Broker Portal **Statuses**

Broker portal statuses: What they mean for you

Your Broker Portal now provides real-time visibility into all your applications, making it easier to track progress, take action, and keep deals moving. Each status reflects where an application stands in the process, so you always know what is happening and what is needed.

This guide explains the different statuses you will see, what they mean, and how to respond. This will help you streamline submissions, reduce delays, and get clients approved faster.

Stage: Indicates where the deal is

Quote	Customer details are entered and an indicative quote is provided
Application	Submit a loan application on behalf of your client
Conditionally approved	The application has been conditionally approved, subject to additional documents or information
Approved	The loan is unconditionally approved
Complete	The deal has settled, and the customer has received their funds
Declined	The loan application has been declined

Status: Represents the progress of each stage

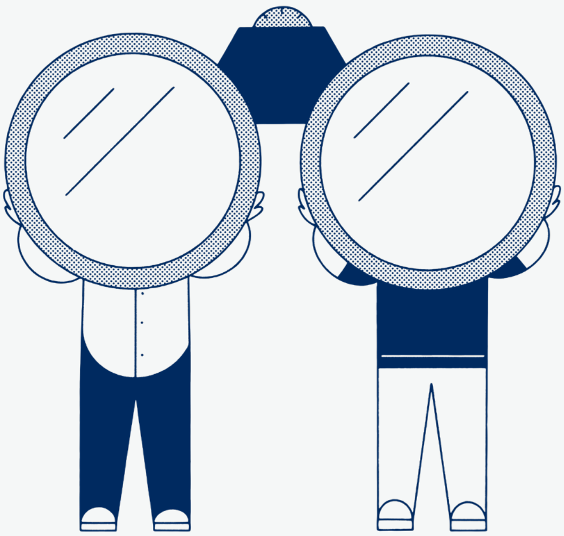
Quoted	Quote received
Incomplete	More details are required to progress the application
Awaiting review	The application is in the queue for review
Documents requested	Additional documents are required
Under review	The credit team is reviewing the application
Declined	The application has been declined
Approved	The application has been unconditionally approved
Complete	The deal has settled
Expired	The deal has expired and is no longer valid
Cancelled	The application has been cancelled

Action: Indicates what Plenti or the broker must do to move the deal forward

Confirm quote details	**Who**: Broker **Action**: Confirm quote details
Complete application	**Who**: Broker **Action**: Submit customer details to complete application
Upload documents	**Who**: Broker **Action**: Upload documents
In queue for document review	**Who**: Plenti **Action**: Review customer documents
Additional documents requested	**Who**: Broker **Action**: Additional documents are required to progress the application
In queue for credit assessment	**Who**: Plenti **Action**: Credit team to assess the application
Credit assessment has begun	**Who**: Plenti **Action**: The Credit team is assessing the application
In queue for credit verification	**Who**: Plenti **Action**: The credit team will verify the information provided
In queue for settlement	**Who**: Plenti **Action**: Settlements team to assess
Notify customer to finalise contract	**Who**: Broker **Action**: Notify the customer the contract has been issued (via email by Plenti)
Credit drawn	The deal has settled, no action required

Need a hand?
We're here to help

Contact broker support
Phone: 1300 889 332
Email: brokers@plenti.com.au



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