



**Toolbox ↔ HBOS**

**Integration Guide**

To integrate Toolbox with HBOS, please follow the guide as below:

The latest version of the Halifax Intermediary software must be installed on your machine prior to integrating with Toolbox, to check if you have the latest version please open Halifax Intermediary program.

When this opens, click on 'Help' at the top of the screen, then click 'About' the version number will appear on the screen. The version that you require is 'Version 9'.

If you have previously received a CD, please visit [https://www.halifax-intermediariesonline.co.uk/mem\\_bin/formslogin.asp](https://www.halifax-intermediariesonline.co.uk/mem_bin/formslogin.asp) to download the latest version.

If you do not have the software please call 0845 6080038 or email [posqueries@hbosplc.com](mailto:posqueries@hbosplc.com) to request a CD.

Open Toolbox and enter your username and password, then click 'Login'.



When you are logged in to Toolbox, click on the 'Individual Client' tab at the top of the site, when this loads, click on the 'Add New Client' button.

Personal Touch Financial Services – HBOS Integration Guide

<b>Personnel</b>	<b>Corporate Client</b>	<b>Individual Client</b>	<b>Policy</b>	<b>Tasks</b>
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<b>Client Name:</b>	<b>Client Number:</b>	<b>Created By:</b>
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Search			
<b>Client Forename:</b>	<input type="text"/>	<b>Client Surname:</b>	<input type="text"/>
<b>Partner Forename:</b>	<input type="text"/>	<b>Partner Surname:</b>	<input type="text"/>
<b>Client Number:</b>	<input type="text"/>	<b>Postcode:</b>	<input type="text"/>
<b>Status:</b>	<input type="text" value="Client"/>	<b>or Policy No:</b>	<input type="text"/>
<b>Agent Surname:</b>	<input type="text"/>	<b>Administrator:</b>	<input type="text"/>
<b>Include Closed:</b>	<input type="checkbox"/>		
		<b>Add New Client</b> ▶	<b>Search</b> ▶

Enter the details of the client that you wish to process and click the create button.

<ul style="list-style-type: none"> <li>Offline Synchronisation</li> <li>Download Offline Fact Find Software</li> <li>ID Check</li> <li>This Lead Tracking</li> <li>Policies</li> <li>Letter Generation</li> <li>Diary/Tasks</li> <li>Create/View Sales</li> <li>Issue IDD</li> <li>Fact Find</li> <li>Fact Find Details</li> <li>Personal Details</li> <li>Product Specific Questions</li> <li>Fact Find Summary</li> <li>Get Quotation</li> <li>Make Application</li> <li>Compliance Summary</li> <li>Compliance Checklist</li> <li>Create Policies</li> <li>Branch Address Book</li> </ul>	<div style="background-color: #4a69bd; color: white; padding: 2px;"><b>Personal Details</b></div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Title :</td><td>Mr</td></tr> <tr><td>Forename * :</td><td>John</td></tr> <tr><td>Middle name :</td><td></td></tr> <tr><td>Surname * :</td><td>Smith</td></tr> <tr><td>Informal Salutation :</td><td></td></tr> <tr><td>Date of Birth * :</td><td>01/01/1950</td></tr> <tr><td>Gender :</td><td>Male</td></tr> <tr><td>Partner Name :</td><td><input type="button" value="Select"/> <input type="button" value="Add"/></td></tr> </table>	Title :	Mr	Forename * :	John	Middle name :		Surname * :	Smith	Informal Salutation :		Date of Birth * :	01/01/1950	Gender :	Male	Partner Name :	<input type="button" value="Select"/> <input type="button" value="Add"/>																										
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<input type="button" value="Cancel"/> <span style="float: right;"><input type="button" value="Create"/></span>																																											

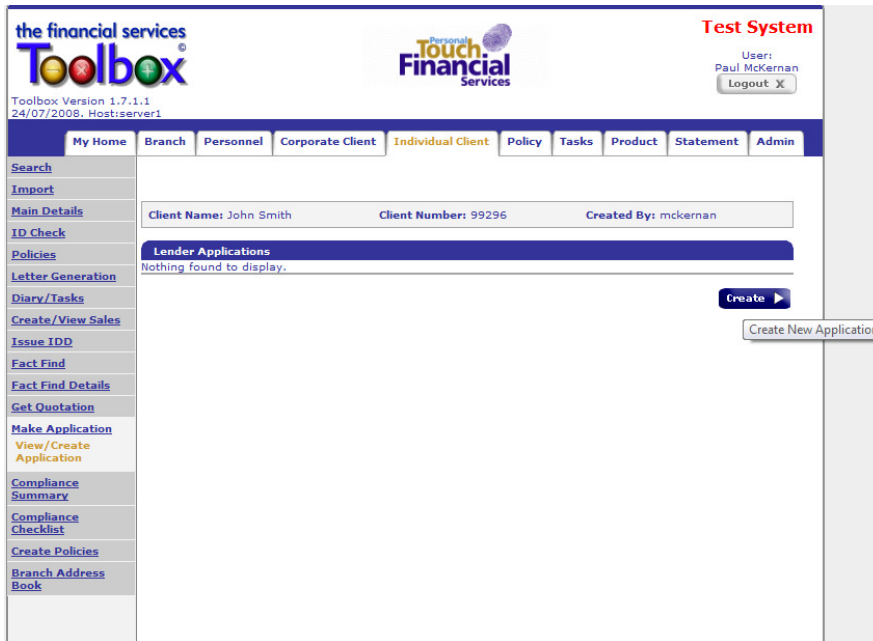
Enter a name for the 'Sales Workflow' and select 'Mortgages' as the 'Factfind type', then click the 'Add' button.

The screenshot shows the 'Personal Touch Financial Services' web application. The top navigation bar includes 'My Home', 'Branch', 'Personnel', 'Corporate Client', 'Individual Client' (selected), 'Policy', 'Tasks', 'Product', 'Statement', and 'Admin'. The left sidebar contains various menu items such as 'Search', 'Import', 'Main Details', 'ID Check', 'Policies', 'Letter Generation', 'Diary/Tasks', 'Create/View Sales', 'Issue IDD', 'Fact Find', 'Fact Find Details', 'Personal Details', 'Product Specific Questions', 'Fact Find Summary', 'Get Quotation', 'Make Application', 'Compliance Summary', 'Compliance Checklist', 'Create Policies', 'Branch Address Book', and 'Book'. The main content area displays client information for 'John Smith' (Client Number: 99296) and a 'Please Note' regarding existing sales workflows. Below this is a table for 'Existing Sales Workflows' which is currently empty. The 'Create New Sales Workflow' form is active, with 'Description' set to 'HBOS Sale', 'Factfind type' set to 'Mortgage', and 'Advisor' set to '1 OCM(ID 7520)'. An 'Add' button is visible at the bottom of the form.

Complete the Factfind in the normal way.

<ul style="list-style-type: none"> <li><a href="#">Policies</a></li> <li><a href="#">Letter Generation</a></li> <li><a href="#">Diary/Tasks</a></li> <li><a href="#">Create/View Sales</a></li> <li><a href="#">Issue IDD</a></li> <li><a href="#">Fact Find</a></li> <li><b><a href="#">Fact Find Details</a></b> <ul style="list-style-type: none"> <li><b><a href="#">Personal Details</a></b></li> <li><a href="#">Dependants/Children</a></li> <li><a href="#">Your Home</a></li> <li><a href="#">Employment Details</a></li> <li><a href="#">Secondary Employment Details</a></li> <li><a href="#">Income</a></li> <li><a href="#">Existing mortgage Details</a></li> <li><a href="#">Life Policy Details</a></li> <li><a href="#">Mortgage Repayment Plans (ISA, Endowment, Pension Provision and Other Investments)</a></li> <li><a href="#">Assets</a></li> <li><a href="#">Liabilities</a></li> <li><a href="#">Total Net Assets</a></li> <li><a href="#">Outgoings</a></li> <li><a href="#">Credit History</a></li> <li><a href="#">Current Situation</a></li> <li><a href="#">New Mortgage Feature Importance</a></li> <li><a href="#">Mortgage Repayment Options</a></li> <li><a href="#">Establishing Your Concerns</a></li> <li><a href="#">In The Event Of Death</a></li> <li><a href="#">In The Event Of Illness</a></li> <li><a href="#">ASU Cover Required</a></li> <li><a href="#">Determining the level of critical illness cover required</a></li> <li><a href="#">Please Remember</a></li> </ul> </li> </ul>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th colspan="2">Personal Details</th> </tr> </thead> <tbody> <tr> <td>Applicant 1 and Applicant 2?</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Title :</td> <td>Mr ▾</td> </tr> <tr> <td>Forename * :</td> <td>John</td> </tr> <tr> <td>Middle Name :</td> <td></td> </tr> <tr> <td>Surname * :</td> <td>Smith</td> </tr> <tr> <td>Date Of Birth * :</td> <td>01/01/1950 </td> </tr> <tr> <td>NI Number :</td> <td></td> </tr> <tr> <td>Daytime Telephone :</td> <td>01217 671000</td> </tr> <tr> <td>Evening Telephone :</td> <td>01217 671000</td> </tr> <tr> <td>Mobile Telephone :</td> <td>07777 123456</td> </tr> <tr> <td>Email addresses:</td> <td><input type="text" value="Email Address"/></td> </tr> <tr> <td>Add Email address</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Marital Status :</td> <td>▾</td> </tr> <tr> <td>Previous Title :</td> <td>▾</td> </tr> <tr> <td>Previous Forename :</td> <td></td> </tr> <tr> <td>Previous Surname :</td> <td></td> </tr> <tr> <td>Nationality :</td> <td></td> </tr> <tr> <td>Smoker :</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Notes :</td> <td><div style="border: 1px solid #ccc; height: 40px;"></div></td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Next"/> </div>	Personal Details		Applicant 1 and Applicant 2?	<input type="checkbox"/>	Title :	Mr ▾	Forename * :	John	Middle Name :		Surname * :	Smith	Date Of Birth * :	01/01/1950	NI Number :		Daytime Telephone :	01217 671000	Evening Telephone :	01217 671000	Mobile Telephone :	07777 123456	Email addresses:	<input type="text" value="Email Address"/>	Add Email address	<input type="button" value="Add"/>	Marital Status :	▾	Previous Title :	▾	Previous Forename :		Previous Surname :		Nationality :		Smoker :	<input type="checkbox"/>	Notes :	<div style="border: 1px solid #ccc; height: 40px;"></div>
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When the Factfind has been completed, click on the 'Make Application' button and then the 'Create' button.



Enter 'Halifax' or "Bank of Scotland" into the 'Provider Name' box and click 'Search', when the results appear as shown, click 'Select' for the lender you wish to apply to.

**Mortgage Provider Search**

Provider No

Provider Name

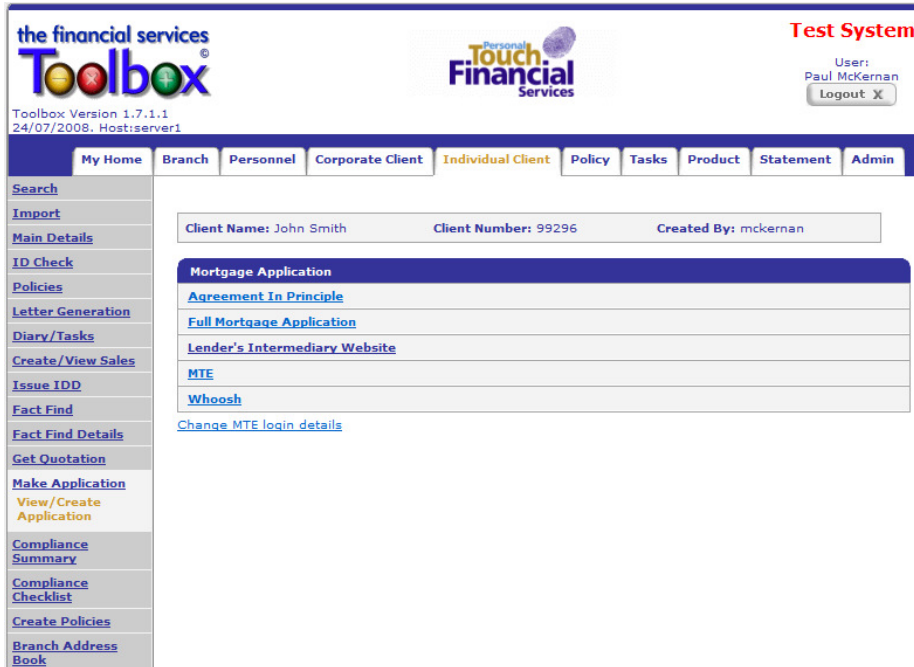
**Search** ▶

**Provider Results**

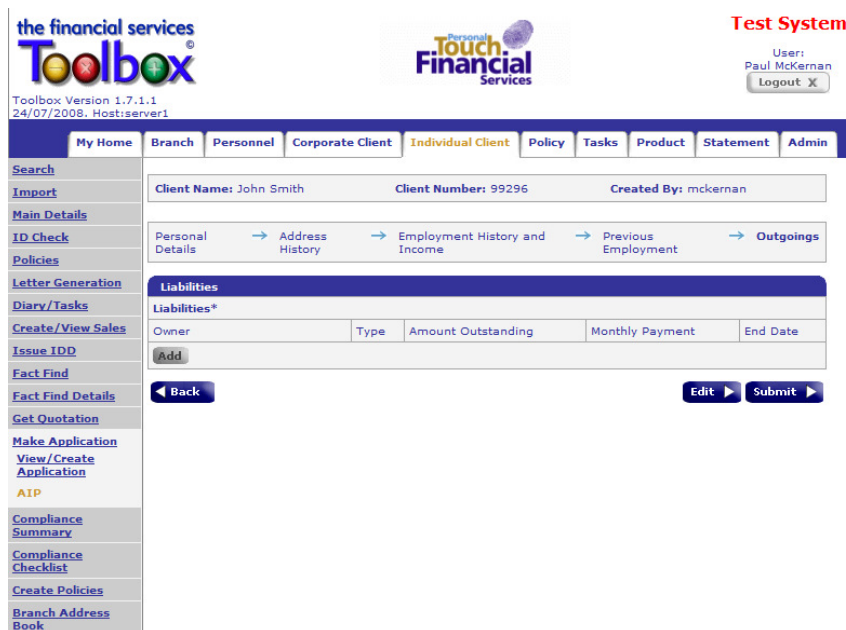
Provider No	Provider Name	Action
1062	Halifax (HBOS)	<b>Select</b>

One item found.

On the following screen, click on either ‘Agreement In Principle’ or ‘Full Mortgage Application’, depending on the required application type.

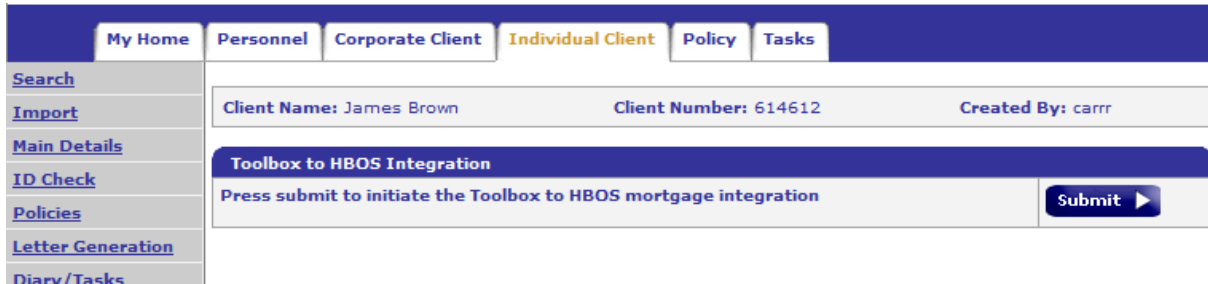


The client details that were entered in the Factfind have been pulled through into this section. Click ‘Next’ on each screen, checking the details and completing any missing sections. Once you have completed the ‘Outgoings’ page click on the ‘Submit’ button.

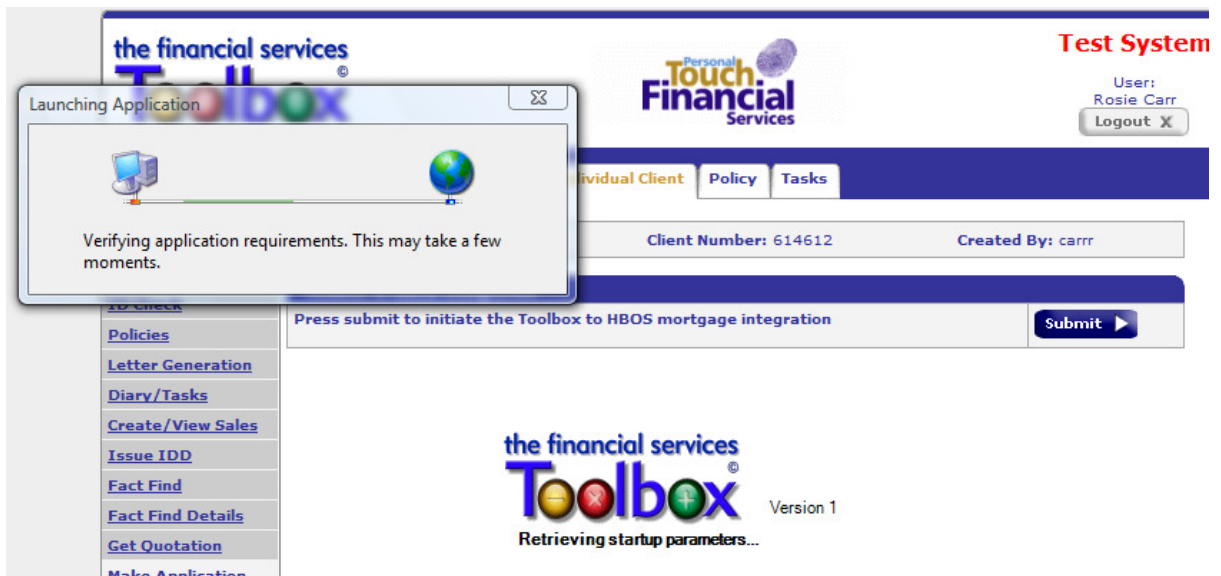


If there are any missing details in the application, **red text will appear** with details of the missing or incorrect information to be entered or changed.

If there is no red text at the top of the page, click 'Submit' or make any changes necessary to the application and then click the 'Submit' button.



A small box detailing the processes being carried out will appear, while the integration between Toolbox and HBOS is being carried out.



When the integration has been completed, the following screen will appear and you can continue through the HBOS application. You will notice that a large proportion of the application fields are pre-populated with data from Toolbox.

The screenshot shows a web browser window titled "Intermediary Mortgages". The page header includes the Halifax logo and "Intermediaries Online". The main content area is titled "Welcome to Halifax Intermediary Mortgage Application" and asks the user to "Please confirm the following details:". There are four dropdown menus for "Number of applicants", "Is this a remortgage?", "Is this application supported by a guarantor?", and "Include Key Facts Illustration", all showing "N". To the right, under "Scheme(s) required", there is a table of "Available Schemes" with checkboxes for Building Mortgage, Capital Raising, Flexible, Home Improvements, Rent To Mortgage, Retirement Home Plan Non Annuity, Right To Buy, Second Home Loan, Shared Equity, and Shared Ownership. A note below the table states: "Schemes are an optional item, if no schemes are applicable then please move on to the next screen." At the bottom right, there are "Close" and "Next" buttons.

Scheme(s) required	
Available Schemes	
<input type="checkbox"/>	Building Mortgage
<input type="checkbox"/>	Capital Raising
<input type="checkbox"/>	Flexible
<input type="checkbox"/>	Home Improvements
<input type="checkbox"/>	Rent To Mortgage
<input type="checkbox"/>	Retirement Home Plan Non Annuity
<input type="checkbox"/>	Right To Buy
<input type="checkbox"/>	Second Home Loan
<input type="checkbox"/>	Shared Equity
<input type="checkbox"/>	Shared Ownership

**Schemes are an optional item, if no schemes are applicable then please move on to the next screen.**

### Useful Contact Information:

#### For Halifax Intermediary issues:

Tel No: 0845 608003

Email: [posqueries@hbosplc.com](mailto:posqueries@hbosplc.com)

#### For Toolbox issues:

Tel No: 0121 7671000

Email: [Support@PersonalTouchFS.com](mailto:Support@PersonalTouchFS.com)