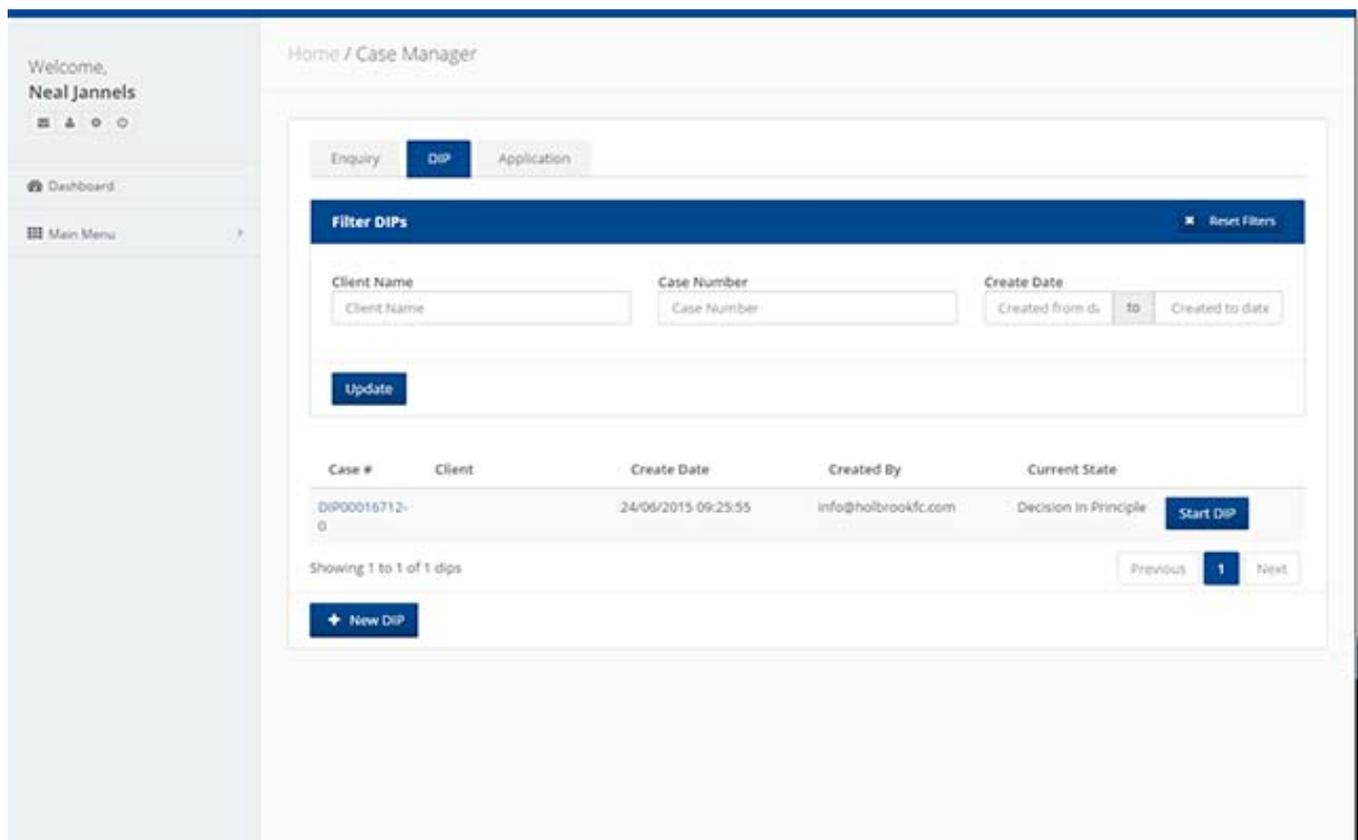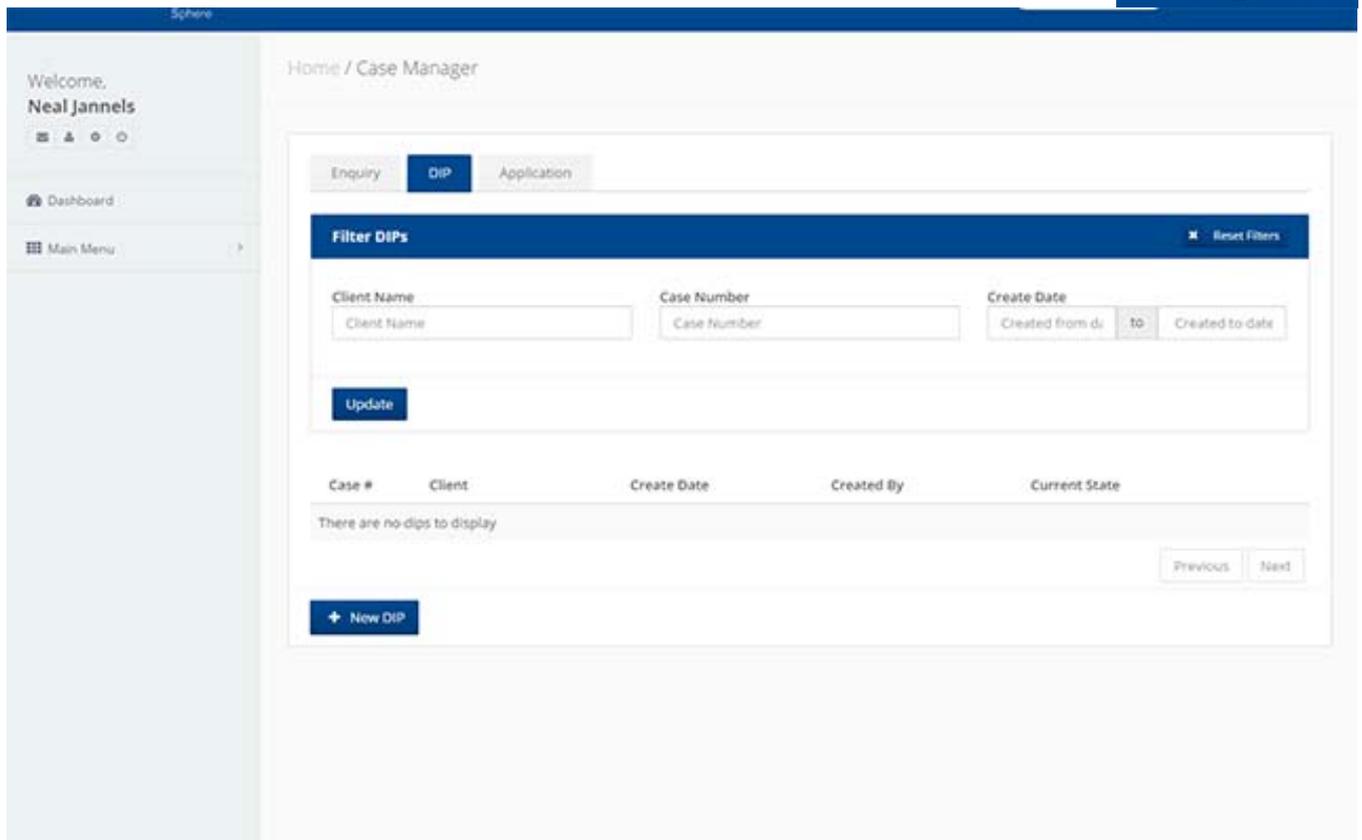# Decision In Principles (DIP)

Submitting a new DIP

To add a new DIP 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. You then need to click on the DIP tab at the top of the screen.

PLEASE NOTE - IF YOU ORIGINALLY SUBMITTED AN ENQUIRY AND WE ADVISED WE CAN PROCEED. THIS WOULD HAVE ALREADY BEEN CREATED AS A DIP FOR YOU AND YOU WILL BE ABLE TO PRESS START DIP ON THE RIGHT HAND SIDE IN LINE WITH YOUR CASE / CLIENT AND FOLLOW THE WORKFLOW BY PRESSING START DIP.

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

The new DIP screen will load. You are able to add documents and notes before you submit your completed DIP to the system. If the DIP was originally an enquiry, then all documents and notes will have been copied over automatically.

Complete the relevant fields and press Next to proceed to the notes screen.

Complete the files here.

Please note - You maybe unsure of the lender at this stage, if so, please select the Unknown option from the drop down.

Complete the details and press the Next button to proceed to the applicants screen.

You can vary the number of applicants to suit your requirements and complete the fields displayed.

Some questions, if answered yes, will produce additional fields that will require your completion.

A postcode finder is built into the system. Therefore to save time when inputting the address, just input the postcode and press the Lookup Button.

Once all the relevant fields have been completed, then please press the Next button to proceed to the employment section.

The employment page displays details depending on the employment status selected.

If you wish to add a secondary employment, please press the Add new button.

Complete the fields displayed and press the Next button to proceed to Credit Commitments.

The credit commitments page allows you to add all the commitments the clients have. You can add as many as required.

Please ensure this section is fully completed.

Once all the relevant fields have been added, please press the Next button to go to the Property Details.

The property page will show fields depending on the information supplied. Please make sure all the relevant information has been completed.

If the application is for a remortgage, then a copy button will appear to allow you to copy the address to this page. There is also a postcode finder as well to save you time.

Once all fields have been completed, please press the next button to proceed to the Budget Planner.

The Budget planner is a four step process and is required for all lenders on our panel. Please make sure you enter monthly figures into this.

The DIP is automatically saved once you press the Next button to move screens, so if you do not have this information for the budget planner, you can come back to it later once obtained.

Once completed press the next button to go to the Notes screen.

Add any notes here regarding this DIP. If the DIP has been converted from an Enquiry, then the previous notes will be displayed here as well.

Once the DIP is being process by our Sales team, any notes they add will show on this screen and you will be able to keep yourself updated with the progress of the DIP.

Once you have added your notes, press the Next button to continue to documents.
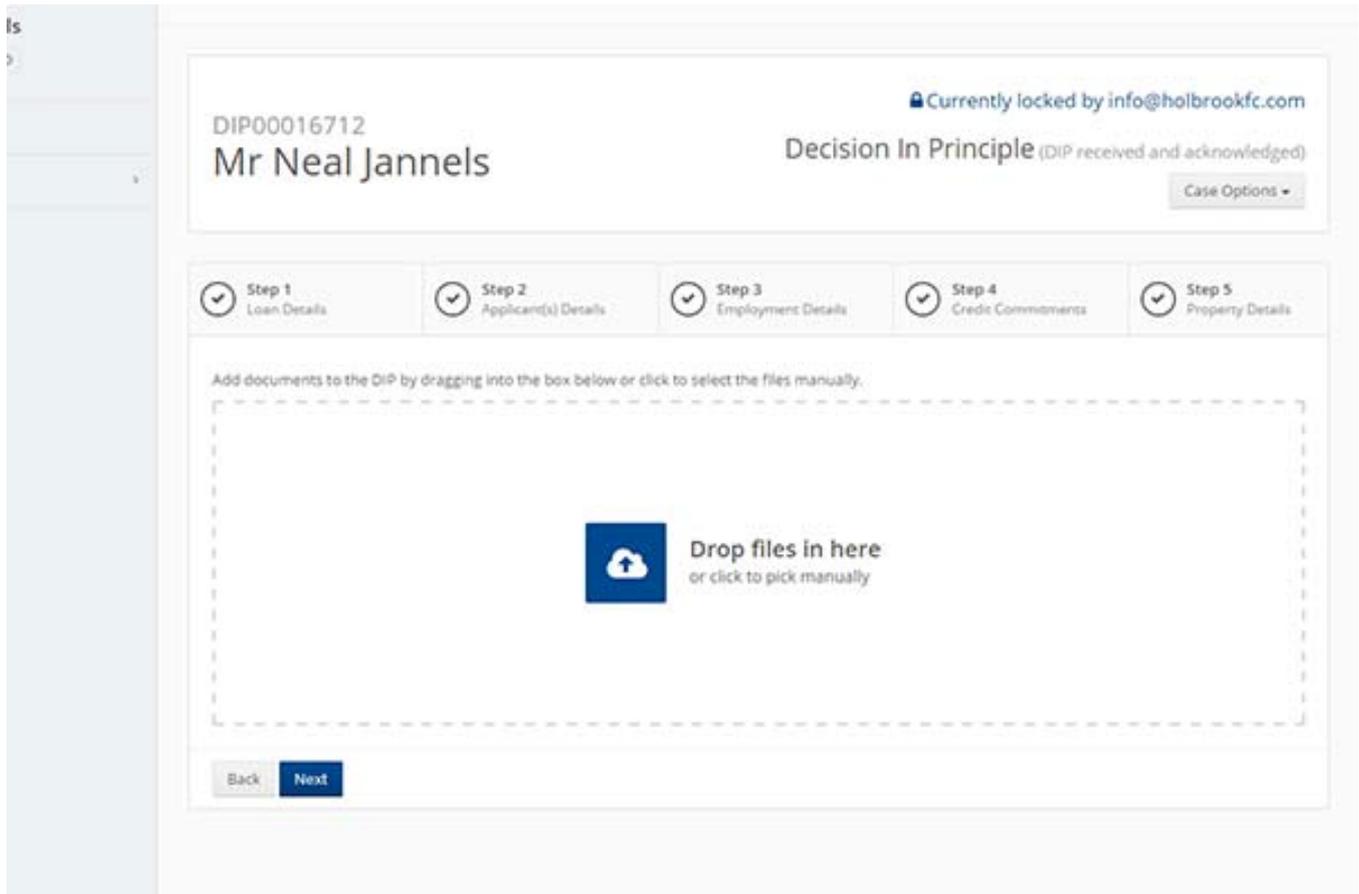
You can upload any relevant documents to the DIP here. Please make sure your documents have loaded correctly. A green bar will appear with a green tick. REMEMBER – large files take longer to load.

Once you have uploaded your documents, press the Next button to proceed to the disclaimer

Please read the disclaimer and tick the box in the left corner to confirm you have read it.

Pressing submit will send the DIP to us. Please wait for the system to reload before changing screens.

Once the DIP has been submitted, no amendments can be made.

You can add notes and extra documents by pressing on the relevant tabs and you can run through the screens to make sure the information is correct.