



Integration Guide

Leeds Building Society

Application Types






-  Decision In Principle

Customer Types

Supported

- Residential Purchase
- Residential Remortgage
- Help to Buy Equity Purchase
- Standard BTL Purchase inc. HMO
- Standard BTL Remortgage inc. HMO Let To Buy
- Portfolio Landlord Purchase
- Portfolio Landlord Remortgage
- Shared Ownership
- Right to Buy Purchase
- Purchase from a Family Member
- Second Property
- Retirement Interest Only

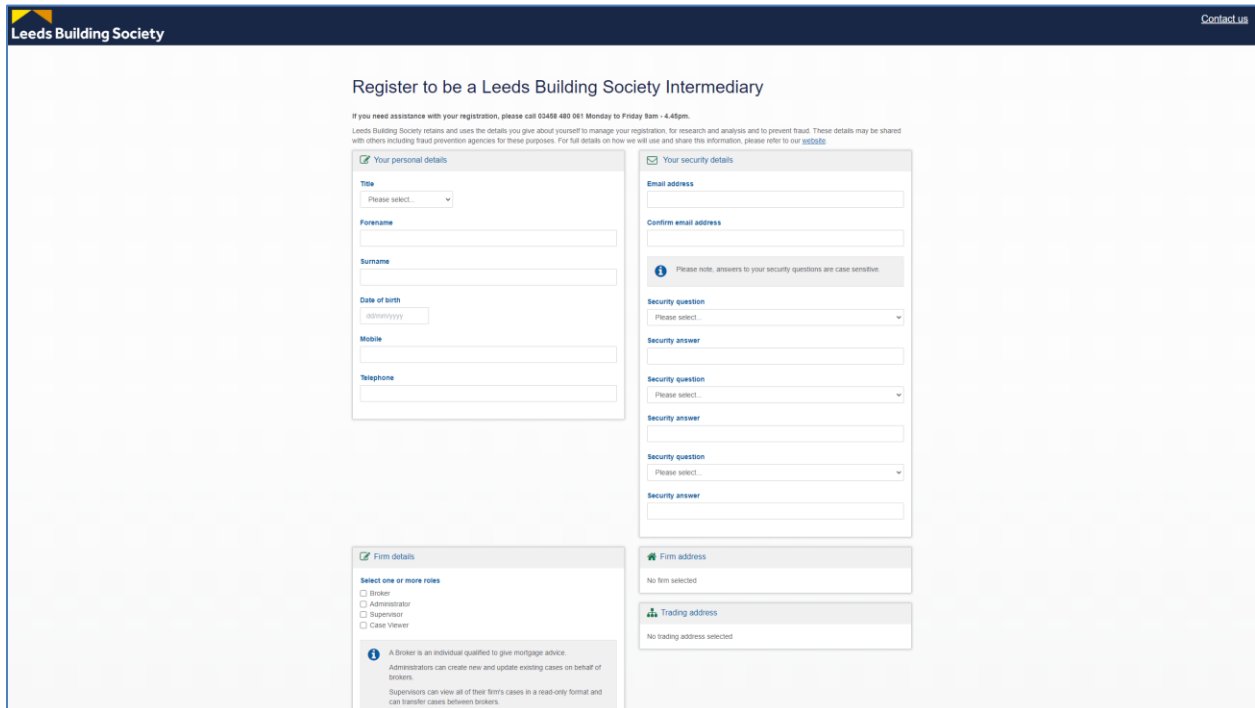
Features

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

Registration

Leeds Building Society requires that you have an existing login to <https://intermediary.mortgagehub.leedsbuildingsociety.co.uk/> before you can submit cases via APPLY.

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



The screenshot shows the registration page for Leeds Building Society Intermediaries. The page title is "Register to be a Leeds Building Society Intermediary". It includes a header with the Leeds Building Society logo and a "Contact Us" link. The main content area contains several sections:

- Your personal details:** Fields for Title (dropdown), Forename, Surname, Date of birth (dd/mm/yyyy), Mobile, and Telephone.
- Your security details:** Fields for Email address, Confirm email address, and three Security questions (each with a dropdown for the question and a text field for the answer). A note states: "Please note, answers to your security questions are case sensitive."
- Firm details:** A section titled "Select one or more roles" with checkboxes for Broker, Administrator, Supervisor, and Case Viewer. A note explains: "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."
- Firm address:** A field for "No firm selected".
- Trading address:** A field for "No trading address selected".

Processing

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

Intermediary Information

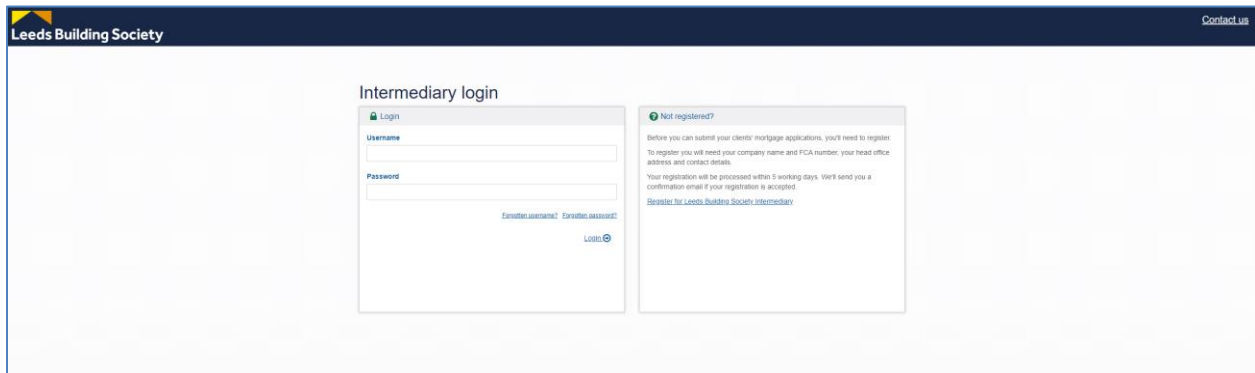
It is imperative that the 'Email' and 'FRN' information that you enter into the **Intermediary Information** of the DiP, is the same information that Leeds have on record for you. Entering an incorrect FRN could result in the transfer of data not working correctly.

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 Leeds.

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 LBS Intermediary Login page. If you are not automatically redirected to the LBS Portal, simply click the link in the blue banner at the top of the APPLICATION SUMMARY page.



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 LBS Intermediary Portal, you should check that the information is correct, select your **Payment route**, agree to the terms and conditions, and click **Create case**.

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

Leeds Building Society Contact us William Adams ▾

Create new case for Leeds Building Society

Information has been received to initiate the creation of a case for Emily Sunshine and Geoffrey Pinder to the value of £150,000. 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

Applicant list

Applicant	Applicant type
Emily Sunshine	Borrower with other lender ▾
Geoffrey	

Before you proceed

Payment route

Please select... ▾

Please confirm that the following statements apply to the application:

- Where the property is a flat it meets lending criteria.
- All income and assets that will be used to repay the mortgage (including both the monthly repayments and where applicable any final capital sum) must and will be in GBP Sterling.
- The property is not adjacent to or above commercial premises.
- The property is standard construction (Brick/Stone walls with Slate/Tiled roof).
- I have read and printed the full Intermediary Terms of Business (PDF) which forms a legal contract between you and us, I have also read and printed the Intermediary Fair Processing Notice (PDF) and would like to proceed.
- The property is not a self build.
- The property will be the applicant's primary residence at completion of the loan and for the term of the mortgage.
- You must advise us if the applicant(s) are currently on furlough.

I confirm that all of the above statements apply

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

Leeds Building Society Contact us William Adams ▾

Please select

Application type

New Purchase
 Remortgage

Property purpose

Owner Occupation
 Second Property
 Buy to Let

Applicant list

Applicant	Applicant type
Emily Sunshine	Borrower with other lender ▾
Geoffrey Pinder	Borrower with other lender ▾

Before you proceed

Payment route

Please select... ▾

Please confirm that the following statements apply to the application:

- Where the property is a flat it meets lending criteria.
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- You must advise us if the applicant(s) are currently on furlough.

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: - to amend later? [here](#)

Leeds Building Society [Contact us](#) [Lending policy](#) [William Adams](#)

Emily Sunshine, Geoffrey Pinder Case ID: U20124399 [Case summary](#) [Get an illustration](#)

Running completeness check...

Loan requirements

Deposit details

Emily Sunshine

Personal details

Address history

Current income

Geoffrey Pinder

Personal details

Address history

Current income

Committed expenditure

Household expenditure

Future changes

Existing properties

Submit for decision

Loan requirements

Property

Property location

England

Scotland

Northern Ireland

Wales

Property region

North East

Has the applicant(s) located the property they wish to buy?

Yes No

Property Type

Self Contained Studio Flat

Is the property a new build (are you the first owner/occupier since the property was built/converted to its current state)?

Yes No

Will any of the applicants have legal ownership of any properties other than the

Property ownership type

Standard

Shared Ownership

Right to Buy

Shared Equity (incl. Help to Buy)

Purchase from Family Member

Purchase price

£ 250,000

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Emily Sunshine, Geoffrey Pinder Case ID: U20124399

Case summary

Next steps

ⓘ A new case has been created. [Get an illustration](#) or [Get a decision](#)

Other options

- Produce a [new illustration document](#)
- [Cancel the case](#)

Documents required

There are currently no documents that you need to provide in order to progress this case.

Overview

1/13 **Active - Created**

Last activity: The case has been created by William Adams from Lender Connect. a few seconds ago [Case tracking](#)

- Leeds Building Society
- New Purchase
- Owner Occupation

Case information

[View case tracking](#)

Cancel Create New Case

If you choose to cancel the Case creation, the data that was sent from APPLY to Leeds will be deleted.

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

Notes

Successfully transferring the data to LBS ends the journey within APPLY and enables you to continue within their Intermediary Portal.

Converting a DiP to an FMA

The Leeds Building Society APPLY integration supports the submission of data to begin a DiP 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.