



# How to log into your account

Issued February 2021



**HTB**

PUMA for  
Intermediaries

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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'.



## 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.

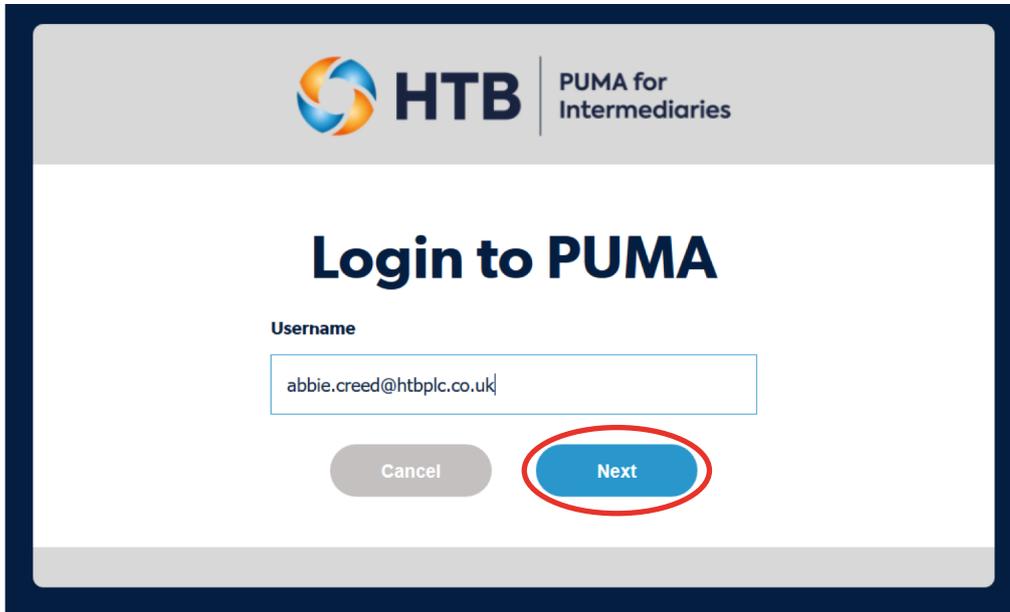
## Existing intermediaries



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.

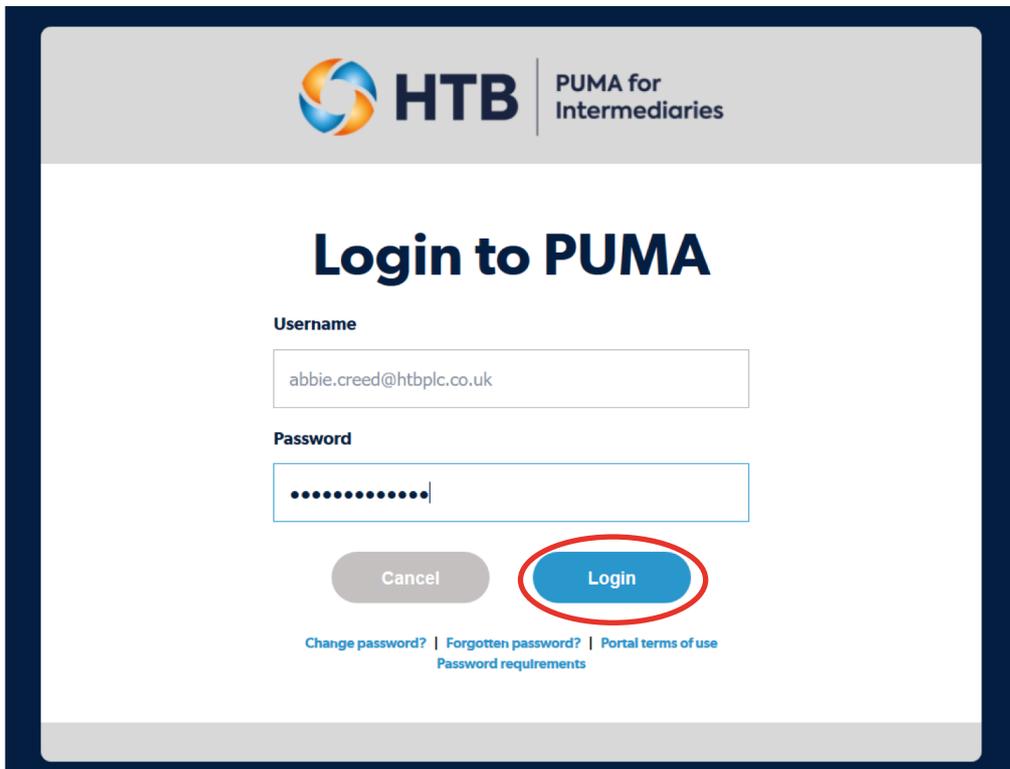
## Enter your username

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



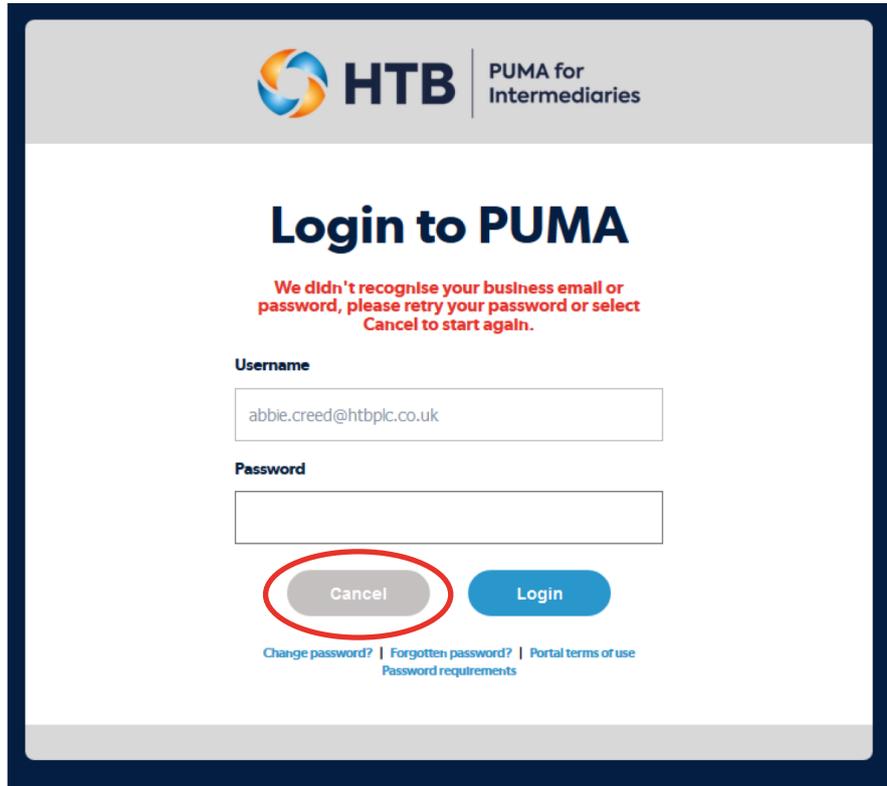
The screenshot shows the 'Login to PUMA' page. At the top, there is the HTB logo and the text 'PUMA for Intermediaries'. Below this, the heading 'Login to PUMA' is displayed. Underneath, there is a 'Username' label and a text input field containing the email address 'abbie.creed@htbplc.co.uk'. Below the input field are two buttons: a grey 'Cancel' button and a blue 'Next' button. The 'Next' button is circled in red.

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



The screenshot shows the 'Login to PUMA' page. At the top, there is the HTB logo and the text 'PUMA for Intermediaries'. Below this, the heading 'Login to PUMA' is displayed. Underneath, there is a 'Username' label and a text input field containing the email address 'abbie.creed@htbplc.co.uk'. Below the username field is a 'Password' label and a password input field filled with dots. Below the password field are two buttons: a grey 'Cancel' button and a blue 'Login' button. The 'Login' button is circled in red. At the bottom of the form, there are links for 'Change password?', 'Forgotten password?', 'Portal terms of use', and 'Password requirements'.

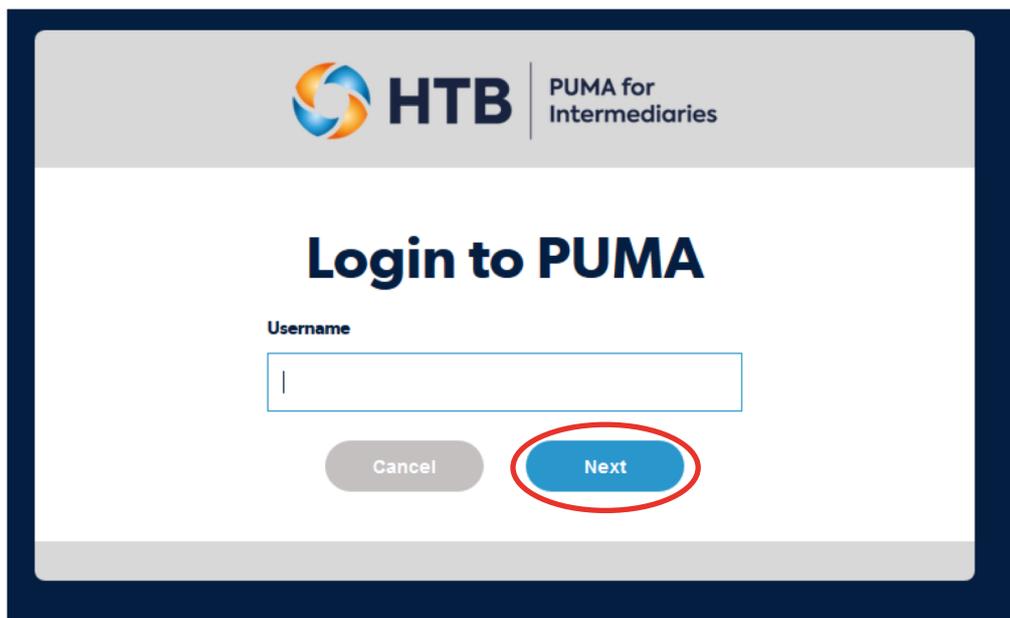
We'll display an error message if we don't recognise your business email or your password.



The screenshot shows the HTB PUMA for Intermediaries login page. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, a red error message reads: 'We didn't recognise your business email or password, please retry your password or select Cancel to start again.' There are two input fields: 'Username' containing 'abbie.creed@htbpic.co.uk' and an empty 'Password' field. Below the fields are two buttons: 'Cancel' (highlighted with a red circle) and 'Login'. At the bottom, there are links for 'Change password?', 'Forgotten password?', 'Portal terms of use', and 'Password requirements'.

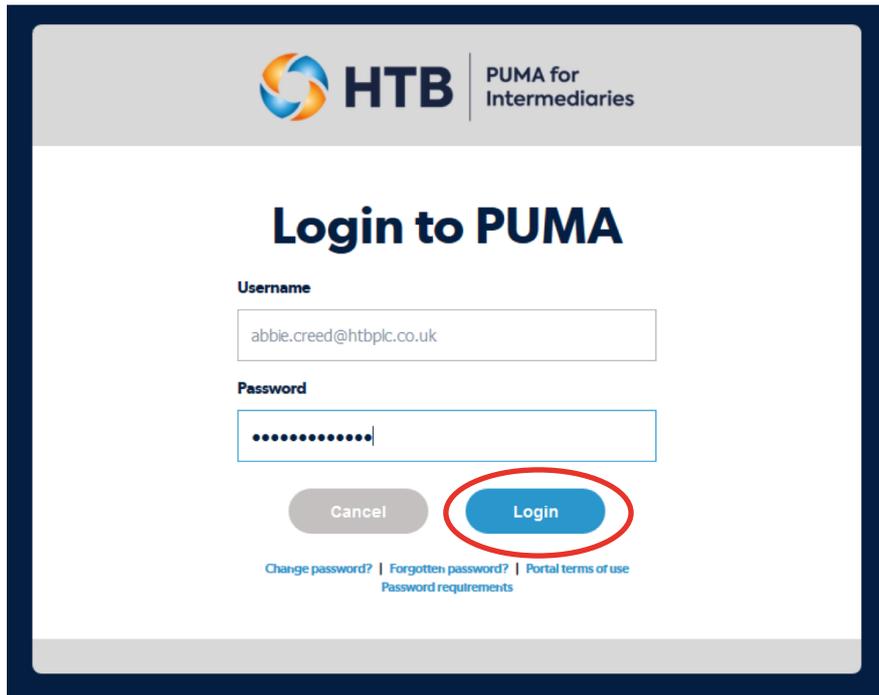
### Entered the wrong username?

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'.



The screenshot shows the HTB PUMA for Intermediaries login page. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, the 'Username' field is empty. There are two buttons: 'Cancel' and 'Next' (highlighted with a red circle).

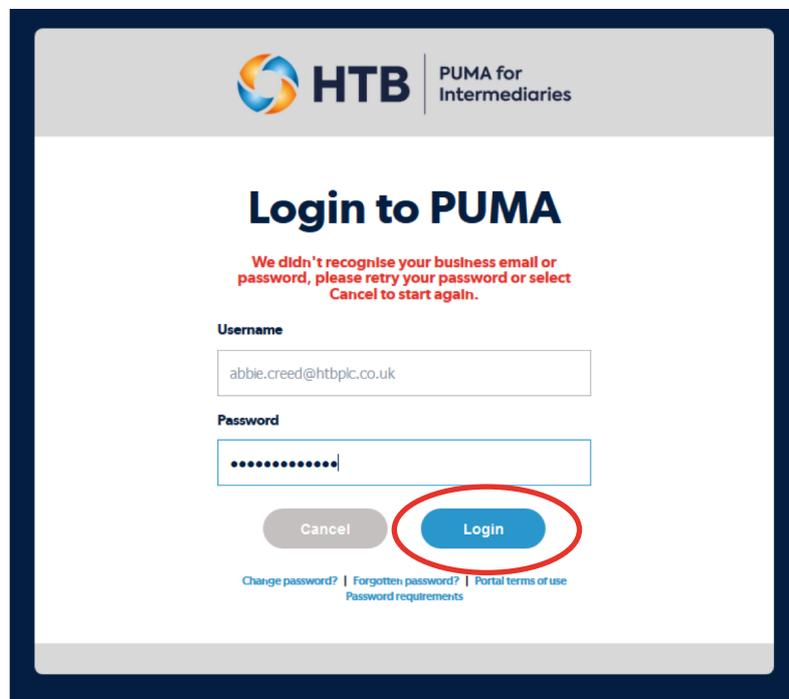
Re-enter your password and click 'Login'.



The screenshot shows the HTB PUMA login interface. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, there are two input fields: 'Username' containing 'abbie.creed@htbplc.co.uk' and 'Password' containing a masked password. A 'Cancel' button is on the left and a 'Login' button is on the right, which is circled in red. At the bottom, there are links for 'Change password?', 'Forgotten password?', and 'Portal terms of use Password requirements'.

### Entered the wrong password?

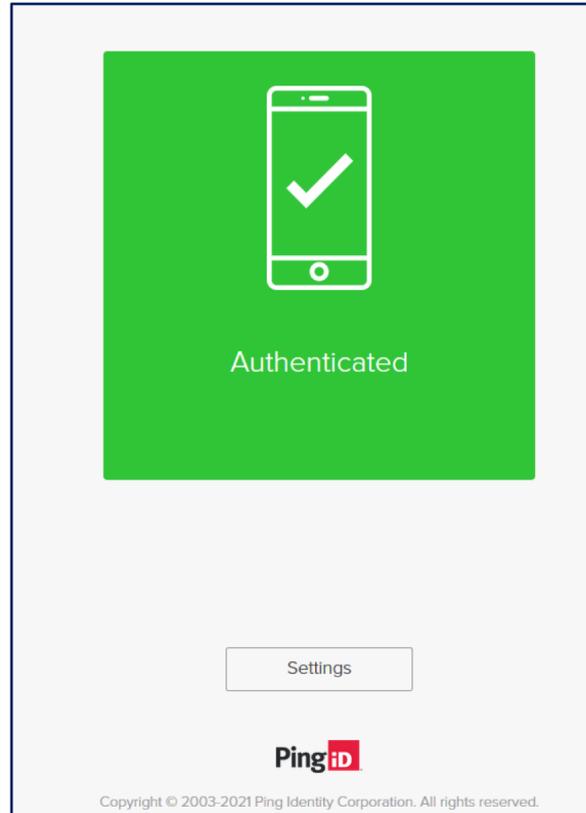
If you've checked the username and its correct then re-enter your password and click 'Login'.



The screenshot shows the HTB PUMA login interface with an error message. The heading is 'Login to PUMA'. Below the heading, a red error message reads: 'We didn't recognise your business email or password, please retry your password or select Cancel to start again.' The 'Username' field contains 'abbie.creed@htbplc.co.uk' and the 'Password' field contains a masked password. The 'Login' button is circled in red. At the bottom, there are links for 'Change password?', 'Forgotten password?', and 'Portal terms of use Password requirements'.

## Login successful

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



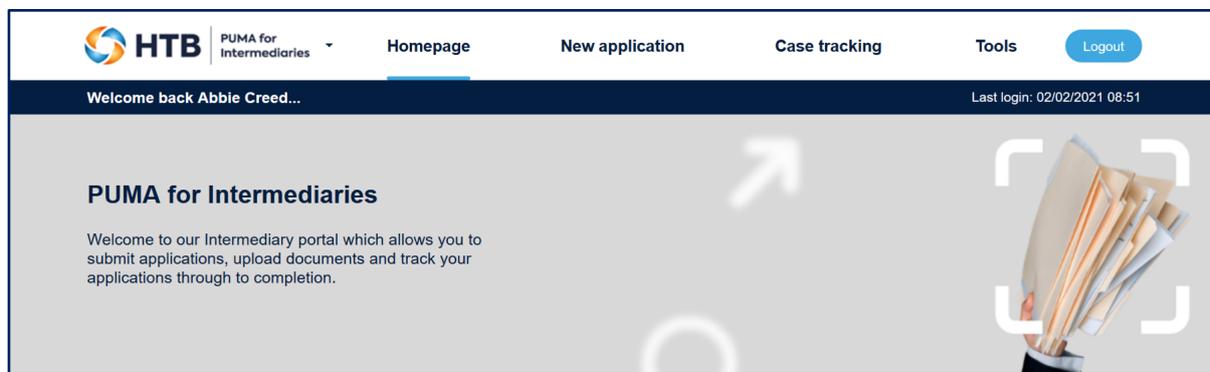
# Homepage



## 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](https://www.htb.co.uk) website.

### Cases in progress

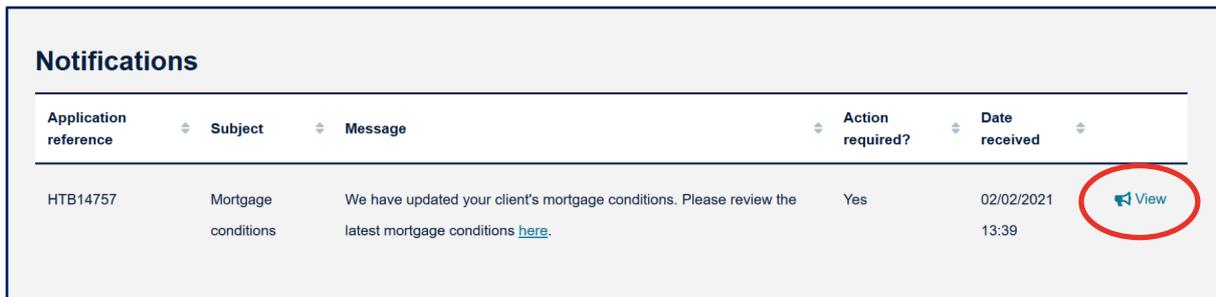
On the Homepage, a summary of all your 'Cases in progress' is summarised by case status.



- 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.



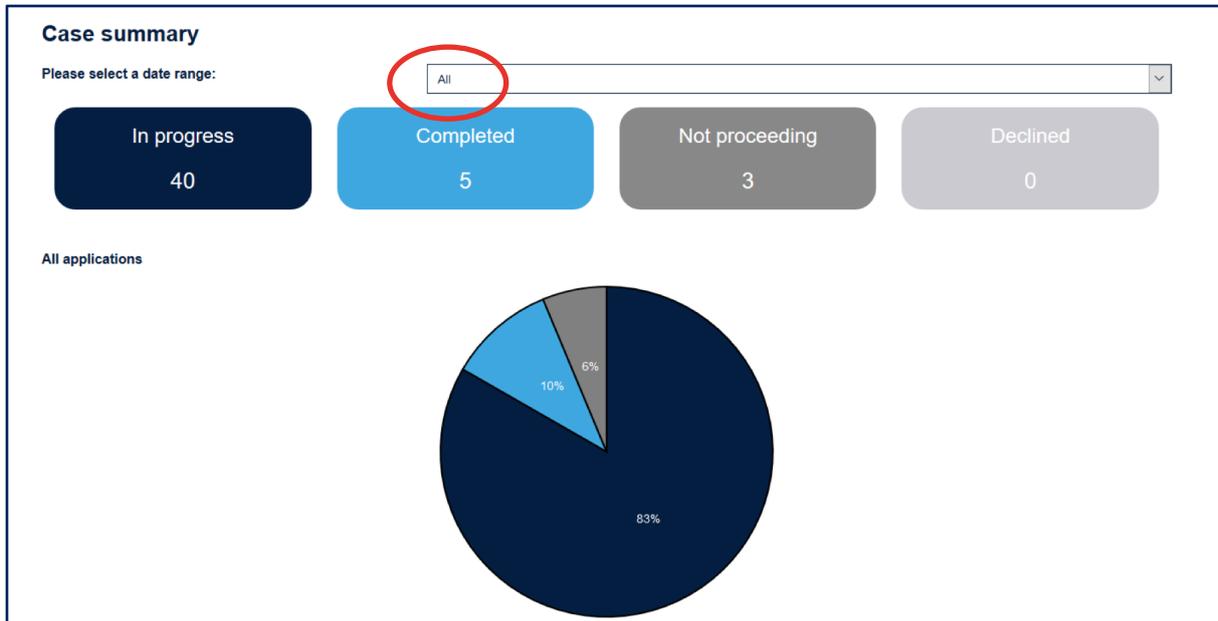
Application reference	Subject	Message	Action required?	Date received	
HTB14757	Mortgage conditions	We have updated your client's mortgage conditions. Please review the latest mortgage conditions <a href="#">here</a> .	Yes	02/02/2021 13:39	<a href="#">View</a>

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.

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## Login to PUMA

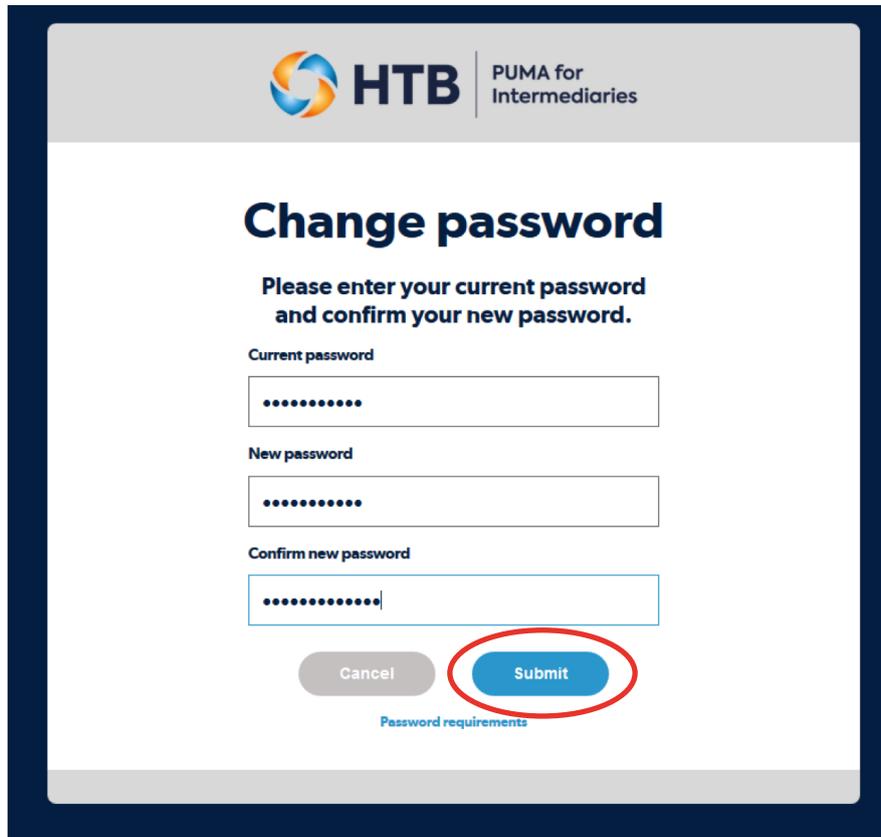
**Username**

**Password**

[Cancel](#) [Login](#)

[Change password?](#) | [Forgotten password?](#) | [Portal terms of use](#)  
[Password requirements](#)

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'.



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## Change password

Please enter your current password and confirm your new password.

Current password

New password

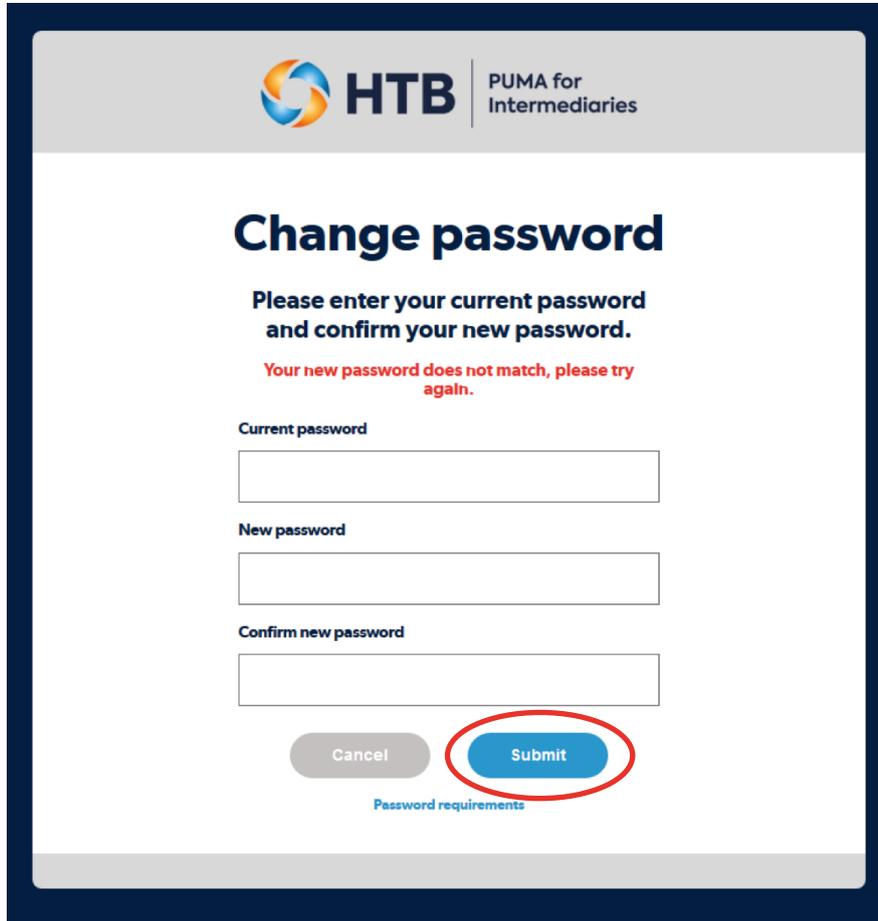
Confirm new password

[Cancel](#) [Submit](#)

[Password requirements](#)

## 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'.



 HTB | PUMA for Intermediaries

## Change password

Please enter your current password and confirm your new password.

Your new password does not match, please try again.

Current password

New password

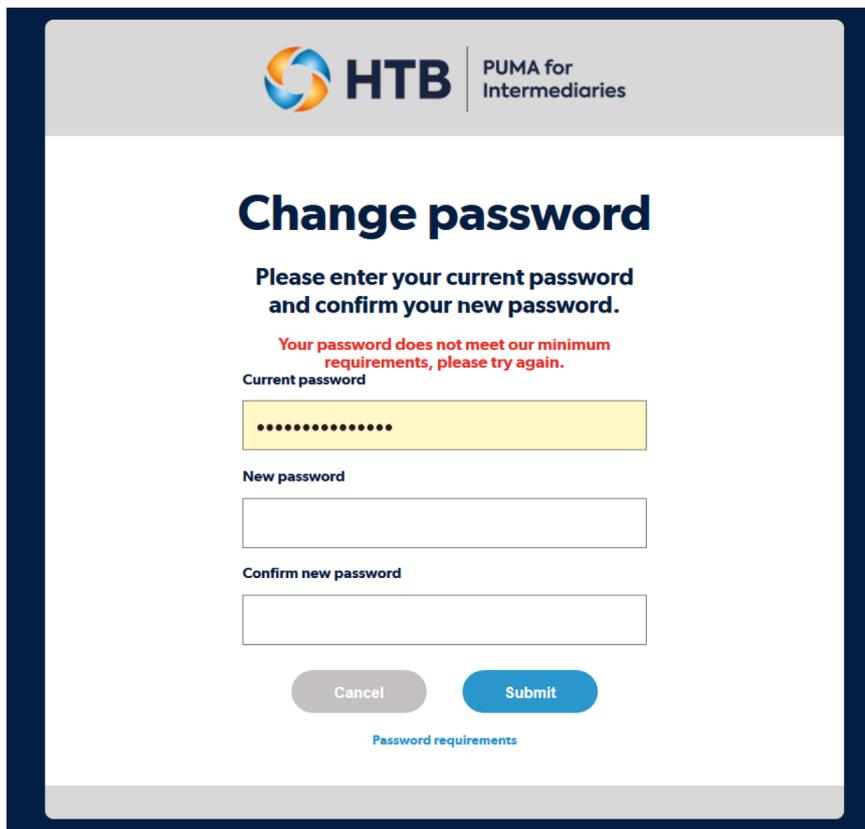
Confirm new password

[Password requirements](#)

## 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'.



 HTB | PUMA for Intermediaries

## Change password

Please enter your current password and confirm your new password.

Your password does not meet our minimum requirements, please try again.

Current password

New password

Confirm new password

[Cancel](#) [Submit](#)

[Password requirements](#)

# Trouble logging in?

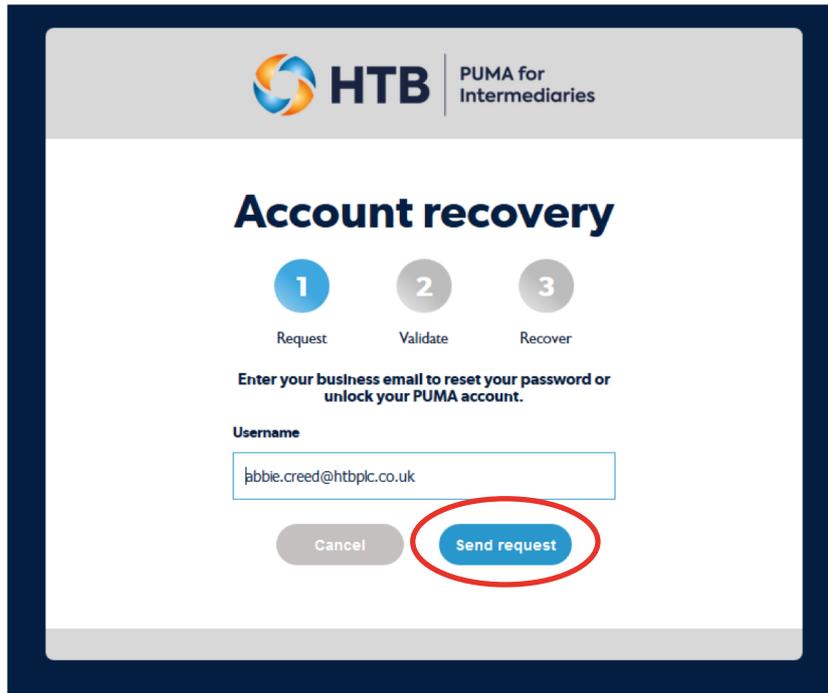


## Forgotten your password?

If you can't remember your password you can recover your account by clicking 'Forgotten password'.

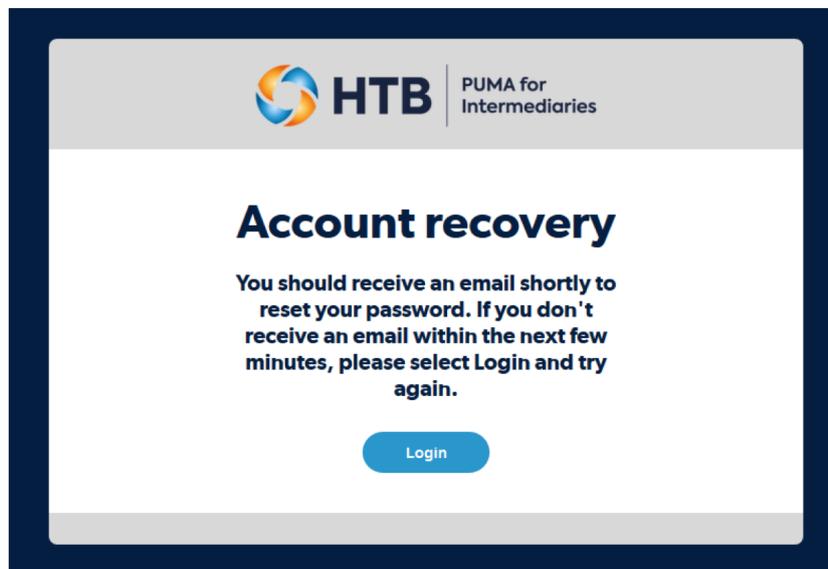
The screenshot shows the PUMA login interface for HTB Intermediaries. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, a red error message reads: 'We didn't recognise your business email or password, please retry your password or select Cancel to start again.' The form contains two input fields: 'Username' with the value 'abbie.creed@htbplc.co.uk' and an empty 'Password' field. There are 'Cancel' and 'Login' buttons. At the bottom, a row of links includes 'Change password?', 'Forgotten password?' (circled in red), and 'portal terms of use password requirements'.

Enter your business email in the Username field and click 'Send request'.



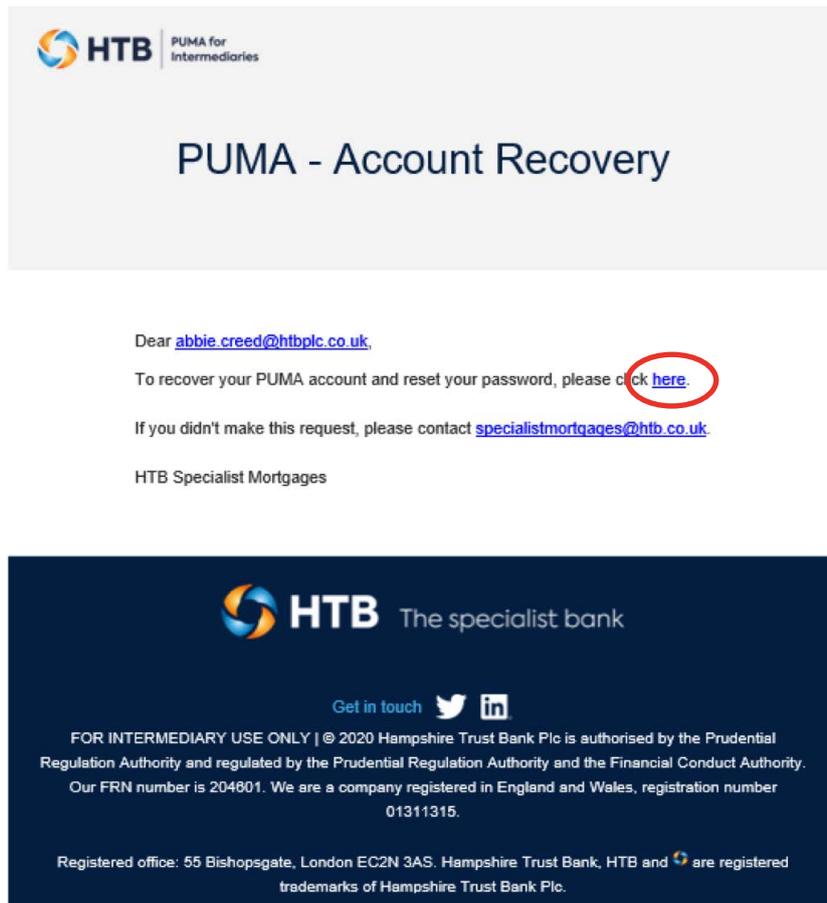
The screenshot shows the 'Account recovery' page for HTB PUMA for Intermediaries. It features a three-step process: 1. Request, 2. Validate, and 3. Recover. The 'Request' step is active. Below the steps, there is a prompt: 'Enter your business email to reset your password or unlock your PUMA account.' A 'Username' field contains the email address 'jbbie.creed@htbplc.co.uk'. At the bottom, there are two buttons: 'Cancel' and 'Send request', with the 'Send request' button circled in red.

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



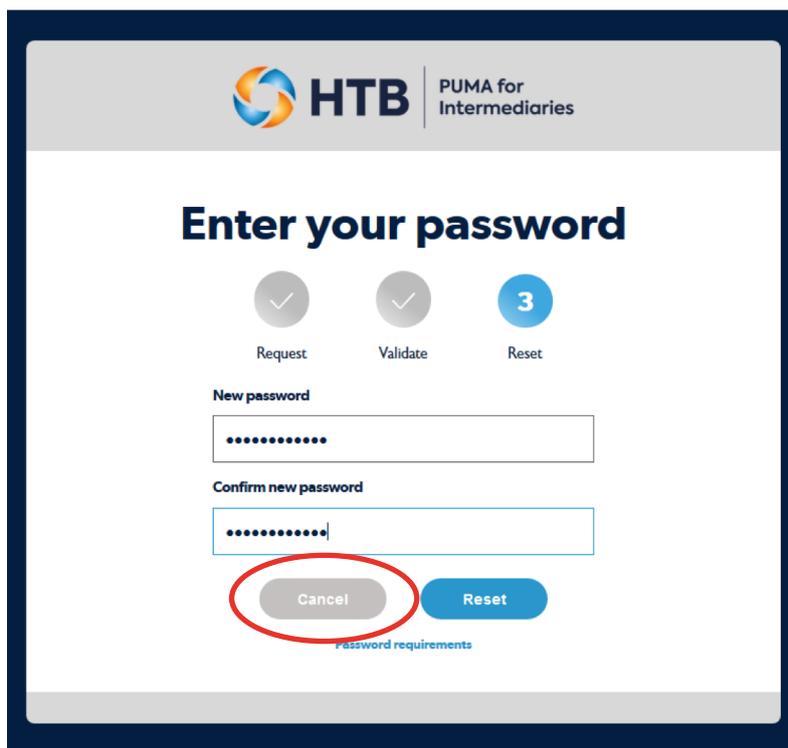
The screenshot shows the 'Account recovery' page after the request has been submitted. It features the HTB logo and the text: 'You should receive an email shortly to reset your password. If you don't receive an email within the next few minutes, please select Login and try again.' A 'Login' button is centered at the bottom of the page.

Once you have received an email, click 'here' to reset your password.



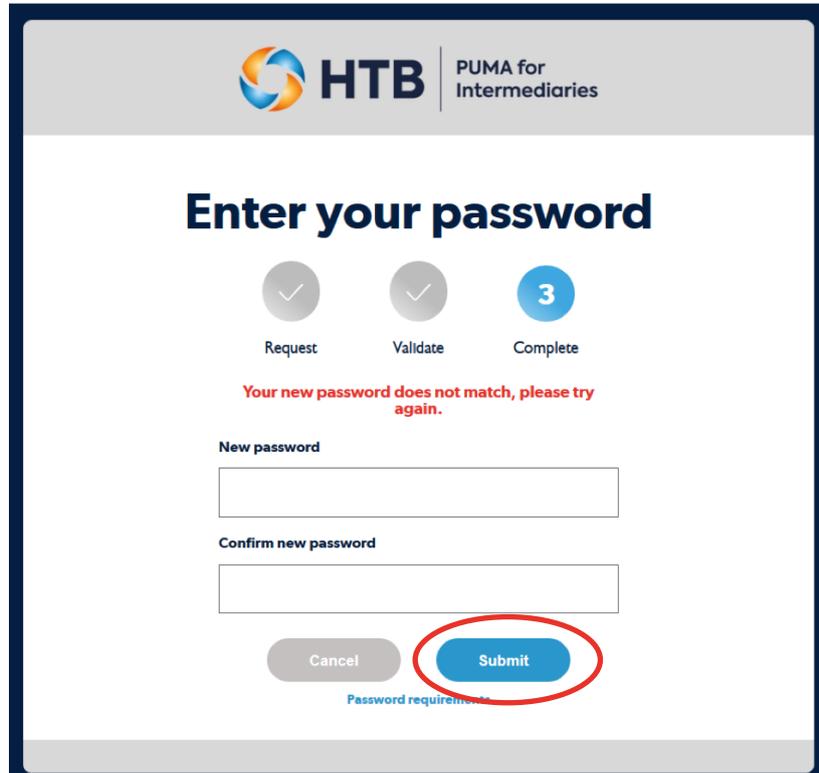
This will take you to the 'Enter your password' page.

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'.

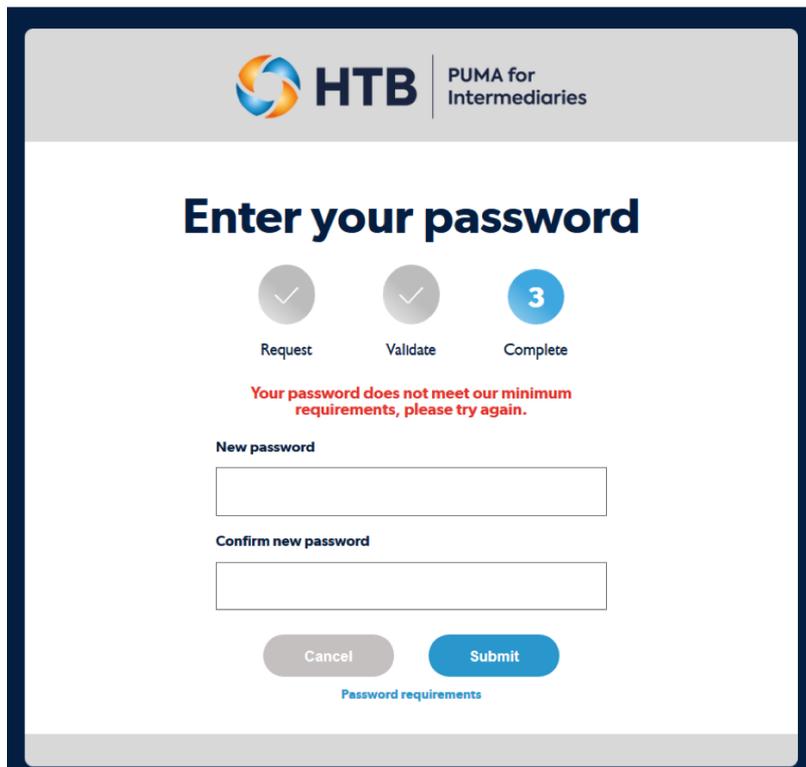


The screenshot shows the HTB PUMA for Intermediaries password reset interface. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Enter your password'. Below this, there are three progress indicators: 'Request' and 'Validate' are shown with checkmarks in grey circles, and 'Complete' is shown with the number '3' in a blue circle. A red error message states: 'Your new password does not match, please try again.' Below the error message are two input fields: 'New password' and 'Confirm new password'. At the bottom, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is circled in red. A link for 'Password requirements' is visible at the bottom of the form area.

## 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'

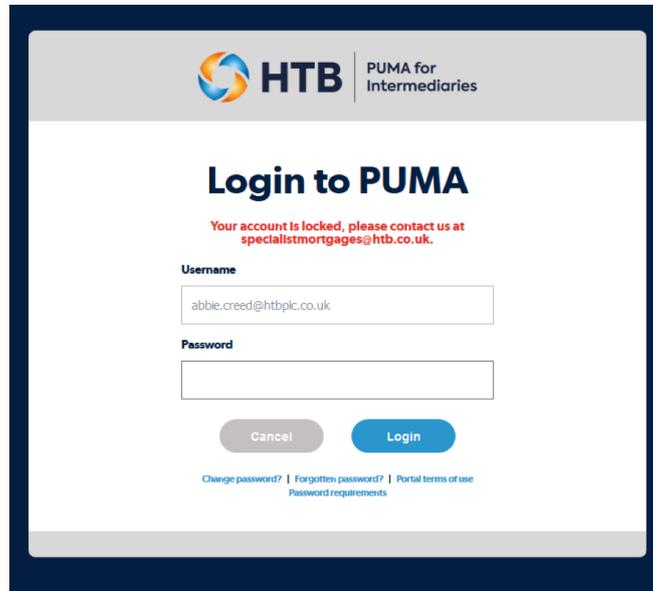
You can click 'Password requirements', which explains 'a password must be a minimum of 12 characters including a mix of uppercase, lowercase, numbers and special characters'.



The screenshot shows the HTB PUMA for Intermediaries login interface. At the top, the HTB logo and "PUMA for Intermediaries" are displayed. The main heading is "Enter your password". Below this, there are three progress indicators: "Request" (checked), "Validate" (checked), and "Complete" (3, indicating 3 requirements). A red error message states: "Your password does not meet our minimum requirements, please try again." Below the error message are two input fields: "New password" and "Confirm new password". At the bottom, there are "Cancel" and "Submit" buttons, and a link for "Password requirements".

## 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.

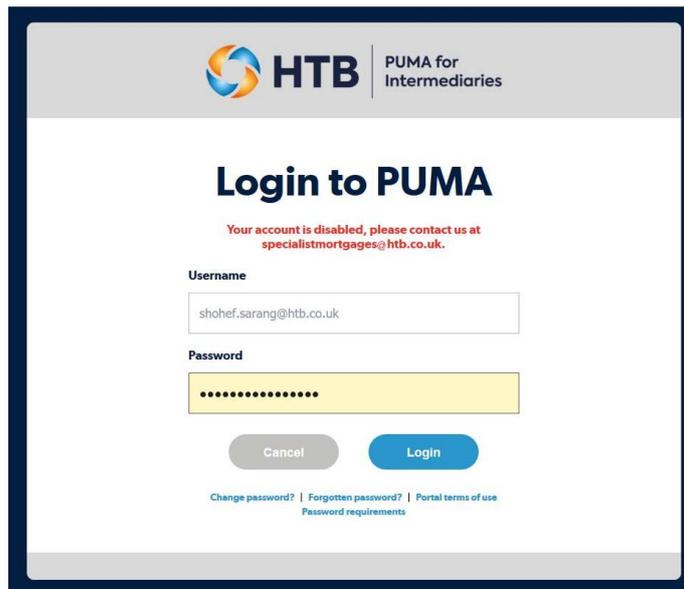


The screenshot shows the PUMA login interface. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, a red error message states: 'Your account is locked, please contact us at [specialistmortgages@htb.co.uk](mailto:specialistmortgages@htb.co.uk).' There are two input fields: 'Username' with the value 'abbie.creed@htbpic.co.uk' and an empty 'Password' field. Below the fields are 'Cancel' and 'Login' buttons. At the bottom, there are links for 'Change password?', 'Forgotten password?', 'Portal terms of use', and 'Password requirements'.

If you are still having trouble in logging in then contact us at [specialistmortgages@htb.co.uk](mailto: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](mailto:specialistmortgages@htb.co.uk) to enable or activate your account.



The screenshot shows the PUMA login interface. At the top, the HTB logo and 'PUMA for Intermediaries' are displayed. The main heading is 'Login to PUMA'. Below this, a red error message states: 'Your account is disabled, please contact us at [specialistmortgages@htb.co.uk](mailto:specialistmortgages@htb.co.uk).' There are two input fields: 'Username' with the value 'shohof.sarang@htb.co.uk' and a 'Password' field filled with dots. Below the fields are 'Cancel' and 'Login' buttons. At the bottom, there are links for 'Change password?', 'Forgotten password?', 'Portal terms of use', and 'Password requirements'.

# Managing your devices

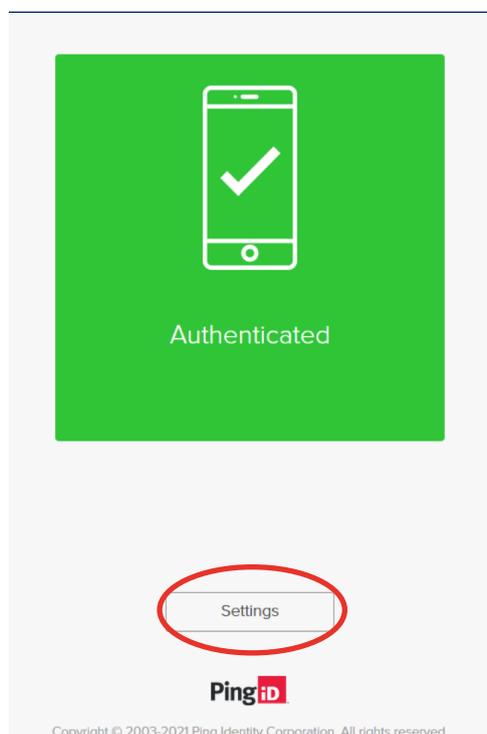


## Adding another email for authentication

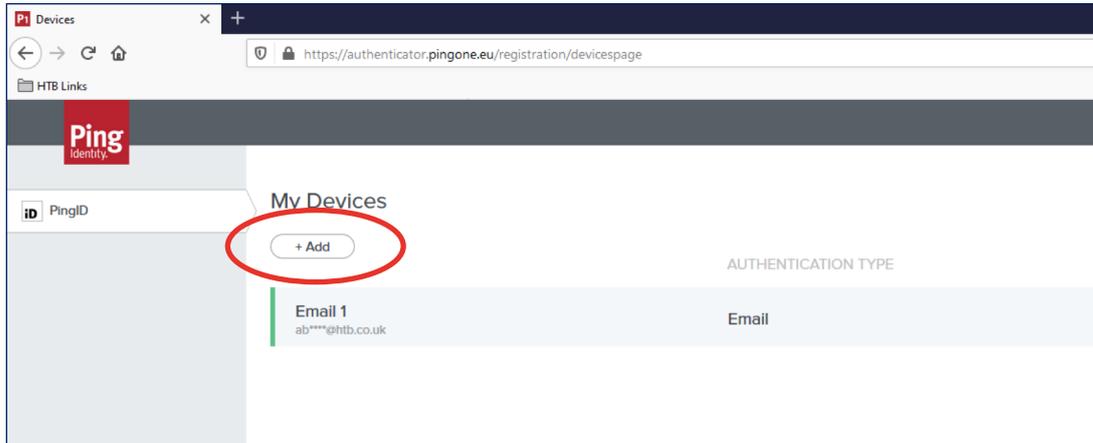
You can add another email to your account by double clicking 'Settings' prior to the login screen.

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.

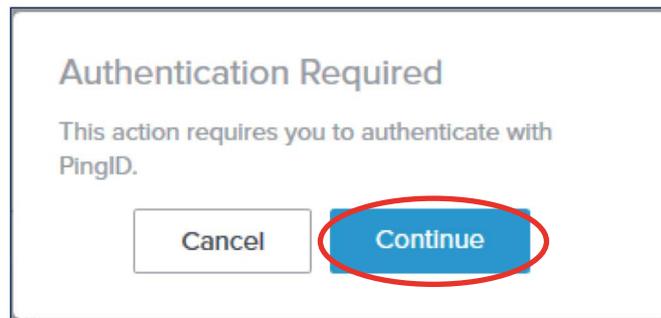
You'll still need to use the business email you used to activate your account to Login though.



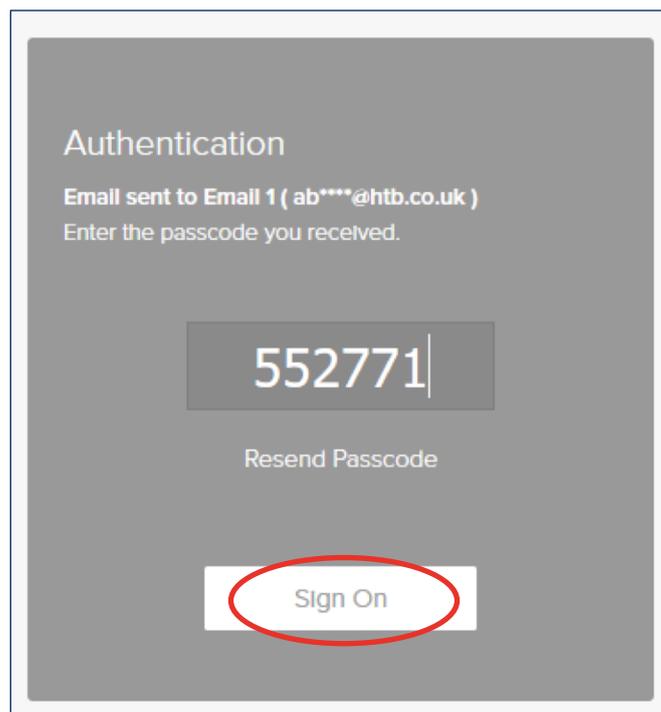
We'll display the 'My Devices' screen



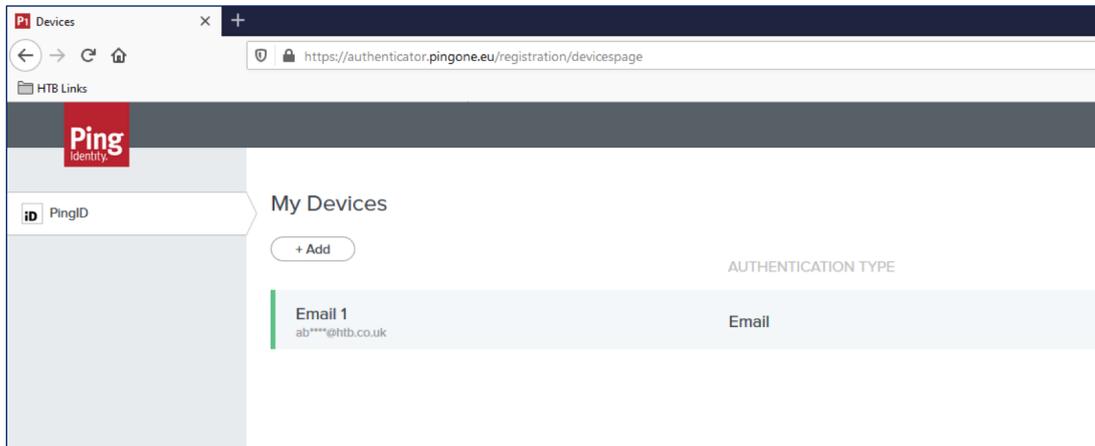
Click on 'Add' and which opens up a pop up 'Authentication Required'.



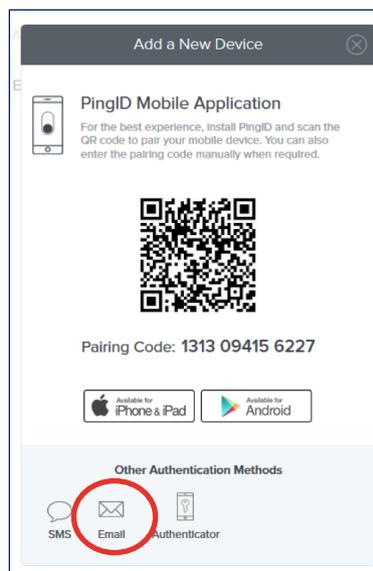
When you click on 'Continue' an 'Authentication' pop up is displayed advising that an email with a passcode has been sent to your business email address (the one you use to log in to the portal).



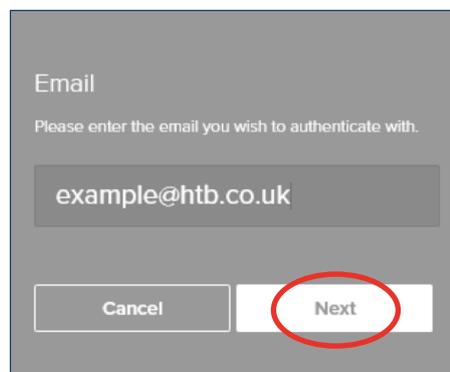
Enter the passcode and click 'Sign On'. Now that you have been authenticated you can add your new email address this time by selecting 'Add' again.



This opens up the 'Add a New Device' pop up.

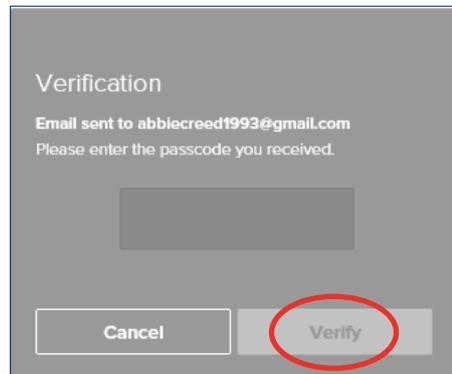


Click on 'Email' which opens up an 'Email' pop up.



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'.

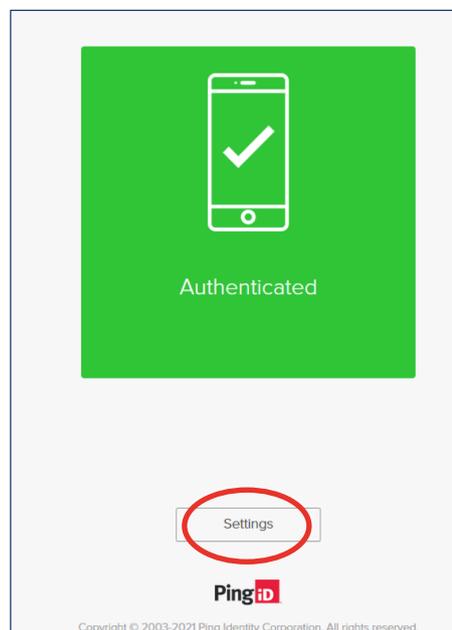


### Adding a mobile device for authentication

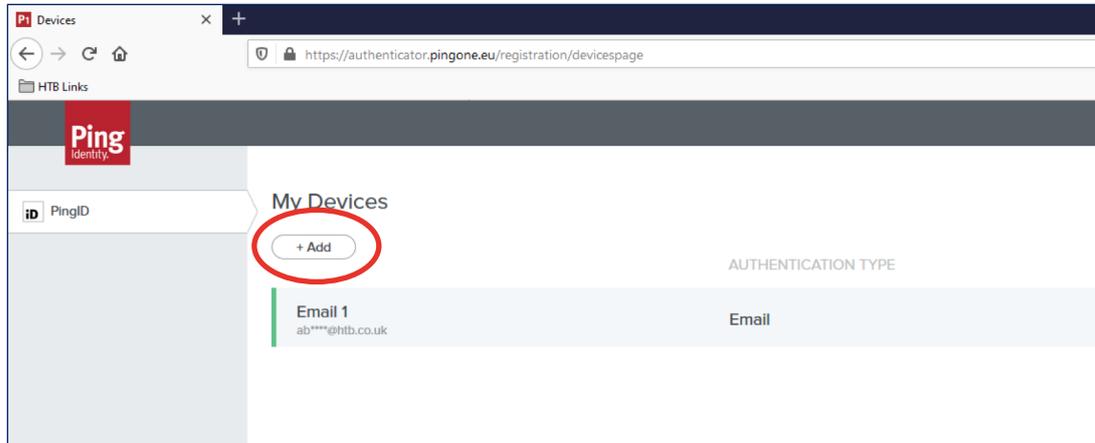
You can add a mobile to your account by double clicking 'Settings' prior to the login screen.

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.

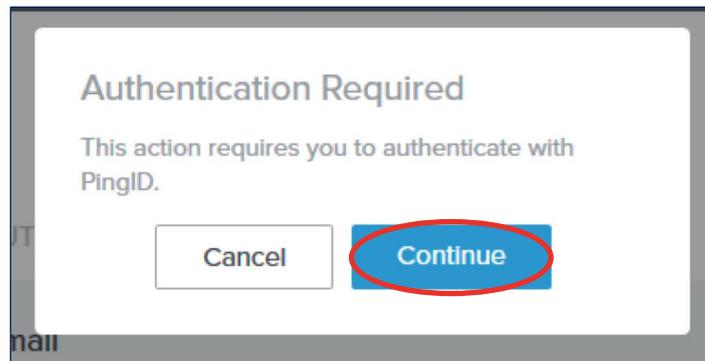
You'll still need to use the business email you used to activate your account to Login though.



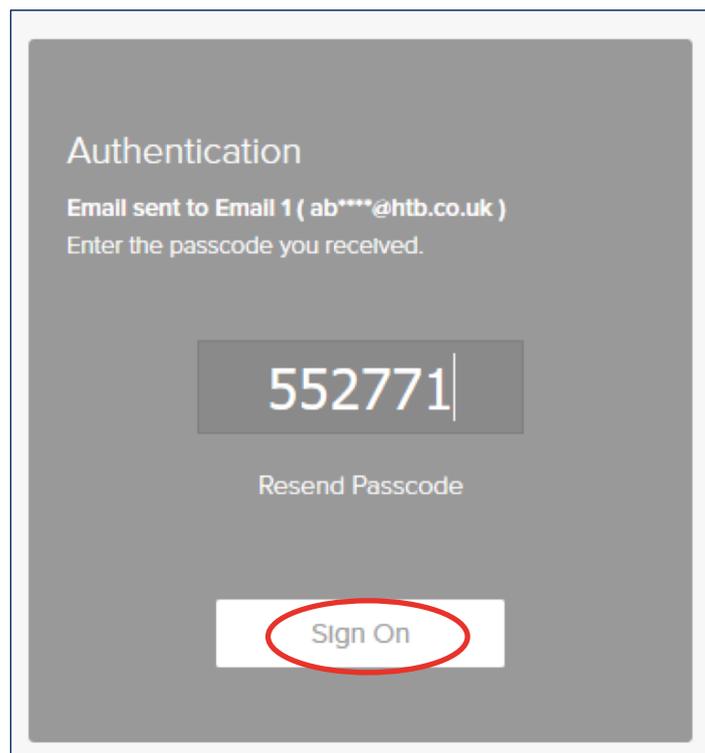
We'll display the 'My Devices' screen



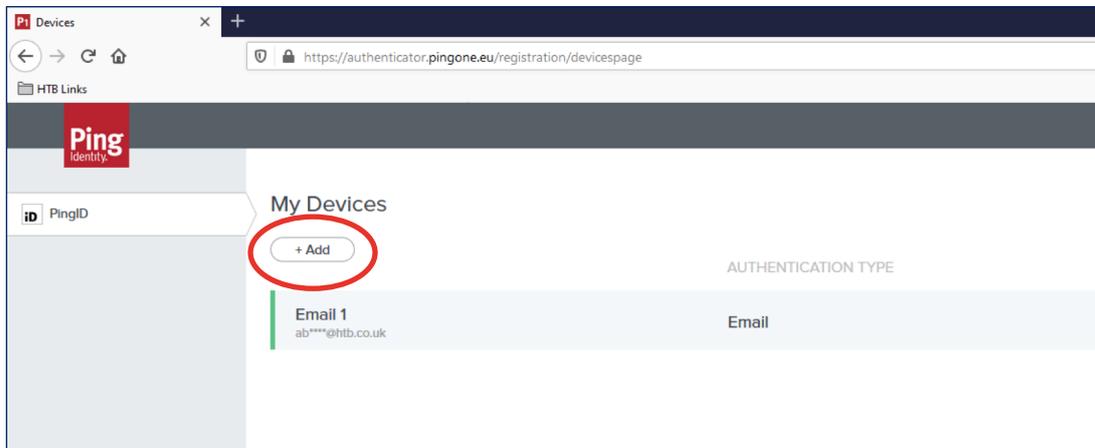
Click on 'Add' and which opens up a pop up 'Authentication Required'.



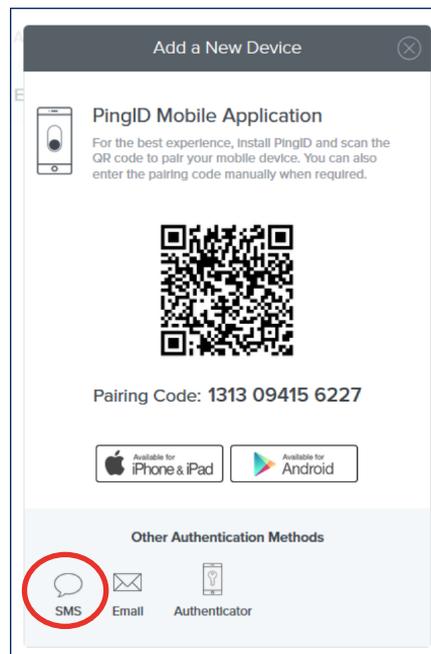
When you click on 'Continue' an 'Authentication' pop up is displayed advising that an email with a passcode has been sent to your business email address (the one you use to log in to the portal).



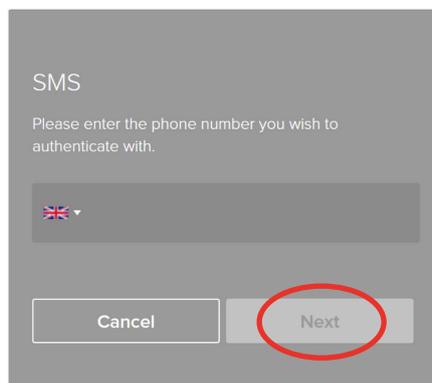
Enter the passcode and click 'Sign On'. Now that you have been authenticated you can add your mobile number this time by selecting 'Add' again.



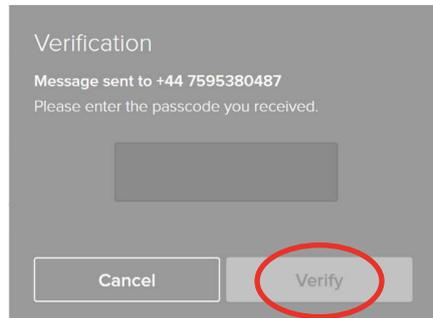
This opens up the 'Add a New Device' pop up.



Click on 'SMS' which opens 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.

