MCMS001.LG v7.0

MortgageStream: Letter Generation

M Baker 3rd July 2009

Proprietary Information

The information contained within this document is the property of MortgageStream Limited. Except as specifically authorized in writing by MortgageStream the holder shall keep all information contained herein confidential and shall protect same in whole or in part from disclosure and dissemination to all third parties to the same degree it protects its own information.

© Copyright MortgageStream Limited 2009.

Page 1 of 16 MCMS001.LG v7.0



Distribution List

MortgageStream	Clients
MortgageStream Support Staff	On request

Version History

Version	Date	Comments
0.1	6 Mar 2005	First version
0.2	7 Feb 2006	Added Most Fields Letter; FAX All Template; Application Process Fields Letter
1.0	12 Oct 2006	Added Admin field to many templates
1.0.1	9 Jan 2007	Corrected layout problem in Application Process Fields letter
1.1	8 Mar 2007	Informal Salutation added to various client letters
1.2	15 Aug 2007	V4.2: New Template 'Valuer Letter' and Valuer fields added to Fax All Template
1.3	6 Sep 2007	V4.2: New Template 'Policy Letter' added
7.0	3 Jul 2009	V7.0: 'Policy Letter' fields added

References

Page 2 of 16 MCMS001.LG v7.0



Table of Contents

1	INT	RODUCTION	. 4
	1.1	INTENDED AUDIENCE	. 4
2	LET	TTER GENERATION FUNCTIONS	. 5
	2.1	VIEWING LETTERS	. 5
	2.2	GENERATING LETTERS	. 6
	2.3	MODIFYING YOUR LETTER TEMPLATES	. 7
	2.3.	Rules and guidance with creating your templates	. 7
	2.3.	2 Creating (deriving) your own template	. 8
3	API	PENDIX A - TEMPLATE FIELDS AND AVAILABILITY	9

List of Figures



1 Introduction

This document provides details of the Letter Generation functionality within MortgageStream.

Letter Generation allows users to create standard letters for their clients, lenders, solicitors etc., and to derive their own templates from those provided in the standard system.

1.1 Intended Audience

The intended audience for this document is anyone who is tasked with defining a company's own customised letter templates from those provided by default in MortgageStream, in order to modify them to suit more specifically their business needs.

Page 4 of 16 MCMS001.LG v7.0



2 Letter Generation functions

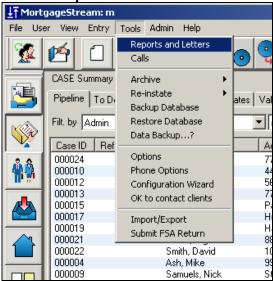
2.1 Viewing letters

To view the letters (and reports) which exist for a particular entity (client, lender etc.), either:

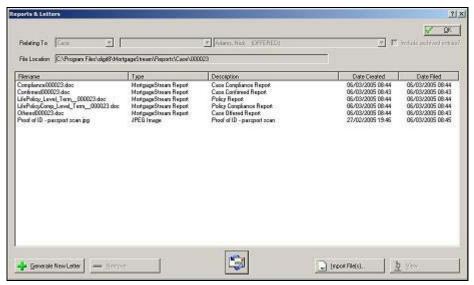
Click the Rpts/Letters button on the entity's details dialog, or



Use the Reports and Letters command from the Tools menu.



In either case, the Reports & Letters screen will be displayed – this lists all the reports (generated by MortgageStream on lead/case progression), letters (created by the user) and any other imported files (e.g. proof of ID, scanned documents etc.):



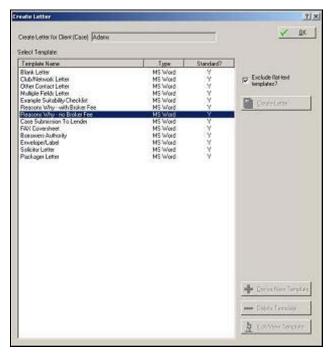
Page 5 of 16 MCMS001.LG v7.0



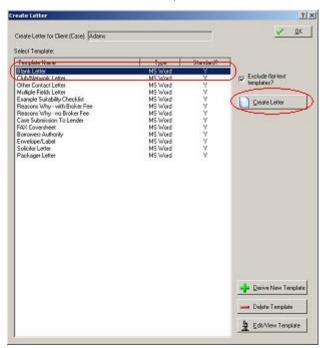
2.2 Generating letters

To create a letter:

click on the Generate Letter button. The Create Letter screen will be displayed:



Select the letter of choice, then click the Create Letter button:



Page 6 of 16 MCMS001.LG v7.0



 Click View to open the letter for viewing or further editing, or click OK to accept the letter (which is filed under the specified lead/case/lender etc.):



2.3 Modifying your letter templates

You can define your own letter templates, by deriving them from those supplied with MortgageStream, then customising them to suit your business. This may include, for example, your own headers and footers, modified text and modified layout using fonts, colours etc.

2.3.1 Rules and guidance with creating your templates

When creating customised templates, the following should be borne in mind:

1) The derived template *inherits* the same **information fields** ("merge fields") as the template from which it is derived. These appear as text between the following markers:

Template Format	Merge filed markers	Example
Microsoft Word	« »	«Name»
Flat Text	>	Name>

[See Appendix A for a list of templates fields]

- 2) The derived template *inherits* the same **availability** as the template from which it is derived. e.g. a template derived from the 'Reasons Why' standard template will only be available for chosen *cases* (not lenders, advisers etc.).
 - a. Some templates are available for leads only;
 - b. Some templates are available for cases only;
 - c. Some templates are available for lead and cases:
 - d. Other templates apply to advisers or lenders only, for example.

[See Appendix A for a list of template availability]

- 3) You may delete any of the information fields in the template, but cannot add new ones.
- 4) Any formatting you include in a Word-format template will be included in the generated letters. This includes colour, fonts, **bold**, pictures etc. You can use this feature to embed company logos and contact information in your template headers and footers, for example.
- 5) Some of the templates (for example the 'Reasons Why' Letter) are multi-purpose, and should be individually tailored to suit the corresponding case. Text that needs adding is usually specified as xxxxxx in the template. Blocks of text that need amending or deleting are specified in double curly braces, e.g. {{amend text here}}.

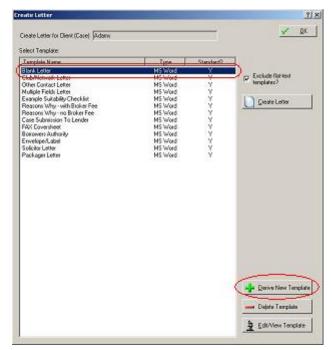
Page 7 of 16 MCMS001.LG v7.0



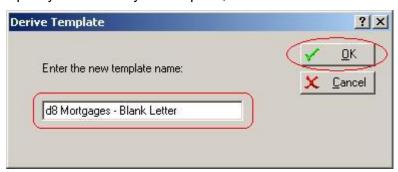
2.3.2 Creating (deriving) your own template

To create a template, from the Create Letter screen:

Select the letter of choice, then click the Derive New Template button:



• Specify a name for your template, then click the **OK** button:



The template will be opened in Microsoft Word (or Notepad/Wordpad if it is a flat-text file).

- Edit the template according to the rules specified in Section 2.3.1.
- Close and save the template file.
- The derived template is now available to create letters.

Page 8 of 16 MCMS001.LG v7.0



3 Appendix A – Template fields and availability

The following table lists the various standard templates available in MortgageStream, their merge fields, and the availability of each template:

	E	
Template [and availability]	Field name	Field description
BlankLetter [Any ¹]	Date NameAddr Salutation SalInformal Adviser AdviserForename AdviserSurname OurRef IR AT	Today's date Name & Address of receipient Dear (formal) Dear (informal) Adviser Preferred name ² Adviser's forename ² Adviser's surname ² Lead/Case ID ² Reference ² Adviser's telephone ²
Reasons Why - with Broker Fee [Case]	AM Admin Date Name NameAddr Salutation SalInformal OurRef IR Lender Packager_Club Curr Loan Term Product ProcFee BrokerFee Company CurPrem Adviser AdviserForename AdviserSurname AT AM Admin	Adviser's Mobile ² Lead/Case administrator ² Today's date Full name of 1 st applicant Name(s) of applicant(s) and multi-line address Dear (formal) Dear (informal) Lead/Case ID ² Reference ² Lender name Club/Network Name (if applicable) Current property value Loan required Term (years) and type (e.g. interest-only) Product interest Rate/basis (e.g. 4.00% fixed) Total procuration fee Total broker (client) fee Company Name Current Monthly Premium Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Case administrator
Reasons Why - no Broker Fee [Case]	Date Name NameAddr Salutation SalInformal OurRef IR Lender Packager_Club Curr Loan Term Product ProcFee CurPrem Adviser	Today's date Full name of 1st applicant Name(s) of applicant(s) and multi-line address Dear (formal) Dear (informal) Lead/Case ID² Reference² Lender name Club/Network Name (if applicable) Current property value Loan required Term (years) and type (e.g. interest-only) Product interest Rate/basis (e.g. 4.00% fixed) Total procuration fee Current Monthly Premium Adviser Preferred name

¹ Lead, Case, Adviser, Lead Source, Lender, Solicitor, Packager, Club/Network, Other Contact

Page 9 of 16 MCMS001.LG v7.0

² For letter generated in Lead/Case only



	AdviserForename	Adviser's forename
	AdviserSurname	Adviser's surname
	AT	Adviser's telephone
	AM	Adviser's Mobile
	Admin	Case administrator
	Data	madesat and deba
	Date Recipient	Today's date Name of receipient (Lender)
	Address	Address of receipient (Lender)
	OurRef	Lead/Case ID ²
	IR	Reference ²
	YourRef	Lender's Reference
Case Submission To	Client	Product Name
Lender	Product	Product Details
	Rate	Product Rate
[Case]	Amt	Amount of Loan
	Term	Term (years) and type (e.g. interest-only)
	Solicitors	Solicitor Details
	Adviser AdviserForename	Adviser Preferred name Adviser's forename
	AdviserForename	Adviser's surname
	Admin	Case administrator
	Date	Today's date
	NameAddr	Name & Address of receipient
	Salutation	Dear (formal)
Client Renewal	SalInformal	Dear (informal)
Cilent Renewal	RedDate	Renewal Date (end of redemption)
I a	Adviser	Adviser Preferred name
[Case -	AdviserForename	Adviser's forename
only AWAITING RENEWAL]	AdviserSurname	Adviser's surname
	AT	Adviser's telephone
	AM	Adviser's Mobile
	Admin	Case administrator
FAX Coversheet	Date	Today's date
TAX COVELBHEEC	Recipient Fax	Name & Address of receipient Fax Number
[200-1]	Tel	Main Telephone Number
[Any¹]	Admin	Lead/Case administrator ²
	110211	20day odbo ddiii 11201 doo'i
	Date	Today's date
	Recipient	Name & Address of receipient
	Fax	Fax Number
	Tel	Main Telephone Number
	LSRecip	Lead Source recipient name & company name
	LSFax	Lead Source FAX number
	LSTel	Lead Source Telephone Number
	AdvRecip	Adviser recipient name & company name
	AdvFax	Adviser FAX number
	AdvTel LenRecip	Adviser Telephone Number
	Lenkecip	Lender recipient name & company name Lender FAX number
FAX ALL Coversheet	LenTel	Lender Telephone Number
	PkRecip	Packager recipient name & company name
[Case / Lead]	PkFax	Packager FAX number
	PkTel	Packager Telephone Number
	CNRecip	Club/Network recipient name & company name
	CNFax	Club/Network FAX number
	CNTel	Club/Network Telephone Number
	SolRecip	Solicitor recipient name & company name
	SolFax	Solicitor FAX number
	SolTel OCRecip	Solicitor Telephone Number Other Contact recipient name & company name
	OCRECIP	Other Contact recipient name & company name Other Contact FAX number
	OCTel	Other Contact Telephone Number
	Valecip	Valuer recipient name & company name
	ValFax	Valuer FAX number
		ı

Page 10 of 16 MCMS001.LG v7.0



	ValTel Admin	Valuer Telephone Number Lead/Case administrator
Borrowers Authority	Address Lender Solicitor Company BrokerFee	Address of Client (on one line) Lender Name Solicitor Name Company Name (Broker company) Broker (client) fee
Envelope/Label [Any ¹]	NameAddr	Name & Address of receipient
Solicitor Letter	Date Recipient Address OurRef IR Client Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name of receipient (Solicitor) Address of receipient (Solicitor) Lead/Case ID ² Reference ² Client Name & Address on one line Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Case administrator
Packager Letter [Case]	Date Recipient Address OurRef IR Client Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name of receipient (Packager) Address of receipient (Packager) Lead/Case ID² Reference² Client Name & Address on one line Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Case administrator
Club/Network Letter	Date Recipient Address OurRef IR Client Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name of receipient (Club/Network) Address of receipient (Club/Network) Lead/Case ID ² Reference ² Client Name & Address on one line Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Case administrator
Other Contact Letter	Date Recipient Address OurRef IR Client Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name of receipient (Other Contact) Address of receipient (Other Contact) Lead/Case ID² Reference² Client Name & Address on one line Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Case administrator
Valuer Letter	Date Recipient Address	Today's date Name of receipient (Valuer) Address of receipient (Valuer)

Page 11 of 16 MCMS001.LG v7.0



	OD a f	Lord/Goro ID ²
[Case]	OurRef	Lead/Case ID ²
[case]	IR	Reference ²
	Client	Client Name & Address on one line
	Adviser	Adviser Preferred name
	AdviserForename	Adviser's forename
	AdviserSurname	Adviser's surname
	AT	Adviser's telephone
	AM	Adviser's Mobile
	Admin	Case administrator
	Date	Today's date
	Recipient	Name of receipient (Provider)
	-	1
	Address	Address of receipient (Provider)
	OurRef	Lead/Case ID ²
	IR	Reference ²
	Client	Client Name & Address on one line
	n1	Title of 1 st applicant
	f1	1 st applicant's forename
	s1	1 st applicant's surname
	App1	Title, forename, surname, DOB of 1st applicant
	Addr	Corresp. Address (on one line)
	Addrm	Corresp. Address (on multiple lines)
	n2	Title of 2 nd applicant
	f2	2 nd applicant's forename
	s2	2 nd applicant's surname
	App2	Title, forename, surname, DOB of 2 nd applicant
	Addr2	Address of 2 nd applicant (on one line)
		Address of 2 applicant (on one line)
	Addr2m	Address of 2 nd applicant (on multiple lines)
	FA	Future / Mortgaged address (on one line)
	FAm	Futre / Mortgaged address (on multiple lines)
	type	policy type (Life, ASU etc.)
Policy Letter	subtype	policy subtype (Level Term, Dec Term etc.)
-	cover	cover type (life only)
	state	policy state
[Case]	sum	sum insured/assured
	term	term of cover (life) /deferred period (ASU)
	ben	benefit period (ASU only)
	waiv	waiver of premium (life only)
	apptype	applicant type (single, joint, split)
	app	applicant (1 or 2)
	provider	provider
	prem	premium
	quaranteed	premium guaranteed / reviewable?
	trust	policy in trust? (life / misc only)
	polno	
	-	policy number date written
	written	
	onrisk	date on risk
	lapsed	date lapsed
	npw	date not proceeded with (NPW)
	polnotes	policy notes
	Adviser	Adviser Preferred name
	AdviserForename	Adviser's forename
	AdviserSurname	Adviser's surname
	AT	Adviser's telephone
	AM	Adviser's Mobile
	Admin	Case administrator

Page 12 of 16 MCMS001.LG v7.0



	T	T
	Date	Today's date
	NameAddr	Name(s) of applicant(s) and multi-line address
	Salutation	Dear
	ID	Case ID ²
	IR	Reference ²
	n1	Title of 1 st applicant
	f1	1st applicant's forename
	s1	1 applicant's forename
	**	Title, forename, surname, DOB of 1st applicant
	App1 n2	Title of 2 nd applicant
	f2	2 nd applicant's forename
	s2	2 applicant's forename 2 nd applicant's surname
	~-	2 applicant's surname
	App2	Title, forename, surname, DOB of 2 nd applicant
	Addr2	Address of 2 nd applicant (on one line)
	FutAddr	Future / Mortgaged address (on one line)
	Len	Lender name
	LenAddr	Lender address (on one line)
	LenRef	Lender's reference
	T	Mortgage Type
	T2	Secondary Type
	Curr	Purchase price / current value
	Amt	Loan amount
Multiple Fields Letter	Product	Product name
Multiple Fields Letter	Rate	Product Rate details
	Term	Term (years) and type (e.g. interest-only)
[Case]	Solicitors	Solicitor name
	SolAddr	Solicitor address (on one line)
	OC	Other Contact name
	OCA	Other Contact address (on one line)
	ExM	Existing Mortgage details ³
	ExL	Existing Mortgage lender
	ExA	Existing Mortgage amount
	ExLA	Existing Mortgage lender address (on one line)
	SCL	2 nd charge lender
	SCA	2 nd charge amount
	SCLA	2 nd charge lender address
	Fin	Financial details
	Ad	Adverse Credit details
	Proc	Procuration fee
	Bro	Broker (client) fee
	LP	1 st Life policy details
	AP	1 st ASU policy details
	BP	1 st B&C policy details
	Adviser	Adviser Preferred name
	AdviserForename	Adviser's forename
	AdviserSurname	Adviser's surname
	AT	Adviser's telephone
	AM	Adviser's Mobile
	Admin	Case administrator
	1	

Page 13 of 16 MCMS001.LG v7.0

³ Current Value, Existing Mortgage, Existing Premium, Existing Interest Rate, Existing Lender, Debt Consolidation, 2nd Charge, 2nd Charge Lender



D NA Name(s) of applicant(s) and multi-line add S Dear ID Case ID² IR Reference² nl Title of lat applicant fl 1	
NA Name(s) of applicant(s) and multi-line add S Dear ID Case ID² IR Reference² n1 Title of 1st applicant f1 applicant's forename f1 applicant's surname Appl Title, forename, surname, DOB of 1st applicant Addr Corresp. Address (on multiple lines) n2 Title of 2sd applicant's forename f2 applicant's forename appl Address (on multiple lines) n2 Title of 2sd applicant f2 applicant's forename s2 applicant's forename s2 applicant's forename f2 applicant's forename f2 applicant's forename s2 applicant's forename f2 applicant (so unautiple lines) Address of 2sd applicant (on one line) Address of 2sd applicant (on one line) Address of 2sd applicant (on one line) Address of 2sd applicant (on multiple lines) FA Future / Mortgaged address (on one line) Lender name Lender name Lender address (on one line) Lender address (on multiple lines) Lender address (on multiple lines) Lender address (on multiple lines) Lender address price / current value Amt Loan amount Pr Secondary Type Cu Purchase price / current value Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sola Solicitor address (on one line) [Case] Most Fields Letter Sol Solicitor address (on multiple lines) OC Other Contact name Other Contact dadress (on one line)	
S ID Case ID ² IR Reference ² In1 Title of 1 st applicant ff1 1st applicant's forename sl appl Addr Addr Corresp. Address (on one line) Addra Corresp. Address (on multiple lines) In2 Title of 2 nd applicant's surname Appl Addra Corresp. Address (on multiple lines) In2 Title of 2 nd applicant In1	
ID	ıt
IR n1 1 title of 1st applicant f1 1 st applicant's forename s1 Appl Title, forename, surname, DOB of 1st applican Addr Corresp. Address (on one line) Addrm Corresp. Address (on multiple lines) n2 Title of 2st applicant f2 applicant's forename s2 2st 2st 2st applicant's forename App2 Address of 2st applicant Address of 2st applicant Address of 2st applicant (on one line) Address of 2st applicant (on one line) Address of 2st applicant (on multiple lines) Address of 2st applicant (on multiple lines) Address of 2st applicant (on multiple lines) FA Future / Mortgaged address (on one line) FA Future / Mortgaged address (on multiple lines) LenA LenAm Lender address (on one line) LenAm Lender address (on multiple lines) LenR Lender address (on multiple lines) Scota Solicator name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Solicator address (on one line) SolA Solicitor address (on multiple lines) OC Other Contact name OCA Other Contact address (on one line)	ıt
n1 fl display applicant for applicant fl distapplicant's forename sl appl daddr daddr Corresp. Address (on one line) Addr Corresp. Address (on multiple lines) n2 Title of 2 nd applicant fl applicant's forename n2 Title of 2 nd applicant fl applicant fl applicant for applicant fl applicant	ıt
f1 s1 lat applicant's forename Appl Appl Addr Addr Addr Addrm Corresp. Address (on one line) Corresp. Address (on multiple lines) Inc Itile, forename, surname, DOB of 1st applicant Addre Sc App2 App2 App2 Address Address (on multiple lines) Itile of 2nd applicant Address (on multiple lines) Itile of 2nd applicant Itile of 2nd applicant Itile of 2nd applicant Itile, forename Address of 2nd applicant (on one line) Address of 2nd applicant (on one line) Address of 2nd applicant (on multiple lines) Address of 2nd applicant (on multiple lines) Address of 2nd applicant (on multiple lines) Itile, forename, surname, DOB of 2nd applicat Address of 2nd applicant (on one line) Address of 2nd applicant (on one line) FA Future / Mortgaged address (on one line) Itile, forename, surname, DOB of 2nd applicant Address of 2nd applicant Itile, forename, surname, DOB of 2nd applicant Address of 2nd applicant Itile, forename, surname, DOB of 2nd applicant Address of 2nd applicant Itile, forename, surname, DOB of 2nd applicant Itile of 2nd	ıt
s1 App1 App1 Addr Addr Addr Addr Addr Addrm DCorresp. Address (on one line) Address DCorresp. Address (on multiple lines) DCorresp. Address (on one line) DCorresp. Address (one delication one line) DCorresponder of the deadles (one delication one line) DCorresponder of	ıt
App1 Addr Addr Addrm Addrm Corresp. Address (on one line) Corresp. Address (on multiple lines) Title of 2 nd applicant f2 f2 f2 dapplicant's forename App2 Address of 2 nd applicant's surname, DOB of 2 nd applica Address of 2 nd applicant's surname App2 Address of 2 nd applicant (on one line) Address of 2 nd applicant (on multiple lines) Address of 2 nd applicant (on multiple lines) FA Future / Mortgaged address (on one line) FA Future / Mortgaged address (on multiple lines) LenA LenA Lender name Lender address (on one line) LenR Lender address (on multiple lines) LenR Lender's reference Mortgage Type Secondary Type T2 Secondary Type Purchase price / current value Loan amount Pr Product name Rt Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Solicitor name SolA Solicitor address (on one line) [Case] [Case] OC OCA Other Contact address (on one line)	ıt
Addr Addrm Addrm Corresp. Address (on one line) Corresp. Address (on multiple lines) Title of 2 nd applicant f2 2 2 2 nd applicant's forename 32 App2 Address of 2 nd applicant's surname Title, forename, surname, DOB of 2 nd applicat Address of 2 nd applicant (on one line) Address of 2 nd applicant (on one line) Address of 2 nd applicant (on multiple lines) FA Future / Mortgaged address (on one line) FA Future / Mortgaged address (on multiple lines) LenA LenA Lender name LenAer address (on one line) LenR Lender address (on multiple lines) LenR Lender's reference T Mortgage Type Secondary Type Secondary Type Cu Amt Loan amount Pr Product name Product name Product Rate details Term (years) and type (e.g. interest-only) Solicitor name SolA Solicitor address (on one line) [Case] [Case] OC OC Other Contact name Other Contact name Other Contact address (on one line)	nt.
Addrm n2 ritle of 2 nd applicant f2 g2 applicant's forename s2 App2 Addr2 Addr2 Addr2 Addr2ss of 2 nd applicant (on one line) Addr2m Address of 2 nd applicant (on multiple lines) FA FA Future / Mortgaged address (on multiple line) FA Len Len LenA LenA LenA LenA LenB LenA LenR LenB FT2 Secondary Type Cu Amt Amt Amt Loan amount Pr Product name Rt Product Rate details Tm Most Fields Letter Sol SolAm Solicitor address (on multiple lines) Corresp. Address (on multiple lines) Title of 2 nd applicant Applicant (on one line) Address of 2 nd applicant (on multiple lines) Future / Mortgaged address (on one line) Future / Mortgaged address (on one line) Future / Mortgaged address (on one line) Future / Mortgaged address (on multiple lines) Future / Mortgaged address (on multiple lines) Future / Mortgaged address (on one line) Future / Mortgaged address (on one line) Future / Mortgaged address (on one line) Future / Mortgaged address (on multiple lines) Future / Mortgaged address (on one line) Future / Mortgaged	
m2 file of 2 nd applicant f2 g2 dapplicant's forename g2 App2 Addr2 Addr2 Address of 2 nd applicant (on one line) Addr2m Address of 2 nd applicant (on multiple lines) FA Future / Mortgaged address (on one line) FAm LenA LenA LenAm LenAm LenAm LenAm Lender address (on multiple lines) LenR T2 Secondary Type Cu Amt Amt Doan amount Pr Product name Rt Product Rate details Tm Most Fields Letter Sol SolA Solicitor name SolA Solicitor address (on multiple lines) Solicitor address (on one line) Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	
f2 s2 2 applicant's forename 2nd applicant's surname App2 Title, forename, surname, DOB of 2nd applicat Addr2 Address of 2nd applicant (on one line) Address of 2nd applicant (on multiple lines) FA Future / Mortgaged address (on one line) FAM Future / Mortgaged address (on multiple lines) LenA Lender address (on one line) LenA Lender address (on one line) LenA Lender address (on multiple lines) LenR Lender's reference T Mortgage Type T2 Secondary Type Cu Purchase price / current value Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) SolA Solicitor name SolA Solicitor address (on multiple lines) [Case] SolAm Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	
S2	
App2 Addr2 Addr2 Addr2m Address of 2 nd applicant (on one line) Address of 2 nd applicant (on multiple lines) FA Future / Mortgaged address (on one line) FA Len Len Len LenA LenAm LenR LenR T2 Cu Amt Amt Pr Pr Pr Product name Rt Pr Product name Rt Product Rate details Tm Sol SolA Solicitor address (on one line) Solicitor address (on one line) Solicitor address (on one line) Case] Address of 2 nd applicant (on one line) Address of 2 nd applicant Address of 2 nd applicant Address of 2 nd applicant (on one line) Address of 2 nd applicant (on one line) Future / Mortgaged address (on multiple lines) Lender address (on one line) Lender address (on one line) Secondary Type Cu Purchase price / current value Loan amount Pr Product name Sol Solicitor name Solicitor name Solicitor address (on one line) Solicitor address (on multiple lines) OC Other Contact address (on one line)	
Addr2 Address of 2 nd applicant (on one line) Addr2m Address of 2 nd applicant (on multiple lines FA Future / Mortgaged address (on one line) FAm Future / Mortgaged address (on multiple lines) Len Lender name LenA Lender address (on one line) LenR Lender address (on multiple lines) LenR Lender's reference T Mortgage Type T2 Secondary Type Cu Purchase price / current value Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sola Solicitor name Sola Solicitor address (on multiple lines) [Case] SolAm Solicitor address (on multiple lines) OC Other Contact name Other Contact address (on one line)	
Addr2m FA FA FA FUture / Mortgaged address (on one line) FAm Len Len LenA LenA LenR T2 Mortgage Type T2 Cu Amt Amt Pr Product name Rt Product Rate details Tm Most Fields Letter Sol SolA Solicitor name SolA Solicitor address (on one line) SolA Solicitor address (on one line) Solicitor address (on one line) Solicitor address (on one line) OC Other Contact address (on one line) Future / Mortgaged address (on multiple lines) Future / Mortgaged address (on multiple lines) Lender name Lender address (on one line) Future / Mortgaged address (on one line)	ant
FAM Future / Mortgaged address (on one line) FAM Future / Mortgaged address (on multiple line) Len Lender name LenA Lender address (on one line) LenR Lender's reference T Mortgage Type T2 Secondary Type Cu Purchase price / current value Loan amount Pr Product name Rt Product Rate details The Term (years) and type (e.g. interest-only) Sola Solicitor name Solicitor address (on one line) [Case] SolAm Solicitor address (on multiple lines) OC Other Contact name Other Contact address (on one line)	
FAM Len Len LenA LenA LenA LenA Lender address (on one line) LenR Lender's reference T Mortgage Type Cu Amt Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) SolA Solicitor name SolA Solicitor address (on multiple lines) SolAm OC OCA Other Contact address (on multiple line) Lender address (on one line) Lender septice / current value Lender's reference T Mortgage Type Secondary Type Cu Purchase price / current value Loan amount Pr Product name Solicit name Solicitor name Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	3)
Len LenA LenA LenAm LenAm LenR Lender address (on one line) LenR Lender's reference T Mortgage Type Cu Purchase price / current value Amt Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sol Solicitor name Solicitor name Solicitor address (on one line) [Case] Dender name Lender address (on one line) Secondary Type Cu Purchase price / current value Loan amount Pr Product name Product Rate details Tm Solicitor name Solicitor name Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	
Len LenA LenA LenAm LenAm LenR Lender address (on one line) LenR Lender's reference T Mortgage Type Cu Purchase price / current value Amt Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sol Solicitor name Solicitor name Solicitor address (on one line) [Case] Dender name Lender address (on one line) Secondary Type Cu Purchase price / current value Loan amount Pr Product name Product Rate details Tm Solicitor name Solicitor name Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	nes)
LenAm LenAm LenR Lender address (on one line) Lender address (on multiple lines) LenR T Mortgage Type T2 Secondary Type Cu Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) SolA Solicitor name SolA Solicitor address (on one line) [Case] SolAm OC OCA Other Contact name Other Contact address (on one line)	
LenAm LenR LenR T T Secondary Type Cu Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Solicitor name SolA Solicitor address (on multiple lines) OC OCA Other Contact name Other Contact address (on one line)	
LenR T Mortgage Type Secondary Type Cu Amt Doan amount Pr Product name Rt Product Rate details Term (years) and type (e.g. interest-only) Sola Solicitor name SolA Solicitor address (on one line) [Case] Lender's reference Mortgage Type Secondary Type Purchase price / current value Loan amount Pr Product Rate details Term (years) and type (e.g. interest-only) Solicitor name Solicitor address (on one line) OC Other Contact name Other Contact address (on one line)	
T T2 Secondary Type Cu Amt Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sola Solicitor name SolA Solicitor address (on one line) [Case] OC Other Contact name Other Contact address (on one line)	
T2 Secondary Type Cu Purchase price / current value Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Solicitor name Sola Solicitor address (on one line) SolAm OC OCA Other Contact name Other Contact address (on one line)	
Cu Purchase price / current value Loan amount Pr Product name Rt Product Rate details Tm Term (years) and type (e.g. interest-only) Sol Solicitor name Solicitor name Solicitor address (on one line) SolAm Solicitor address (on multiple lines) OC Other Contact name OCA Other Contact address (on one line)	
Amt Pr Rt Product name Product Rate details Tm Term (years) and type (e.g. interest-only) Sol Solicitor name SolA Solicitor address (on one line) [Case] SolAm OC OCA Other Contact name Other Contact address (on one line)	
Pr Rt Product name Product Rate details Tm Term (years) and type (e.g. interest-only) Sol Solicitor name SolA Solicitor address (on one line) SolAm OC OCA Other Contact name Other Contact address (on one line)	
Rt Tm Term (years) and type (e.g. interest-only) Sol Solicitor name SolA Solicitor address (on one line) SolAm Solicitor address (on multiple lines) OC Other Contact name OCA Other Contact address (on one line)	
Most Fields Letter Sol SolA Solicitor name Solicitor address (on one line) SolAm OC OCA OCA Term (years) and type (e.g. interest-only) Solicitor address (on one line) Solicitor address (on multiple lines) Other Contact name Other Contact address (on one line)	
Most Fields Letter Sol Solicitor name Solicitor address (on one line) SolAm OC OCA OCA OCC OCA OCC OCC Solicitor address (on multiple lines) Other Contact name Other Contact address (on one line)	
SolA Solicitor address (on one line) [Case] SolAm Solicitor address (on multiple lines) OC Other Contact name OCA Other Contact address (on one line)	
[Case] SolAm Solicitor address (on multiple lines) OC Other Contact name OCA Other Contact address (on one line)	
OC Other Contact name Other Contact address (on one line)	
OCA Other Contact address (on one line)	
· · · · · · · · · · · · · · · · · · ·	
I OCAM I Other Confact address (on multiple lines)	
ExM Existing Mortgage details ⁴	
ExL Existing Mortgage lender	
ExA Existing Mortgage amount	
ExLA Existing Mortgage lender address (on one l	.ine)
SCL 2 nd charge lender	
SCA 2 nd charge amount	
SCLA 2 nd charge lender address	
Fin Financial details	
Ad Adverse Credit details	
Proc Procuration fee	
Bro Broker (client) fee	
LP 1 st Life policy details	
AP 1 st ASU policy details	
BP 1 st B&C policy details	
Ud1 User Defined Date 1	
Ud2 User Defined Date 2	
Ud3 User Defined Date 3	
Ud4 User Defined Date 4	
Ut1 User Defined Text 1	
Ut2 User Defined Text 2	
Apt Next Appointment	
Adv Adviser Preferred name	
Adviser's forename	
Advs Adviser's surname	
Adviser's surname AT Adviser's telephone	
AM Adviser's telephone AM Adviser's Mobile	
Admin Adviser's Mobile Admin Case administrator	
Admiti Case admititistrator	

⁴ Current Value, Existing Mortgage, Existing Premium, Existing Interest Rate, Existing Lender, Debt Consolidation, 2nd Charge, 2nd Charge Lender

Page 14 of 16 MCMS001.LG v7.0



	,	
Application Process Fields Letter [Lead / Case]	Date NA Salutation SalInf ID IR n1 fl sl AddrlL AddrML n2 f2 s2 FA1 FA Oc1 ED1 PED1 AD1 Oc2 ED2 PED2 AD2 OCD LT LT2 PT PRM FutL PP SP MO DA OB Fees FeeBrok FeeVal HowMuch LoanReq DRR LS LSA CurL CurAC Adm Adv AdvF AdvS AT AM Admin DCAdv	Today's date Name(s) of applicant(s) and multi-line address Dear (informal) Dear (informal) Case ID² Reference² Title of 1st applicant 1st applicant's forename 1st applicant's surname Corresp. Address (on one line) Corresp. Address (on multiple lines) Title of 2sd applicant 2nd applicant's surname Puture / Mortgaged address (on one line) Future / Mortgaged address (on multiple lines) Appl Occupation Appl Employer Appl Previous Employer Appl Previous Employer App2 Previous Employer App2 Previous Employer App2 Previous Employer App2 Accountant Other Contact Loan Type Preferred Repayment Method Future Lender Current Value / Purchase Price PX / Sale Price Mortgage Outstanding Deposit / Savings Available Other Borrowings Added Additional Fees (Total) Added Broker Fee Valuation Fee How Much You Wish to Borrow Loan Required (Overridden?) Documents Requested/Received Lead Source Lead Source Lead Source Lead Source Address Current Lender Current A/C No Administrator Adviser's surname
Example Suitability	Apt Date App1	Adviser name from Fact Find Next Appointment Today's date Title, forename and surname of 1st applicant
Checklist [Case]	App1 App2 Address MortgagedAddress AdviserFullname	Title, forename and surname of 1 applicant Title, forename and surname of 2 nd applicant Current address (on one line) Mortgaged address (on one line) Adviser's full name
Example Adviser Observation Record [Adviser]	Date AdviserFullname	Today's date Adviser's full name
[1441501]		

Page 15 of 16 MCMS001.LG v7.0



	1	<u> </u>
Example Adviser CPD Log [Adviser]	Date AdviserFullname	Today's date Adviser's full name
Example Adviser Performance Log [Adviser]	Date AdviserFullname	Today's date Adviser's full name
Multiple Lead Fields Letter [Lead]	Date NameAddr Salutation ID IR n1 f1 s1 Appl n2 f2 s2 App2 Addr2 FutAddr LS LSA ExM ExL ExA ExLA SCL SCA SCLA Fin Ad Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name(s) of applicant(s) and multi-line address Dear Lead ID² Reference² Title of 1st applicant 1st applicant's forename 1st applicant's surname Title, forename and surname of 1st applicant Title of 2nd applicant 2nd applicant's forename 2nd applicant's surname Title, forename and surname of 2nd applicant Address of 2nd applicant (on one line) Future / Mortgaged address (on one line) Lead Source name Lead Source address (on one line) Existing Mortgage details5 Existing Mortgage lender Existing Mortgage lender Existing Mortgage lender address (on one line) 2nd charge lender 2nd charge lender 2nd charge amount 2nd charge lender address Financial details Adverse Credit details Adverse Credit details Adviser's forename Adviser's surname Adviser's surname Adviser's telephone Adviser's Mobile Lead administrator
Lead Source Letter [Lead / Case]	Date Recipient Address OurRef IR Client Adviser AdviserForename AdviserSurname AT AM Admin	Today's date Name of receipient (Lead Source) Address of receipient (Lead Source) Lead ID² Reference² Client name & address (on one line) Adviser Preferred name Adviser's forename Adviser's surname Adviser's telephone Adviser's Mobile Lead administrator

Page 16 of 16 MCMS001.LG v7.0

⁵ Current Value, Existing Mortgage, Existing Premium, Existing Interest Rate, Existing Lender, Debt Consolidation, 2nd Charge, 2nd Charge Lender