

Submit a DIP on

impactPortal is your easy-to-use broker CRM system for submitting, tracking, and controlling your client applications. The system has a host of features to help save you time and assist in managing your cases throughout the application process. To help get you started, below are the steps to submit a DIP to impact packaging.

01

Search impactpackaging.co.uk

Scroll to the bottom of the page until you see **Place. Source. Track with *impactPortal***

Place. Source. Track. with *impactPortal*

impactPortal is the only resource you'll need for placing, sourcing, and tracking your cases. This user friendly CRM system provides you control of your clients' applications. Our system has a host of [features](#) to help save you time and assist in managing your cases throughout the application process.

Login

login to impactPortal

Register

register to use impactPortal

02

Register your account

Click **Register** > Fill out the required details.

Once completed, **login to *impactPortal***.

Returning customers can skip this step and **login**.



Mortgage Distributor

Mortgage Packager

Mortgage Broker

version: 4.3.4

Login to your account

Username or email

Password

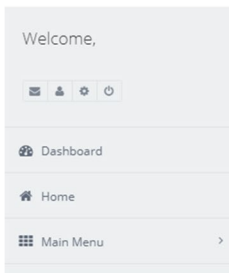
Log in

[Forgot your password?](#)

03

You are now in the Dashboard

On the left is a menu bar showing:
Dashboard, Home and Main Menu



04

Create a new DIP

Click on **Main Menu** > Click **Cases**.

This is where you can search for your cases, as it is your first time this section will be empty.

Scroll to the bottom of the page. Find and click the **Action** button > click **New Mortgage DIP**

New Enquiry

New Mortgage DIP

Action

05

Submit the DIP

Fill in your case details.

Click **Save/Next** at the top or bottom of the page and continue to fill out the form until you see a **submit** button.

1 Loan Details

Back Save / Next

Application Type* Select application type..	Application Sub Type Regulated
Mortgage Type Purchase	Loan Purpose Select...

06

Process your Case Enquiry

We will now get in touch with you using the details provided on your registration. We usually get back to you same day.

Our standard office hours are Monday to Friday, 9 am to 5:30 pm.



TIPS!

- Make sure details are correct first time to prevent any delays!
- Make as many notes as possible in the case summary section on the New Mortgage DIP page, so our sales consultants can pick up your case with ease.
- Upload any credit files for your adverse cases, or any supporting documents that may be needed.

Call on **01403 272625** or email **info@impactsf.co.uk**