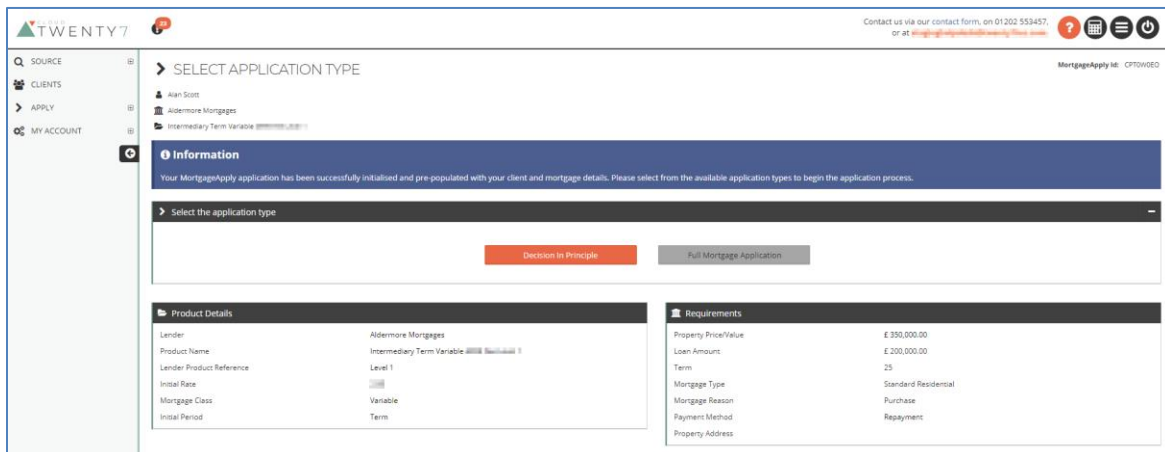
Once Aldermore has validated your credentials successfully, you will be able to proceed with the application. The 'Sign In' process will only occur on the first application with Aldermore, or if Aldermore expires or disables your previously validated credentials.

Click 'Accept' to give APPLY permission to send case data to Aldermore.



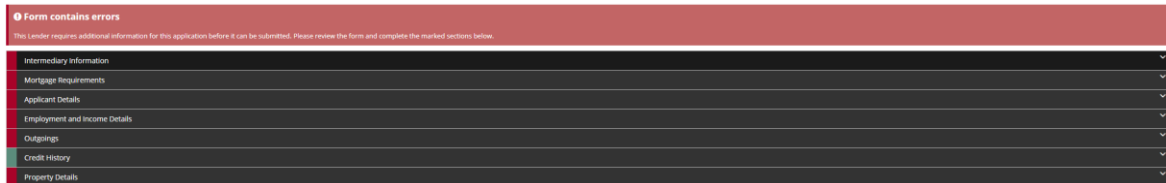
Processing

The integration with Aldermore, allows a Broker to complete all the required information for an Aldermore DiP.



Notes

Validation



When editing an Application Form, and all mandatory fields have been populated, clicking 'Validate' in the top right-hand corner, will check with Aldermore to ensure that the product is still the correct fit. If the product doesn't fit, the Application Form will display information at the top of the form.

DiP Decision

Once you have a validated form, submitting the DiP to Aldermore could potentially result in the Client being offered an alternative product for the client.

Once you have submitted the Case to Aldermore, it will change to 'Processing'. If Aldermore accept or decline the Case, it will change to 'Decision' with a status of *Accepted* or *Declined*.

With each DiP that gets accepted by Aldermore, a DiP Acceptance and an ESIS Illustration will be returned, and can be accessed via the Case Documents section.

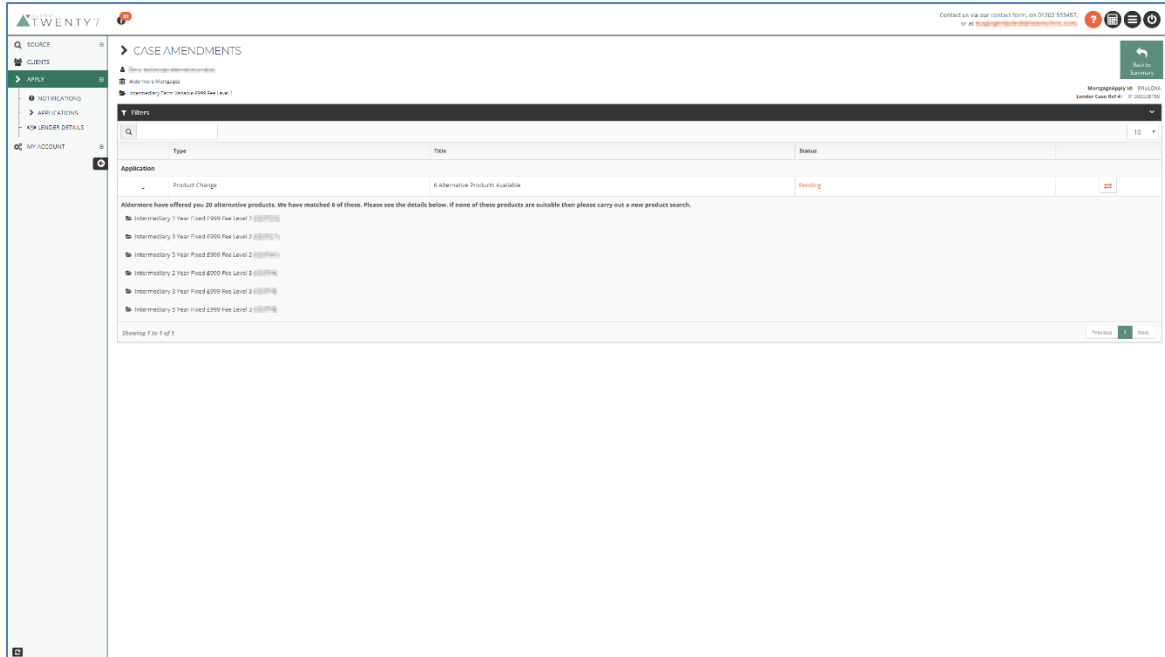
Case Amendments

If Aldermore offers an Alternative Product to the one previously applied for, the Case will change to a status of *Action Required*.

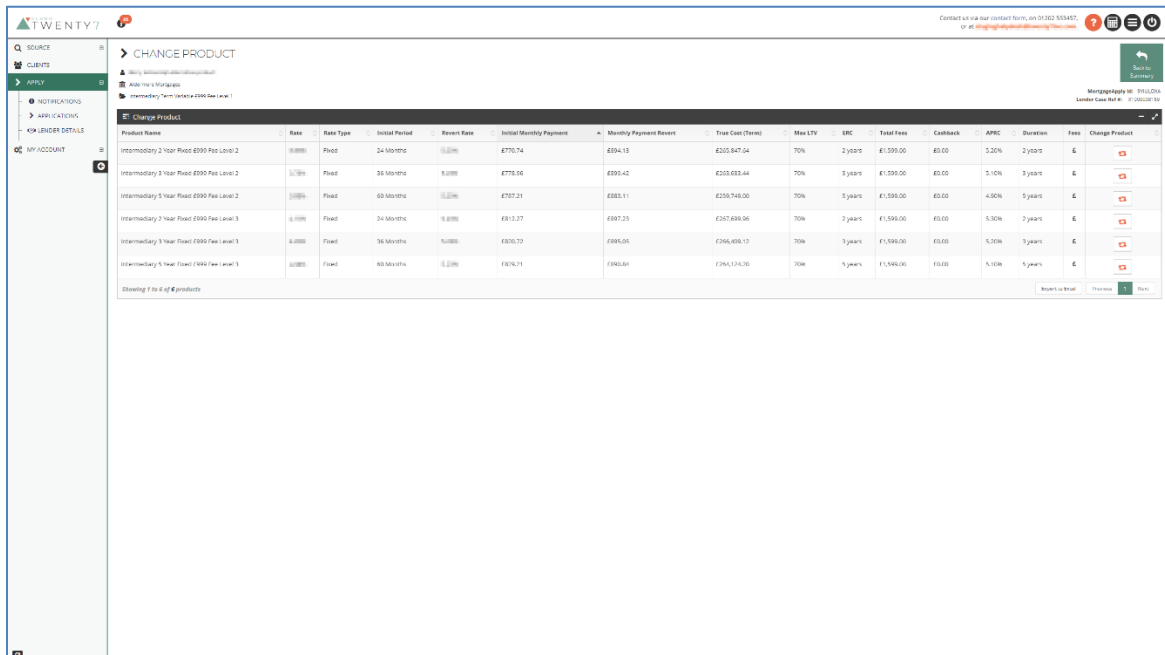
Action Required

A case amendment has been added for this application. In order to proceed please go to Case Amendments and make the necessary changes in order to continue.

APPLY will display what has been offered by Aldermore, and if an alternative product has been offered, you will be allowed you to 'Change Product'.



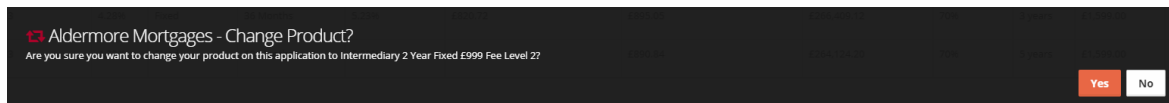
Clicking the 'Change Product' button will take you to the Change Product page which will display a list of all the products that the CloudTwenty7 SOURCE module has, and that Aldermore are happy for them to apply for.



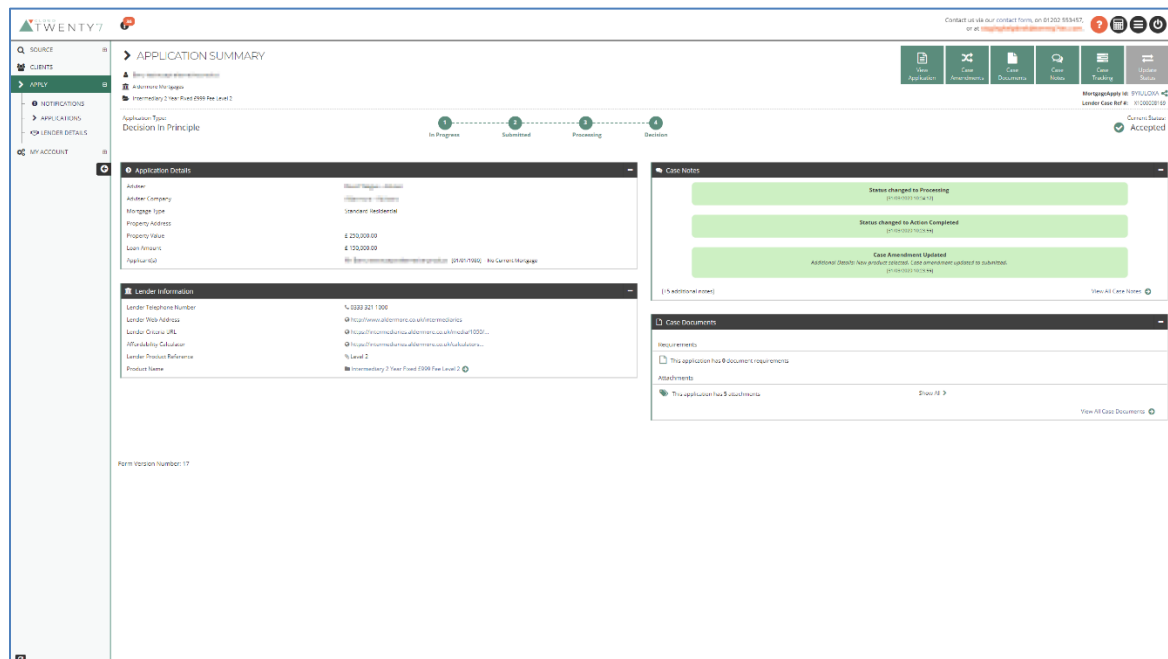
Please note that the Change Product page will only display those Aldermore products that are available via SOURCE.

Clicking on any of the offered products will take you to the Product Details page, allowing you to see additional information about that product.

Returning to the Change Product page, if there's an alternative product that's a good fit for the Client, simply click the 'Change Product' button on the right-hand side, and then 'Yes' to continue when prompted.



The status of the Case within APPLY will automatically change to *Action Completed* and will be sent back to Aldermore to make a decision.



Converting a DiP to an FMA

The Aldermore integration supports the submission of DiP's, but not FMA's, and therefore a DiP that gets accepted by Aldermore, cannot be converted to an FMA within APPLY.

Once the DiP has moved to Decision > Accepted, Brokers will need to go direct to the Aldermore Intermediaries Portal (<https://www.aldermore-brokerportal.co.uk/MolSiteVisa/Logon/Logon.aspx>) in order to convert the DiP to an FMA for the Client.

Training and Support

Online Training Support

Web based online training via WebEx lasting 30 minutes to 1 hour.

Online Tutorials Coming Soon

Face to Face

Please contact Twenty7Tec on helpdesk@twenty7tec.com or 01202 553457 to book your session.