

CAPITA MORTGAGE SERVICES

SBI Originations System – Broker Logon Guide

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Useful Information / Contacts

Logon details

If you have not received logon details then please contact your SBI Business Development Manager.

Lending Policy / Exceptions

If your query is about Lending Policy / Exceptions, please contact your SBI Business Development Manager.

Cases in progress

For queries that are in progress (including valuations) please contact SBI Mortgage Services on 0844 967 1860 (8:30am – 5:30pm Monday to Friday).

Product Queries

If your query is regarding new or existing products, please contact your SBI Business Development Manager.

Technical Issues

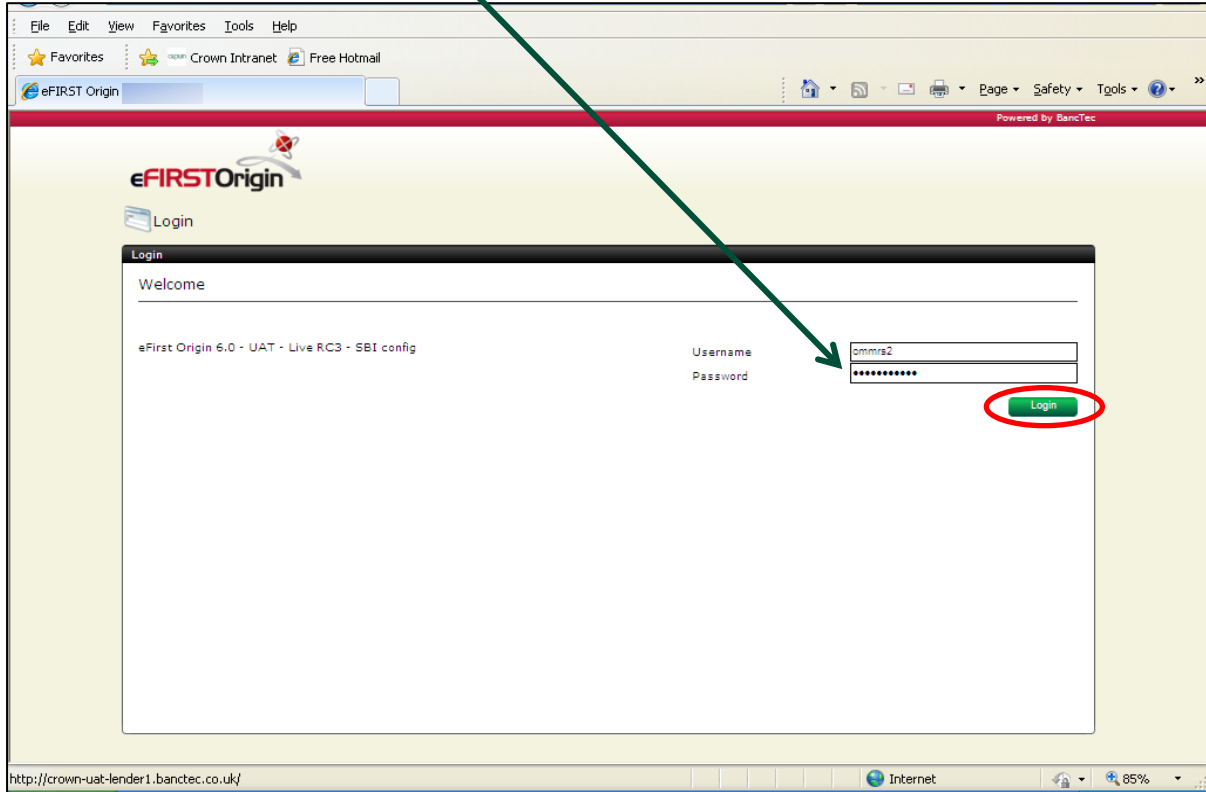
If you are having technical issues (i.e. if your account is locked or you've forgotten your password) please email Capita Mortgage Services Technical Support Team (Support@capitamortgageservices.co.uk) or call 01473 283 888 (8:30am – 5:30pm Monday to Friday).

Data Input

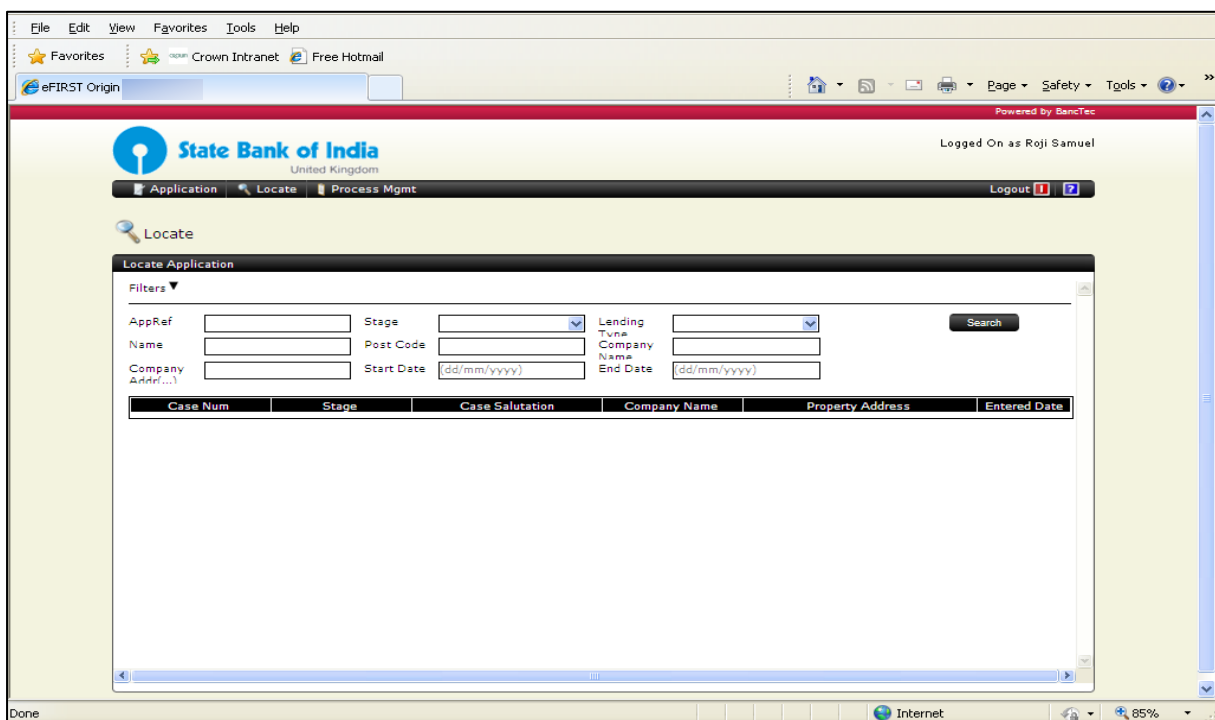
Please be aware that the data you see on the screen will be populated onto documents so it is important to make sure names, addresses etc. are capitalised correctly when input.

Getting Started

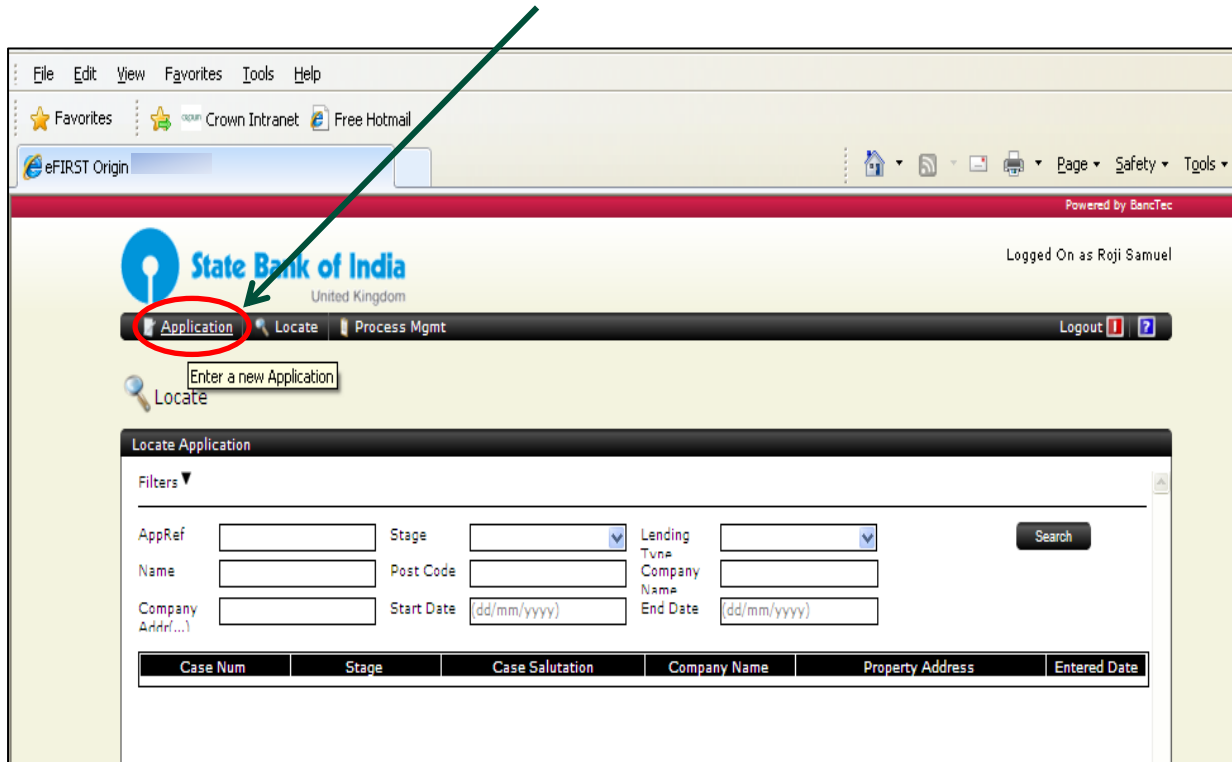
1. Logging into the system: URL: <https://sbi.mortgageportal.net>
Enter your username and password:



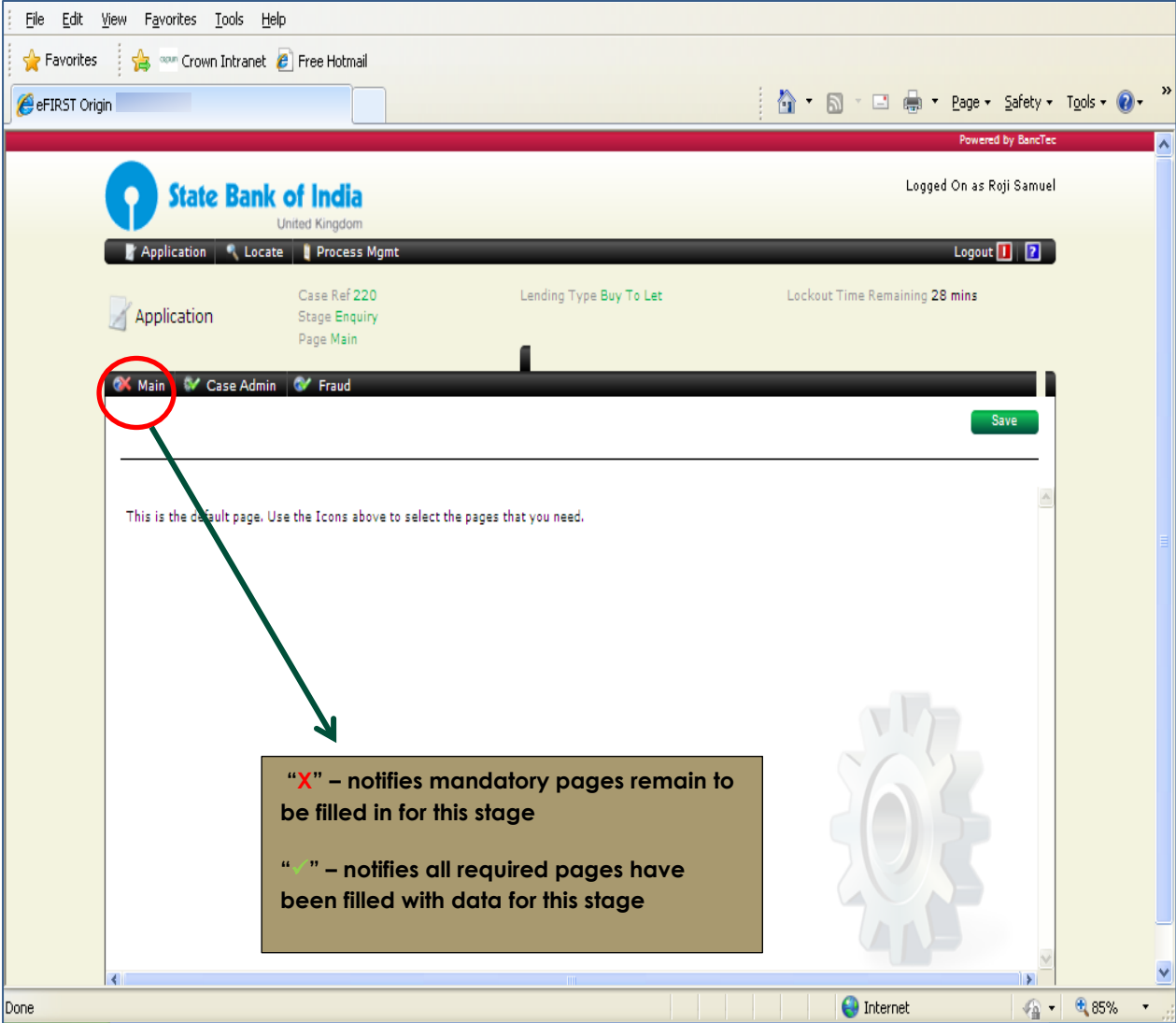
2. Home screen: The "locate application" page helps you to search applications using different filters and displays cases that you have initiated.



To start a new application: Click on 'Application'.



3. Main Application page:



File Edit View Favorites Tools Help

Favorites Crown Intranet Free Hotmail

eFIRST Origin

Powered by BancTec

State Bank of India
United Kingdom

Logged On as Roji Samuel

Application Locate Process Mgmt Logout

Application Case Ref 220 Lending Type Buy To Let Lockout Time Remaining 28 mins
Stage Enquiry
Page Main

Main Case Admin Fraud Save

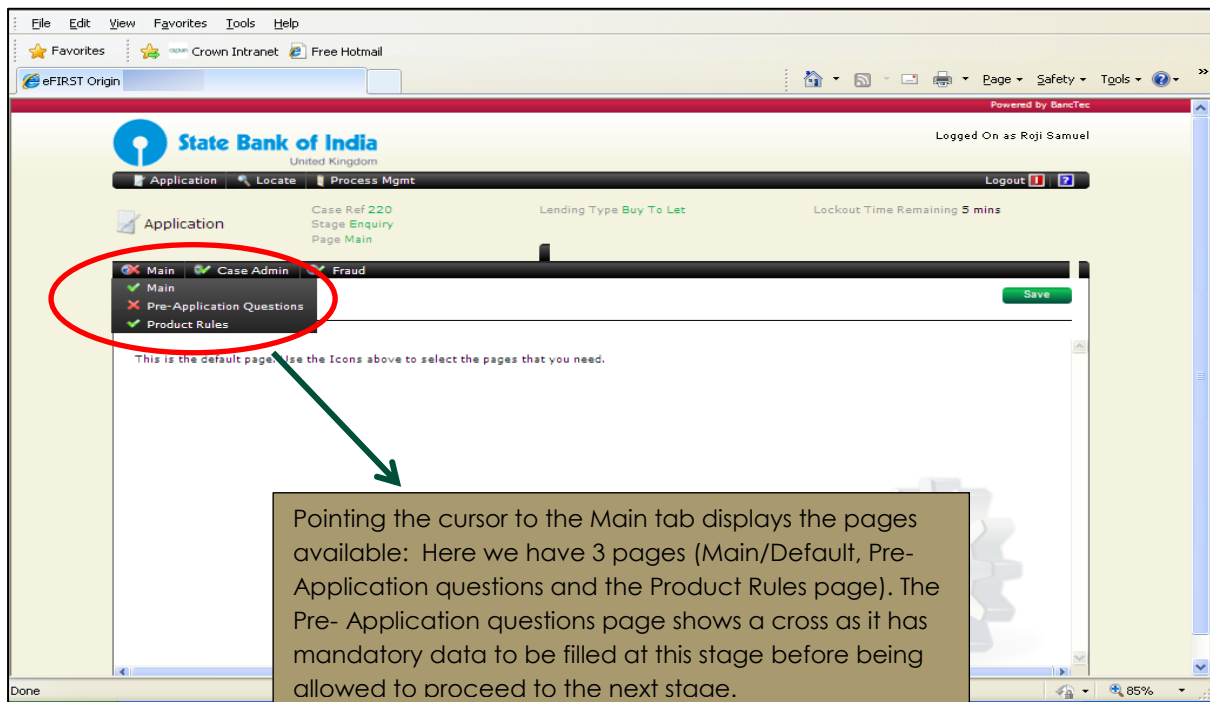
This is the default page. Use the icons above to select the pages that you need.

"X" – notifies mandatory pages remain to be filled in for this stage

"✓" – notifies all required pages have been filled with data for this stage


Done Internet 85%

4. Pointing to the page tabs shows the pages available at that stage:



Select Broker Details

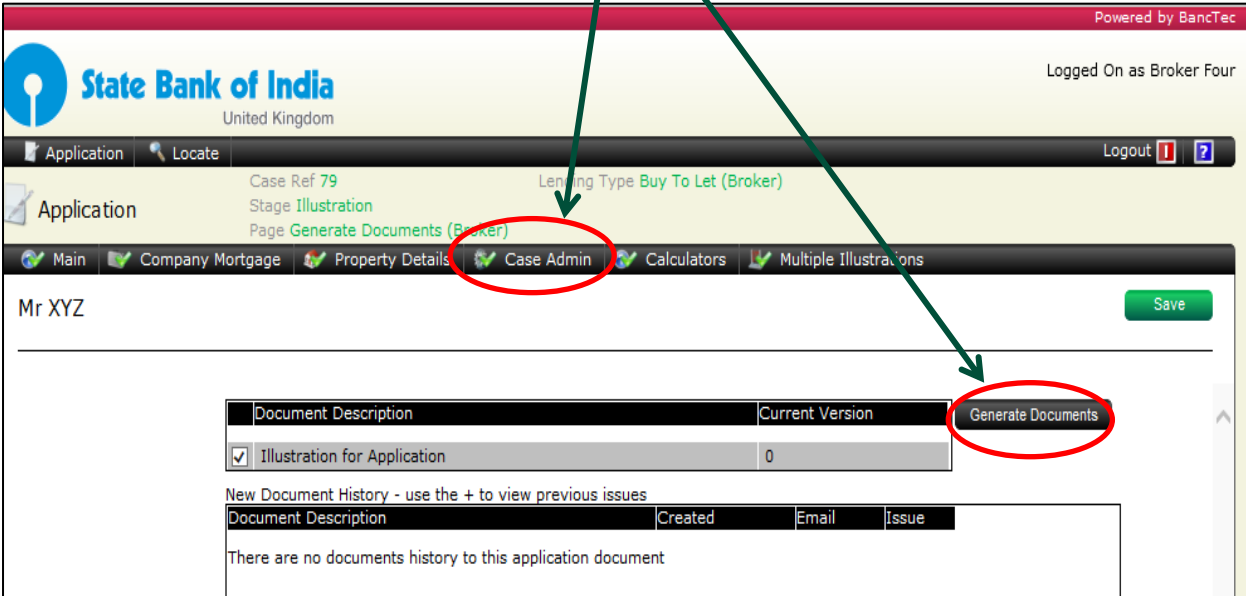
Before enquiry can start you need to search and confirm your broker details



The screenshot displays the CAPITA application interface for a broker. At the top left is the State Bank of India logo and 'United Kingdom'. The top right shows 'Logged On as Broker Four'. A navigation bar includes 'Application' and 'Locate' tabs, and a 'Logout' button. Below this, the current case information is shown: 'Case Ref 79', 'Lending Type Buy To Let (Broker)', 'Stage Enquiry', and 'Page Broker Details'. A secondary navigation bar has 'Main', 'Case Admin', and 'Calculators' options. A green 'Save' button is in the top right of the main content area. The main instruction reads: 'Please select your details on this screen before entering the Loan and Fee Details'. A section titled 'Broker Details' contains a 'Submission Route:' label, a search input field with the placeholder text 'Search to Select', and 'Search' and 'Clear' buttons.

Document Generation

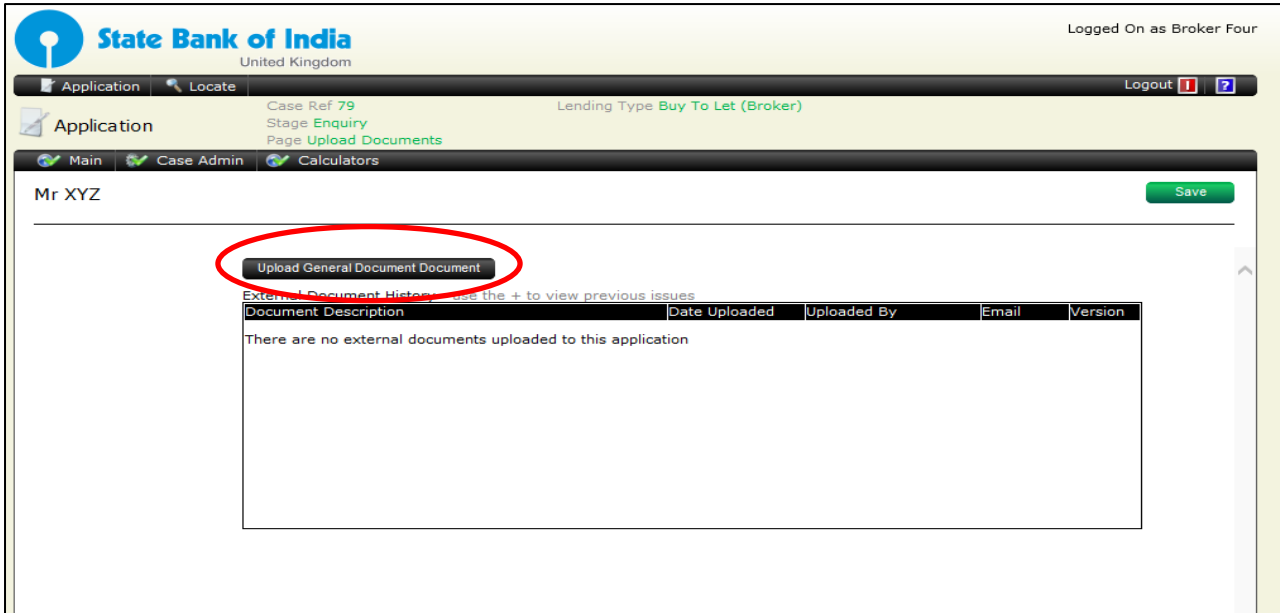
Documents are generated from the Case Admin menu and Generate Documents (Broker) screen. Select the document(s) to be generated and click Generate Documents, they will be returned as a pdf for local printing.



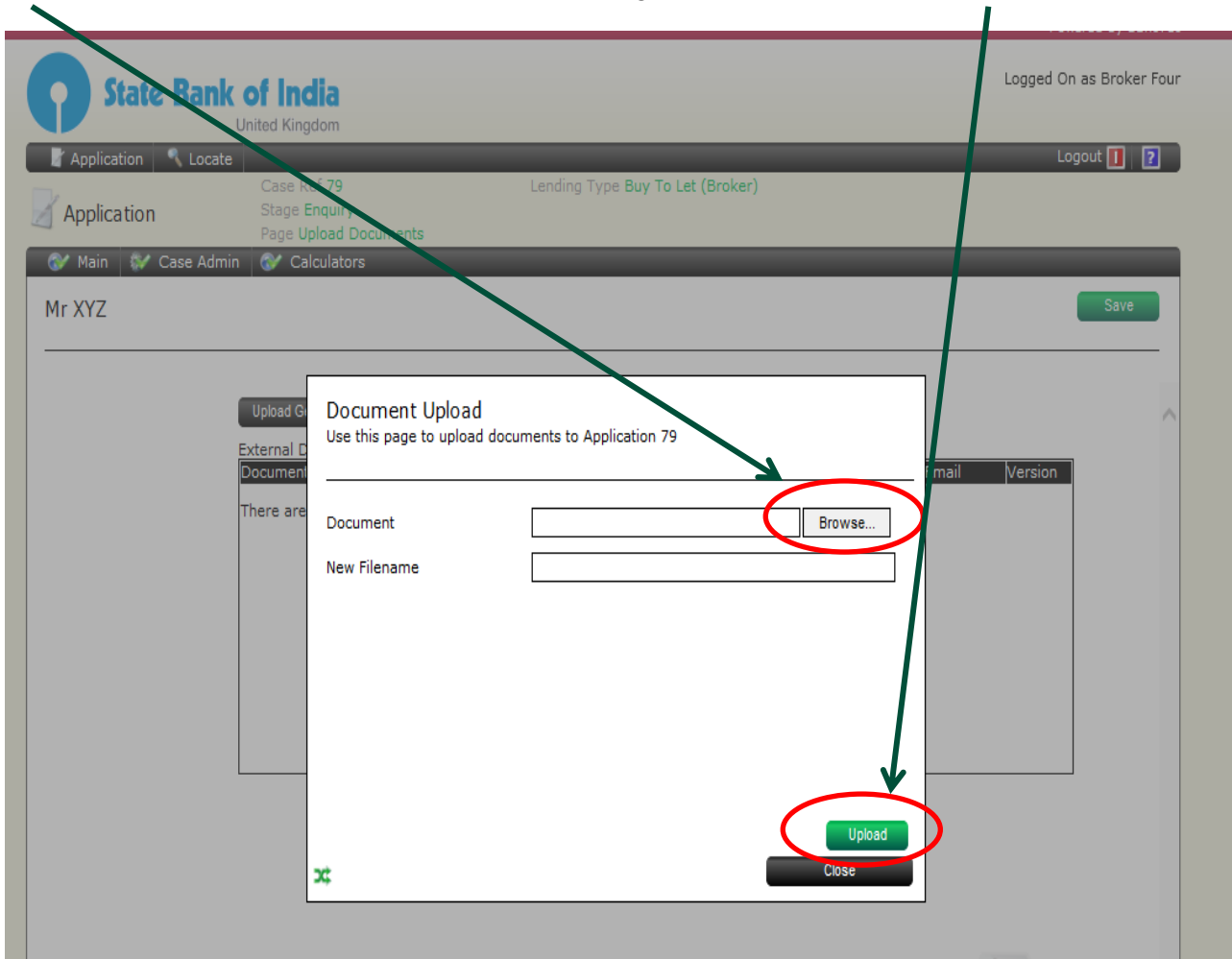
The screenshot shows the State Bank of India CAPITA system interface. The top navigation bar includes 'Application', 'Locate', and 'Logout'. The main content area displays 'Case Ref 79', 'Lending Type Buy To Let (Broker)', 'Stage Illustration', and 'Page Generate Documents (Broker)'. A navigation menu at the bottom includes 'Main', 'Company Mortgage', 'Property Details', 'Case Admin', 'Calculators', and 'Multiple Illustrations'. The 'Case Admin' menu item is circled in red. Below the navigation menu, the user name 'Mr XYZ' is displayed. A table with columns 'Document Description' and 'Current Version' is shown, with a row for 'Illustration for Application' having a value of '0'. A 'Generate Documents' button is circled in red. Below the table, there is a section for 'New Document History' with columns 'Document Description', 'Created', 'Email', and 'Issue'. The text 'There are no documents history to this application document' is displayed below the table.

Upload Documents


To upload documents use the “Upload documents” screen from the menu at any stage of the application



Browse and select document from PC/Laptop and give it a name and click “Upload”



After the document has been uploaded it can be accessed and viewed from the upload document screen by clicking the document name



State Bank of India
United Kingdom

Logged On as Broker Four

Application Locate Logout ?

Case Ref 79 Lending Type Buy To Let (Broker)

Application State Enquiry Page Upload Documents

Main Case Admin Calculators

Mr XYZ Save

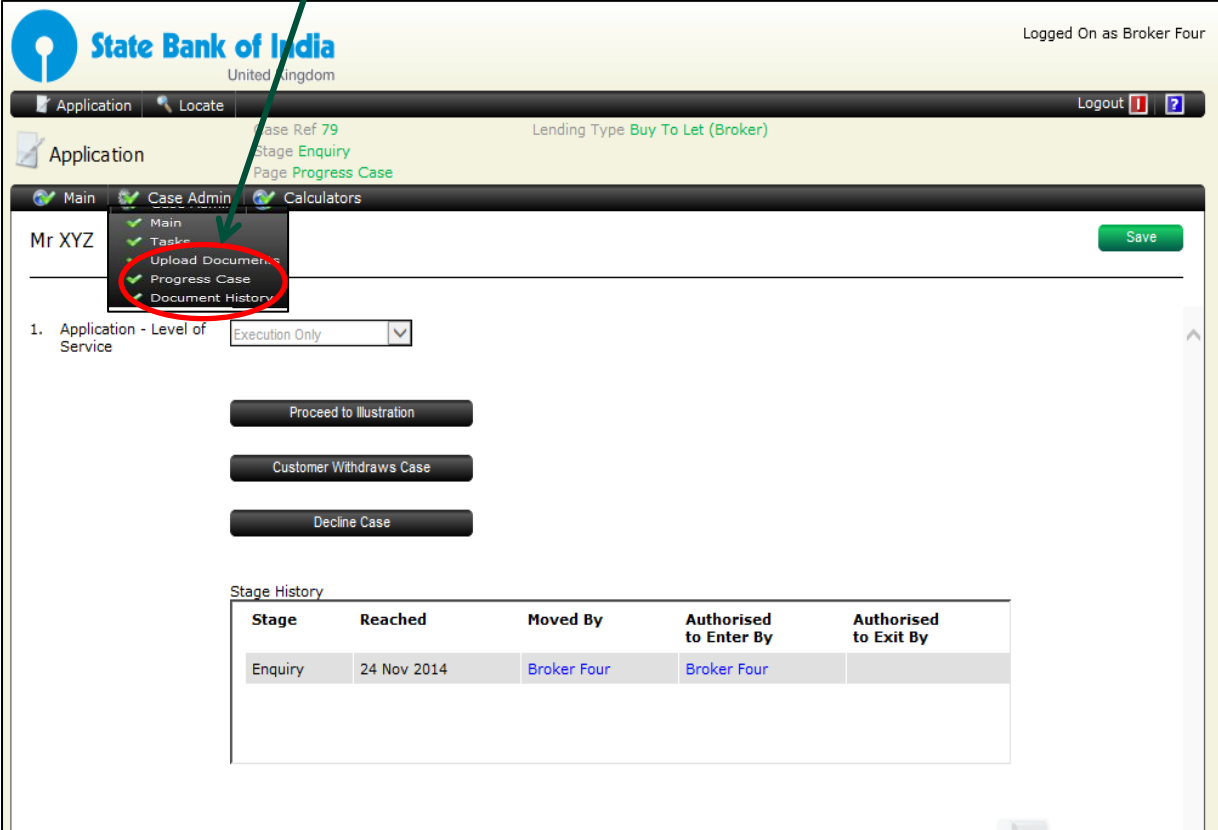
Upload General Document Document

External Document History - use the + to view previous issues

Document Description	Date Uploaded	Uploaded By	Email	Version
Broker Doc	24 November 2014	Broker Four		1

Progress Case

When all information has been collected for any given stage the case can be progressed using the Case Admin menu and the Progress case page

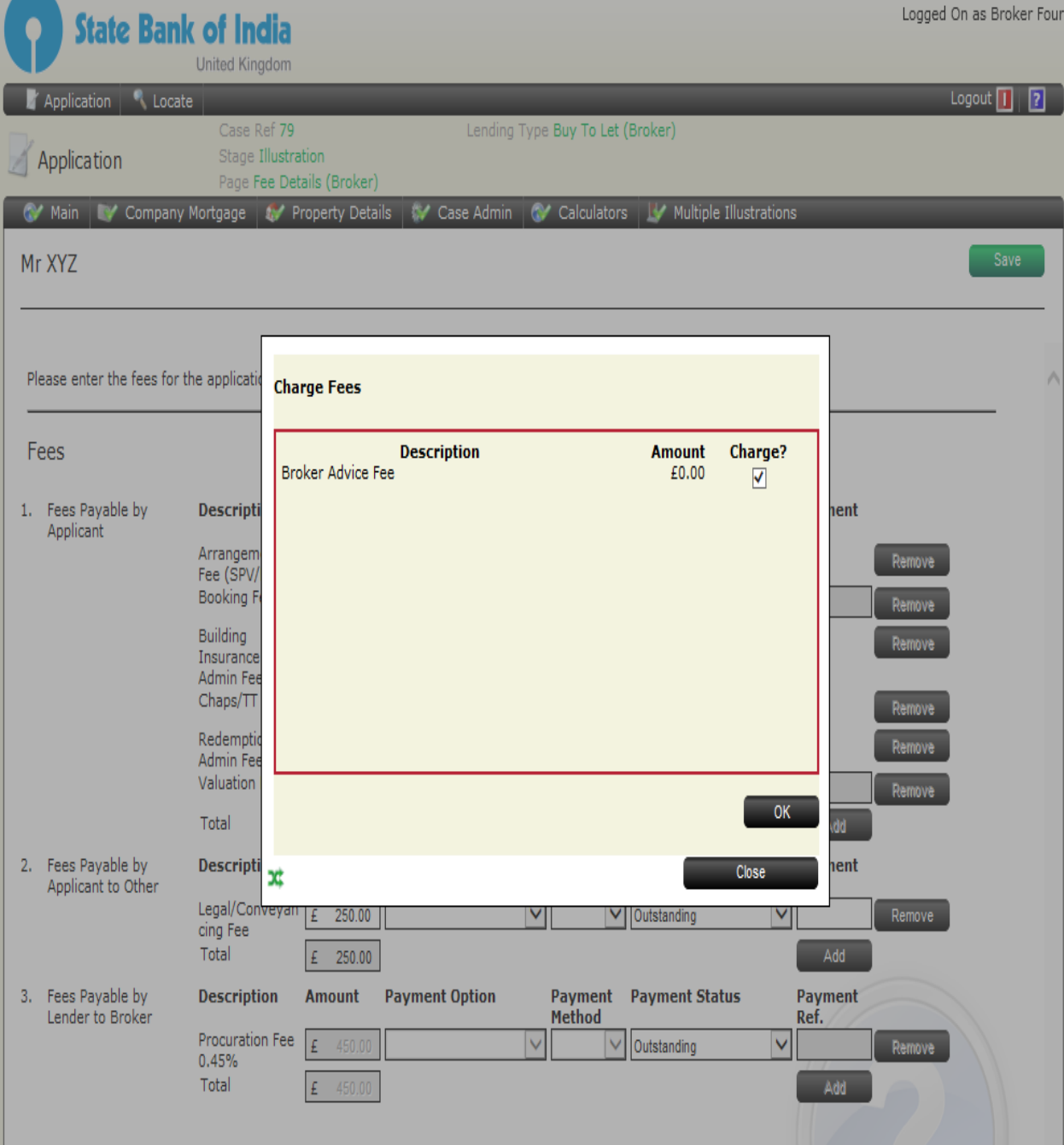


The screenshot displays the State Bank of India CAPITA system interface. At the top, the user is logged on as 'Broker Four'. The main navigation bar includes 'Application', 'Locate', and 'Logout'. The current case details are: Case Ref 79, Lending Type Buy To Let (Broker), Stage Enquiry, and Page Progress Case. The 'Case Admin' menu is open, with the 'Progress Case' option highlighted in red. Below the menu, the user's name 'Mr XYZ' is displayed. The main content area shows a dropdown menu for 'Application - Level of Service' set to 'Execution Only'. There are three buttons: 'Proceed to Illustration', 'Customer Withdraws Case', and 'Decline Case'. A 'Save' button is also visible. At the bottom, a 'Stage History' table is shown.

Stage	Reached	Moved By	Authorised to Enter By	Authorised to Exit By
Enquiry	24 Nov 2014	Broker Four	Broker Four	

Adding Broker Fee

To add a broker fee click Add in the Fee Payable by Applicant to Other section via the Fees Detail page




The screenshot shows the 'Fees' section of the CAPITA system. A 'Charge Fees' dialog box is open, displaying a table with the following data:

Description	Amount	Charge?
Broker Advice Fee	£0.00	<input checked="" type="checkbox"/>

The dialog box has 'OK' and 'Close' buttons. In the background, the 'Fees' table is partially visible, showing three sections:



- 1. Fees Payable by Applicant:** Includes items like Arrangement Fee (SPV/Booking Fee), Building Insurance Admin Fee, Chaps/TT, Redemption Admin Fee, and Valuation Fee. A 'Total' row shows £ 250.00.
- 2. Fees Payable by Applicant to Other:** Includes Legal/Conveyancing Fee. A 'Total' row shows £ 250.00.
- 3. Fees Payable by Lender to Broker:** Includes Procurement Fee (0.45%). A 'Total' row shows £ 450.00.

Then overwrite the fee amount under the Broker Advice Fee



State Bank of India
United Kingdom

Logged On as Broker Four

Application Locate Logout  

Case Ref 79 Lending Type Buy To Let (Broker)

Stage Illustration

Page Fee Details (Broker)

Main Company Mortgage Property Details Case Admin Calculators Multiple Illustrations

Mr XYZ Save

Please enter the fees for the application

Fees

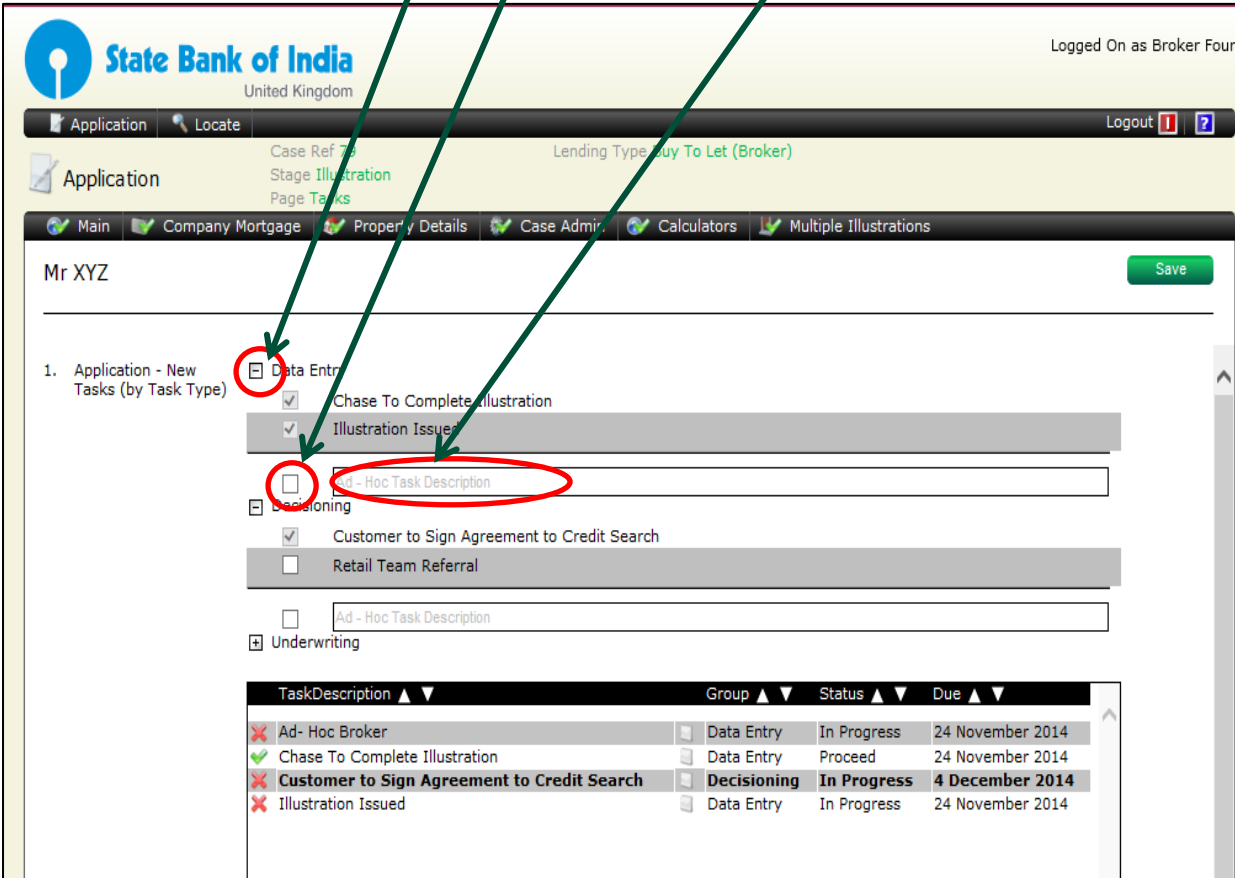
1. Fees Payable by Applicant	Description	Amount	Payment Option	Payment Method	Payment Status	Payment Ref.	
	Arrangement Fee (SPV/LLP)	£ 1,000.00	Capitise				Remove
	Booking Fee	£ 199.00	Upfront		Outstanding		Remove
	Building Insurance Admin Fee	£ 30.00	Deduct				Remove
	Chaps/TT Fee	£ 35.00	Deduct				Remove
	Redemption Admin Fee	£ 150.00	On Redemption				Remove
	Valuation Fee	£ 225.00	Upfront		Outstanding		Remove
	Total	£ 1,639.00					Add
<hr/>							
2. Fees Payable by Applicant to Other	Description	Amount	Payment Option	Payment Method	Payment Status	Payment Ref.	
	Broker Advice Fee	£ 0.00	Upfront		Outstanding		Remove
	Legal/Conveyancing Fee	£ 250.00			Outstanding		Remove
	Total	£ 250.00					Add
<hr/>							
3. Fees Payable by Lender to Broker	Description	Amount	Payment Option	Payment Method	Payment Status	Payment Ref.	
	Procuracion Fee 0.45%	£ 450.00			Outstanding		Remove
	Total	£ 450.00					Add

Case Tasks

Tasks can be seen and completed from the Case Admin menu and Tasks screen

Tasks in the Illustration stage:

1. **Mandatory tasks:** These are always displayed and need to be completed to Proceed to the next stage – these are automatically generated as you progress through the case
2. **Optional task:** These are optional but if selected, the user must complete the task to proceed to the next stage – you select these on the screen below, you can see what optional tasks are available at each stage by clicking the + box
3. **Ad-Hoc tasks:** tasks created by the user, these do not need to be completed to proceed to the next stage – these are added by ticking here and adding a name



State Bank of India United Kingdom

Logged On as Broker Four

Application Locate Logout

Case Ref 799 Lending Type Buy To Let (Broker)

Application Stage Illustration Page Tasks

Main Company Mortgage Property Details Case Admin Calculators Multiple Illustrations

Mr XYZ Save

1. Application - New Tasks (by Task Type)

- Data Entry
- Chase To Complete Illustration
- Illustration Issued
- Ad - Hoc Task Description
- Decisioning
 - Customer to Sign Agreement to Credit Search
 - Retail Team Referral
- Ad - Hoc Task Description
- Underwriting

TaskDescription	Group	Status	Due
Ad- Hoc Broker	Data Entry	In Progress	24 November 2014
Chase To Complete Illustration	Data Entry	Proceed	24 November 2014
Customer to Sign Agreement to Credit Search	Decisioning	In Progress	4 December 2014
Illustration Issued	Data Entry	In Progress	24 November 2014