Client Centre – FAQs

Customer

QUESTION	ANSWER
Access	
How do I access the Client Centre?	Your broker will send an invitation to your email address which will have your Username, Password and a **link** for you to access the centre. If you need to reset your password, please use the 'Forgot password' link.
What is the Credit Guide document that was attached to my invitation; do I need to read this?	Yes. A Credit Guide sets out important information about the services that are provided by a licensed broker, any fees and commission payable to them, their responsible lending obligations, and their internal and external dispute resolution procedures and how you can access them. Your broker is required to provide this Credit Guide to you as soon as practicable after it becomes apparent that they are likely to provide credit assistance to you.
Notifications	
How do I know if I have a notification from my broker that I need to action?	There will be a red dot next to the Bell symbol (see below) in the top banner. Click on the bell to view the notification.  New items will have a red dot on the right-hand side and will disappear/reappear as you click on the update.

Chat Function	
How do I communicate with my broker with any questions I may have about the Client Centre, completing a Questionnaire or uploading Documents?	Click on the Chat bubble symbol (see below) in the top banner to access the chat function with your broker.  Then click on your brokers name to access the conversation chat box. A red dot will appear next to the Chat bubble symbol when you have a new message from your broker to read.
Dashboard	
What is the Latest Updates section for?	This will provide a summary of all the recent updates/changes made to your Client Centre, including notifications about new questionnaires your broker has sent for you to complete. New items will have a red dot on the right-hand side and will disappear/reappear as you click on the update. This can be used as a handy reminder list of items to complete.
When will I be able to view my current application?	As soon as your broker enters the new application into their software, it will appear in the Applications section of the Dashboard. This can be accessed directly from the dashboard by clicking on any part of the details under Applications; or by clicking on Applications on the left-hand side menu bar.
What information can I view about my application?	You will be able to view the following details for all existing and new applications: • **Lender** – The bank you have selected to submit your application to • **Total Amount** – The total loan amount being requested

	• **Applicants** – Who is applying for the loan • **Status** – Will provide the stage your application is currently at. • **Statement of Credit Assistance** – A document that includes a summary of your application objectives and requirements, details of the recommended product/s and any associated fees, etc. • **Last Updated** – The date that your application was last amended.
Questionnaires	
How do I access the questionnaire my broker has asked me to complete?	You can access this by clicking on Questionnaires on the left-hand side menu bar, and then selecting the most recent survey.
Why are some details pre-filled?	Your broker may have already entered some details that they have already collected from you. These can be amended/updated throughout the process as required.
What do I do if I can't answer all the questions, or if I need to come back and finish it later?	No problems. Your responses will be saved along the way, so if you need to leave and return later you can just continue the conversation from where you were up to.
Why can I only edit certain fields / responses?	Where a response may impact a follow up question, you will not be able to edit your original response. Please advise your broker of the information that needs to be updated. You may wish to use the Chat function for this.
Can I provide information for my co-applicant?	Absolutely. If the information being provided is current and correct, you can provide these details.

Profile	
Why can't I see any information under my profile yet?	The questionnaire must be completed in full before your responses are able to be viewed in your Profile tab. Any information the Broker has already entered, will be viewable straight away.
I need to make some changes/add to my details; can I edit the fields on this tab?	No. Any changes outside of a questionnaire will need to be made by your broker. Please inform them of any relevant updates.
Applications	
Why isn't my application showing in the Client Centre yet?	Your broker will create an application for you after they have confirmed your details and discussed all the credit options available to you.
I have chosen my lender and product – can I review my current application now?	Yes. Once the chosen lender/product has been confirmed, your broker will enter the application in their software, and you will then be able to view the details under Applications on the left-hand side menu bar.
Documents	
My broker has asked me to send through some documents to them. How do I send these via the Client Centre?	Firstly, your broker needs to submit a request for documents for you to provide via the Client Centre. Once you have received this and have logged in, click on the Documents tab on the left-hand side menu bar. The documents your broker has requested will appear here. Either click a field to select a file and upload it to the applicable section, or you can drag and drop into the required field.

	The field will turn green and state "Complete" to confirm it has been uploaded and sent to your broker.
What documents file types can I upload and what is the maximum size these can be?	File documents, PDF's and images are all acceptable. Max size per file: 50MB
Help	
How do I access the video tutorial again?	This is located under **Help** on the left-hand side menu bar.
I need some help using the centre are there any FAQ's I can read?	Yes! There are some frequently asked questions available under **Help** on the left-hand side menu bar – titled "**Customer FAQ's**".
Contact Us	
Can I email my broker through the Client Centre?	Yes. You can click on your broker's email address – under the Contact Us tab on the left-hand side menu bar –and an email message box will appear. Simply enter a subject and your text into the message field. Once complete – click **Send**.