Registration & Logging In

Check your browser settings

Before we begin, note you will require Firefox,Google Chrome o r alternatively Internet Explorer (IE) 11 otherwise the system will not to work properly.

If using Internet Explorer you will need to check what version of browser you are currently using. When opening internet explorer click on the settings button and select 'About Internet Explorer'

This will confirm which version of IE you have. If you need to upgrade this, simply search through your preferred search engine 'Internet Explorer 11' and you should be able to download this from there.
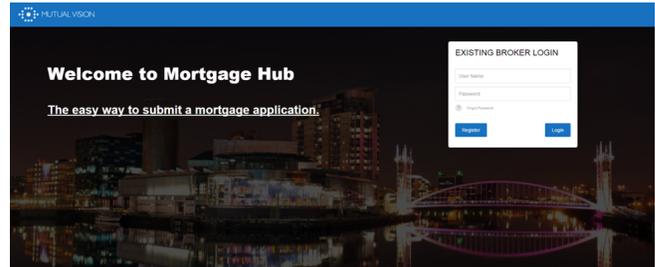

Registration

Once you have received the URL for broker online paste this into your browser and it will bring you to the login page.

The first thing you will need to do is register. To do this simply select 'Register', Select 'New Registration' and click 'Next'.

You will then be required to enter your details.

Enter your Email address, Title, Full Name and Job Title and then choose a password.

Next, you will be asked to enter the details of the organisation you belong to.

The first field on the Organisation Details page (within the registration) asks for the FCA number.

Depending on whether that FCA number has been registered previously or not will trigger two different outcomes.

1. If the FCA number is unique, the details entered in this section will be stored and saved as a new organisation, the broker will then be added as the first member to this organisation. Other brokers will then be able to join it automatically by entering the matching FCA number.
2. If the FCA number entered matches one already registered in the system, the broker will be added to the list of brokers for that organisation.

Once a broker and organisation pair has been set up, a super user can be created.

Once registered as a default the broker will be set to pending.This is so new brokers can be approved by the admin user before they are able to submit applications. It may be the case that the admin user would rather this responsibility lie with the organisation.
This is done my modifying the broker in the admin system.and turning the super user switch to YES.
Once this is done the super user will work as the admin for that organisation, and will be responsible for activating new broker in the organisation.

The last two items asked for on the organisation details page are SELECT NETWORK and SELECT MORTGAGE.
For networks the broker is able to choose one from a dropdown list.
For mortgage clubs clicking in the box will bring up a list of mortgage clubs. The broker can then choose multiple clubs.

For a Network or club to show for a broker, it needs to first be added into the admin system.
Also once the broker has registered they are no longer able to change network or add to their list of mortgage clubs.

If needed this can be done by the admin user.

Once you are happy the information entered is correct, select 'Create Account'.

Once your account has been created you will be logged into the system straight away.

It is worth noting you will not be able to submit any applications until the society have approved your Online Broker Registration. You can enter client/application details but will not be able to **submit** until approval has been confirmed. You will receive an email confirming when this has been done.

The acceptation to this rule is with straight through registration. Having this feature switched on in the admin system will enable brokers to submit applications as soon as they register, without an admin user having to approve their registration.

After registering, to log in and out all you need to do is enter your user name and password on the homepage *Hint: Your user name is your email address.*