Mortgage Pro user roles.

We offer four different roles: supervisor, broker, administrator and case viewer.

Administrator

- Brokers can allocate administrators from the same firm to their cases. This grants the administrator the same access as the broker.
- Multiple brokers can allocate one administrator to their cases.
- Administrators can also receive the same email updates about a case as a broker would.

Broker

- Brokers have full access to create and complete applications and can only access cases that they have created.
- They also self-manage their list of administrators and case viewers.

Case viewer

- Case viewers have read-only access to all the cases belonging to brokers they are linked to.
- They cannot amend cases or upload documents.

Supervisor

- Supervisors have read-only access to all cases under their FCA number, but they can't update them or create their own.
- Users with a supervisor role will be approved by our Panel team and their firm.
- They can transfer cases between brokers (pre submission).