



Mortgage Application

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Overview

Thoroughly documenting a customer's details is critical with processes as complex as mortgage applications. This form has over 230 fields, taking the applicant through a series of questions about their financial circumstances. Data is categorised in an ordered fashion through sections of the form; such as "Address history" and "Employment and Income details".

Additional features

Show/hide Field Permissions: Many of the form's fields will not be relevant for the applicant except under certain circumstances. For this reason, many of the fields remain hidden until certain conditions are met.

In the example seen here, if the applicant has selected 'yes' to a valuation, then the field '*Do you wish to arrange a more comprehensive survey?*' is then allowed to appear.

☐ Comprehensive survey

Do you wish to arrange a more comprehensive survey?
comprehensive_survey

Copy rights from group

	All		Applicants		Underwriters		Admin		Submitter of ticket		Ticket handler	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
= Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Not set	Not set	Not set	Not set
= Valuation = Yes	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow	Not set	Not set	Not set	Not set

Head to the *Field Visibility* tab in the form once imported onto your site to see the full list of rules in place.

Custom messages: The use of phrases like 'ticket' might not suit as well as 'application', so we have used the *Custom Messages* area to change the wording whenever it appears.

Admin / Infocapture / Mortgage Application / Custom messages

Project options

Project Summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

Custom messages

Replace the default phrasing of the form with words of your choice. For example, 'View Ticket' can change to 'View Feedback Form' and 'List of Tickets' can change to 'List of Feedback Forms'

List of tickets	Mortgage Applications
Submit ticket	Submit Mortgage Application
View ticket	View Mortgage Application
Update issue	Update application
Clone issue	Clone application
Delete issue	Delete application
Ticket submitted	Application has been submitted
Issue has been updated	Application has been updated