



Toolbox Firm Guide

Lead Source

The screenshot displays the 'Lead Source Commissions' page in the PRIMIS Mortgage Network. The left-hand navigation menu is highlighted, showing 'Branch Details' and 'Lead Sources' as active sections. The main content area is divided into two sections: 'Lead Sources' and 'Lead Source Commissions'. The 'Lead Sources' section features a table with columns for 'Reference Number', 'Lead Source Name', and 'Active', currently showing 0 entries. Below this is the 'Lead Source Commissions' form, which includes input fields for 'Lead Source Reference Number' and 'Lead Source Name', and a checkbox for 'Active'. A red box highlights the 'Add' button, and another red box highlights the 'Edit' button. A 'Back' button is also visible.

- Select Branch details
- Lead source
- Edit
- Add all the information
- This will now appear on the drop down on the main client details



Compliance Summary

https://www.ftstoolbox.com/dashboard/branch/DoBranchComplianceSummary.do

PRIMIS Mortgage Network ...

Convert Select

File Edit View Favourites Tools Help

branch type: Directly Authorised Region: network: PTFS DA Administration Firm: Commission Rating: None (0%)

Summary Business

Branch Details

- Main
- Contact
- Sub Agencies
- Profile
- Company Search
- Registrations
- Authorisations
- Personnel
- Network Information
- Network Contact
- Notes
- DA Information
- Lead Sources
- Lead Allocation
- Local Introducer
- Commissions
- Self Subscriptions
- Internal Referrer
- Commissions
- Network
- Commissions
- Internet Introducer
- Details
- Branch Admin
- Paraplanning
- Services
- Compliance Summary**
- Retention Rates

Compliance Summary Template

Product Category: Mortgage

View

- Select branch details
- Select compliance summary
- Choose product category
- Select view

https://www.ftstoolbox.com/dashboard/branch/DoBranchComplianceSummary.do

PRIMIS Mortgage Network ...

Convert Select

File Edit View Favourites Tools Help

branch type: Directly Authorised Region: network: PTFS DA Administration Firm: Commission Rating: None (0%)

Summary Business

Branch Details

Back Edit

Compliance Summary Details

Product Category: Mortgage

Last Update Date: 17/11/2018 Update By:

Add Compliance Summary Section

Add

Compliance Summary Sections

Section Name	Mandatory	Position	Notes	Delete
Express Consent Document	<input type="checkbox"/>			
Terms of Business / General Terms and Conditions / Disclosure Document	<input checked="" type="checkbox"/>			
Fee Agreement	<input type="checkbox"/>			
Witness Expression / Accompaniment Form	<input type="checkbox"/>			
Valid ID Check	<input checked="" type="checkbox"/>			
Fact Find	<input checked="" type="checkbox"/>			

- Select Edit



- Add a new section
- choose if you want a section mandatory or not

The screenshot shows a web browser window with the URL <https://www.fstoolbox.com/dashboard/branch/DeBranchComplianceSummary.do>. The page title is 'PRIMIS Mortgage Network'. The main content area is titled 'Add Compliance Summary Section' and includes a form with a dropdown menu and an 'Add' button. Below this is a table of 'Compliance Summary Sections' with columns for 'Section Name', 'Mandatory', and 'Notes'. The table lists various document types, their mandatory status, and a 'Delete' button for each. A red box highlights the 'Delete' button for the first row, and another red box highlights the 'Mandatory' checkbox for the second row.

Section Name	Mandatory	Notes
Express Consent Document	<input type="checkbox"/>	Delete
Terms of Business / General Terms and Conditions / Disclosure Document	<input checked="" type="checkbox"/>	Delete
Fee Agreement	<input type="checkbox"/>	Delete
Witness Expression / Accompaniment Form	<input type="checkbox"/>	Delete
Valid ID Check	<input checked="" type="checkbox"/>	Delete
Fact Find	<input checked="" type="checkbox"/>	Delete
Last 3 months Bank Statements	<input checked="" type="checkbox"/>	Delete
3 x Paylips /Accounts / SA302's	<input checked="" type="checkbox"/>	Delete
Benefit Statements/Other Income	<input type="checkbox"/>	Delete
Proof of Deposit/Gifted Deposit Letter	<input type="checkbox"/>	Delete

- Delete and sections not relevant to your business
- Change the order of the documents



Sales Tracking

Mortgage Policy

- Select Distributor / Packager
- Select Product
- Policy Summary
- Basic Details**
- Fee and Commission Details
- DA Commission Details
- Maintain Fee
- Agreement Records
- OCM Payaway Rates
- Contact Notes
- Compliance Checklist
- Letter Generation
- Address Book
- This Policy Sales Tracking**
- Quality Reviews

Basic Details

Lender Name* Virgin Money Product* Virgin Money Mortgage Edit

Mortgage Account Number

Pre-Toolbox

Sales Workflow Manor Cottage Remortgage Select Date Created 23/06/2020

Advisor

Branch

Self Select Company

Partner Select Delete Company

Lead Source

Introducing Branch

- Select this policy sales tracking

https://www.fstoolbox.com/dashboard/policy/DoAgentSalesTracking.do

PRIMIS Mortgage Network

Convert Select

File Edit View Favourites Tools Help

Mortgage Policy

Letter Generation

Address Book

Quality Reviews

Provider Contact Details

Contact:

Telephone Number:

Mobile Number:

Email Address:

Client Contact Details

Daytime Telephone:

Evening Telephone:

Mobile Telephone:

Preferred Contact:

Primary Email:

[View All Notes](#) Add Stage Complete Tasks Compliance Summary Lead Tracking

Sales Tracking

Stage	Attachments	Status	Last Updated Date	Last Updated By	Order
1		Incomplete			▲▼
2		Incomplete			▲▼
3		Incomplete			▲▼
4		Incomplete			▲▼
5		Incomplete			▲▼
6		Incomplete			▲▼
7		Incomplete			▲▼
8		Incomplete			▲▼
9		Incomplete			▲▼
10		Incomplete			▲▼
11		Incomplete			▲▼
12		Incomplete			▲▼
13		Incomplete			▲▼
14		Incomplete			▲▼

Next Review Date

For Review By None

Back Add New Task Save

- Add stages
- updates stages
- Add new task to yourself or colleagues