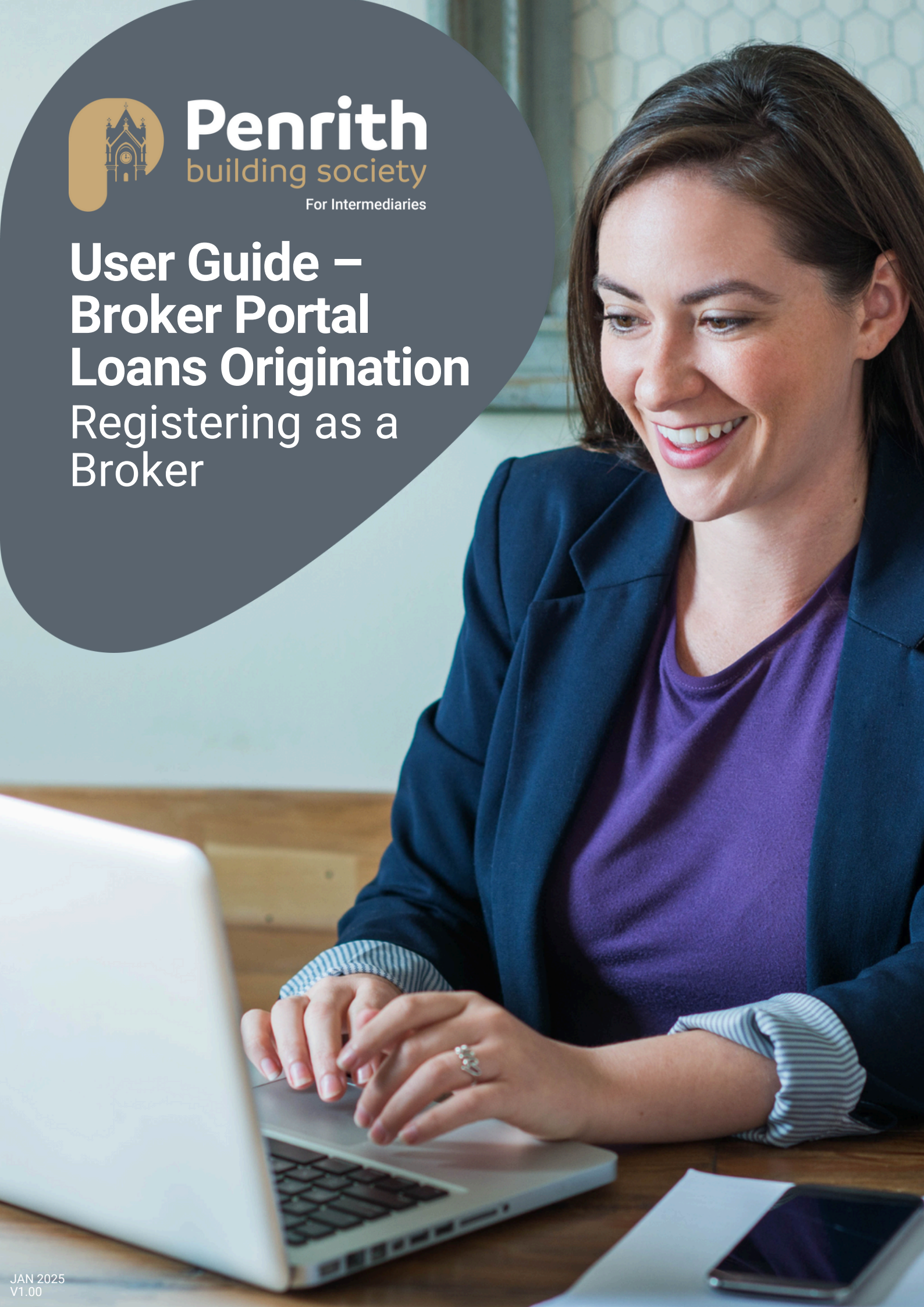# Penrith building society
For Intermediaries

User Guide – Broker Portal Loans Origination
Registering as a Broker

Contents

User Guide Information

This user guide will explain how to register as a Broker using the Penrith Building Society Broker Portal - Loans Origination system. The guide is designed to be a step-by-step best practice guide.

For further support or guidance on any of the information contained in this guide please contact mortgages@penrithbs.co.uk

What is this?

This is your efficient and easy to use platform for submitting loan applications. It is designed to speed up the application process and help you to manage your loans pipeline quickly and easily. You may use this to help start cases, add clients, choose products, process full mortgage applications and create ESIS documents.

As you work through each of the user guides in this series, you will build your knowledge around the different ways that Loans Origination can support you.

Each guide is designed to be a 'best practice' process guide which you can use in conjunction with other resources.

You must be registered with Penrith Building Society before you can log in to your account. For support registering as a Broker, please contact our BDM or our Head Office for further information.

Once your registration is complete, you can then log in to access your account.

Registering as a broker is a quick and easy process. You can use this guide to help with the set-up process for a new broker, OR to help with re-registering an account that was used on previous versions of the system.

In this guide you will learn how to:

- Register as a New Broker

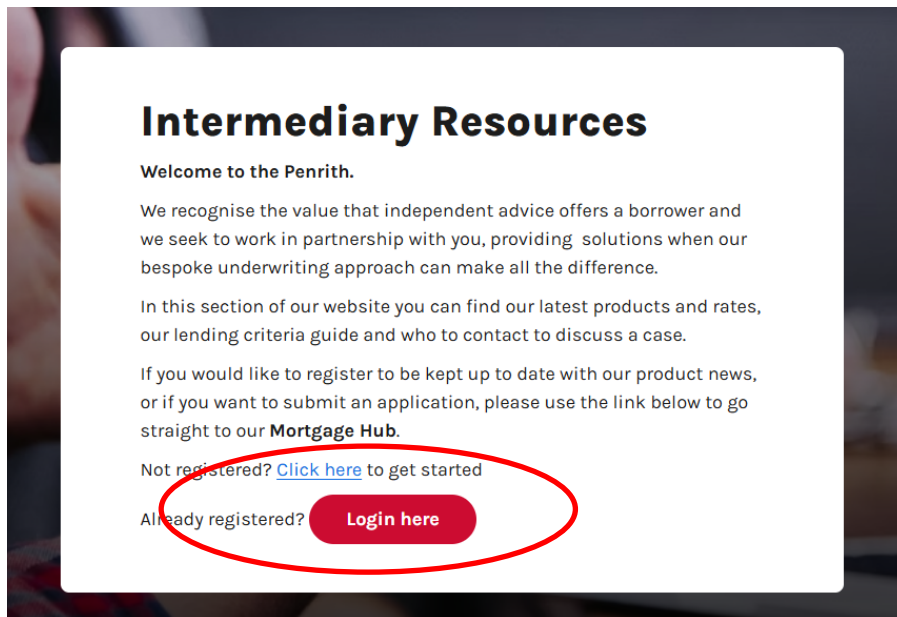- Re-Register as a Broker for Loans Origination

New Brokers

Sign Up

To register as a new broker, you will need to access the URL.

Access the Penrith Building Society website   <u>Home - Penrith Building Society</u>
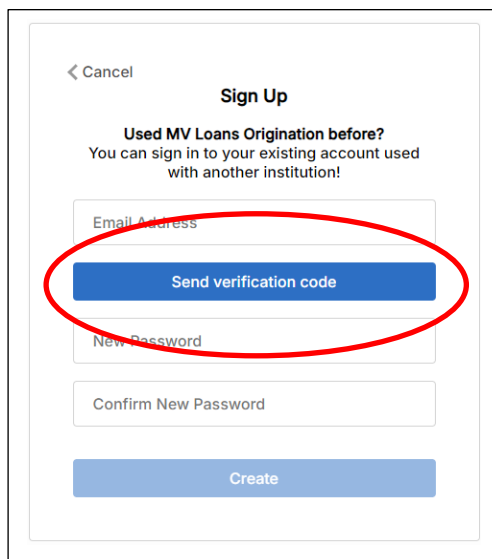
Click here to get started or login here

Enter your email address
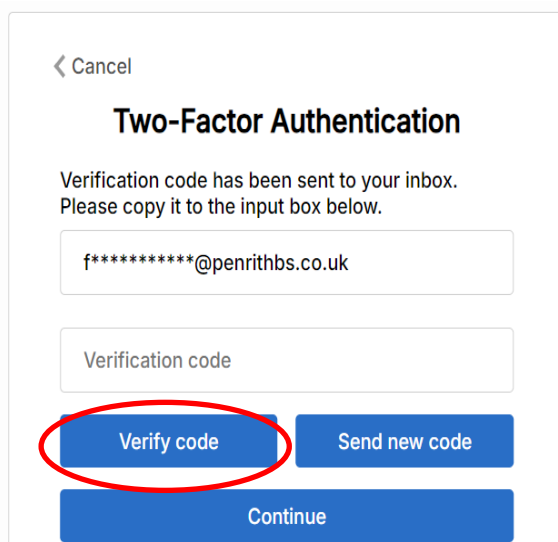
Click '**Send Verification Code**'

A verification code will then be sent to the email address you have entered above to make sure it is valid. The email may take a few minutes to arrive. Please also check your Spam folder. You need to enter the code sent in the email into the relevant box.

Enter the code in the Verification code box

Click '**Verify Code**'

You then need to enter in a password you will use to access the site moving forward. Once entered and confirmed click Create

Click Send verification code, a second code will then be emailed to you.

Enter your second verification code

Your account has now been verified, click Continue
You will then need to add in some details to create your account.

Creating an Account

To create an account, you will need to enter your details including:

- Title

- First Name

- Surname

- Job Title

- Mobile Number

- Marketing Preferences

Click **Continue**

You will also need to enter in detail about your Company, including:

- Regulated status

- Organisation Name

- Address Details

Click **Continue**

You will then see a Summary of the details you have just entered.

Check the details are correct Click **Register**

Create an account

Personal Details	⌄
Company Details	⌄
Summary	⌃

Personal Details

Mr Mickey Mouse

Financial Adviser

0788888888

Company Details

123456

7

KING STREET PENRITH

CA11 7AR

✏ Edit   ✏ Edit

Register

Cancel

Your account set up is now complete. You will have to wait for us to check your credentials before you can log in and submit any applications. For information on your set up, please contact our BDM or our intermediaries team intermediaries@penrithbs.co.uk.

Once your registration is approved you will be able to log in using the credentials you created when registering.

You will then be brought through to your '**Cases**' home screen and can begin to submit applications.
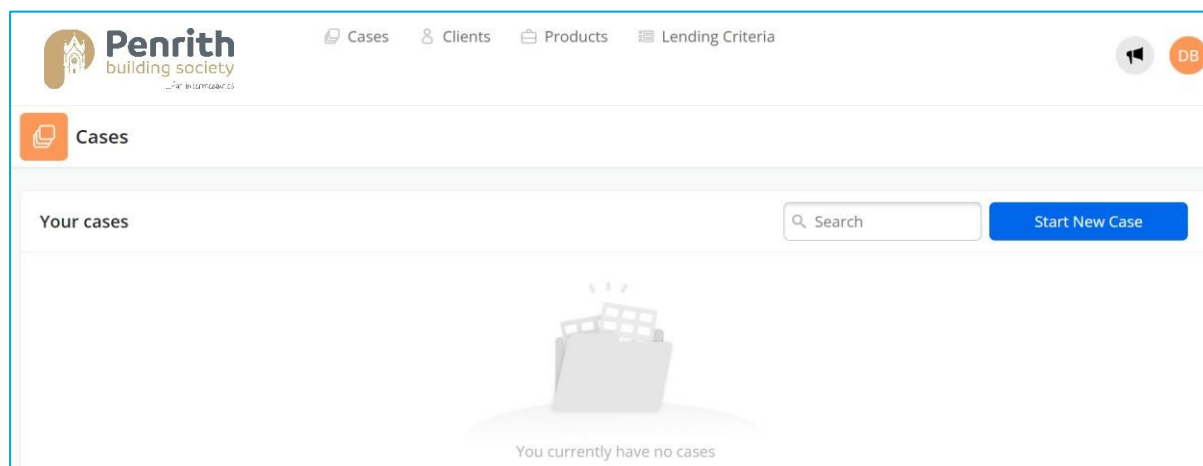
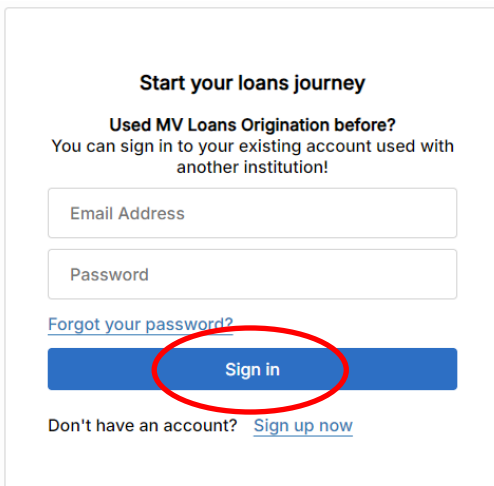

Re-Registering from Earlier Versions

What is this?

You may already have an account which you used to log in to submit cases the previous version of our Broker Portal. Your account will still be valid but will need to be transferred across to the new system version.
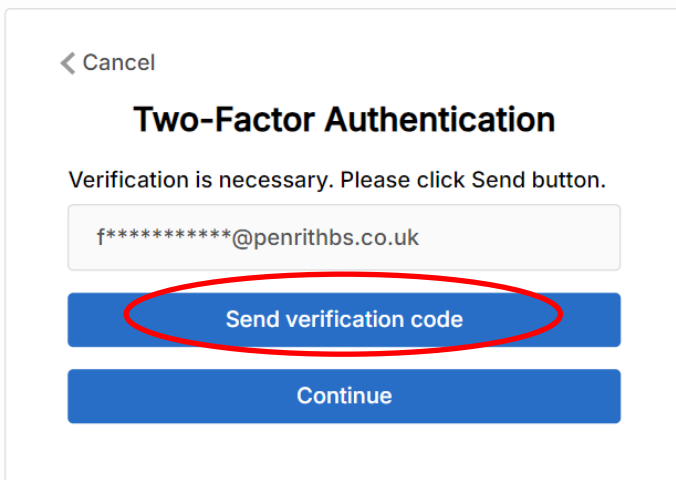
Re-Registering
To do this:

Access your Loans Origination page [Intermediaries Support - Penrith Building Society](#) enter your email address and password
in the relevant boxes

Click '**Sign In**'

You will then need to enter a 2 factor authentication code sent to your email address to access your account.

Click '**Send Verification Code**'

An email will then be sent to your registered email address with the code you need to enter.
Check your email for verification code.

Microsoft on beha... Loans Origination account email verification code	Tue 14/01/2025
CAUTION: This email originated from outside of the Society. Do not click links or open attachments unless you recognise the sender and know the content is safe. Verify your email address	

Enter the code in the Verification code box, click '**Verify Code**'

The system will then check to see if your email address is associated with any other accounts on this system version.

Already Registered?

If it is, you will be classified as already registered. This means you will be re-directed to the 'Cases' screen and begin to set up your clients and submit applications.

Not Registered?

If you have not yet registered you will be directed to the portal to enter in your personal details, company information and regulated status. See section above.