Standard Life
Home Finance

Introduction to getting registered

An easier way to help put your clients in control of a better later life

Let's get started...

To access the connect portal, **click here**. Alternatively, visit the connect portal homepage at **standardlifehomefinance.co.uk** and click on connect portal in the navigation menu. From there, you can either login or create an account.

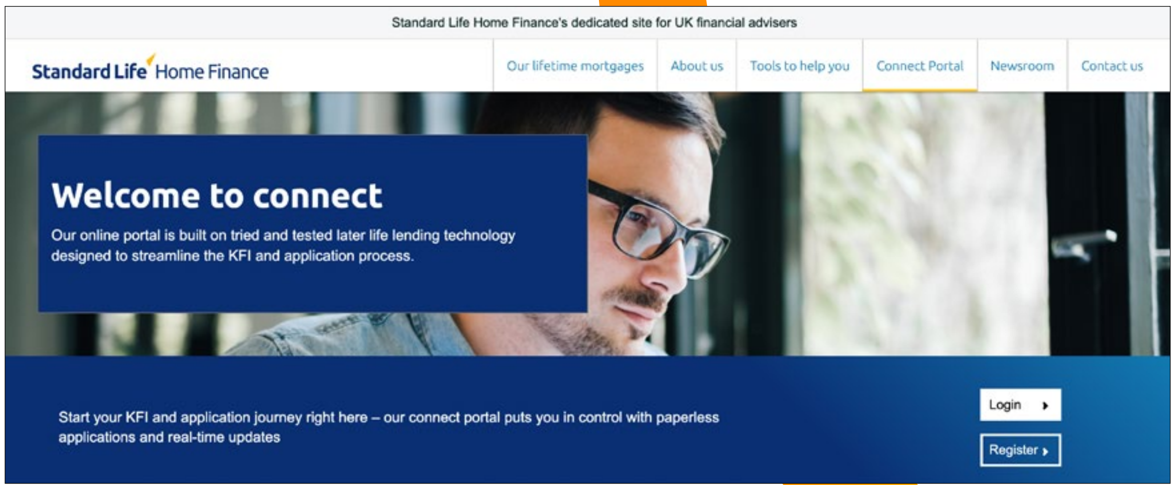
Register for an account

It's easy to register, you'll just need your personal and company details, such as your FCA number. Once you've registered, you'll receive an email from our Adviser Support Team confirming your account is ready and details on how to get in touch should you need them.

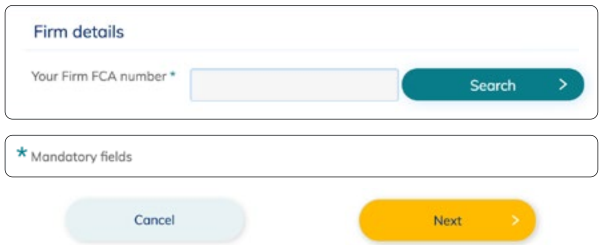
Login to the connect portal

To login, you'll need your username and password. If you've forgotten your password, simply click Forgotten Password? on the screen and we'll guide you through how to reset it.

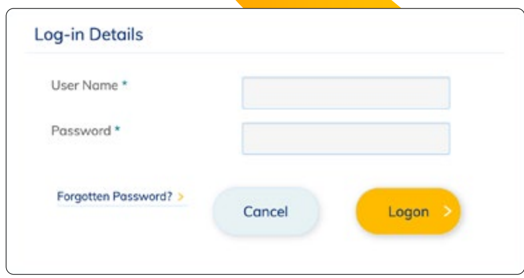
Connect portal homepage



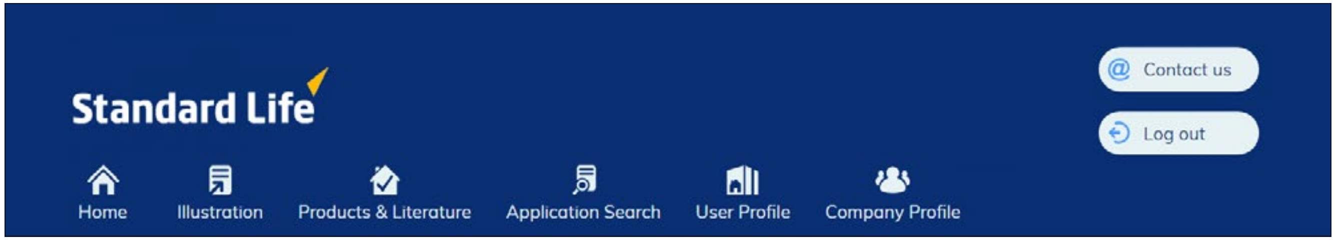
Registration page



Login page



Navigating the connect portal



Connect portal
top navigation bar

Home

This page has a brief introduction on how connect can support you, and any servicing updates can be found under servicing messages. If maintenance is scheduled or we're experiencing any issues regarding the portal, we'll let you know here.

You'll also find recent KFIs and cases here too. These are organised by most recent. To keep this list as clear as possible for you, we advise you take advantage of the amend KFI option whenever you require a second KFI for the same client(s). This can be found within the summary for application page, accessed via clicking the client's case reference number.

Illustration

This is where you can start creating KFIs for your clients. All you have to do is follow the steps and fill in the appropriate client information. Once done, the system will show you the products available to your client and allow you to specify amounts, fees and other details.

Products and literature

This button will guide you back to our website where you'll find everything you need to know about the range of plans we offer, including current rates, LTVs, features, lending criteria and our plan guides.

Application search

Once a case falls off your recent cases, it isn't gone forever. It can be found via our application search function, which lets you find old KFIs, as well as declined and completed cases.

It's simple to use, just provide either your client's surname, postcode or case reference number, and we'll display your saved data from the applicant bank.

User profile

Here you'll be able to manage your account. This includes changing your password, address and contact details. This is also where you can change your submission route list; which allows you to personalise which club you want to assign each case to.

You're able to register with multiple clubs, but each case can only be submitted to one club, which is chosen at KFI stage.

Important information
You must select the correct submission route to ensure that you get paid the correct commission when a case completes. You can check and update your submission route in the **'User Profile'** tab, by selecting **'Change my Submission Route list'**

Company profile

Here you'll find information about the company you're registered with, including the company name, FCA number and the current company address. You can contact us via **info@standardlifehomefinance.co.uk** if any of this information needs updating, such as a change of address.

Logout

You can click this button to leave the portal and log out.

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Find out more

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