



Integration Guide

TSB

Application Types

-  Decision In Principle






Customer Types

Supported

- Residential Purchase
- Residential Remortgage
- Help to Buy Equity Purchase
- Standard BTL Purchase
- Standard BTL Remortgage inc. Let To Buy
- Portfolio Landlord Purchase
- Portfolio Landlord Remortgage
- Shared Ownership

Not Supported


Features

- | | | |
|---|------------|--|
|  | Tracking | Case Tracking capabilities are not supported with this integration |
|  | Amendments | Case Amendments are not supported |
|  | Documents | TSB do not support the capture of Documents within APPLY |
|  | Notes | Two-way Messaging between the Broker and the Lender is not supported |
|  | Payments | TSB do not support the capture of Payments through APPLY |

Registration

TSB requires that you have an existing login to <https://intermediary.mg.tsb.co.uk> before you can submit cases via APPLY.

If you are not registered, you will need to go to <https://intermediary.mg.tsb.co.uk/registration/#!/register> to register before starting a Decision In Principle.


Contact us

Register for TSB Intermediary

If you need assistance with your registration, please call 0345 307 3357 (Option 2).

TSB Bank plc retains and uses the details you give about yourself to manage your registration, for research and analysis and to prevent fraud. These details will be shared with others including fraud prevention agencies for these purposes. For full details on how we will use and share this information, please refer to our [website](#).

Your personal details

Title

Forename

Surname

Date of birth

Mobile

Telephone

Firm details

Select one or more roles

Broker

Administrator

Supervisor

Case Viewer

A Broker is an individual qualified to give mortgage advice.
Administrators can create new and update existing cases on behalf of brokers.
Supervisors can view all of their firm's cases in a read-only format and can transfer cases between brokers. Case Viewers can view the cases of their linked

Your security details

Email address

Confirm email address

Please note, answers to your security questions are case sensitive.

Security question

Security answer

Security question

Security answer

Security question

Security answer

Firm address

No firm selected

Trading address

No trading address selected

2 | Page

Processing

The APPLY integration with TSB, allows a Broker to complete all the required information to create a Case within their Intermediary Portal.

Intermediary Information

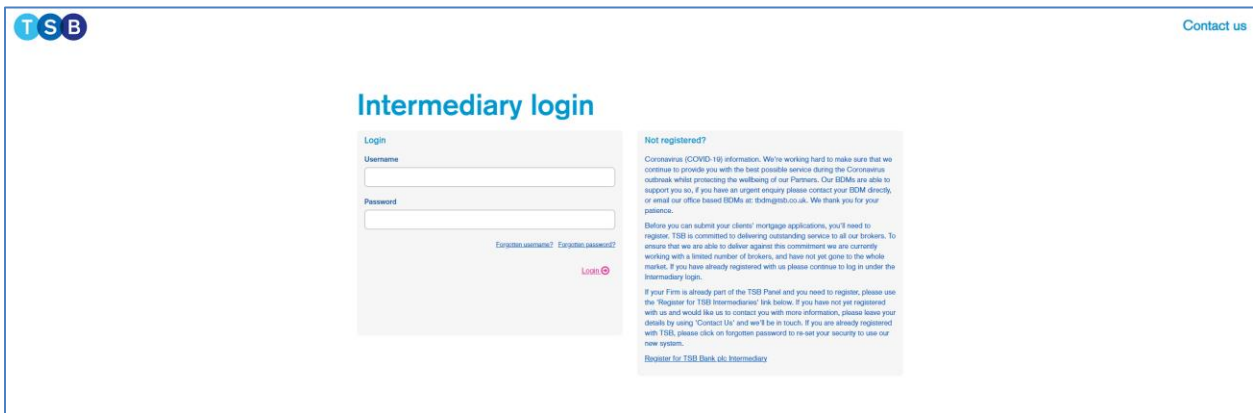
It is imperative that the 'Email' and 'FRN' information that you enter into the **Intermediary Information** of the DiP, is the same information that TSB have on record for you. Entering an incorrect FRN could result in the transfer of data not working correctly.

Submitting the DiP

When submitting applications by clicking **Transfer Data** in the top right-hand corner of the Application Summary page, APPLY will send the data to TSB.

No credit checking or processing has occurred at this point.

Once the data has been transferred, a new browser tab will automatically open, and you will be taken to TSB's Intermediary Login page. If you are not automatically redirected to TSB's Portal, simply click the link in the blue banner at the top of the APPLICATION SUMMARY page.



TSB Contact us


Intermediary login

Login

Username

Password

Forgot my username? Forgot my password?

Login 

Not registered?

Coronavirus (COVID-19) information. We're working hard to make sure that we continue to provide you with the best possible service during the Coronavirus outbreak whilst protecting the wellbeing of our Partners. Our IDMs are able to support you so, if you have an urgent enquiry please contact your IDM directly, or email our office based IDMs at: fdm@tsb.co.uk. We thank you for your patience.

Before you can submit your clients' mortgage applications, you'll need to register. TSB is committed to delivering outstanding service to all our brokers. To ensure that we are able to deliver against this commitment we are currently working with a limited number of brokers, and have not yet gone to the whole market. If you have already registered with us please continue to log in under the Intermediary login.

If your Firm is already part of the TSB Portal and you need to register, please use the 'Register for TSB Intermediary' link below. If you have not yet registered with us and would like us to contact you with more information, please leave your details by using 'Contact Us' and we'll be in touch. If you are already registered with TSB, please click on 'forgot my password' to reset your security to use our new system.

[Register for TSB Intermediary](#)

If you are unable to login and continue with the Case within their Portal within the 20 minutes, you will be provided with a **Resend DiP Data** button within APPLY.

Create New Case

Once you have logged in to the TSB Intermediary Portal, you should check that the information is correct, and click **Create case**.

Please remember that you have 20 minutes to login and Create the Case within the TSB Intermediary Portal.

Create new case

Information has been received to initiate the creation of a case for ABC DEF and GHI JKL to the value of £117,000. Please complete the following and click Create Case if you wish to continue.

Please select

Application type

New Purchase

Remortgage

Property purpose

Owner Occupation

Second Property

Buy to Let

Before you proceed

Payment route

Please select... ▼

Please confirm that the following statements apply to the application:

- Maximum term 40 years
- The applicant(s) are aware of how their information will be used. They have given consent for a credit score to be performed (excluding Product Transfers). Please see 'Use of my information' link below
- Lending not available in Northern Ireland, Isle of Man or Channel Islands (except for essential repairs and product transfers)
- Minimum property value: £40,000 for residential; £50,000 for buy to let (excluding additional borrowing)
- Customer must be resident in the UK (except for essential repairs and product transfers)

I confirm that all of the above statements apply

I confirm that all applicants have consented to my acting on their behalf

I confirm that I have read 'Use of my Information' to the applicant(s) and they agree to their information being used in the way specified: [here](#)

Applicant list

Applicant	Applicant type
ABC DEF	First Time buyer ▼
GHI JKL	First Time buyer ▼

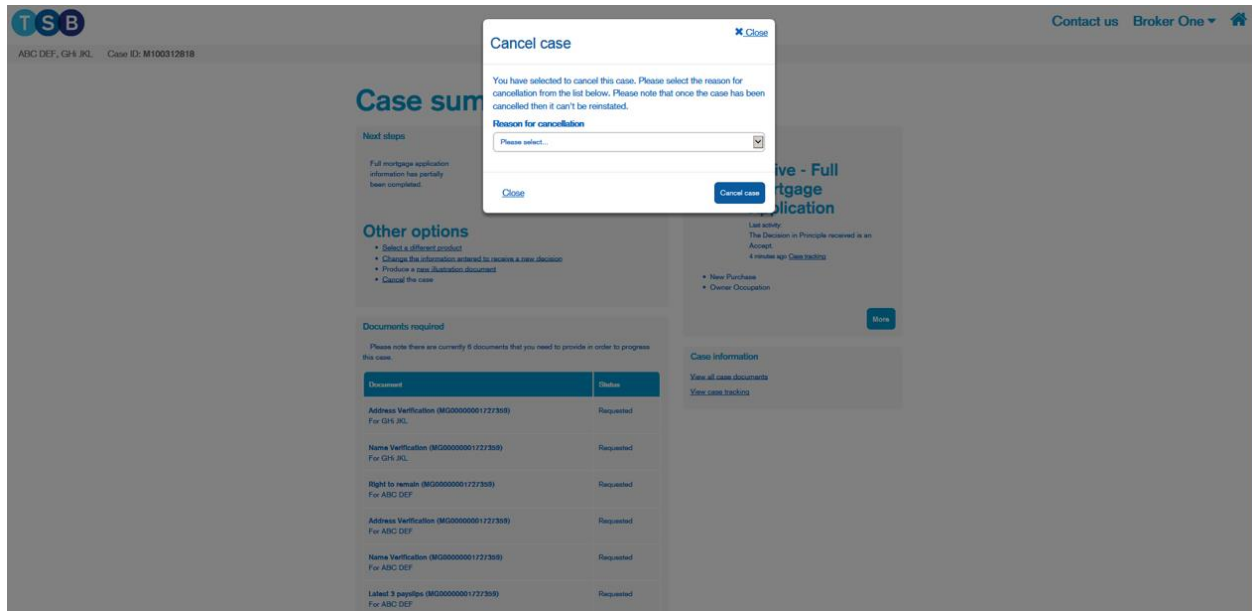
Cancel

Create case

Cancel Create New Case

Within the TSB Intermediary Portal, you can cancel the case from within the Case Summary. If you choose to cancel the Case creation, the data that was sent from APPLY to TSB will be deleted.

You will need to re-submit from APPLY to start the journey again.



Notes

Successfully transferring the data to TSB ends the journey within APPLY and enables you to continue within TSB's Intermediary Portal.

Converting a DiP to an FMA

The TSB APPLY integration supports the submission of data to begin a Case with the Lender, and therefore does not support FMA's.

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.