



A To M Together

WHERE TECHNOLOGY
MEETS MORTGAGES

INTEGRATED SOURCING
LENDER INTEGRATION
POPULATED APP FORMS
GENERATE KFIS + EOR
CASE TRACKING
DOCUMENT UPLOAD
24/7 ACCESS
AND MORE!

AToMTogether is the only resource you'll need for placing, sourcing and tracking your specialist lending 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 by just logging in.
- Changing lender? No problem, once the information has been inputted 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.
- Integrated with lenders allowing for a quick and simple DIP decision in minutes.
- 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.
- Instant updates keep you informed whenever your case progresses.



Registration

Getting access to **AToMTogether** is as **quick** and **easy** as using the system itself.



Go to
www.atomtogether.co.uk

Press the **REGISTER** button
in the centre of the screen.

Fill in your details and submit.

You can now log in to **AToMTogether**
and begin placing and sourcing
your cases. No need to wait for
confirmation emails just get
going immediately!

01

Using **AToM** Together

This is your **AToMTogether** Home screen.

Highlighted in Red:

- Your Dashboard, where you can track all your **AToMTogether** statistics, manage cases and check your AT mailbox.
- Your case overview where you can view, enter and check the status of your, DIPs and Applications.
- The **AToMTogether** reset button, this brings you back to the home screen from wherever you are in **AToMTogether** and also acts as reset if your session times-out.

02

Case Overview and Submitting Cases

This is the case overview screen: Here you can see all your cases with AToM.

- 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 KFIs, or for AToM 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 and look like this:

+ New DIP

Below is the DIP navigation menu:

- Highlighted at the top is the case reference number and the clients name, to help identify the case.
- Highlighted below is the DIP tab navigator, clicking on one of these will take you to the relevant section of the DIP without needing to navigate through the entire process.

The screenshot shows the AToM Together interface for a Decision In Principle (DIP). The top navigation bar includes the case reference number 'DIP00017' and the client name 'Mr DEMO'. The main navigation menu is highlighted with a red box, showing steps 1 through 12. The 'Step 1 Loan Details' and 'Step 2 Applicant(s) Details' are currently selected. The 'Current Task' section indicates that the 'Sanction search/FCA register check' has been completed and added to the case. The 'Current Stage' is 'Decision In Principle'. The 'Assigned To' field shows 'Neal Jannells <neal.jannells@atomtd.co.uk>' with a date of '02/08/2017'. The 'Loan Amount' field is also visible. Below the navigation menu, a table lists the 'Sourced Products' with columns for Lender, Product Name, Mortgage Class, and Initial Rate Period. The table shows three entries from 'KenReliance'.

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.

Sourcing Products, Generating KFI & Evidence of Research

AToMTogether allows you to do all of 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 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 created, you will note that the system automatically saves this in the documents folder and adds an update to the notes section.

The highlighted fields to the right provide:

- The product information, full fee information (inner right).
- KFI/Evidence of Research generation buttons (outer right).
- 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.

Lender	Product Name	Mortgage Class
KentReliance	ATOM BTL 2 Year Discount 1.5% Fee Specialist	Discount
KentReliance	ATOM BTL SPV LTD Company 2 Year Discount 1.5% Fee Specialist	Discount
KentReliance	ATOM BTL SPV LTD Company 2 Year Fixed 1.5% Fee Specialist	Fixed
Precise Mortgages	ATOM Tier 1 BTL 2 Year Fixed 1.5% Fee HMO (Ltd Co)	Fixed
FOUNDATION	ATOM BTL Specialist HMO 2 Year Fixed 2% Fee	Fixed

Generating Pre-Populated Application Forms

00017
Mr DEMO

Current Task: Sanction search/FCA register check completed and added to case
Current Stage: Decision In Principle
Assigned To: Neal Jannels <neal.jannels@atomltd.co.uk>
Due Date: 02/08/2017

1 Step 1 Loan Details	2 Step 2 Applicant(s) Details	3 Step 3 Employment
5 Step 5 Property Details	6 Step 6 Budget Planner	7 Step 7 Mortgage
9 Step 9 Confirm	10 Step 10 Sourced Products	

- We know how frustrating it can be to repeatedly input your client's information, however with AToMTogether 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 of the information from your original input.
- Our pre-populated application pack comes with a submission checklist for all documents required by the lender and AToM.

Sanction search/FCA register check completed and added to case

Case Options ▾

- Generate Documents
- Generate Shawbrook Case
- Unlock Case
- Close Case
- On hold
- Change Stage
- Copy

10 Step 10
Sourced Products

- Login to the case for the required application form, click the highlighted blue button and your document will be automatically generated!
- All our application forms can be edited allowing you to input the information directly. Or if you prefer you can print the application form and complete it manually.

Application form -
Shawbrook Partnership

AToM
Precise
Mortgages

Advised ☐ Execution only ☐

Company name AToM (All Types of Mortgages Ltd)

Application reference number (confirmed on your RMO):

Applicant's name DEMO

SHAWBROOK

Thank you for applying for a mortgage

To move to Formal Mortgage Offer, we require this application for complete any of the sections, your broker will be happy to assist

1. BROKER PARTNER DETAILS
Company name AToM (All Types of Mortgages Ltd)

2. APPLICATION DETAILS
Application reference number (confirmed on your RMO):

Applicant's name DEMO

AToM *Together*



01403 27 26 25

atomtogether.co.uk

ATOM

All Types of Mortgages Ltd

Approved packager for.



Products available on.



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atomtogether.co.uk

24 Carfax | Horsham | West Sussex | RH12 1EB

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