



PROGRESSIVE ONLINE CASE TRACKING INSTRUCTIONS

1. Log in to the online portal and click on **'Manage Illustration(s), Decision(s) in Principle and Application(s)'** under the **Existing client** section of your dashboard.

The screenshot shows the Progressive Building Society online portal dashboard. At the top, there is a navigation bar with 'My Home' and 'My Account' tabs. Below the navigation bar, there is a welcome message and a maintenance notice. The main content area is divided into two sections: 'New client' and 'Existing client'. The 'Existing client' section contains a link labeled 'Manage Illustration(s), Decision(s) in Principle and Application(s)', which is highlighted with a red arrow.

2. Enter at least two search criteria to find your client's record and then click **Find**. In the case of a joint application, you should search for Applicant 1.

The screenshot shows the Progressive Building Society online portal client search page. The search criteria fields are: Last name (empty), Date of birth (00/00/0000), and Postcode (empty). The 'Find' button is visible below the fields.

3. The search result will be displayed. Click on your client(s) First name 'in red' to open the client detail.

The screenshot shows the Progressive Building Society online portal client search results page. The search criteria fields are: Last name (Test), Date of birth (01/01/1990), and Postcode (empty). The 'Find' button is visible below the fields. The search results table shows a client with the first name 'Mr' highlighted in red, indicated by a red arrow.



4. The application status will be displayed accordingly i.e. **Application submitted successfully, Documentation outstanding, Application ready for Offer, Mortgage Offer Issued, Case complete / funds released.**

The screenshot shows the Progressive Building Society client portal. At the top left is the logo. On the right, there are links for 'FAQs', 'Messages (0 unread)', and 'Log out'. Below the logo is a navigation bar with 'My Home' and 'My Client' tabs. The main heading is 'Client Mr Test'. Below this is a message box stating: 'Please note the portal will be unavailable from 00:00 to 03:00 while we undertake routine maintenance. We apologise for any inconvenience this may cause you.' with a 'Hide message' button. The section 'Your Client's Application(s)' contains a table with the following data:

Daily Interest Base Rate	
Reference	70100289666
Initial interest rate %	4.75%
Loan Amount Required £	80,000.00
Repayment Period	15 Years
Initial monthly repayment £	951.07

Application submitted successfully

[Upload and view supporting documents](#)

[View all of the Application information \(PDF\)](#)

[View the Mortgage Illustration for this Application \(PDF\)](#)