# CommBank Alpha™

## Asset Finance Broker Portal

### Broker User Manual

September 2024

# Contents


**Welcome** 3
- 1.1 Application scope 3
- 1.2 Documentation scope 4
- 1.3 New application lifecycle 4

**2. How do I access CommBank Alpha™?** 5
- 2.1 Logging in 5
- 2.2 Troubleshooting 6

**3. How do I quote?** 7
- 3.1 Completing a new quote 7
- 3.2 Download a copy of the quote 8
- 3.3 Copying a quote/application 9
- 3.4 Quoting for multi assets 10
- 3.5 Completing Asset Identifier and Supplier Information 11

**4. Selecting an application type** 13

**5. Adding customer details to the application** 16
- 5.1 Searching existing customer details 18
- 5.2 Creating new parties 19

**6. Uploading attachments** 38

**7. Submitting an application for conditional approval** 39

**8. Accessing application documentation** 41

**9. Search for existing quotes** 42

**10. Generating a payout letter and/or amortisation schedule for an existing agreement** 43
- 10.1 Download copy of payout letter 44

**11. Tracking the status of your application** 45



This document is issued by the Commonwealth Bank of Australia and is prepared for the use of CommBank Alpha™ Asset Finance Broker Portal registered users. The content of this document is strictly private and confidential and may not be copied, replicated, distributed or reproduced in whole or in part to any third party without the express consent of Commonwealth Bank.

Commonwealth Bank of Australia ABN 48 123 123 124 AFSL and Australian credit licence 234945.

# Welcome

**Welcome to the CommBank Alpha™ Asset Finance Broker Portal.**

We have built this portal to make it easier for you to do business with us. With CommBank Alpha™, you will be able to:

- Create quotes for Asset Finance transactions
- Progress a quote to a new Asset Finance application
- View the current status of your Asset Finance application
- Generate most types of contract documentation for your clients
- Generate payout quotes for existing Asset Finance agreements

## 1.1 Application scope

The following Asset Finance applications are available in CommBank Alpha™:

ABCD Applications

- Existing CommBank Commercial Customer
- New to CommBank Customer
- Balloon / Residual Refinance Application
- Replacement Application
- Business Activity Statement

Non ABCD Applications

- Full Application
- New Master Limit Request
- Drawdown under Master Limit Request
- Network Approved Application

The following Asset Finance applications are out of scope and need to be submitted via **AFBroker@cba.com.au**:

- Broker / Broker Firm's own proposals
- Mid-term restructures, including hardship requests
- Lease to Lease residual refinances (Letter of Variation to be completed)
- Revolving borrower under Master agreement (including draw down)
- Progressive Loans

## 1.2 Documentation scope

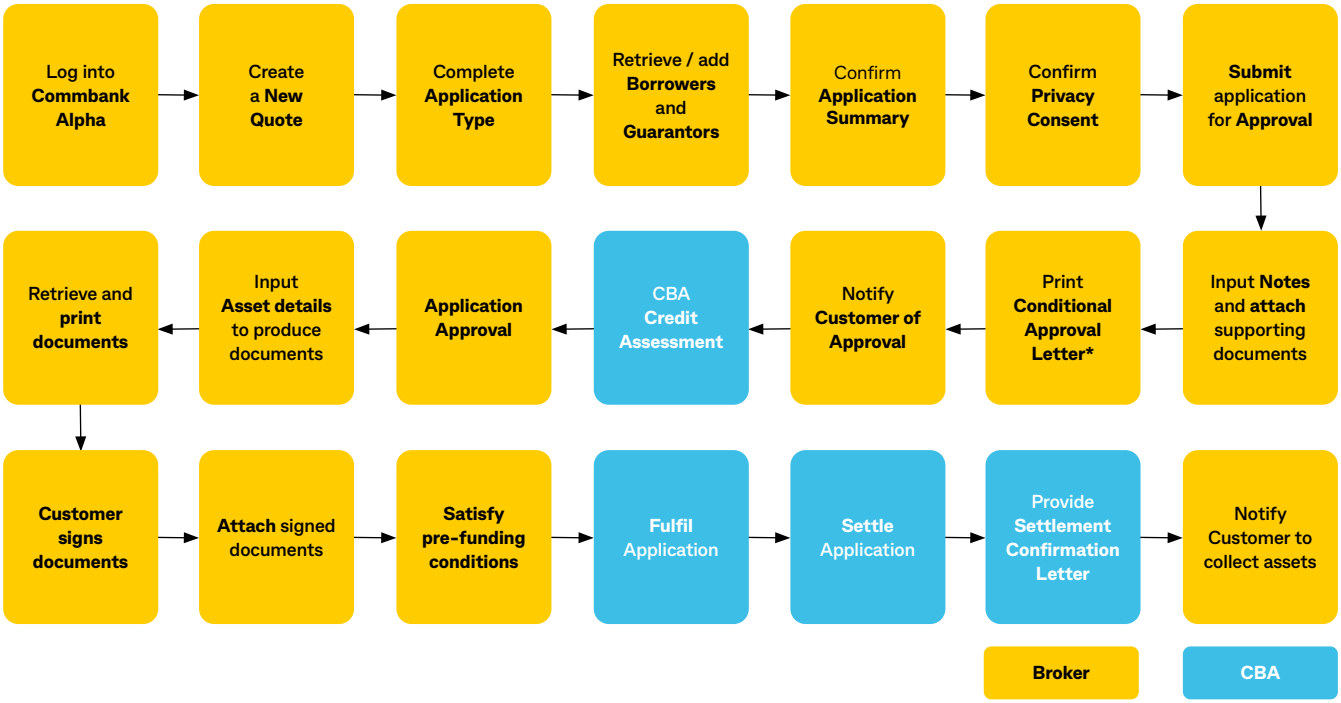
Most transaction types are in scope however the following are excluded and will still need to be documented by CommBank:

- Transactions involving multiple supplier types on one agreement e.g. Private Sale / Recognised Supplier mix
- Transactions involving multiple asset types on one agreement for finance leases only e.g. Commercial Ute and a Heavy Truck on a finance lease
- Transactions involving Guarantors subject to Banking Code of Practice
- Transactions for planes, boats, poker machines or any other assets that require Occupational Health & Safety (OH&S)Checklists
- Transactions involving associations or other entity types that require specialised or non-standard signing clauses
- Establishment of Master Agreements (drawdowns allowable)
- Equipment Construction Facility Drawdowns (Progressive Draws)
- Net Settlements
- Vendor & Agency Transactions
- Lease to Lease residual refinances (Letter of Variation to be completed)
- Broker / Broker Firm's own proposals
- Revolving borrower under Master agreement (including draw down)
- Mid-term restructures, including hardship requests

To ensure that your Settlement is processed without delay, please ensure that all relevant documents are scanned and attached to CommBank Alpha™. Relevant documents include, but are not limited to:

- Executed Documents (including Loan Schedule)
- Supplier Invoice
- Brokerage Invoice (including Doc Fee Rebate if applicable)
- Insurance Policy / Certificate of Currency (if required)
- Funding Instructions
- Settlement Checklists
- All documents required to satisfy Approval Conditions

## 1.3 New application lifecycle



# How do I access CommBank Alpha™?

You can access CommBank Alpha™ at **https://www.commbank.com.au/business/commbank-brokers.html**

CommBank Alpha™ is accessible 7 days a week.

CommBank Alpha™ is designed to be used with the most up-to-date, standard, compliant versions of Google Chrome, Mozilla Firefox, Microsoft Internet Explorer, Microsoft Edge and Apple Safari.

CommBank Alpha™ can be accessed by the above-mentioned internet browsers with no additional software needing to be installed. Functionality will require a device that has the resolution of a Personal Computer (PC) or laptop.

## 2.1 Logging in

As part of your broker accreditation with CommBank, you would have been provided with a username and password to access CommBank Alpha™.

As outlined at time of provision, you are responsible for ensuring that your private log in details are, at all times, kept safely and securely and in accordance with our instructions and are not disclosed to any other entity or person.

Enter your Log In details in the text boxes provided and click Log on.

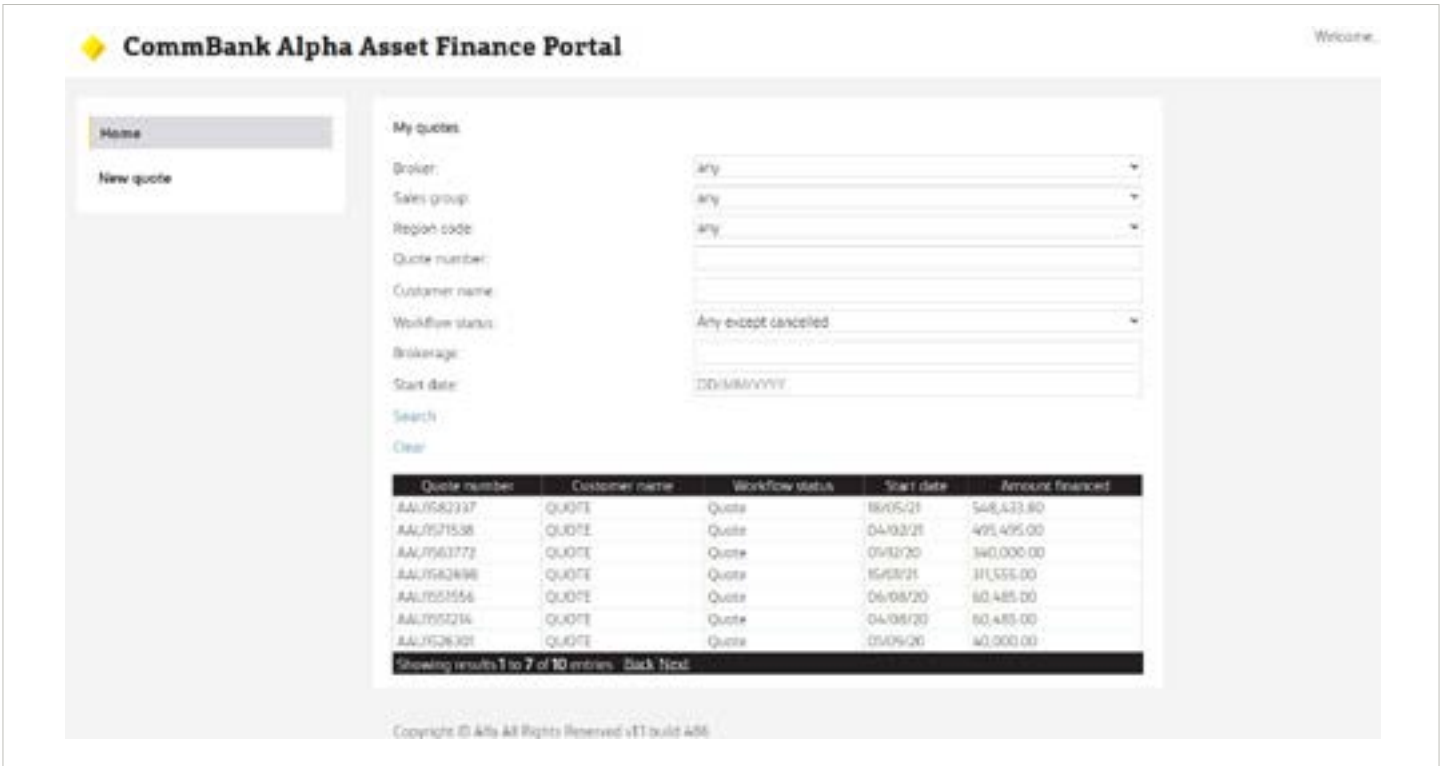
The User Type must always be '**AU**'.

## 2.2 Troubleshooting

For any technical problems accessing the CommBank Alpha™ portal or submitting an application, please call your **Business Development Executive.**

For password resets please call 1800 240 405. Please have your User Name and Staff ID available to input and then Select Option 1. Request support for ALPHA Portal.

Once you have successfully logged into CommBank Alpha™, you will be directed to the below Home Screen.




This page can be used to:

- Create a new quote
- Search for existing quotes or applications that have been submitted by yourself or on your behalf
- View the most recent 50 quotes, applications and/or agreements you have created

**Tip:**

When searching for an existing quote or agreement by 'Customer Name', you will need to ensure that spelling is accurate or no results will be returned.

If searching for an individual, use the first or surname singularly OR search using full name including any middle names (if applicable).

# How do I quote?

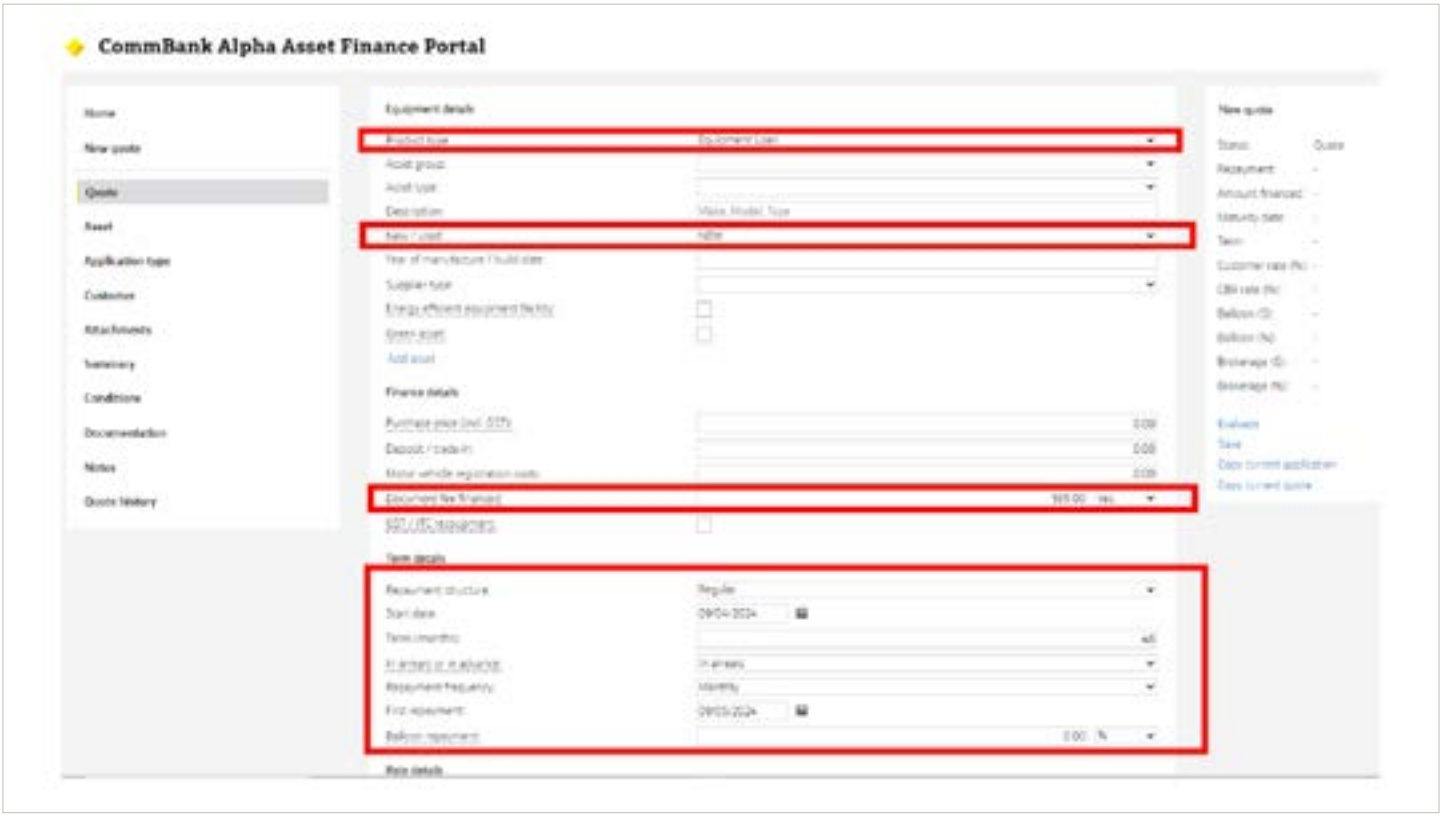
## 3.1 Completing a new quote

1. Click on the '**New quote**' tab.

1. Ensure you review **all** the prepopulated fields and update as appropriate on every quote otherwise the default information will be used:

   Prepopulated fields are:

   - Product Type
   - New/Used
   - Documentation fee financed
   - Repayment Structure
   - Start Date
   - In Arrears/Advance
   - Repayment frequency
   - First repayment



**Tip:**

**'Description'** field – You must include the asset description in this field.

1. **Evaluate** and **Save**. Once all relevant information has been entered always click Evaluate and then click ***Save*** prior to moving to a different tab to ensure your quote is saved.

**Tip:**

**Quote number** – will now be allocated in the top right of screen.
This number will also serve as the agreement number should the quote progress to an application.

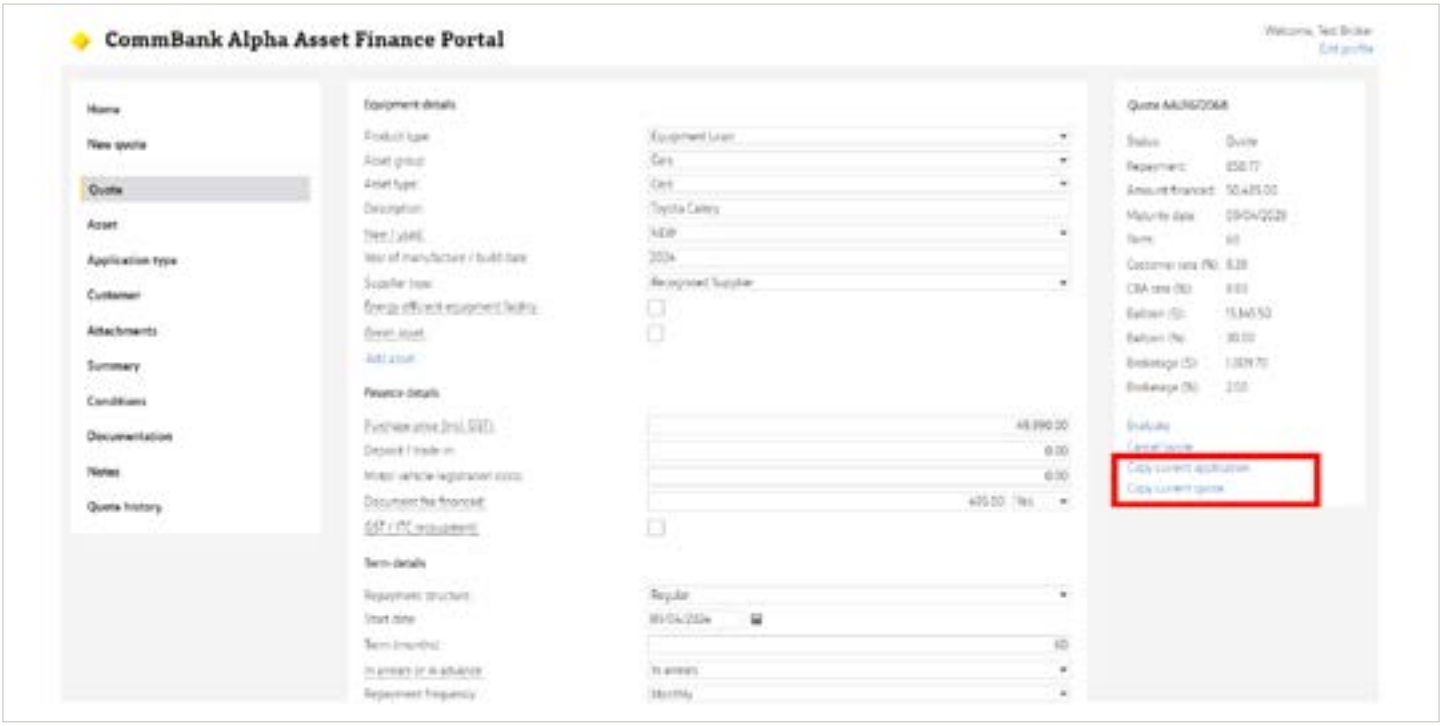
## 3.2 Download a copy of the quote

1. Click on the Documentation tab on the left hand menu.
2. Click on the document titled ***Broker Indicative Quote*** and the download will begin.

## 3.3 Copying a quote/application

In CommBank Alpha™ there are two options available to copy quote details.

You will note on the right hand side of the screen these options:



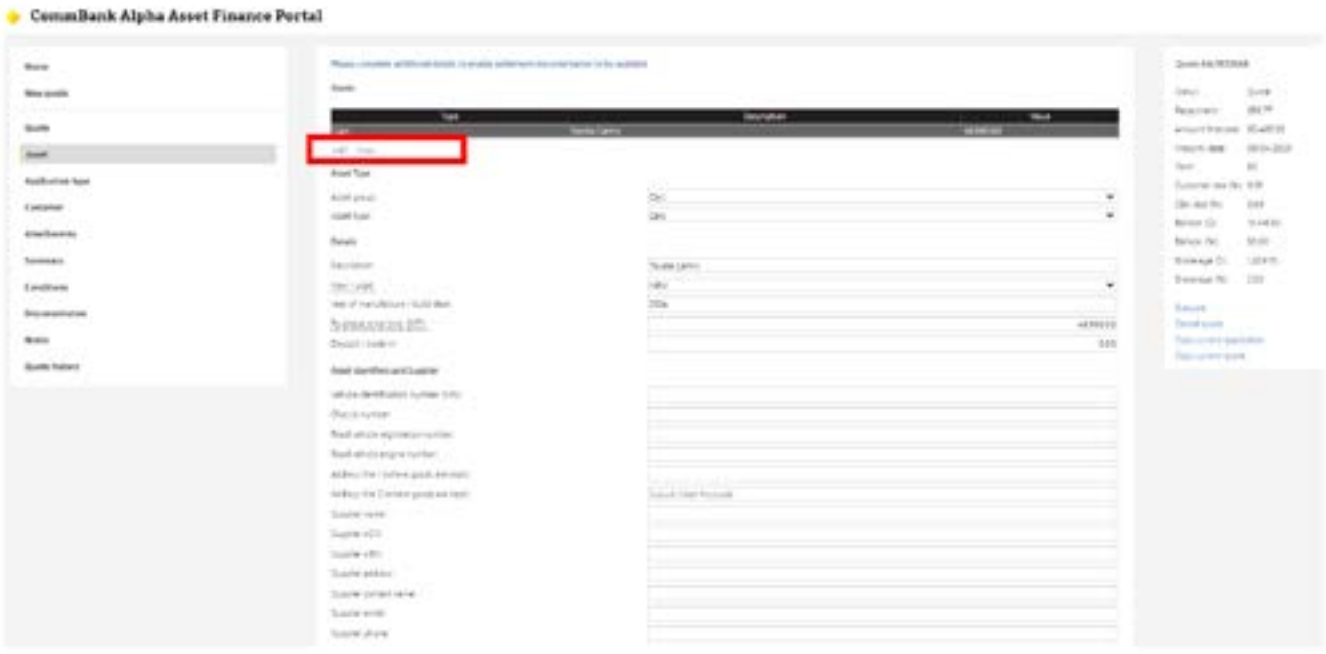

- **Copy current application** means:
  CommBank Alpha™ will keep the current application and create a copy.
  A new agreement number will be created for the copy once you evaluate and save. Changes can be made to the new agreement before submitting.
  For example, this option could be used for customer applications requiring multiple agreements.
- **Copy current quote** means:
  CommBank Alpha™ will only copy the current quote and create a new agreement number.
  No other information will be copied.
  For example, this option could be used to provide customers with a range of quoting options.
- **You can now:**
  Copy a live agreement
  Edit and resubmit an incomplete agreement

**Tip for searching quotes:**

You can also search using the ‘back’ or ‘next’ button below the quote **on the home screen.**

## 3.4 Quoting for multi assets

In CommBank Alpha™ you can quote for multi assets on one agreement subject to assets being the same class and same supplier type.




**Tip for adding or copying a multi asset:**

You can use the ‘Add’ function to add a second asset e.g. trailer to a prime mover or you can use ‘Copy’ to add multiples of the same asset.

## 3.5 Completing Asset Identifier and Supplier Information

**The Asset Identifier and Supplier Information screen can be completed in full either:**

- **Prior to submitting the application for formal assessment OR**
- **Once you have received the formal approval advice**

To complete PRIOR to submitting for assessment:

Click on the Asset tab.

1. Complete fields shown for each asset as applicable.
2. Click ***Evaluate*** and ***Save***.
3. ***Upload*** any attachments required.
4. Select ***Submit*** for approval.
5. Once redirected to the Summary tab, review all details of the application and click ***Confirm***.
6. Review privacy consent and click ***Confirm*** to submit the application.

To Complete AFTER receiving the Conditional Approval Advice:

1. Click on the Asset tab.
2. Complete ALL fields shown for the application.
3. Click ***Evaluate and SAVE***
4. Proceed to the “Documentation” Tab to locate your documents

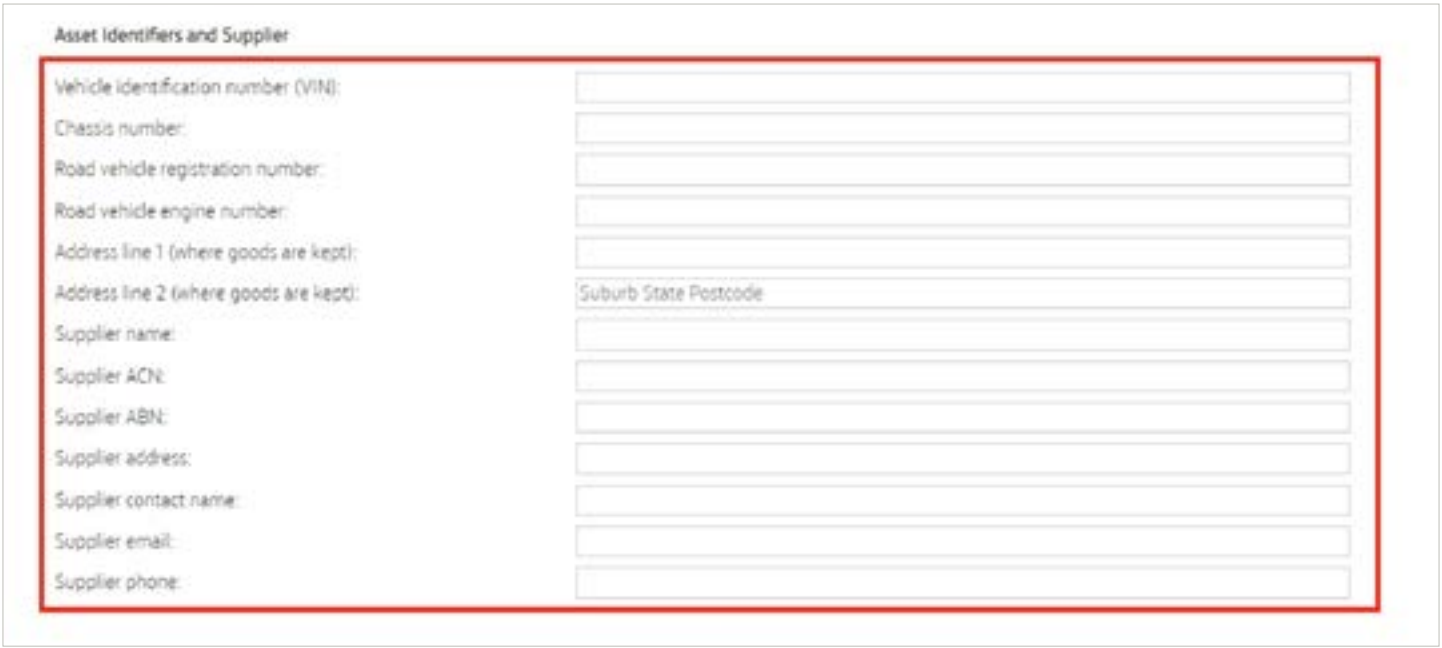
**Tip:**

**Where the supplier does not have an A.C.N. load 9 Zeros ie: 000000000**
**Where the supplier does not have an A.B.N. load 11 Zeros ie: 00000000000**

***Reminder:***

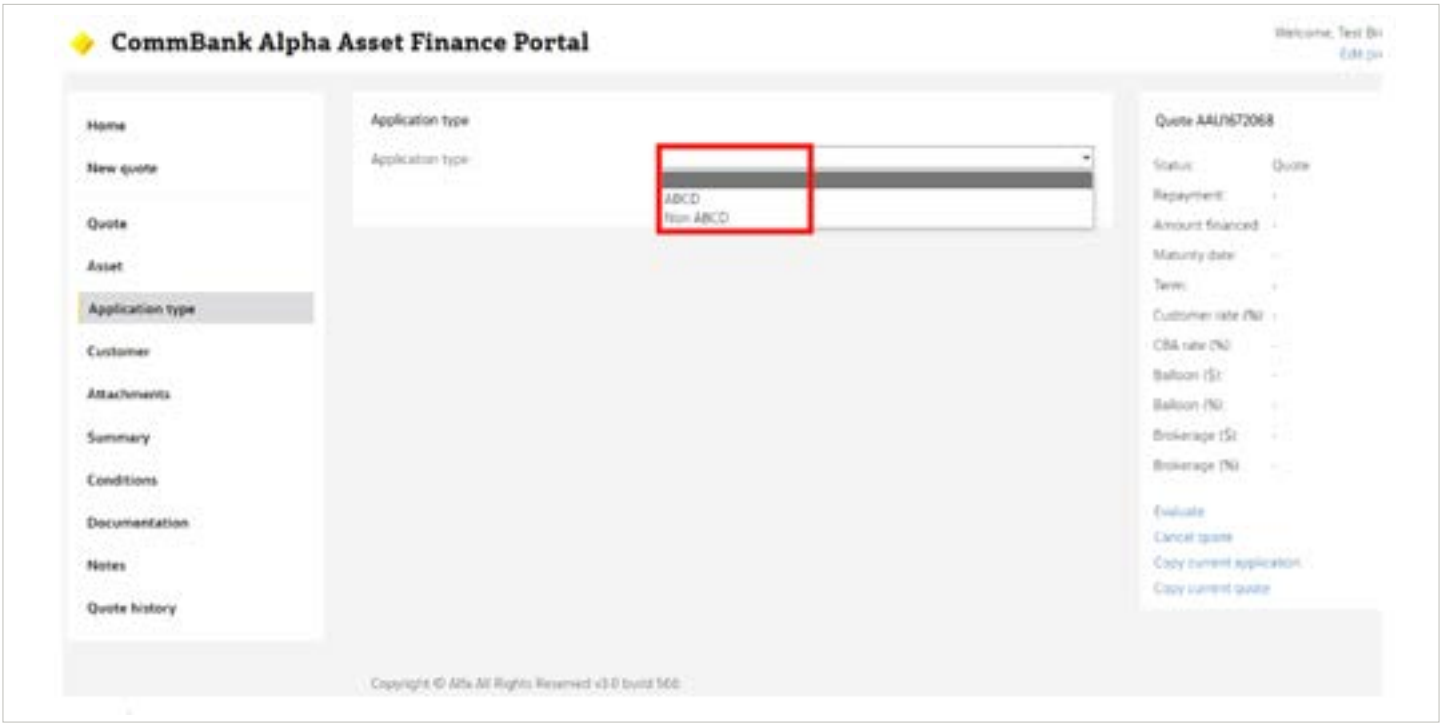
CBA will need to complete documents in the following instances:

- Transactions involving multiple supplier types on one agreement e.g. Private sale / Recognised supplier mix
- Transactions involving multiple asset types on one agreement for finance leases only e.g. Commercial ute and heavy truck on a finance lease
- Transactions involving Guarantors subject to Banking Code of Practice
- Transactions for planes, boats, poker machines or any other assets that require Occupational Health & Safety (OH&S)Checklists
- Transactions involving associations or other entity types that require specialised or non-standard signing clauses
- Establishment of Master Agreements (drawdowns allowable)
- Equipment Construction Facility Drawdowns (Progressive Draws)
- Net Settlements
- Vendor & Agency Transactions
- Lease to Lease residual refinances
- Broker / Broker Firm's own proposals
- Revolving borrower under Master agreement (including draw down)
- Mid-term restructures, including hardship requests

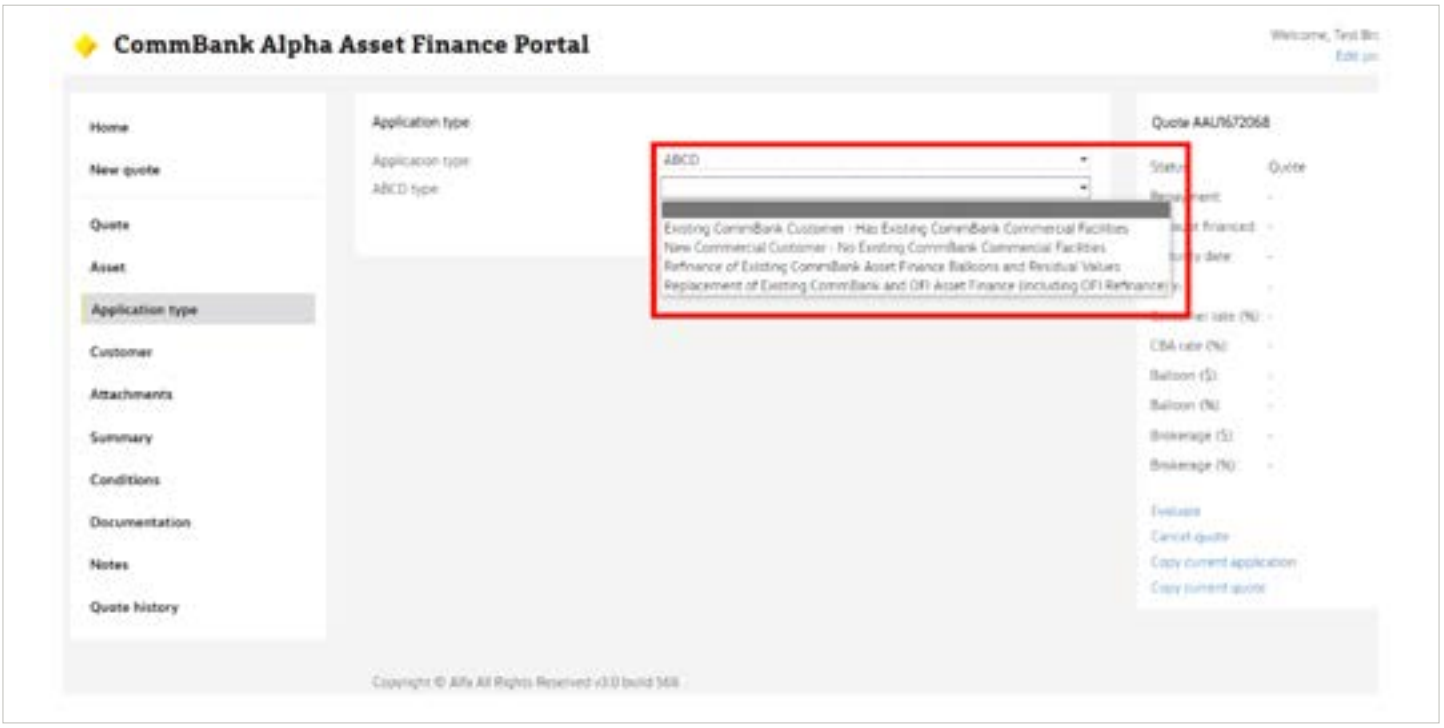


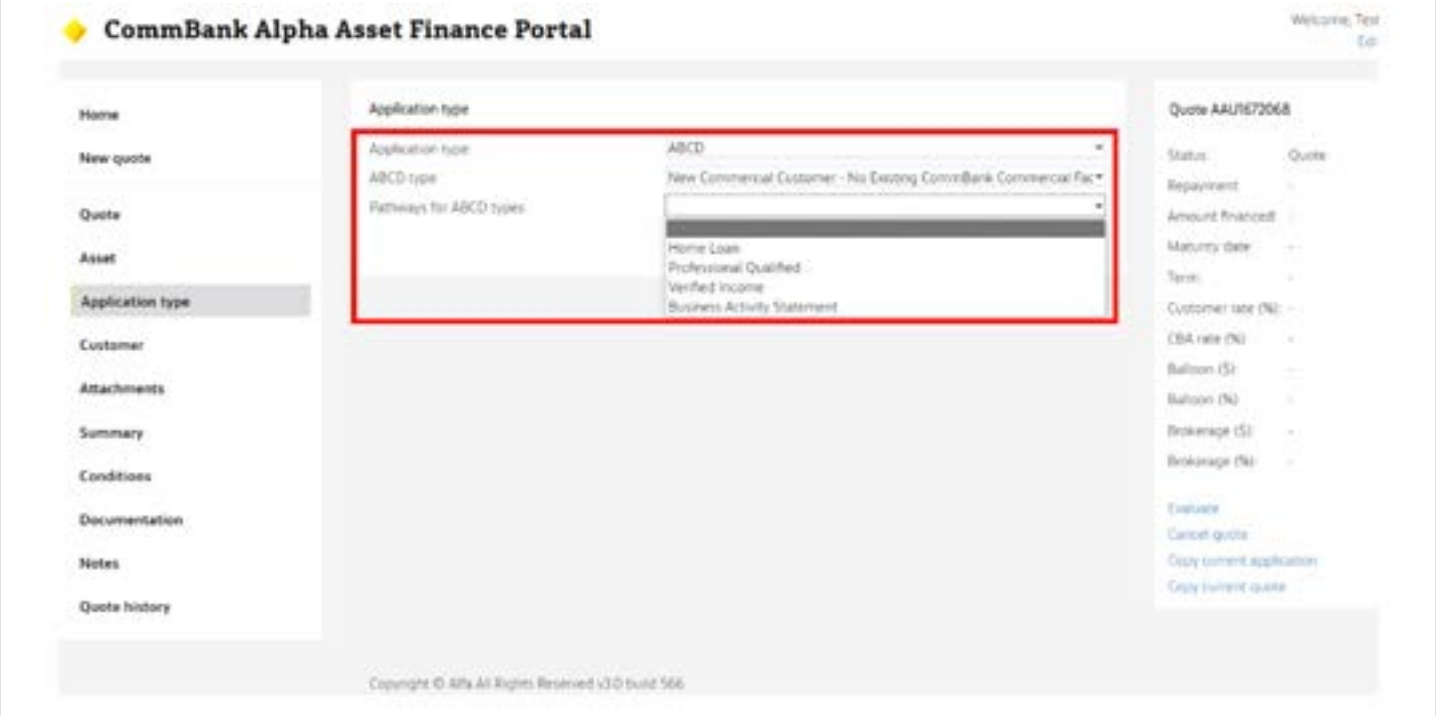
# Selecting an application type

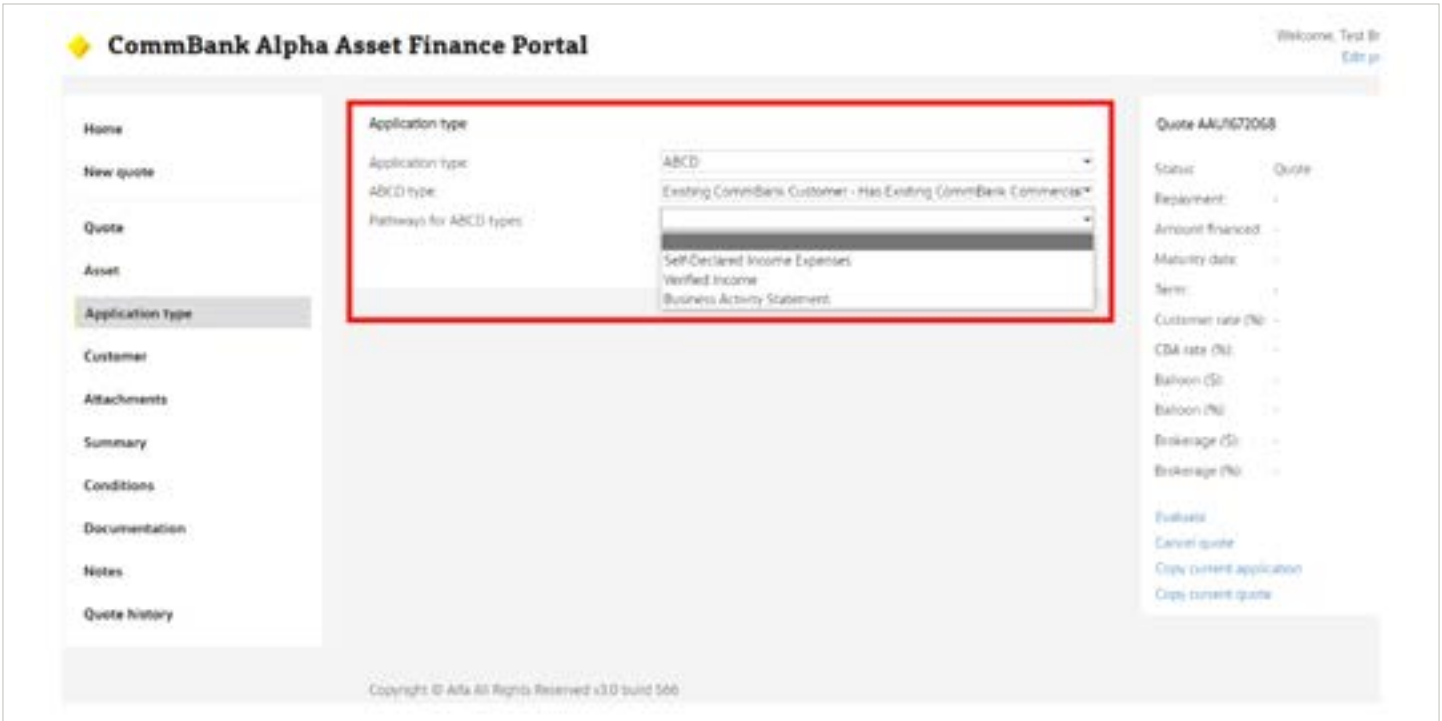
1. Click on the **Application type** tab.
2. Select an Application type and Pathways for ABCD types options from the drop down menu.




a. **ABCD Application type:**

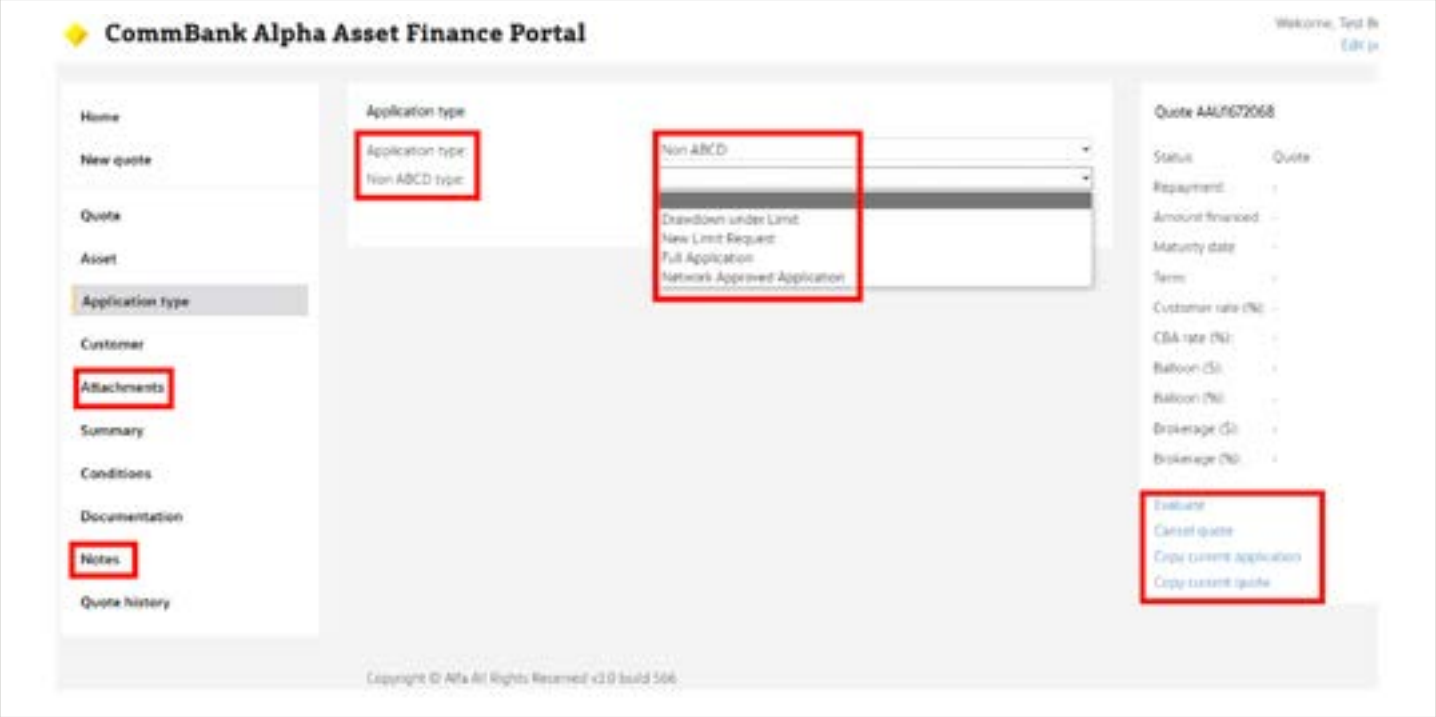





i. Select the **ABCD Application type** from the drop down menu.
ii. Select the **Pathways for the ABCD types**.
iii. **Important information** regarding the transaction type and the criteria required to be met will prepopulate.
iv. Review this information and answer the **Qualifying criteria** questionnaire that follows.
v. Once complete, click ***Evaluate*** and then click ***Save***.

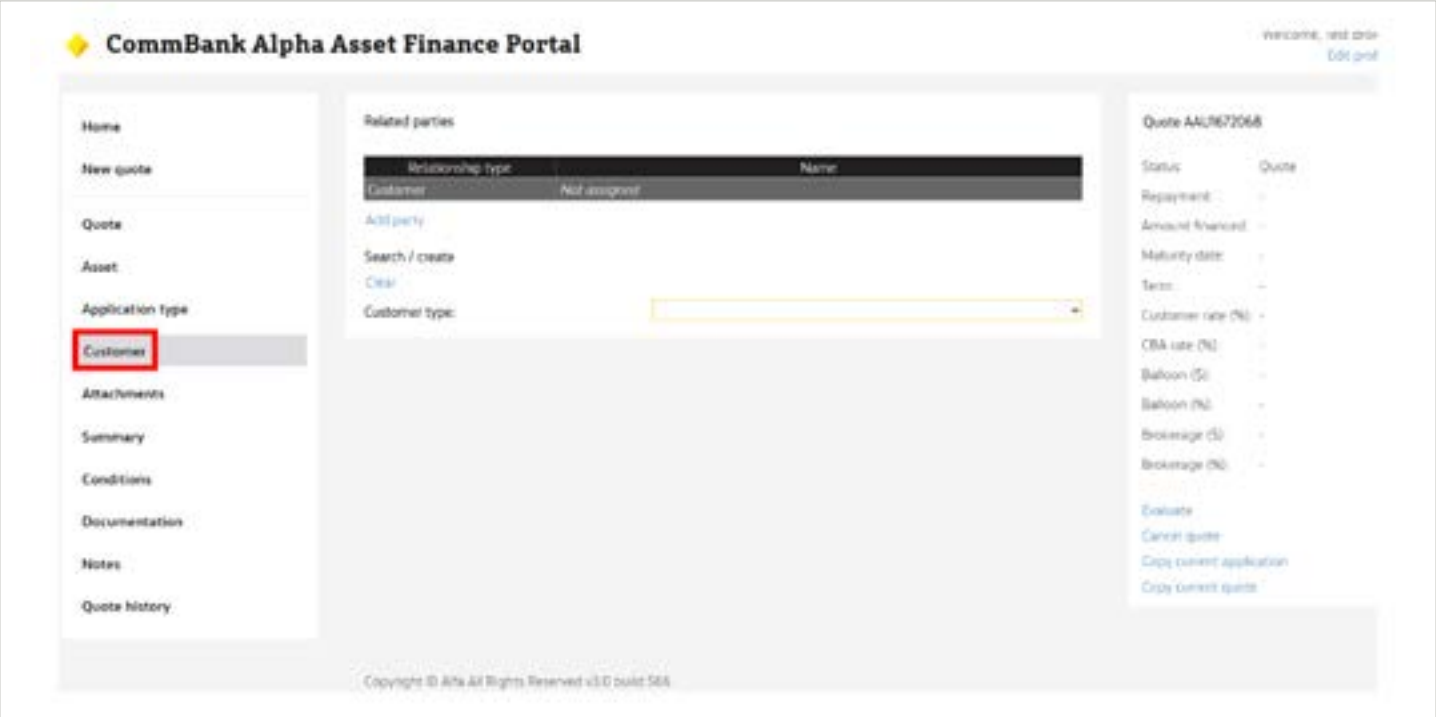
b. Non ABCD applications (Drawdown under limit, New Limit requests, Full applications):




i. Select the **Non ABCD type** from the drop down menu.
ii. Navigate to the left hand menu and use **Attachments** tab to upload application information and the **Notes** tab to add any notes required.

# Adding customer details to the application

Click on the **Customer** tab to access the below screen.
This screen will be used to enter all of the parties related to the loan application.




**There are some important things to know before you commence the search process which is detailed in Section 5.1 below**.

Where a borrowing structure includes more than one party, CommBank Alpha™ will require parties to be searched and added in a specific order to ensure documentation is produced correctly.

To support the creation of the borrowing structure, the table below provides some examples of the order in which you will need to search and add a party to the transaction.

**Tips:**

Completing an ABN search for sole traders and partnerships will be of assistance in establishing customers in CommBank Alpha™.

You can use the Government provided **ABN Lookup** which is a free public view of the Australian Business Register (ABR). It provides access to publicly available information supplied by businesses when they register for an Australian Business Number (ABN).

| Entity Type | Borrowing Structure | 1st Search (Customer) | 2nd Search (Account Holder) | 3rd Search (Account Holder) | Borrower details that appear on agreement |
|---|---|---|---|---|---|
| Company atf Trust t/as | ABC Pty Ltd as trustee for ABC Trust trading as ABC Trading | ABC Trust | ABC Pty Ltd | (ignore the trading name*) | ABC Pty Ltd as trustee for ABC Trust |
| Company atf Trust | ABC Pty Ltd as trustee for ABC Trust | ABC Trust | ABC Pty Ltd | n/a | ABC Pty Ltd as trustee for ABC Trust |
| Individual atf Trust | John Smith as trustee for JS Trust | JS Trust | John Smith | n/a | John Smith as trustee for JS Trust |
| Individual t/as | John Smith trading JS Plumbing | Search applicants ABN. Ensure name selected/ created is the 'Entity Name' and 'Entity Type' as per an ABN Lookup search. | John Smith (search individual name) | (ignore the trading name) | John Smith trading John Smith |
| Individual | John Smith (with ABN)* | Search applicants ABN. Ensure name selected/ created is the 'Entity Name' and 'Entity Type' as per an ABN Lookup search. | John Smith (search individual name) | n/a | John Smith trading John Smith |
| Partnership** t/as | John Smith and Linda Smith trading as Smith Family Plumbing | Search applicants ABN. Ensure name selected/ created is the 'Entity Name' and 'Entity Type' as per an ABN Lookup search. | John Smith (search individual name) | Linda Smith (search individual name) | John Smith and Linda Smith trading as 'Entity Name' |
| Individual (PAYG) | John Smith (no ABN) | John Smith | n/a | n/a | |

*If you are doing a draw down under a limit you must include all parties named in the Master Agreement (or approval advice), including any trading name.

**For new applicants that involve a formal documented partnership please contact your Business Development Executive for assistance.

**For other structures please contact your BDM if assistance is required.**

**Tips:**

**Guarantors:** guarantors are added to an application in the order they are to appear on the documents. E.g. if the guarantor is 'ABC Pty Ltd atf ABC Trust' enter the company first and then trust. Individual guarantors should always be entered after any non-individual guarantors.

**Sole Traders:** for the purpose of CommBank Alpha™ all sole trader individuals who generate business income will need to be established as trading in their own individual name. Refer table above for example.

For best results, search as follows:

| Customer type | Search |
|---|---|
| Trust | ABN |
| Company | ACN |
| Business Name | ABN |
| Partnership Name | ABN |
| Sole Trader | ABN |
| Individual | First name, surname and a date of birth(no middle name) |

When searching individuals, you will need to enter a first name, surname and a date of birth before the search button will appear. Do not include a middle name in the search.

Where the search returns more than one individual with the same first name, last name and date of birth, you will need to select the customer with the most accurate address. If the addresses are identical, you will need to select the customer in the first row of the search results.

## 5.1 Searching existing customer details

To add customer details to the application, you will need to first search to confirm if the details are already available in CommBank Alpha™.

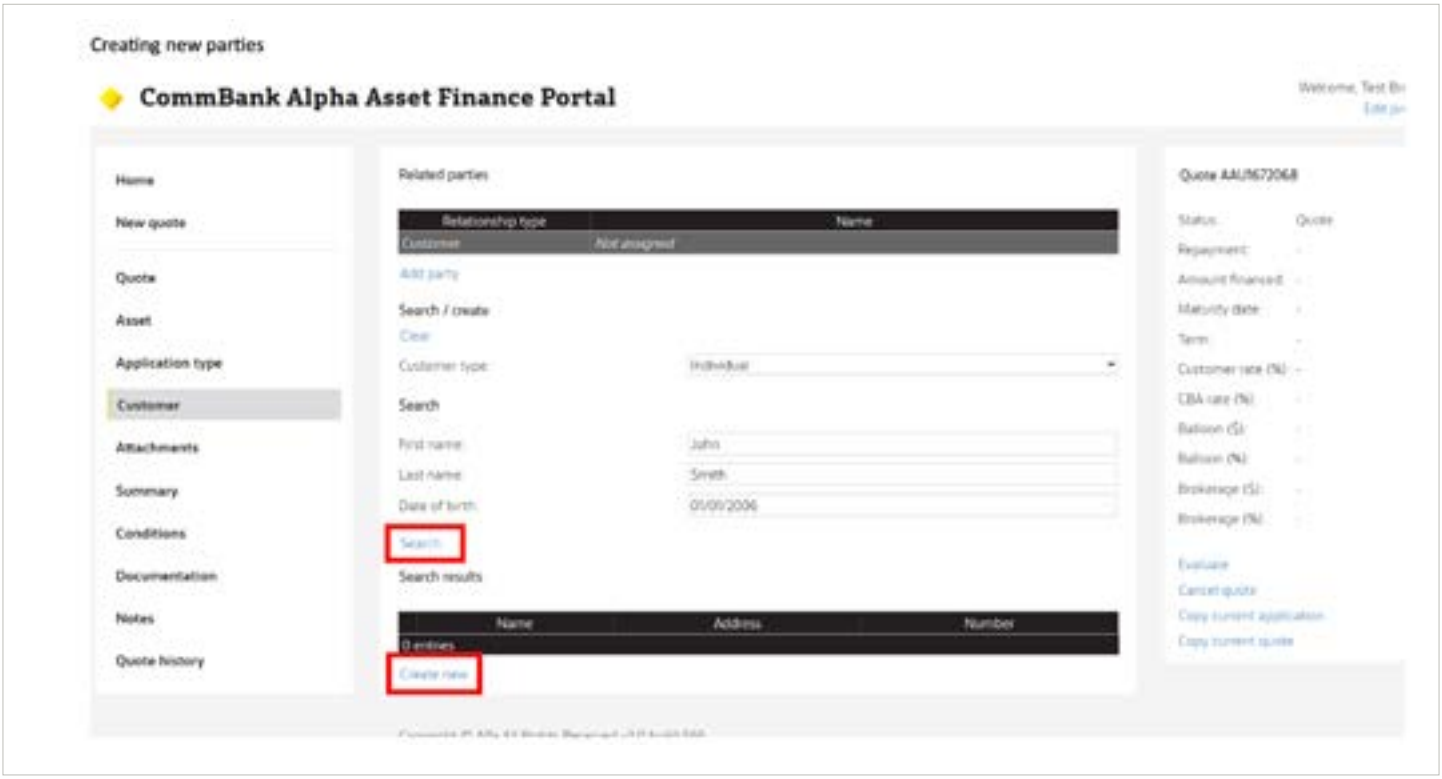
1. Select a **Customer type** and enter the details of the party who appears last in the borrowing structure.
   For example: ABC PTY LTD as trustee for ABC Trust
   Enter the ABN for ABC Trust in the field provided and click **Search.**
2. Where the relevant customer details are returned, click on the name to add them to your application **OR** if the correct result is not returned, refer to '5.2. Creating new parties' to create a new party.
3. Repeat this process for all parties to your application following the search order detailed above.

## 5.2 Creating new parties

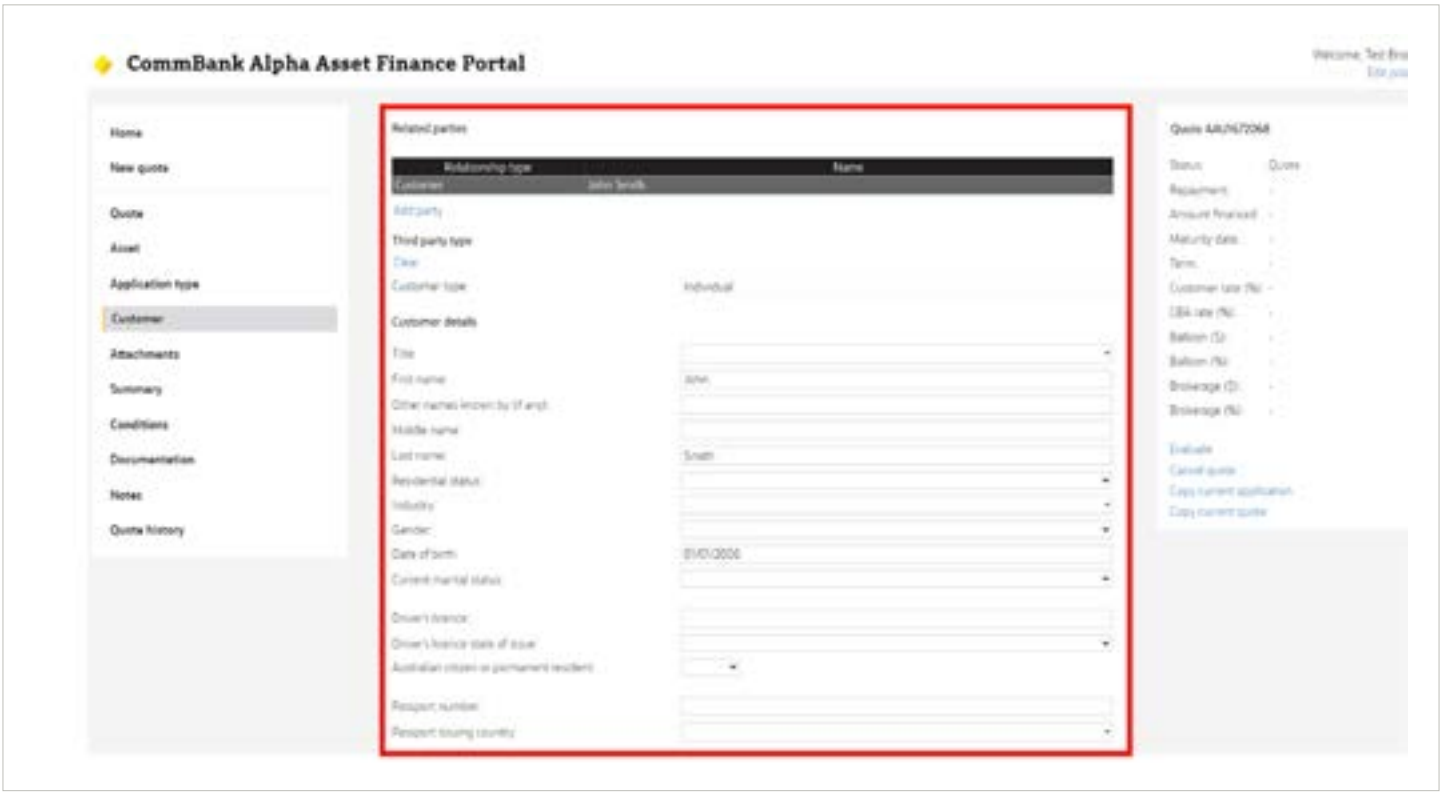
**Note:** These steps will apply once a search of the existing records has been completed. Create new button will not appear prior to this.

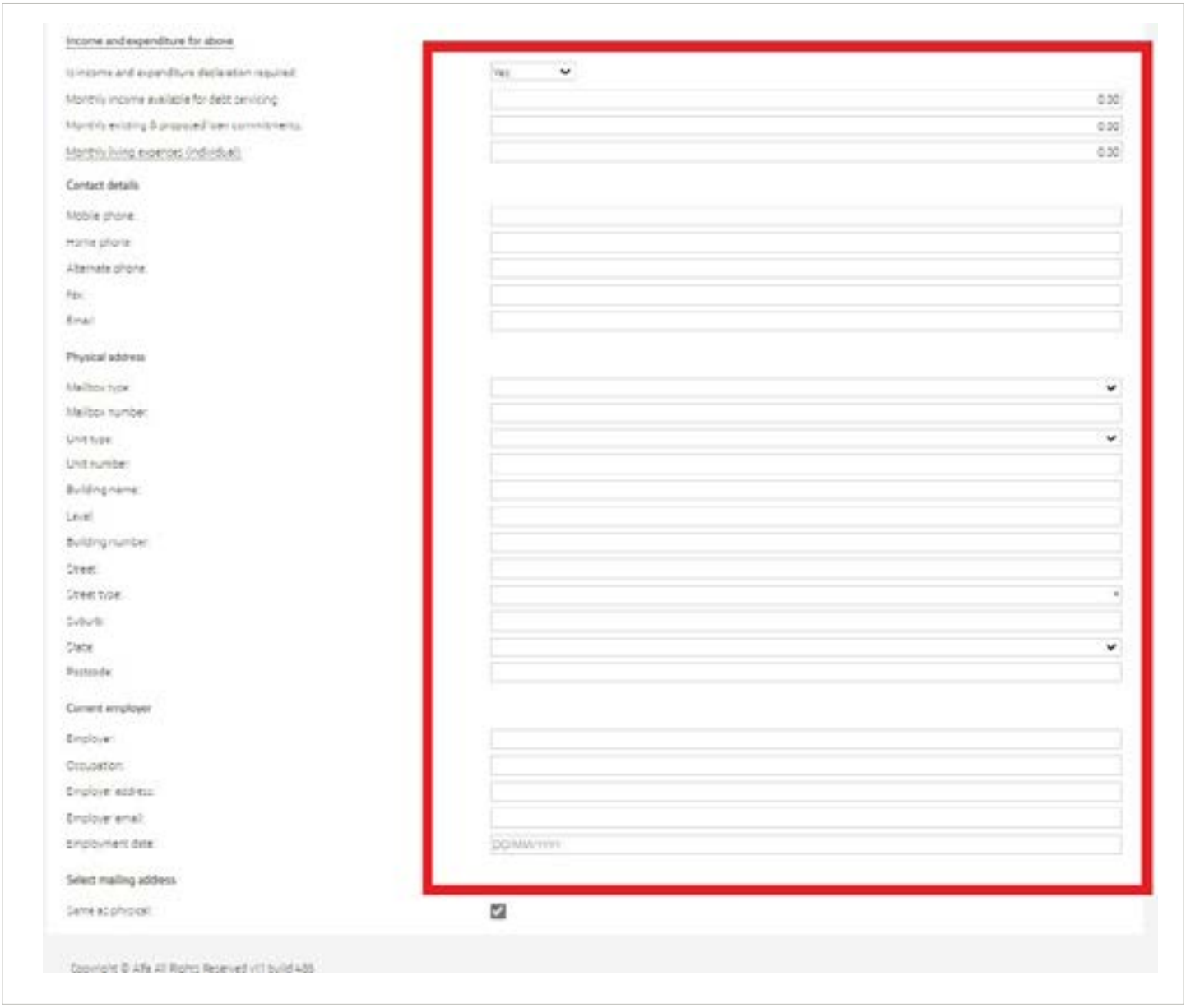
To create an **'Individual'** party:

1. Click on ***Create new*** button.




1. On the next screen, complete all fields, including Customer Details, Income and expenditure for above, Contact Details, Physical Address, Current Employer and Select mailing address.





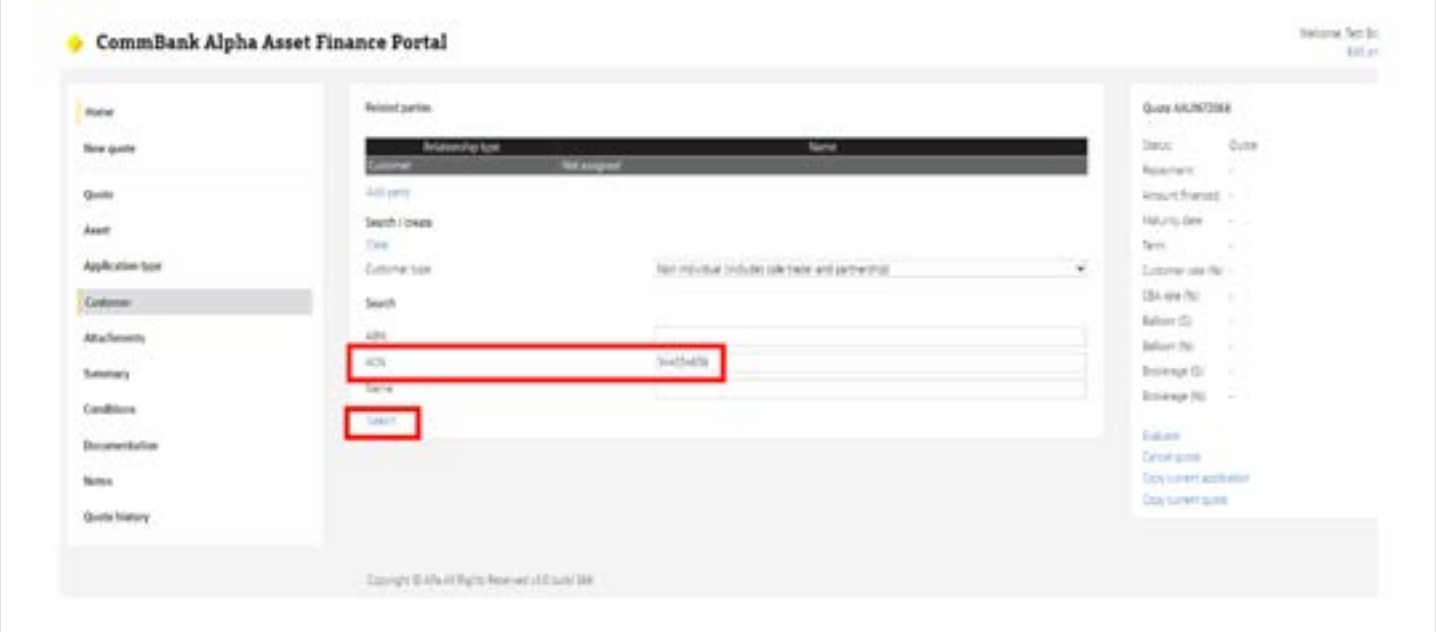

ⓘ All fields are crucial as they are required for Anti Money Laundering & Know Your Customer (AML/KYC).
Income and Expenditure Details must be completed for all New to Bank and Existing Customer application types.

1. Once all fields have been completed, Evaluate the agreement and then click Save.
2. Your individual party will now be noted as the Customer in the table at the top of the screen.

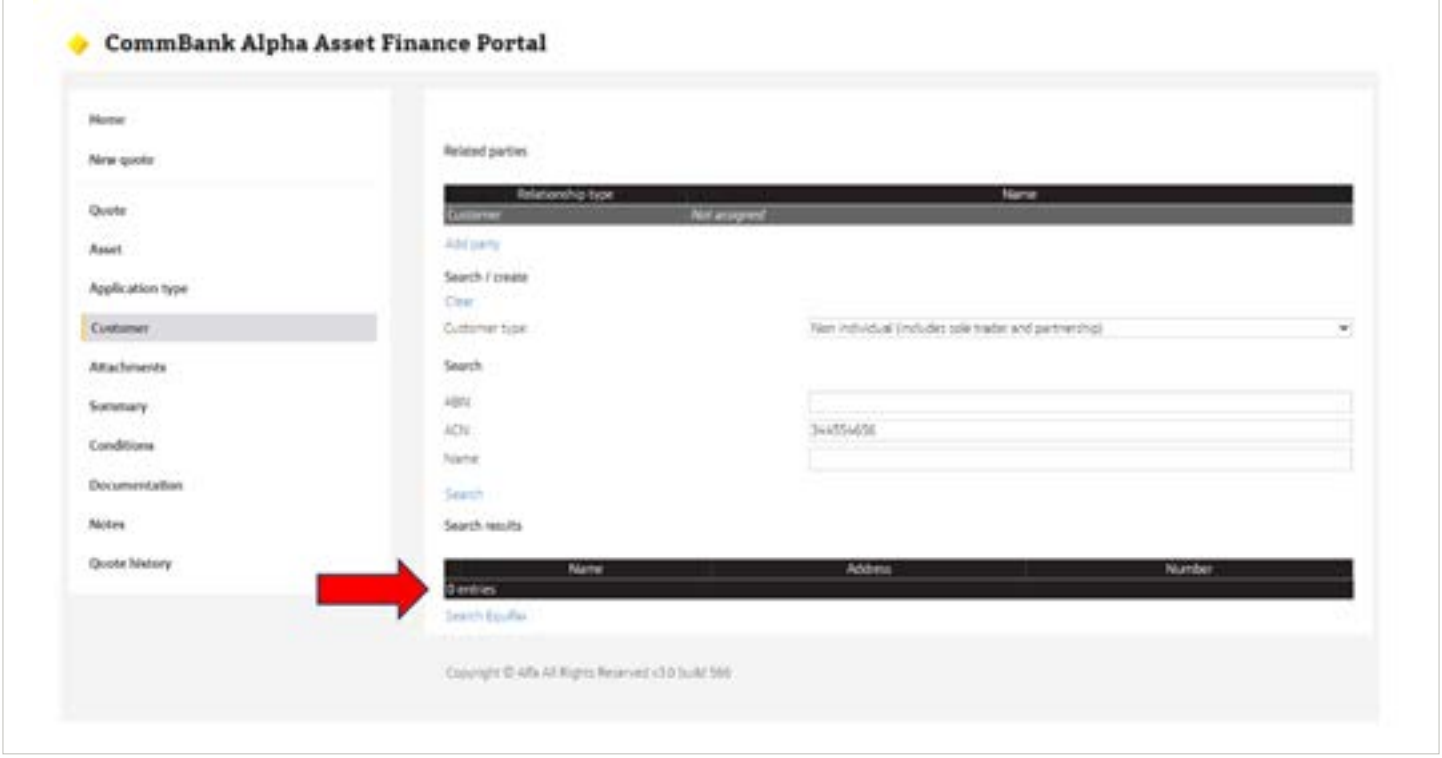
To create **‘Non individual’** parties (includes Sole Trader and Partnerships):

1. Enter relevant search data. Click ***Search***

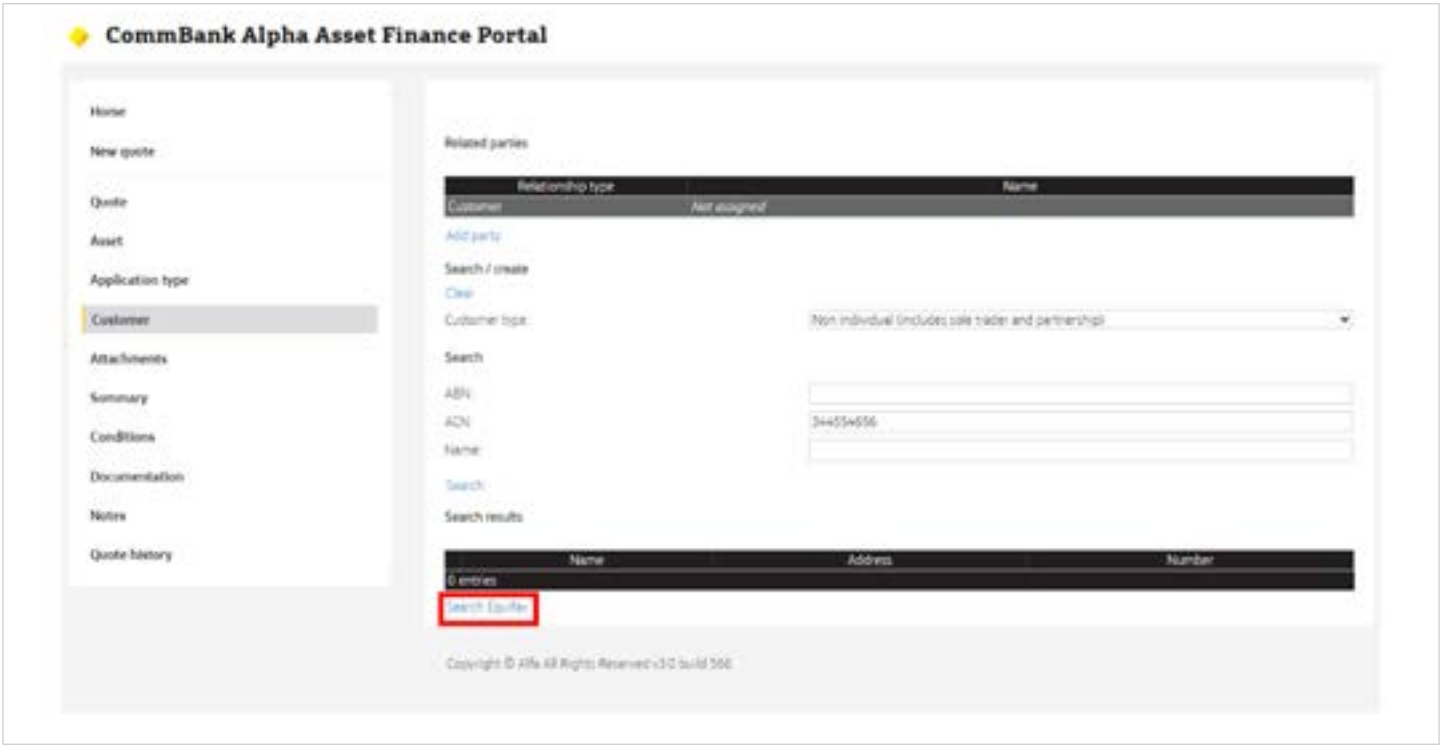
**Tip:** Searching via ACN for a company or ABN for Sole Traders, Trusts, Partnership Name and Business Name will return the most accurate results.




1. Where a matching result is returned under search results, click on the name.

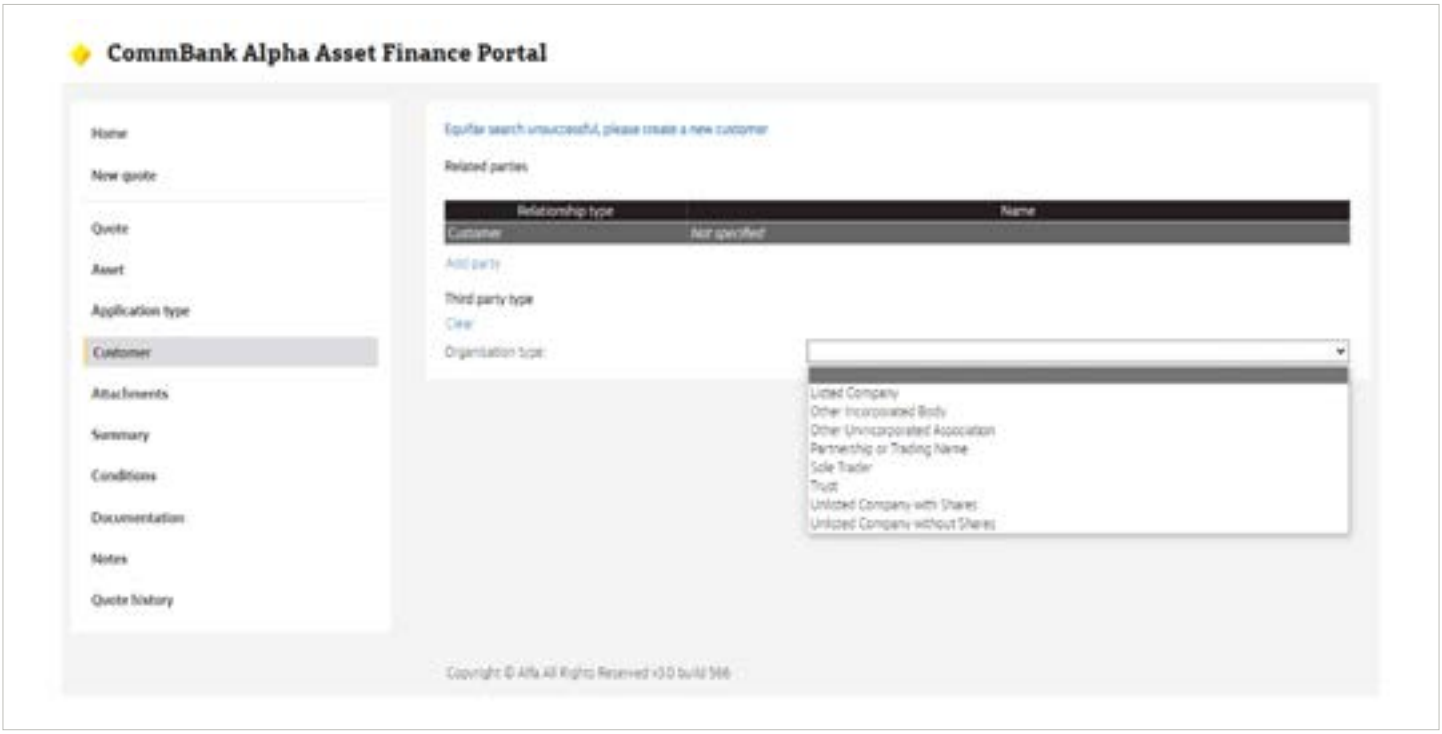


1. Where a result is **not** returned click on the ***Search Equifax*** button. Select the relevant party details from the options available.




**Note:** When clicking the ***Search Equifax*** button, CommBank Alpha™ will search the Australian Securities and Investments Commission (ASIC) Registers and display the relevant results based on the search criteria entered.

1. Select an **Organisation type** from the drop down menu



1. Select Relationship from the next drop down menu – relevant to additional parties being added, not the first party generated.
2. Enter relevant information in Details, Legal Details, Full principle place of business address, Income and expenditure for above, Contact Details and Select mailing address.

ⓘ All fields are crucial as they are required for Anti Money Laundering & Know Your Customer (AML/KYC)
Please ensure you complete Income and Expenditure Details

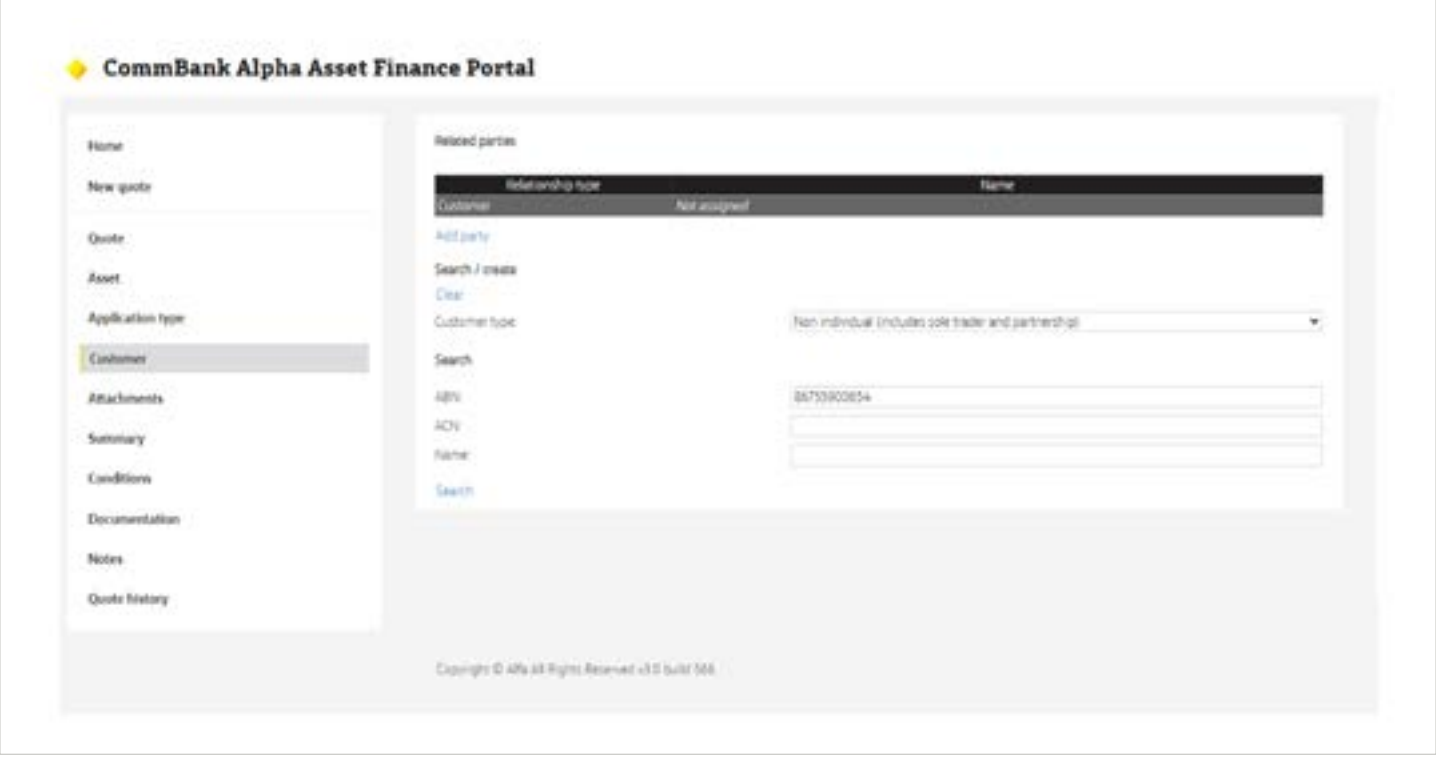
1. Once all fields have been completed, Evaluate the agreement and then click Save.
2. Your non-individual party will now be noted in the related parties table at the top of the screen.

ⓘ Please note that certain non-individual entities will require the setup of multiple parties in CommBank Alpha™ to ensure the loan structure is reflected correctly. Refer to the below:

To set up a partnership structure:

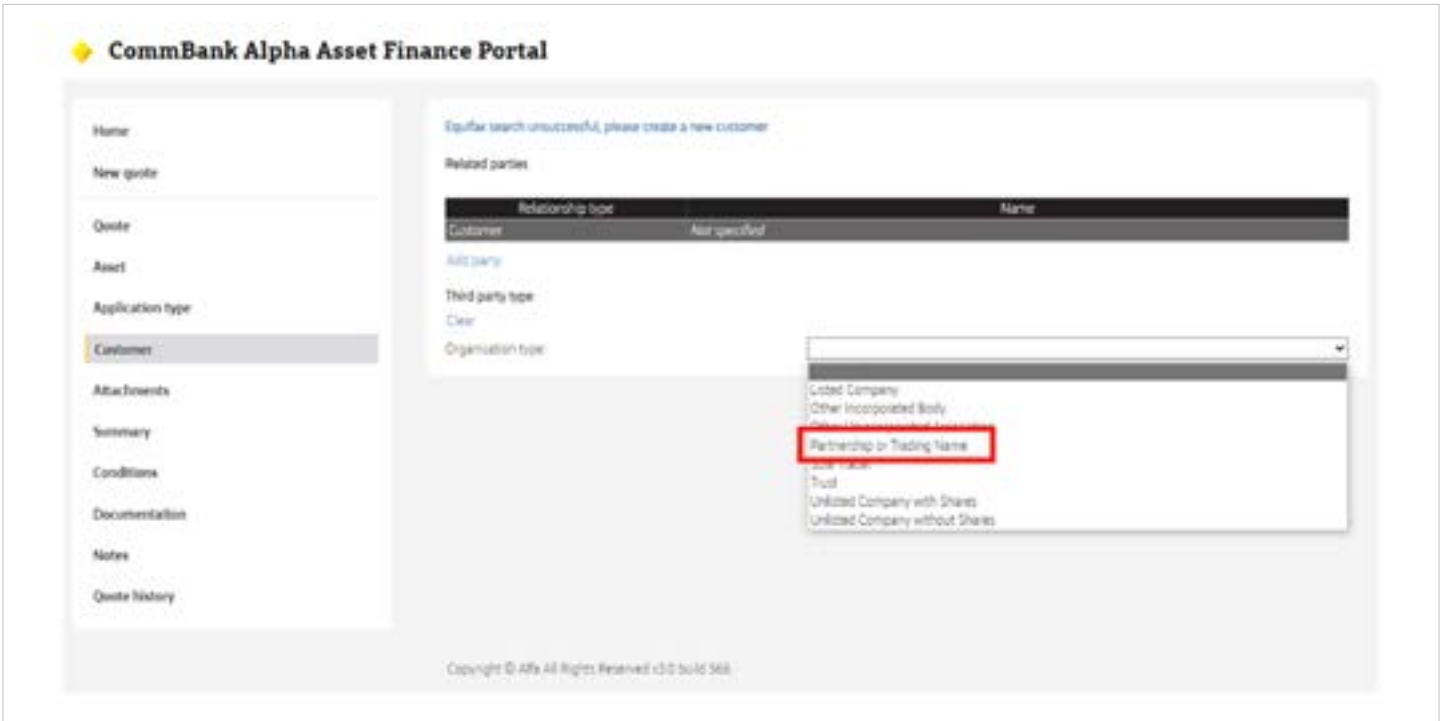
1. Select NON Individual Customer type

   Search via ABN

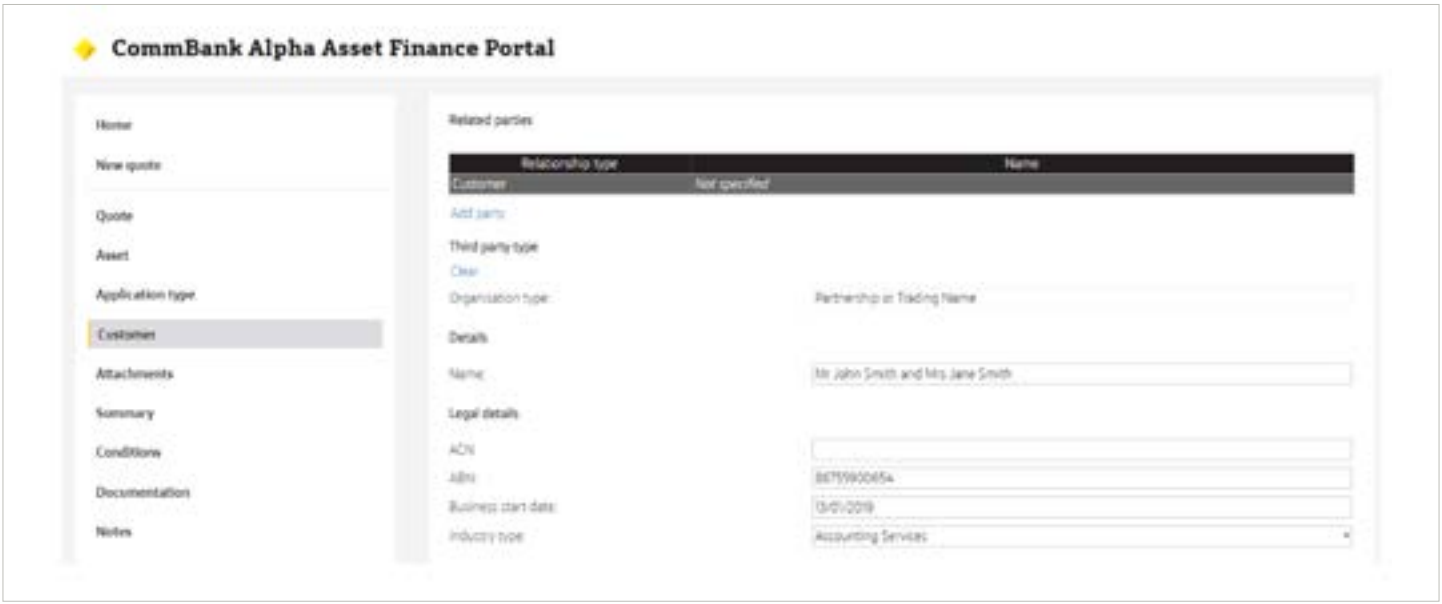



**Note:** For formal partnerships with an ABN, CommBank Alpha™ will search the Australian Securities and Investments Commission (ASIC) Registers and display the relevant results based on the search criteria entered.

1. Where there is a list of results returned, proceed to step 3 or if no results are available, proceed to step 4.
2. Select the relevant party details from the options available.
3. Select ***Partnership or Trading Name*** option from Organisation type drop down menu.

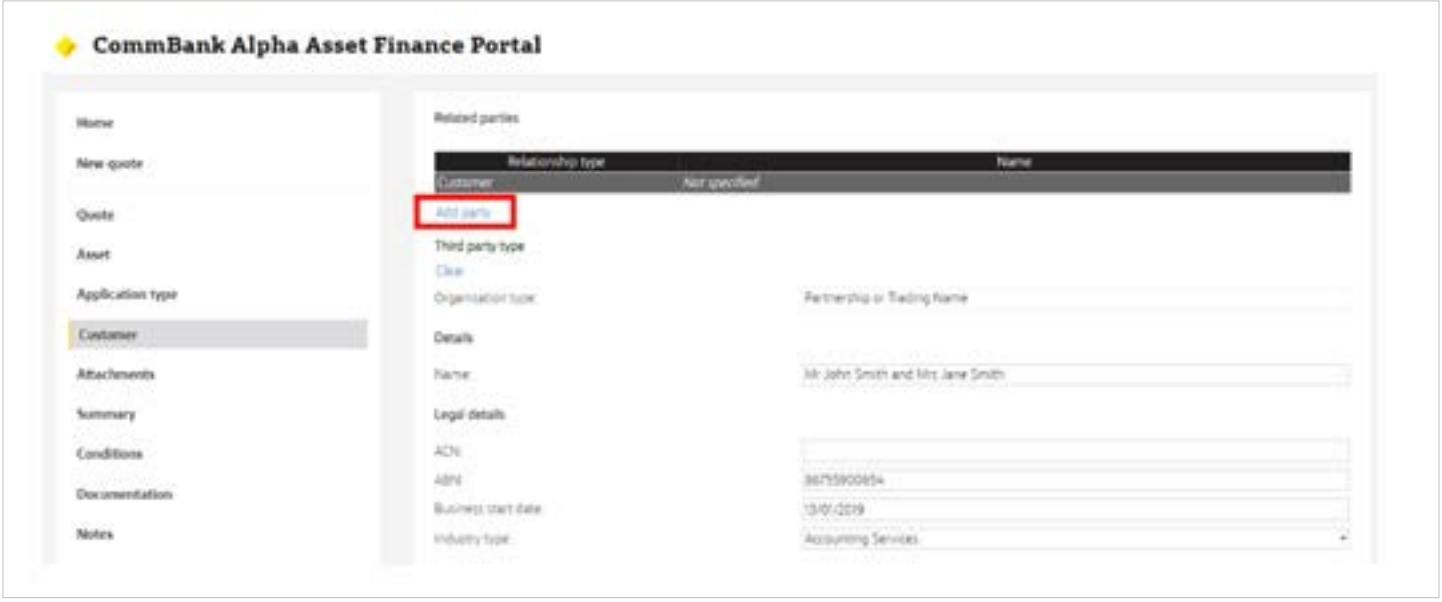



1. Complete all of the mandatory fields for the Partnership details.




**NOTE: Where partnership income is being used for servicing purposes the living expenses of any individuals in the partnership must be included.**

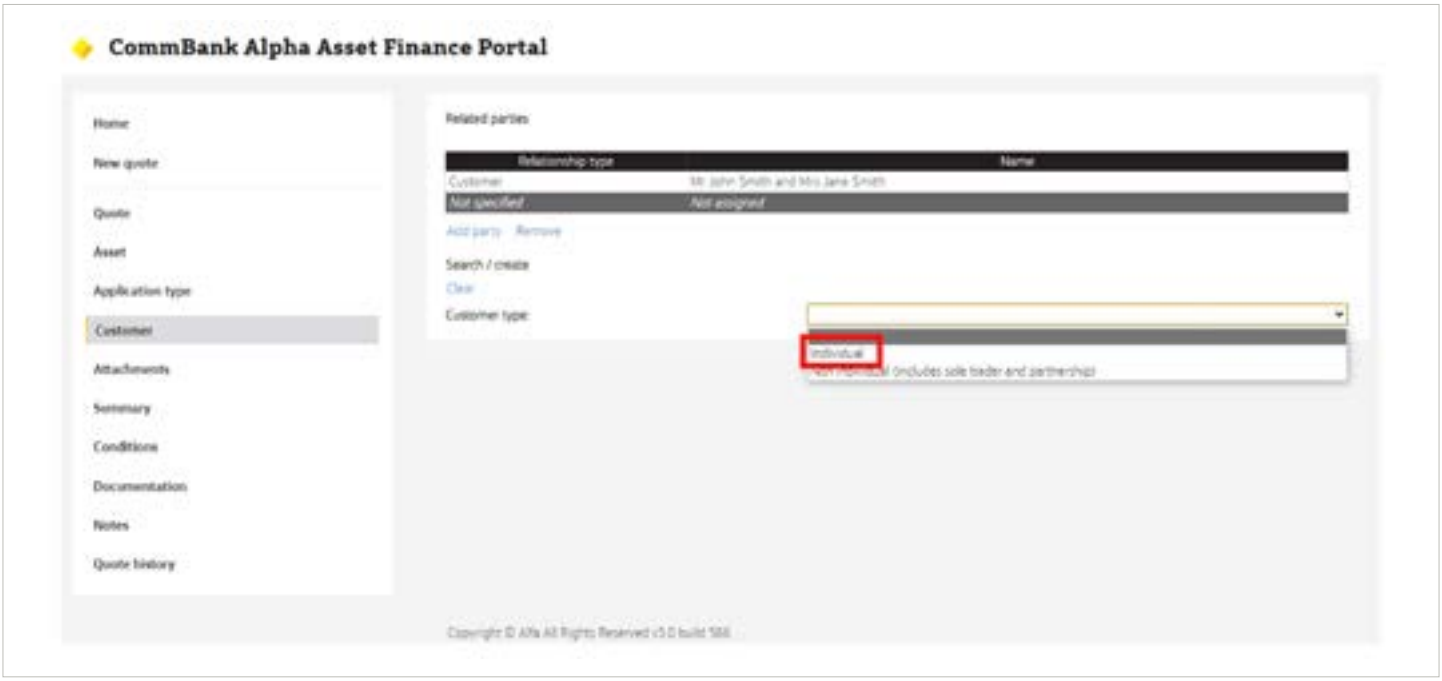
1. Click the ***Add Party*** button to add 'individual' and/or 'non individual' partners.
   (Refer to previous steps on how to create individual/non-individual parties).

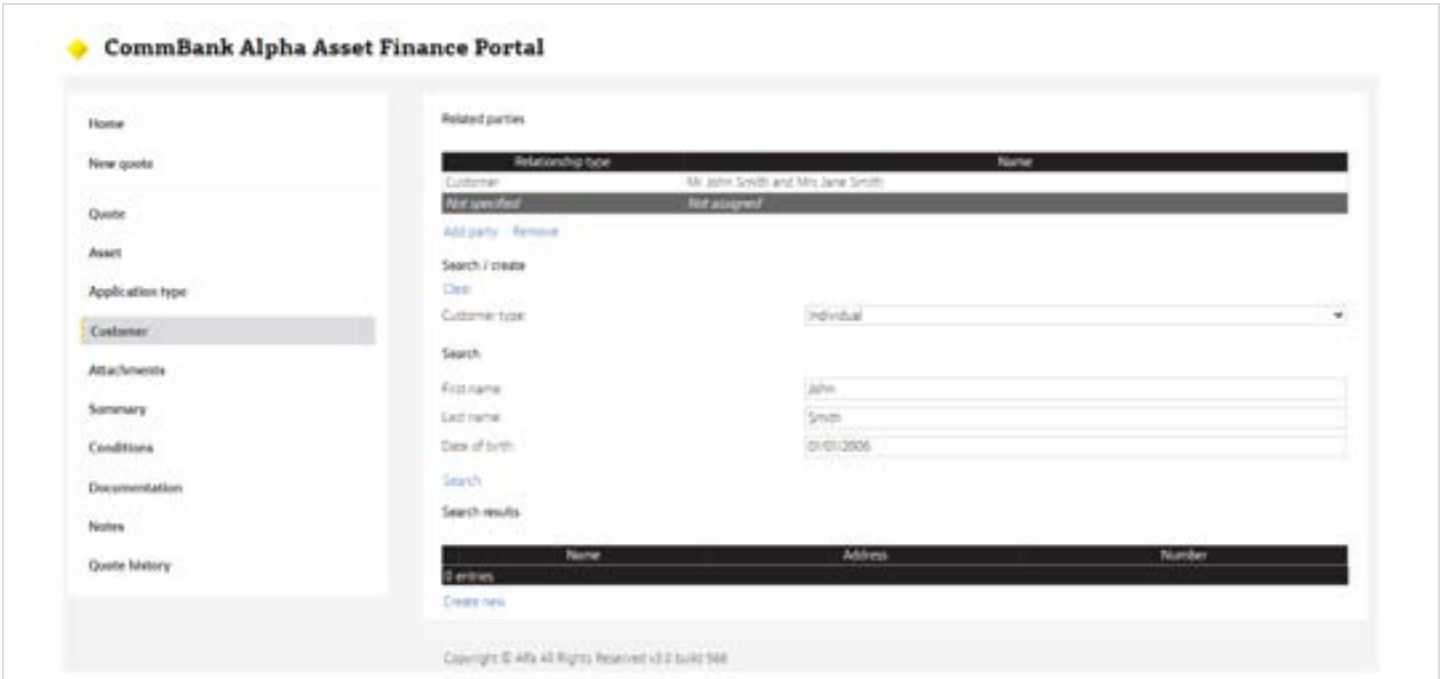


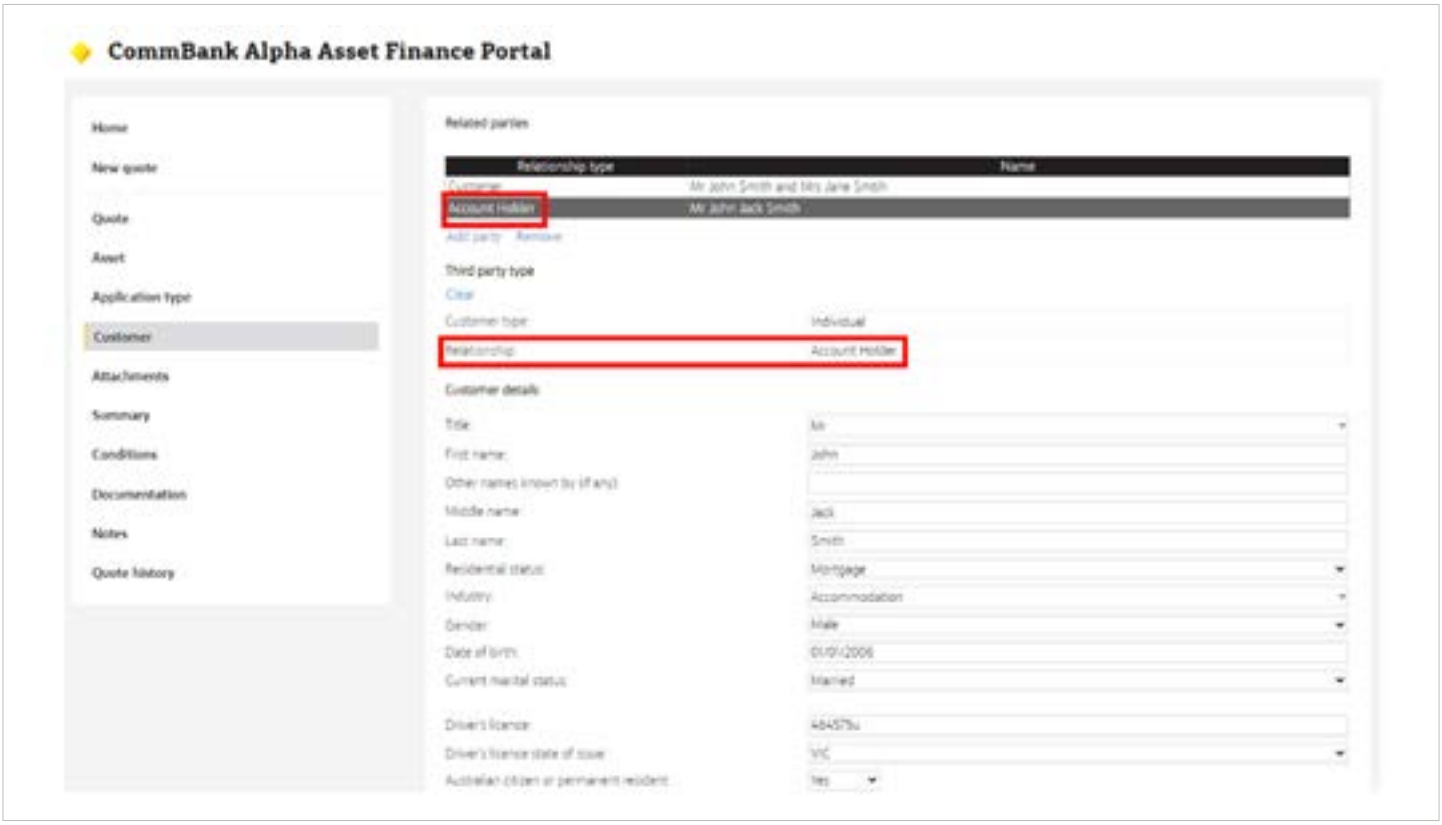

Ensure that each account holder is added in required order, refer table in section 5 on page 16.

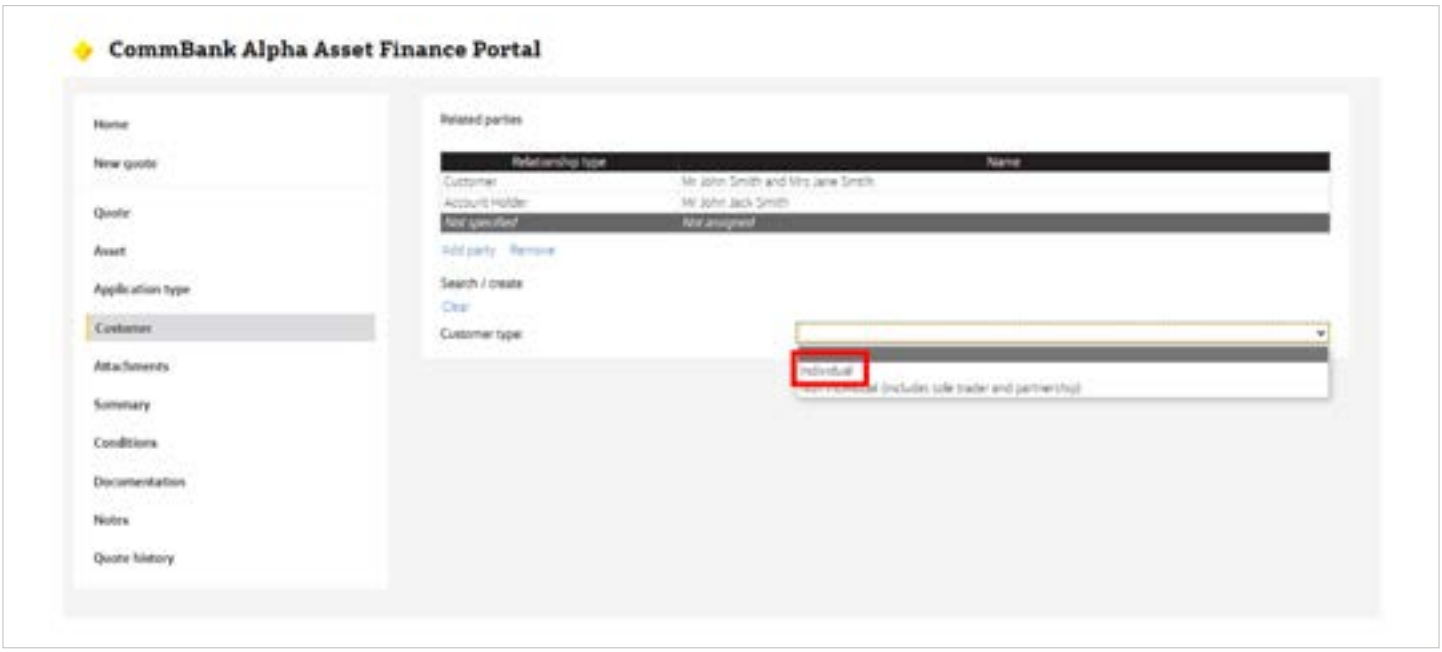
For example:

**Mr John Smith and Mrs Jane Smith** (Partnership Name)
Three separate customers are to be set up in CommBank Alpha™ as follows:
**Mr John Smith and Mrs Jane Smith** are to be set up as customer type Non-Individual PARTNERSHIP OR TRADING NAME
Then add account holder
**Mr John Smith** is to be set up as customer type INDIVIDUAL.


CommBank Alpha Asset Finance Portal
Home
New quote
Quote
Asset
Application type
Customer
Attachments
Summary
Conditions
Documentation
Notes
Quote history
Related parties
Relationship type
Name
Customer
Mr John Smith and Mrs Jane Smith
Not specified
Not assigned
Add party
Remove
Search / create
Clear
Customer type
Individual
Non-individual (includes sole trader and partnership)

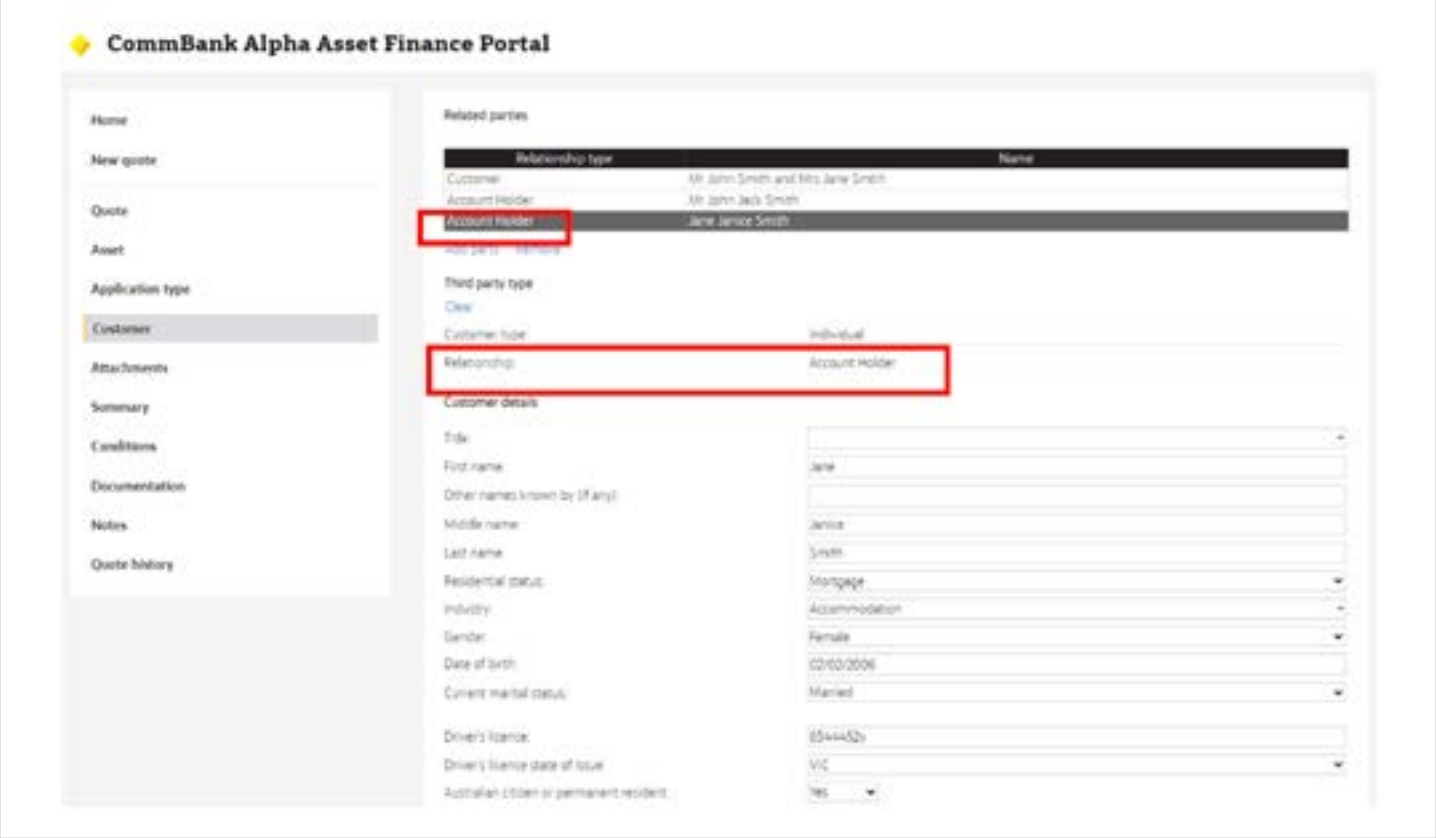

CommBank Alpha Asset Finance Portal
Home
New quote
Quote
Asset
Application type
Customer
Attachments
Summary
Conditions
Documentation
Notes
Quote history
Related parties
Relationship type
Name
Customer
Mr John Smith and Mrs Jane Smith
Not specified
Not assigned
Add party
Remove
Search / create
Clear
Customer type
Individual
Search
First name
John
Last name
Smith
Date of birth
01/01/2000
Search
Search results
Name
Address
Number
0 entries
Create new




Then add account holder

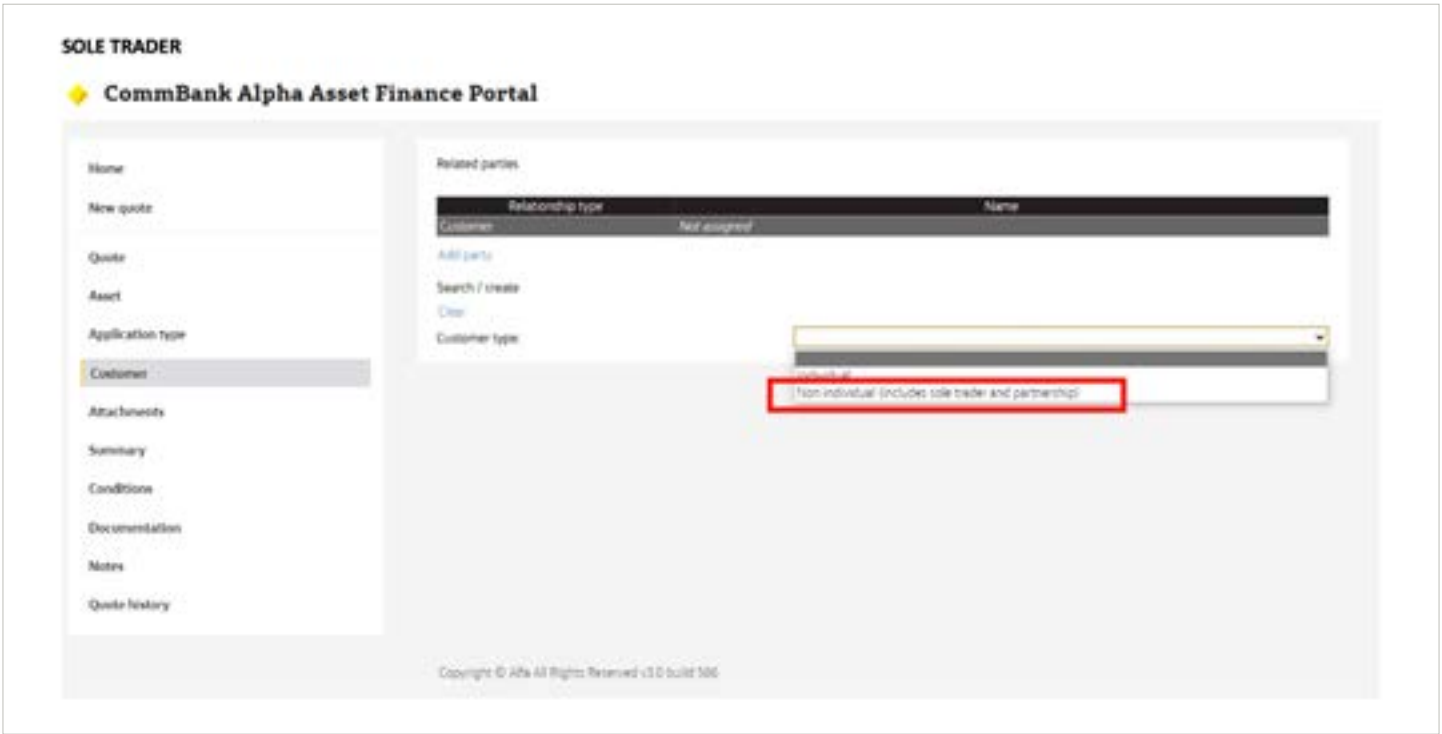
**Mrs Jane Smith** is to be set up as customer type INDIVIDUAL



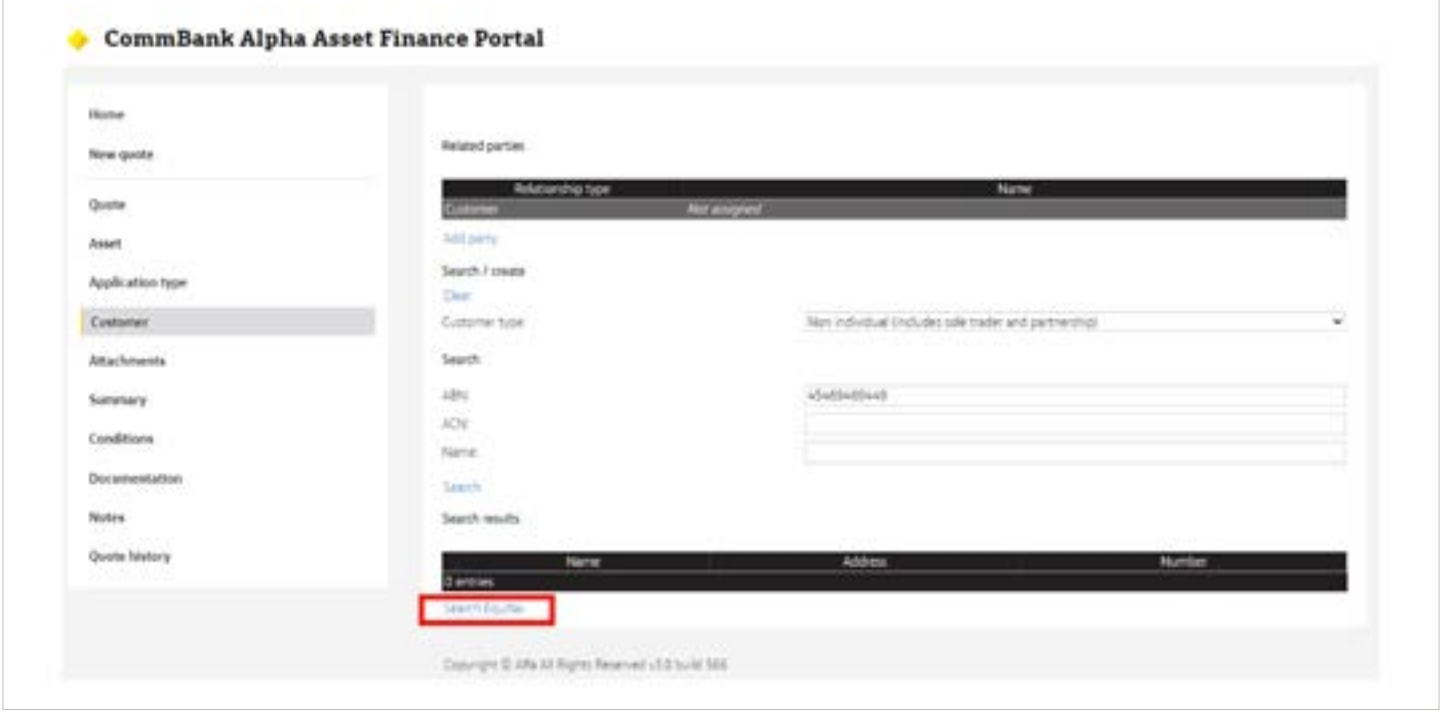

To set up a sole trader structure:

> For the purpose of CommBank Alpha™, all sole trader individuals who generate business income will need to be established as trading in their own individual name by using the non-individual customer type.

1. **Select Customer Type “Non Individual from drop down box**

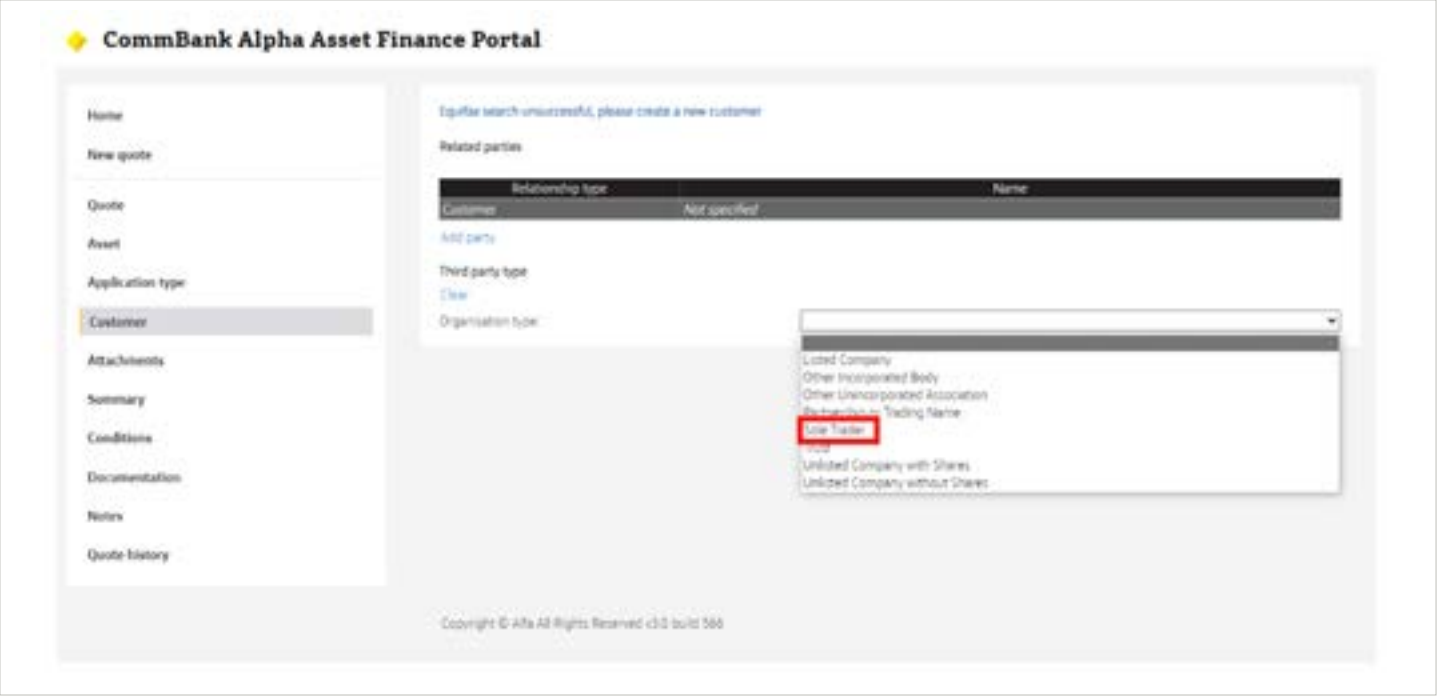



**Note: For best results, search a sole trader via the ABN**. CommBank Alpha™ will search the Australian Securities and Investments Commission (ASIC) Registers and display the relevant results based on the search criteria entered.



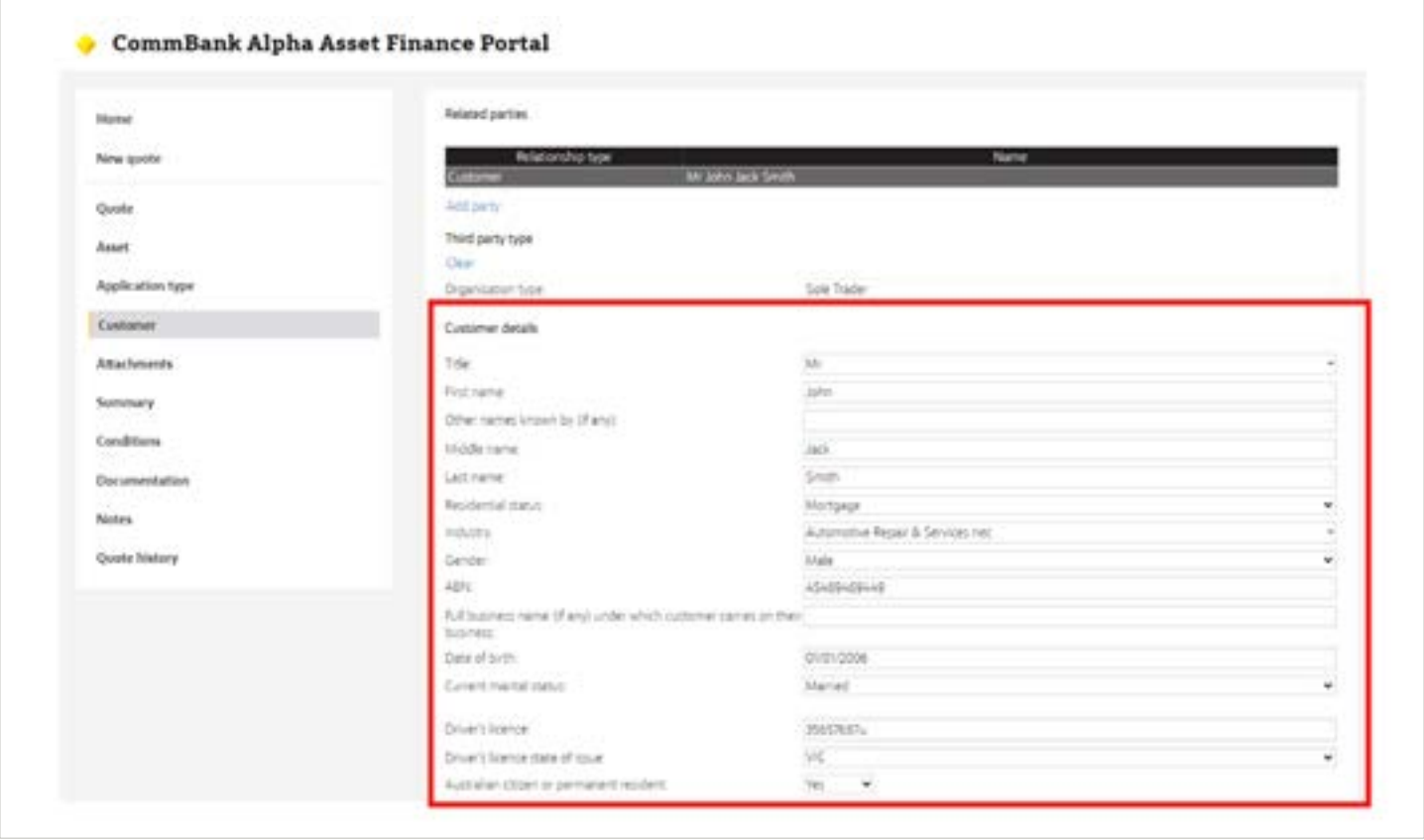

1. Where there is a list of results returned, proceed to step 3 or if no results are available proceed to step 4.
2. Select the relevant party details from the options available
3. Where no results are available, click on Search Equifax. Where no match is returned, proceed to Step 5

1. Select ***Sole Trader*** option from Organisation type drop down menu.




1. Complete all of the mandatory fields for the Trading Name details.

   (Where there is no registered trading name, enter the full name of the individual as the 'Full Business Name'.



1. Click the ***Add Party*** button to add the individual. (Refer to previous steps on how to create individual party)

   Ensure that each account holder is added in the required order, refer table in section 5 on page 16.

   For example:
   **Mr John Smith Trading As Mr John Smith ABN 123 123 123 124**

   Two separate customers are to be set up in CommBank Alpha™ as follows:

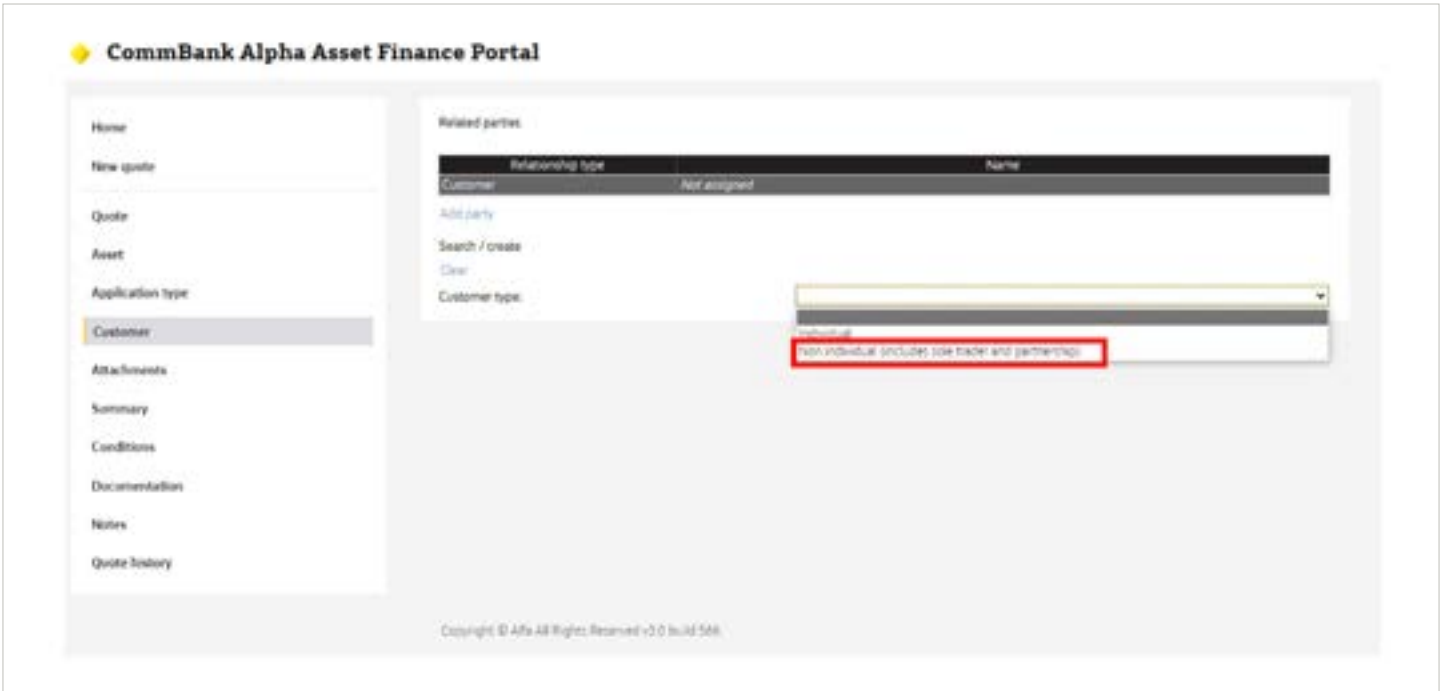
   Mr John Smith is to be set up as customer type Non-Individual SOLE TRADER

   Then add account holder

   **Mr John Smith** is to be set up as customer type INDIVIDUAL.

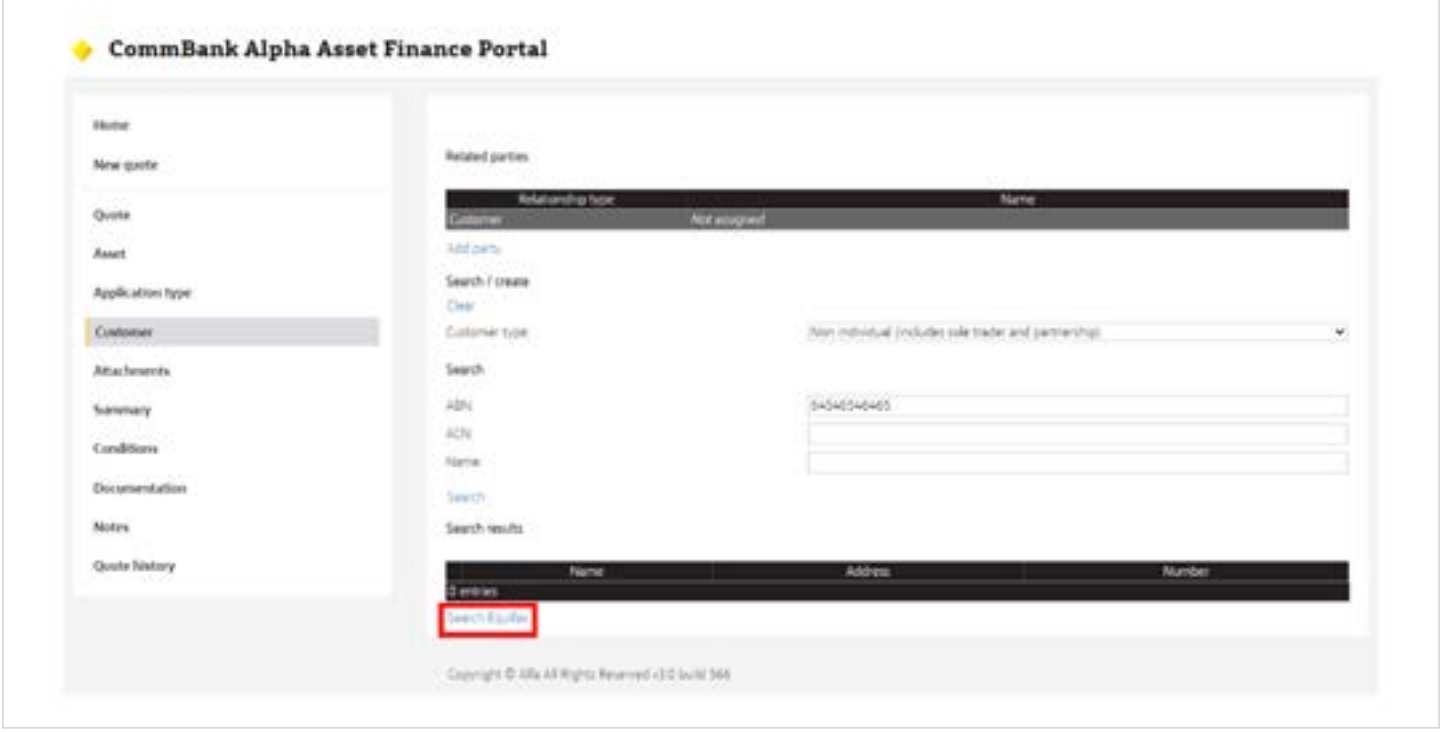
To set up a trust structure:

1. **Select Customer Type “Non Individual from drop down box**

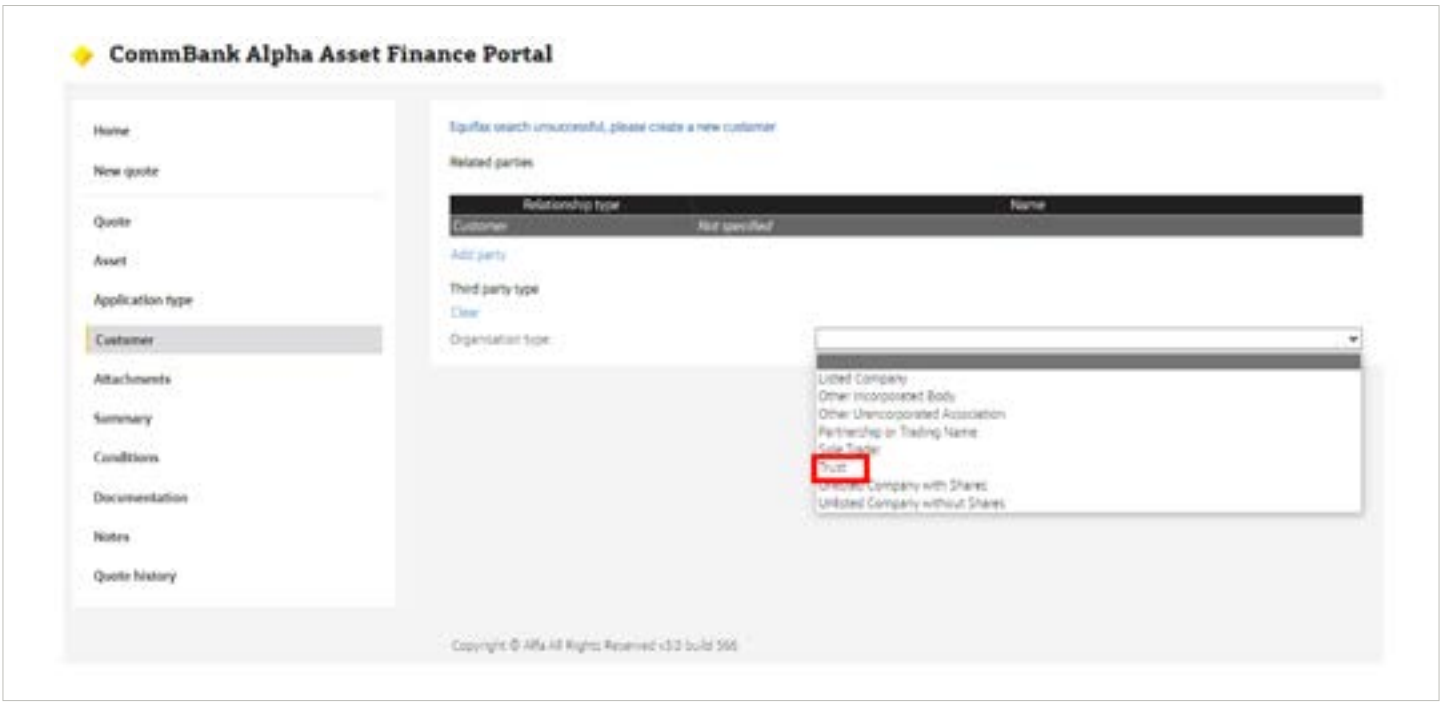



**Note:** For best results, search the Trust via **ABN**. CommBank Alpha™ will search the Australian Securities and Investments Commission (ASIC) Registers and display the relevant results based on the search criteria entered.

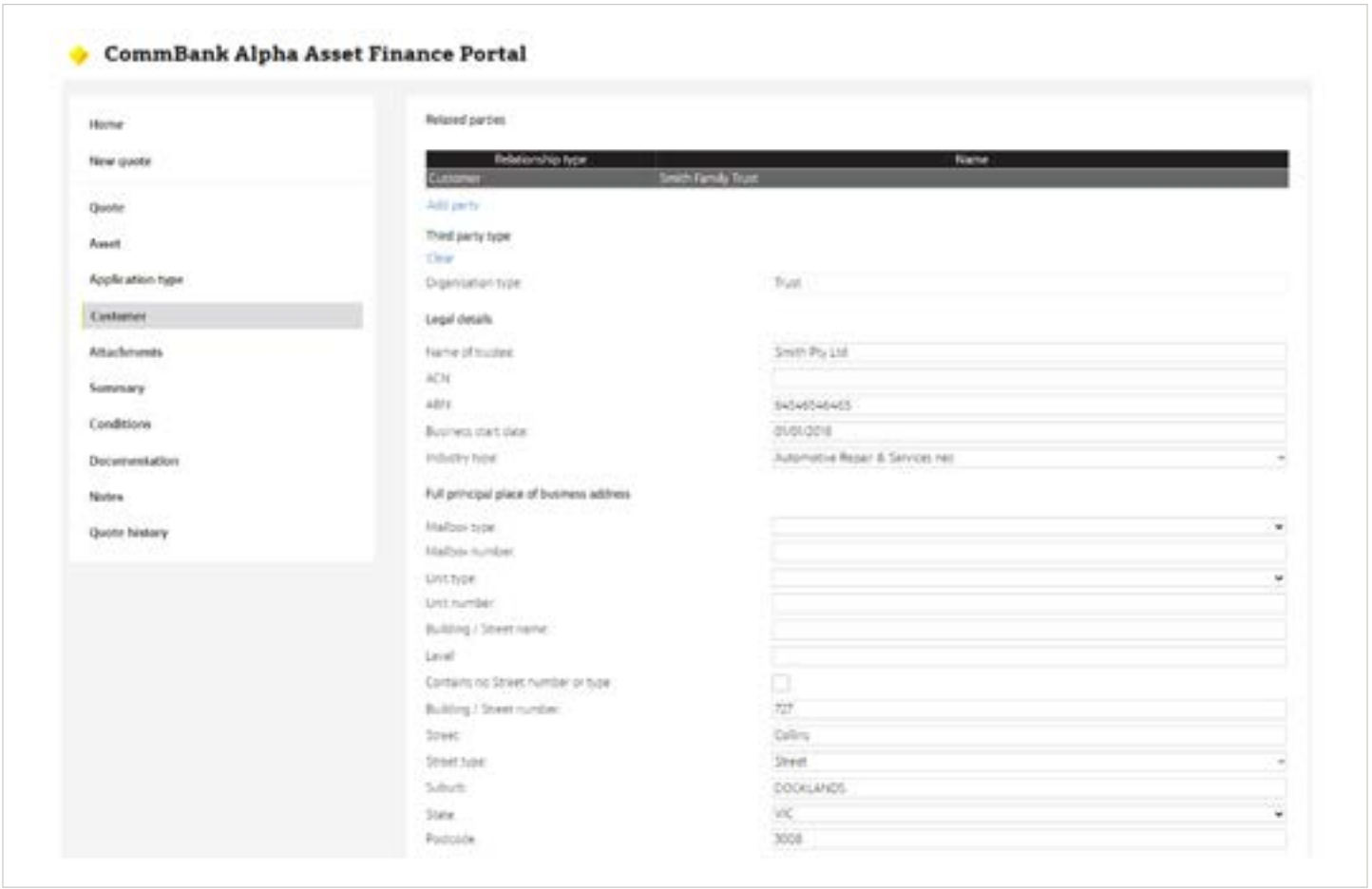
1. Where there is a list of results returned, proceed to step 3 or if no results are available proceed to step 4
2. Select the relevant party details from the options available
3. Where no results are available, click on Search Equifax. Where no match is returned, proceed to Step 5

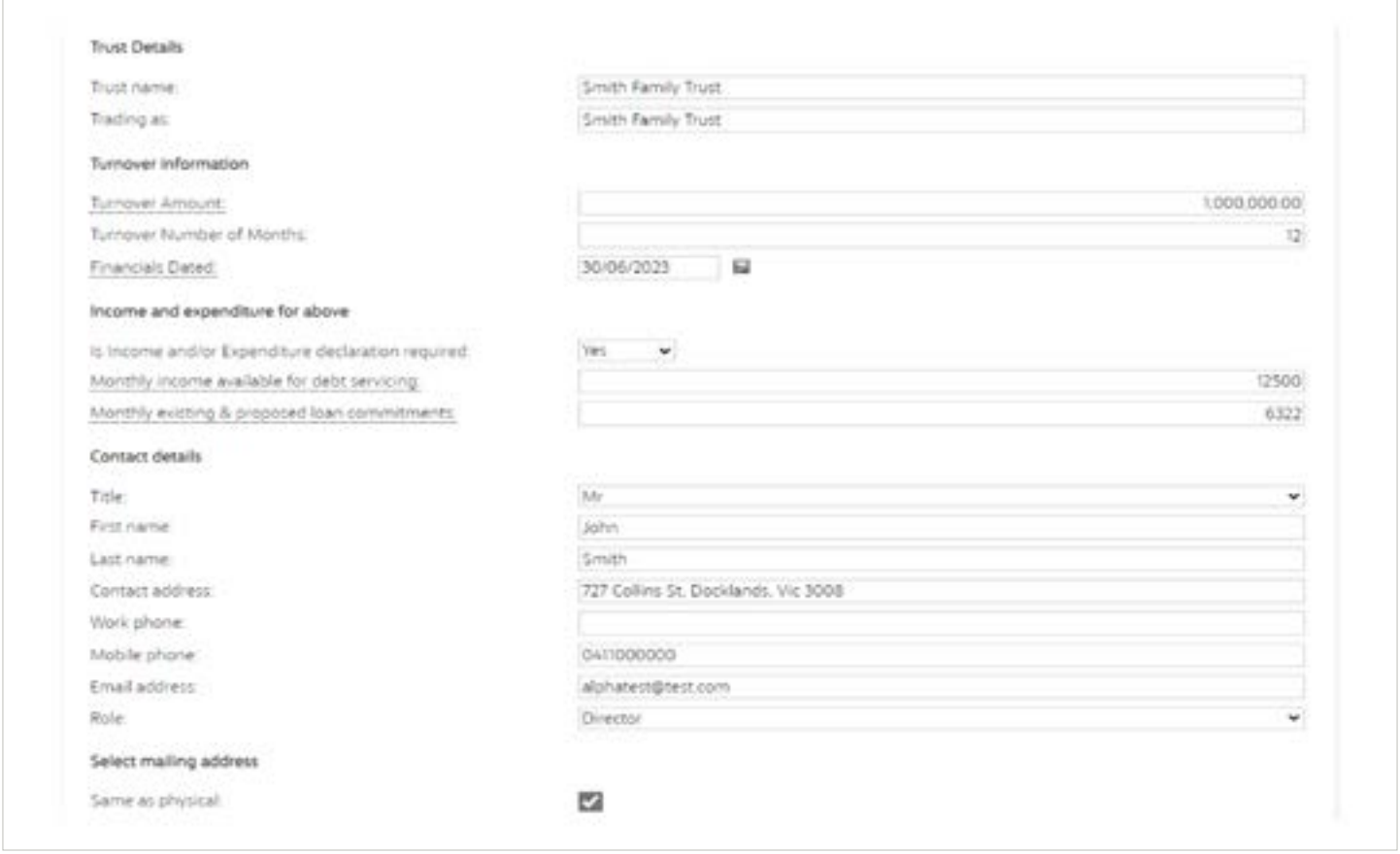


1. Select ***Trust*** option from Organisation type drop down menu.




1. Complete all of the mandatory fields for the Trust details.






**Note:** Ensure you complete the income and expenditure tab for the applicable application types

1. Click the ***Add Party*** button to add the trustee(s). (Refer to previous steps on how to create individual/non-individual parties)

   Ensure that each account holder is added in required order, **refer table in section 5 on page 16.**

   For example:

   **Smith Pty Ltd as trustee for the Smith Family Trust**

   Two separate customers are to be set up in CommBank Alpha™ as follows:

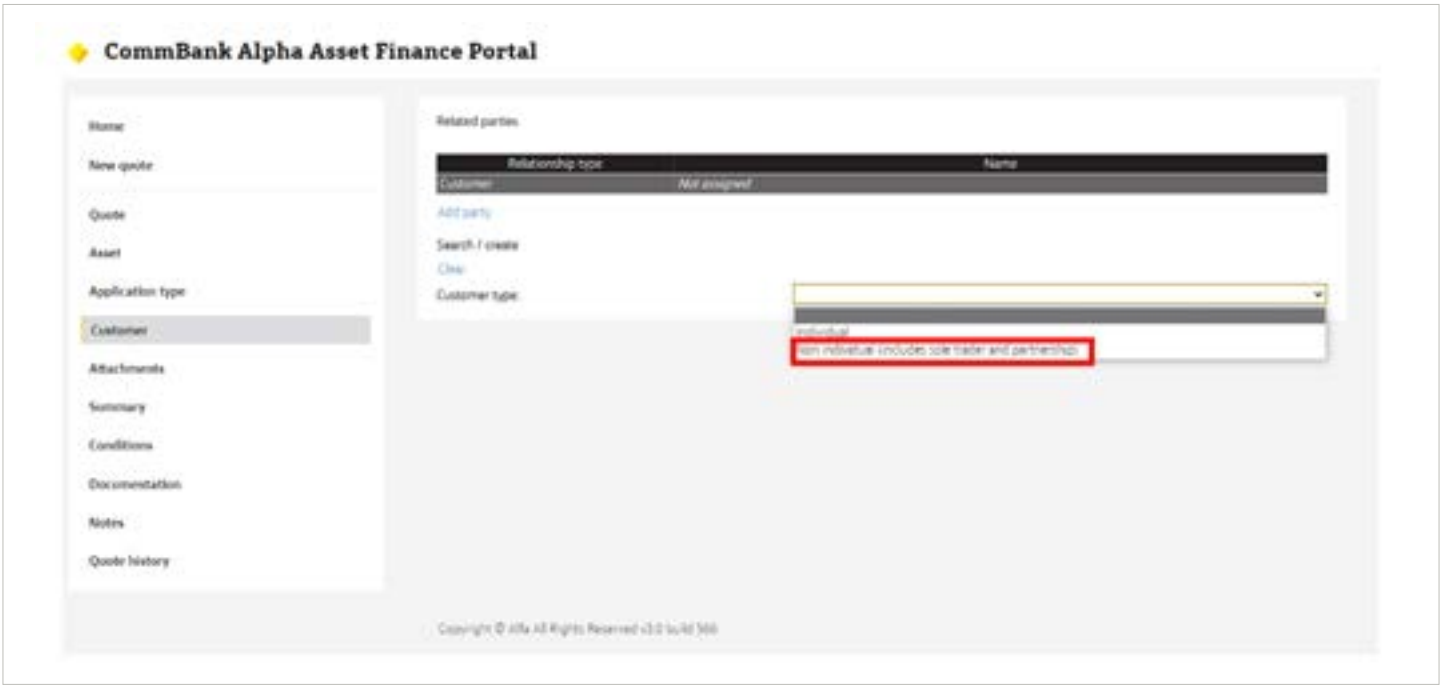
   The **Smith Family Trust** is to be set up as customer type Non-Individual TRUST.

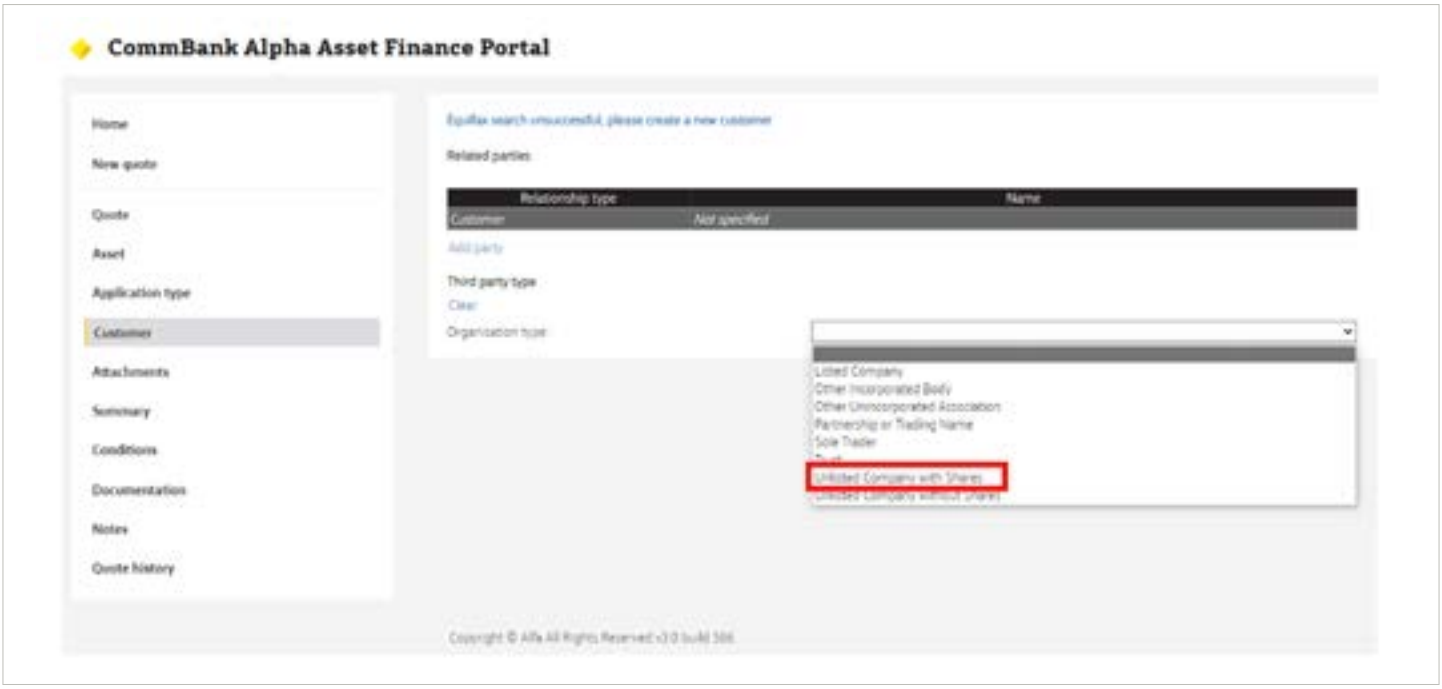
   Then add select “add party”

   Select Customer Type: Non Individual

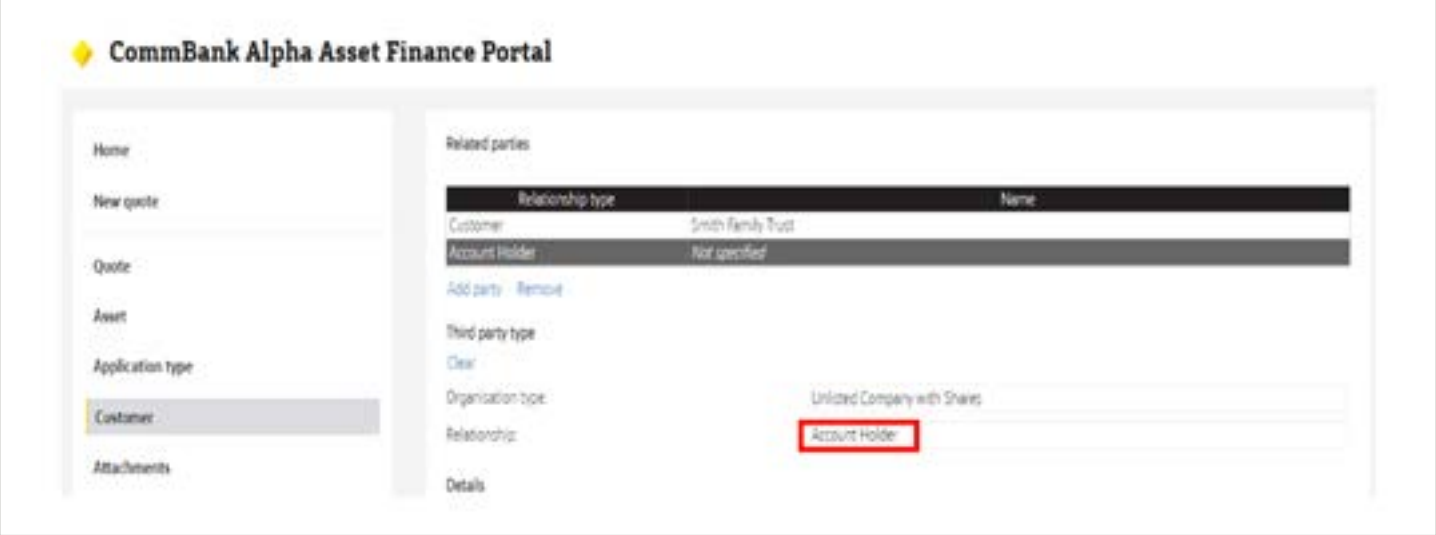
   **NOTE:** when adding the trustee, for best results, be sure to search via **A.C.N. If there are no results, follow steps 2-4 as outlined above.**

   **Smith Pty Limited** is to be set up as customer type Non-Individual UNLISTED COMPANY WITH SHARES.

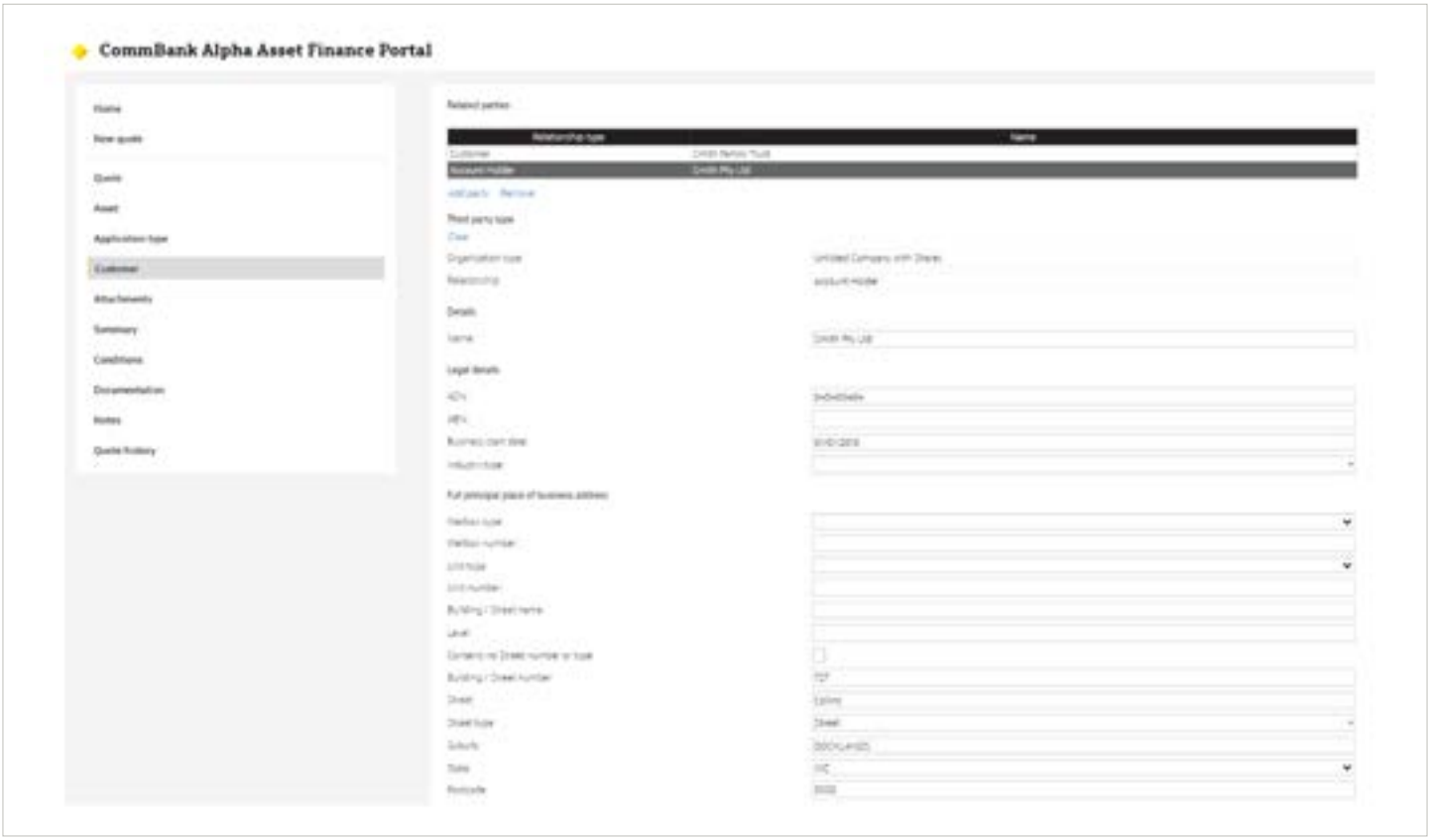

CommBank Alpha Asset Finance Portal
Home
New quote
Quote
Asset
Application type
Customer
Attachments
Summary
Conditions
Documentation
Notes
Quote history
Related parties
Relationship type
Name
Customer
Not assigned
Add party
Search / create
Clear
Customer type
individual
non individual includes sole trader and partnership


CommBank Alpha Asset Finance Portal
Home
New quote
Quote
Asset
Application type
Customer
Attachments
Summary
Conditions
Documentation
Notes
Quote history
Equifax search unsuccessful, please create a new customer
Related parties
Relationship type
Name
Customer
Not specified
Add party
Third party type
Clear
Organisation type
Listed Company
Other Incorporated Body
Other Unincorporated Association
Partnership or Trading Name
Sole Trader
Unlisted Company with Shares

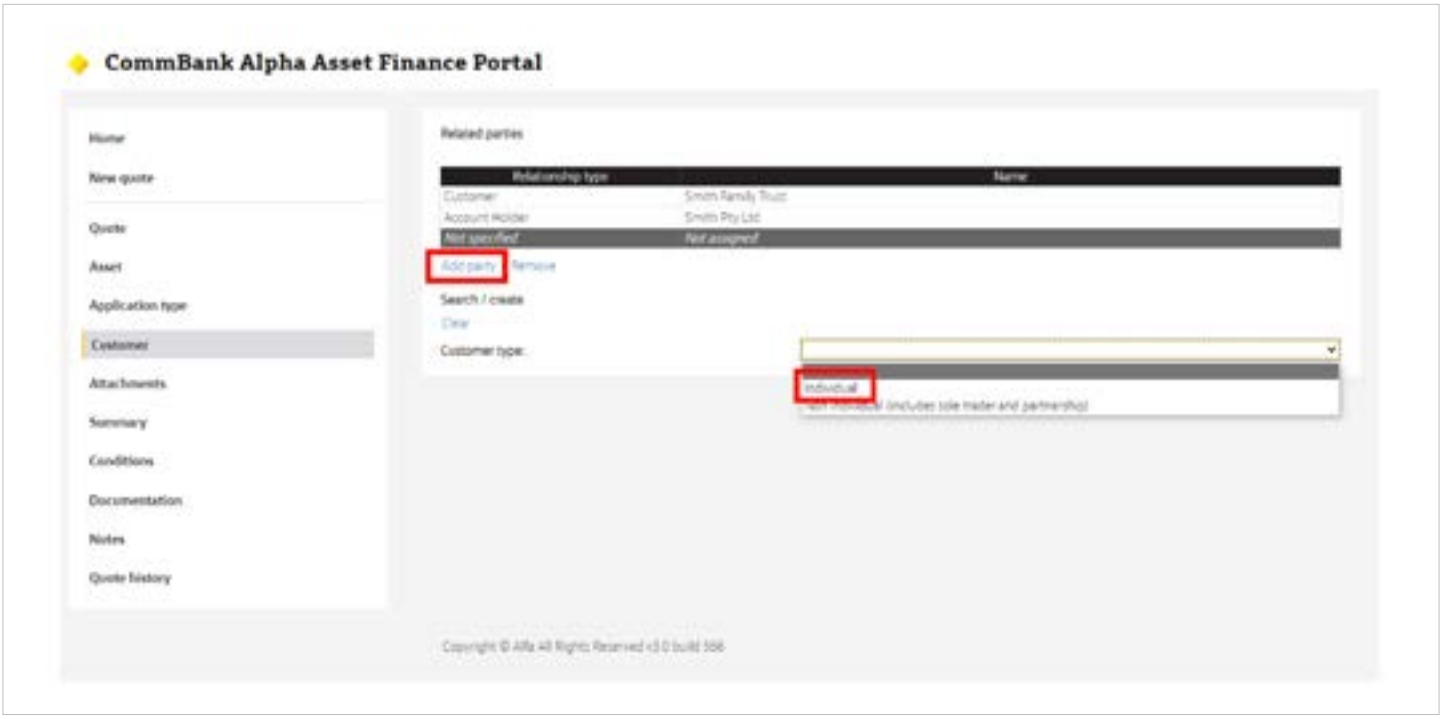
**Relationship:** select Account Holder




1. Complete all fields for the trustee



1. Click the ***Add Party*** button to add the guarantors. (Refer to previous steps on how to create individual parties)



# Uploading attachments

Click on the Attachments tab

This screen will be used to attach all files relevant to the application.

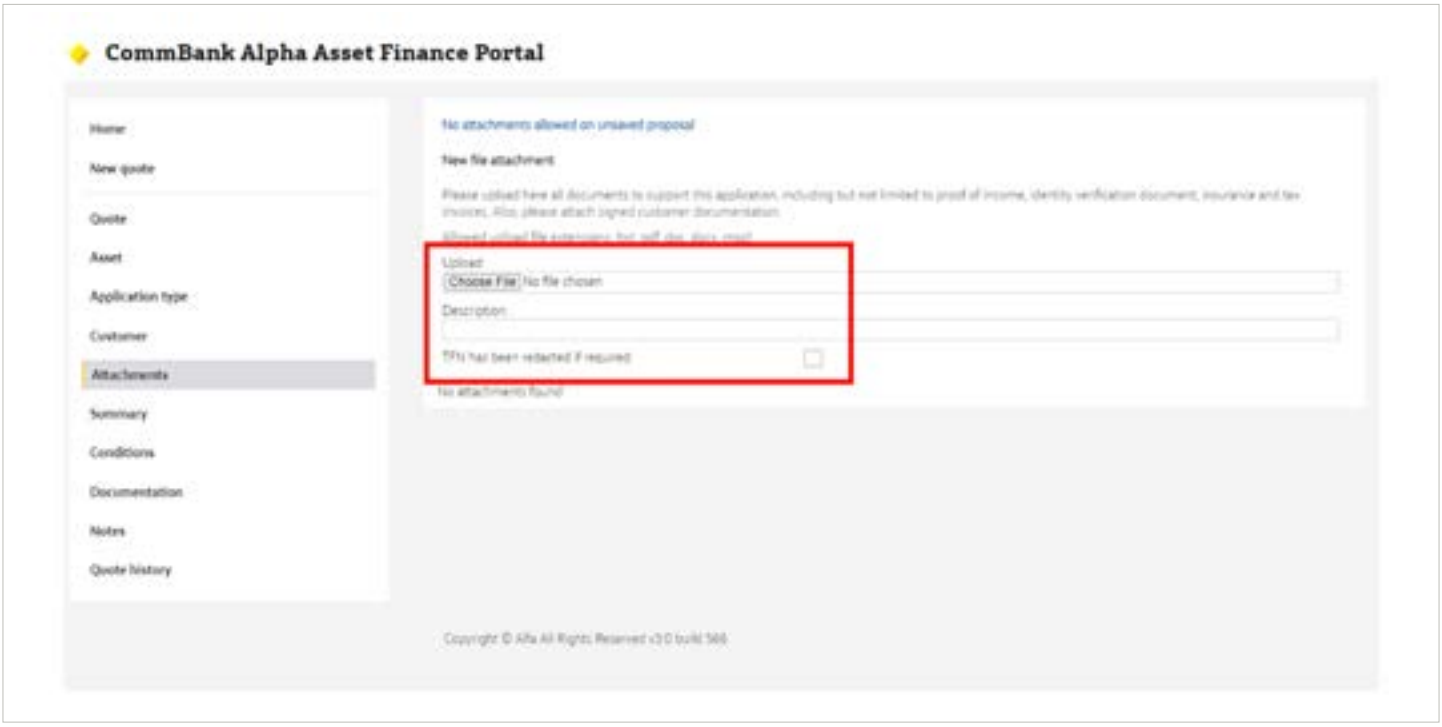
This may include but is not limited to; proof of income, identity verification documents, insurance, tax invoices and signed loan documents etc.

The file type must meet the prescribed file extensions: [txt, pdf, doc, docx] and only one attachment can be added at a time. The maximum file size per attachment is 10MB.

**Note:** As CommBank Alpha™ does not store attachments, once your document has been uploaded, it will only appear in the attachment listing and will not be viewable on CommBank Alpha™ again.

To upload attachments:

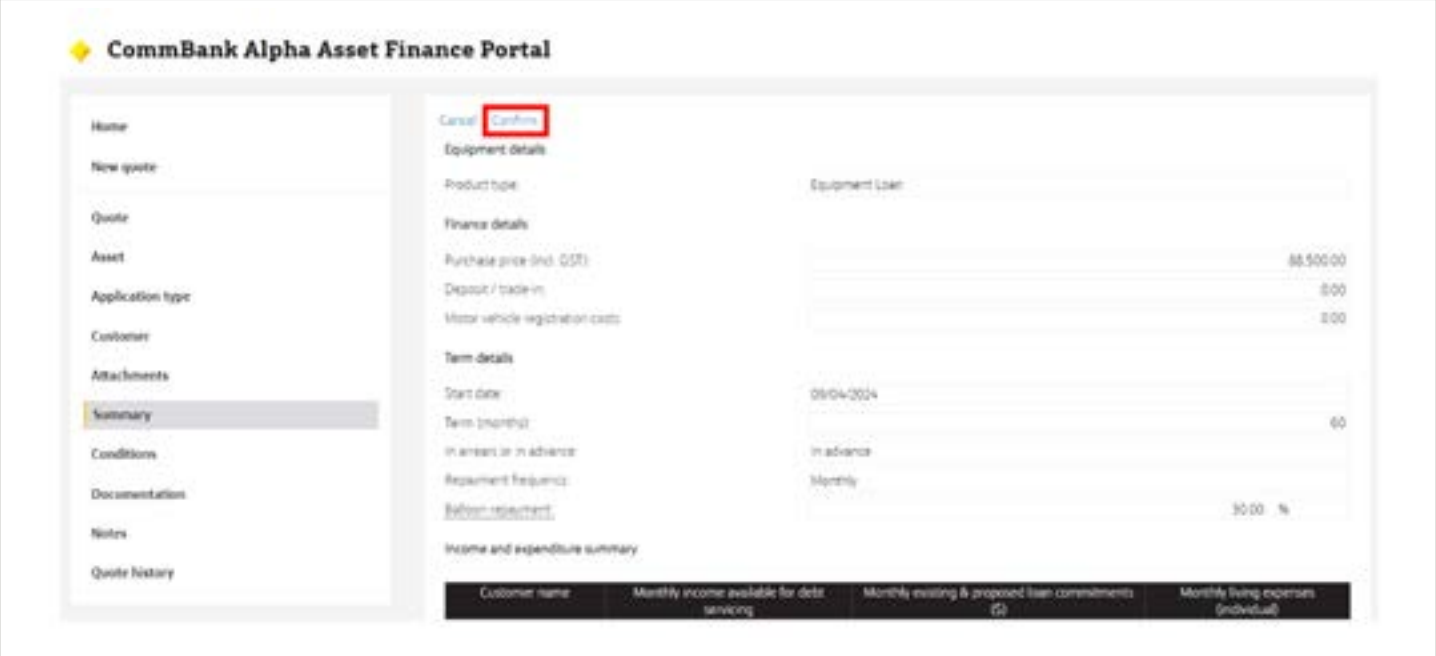
1. Click on **Choose File** button.
2. Locate and select the relevant document in your computer files.
3. Once selected, click ***Open*** button in your file explorer.
4. Document title will now be shown next to the **Browse** button in CommBank Alpha™.
5. Enter a description for the attachment. E.g. 'Payslips – John Smith'.
6. Click ***Upload*** to add this document to the application.



# Submitting an application for conditional approval

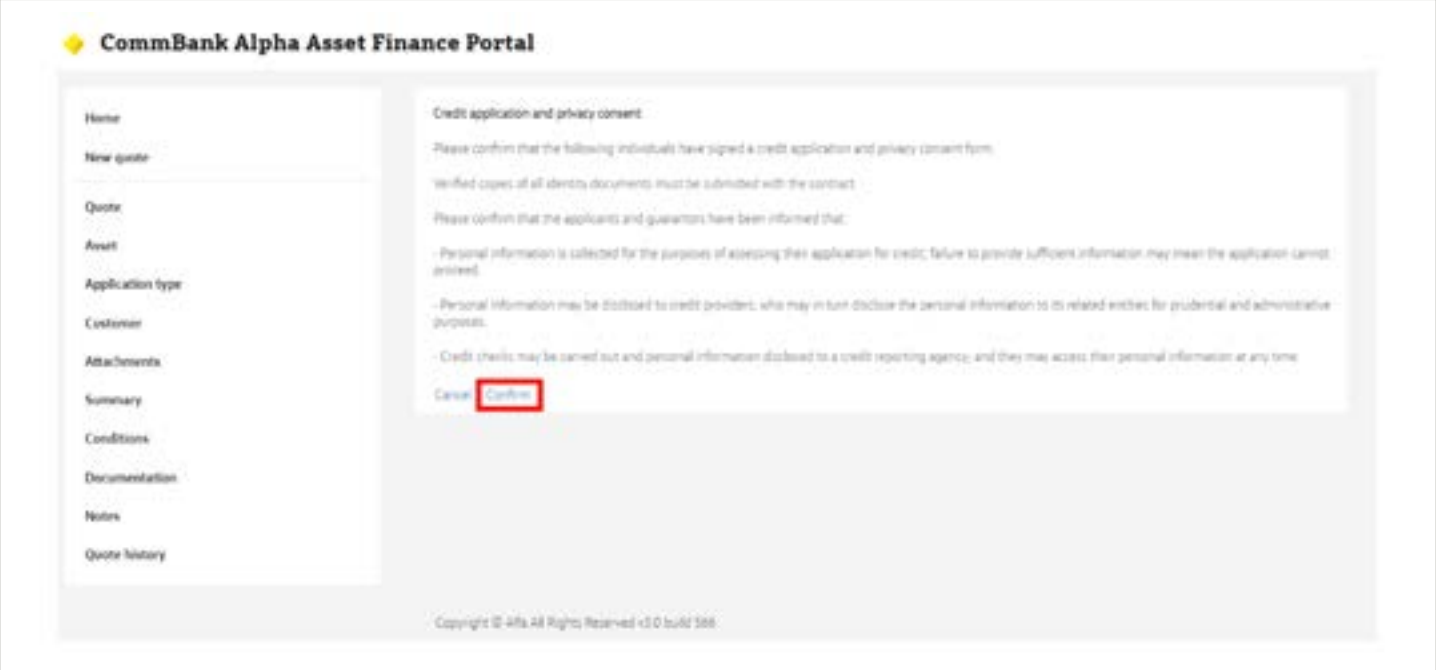
1. Click on Summary tab.
2. Review application information to ensure all details are correct.
3. Click ***Evaluate*** and then click ***Save***.
4. Click ***Submit for approval*** button.
5. Click ***Confirm*** to finalise submission.

1. Review credit application and privacy consent and click Confirm to proceed.



Once confirmed, the Proposal Summary screen will appear as per below with confirmation of the credit decision and next steps.

Should you wish to access this again once changing screens, you can do so by clicking the Credit Decision tab.




**Tip:**

Once the application has been submitted for approval it may take around 1-2 minutes for the result to be returned.

If conditionally approved, you will also receive an automated email advising you of the status of the application as submitted. An internal assessment will be completed prior to a formal approval being issued.

If application is “referred”, the application will progress to the queue. You will not receive an automated email. Should you wish to investigate the reason for the “referred” decision, please contact your Business Development Executive.

If decision is ‘declined’ the application will not progress any further. Please contact your Business Development Executive if you require additional assistance.

# Accessing application documentation

Click on the Documentation tab

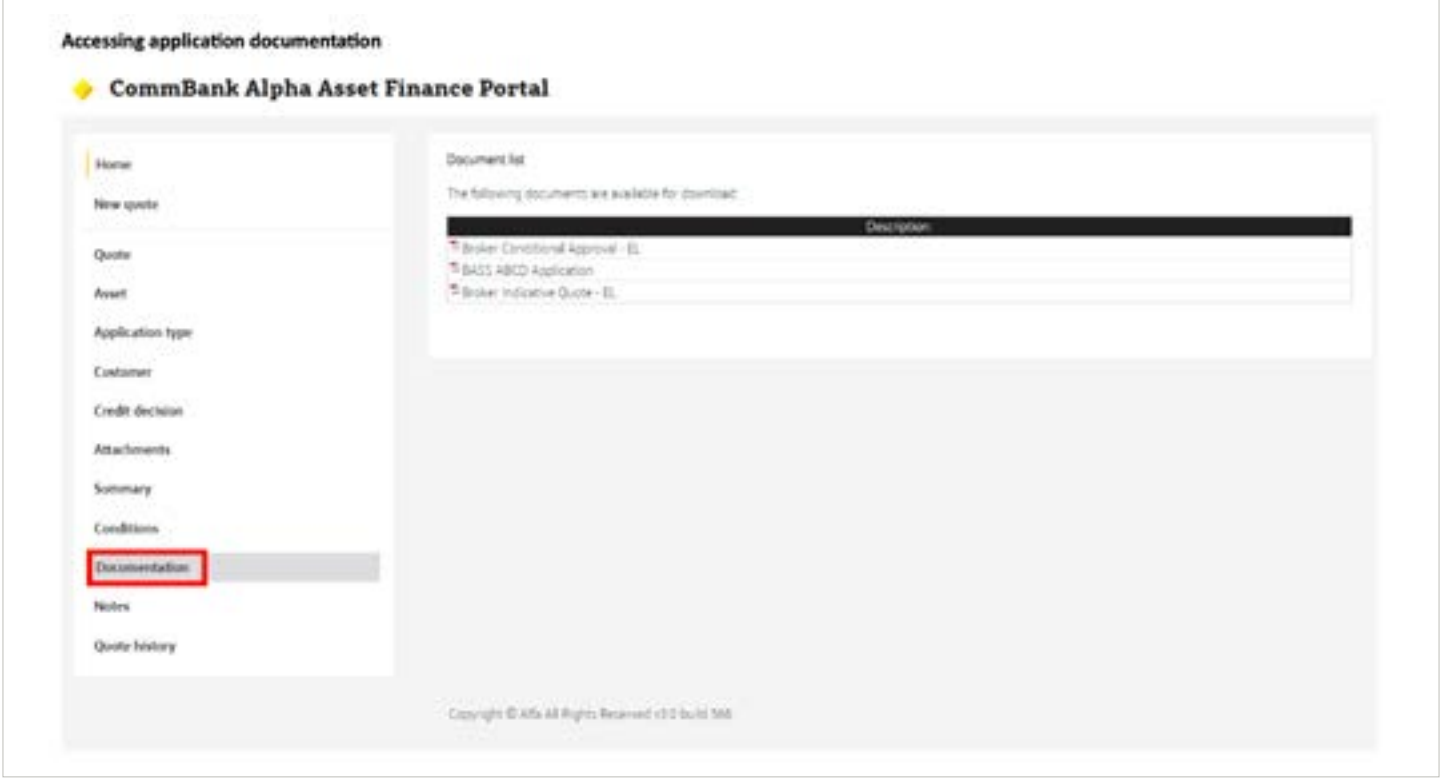
From this page you will be able to download a copy of any documents related to the application.

This includes but is not limited to documents such as:

- Broker Indicative Quotes
- Instant Conditional Approval
- Contract documents

To download any of the documents:

1. Click on the document title to download that document and it will automatically commence.



# Search for existing quotes

Click on the Home tab.

A search can be completed on a single quote or on multiple quotes using the Workflow status option.

To search for a single quote:

1. Enter the quote number (E.g. AAU123XXX) OR customer name in relevant field.
2. Ensure workflow status is set to ‘any except cancelled’ and click search.

To view multiple quotes based on status:

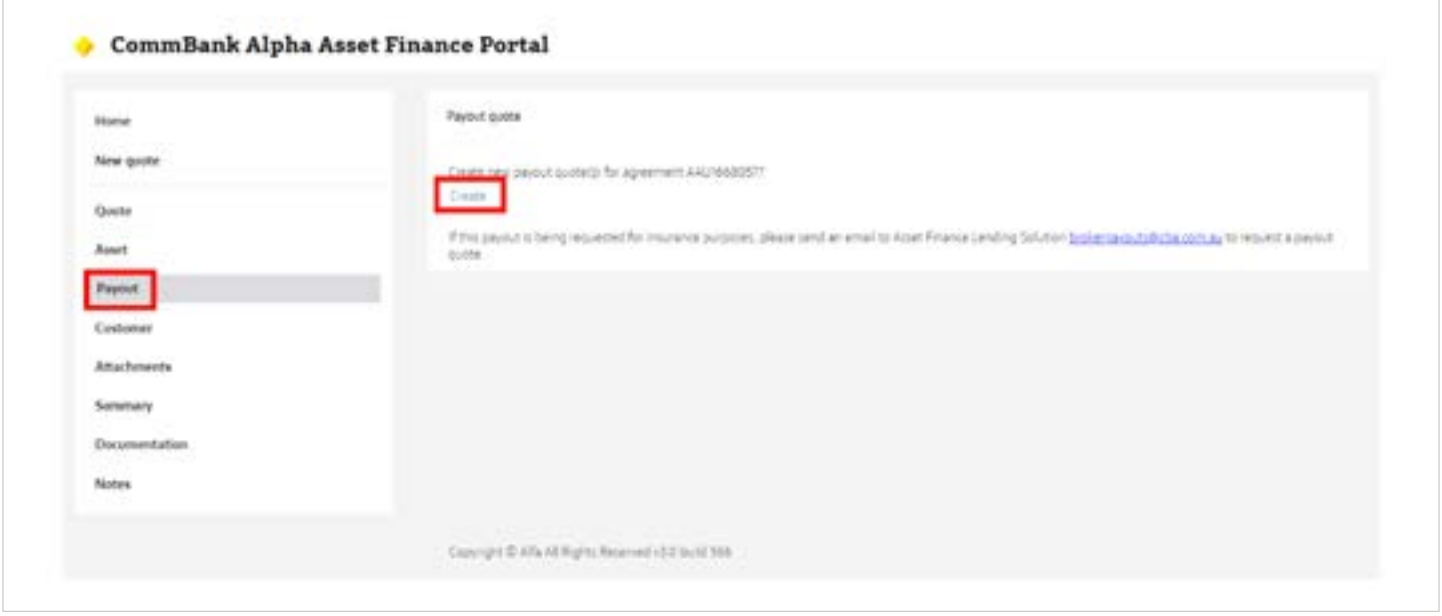
1. Ensure quote number and customer name fields are clear.
2. Select relevant workflow status from the drop down menu.
3. Select relevant broker from drop down menu and click search.

# Generating a payout letter and/or amortisation schedule for an existing agreement

Online payouts are available for qualifying agreements you or your firm has originated.

1. Click on the Home tab.
2. Enter the agreement number (E.g. AAU123XXX) for the contract you would like a payout figure for.
3. Set workflow status to 'Live Agreement'.
4. Set Broker to 'Any' and click search.

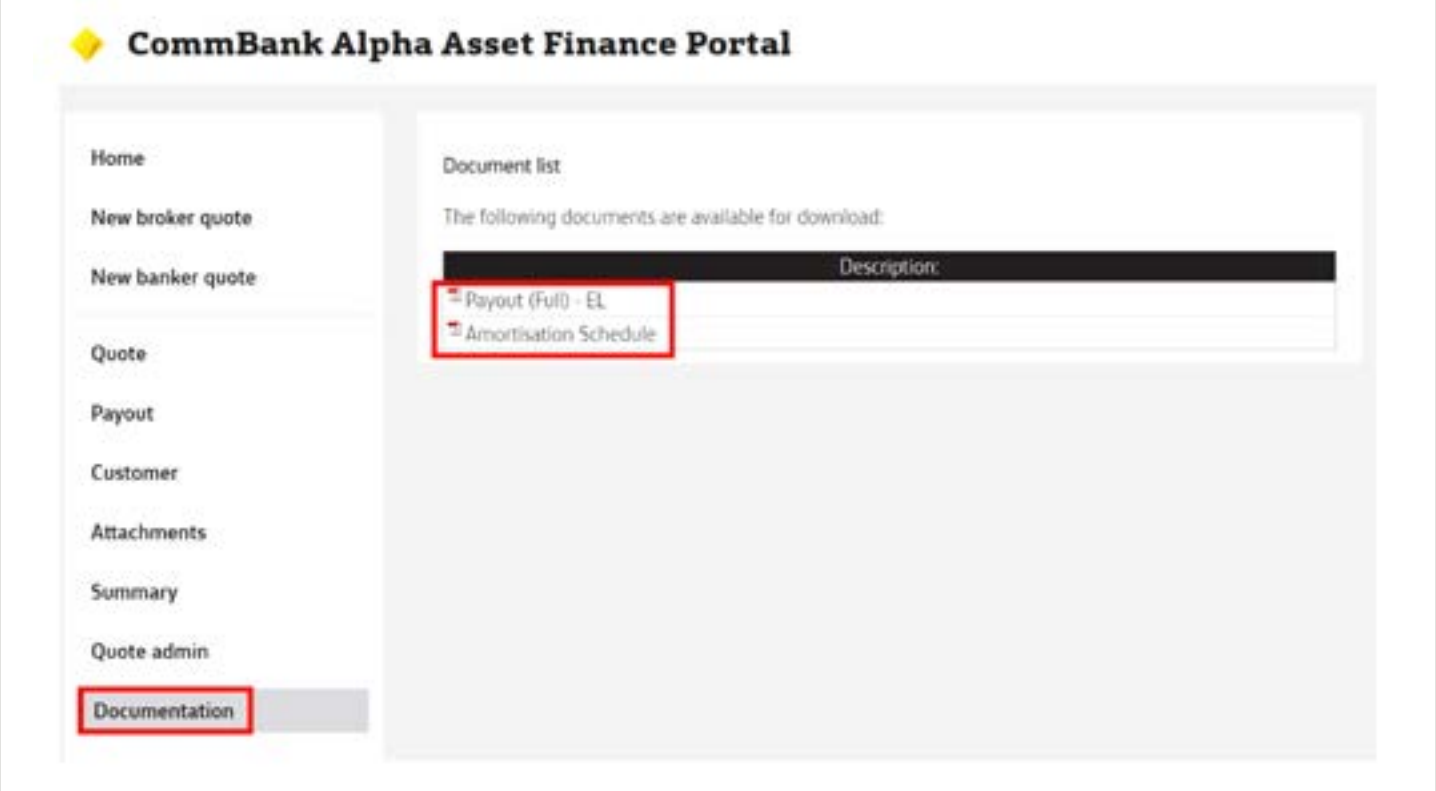
1. Open the agreement by clicking on the agreement number.
2. Click on **Payout** tab on left and then click ***Create***.




1. Payout details will now display

## 10.1 Download copy of payout letter or amortisation schedule

1. Click on Documentation tab.
2. Click on document titled **Broker Payout (Full)** and payout letter will now generate and become available on the screen.
3. Save a copy of the letter as required.




If you are unable to generate a payout figure please contact our Payouts team **brokerpayouts@cba.com.au** or your Business Development Executive

# Tracking the status of your application

You can track the status of an application by searching the agreement number or application name then referring to the Workflow status.

The originating broker will receive an email notification each time an application Workflow status is updated.