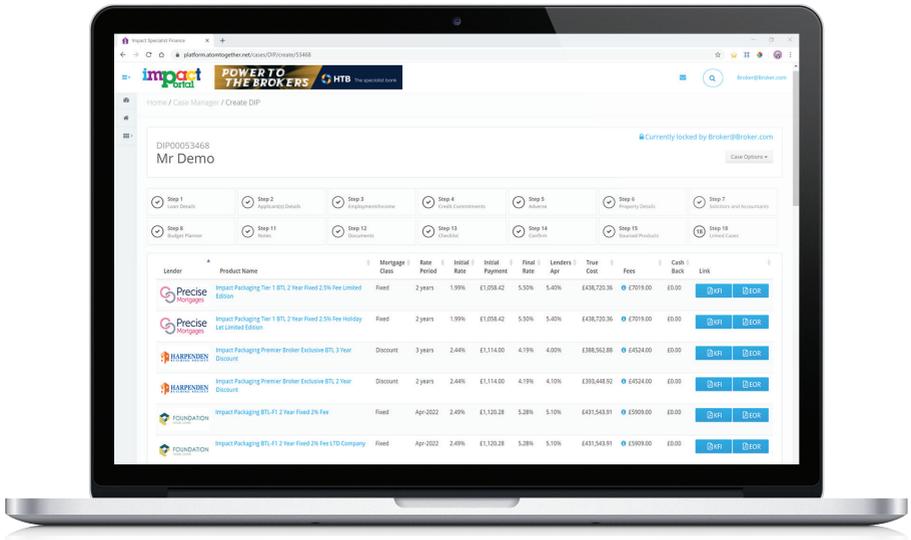


# impact portal



## Where Technology Meets Mortgages

- Integrated Sourcing •
- Lender Integration •
  - Case Tracking •
  - Online Fact Find •
- Pre-Populated Application Forms •

Integrated Packages Include:



[impactportal.co.uk](https://www.impactportal.co.uk)

impact Portal is the only resource you'll need for placing, sourcing and tracking your specialist cases.

Here's Why...

Track all your cases from simple enquiries all the way through to completed applications.

Integrated sourcing across our entire panel of specialist lenders. Residential, BTLs, Ex-pats and more! We've built in combined sourcing as well.

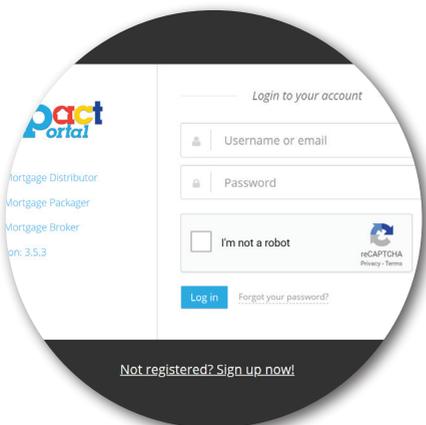
The ability to generate both KFI's and Evidence of research for any and all products that your enquiries may source.

Case workflows mean you can keep up to date with your applications and where they are just by logging in.

Changing Lender? No problem, once the information has been input once, you can switch lenders with ease as well as copying the case for your clients second, third or fourth applications.

Pre-populated application forms for each of our lenders will save you time and energy.

24/7 access allows you to check the status of your case whenever you want, wherever you are. Lender integration allowing you to receive a full lender DIP response from just one input.



## How to register

Go to [impactportal.co.uk](https://impactportal.co.uk)

Click the **Not registered? Sign up now!** link, click **Mortgage Intermediary** and complete your details.

You can now log in to impact Portal and begin placing and sourcing your cases.

No need to wait for a confirmation email just get going immediately.

1

**USING IMPACT PORTAL**

This is the impact Portal home screen



Your Dashboard, where you can track all your impact Portal statistics, manage cases and check your impact Portal mailbox.

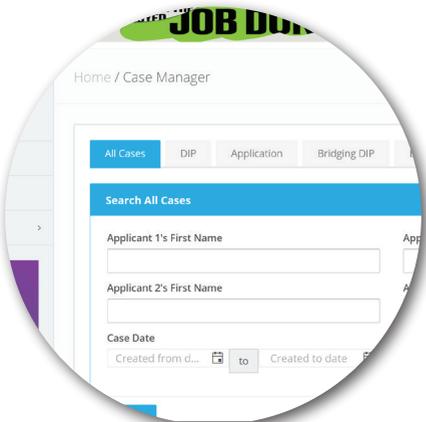
Your case overview where you can view, enter and check the status of your DIPs and applications.

The impact Portal reset button, this brings you back to the home screen from wherever you are in impact Portal and acts as reset if your session times out.

2

**CASE OVERVIEW & SUBMITTING CASES**

This is the case overview screen. Here you can see all your cases with impact Portal.



You can filter your cases by their status using the tabs highlighted at the top of the screen.

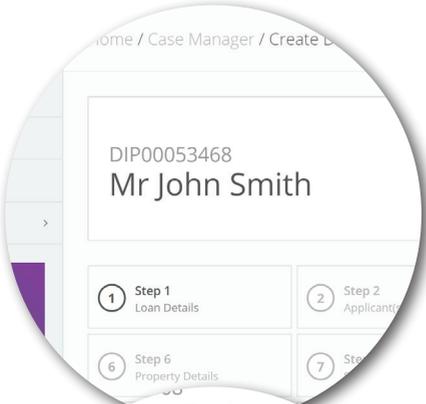
Using these tabs, you can also submit new cases in your personal timeline.

If you wish to source products, generate KFI's, or for impact to package a case to a lender, please submit a DIP.

The new enquiry or new DIP button will appear at the bottom of the screen.

3

**NAVIGATION MENU**  
Below is the DIP navigation menu:



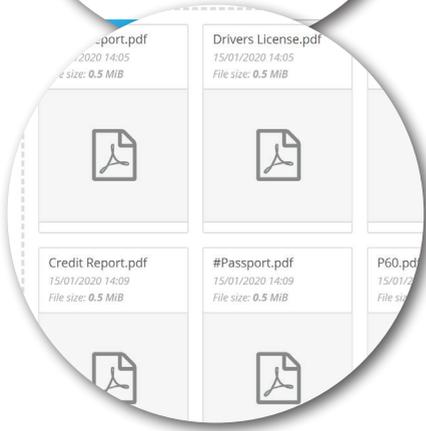
**Case Reference**

Highlighted at the top is the case reference number and the clients name, to help identify the case.



**DIP tab Navigator**

Clicking on one of these steps will take you to the relevant section of the DIP without needing to navigate through the entire process.



**Document Upload Feature**

This is present in all stages of any DIP or application.

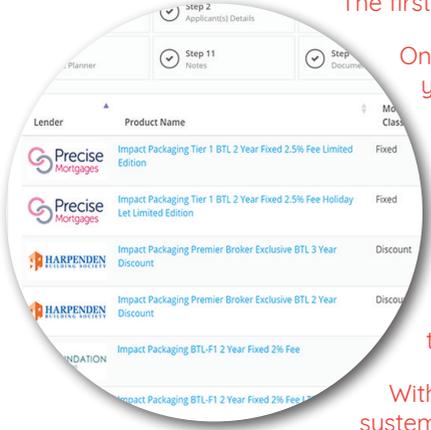
Simply drag and drop a file or group of files from your folder or click the highlighted icon in the middle of the screen and browse your files.

4

**SOURCING PRODUCTS, GENERATING KFIS/ESIS & EOR**  
 impact Portal allows you to do all the above free of charge all in one place, with only a single click!

The first thing you need to do is submit a DIP.

Once you have submitted your completed DIP you will automatically be able to view a list of your sourced products. The more complete the DIP the more accurate the sourcing.



From this list of products, you can generate the KFI/ESIS and Evidence of Research for as many products as you like. The list also provides complete information on product specific criteria and all fees appropriate to that product.

With every KFI/ESIS created, you will note that the system automatically saves this in the documents folder and adds an update to the notes section.

Fields to the right provide:

- Product information, full fee information
- KFI/ESIS and EOR generation buttons
- Generating Pre-Populated Application Forms case options



Additional product details are found by simply clicking on the product name.

Combined sourcing is also available.

In the Case Options, for lender integration, a further option will appear confirming 'Generate DIP'. Beware that this will register a full credit search against the client.

5

**GENERATING PRE-POPULATED APPLICATION FORMS**

We know how frustrating it can be to repeatedly input your client's information.

With impact Portal you will only need to input this information once!

Once your DIP has been agreed with the lender, their application form will be generated and pre-populate all the information from your general input.

Our pre-populated application pack comes with a submission checklist for all documents required by the lender and impact.

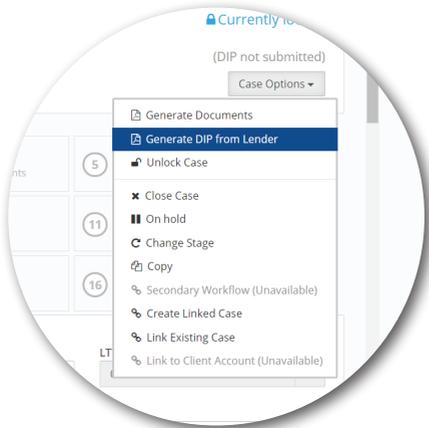
Login to the case for the required application form, click the highlighted **Generate Documents** button and your document will be automatically generated!



6

## INTEGRATING WITH LENDERS & THIRD PARTY PROVIDERS

With some of our specialist lenders, you can send all the information input on our system directly into the lenders.



With some of our specialist lenders, you can send all the information input on our system directly into the lenders system, without the need for further rekeying.

Simply go to 'Case Options' and click on the 'Generate DIP from Lender' option.

Be patient, as some of these can take up to a couple of minutes to get a response back.

Once complete, the system will confirm in a big central box on screen with further instructions on what to do next.



iPipeline is the industry's leading provider for Protection Quoting and Direct Applications to providers.

On completing Step 3, the Employment/Income section, a PreQuo window will pop-up with an indicative monthly figure.

PreQuo can be activated free of charge but provides limited illustrative functionality only. SolutionBuilder requires a license but provides the full suite of features.

Contact us to find out more.

# impact

Specialist Finance

## APPROVED PACKAGER FOR



### Integrated Packages Include:



- extra subscriptions may be required -



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YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE