

Intermediary user guide

Registering, logging in and managing
your profile

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How to register with us

To place business with the West Brom for intermediaries you will first need to register with us. You can either contact the Intermediary Sales and Support team on **0345 241 3597**, by email **ist@westbrom.co.uk** or through your Principal who will provide you with a unique URL. The URL will take you through to the registration screen:

The screenshot shows the 'Company registration' section of the West Brom registration form. The 'Your company FCA register number *' field is empty, and a green arrow points from a callout box to this field. The callout box contains the text: 'Enter your FCA firm reference number (FRN). The details will be validated and the Company details and correspondence address will be displayed'. Below the input field is a green 'Find Details' button with a dropdown arrow. At the bottom of the form are 'Cancel' and 'Next' buttons.

The screenshot shows the 'Company registration' section of the West Brom registration form with the 'Your company FCA register number *' field filled with '405712'. Below this is the 'Company details' section with the following information: 'Consumer credit licence number' (empty), 'Registered company name' (Sequence ERM Limited), 'Company address' (Cumbria House, 16-20 Heckle Street, Loughton Buzzard, Bedfordshire, LU7 1GN), and 'Company authorised status' (Appointed Representative). Below this is the 'Your branch/office correspondence address' section with radio buttons for 'Existing location' (selected) and 'New location'. A dropdown menu shows a list of addresses, with 'Cumbria House, 16-20 Heckle Street, Loughton Buzzard, Bedfordshire, LU7 1GN' selected. At the bottom of the form are 'Cancel' and 'Next' buttons.

If multiple addresses are displayed, the correct address must be highlighted before clicking 'Next'. If an alternative address needs to be registered this can be done by clicking on 'New location' which will expand the fields to be completed. Please note, any correspondence we send to you will be forwarded to the address you register with us.

Your branch/office correspondence address

Existing location New location

London House 10, 20, 30, 40, 50, 60, 70, 80, 90, 100, 110, 120, 130, 140, 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, 260, 270, 280, 290, 300, 310, 320, 330, 340, 350, 360, 370, 380, 390, 400, 410, 420, 430, 440, 450, 460, 470, 480, 490, 500, 510, 520, 530, 540, 550, 560, 570, 580, 590, 600, 610, 620, 630, 640, 650, 660, 670, 680, 690, 700, 710, 720, 730, 740, 750, 760, 770, 780, 790, 800, 810, 820, 830, 840, 850, 860, 870, 880, 890, 900, 910, 920, 930, 940, 950, 960, 970, 980, 990, 1000

Cancel Next

If the selected firm has more than one Principal, you will need to select one from the list displayed.

Once the address details have been captured the registration screen will be displayed.

Personal details

Enter all your personal details. The email address should be the one you want to use for communicating with us. This will be used for your User ID.

Log in details and security questions

Your User ID will be pre-populated from the email address you entered under the 'Individual details' section:

Individual details

Title *

First name *

Surname *

Business phone number *

Business mobile number

Business email address *

Re-enter business email address *

The next screen will confirm that the registration on the system is complete.

Once you have submitted your registration you will receive an email confirming we have received your request. You will receive a further email within 48 hours which will confirm we have approved your registration. You will then be able to start submitting your applications.

Logon details & security questions

User ID *

Your password must be a minimum length of twelve characters, including at least one number, one special character (please do not use ~ £ % & < > | and both upper and lower case letters.

Password *

Confirm password *

Please provide answers to the following questions. The answers to these questions will be used to verify your identity.

Place of birth *

First school *

Mother's maiden name *

Your memorable word must be a minimum length of 8 characters and contain only letters (a-z)

Memorable word *

Memorable word hint *

How to log in to the Intermediary portal

Go to **wbfi.co.uk** to log in to the Intermediary portal:

Login Details

User name *

Password *

Login

[Forgotten password >](#)

Forgotten password

This link will allow you to reset your password. We will send you an email with a temporary password, which will also prompt you to change your password.

Once the user name and password have been entered, the 'Memorable word' screen will be displayed:

Login Details

To complete your login, please enter the requested characters of your memorable word and click 'Login'.

Memorable word * 1st 8th 6th

Cancel **Login**

[Forgotten memorable word >](#)

Memorable word

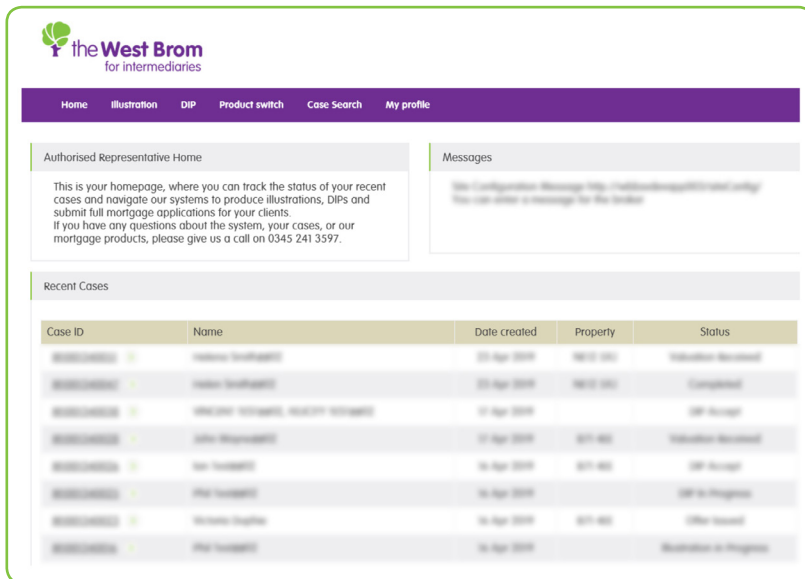
You will need to input 3 characters from your 'Memorable word' to complete your log in process.

Forgotten memorable word

If you have forgotten your 'Memorable word', click on this link. We will send you an email with the 'hint' you set up at registration. Your 'Memorable word' cannot be reset through the Intermediary portal. You will need to contact the Intermediary Sales and Support team on **0345 241 3597** or email **ist@wesbrom.co.uk**

Navigating the homepage

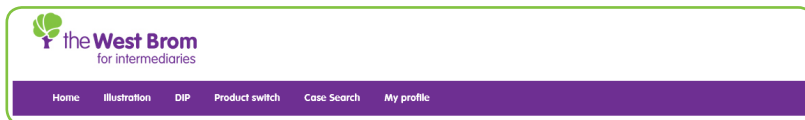
When you have successfully logged into the Intermediary portal you will see your homepage. You will now be able to produce an Illustration or Decision In Principle (DIP) as well as search for your cases:



The screenshot shows the West Brom Intermediary portal homepage. At the top left is the logo for 'the West Brom for intermediaries'. Below the logo is a purple navigation bar with links for Home, Illustration, DIP, Product switch, Case Search, and My profile. The main content area is divided into three sections: 'Authorised Representative Home', 'Messages', and 'Recent Cases'. The 'Authorised Representative Home' section contains a welcome message and contact information. The 'Messages' section shows a configuration message. The 'Recent Cases' section displays a table of recent cases.

Case ID	Name	Date created	Property	Status
123456789	John Smith	15 Apr 2018	1234 567	Illustration Requested
123456789	John Smith	15 Apr 2018	1234 567	Completed
123456789	John Smith	15 Apr 2018	1234 567	DIP Request
123456789	John Smith	15 Apr 2018	1234 567	Illustration Requested
123456789	John Smith	15 Apr 2018	1234 567	DIP Request
123456789	John Smith	15 Apr 2018	1234 567	DIP In Progress
123456789	John Smith	15 Apr 2018	1234 567	DIP Request
123456789	John Smith	15 Apr 2018	1234 567	Illustration In Progress

You will also be able to navigate around the system using the links shown below:



The screenshot shows the West Brom Intermediary portal navigation bar. It features the logo for 'the West Brom for intermediaries' on the left and a purple navigation bar with links for Home, Illustration, DIP, Product switch, Case Search, and My profile on the right.

How to manage your profile

To make changes simply select 'My profile' from the navigation bar. Here you are able to make the following changes to your profile:

- Change your password
- Change your correspondence address
- Change your contact details
- Change your submission route (in the event of a Mortgage Club being used).

Any other changes must be completed on your behalf by contacting the Intermediary Sales and Support team on **0345 241 3597** or emailing **ist@westbrom.co.uk**

What do you want to do?

Change my password Change my address details

Change my contact details Change my submission route list

Change password

Old password *

New password *

Confirm new password *

Your password must be a minimum length of twelve characters, including at least one number, one special character (please do not use – £ % & < >) and both upper and lower case letters.

What do you want to do?

Change my password
 Change my address details

Change my contact details
 Change my submission route list

Your branch/office correspondence address

Existing location
 New location

Greater London
 London & Country Mortgages Ltd, 2nd Floor, 200 Tottenham Court Road, London W1P 0LP, United Kingdom

Confirm password to complete the change *

If the new address is an 'Existing location', please highlight the address.

What do you want to do?

Change my password
 Change my address details

Change my contact details
 Change my submission route list

Change contact details

Business phone number *

Business mobile number

Business email address:

To change your email address please contact us on 0345 241 3597. Our opening hours are 9am – 5pm Monday to Friday.

Confirm password to complete the change *

What do you want to do?

Change my password

Change my address details

Change my contact details

Change my submission route list

Change my submission route list

Any mortgage club added into your list will be available for selection as part of an Illustration and DIP. Your company must be a member of this mortgage club.

Select mortgage club:

Mortgage Club 2
Mortgage Club 3

Mortgage Club 1

Confirm password to complete the change *

To change your submission route list, you will need to highlight the Mortgage Club and click on the arrow button to transfer the Club to your preferred list.

The screen will display 'Your details have been updated' and you will receive an email to confirm that your registration details with West Brom for intermediaries have been changed.



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