eligible™

Key Data Fields

Data Requirements

Data should be provided in a csv/xlsx format. Please provide data for all live mortgages. Segmentation for agreed communication will take place in system.

Client Data Fields

- Client ID
- Client Name
- Client Email Address
- Client Phone Number
- Client Date of Birth
- Advisor Name
- Advisor Email
- Mortgage Property Address
- Property Value
- Original Mortgage Amount
- Lender Name
- Mortgage Product Description (e.g. part and part split, tracker peg etc.)
- Part and part split - ***if not provided the split will be loaded as 100% repayment***
- Initial Term Start Date
- Initial Term Expiry Date
- Preferential Rate
- Full Term
- Interest Rate Type (e.g. Fixed, Tracker)
- Interest Rate After Initial Rate
- Mortgage Type (e.g. BTL vs RESI)
- Repayment Method (e.g. Interest Only, Capital + Interest)
- CRM IDs (Client, Property and / or Mortgage)
- Initial Rate*
- Initial Monthly Payment*
- LTV*
- ERP End Date*
- ERP Charges or Description*

**Not critical, or will be calculated*

Once you have this information, please upload it directly into Retain via file manager.
https://app.eligible.ai/uploads

****Contracted clients only**

Data Transfer

For Eligible to undertake the financial analytics and contact process, Client Data must be extracted from CRM and uploaded directly to Retain.

As with any transfer of personally identifiable or sensitive information care needs to be exercised to ensure that staff undertaking the work have the appropriate training and that Information Security procedures are adhered to.

Under no circumstances should customer data be sent externally via email without first being encrypted and third-party file sharing applications such as Dropbox are prohibited. Client Data in a CSV format can be uploaded directly into Retain via file manager for contracted clients.

Our support and technical teams are available at support@eligible.ai should you have any queries or concerns.