How to add an Assistant on the broker portal

We understand you may need an assistant or administrator in your firm to act on your behalf. assistants can enter data for each of their respective brokers; each broker decides which operations their assistants can perform.

An 'Assistant' profile can be created on our broker portal by an individual within your firm with a 'Supervisor' or 'Advisor and Supervisor' role profile. This individual can also be you or someone else in your business. If you would like to be the 'Supervisor' within your firm we can help you with this by calling us on 0333 456 0333.

To create an 'Assistant' role profile on the broker portal, the 'Supervisor' will need to follow these steps:

- Log on to the broker portal using this link: www.AprilMortgages.co.uk/Broker
- Select the 9-dots (icon) on the top left of the homepage.
- Select 'Broker Panel'
- On the following screen, select 'Assistants'.
- Complete the mandatory fields required – assistant's name, details, email address, mobile number (required for 2-factor authentication)
- Select the tick boxes to confirm acceptance to April's Terms and Conditions
- Press 'Save'

Each assistant will receive a welcome email from April. This email includes a link to the broker portal, their username (email address) and a temporary password.

The broker portal will request their username and the temporary password as provided in the email.

The assistant will then be asked to create a new password (the password must contain 8 characters, uppercase and lowercase letters and at least one special character).

Once entered, a 6-digit confirmation code will be sent to the assistant's mobile number (as provided by the Supervisor during set-up). This code is then to be used in the 'Verification Code' page.

Your assistant will now have access!

To allocate an assistant to a broker please follow these steps:

- The broker must log into the portal and select "My Profile" in the top right corner.
- On the left hand side select option 3 – "My assistants"
- Enter the name of the assistant you wish to allocate and select the level of access authorised

The assistant can then act on the broker's behalf in the capacity allowed and the broker will be able to view their allocated assistants via the assistant option and amend the access options when required.

If you have any queries, please contact us on 0333 456 0333 and we'll talk you through it.