

## How To Select and Complete Application Forms Using MTE

## Selecting application forms

Having logged in to MTE, you will see a row of buttons at the top of the screen. By clicking on the **New Form** icon, this will allow you to select your required application form from the list available on MTE.

MTE - [Mortgage : Trading Exchange]									_ =	×	
File Viev	N	Tools Help									- 8 ×
Exit		New Form	Edit	Form Convert Form	View Form	Blank Form	X Delete Form	Send/Track Dis	sconnect	Inactive	Rel Hold
		Last Upda Cr	eate a r	new application form	Application	Form	Case ID	Application Status	Description	Transmission	n Status
3		01/07/2013 1	7:40	Mr Rich Man	Haven AIP (	HOMELOAN)		Incomplete	Form not validated	Not Sent	
3	►	01/07/2013 1		Mr Rich Man	Haven Full (			Incomplete	Form not validated	Not Sent	

You will see that the list is divided into **Agreements In Principle** and **Full Mortgages Applications**.

Simply select the form that you wish to complete from the relevant tab and click **OK**.

	lication Forms	×		
Select required application form below and click 'OK'				
Agreements In Principle Full Mortga	age Applications			
Application Form	Destination			
Haven AIP (HOMELOAN)	Haven Mortgages			
MTE Test AIP (IQ4)	MTE			
1				
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You will then see **Select Client** screen. This prompts you to select whether you are starting with a **New Client, Current Client** or **Import details from existing Form**. Select the option you need and click **OK**.

Applicant	
O New Client	
Mr Rich Man [Curre	nt Client)
C Import details from e	existing Form

MTE doesn't need to be connected to the internet for you to complete forms, this means that should your client not have all the information to hand when you are applying for their mortgage you can always store the application and finish it at a later date.



## **Completing a NEW Application Form**

Once your selected Application form has fully opened on the screen you should find that any client data that has previously been entered should be prepopulated into the necessary fields.

To finish completing the outstanding questions, you can either work your way through the questions by scrolling down through the application form until you get to the end.



Alternatively, you can use the **Validate** button at the top of the screen.

Having clicked on the validate button, this will provide you with an **Action List** of outstanding mandatory questions. Only once these have been completed can the form be validated and sent to the lender. You may save the form at any point by clicking on **Save Form**.

As you complete a question from the **Action List** the indicator will change to a green tick.

Click on the **Validate** button once more to check that the mandatory questions have been complete. If so you will see a confirmation box appear stating the form is valid. Click **OK** to return back to the form.



	Intelligent Questionnaire.Net	x
(į)	The Application Form is valid.	
	ОК	
Don't s	how this message again.	

You will now need to save and close the Application form in order to submit it to the lender. When back on the grid screen (list of applications) under Application status you will see that the form states **Ready to Send**.

The MTE software only relies on an internet connection when updating or when sending/tracking applications. With no internet available you can still open, edit, validate and save your applications forms.