LANDBAY®   **Landbay Applications:** Case Change and Case Clone

Landbay have introduced case change and case clone features as a part of the application process, in order to reduce the time spent applying. Typically, these features will assist with portfolio applications or entity application mistakes. This user guide outlines the new functionality.

- **Case change:** focuses on altering mistakes made in the application.
- **Case clone:** designed to help portfolio landlord applications.

The following functionality is provided for **case change**:

1. **Add new applicant**
2. **Remove existing applicant**
3. **Purchase type changes**
   a. Change Purchase to Remortgage
   b. Change Remortgage to Purchase
4. **Entity changes**
   a. Change Company to Individual
   b. Change Individual to Company
   c. Change Company to Partnership
   d. Change Partnership to Company
   e. Change Partnership to Individual
   f. Change Individual to Partnership

The following functionality is provided for **case clone**:

5. **Duplicate Application**

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1. Add New Applicant

You can add a new applicant when the case is in the 'New' stage only

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Add New Applicant'
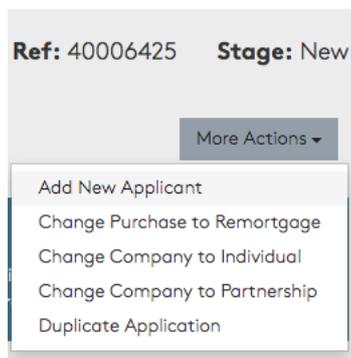
4. Answer the question 'Is the applicant being added or his or her relative has occupied or intends to occupy the property after completion?'
5. Enter Applicant details
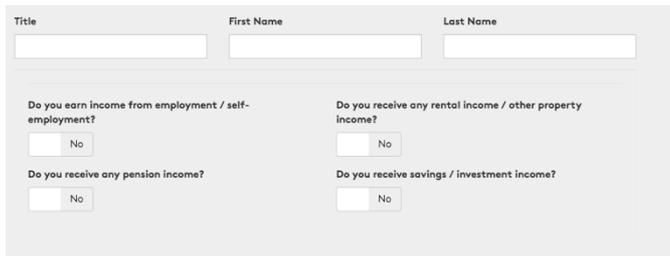
6. Select 'Next' and then select 'Finish' where you will be presented with a loading screen
   a. The loading screen can take a few seconds – the application is processing in the background.
7. You will then arrive back to the breadcrumb menu on the new Applicants Personal Details so that the rest of the new applicants' details can be added


John Smith - Personal Details

2. Remove Existing Applicant

You are able to add remove an applicant when the case is in the 'New' stage only. You will only be able to remove an applicant if there is more than one applicant on the case and the applicant is not a signatory on the Direct debit.

1. Navigate to the application dashboard
2. Select 'Delete Applicant' on the black banner heading for the applicant
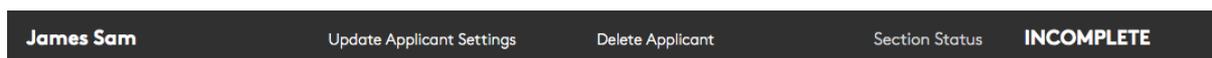
3. View the summary and select 'Finish'
4. You will then arrive back on the application dashboard where the applicant will have been removed.

3a. Change Purchase to Remortgage

You are able to change the mortgage type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Purchase to Remortgage'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Purchase to Remortgage
Change Company to Individual
Change Company to Partnership
Duplicate Application

4. Enter Purchase date

Change Purchase to Remortgage   ×

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Purchase date *

DD/MM/YYYY   🛗

Cancel   Next

5. You will be shown the summary of the change, select 'Change' to process the change
6. Arrive on the 'Purchase' tab where you will be required to enter any new fields that were not present when the case was a Purchase. Any fields that are present on both a purchase or a remortgage that were entered prior to changing the mortgage type will be kept and therefore do not need to be re-entered.

3b. Change Remortgage to Purchase
You are able to change the mortgage type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Remortgage to Purchase'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Remortgage to Purchase
Change Company to Individual
Change Company to Partnership
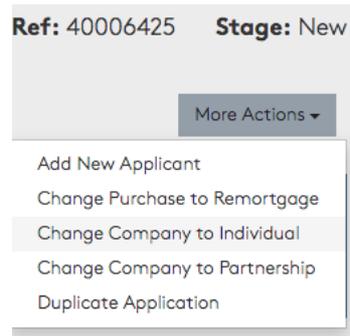Duplicate Application

4. You will be shown the summary of the change, select 'Change' to process the change
5. Arrive on the 'Purchase' tab where you will be required to enter any new fields that were not present when the case was a Remortgage. Any fields that are present on both a

purchase or a remortgage that were entered prior to changing the mortgage type will be kept and therefore do not need to be re-entered.

4a. Change Company to Individual

You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Company to Individual'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Purchase to Remortgage
Change Company to Individual
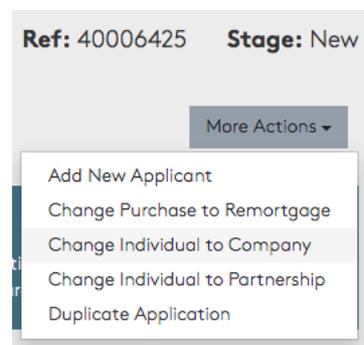Change Company to Partnership
Duplicate Application

4. You will be shown the summary of the change, select 'Change' to process the change
5. You will arrive back on the application dashboard view where the company will have been removed, with the individual applicants only remaining

4b. Change Individual to Company

You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Individual to Company'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Purchase to Remortgage
Change Individual to Company
Change Individual to Partnership
Duplicate Application

4. Enter the registered name and registered number of the company and select 'Next'

Change Application from Individual to Company   ✕
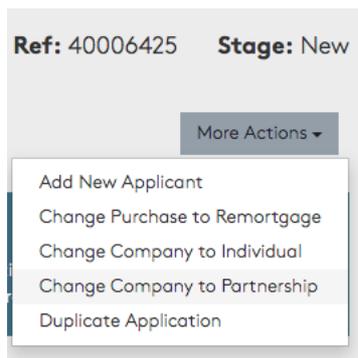
Registered Name

Registered Number

Cancel   Next

5. You will be shown the summary of the change, select 'Change' to process the change
6. You will arrive on the 'Company' tab where you will be required to complete the rest of the company information

4c. Change Company to Partnership
You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Company to Partnership'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Purchase to Remortgage
Change Company to Individual
Change Company to Partnership
Duplicate Application

4. Enter the registered name of registered number of the partnership and select 'Next'

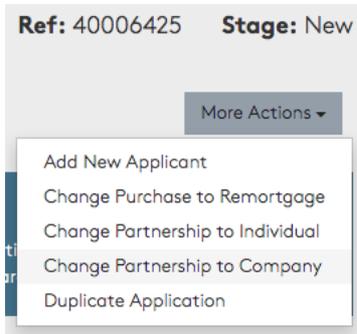Wizard - Change Application Type From Company To Partnership   ✕

Registered Name

Registered Number

Cancel   Next

5. You will be shown the summary of the change, select 'Change' to process the change
6. You will arrive on the 'Company' tab where all information already entered for the Company will be restored for the Partnership

4d. Change Partnership to Company
You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Partnership to Company'

4. Enter the registered name and registered number of the company and select 'Next'
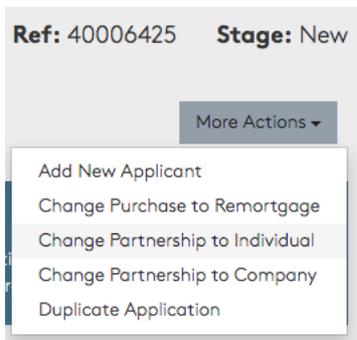

5. You will be shown the summary of the change, select 'Change' to process the change
6. You will arrive on the 'Company' tab where all information already entered for the Company will be restored for the Partnership

4e. Change Partnership to Individual
You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
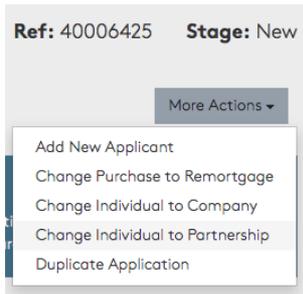3. Select 'Change Partnership to Individual'

4. You will be shown the summary of the change, select 'Change' to process the change

5. You will arrive back on the application dashboard view where the Partnership will have been removed, with the individual applicants only remaining

4f. Change Individual to Partnership
You are able to change the application type when the case is in the 'New' stage only.

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Change Individual to Partnership'

Ref: 40006425   **Stage:** New

More Actions ▾

Add New Applicant
Change Purchase to Remortgage
Change Individual to Company
Change Individual to Partnership
Duplicate Application

4. Enter the registered name and registered number of the partnership

Wizard - Change Application Type From Individual To Partnership   ×

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Registered Name

Registered Number

Cancel   Next

5. You will be shown the summary of the change, select 'Change' to process the change
6. You will arrive on the 'Company' tab where you will be required to complete the rest of the partnership information

5. Duplicate Application
You are able to duplicate an application at any stage of the application lifecycle. Once a case has been duplicated, the new case will start at the Quick Quote stage where the Quick Quote is required to be completed before moving to the Submitted stage.

The following data points will be copied across:
- Applicant data including income
- Portfolio information
- Solicitor details

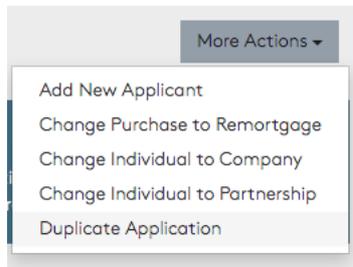The following data points will not be copied across:
- Uploaded documents
- Product requirements
- Purchase requirements

- The security property
- Direct debit agreement

1. Navigate to the application dashboard view
2. Select the 'More Actions' drop down in the top right-hand corner of the application dashboard
3. Select 'Duplicate Application'

4. Answer questions around the application type and then select 'Next'

5. Select what applicants you would like to be on the new case and then select 'Next'

6. Select whether you would like to change the mortgage type or not and then select 'Next'

7. You will be shown the summary of the change, select 'Finish' to process the change
8. You will then arrive on the Quick Quote Details screen where you are required to complete the Quick Quote details. The application will then flow as per the normal Quick Quote process and then into a full case submission as per the usual process. Please note that you will not be able to go straight to a case submission without going through the Quick Quote, however all details entered in the Quite Quote will be carried through to your full application.