

Welcome to our new Intermediary Portal

Our new portal provides you with the ability to manage your online business with Progressive in one place including submitting applications, obtaining a Decision in Principle, and submitting Product Switches. The new portal replaces our existing one.

The portal provides you with an improved user experience and a new look and feel, making it easier for you to navigate the system and submit your business to the Society.

The portal comes with several improvements which we have outlined in this guide, such as increased security features to protect your and your client's data and new functionality such as the ability to create a login for your administrators. You can complete all your online business in one place and your clients can login and view their mortgage online.



How to register for our new portal

If you are already an existing Intermediary panel member, please complete the steps below to register for our new portal:

1. Contact your local branch, telling them that you'd like to register
2. We'll send you an email inviting you to register
3. Visit the URL in your email within 7 days of receiving it and have your email address and mobile phone number to hand.

To help you, we have put together the below user guides on Registration and Logging in.

[Registration Guide for our new portal](#)

[Logging in guide for our new portal](#)

Not on our Intermediary panel?

If you are not yet a member of our Intermediary panel, you can apply to join [here](#). Please note, Progressive Building Society only lends on properties within Northern Ireland therefore we only deal with Intermediaries located in this area.



What's different about the new portal?

The new portal is a replacement of our existing portal, therefore how you submit applications and DIPs, for example, remains the same. The portal has multiple **new** features, which we have outlined below.

Logging in securely with two-factor authentication

Keeping your personal information safe is our priority. So that we know it's really you, we will ask you to login to our online service using two steps (two-factor authentication). When you login for the first time, you will be prompted to download the Salesforce Authenticator app onto your smartphone.

Each time you login, you'll need to use the authenticator app, so please keep it on your phone. The app will look like the image on the right. When you download the app, you'll be asked to activate it, add an account, and link it to your Progressive online profile. Further guidance on how to download and use the app can be found [in this guide](#).



You can create a login for your administrator

By creating a login for your administrator, they can use the portal to view and complete your applications. You can add an administrator when you are registering for the new portal or come back and add one later, by clicking "My Profile".

Improved application tracking

Our new portal allows you to see the progress of all your applications from application to completion.

Submitting product switches online

If your client already has a mortgage with Progressive and is within 12 weeks of their existing mortgage product ending, it's easy to switch online on their behalf. When you login to the online portal, you'll be able to search for your clients who are eligible to switch. If you are unable to locate your client, please contact the branch office, as the case may not be eligible for an online product switch and can be easily processed by the branch. We'll write to your client approximately 8 weeks before their product is due to end, outlining the options available to them. Further information on eligibility for online product switches can be found [here](#).

Save draft versions of your applications and finish off later

Our new portal enables you to start an application, save it, and return to it later. Remember, our mortgage package changes regularly, so be sure to submit any applications for products before they expire. We'll get in touch with you via email a few days before our mortgage package is due to change.

Cloning Illustrations and Applications

In our new portal, you can clone illustrations in order to compare different products. You can also clone existing applications if you need to make an important change, such as changing the address of the new home. If it's a smaller change, such as editing the solicitor details, you can contact your local branch about that.

View your recent applications in one place

On our new portal homepage, you'll be able to view the recent applications you have submitted. You can also search for your client's application.

Your client can login and see their mortgage documents

When you successfully submit your client's application, we will contact your client directly via email or letter, confirming that we have received their application and inviting them to register online. Once registered, they can login and view their mortgage documentation and pay any fees. The following documents are available online for your client:

- Your client's Mortgage Illustration
- The Society's tariff of charges
- Our Mortgage Conditions

Your client can pay their fees online

If your client's mortgage comes with fees (for example valuation fees or product fees), your client can login and pay these online. Before paying online, your client must register for our online service. Fees can also be paid by contacting our branches.



A message from our Operations Director, Declan Moore



“The launch of our new portal demonstrates our continued investment in providing you with excellent service. Our Intermediaries are a vital element of our business at Progressive.

We value your support, and as such we have invested heavily in industry leading software to create a new intermediary portal to help us to improve your experience when dealing with us.

It’s important for us that our intermediaries can search, apply, and track cases with the Society in a way which is straight-forward and intuitive. The features we’ve added to our new intermediary portal are designed with you and your clients at the forefront of our minds.

Our branch managers and mortgage support teams will continue to support you, building on the existing relationships you have with our local teams. We have incorporated feedback that we have received from you into the new portal. Our new portal offers many new features and benefits including the ability to submit product switches online, allows you to add an Administrator to help you process new business with us, and enables your clients to pay mortgage fees online.

We hope that you have a positive experience using our new portal and we welcome any feedback you have. If you need assistance, please contact your local branch manager or our online support team, details of which can be found overleaf.”

We’re here to help

For technical support, please call our Online Support Team on 0800 0294 997 (telephone opening times can be found [here](#))

To discuss joining our panel, placing business, or anything else, please contact your local branch.

Ballymena branch

Wendy McClintock 028 9127 0348
wendy.mcclintock@theprogressive.com

Bangor branch

Kerry McDougall 028 9127 0348
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