

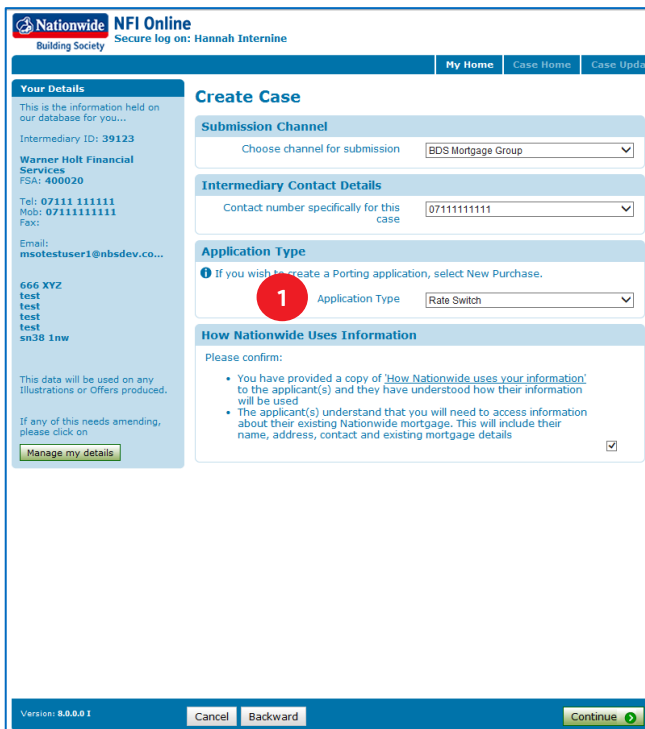
NFI Online

Rate Switch Keying Guide

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'.

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

Click 'Continue' to proceed.

Create Case

Applicant Details

1 Surname

Forename

Date of birth / /

Security Address Postcode

Mortgage Account Number

2 [Continue](#)

- 1 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.

Account Selection

Accounts Eligible to be Switched

Account Number	Existing Balance	Existing Product	Expiry Date	Current Monthly Payment	New Product	New Monthly Payment
61345903068	£19,236.59	Base Mortgage Rate	30/11/2046	£79.53	<input type="text"/>	<input type="text"/>

1 [Choose Product](#)

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

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

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

Product Selection

Can't find the product you're looking for? [Click here](#)

Mortgage Account To Be Switched

Account Number	Outstanding Balance	Term (years)	Term (months)	Current Monthly Payment
60613559040	£43,843.60	7	6	£151.33

The below products have been filtered as per your selection on the Product Filters screen, select a product to continue. If you'd like to view different products, please revisit the Product Filters screen.

Select two products to compare their features.

Eligible Products List

Product Code	Product Description	APRC	Initial Interest Rate	Booking Fee	Product Fee	Monthly Payment
541774	5 Year Base Rate Tracker	3.3%	2.24%	£0.00	£999.00	£81.84
541968	5 Year Fixed Rate	2.9%	2.19%	£0.00	£0.00	£80.01
541891	3 Year Fixed Rate	3.4%	2.14%	£0.00	£0.00	£78.19
541814	2 Year Fixed Rate	3.7%	1.99%	£0.00	£0.00	£72.71
541622	5 Year Fixed Rate	3.1%	1.99%	£0.00	£999.00	£72.71
542028	2 Year Base Rate Tracker	3.6%	1.94%	£0.00	£0.00	£70.88
541557	3 Year Fixed Rate	3.6%	1.84%	£0.00	£999.00	£67.23
541492	2 Year Fixed Rate	3.9%	1.59%	£0.00	£999.00	£58.09
541733	2 Year Base Rate Tracker	3.9%	1.54%	£0.00	£999.00	£56.27

1 Start Again

2 Continue

- 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.

Rate Switch Offer

You can view and print the Rate Switch offer below. Once the application has been submitted, a copy of the offer will be posted to the applicant(s).

1 View Offer

Confirm Consent

Please confirm that all applicants have seen the Rate Switch offer and consent to this application.

2 Yes No

Select 'Submit' to submit this Rate Switch application.

3 Submit

- 1 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'.