NFI Online

Rate Switch Keying Guide



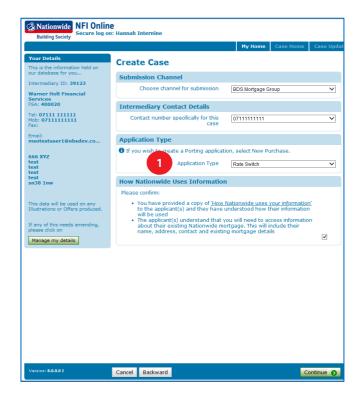
Building Society

For intermediary use only

This guide will assist you with keying a Rate Switch in NFI Online.

Note: The following application types can't be completed on NFI Online and should follow the paper exception process:

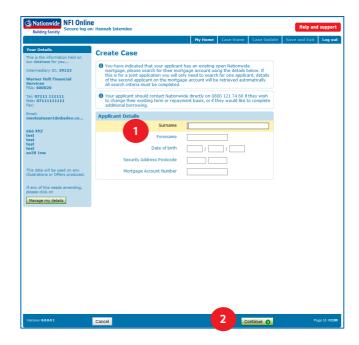
- Where there are more than two clients on the existing mortgage.
- Where your client is switching more than four accounts.
- Where your client is serving in the armed forces with a British Forces Post Office (BFPO) address and their property is currently let.



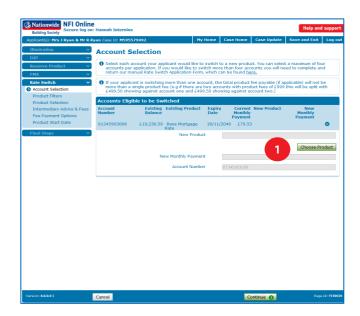
After logging in to NFI Online, click 'Create new case'.

After completing the first few questions, select 'Rate Switch' from the Application Type drop-down menu.

Click 'Continue' to proceed.



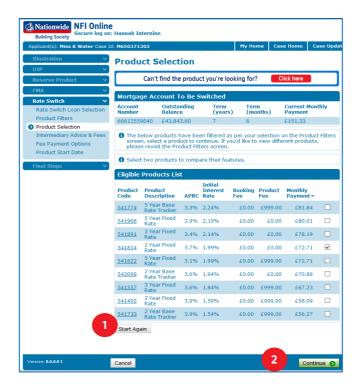
- On the 'Create Case' page, you'll be required to complete all the 'Applicant Details' fields. You should use the account numbers linked to the property being transacted on.
- **2** Click **'Continue'** to proceed.



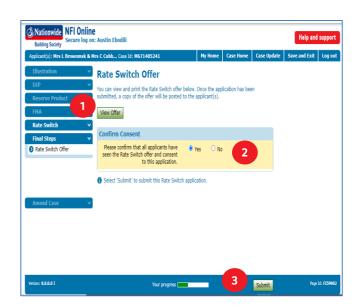
This screen will display all accounts eligible for a rate switch and will ask you to choose a product to switch to.

Click 'Choose Product' to switch the account to a new product.

Remember: You can switch up to 4 accounts per rate switch application online



- 1 If you would like to amend your chosen product filters, you can click 'Start Again' to return to the 'Account Selection' page which will clear any selection that has been made on the chosen account.
- 2 Alternatively, select a product from the list and continue to next page where you will select the Product Start Date.



- Once you've chosen your Product Start Date the 'Rate Switch Offer' page will prompt you to 'View Offer'. This will allow you to view and print the offer instantly.
- 2 You'll need to confirm that the applicants have seen the mortgage offer and consent to the rate switch.
- 3 Click 'Submit' to submit your application.

Remember: The product will only be reserved and the application fully submitted once you select 'Submit'.