

Importing client data from Trigold to MortgageBrain Anywhere

MortgageBrain Anywhere provides the ability to import client data and documents from Trigold ensuring that your business is never interrupted with your clients.

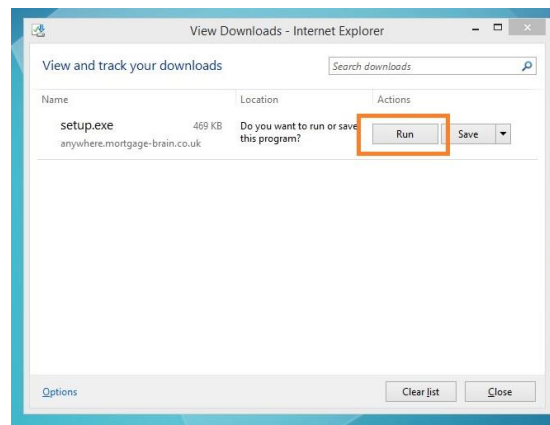
To import your clients, simply follow the process below. Please note, before installing, you must:

- Ensure you have already registered to use MortgageBrain Anywhere
- Ensure that you have logged out of MortgageBrain Anywhere
- Ensure you are running the install facility on the same machine as Trigold

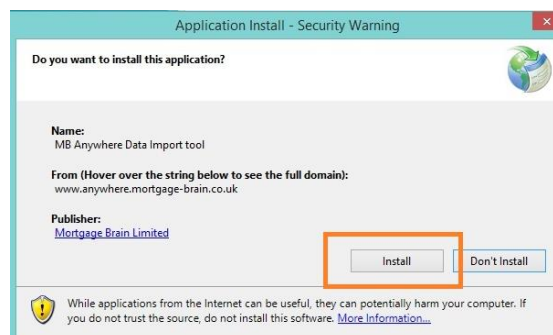
Firstly, click on the link to install the import application:

<https://www.anywhere.mortgage-brain.co.uk/dataimport/setup.exe>

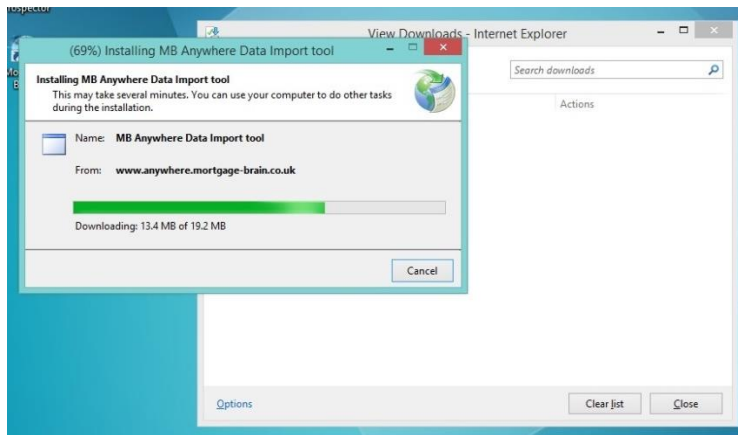
The following screen will appear:



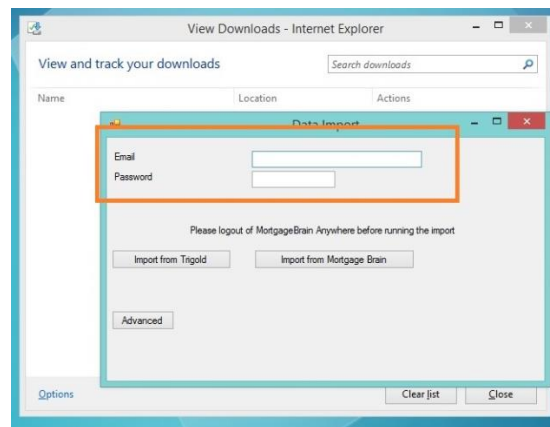
Select Run from the options given. The import utility will start to run. You will then be prompted by the next screen to Install, as shown.



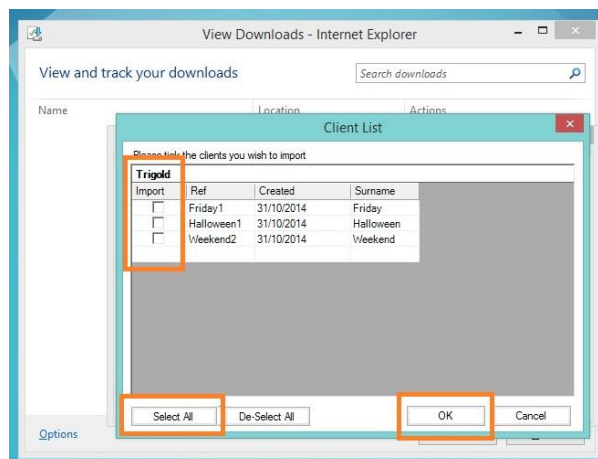
The Import utility will install at this stage. You will see a progress bar showing the install procedure, as shown.



Once the application has finished installing, the next screen requires you to enter your MortgageBrain Anywhere email address and password:

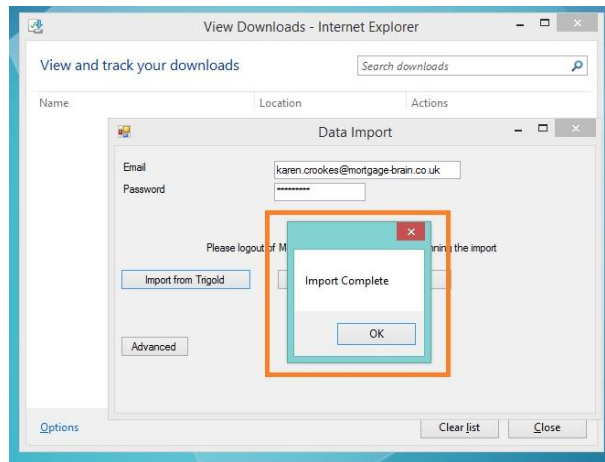


Once your details are entered, select Import from Trigold. A list of clients is displayed (this may take a minute or two).



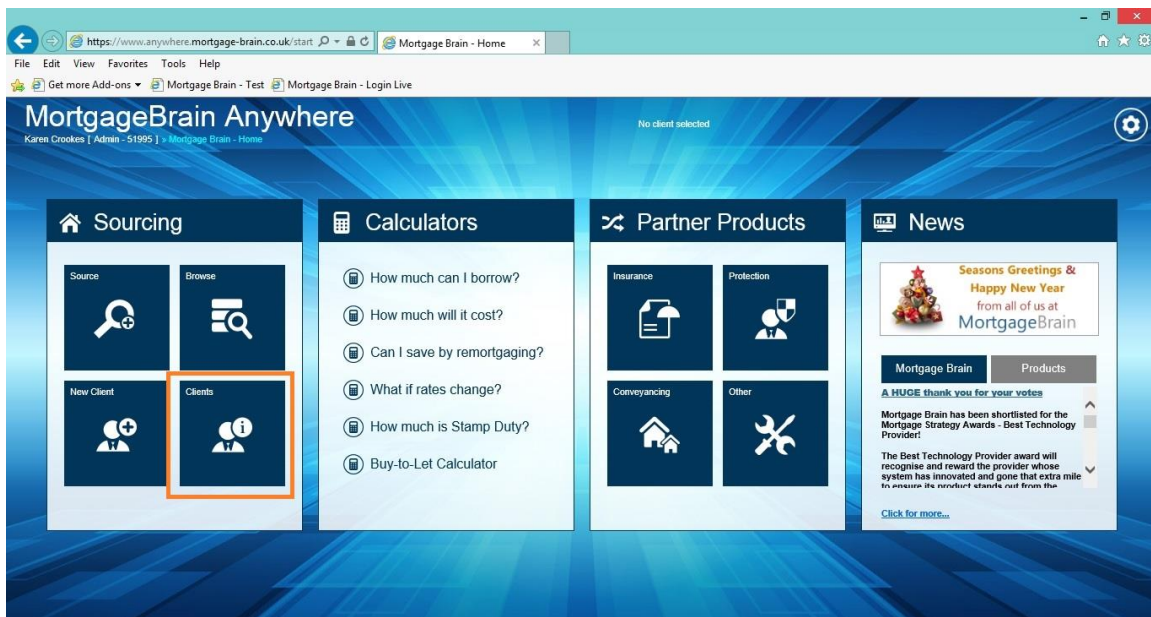
You can choose to manually select the clients you wish to import by checking the box adjacent to the client's name. Alternatively, you can choose Select All which will import all of the clients from Trigold to MortgageBrain Anywhere, together with any documentation produced for the client. Once you have made your choice, click OK for the import to be carried out.

A progress bar is shown for each client as it is imported into MortgageBrain Anywhere. Once all clients have been imported, the application will confirm this:

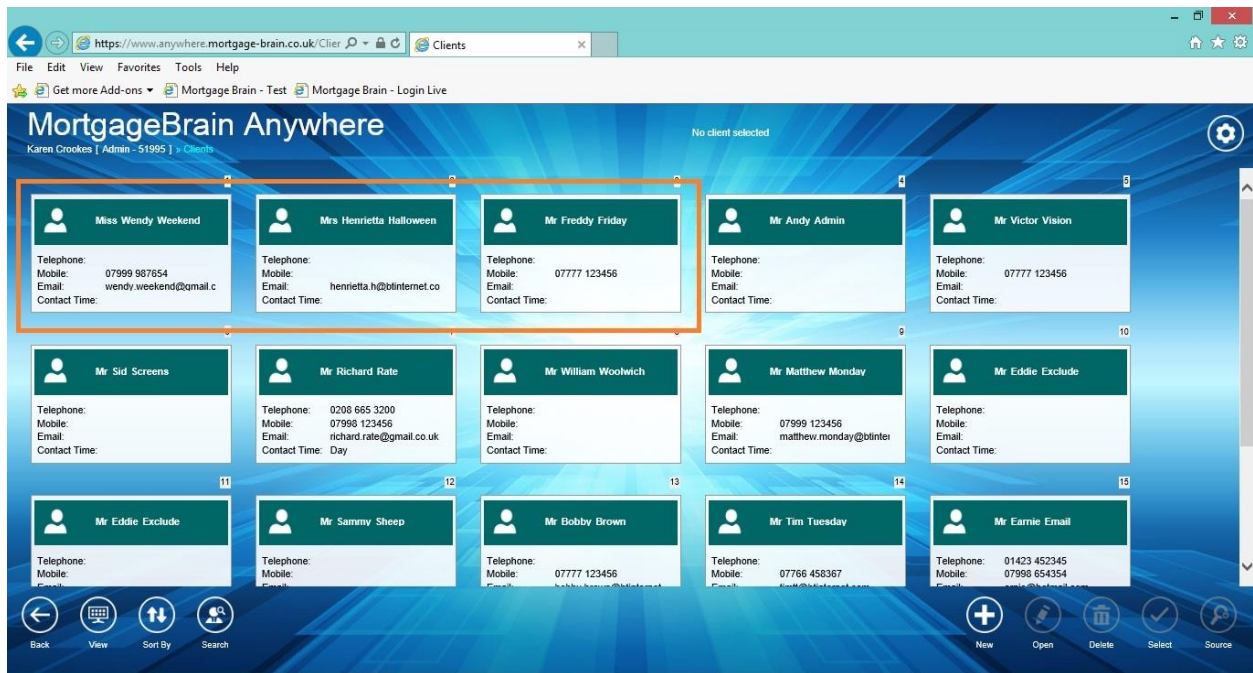


Please note that the import utility does not look to see if the clients are already there, so if you run it twice for the same clients then you will get duplicate client entries within MortgageBrain Anywhere.

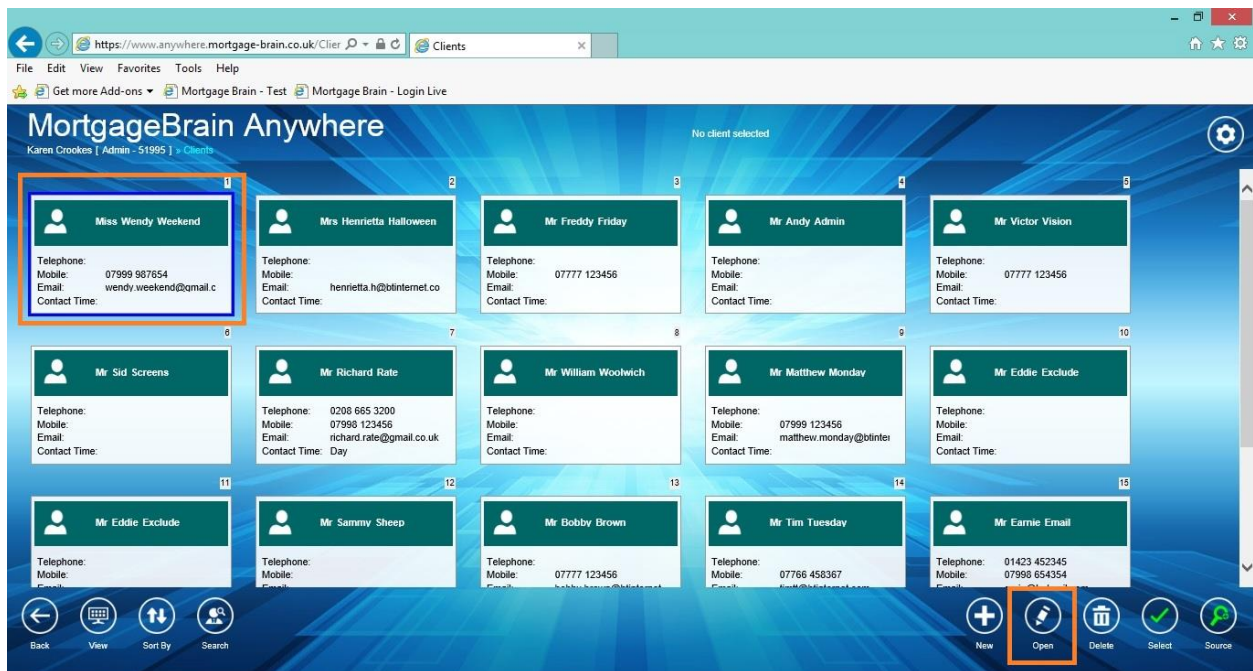
Once the clients are imported, to view them in MortgageBrain Anywhere, log in and select Clients from the home screen.



The client database will open up and you will see the clients you imported at the beginning of your client list.



By selecting one of the clients and clicking Open, this will open up the client file whereby you will see the client data, together with any documentation which was previously saved for the client.



The screenshot shows the MortgageBrain Anywhere web application interface. The browser address bar displays <https://www.anywhere.mortgage-brain.co.uk/edit/> and the page title is "Edit Client". The user is logged in as "Karen Crookes [Admin - 51995]". The interface is titled "MortgageBrain Anywhere" and indicates "No client selected".

The interface is divided into three main panels, each highlighted with an orange border:

- Applicant 1:** Contains personal information for Wendy Weekend, including Title (Miss), First Name (Wendy), Surname (Weekend), D.O.B. (09/08/1988), Sex (Female), Marital Status (Other), Email (wendy.weekend@gmail.com), Telephone, Mobile (07999 987654), Best Time to Contact, Salary (39,650), and Regular.
- Mortgage Details:** Contains mortgage-related information, including Property Price (245,000), Deposit / Equity, Loan Required (125,000), LTV (51.02%), Term (25 yrs), Shared Ownership (unchecked), Mortgage Type (Home Mover), Payment Type (Repayment), Adverse Credit (unchecked), Buy to Let (unchecked), House (selected), Flat (unchecked), Bedrooms (2 bedrooms), and Tenure (Freehold).
- Documents:** Contains a table of documents:

Description	Created
Mortgage Quote - Leeds Building Society, Welcome Mortgage 0% for 6 Months then, Repayment, 31/10/14	17-12-14
Summary of Sourcing Filters	17-12-14

At the bottom of the interface, there are navigation buttons: "Cancel", "Applicant 2", "Save + Close", "Select", and "Source".