How to log into your account

Issued February 2021

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How to log in

Where is the log in page?

The PUMA for Intermediaries log in page can be accessed by typing **https://puma.htb.co.uk** into your browser. Click on 'Login' which will take you to the 'Login to PUMA' page.

Alternatively, you can type in 'puma htb' in Google or another internet search engine to access **https://puma.htb.co.uk** and click 'Login.

HTB

PUMA for Intermediaries

As a specialist lender with the strength of a bank we offer what others can't. We have the power to help you deliver bespoke and complex funding solutions for your clients. From the innovative product range to the dedicated specialists at each stage, we aim to give you, the intermediary, the confidence your client is in safe hands.

To support you, our PUMA for Intermediaries system allows you to submit applications, upload documents and track your applications through to completion.

Contact HTB's specialist mortgages team on **020 7862 6244** or **email us**. We are open 9am to 5pm Monday to Friday, excluding bank holidays.
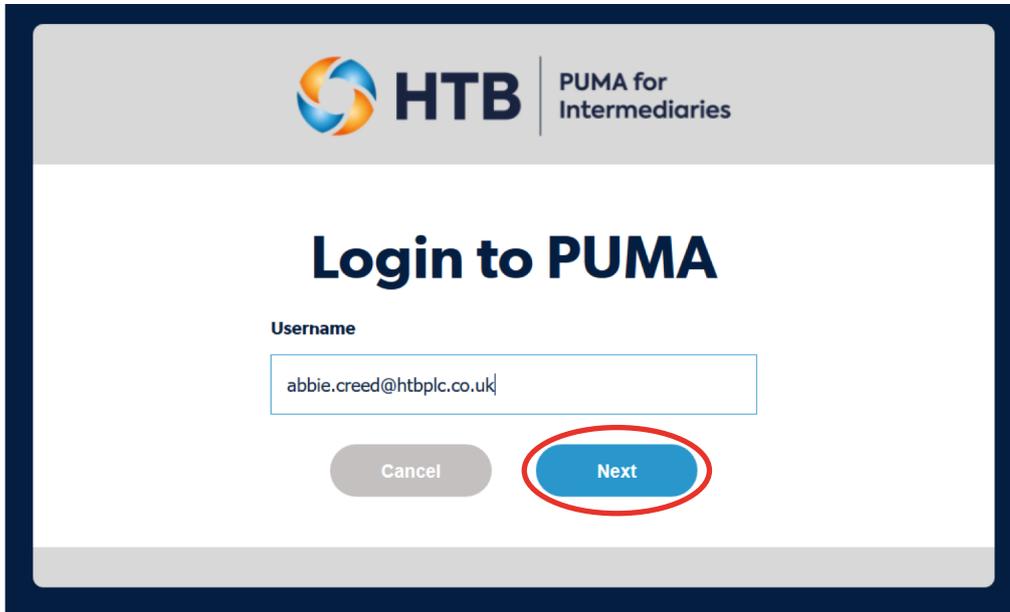
Existing intermediaries

Log in

Having trouble logging in? Please contact us on **020 7862 6244** or **email us**. We are open from 9am to 5pm Monday to Friday excluding bank holidays.
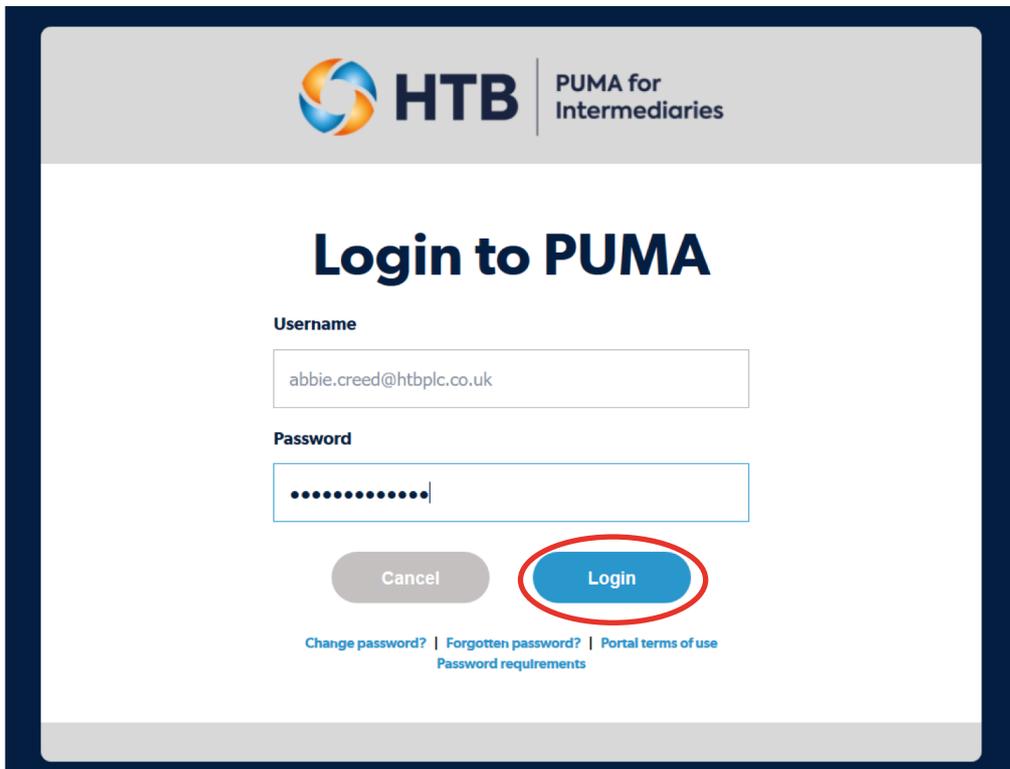
Enter your username

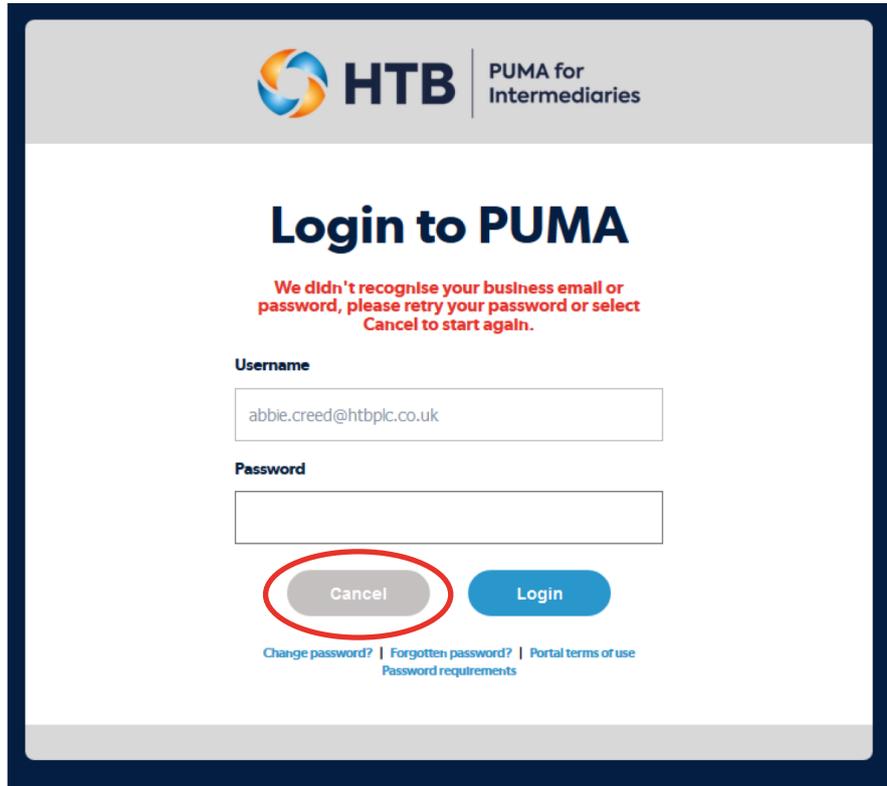Enter the business email that you used to activate your account and click 'Next'.

You can now enter your password and click 'Login'.

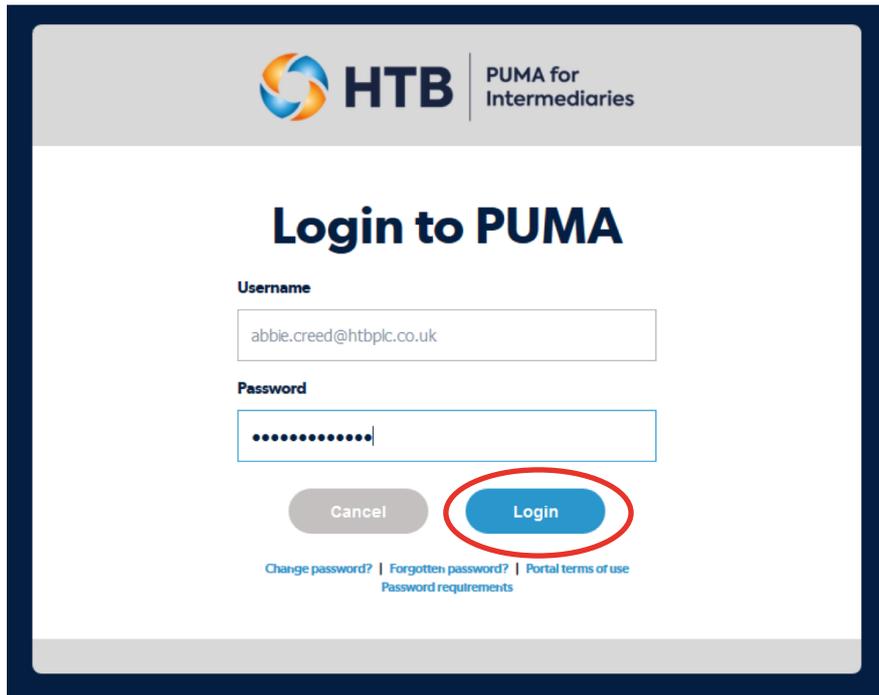We'll display an error message if we don't recognise your business email or your password.

Entered the wrong username?

Check the Username, if you can see that you've entered the wrong username then click on 'Cancel' and start again. Enter your username and click 'Next'.

HTB

Re-enter your password and click 'Login'.

Entered the wrong password?

If you've checked the username and its correct then re-enter your password and click 'Login'.

Login successful

If your username and password is correct, we'll authenticate your account and log you into PUMA for Intermediaries.
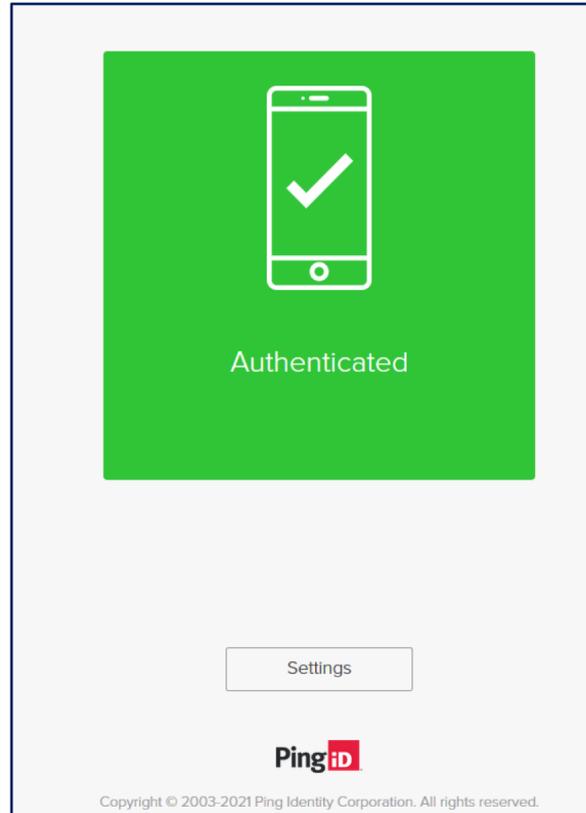
Homepage

Overview

If you have logged in successfully, you'll land on the 'Homepage'.
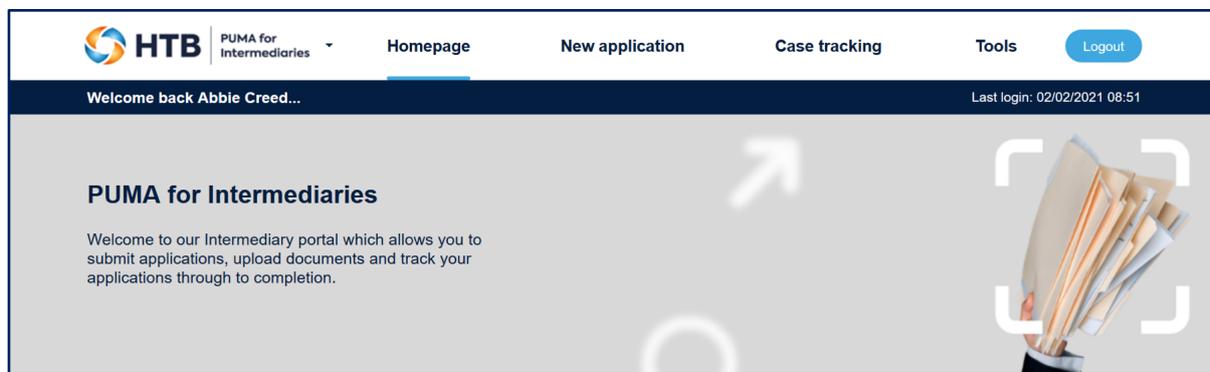
The Homepage provides an overview of your applications and allows you to create a new application, track your case and manage your applications via the top navigation bar.

Here's a summary of the key features, there are more details in the Manage Application user guide:

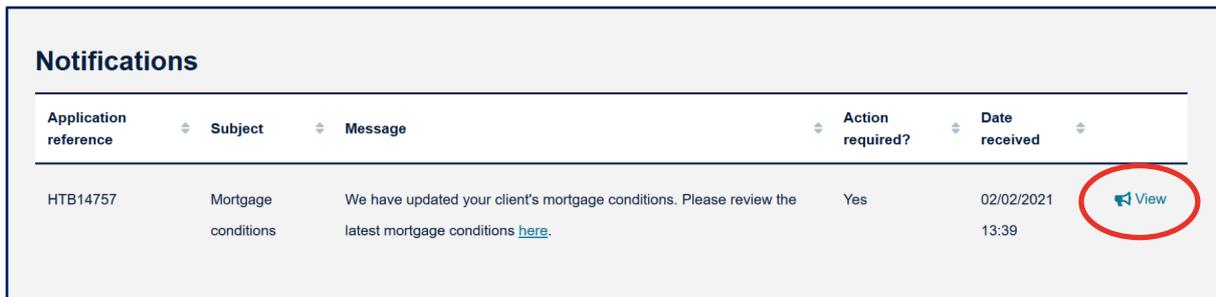|	
New application	This is where you create and submit a mortgage application. We only ask for information once as we've combined our DIP & Full Application forms.
Case tracking	This is where you can search for and update any unsubmitted applications. If you search for a submitted application you can access Case overview to review notifications, conditions and documents.
Tools	This is where you can access and download any templates and supplementary information that is also available on the **htb.co.uk** website.

Cases in progress

On the Homepage, a summary of all your 'Cases in progress' is summarised bay case status.

- The buttons are interactive, click on any of them to provide a list of applications and to view a specific application you can click on the application reference.

Notifications

We'll display all of your notifications on the Homepage, you can click 'View' to see the full notification. If you do this the notification will be removed from the Homepage.
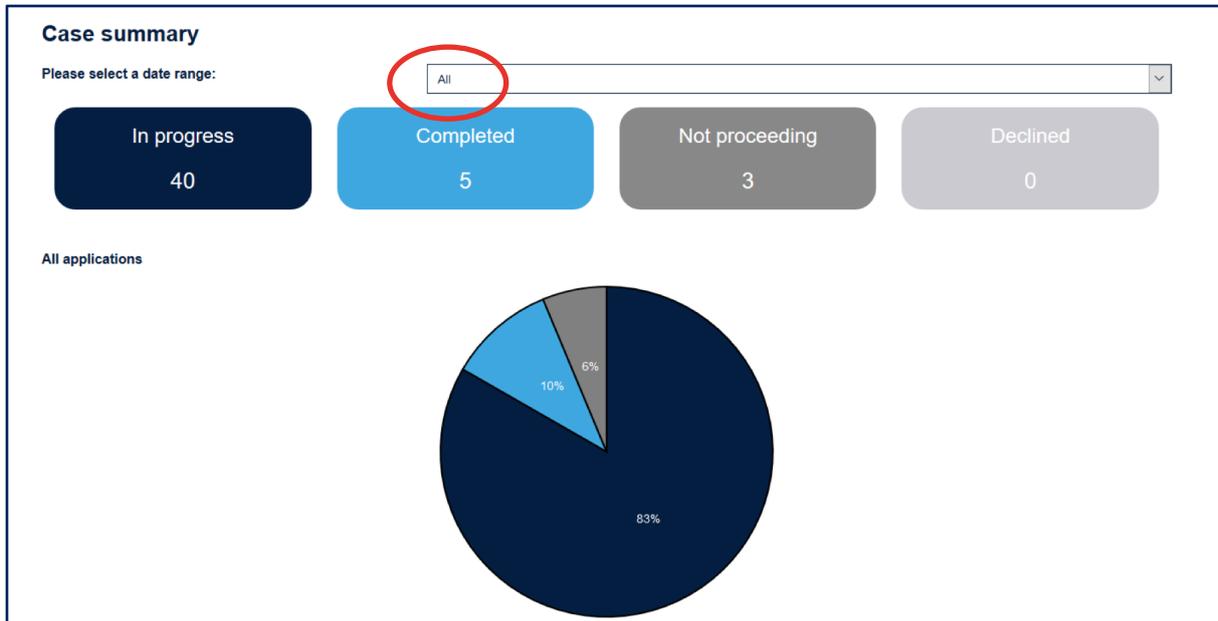

If you want to view the notification again you can do this by searching for your application by clicking Case tracking in the top navigation bar, searching for your application and then clicking 'Notifications' within 'Case overview'

Case summary

You can also view a summary of all your applications via the Homepage.

- You can change the date range that you'd like to see by selecting 3, 6 or 12 months; as a default we display 'All' applications.

How to change your password

Changing your password?

You can change your password during log in, just click 'Change password?' which will take you to the 'Change password' page.

You'll have to enter your current password and then confirm your new password taking care to make sure it meets our minimum password requirements and then click 'Submit'.

Your password does not match

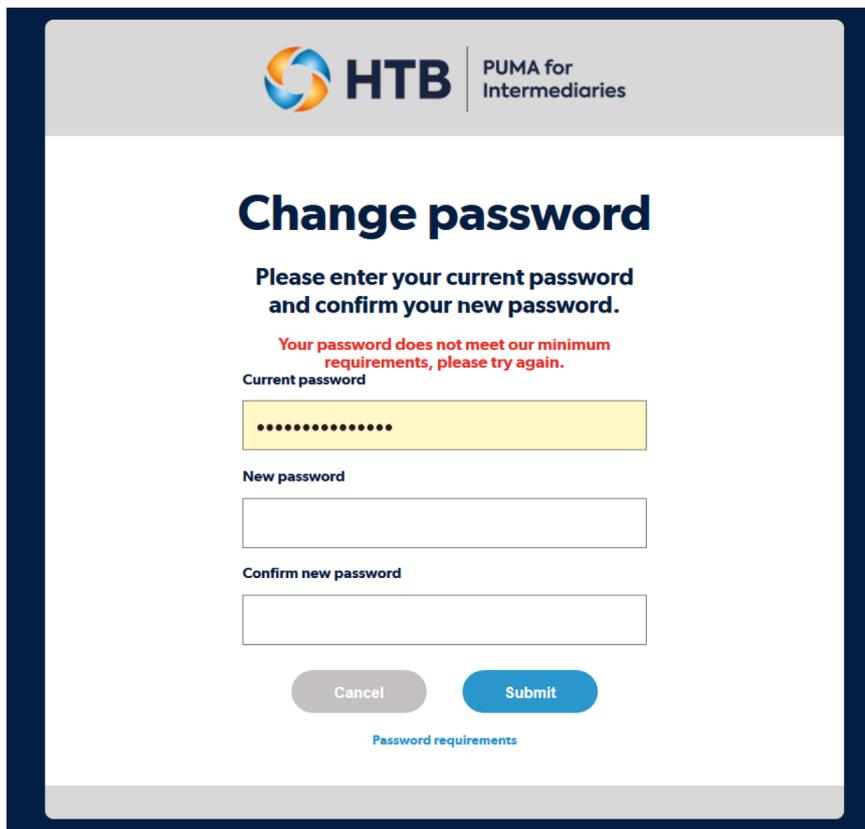We'll display an error message if your password does not match. Please re-enter your password and confirm your new password and click 'Submit'.

Your password does not meet requirements

We'll display an error message if the passwords match but fail the minimum requirements. Please re-enter your password and confirm your password and click 'Submit'

You can click 'Password requirements', which explains 'a password must be a minimum of 12 characters including a mix of uppercase, lowercase, numbers and special characters'.

Trouble
logging in?

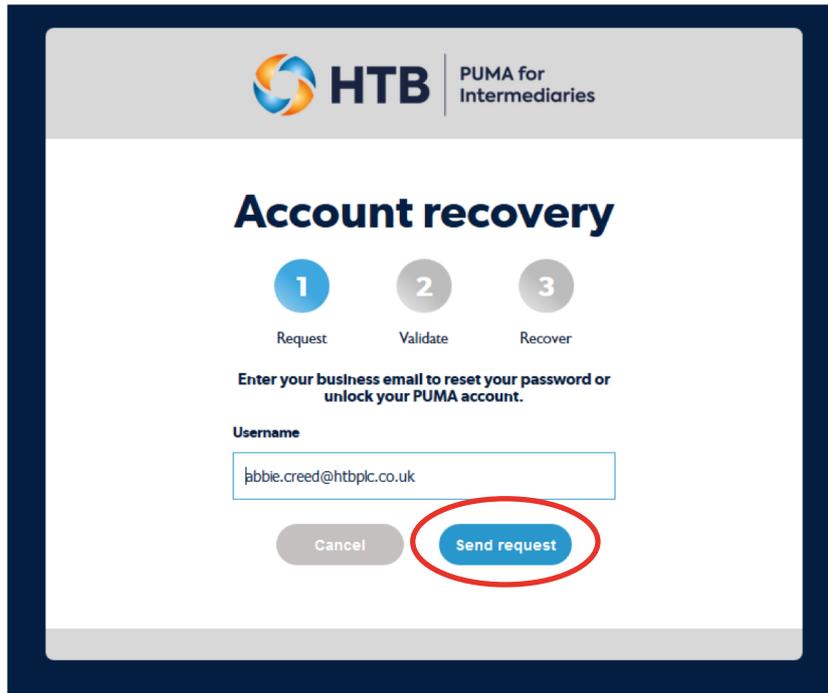## Forgotten your password?

If you can't remember your password you can recover your account by clicking 'Forgotten password'.
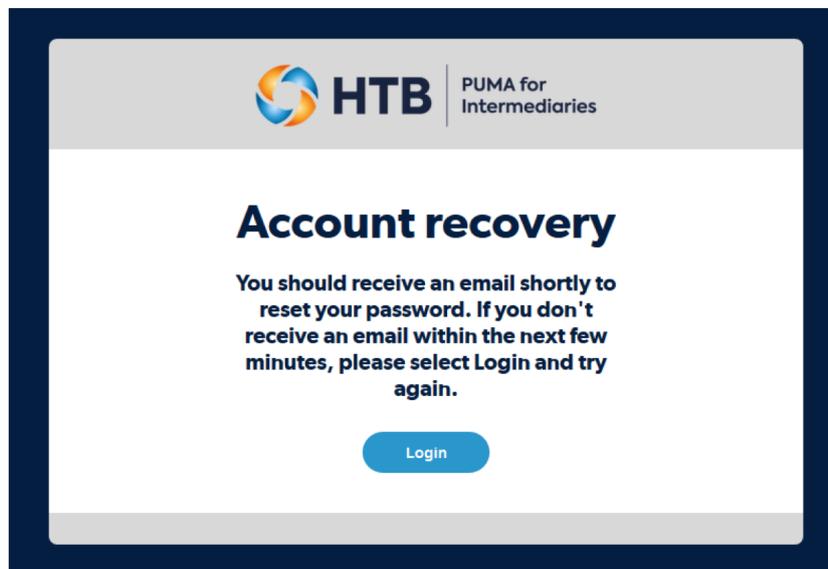
Enter your business email in the Username field and click 'Send request'.

We'll send you an email to reset your password.

Once you have received an email, click 'here' to reset your password.
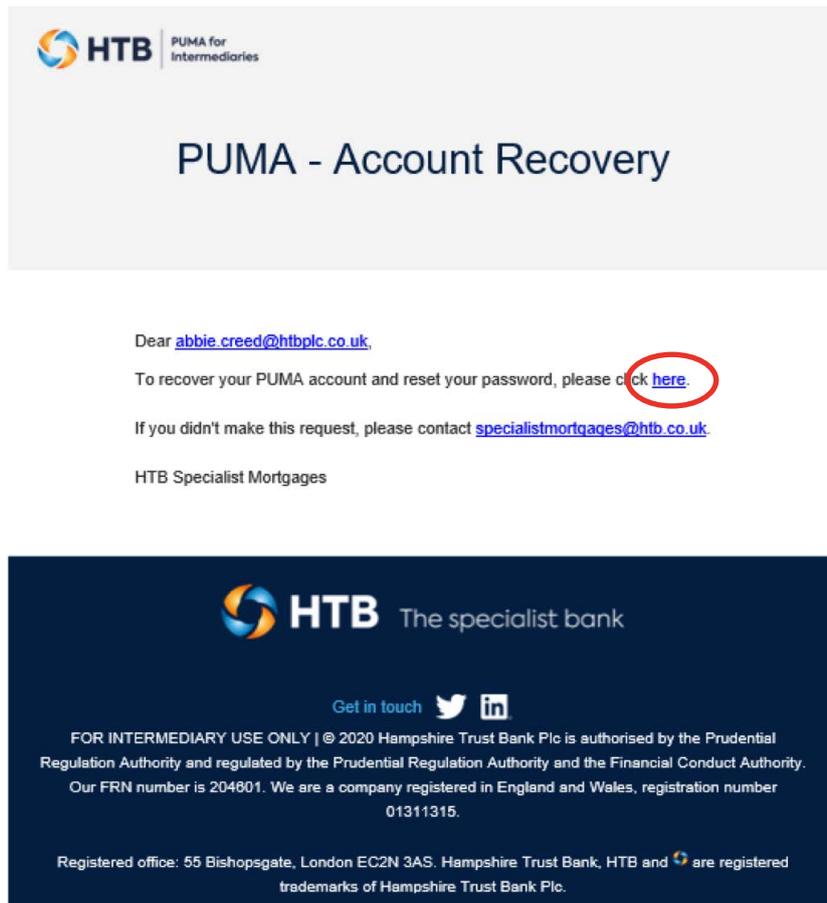
This will take you to the 'Enter your password' page.
Enter your password and then confirm your password taking care to make sure it meets our minimum password requirements and click 'Reset'.

Your password does not match

We'll display an error message if your password does not match. Please re-enter your password and confirm your password and click 'Submit'.

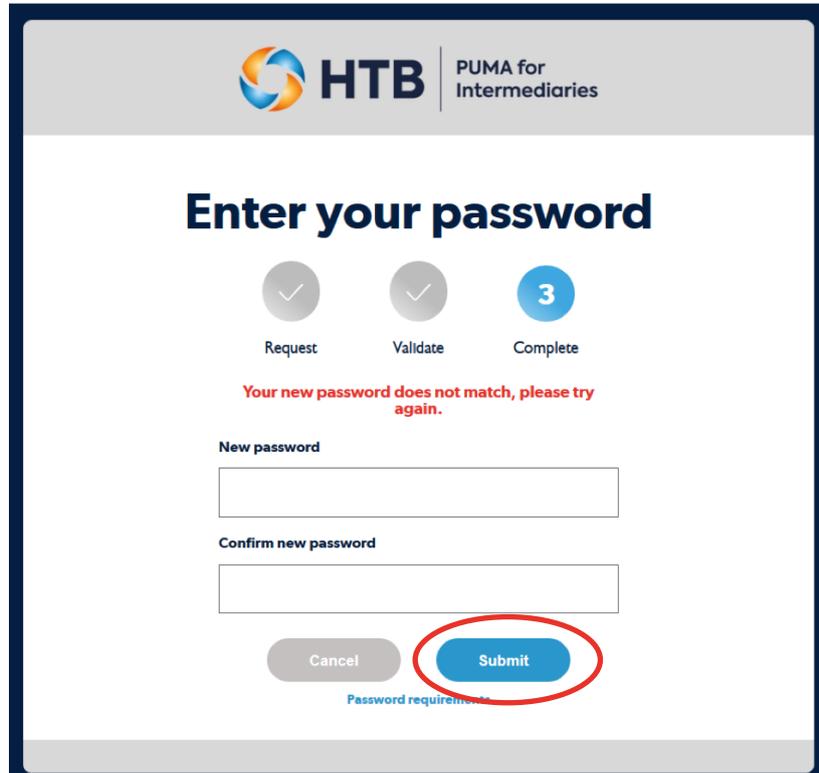## Your password does not meet requirements

We'll display an error message if the passwords match but fail the minimum requirements. Please re-enter your password and confirm your password and click 'Submit'

You can click 'Password requirements', which explains 'a password must be a minimum of 12 characters including a mix of uppercase, lowercase, numbers and special characters'.

My account has been locked

We will display an error message that 'Your account is locked' if you make five failed log in attempts. If you can't remember your password you'll have to wait five minutes before you can use the 'Forgotten password' process to recover your account.
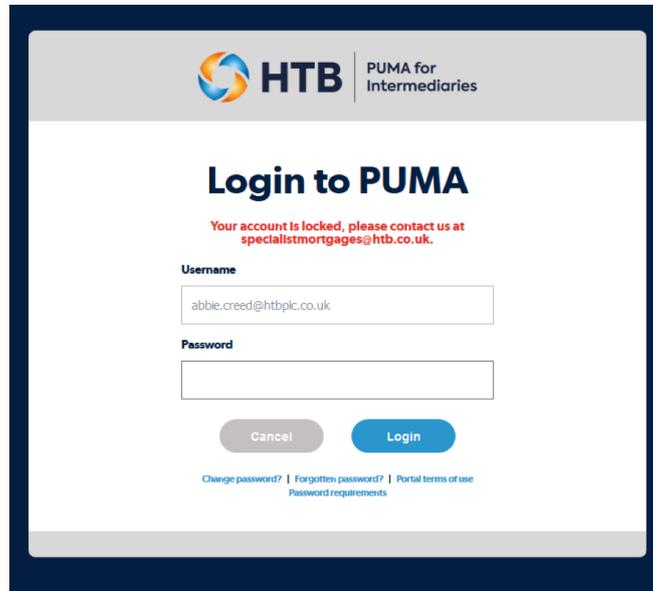
If you are still having trouble in logging in then contact us at **specialistmortgages@htb.co.uk**.

My account has been disabled

If your account has been inactive for 12 months or more, we'll for security reasons disable your account and then after a further six months your account will be deleted. Please contact us at **specialistmortgages@htb.co.uk** to enable or activate your account.

Managing your devices

Adding another email for authentication

You can add another email to your account by double clicking 'Settings' prior to the login screen.

This feature allows you to complete authentication using another 'device' whether email, mobile, authenticator or using the PING ID application. You can only have a maximum of five devices linked to your account at any time. This user guide covers the email and SMS options.

You'll still need to use the business email you used to activate your account to Login though.

We'll display the 'My Devices' screen

Click on 'Add' and which opens up a pop up 'Authentication Required'.

When you click on 'Continue' an 'Authentication' pop up is displayed advising that an email with a passcode has been sent to your business email address (the one you use to log in to the portal).

Enter the passcode and click 'Sign On'. Now that you have been authenticated you can add your new email address this time by selecting 'Add' again.
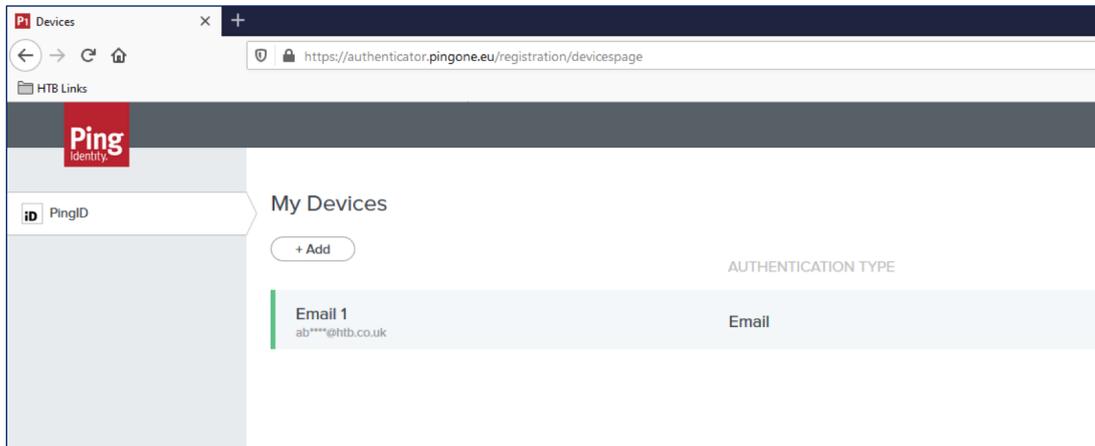
This opens up the 'Add a New Device' pop up.
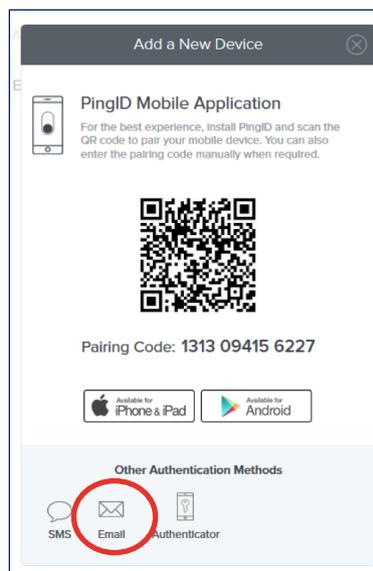
Click on 'Email' which opens up an 'Email' pop up.
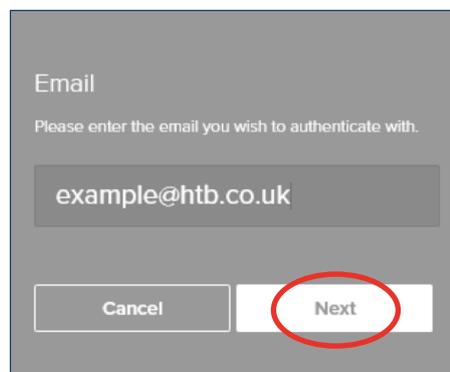
You can now enter your new email to your account, then click 'Next'.

An email with a passcode will be sent to your new email and a 'Verification' pop up will be displayed. Please enter your passcode and click 'Verify' and if we recognise your passcode your new email will be added to 'My devices'.
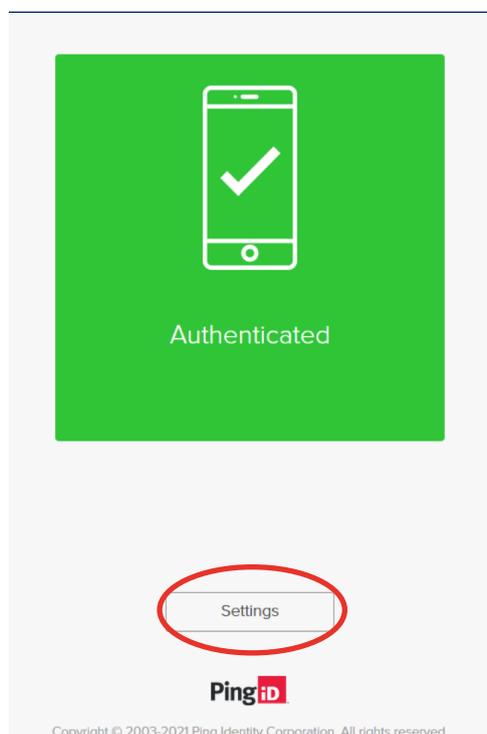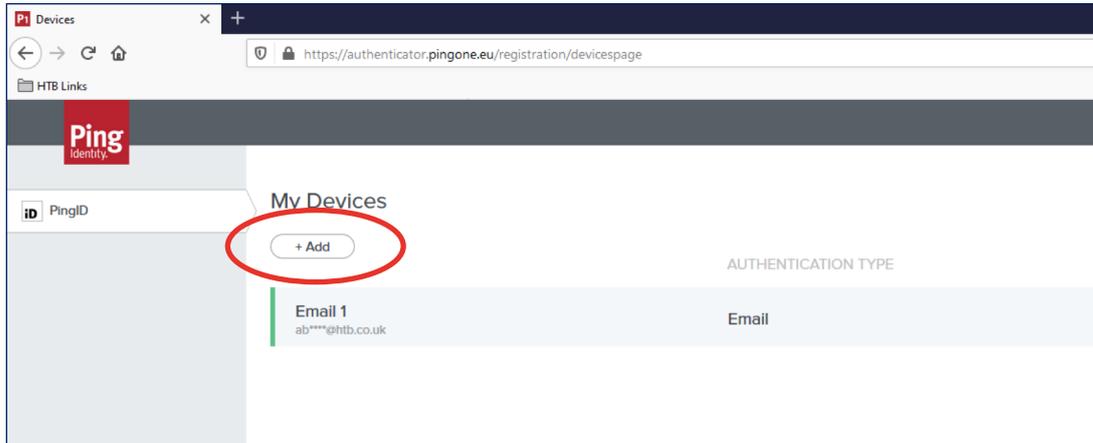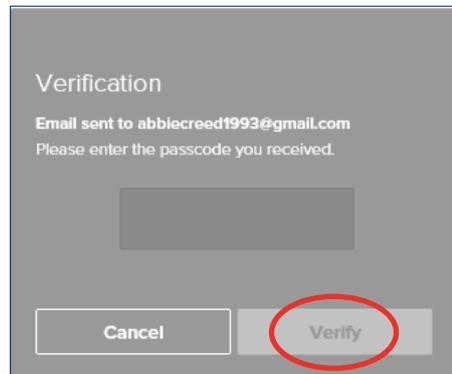

Adding a mobile device for authentication

You can add a mobile to your account by double clicking 'Settings' prior to the login screen.

This feature allows you to complete authentication using another 'device' whether email, mobile, authenticator or using the PING ID application. You can only have a maximum of five devices linked to your account at any time. This user guide covers the email and SMS options.
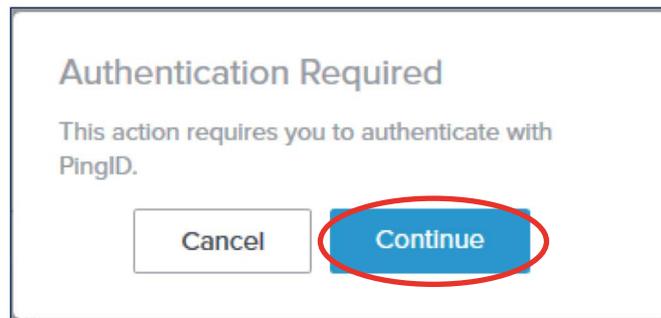
You'll still need to use the business email you used to activate your account to Login though.
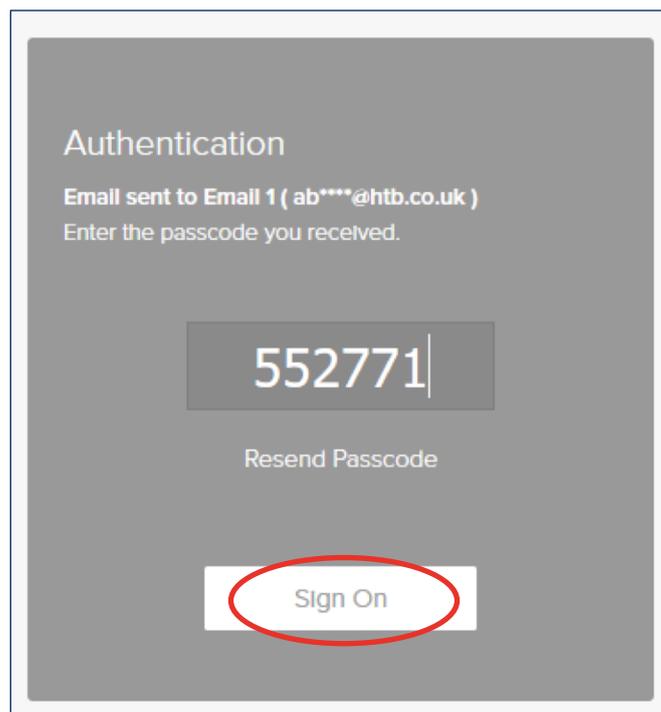
We'll display the 'My Devices' screen

Click on 'Add' and which opens up a pop up 'Authentication Required'.

When you click on 'Continue' an 'Authentication' pop up is displayed advising that an email with a passcode has been sent to your business email address (the one you use to log in to the portal).

Enter the passcode and click 'Sign On'. Now that you have been authenticated you can add your mobile number this time by selecting 'Add' again.
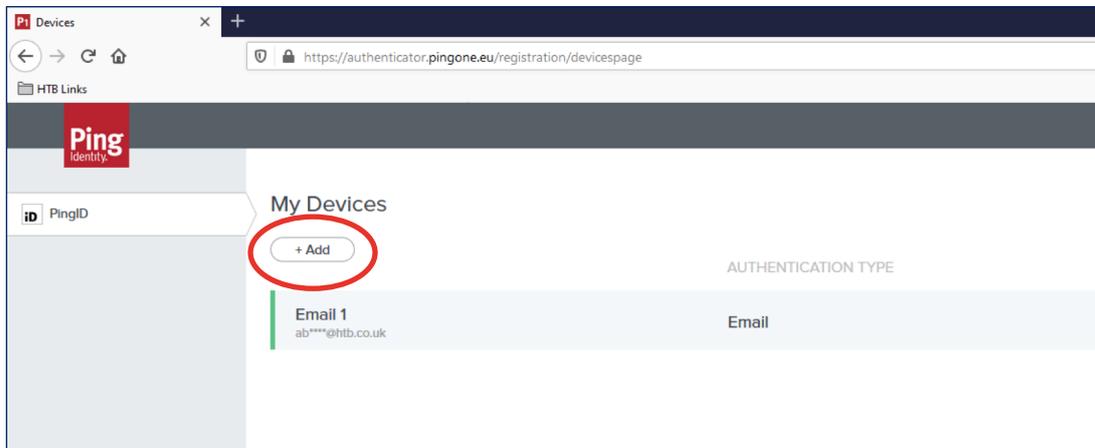
This opens up the 'Add a New Device' pop up.
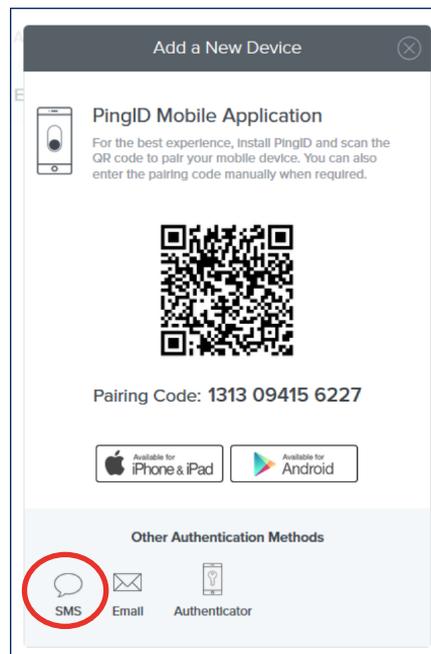


Click on 'SMS' which open up an 'SMS' pop up and select the UK flag and add your mobile number.

Once your mobile has been entered and you have clicked 'Next' an SMS containing a passcode will be sent to your mobile and a 'Verification' pop up will be displayed.

Please enter your passcode and click 'Verify' and if we recognise your passcode your new email will be added to 'My devices'.
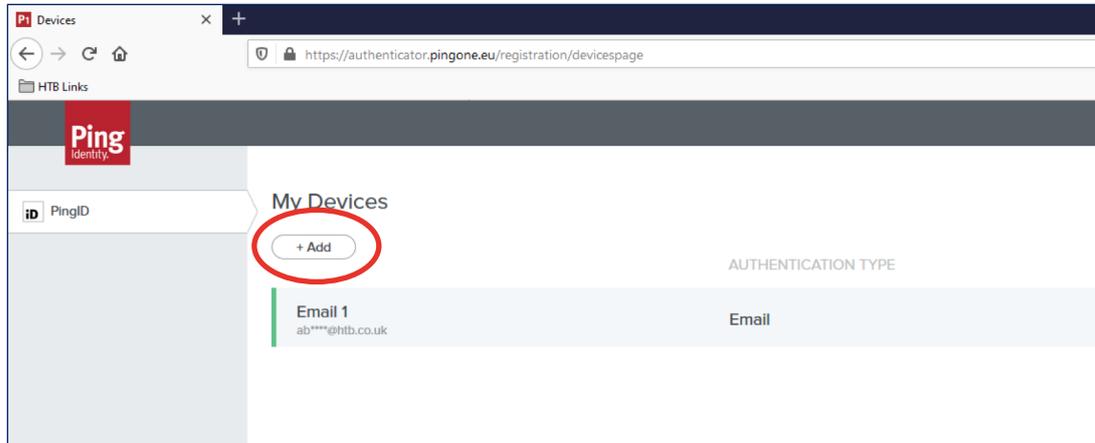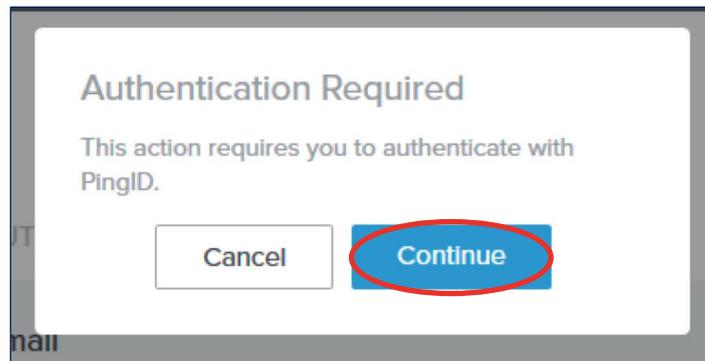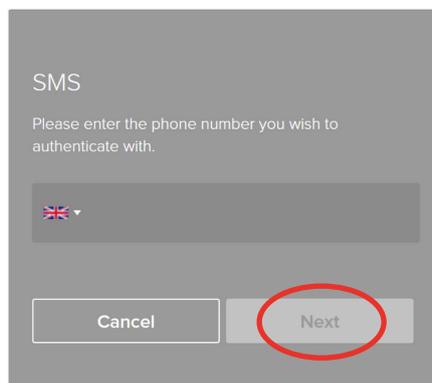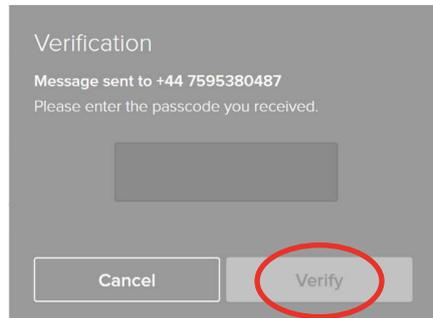
Changing your primary device

If you have added other devices, you can change the primary device used to authenticate your account.

- The slider shown next to your device will be green if it is your primary device.

- You can click on the slider of the device that you would like to make primary device.
- We'll ask you to authenticate your account, once done the slider on your new primary device will turn green and the previous device will turn grey.

Removing a device

You can choose to remove a device if you have more than one by clicking on the icon below.

Once selected, you must select the bin icon to remove the device.

A 'Remove Device' pop up is displayed, click on 'Remove' which will delete your device.