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.

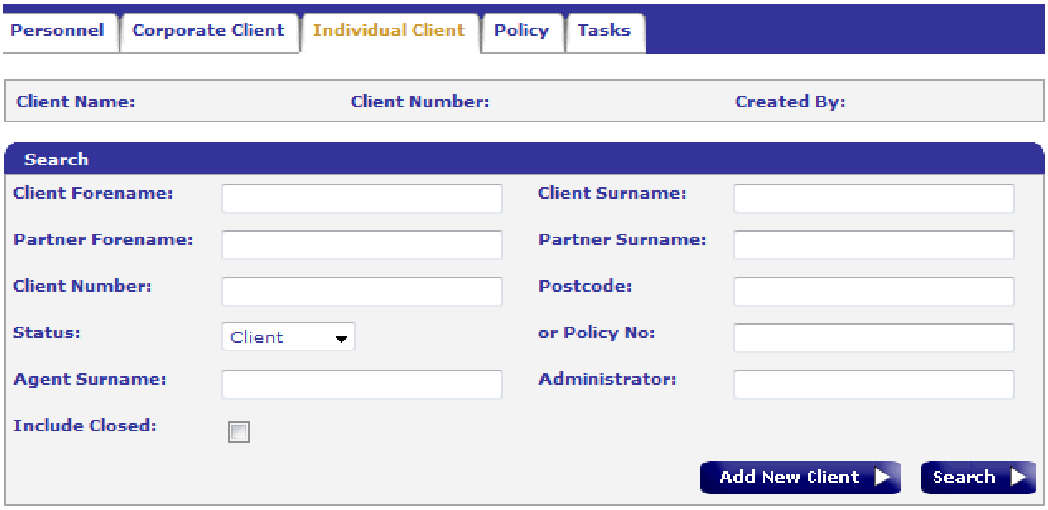
When this opens, click on 'Help' at the top of the screen, then click 'About' the version number will appear on the screen. The version that you require is 'Version 9'.

If you have previously received a CD, please visit https://www.halifax-intermediariesonline.co.uk/_mem_bin/formslogin.asp to download the latest version.

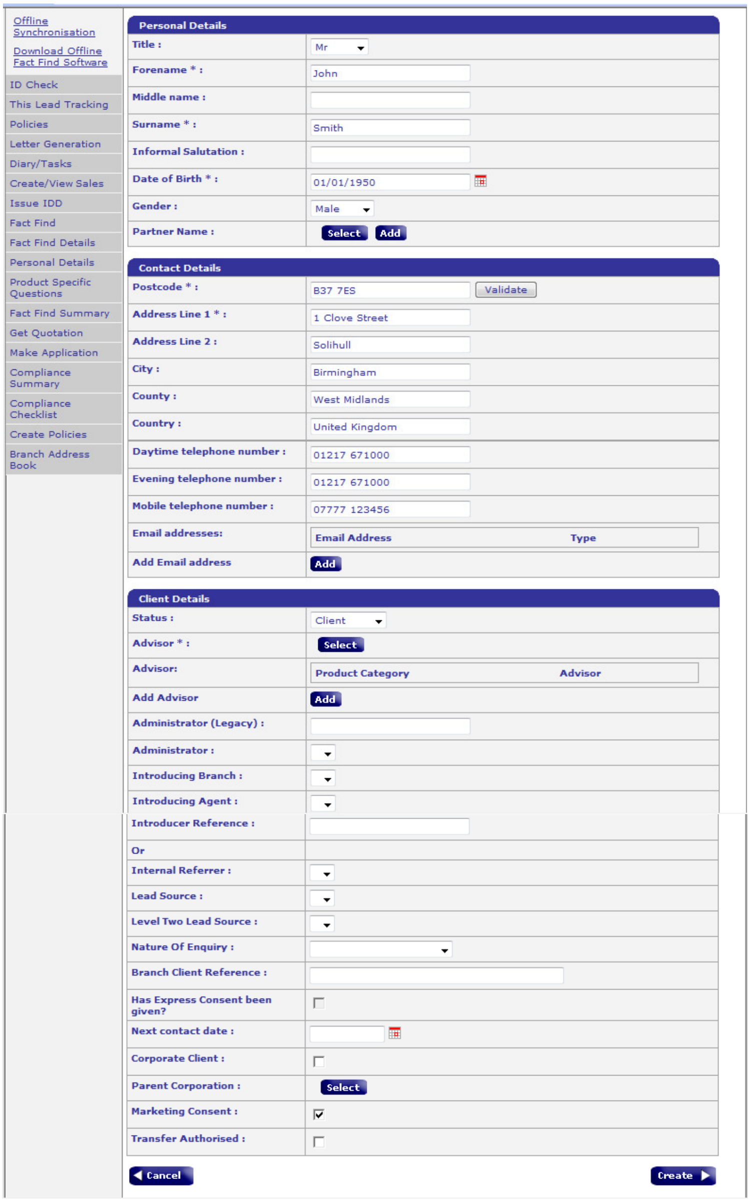
If you do not have the software please call 0845 6080038 or email posqueries@hbosplc.com to request a CD.

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

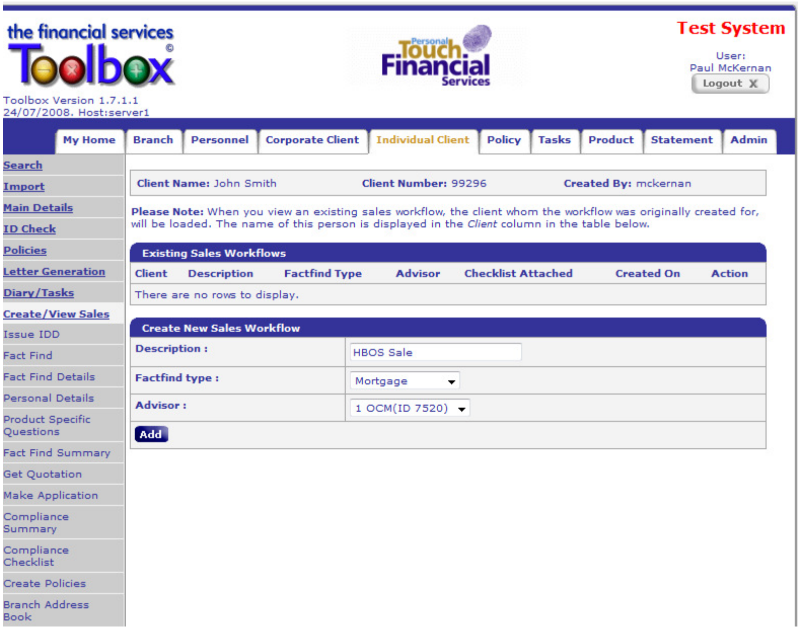
When you are logged in to Toolbox, click on the 'Individual Client' tab at the top of the site, when this loads, click on the 'Add New Client' button.


Personnel
Corporate Client
Individual Client
Policy
Tasks
Client Name:
Client Number:
Created By:
Search
Client Forename:
Client Surname:
Partner Forename:
Partner Surname:
Client Number:
Postcode:
Status:
Client
or Policy No:
Agent Surname:
Administrator:
Include Closed:
Add New Client
Search

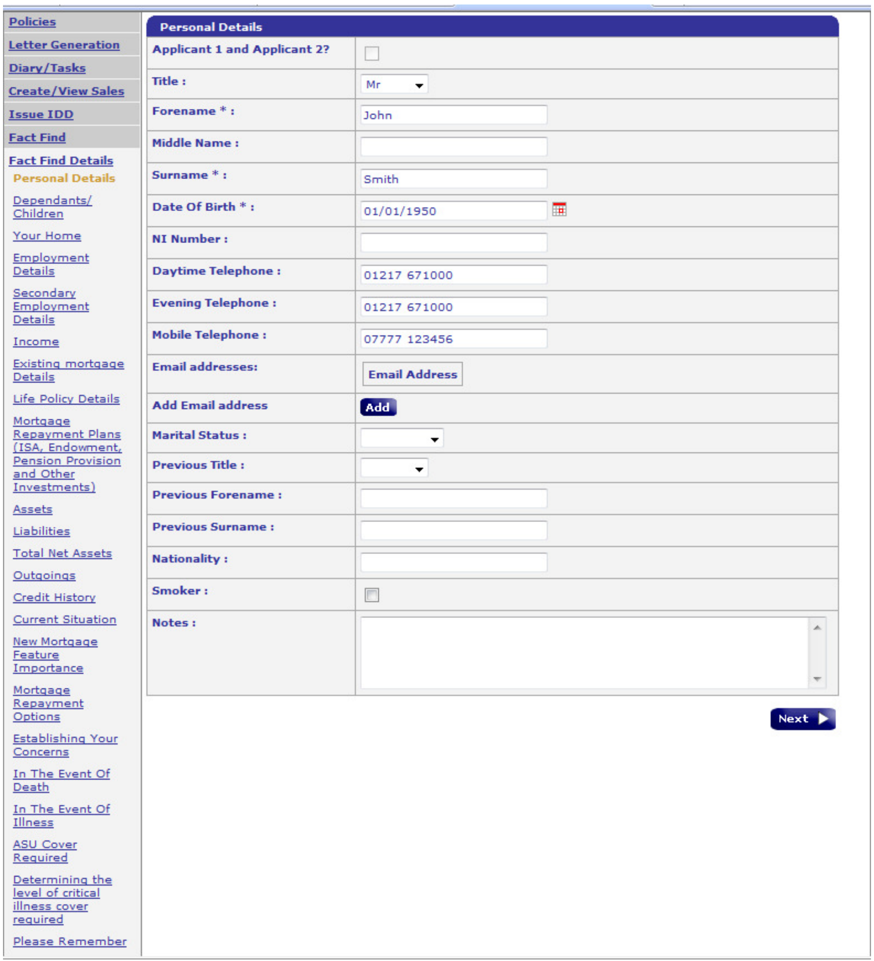
Enter the details of the client that you wish to process and click the create button.



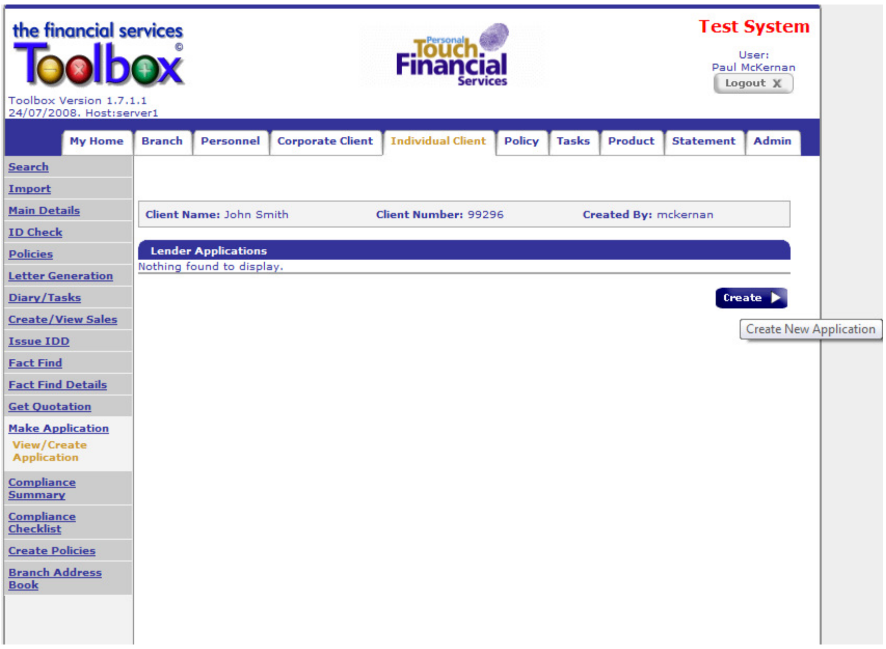
Enter a name for the 'Sales Workflow' and select 'Mortgages' as the 'Factfind type', then click the 'Add' button.



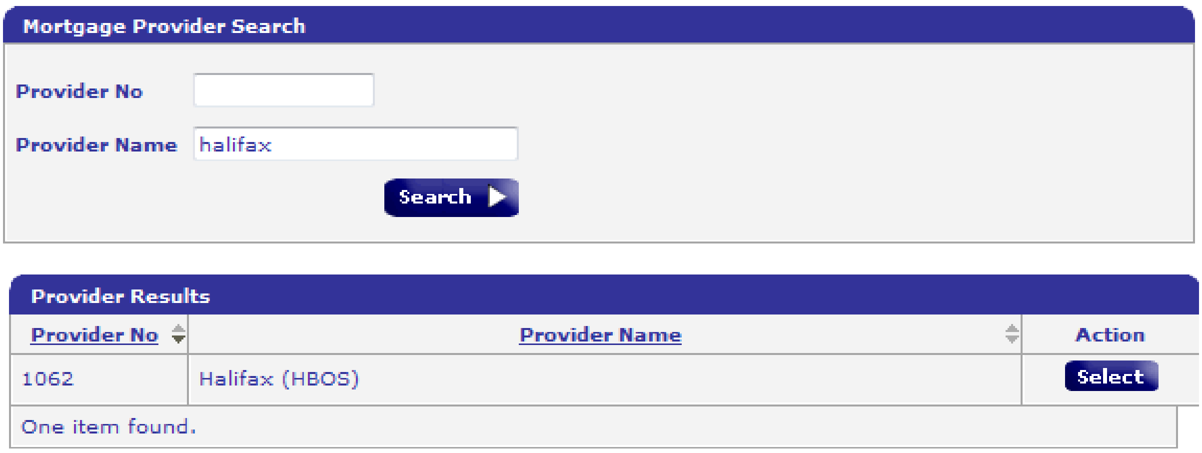
Complete the Factfind in the normal way.



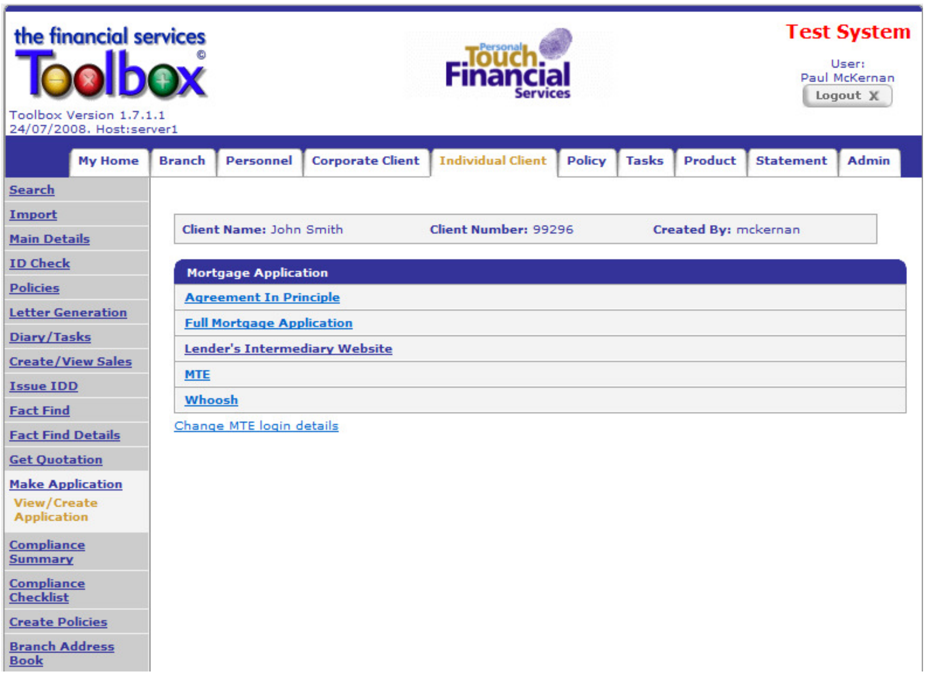
When the Factfind has been completed, click on the 'Make Application' button and then the 'Create' button.



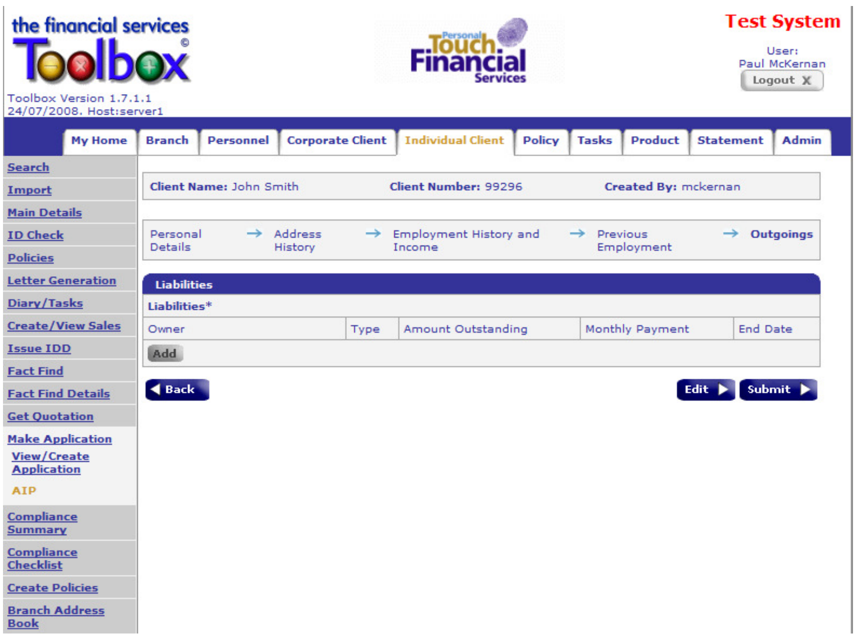
Enter 'Halifax' or "Bank of Scotland" into the 'Provider Name' box and click 'Search', when the results appear as shown, click 'Select' for the lender you wish to apply to.



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

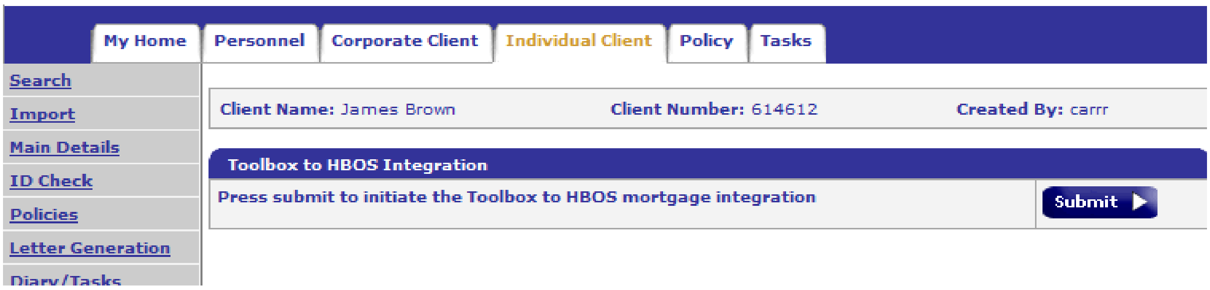


The client details that were entered in the Factfind have been pulled through into this section. Click 'Next' on each screen, checking the details and completing any missing sections. Once you have completed the 'Outgoings' page click on the 'Submit' button.

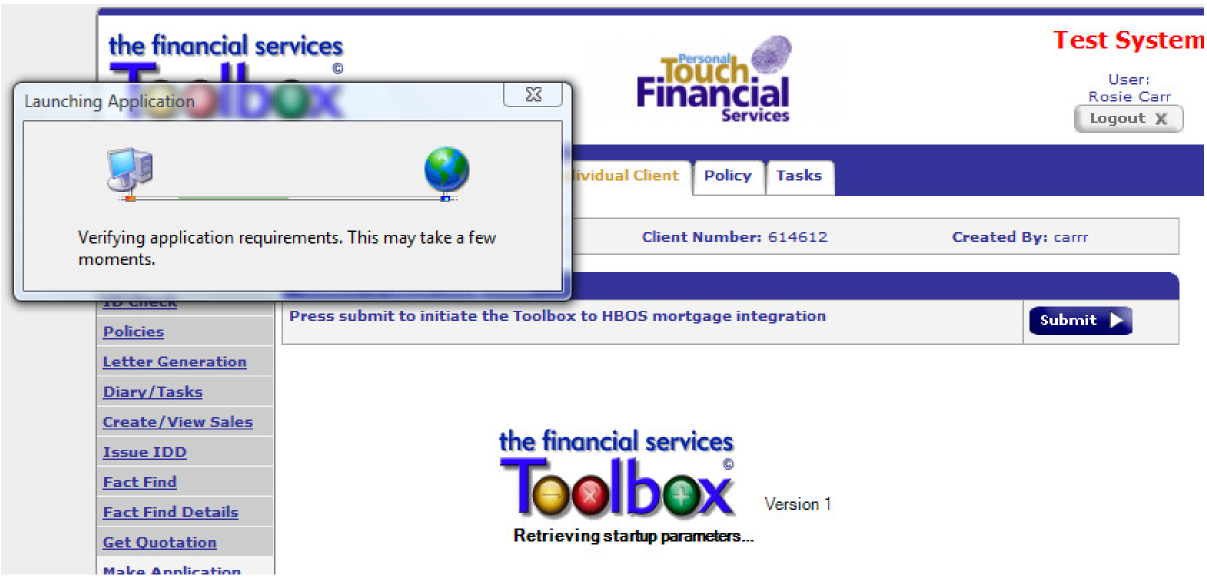


If there are any missing details in the application, red text will appear with details of the missing or incorrect information to be entered or changed.

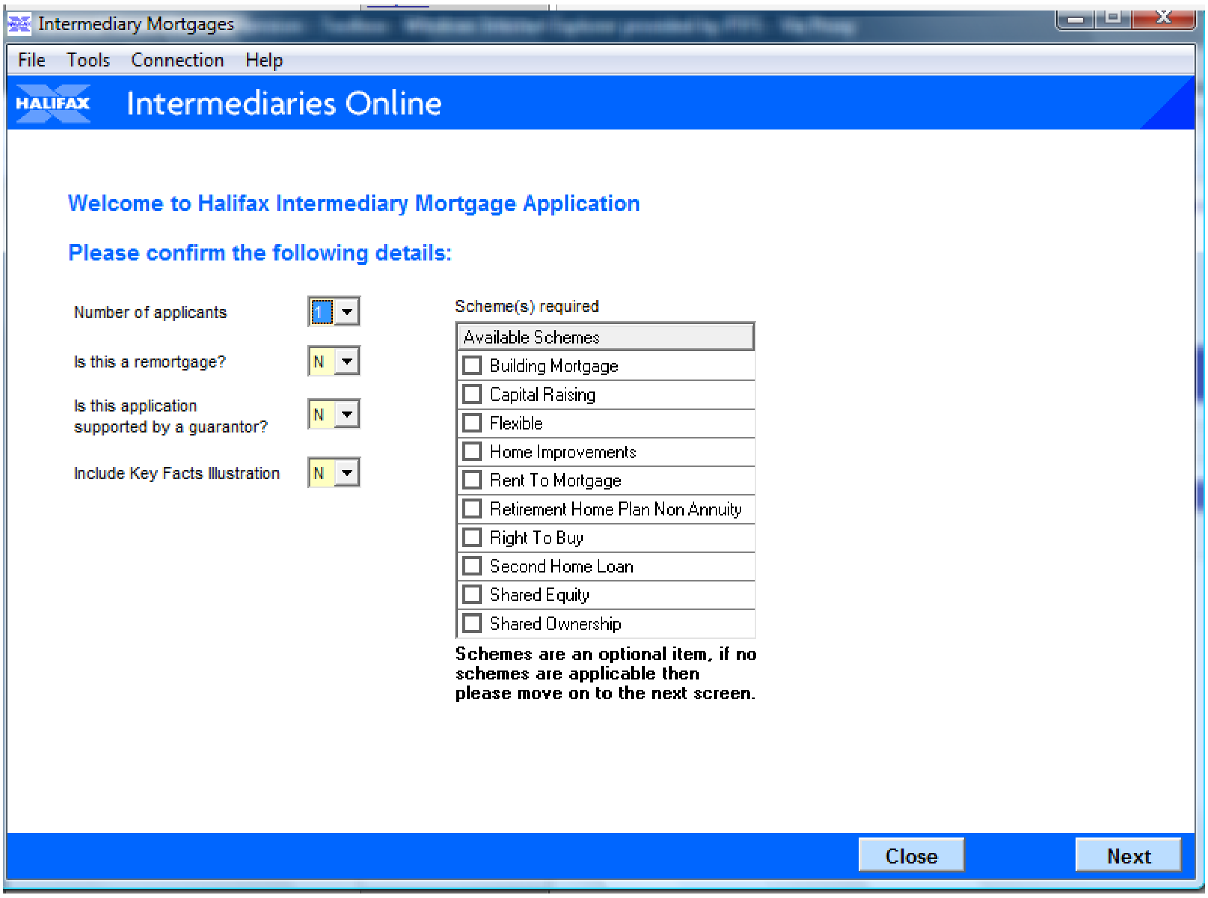
If there is no red text at the top of the page, click 'Submit' or make any changes necessary to the application and then click the 'Submit' button.



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.



Useful Contact Information:

For Halifax Intermediary issues:

Tel No: 0845 608003
Email: posqueries@hbosplc.com

For Toolbox issues:

Tel No: 0121 7671000
Email: Support@PersonalTouchFS.com