

Loans Origination 3.4 - Broker Registration

When signing up as a new or existing introducer, you will have to register for a Microsoft Azure account to be able to access the portal. This will only need to be done once. 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. Both processes are very similar, but once you have registered, you will be able to log in with your email address and password to submit new cases to us.

New Registrations

If you did not have an active account on previous versions of the portal, you will need to click 'sign up now'. You will then be asked to insert your email address, create a password and confirm the password. You will also be sent a verification code to your email address. You may then be asked for one more verification code once your password is confirmed. You will then be able to proceed with your registration and input your company and personal details (Name, Job Title, FCA number etc). Once Terms and Conditions are confirmed, you will be taken to the main screen where you can start creating a new case/client. Registration is instant, we just cross-reference your FCA number to the FCA Register when a case is submitted to us.

Re-Registering from an earlier version

If you already have an account or you have previously submitted cases to the Beverley previously, you will just need to 're-activate' your account so it is compatible with the new system. Similar to the registration for new introducers, you will need to click 'sign up now'. You will then be asked to insert your email address and a verification code. Once your account is verified, you may be asked to change your password before you can proceed to the 'cases' screen. The only difference between re-registering and a new registration is that existing registrations will not need to insert company details again, including office address, FCA number, marketing preferences etc.

If you have any trouble with the registration process, please follow the above instructions carefully before calling the office on 01482 881510. Please press 1 for the Mortgage Team.