


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. To register simply visit www.wbfi.co.uk and click 'Not yet registered' and follow the instructions. Alternatively, contact our Intermediary Sales and Support team on **0345 241 3597** or **ist@westbrom.co.uk**.



Company registration

Your company FCA register number *

Find Details

Cancel

Next

Enter your FCA firm reference number (FRN). The details will be validated and the Company details and correspondence address will be displayed

Company registration

Your company FCA register number *

140192

Find Details

Company details

Consumer credit licence number

Registered company name

Sequence UK Limited

Company address

Cumbria House, 16-20 Rockcliffe Street, Loughlin Buzzard, Bedfordshire, LU7 1GN

Company authorised status

Appointed Representative

Your branch/office correspondence address

Existing location

New location

Cumbria House 16-20 Rockcliffe Street Loughlin Buzzard Bedfordshire LU7 1GN

William in Brown 25 Goad Street Rotherham Siroe S.S. United Kingdom

Jones & Chapman, 42, Grosvenor Road, Bournemouth BH2 1AQ, United Kingdom

Sequence Mortgage Business SMI, Lombard House, Loughlin Road, Loughlin Buzzard LU7 1GN United Kingdom

Cancel

Next

2

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

Lombard House 16, 20 Grosvenor Street, London, England, EC2A 3DF, UK
William & Brown, 28 Gold Street, London, EC2A 3DF, United Kingdom
Jones & Chapman, 142, Grosvenor Road, London, EC2A 3DF, United Kingdom
Seamless Mortgage Business Ltd, Lombard House, London, England, EC2A 3DF, UK, United Kingdom

⏪

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 *

4

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**

5

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:



Home

Illustration

DIP

Product switch

Case Search

My profile

Authorised Representative Home

This is your homepage, where you can track the status of your recent cases and navigate our systems to produce illustrations, DIPs and submit full mortgage applications for your clients.

If you have any questions about the system, your cases, or our mortgage products, please give us a call on 0345 241 3597.

Messages


[View Configuration Message](#) [Help](#) [Feedback](#) [Feedback](#) [Feedback](#)

You can enter a message for the broker

Recent Cases

Case ID	Name	Date created	Property	Status
WESTBRO000001	Andrew Thompson	22-Apr-2018	140-12-100	Illustration Received
WESTBRO000002	Andrew Thompson	22-Apr-2018	140-12-100	Completed
WESTBRO000003	Andrew Thompson, Andrew Thompson	22-Apr-2018		DIP Received
WESTBRO000004	John Thompson	22-Apr-2018	140-12-100	Illustration Received
WESTBRO000005	John Thompson	22-Apr-2018	140-12-100	DIP Received
WESTBRO000006	John Thompson	22-Apr-2018		DIP In Progress
WESTBRO000007	Andrew Thompson	22-Apr-2018	140-12-100	Offer Issued
WESTBRO000008	John Thompson	22-Apr-2018		Illustration In Progress

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



Home

Illustration

DIP

Product switch

Case Search

My profile

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.

Cancel

OK

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

Beaver House, Lower Bristol Road, Bath, BA2 3BA
London & County Mortgage Ltd, Beale House, All Saints Business Centre, Newcastle Upon Tyne, NE1 3LS, United Kingdom

Confirm password to complete the change *

Cancel

OK

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 *

Cancel

OK

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

➡

⬅

My submission route list

Mortgage Club 1

Confirm password to complete the change *

Cancel

OK

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.

9



Intermediary Sales and Support team
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www.westbrom.co.uk

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