

How to Add an Administrator

For Intermediary use only



PROGRESSIVE
BUILDING SOCIETY

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About this Guide

This guide will provide you with an overview of how to add an administrator via the broker portal.

If you need any help adding an administrator or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place Belfast BT1 6HH.

What is an Administrator?

- An administrator is someone who works within a broker's firm or company that can submit businesses on their behalf.
- A broker can add an administrator via two methods:
 - During **Registration**
 - Via the **Broker Profile**

How to Add an Administrator – Registration

A broker can add the administrators details on step 5 and once registered, the administrator will receive an email/link for them to register themselves.

Registration – Step 5

5. You have the option of creating a login for an administrator. If you'd like to do so, please enter their details, click the blue slider at the bottom, and click "Next". If you don't wish to add an administrator, leave all fields blank and ensure the blue slider is deselected. Click "Next". You can add an administrator at a later date.

Registration
Home / Registration

1 Consent 2 Personal Details 3 Verify Details 4 Administrator 5 Registered

For security purposes, Progressive Building Society strongly recommends that you never share your login credentials with anyone.

You can now set an administrator who will have access to the Progressive Online Service on your behalf. Your administrator will be able to see all your applications on our Online Service and submit new cases on your behalf. This is optional. You can add or change your administrator details at any point.

If your administrator is already registered to the Progressive Building Society portal, they will be able to act on your behalf using their current login credentials. If your administrator doesn't currently have access to the Progressive Building Society portal, they will get an email asking them to set their initial password.

Your Administrator First Name Your Administrator Last Name

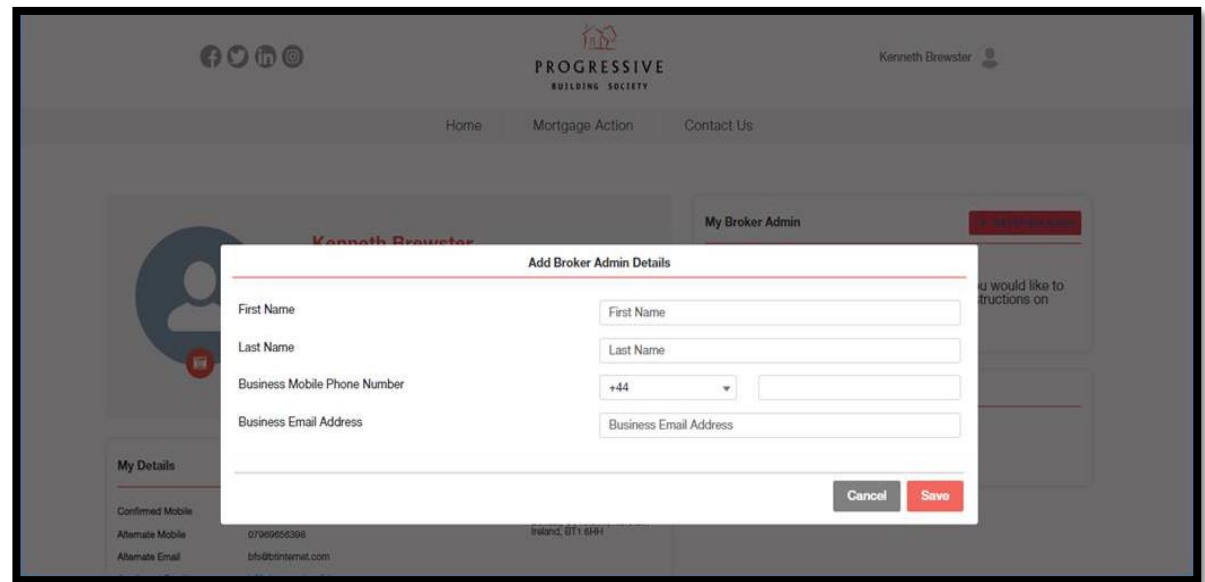
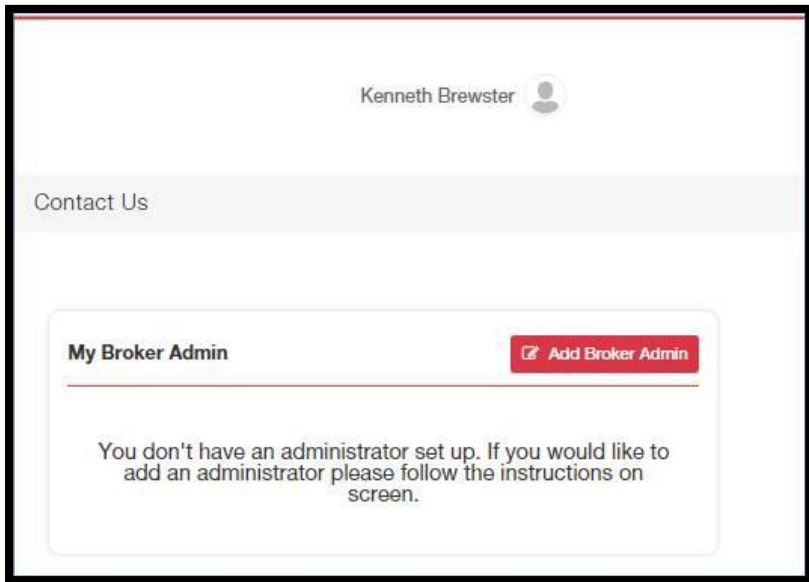
Your Administrator Mobile

Your Administrator Email

Add Administrator to my account

How to Add an Administrator – Broker Profile

The broker may decide to add an administrator at a later date or after registration. They can do so by selecting 'Add Broker Admin' within the Broker Profile page. Similar to above, broker will capture the Administrator details which will trigger an email for them to register and login.





We hope you found this guide helpful and informative.

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