

BM SOLUTIONS MORTGAGE PORTAL

Registration Guide

For the use of mortgage intermediaries and other professionals only

bmsolutions.co.uk

BM SOLUTIONS
FROM BIRMINGHAM MIDSHIRES

REGISTRATION

You will receive a **'Welcome'** email inviting you to the BM Solutions Mortgage Portal.

The 'Welcome' email will refer to:

- **Username** – this will be your email address and form part of your login details
 - Existing users – you will continue to use your existing Intralinks password
 - New users – you will receive a separate email directing you to log in using a temporary password
- **Portal URL** – a hyperlink to the main login page will be included in the email. You will need to save the URL to your browser 'favourites' for future use and ease of access

- **Retrieve ID/Password** – a hyperlink that takes you through the forgotten password process for existing users. After completing the security questions you will be directed to 'Check Your Inbox' where you will receive a 'Reset your Password' email. Click the link in the email and follow the onscreen instructions. At the end of the process you will be directed to click a link to go to the login page (see **page 6**)

Note: A hyperlink to this user guide is included in the welcome email. The URL www.bmsolutions.co.uk/mortgageportal/ is also displayed at the bottom of each screen within the Portal.

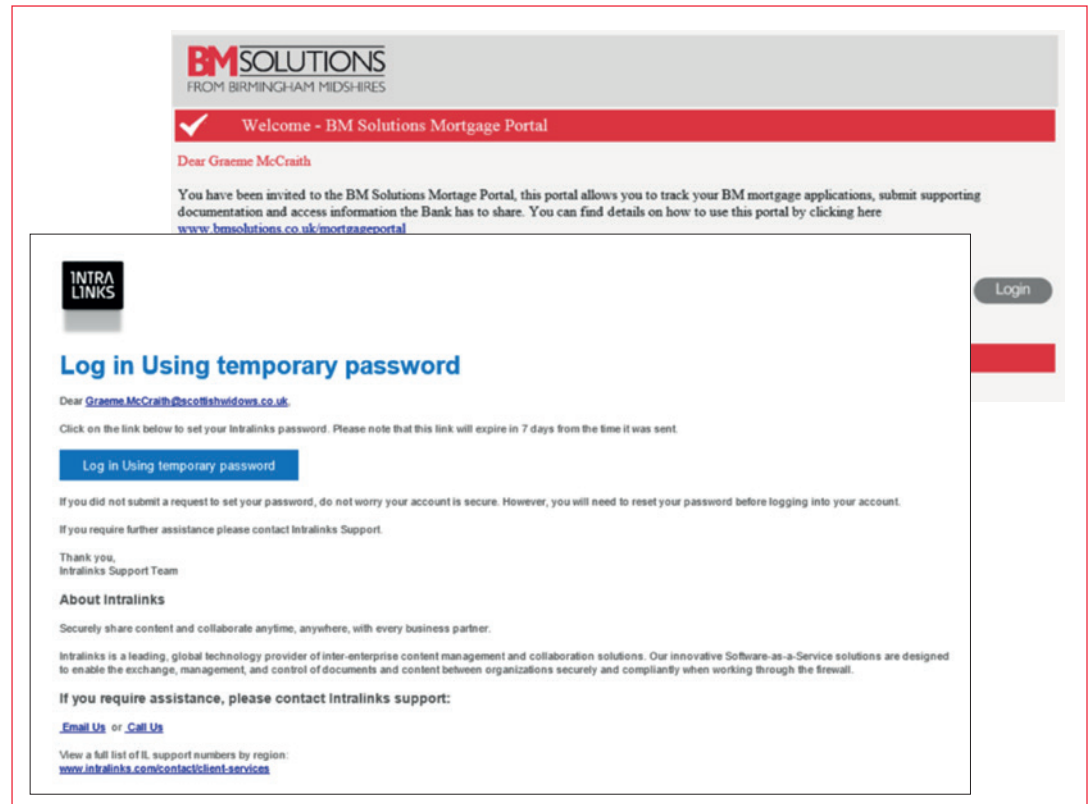
REGISTRATION

If you're experiencing difficulty in receiving the 'welcome' or 'temporary password' emails, you may wish to consider adding our sender address to your 'safe sender' recipient list within Outlook.

You can do this in 4 easy steps:

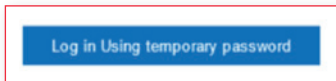
1. Within Outlook, select **Junk E-mail** from the main 'Home' tool bar (or select Tools, Options, Preferences, Junk E-mail)
2. Click the **Safe Senders** or **Safe Recipients** tab
3. Click **Add** to enter email addresses from the following Intralink domain email addresses
 - welcome email address:
welcome@intralinks.com
 - temporary password and key milestone alerts email address:
publications_comments@intralinks.com
4. Click **OK**

Done – you will now receive document upload related emails and alerts to your main mailbox.

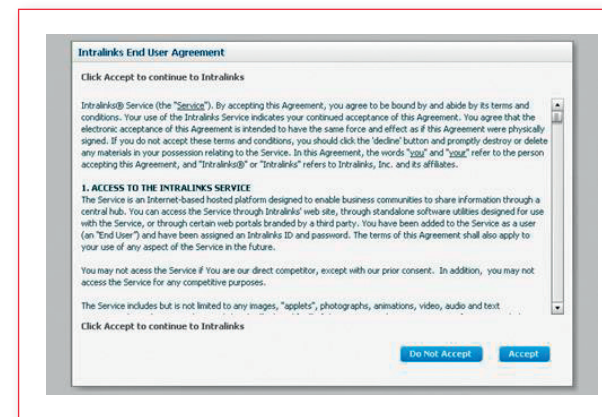
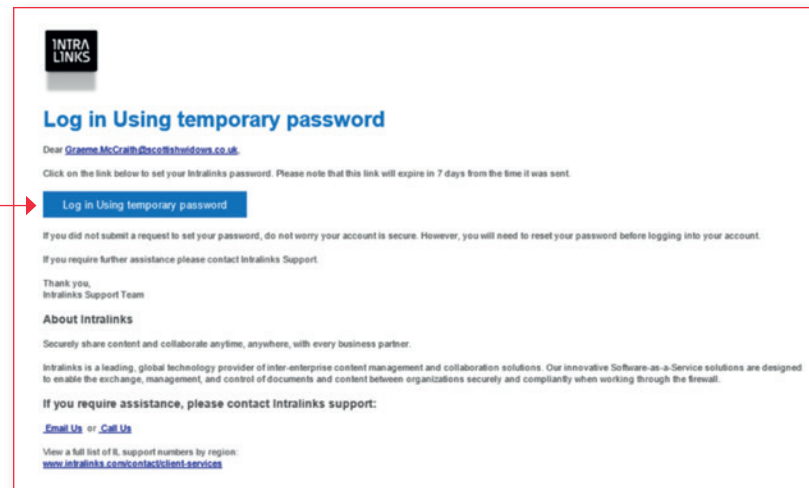


REGISTRATION – NEW USERS ONLY

- As part of the document upload registration process, new users will receive an automatic email asking you to 'Log in using temporary password'



- Follow the link in the email to set a new password for your account. This is a one time set up process
- Your password will need to be set within 7 days of receiving the email, or you'll need to contact support@intralinks.com or call **0208 068 4800** to request a new password
- After clicking 'Log in using temporary password' you'll be presented with the 'Intralinks End User Agreement'. Click **Accept** to continue with the registration process



REGISTRATION – NEW USERS ONLY

- After accepting the 'End User Agreement' you'll be prompted to specify a **'New password'** and a **'Challenge question'** which can be used to unlock your account should you forget your password in the future
- We also recommend your 'Language Preference' is set to **'English (International)'**
- You will not need to change the 'Time Zone' option as this will automatically pick up the time from your local device settings

Graeme McCraith - Setup Your IntraLinks Profile

Once you have completed your profile information you will be logged into IntraLinks.

Password and Challenge Question

New Password*

Confirm New Password*

New Challenge Question*

Answer*

Show Typing

Contact Information

Name: Graeme McCraith

Email(IntraLinks ID): Graeme.McCraith@scottishwidows.co.uk

Organization: Scottish Widows

Address Line 1

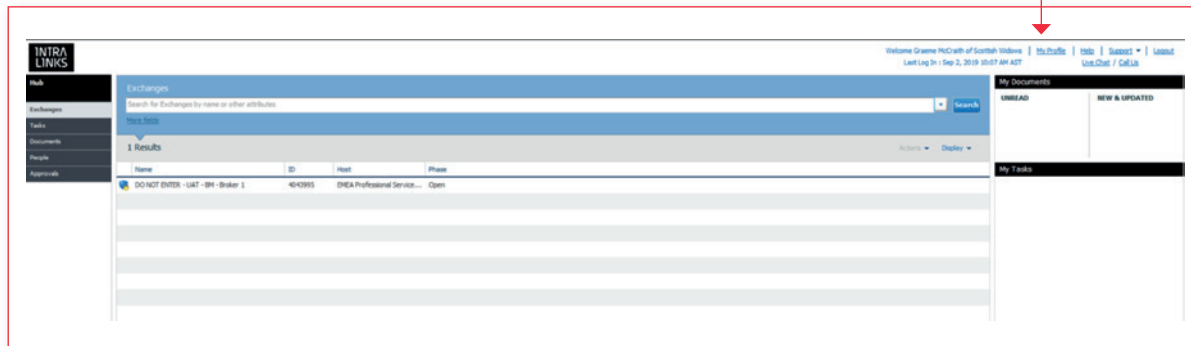
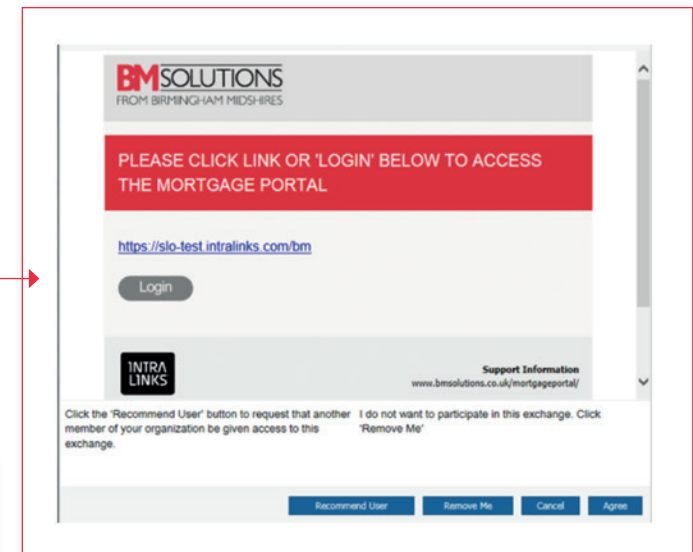
Address Line 2

*Required field

REGISTRATION – NEW USERS/FORGOTTEN PASSWORD ONLY

- If at the end of the registration/forgotten password process you are presented with the **'PLEASE CLICK LINK OR 'LOGIN' BELOW TO ACCESS THE MORTGAGE PORTAL'** splash page, click on the **URL** or the grey **Login** button as instructed to be directed to the Login page for our new portal

Note: When working through the registration or forgotten password process, a separate window (as shown below) is open in the background. Once you have set your password, this window can be closed. Click **X** or **Logout** (located in the top right of the screen).



This information is available in large print, Braille or on audio. Customers can also contact us by using Text Relay.

Important information

Birmingham Midshires is a division of Bank of Scotland plc. Registered in Scotland No. SC327000. Registered Office: The Mound, Edinburgh EH1 1YZ. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register number 169628. Telephone calls may be monitored or recorded.