# Submit a DIP on impact portal

*impactPortal* is your easy-to-use broker CRM system for submitting, tracking, and controlling your client applications. The system has a host of features to help save you time and assist in managing your cases throughout the application process. To help get you started, below are the steps to submit a DIP to impact packaging.

## 01 Search impactpackaging.co.uk

Scroll to the bottom of the page until you see **Place. Source. Track with *impactPortal***

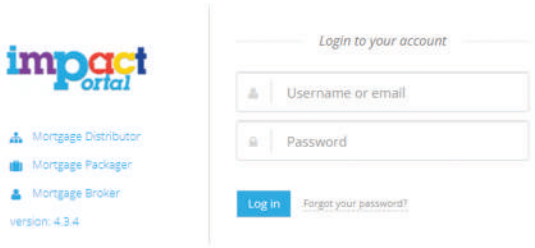



## 02 Register your account

Click **Register** > Fill out the required details.

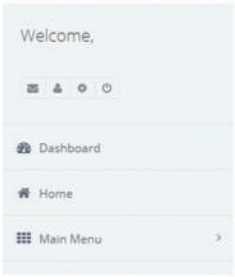
Once completed, **login** to *impactPortal*.

**Returning customers can skip this step and login.**




## 03 You are now in the Dashboard

On the left is a menu bar showing:
**Dashboard**, **Home** and **Main Menu**

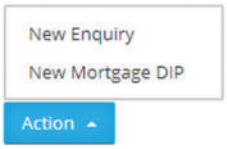



## 04 Create a new DIP

Click on **Main Menu** > Click **Cases.**

This is where you can search for your cases, as it is your first time this section will be empty.

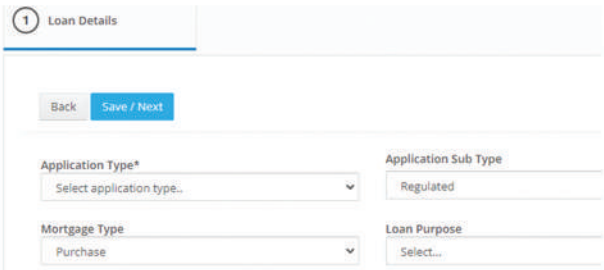
Scroll to the bottom of the page. Find and click the **Action** button > click **New Mortgage DIP**




## 05 Submit the DIP

Fill in your case details.

Click **Save/Next** at the top or bottom of the page and continue to fill out the form until you see a **submit** button.




## 06 Process your Case Enquiry

We will now get in touch with you using the details provided on your registration. We usually get back to you same day.

Our standard office hours are Monday to Friday, 9 am to 5:30 pm.



## TIPS!

- Make sure details are correct first time to prevent any delays!
- Make as many notes as possible in the case summary section on the New Mortgage DIP page, so our sales consultants can pick up your case with ease.
- Upload any credit files for your adverse cases, or any supporting documents that may be needed.

Call on **01403 272625** or email **info@impactsf.co.uk**