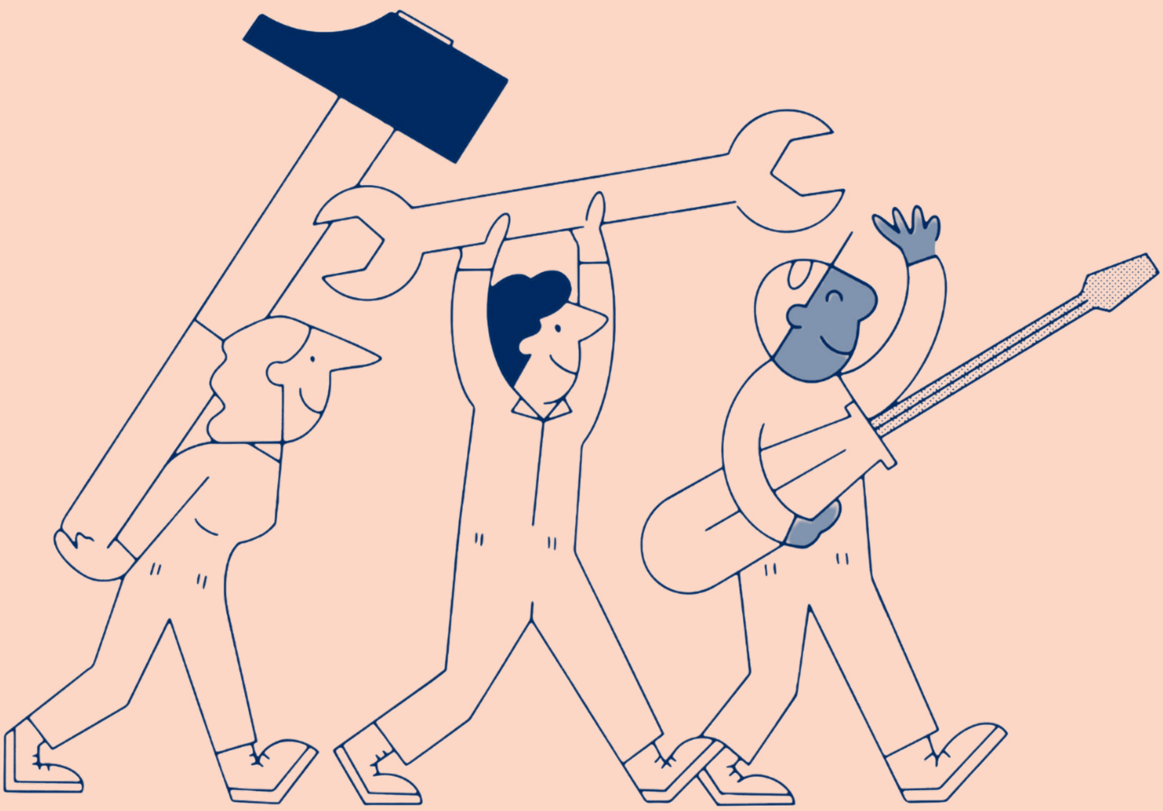
Plenti

Referring to the portal

user guide



When to refer to the portal

Obtaining a quote

The quote at the start of our application journey does a soft check of the clients credit file to give you an accurate rate and repayment for your client before you submit the application.

Quotes can be obtained either via a RateEstimate in the ‘new application’ section or via the automotive quote function in the ‘tools’ section of the portal.

Comparing a personal loan against other finance options

In the ‘tools’ section of your portal you have access to our free calculators:

- Debt consolidation calculator
- LMI saver calculator
- Mortgage redraw calculator

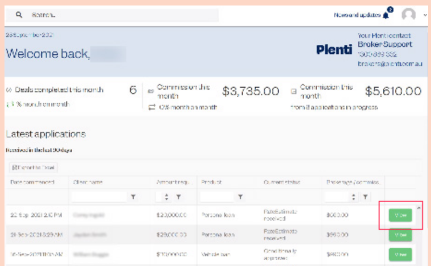
Settling an auto loan

You can upload all settlement documents in the ‘view loan conditions’ section on the application. You can also track the status of the documents uploaded to see if they have been received and verified by settlements and credit. Once everything is verified you don’t need to provide anything else; we will generate and send contracts to be signed by your client electronically.

Uploading documents

All documents for credit and settlements should be uploaded through the broker portal for quicker turnarounds and a better Plenti experience.

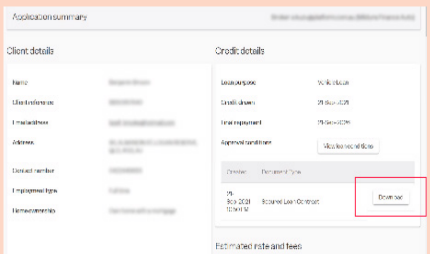
You can go into any live deals via the ‘view’ button located on the right hand side of the home page. Once you’re into the deal you can scroll down to the ‘upload a document’ section.



Downloading loan contracts

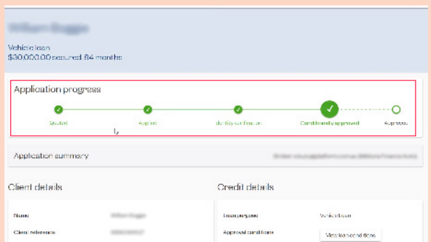
Once a loan has drawn down with us you will have access to download the loan contract.

Simply select ‘view’ on the right hand side of of the home page and on the right hand side, you will see a document to download in the ‘Credit details’ section.



Checking deal status

Once you are in the ‘view’ section of a deal you will see a timeline at the top of the deal that will provide you with current deal status.



Live chat now available in your broker portal

Providing you easy access to our onshore broker support team, this is the quickest way to get a response.