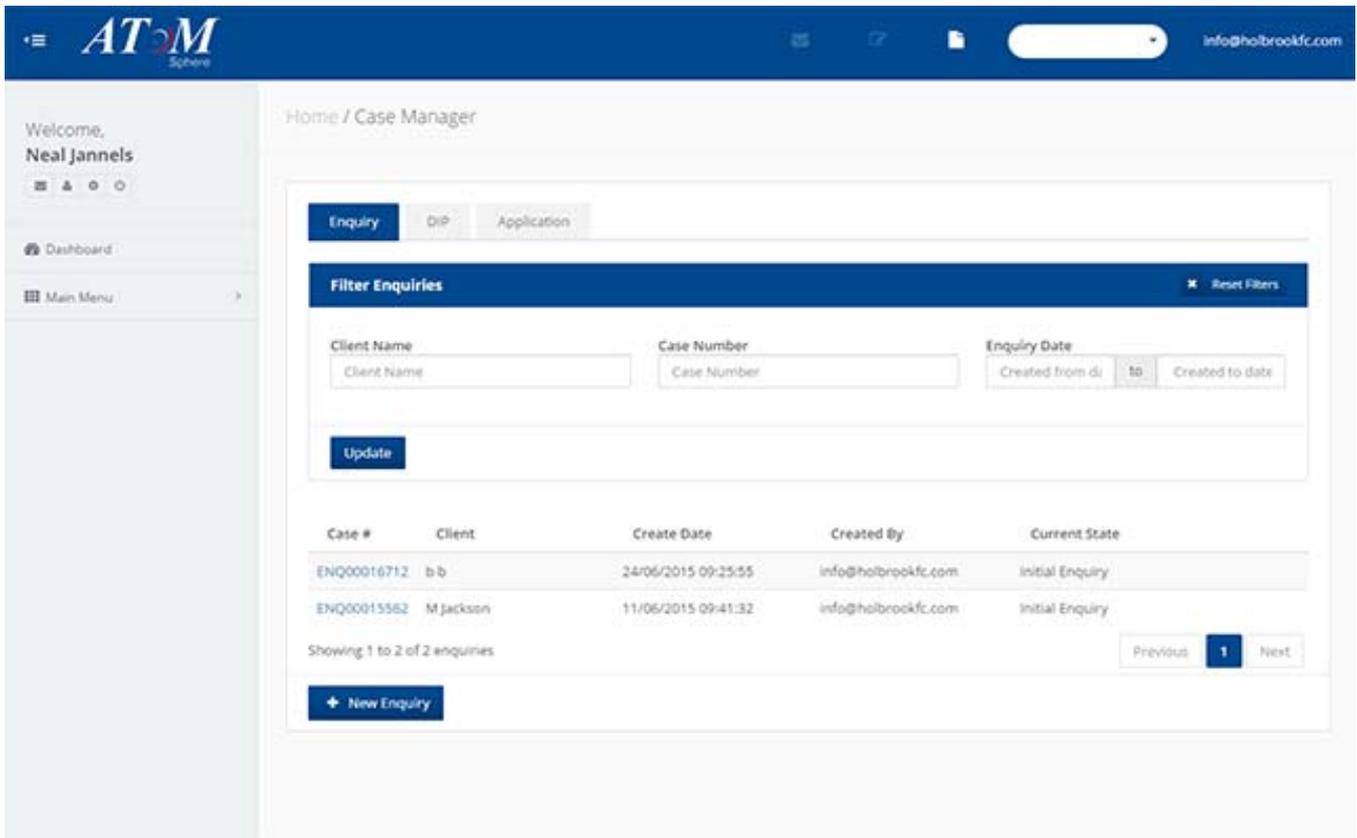


Enquiries

Submitting a new enquiry

To add a new enquiry to the system, press on Main Menu on the left hand side of the screen and then click on “Cases” from the drop down menu.



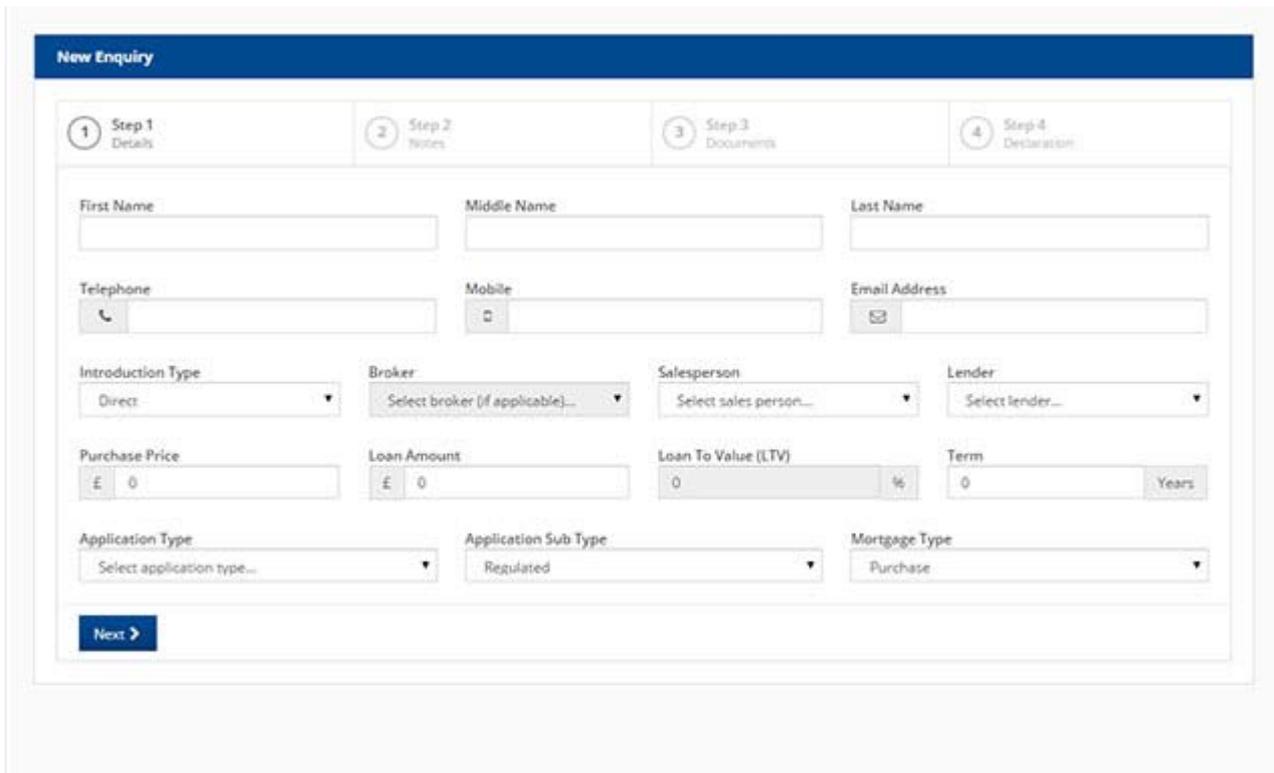
The screenshot shows the AToM Together Case Manager interface. The top navigation bar includes the AToM logo, a search bar, and the email address info@holbrookfc.com. The left sidebar displays a welcome message for Neal Jannels and navigation options for Dashboard and Main Menu. The main content area is titled 'Home / Case Manager' and features a 'Filter Enquiries' section with input fields for Client Name, Case Number, and Enquiry Date, along with an 'Update' button. Below the filter section is a table of enquiries:

Case #	Client	Create Date	Created By	Current State
ENQ00016712	b b	24/06/2015 09:25:55	info@holbrookfc.com	Initial Enquiry
ENQ00015562	M Jackson	11/06/2015 09:41:32	info@holbrookfc.com	Initial Enquiry

Below the table, it indicates 'Showing 1 to 2 of 2 enquiries' with 'Previous' and 'Next' navigation buttons. At the bottom of the interface, there is a '+ New Enquiry' button.

Scroll down to New Enquiry and press the button. This will be at the bottom of the screen.

The new enquiry screen will load. The Enquiry process consists of four steps during which you can add documents and notes before you formally submit your complete enquiry to the system.



New Enquiry

Step 1 Details Step 2 Notes Step 3 Documents Step 4 Declaration

First Name: Middle Name: Last Name:

Telephone: Mobile: Email Address:

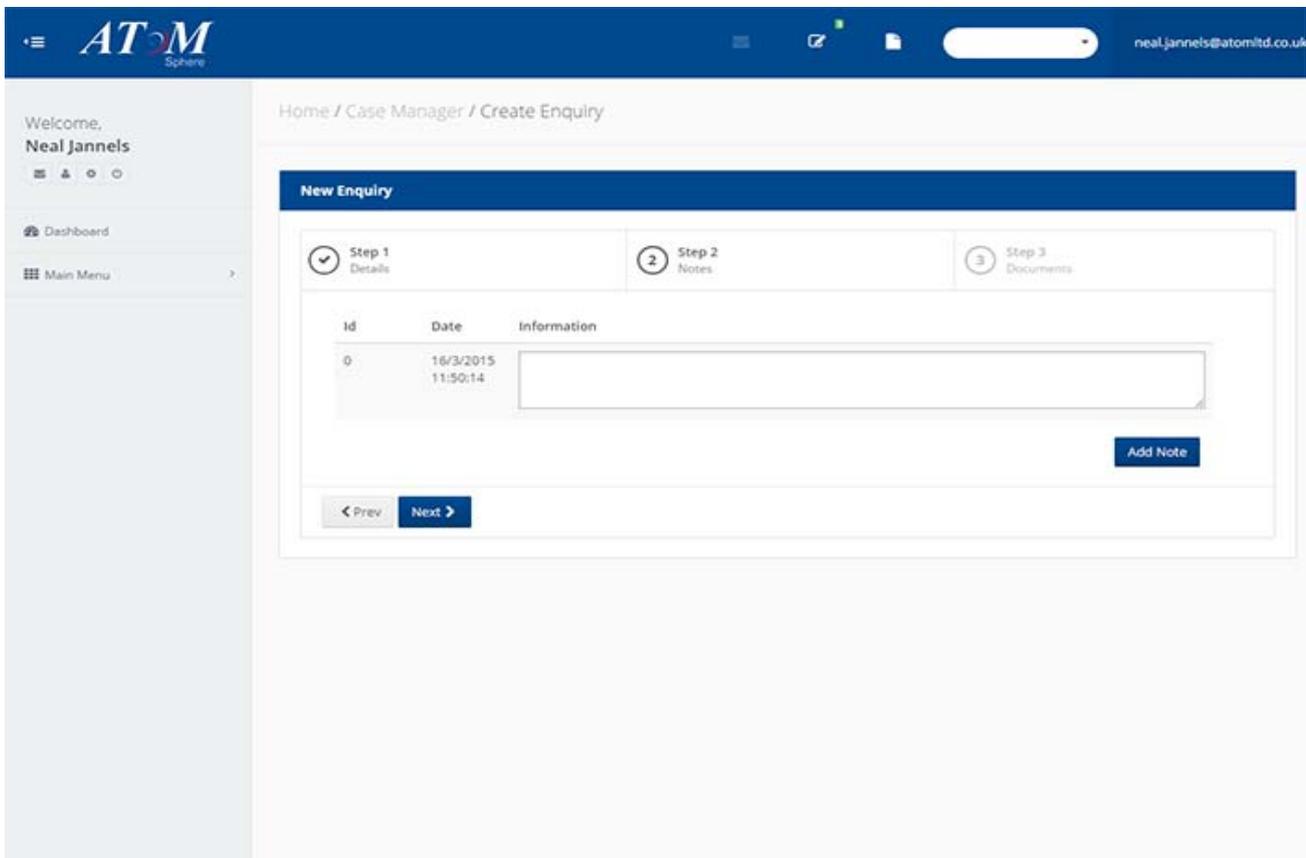
Introduction Type: Broker: Salesperson: Lender:

Purchase Price: Loan Amount: Loan To Value (LTV): % Term: Years

Application Type: Application Sub Type: Mortgage Type:

[Next >](#)

1. Complete all fields and press Next to proceed to the notes screen.



Home / Case Manager / Create Enquiry

New Enquiry

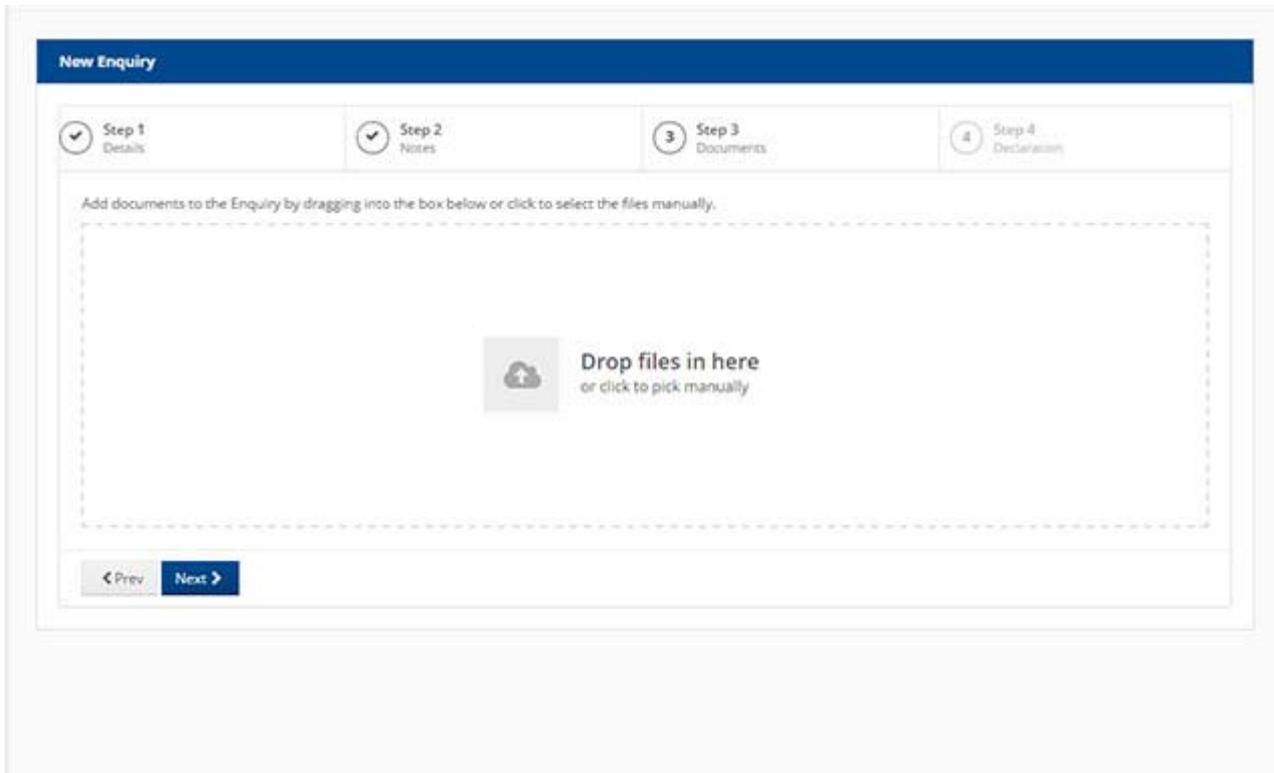
Step 1 Details Step 2 Notes Step 3 Documents

Id	Date	Information
0	16/3/2015 11:50:14	<input type="text"/>

[Add Note](#)

[< Prev](#) [Next >](#)

2. Input any notes / information relating to the Enquiry. You are free to add as many notes as you would like.
3. Once you have pressed next, you will arrive at the documents screen. You can upload any relevant documents to this enquiry here. Please make sure your documents have loaded correctly. A green bar will appear with a green tick. REMEMBER – large files take longer to load.



New Enquiry

Step 1 Details Step 2 Notes **Step 3 Documents** Step 4 Declaration

Add documents to the Enquiry by dragging into the box below or click to select the files manually.

Drop files in here
or click to pick manually

◀ Prev Next ▶

4. Once you have uploaded your documents. Press the next button to the declaration. Read the Declaration and tick the box to confirm then press create.

New Enquiry

Step 1 Details Step 2 Notes Step 3 Documents **4** Step 4 Declaration

Disclaimer

I confirm being qualified to provide advice / recommendation and I am appropriately registered / authorised under the Financial Conduct Authority. I declare that all necessary information within this enquiry is provided to AToM with the permission of the client/s for the use in obtaining a possible decision in principal. I declare all the information provided is accurate, having been obtained and checked as far as possible. I understand that AToM can only process and provide possible outcome/s based on the details I have provided. I consent to, and declare, I am aware the information I have provided will / may ultimately be used in the completion / pre-population of any Submission /Decision in Principal / Application. These forms may subsequently be submitted to the Lender, once indicated by me. I confirm I have interviewed the client/s in accordance with an approved and compliant process duly fulfilling my regulatory and legal obligations. Where all client(s) are not present: I confirm that I am acting as an agent for the absent applicant(s).

NOTE - AToM cannot be held responsible for any undisclosed / inaccurate information that materialises and / or subsequently effects any decision in principal /approval.

The Enquiry will now have been created.

On receipt of the Enquiry within AToM, we will acknowledge receipt. This process will include an email and text message being sent to you, keeping you updated on the progress of your enquiry / case.