

Intermediary user guide

Case search

Case search

The most recent 10 cases will always be displayed but you can search for older cases by using the 'Case Search' button:

[Home](#) [Illustration](#) [DIP](#) [Product switch](#) [Case Search](#) [My profile](#)

Search criteria

| | | | |
|-------------------|----------------------|-------------------|----------------------|
| Case ID | <input type="text"/> | Case status | <div>Select ▼</div> |
| Applicant surname | <input type="text"/> | Property postcode | <input type="text"/> |
| Date created from | <input type="text"/> | Date created to | <input type="text"/> |
| Broker name | <input type="text"/> | | |

Clear Search ✕

Search 🔍

You will be able to search all your cases by:

- Case ID
- Case status – all cases relating to the status selected will be displayed

Select

Illustration in Progress

Illustration Produced

DIP In Progress

DIP Accept

DIP Refer

DIP Decline

DIP Illustration Produced

Application in Progress

Application Accept

Application Refer

Application Decline

Application Submitted

Application Reviewed

Valuation Instructed

Valuation Received

Offer Issued

COT Received

Completed

Cancel / Decline

Delayed completion

DIP Expired

- Applicant surname
- Property postcode
- Date created

The stage a case has reached is always displayed throughout the process:

Application Status

Offer Issued

DIP in Progress

✓

DIP Accept

✓

DIP Illustration Produced

✓

Application in Progress

✓

Application Accept

✓

Application Submitted

✓

Application Reviewed

✓

Application Refer

✓

Valuation Instructed

✓

Valuation Received

✓

Offer Issued

✓

COT Received

✓

Funds Approved

✓

Completed

✓



Intermediary Sales and Support team
0345 241 3597
ist@westbrom.co.uk

Head Office: 2 Providence Place, West Bromwich B70 8AF
www.westbrom.co.uk

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