

CommBank Alpha™

Asset Finance Broker Portal

Broker User Manual

September 2024

Contents

We	lcome	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

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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 <u>AFBroker@cba.com.au</u>:

- 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 <u>https://www.commbank.com.au/business/commbank-</u> 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'.

DOMAIN		
AU		
USERNAME		
PASSWORD		

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.

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New quote	Oroker.	ary .			*	
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	A4U/171538 QUD1E	Quate	04/02/28	495,495.00		
	AAU/963772 QUOTE	Quote	01/12/20	340,000.00		
	AAU/Y582494 QUOTE	Quota	MG/ER/2H	11(222.00		
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	A407051214 00011	Quote	04/08/20	80,485-00		
	AAU/636301 QUOTE-	Querta	05/09/26	40,000,00		

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.

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	Quate number		
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	Workflow states.	Any except cancelled	1.00
	Brokerage		
	Start date	D0/MM/YVYY	
	Search		
	Cear		

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

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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.

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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:

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	Start data	99-04-240+ III		
	Services/htt		10	
	In annual or in advance	71 (01971)		
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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.

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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

Vehicle identification number (VIN):		
Chassis number:		
Road vehicle registration number:		
Road vehicle engine number		
Address line 1 (where goods are kept):		
Address line 2 (where goods are kept):	Suburb State Postcode	
Supplier name:		
Supplier ACN:		
Supplier ABN:		
Supplier address:		
Supplier contact name:		
Supplier email:		
Supplier phone:		

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.

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New quote	Application type	Statur Quar
	ABCD	Repyret
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a. ABCD Application type:

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Asset		New Commercial Customer - No Existing Commiliank Cammercial Facilities Refinence of Existing Commiliank Asset Finance Balkons and Resistual Values	a deter -	
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Application Type			Cuttomet rate (%	ê6
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			Bahoon (St.	
Attachments			Bahoon (%)	
Summary			Brokerage (S)	
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Documentation			Carvel guite	
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			Cripty content sport	ter .
Quote history				

- 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):

Home	Application type	10		Quote AAU/16720	068
New gutte	Application type:	Non ABCD		Status	Quite
	Non ABCD type:			Repayment	
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Asset		New Crimit Request Pull Application		Maturity date	
		National Approved Application		facin:	
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Customer				CBA rate (%)	
				Balloon (5)	
Attachments				Balloon (Nil	
Summary				Brokerage (G)	
Conditions				Brokeriege (ND	19
				Tool and	
Documentation				Carteri querre	
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On other Designation			L	Copy convert spin	da .
Quote history					

- 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.

Home	Related parties	Quote AAU/1672	968
New goote	Wristonikę type Name	Status	Oune
	Casterier Not assigned	Repayment	
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Quote history			

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 <u>ABN Lookup</u> 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 **<u>'Individual'</u>** party:

1. Click on *Create new* button.

Commonia A	lpha Asset Finance Por				
Hame	Related parties			Quote AAU/6720	68
New quate	Relationship type	Nate		Status	Que
Queta	4.02 3.672	Not assigned		Repayment Amount frammed	
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Asset	Cear			Term	
Application type	Custemer type:	Included		Customer rate (NJ	6
Customer	Search			CBA care (%)	
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Summary	Date of birth	01/01/2004		Brokenspe (S)	
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Quote history	Cienter men				

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.

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income and expenditure depletetion required.	NH	
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anthis living expenses (individual)		0.2
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elect mailing address		
Lame ad physical	2	

() 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 **<u>'Non individual'</u>** 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.

Rater	Belated parties		Gross Version 2008	
Now quelle	Bridsonile Lot	inter New .	Datu: Quite Reaction:	
Quelle	Address		insuthinat -	
Asset	Seech / cream		Halung bee	
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Application type	Commentaine Sales	Not installed include sale and anti-entity	Littere in N	
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	Loss 1		Later.	
Despreciation			Datust game	
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Quete hierory			Consumerations	

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

Harter			
New quote	Related parties		
Ouste	Relationship type	Network	
Asset	Add party		
Application type	Search / covate		
Custamer	Cutomer type	Nen individual (includes sele trader and partnership)	
Attachinerts	Search		
Summary	Ages		
Conditione	ACN .	3+4554636	
Documentation	Search		
Notes	Search results		
Quote Natory	Note	Addres	Number
	Dentities Search Epullie		

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

Horse			
New guite	Related parties		
Quarter	Relationship type Customer	Name	
Auset	Add party		
Application type	Search / smalle Clear		
Customer	Culturer type:	Non individual (includes sale trader and partnership)	
Attachments	Search		
Summary	ABN		
Conditions	ADI tane	3++55+556	
Documentation	Taurch .		
Notex	Search results		
Quote history	Name Dentries	Address	Narber
	Courts Lipster		
	Copyright ID Alfa AR Rights Reserved v3		

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

Hotie	Equiliar search unsuccessful, please count	a new successor
New gaste	Related parties	
Owte	Relationship type Customer	Name
Asset	Antiputy	Here's agent other
Application type	Third party type Ciner	
Customer	Organization type	
Attachments Summary		Lucied Company Other Incorporated Bioty Dher University of Today Partnership or Today Name
Conditions		Sole Tauter Truct Unicode Company with Shares Unicode Company without Shares
Notes		Contraction of the second second
Quete history		

- 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 <u>partnership</u> structure:

1. Select NON Individual Customer type Search via ABN

Hame	Relaced parties		
New quote	Tidutanaha soe Gustanar	Network	
Quarter	hitpaty	Not accurate	
Asset	Search J means		
	Dear		
Application type	Customer type	Nan individual (includes sole trader and partnership)	*
Contramer	Search		
Attachiments	481	84753903854	
Summary	ACN		
	Name		
Candition	Search		
Documentation			
Notes			
Questa Metory			
Gross meanly			

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.

Hame	Equifax search unsuccessful, please create	a new customer	
New quote	Related parties		
Quale	Relationship tope	Nate	
	Eastanner Privilles	Aut-specified	
Asset			
Application type	Third parts tipe		
	Cear	18	
Cavlamet	Organization type		
Attachovents		Loted Company	
		Char Incorporated Body	
Summary		Partnership to Trading Name	
Conditions		Tue -	
Documentation		Unitated Company with Shares	
		United Company without Shares	
Notes			
Queste history			
2010/07/2011			

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

Hortor	Related parties		
New quote	Relationship type	Kane	
Quote	Eutoner Att jante	Not specified	
Ausert	Third party type		
Application type	Char Drganization type:	Petheshp in Todog Name	
Customer	Death		
Attachments	Name	Mr John Smith and Mrs Jane Smith	
Summary	Legal details		
Conditions	ADN		
Documentation	- A89	86759600654	
Deconsentations	Business start date	0.010019	

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).

Hume New quote	Related parties		
New quote	Relationship type		
		Name	
Quality	Cutamer Add awter	Aut gesteel	
Annet	Third party type		
Application type	Character tube	Pertrephip or Tedrop Name	
		THE CALL OF CALL OF CALLS	
Customer	Details		
Attachments	Name	Mr John Smith and Mrt Jane Smith	
Summary	Legal details		
	ADN .		
Descurrent alloss	Adme	36755900454	
Contraction of the second s	Business start date	1349-0259 Accounting Services	
Conditions Documentation	ADN Jani		

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.

Home	Related parties		
New quote	Relationship type		
Quete	Cystomer Nat specified	tite juries Swith and Mos Jana Swith. "Not ecopyred	
Asset	Search / create		
Application type	Clear		
Customer	Customer type:	Translate I	
Attacherante		ter residue onduces sale bader and partnerships	
Summary			
Conditions			
Documentation			
Notes			
Quote history			

Hote	Rolatest parties		
New quota	Relationship type	Net	
	Cutumer	All John Styles and Mrs Jane Smith	
Quate	Not uper their	Red assigned	
Avail	Add party Remove		
April 1	Search / create		
Application type	Clear		
Custamer	Cuttomin type:	Polydual	*
Cartanan	Search		
Attachments	Fittname	Jahn -	
Summary			
	Let rene	2mm	
Conditions	Date of brits	01/01/2006	
Documentation	Smarch		
	Search results		
Notes	2011 A 1986		
Quate Mixtory	2 entries	Adhes	Nuriber
	Create new		
	County of the		

Home	Related parties		
New goote	Relationship type	Name	
		Smith and Misulaire Smith - ack Smith	
Quote	Add party Remove -	and Animan (
Avert			
Application Type	Third party type Cites		
white must all the	Customer tope	Individual	
Customer	Pressandia	Account Molder	
Attachments	and a second sec		
	Customer details		
Sommary	Trie	Attr.	
Conditions	First name.	alter	
Documentation	Other names known by iff whili		
The second second second	Mode rane	aci	
Notes	Latinana	SNR	
Quote history	Residential status	Montgage	
	(refuting)	Accommodation	
	Denter:	Male	
	Date of Grm.	010/2006	
	Current maintal status	Marred	
	Driver's Romon	464575s	
	Driver's Statute state of sover	ve	

Home	Related parties	
New guote	Relationship type Customer	Mana Mana Mits and Mits and Sinstein
Quote	Account Holder Not (people)	Wildon auf Smith
Areast	Add party Remove	
Application type	Search / create	
Costantes	Crather type	
Attachments		Privile Contract of Contract o
Sommary		service and partnership
Conditions		
Documentation		
Notes		
Quote history		

Then add account holder

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

Home	Related parties		
New goote	Relationship type	Nana	
		inn Smith and Mits Jane Smith	
Oute		in tala Smith	
	Account Holder	Jamice Smith	
Asset	400 Delta 100004		
Application type	Third party type		
and the second se	Des:		
Costomer	Cultorter hore	Individual	
Attachments	Relationship	Account Holder	
Sommary	Cultomer details		
Conditions	T de		29
	First name	Jana .	
Documentation	Other names known by Uf any I		
Notes	Middle name	Janua .	
A. L. Martin	Latinama	Seem.	
Quete history	Residential datus	Snongege	
	Industry	Accemendation	1
	Lender	Female	
	Date of birth	(0)(0)(0)00	
	Current marital casus	Mariad	
	Driver's Romon.	(3+++52)	
	Driver's litence state of tope	W6	

To set up a <u>sole trader</u> 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

Commonte Alpha	Asset Finance Portal			
lone	Related parties			
New quote	Relationship (Not excepted	New	
Doote	Allipeto			di.
laset	Search / sheate			
Application type	Deel Contribution type:			
Costumer				
Machinesits		(1) Non A	ndividual (includes sole bader and partnership)	
summary.				
Conditione				
Documentation				
Notes				
Questa history				

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.

None			
New quote	Related parties		
Quete	Rokowskie type Californie	New	
		Not any feed	
Assert	Add party		
Application type	Search / stream		
	Der		
Costaner	Cutomer type	Non individual includes sole trader and pertnershipi	
Attachments	Search		
Sammary	48%	45469469449	
Provide Law	ACVE		
Conditions	Name		
Documentation	Taxanto		
Notes	Search results		
Quote Metory	Nere	Addea	Humler
	d entries	and an	

- 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.

Horter	Equilar teach university, please could a new sustainer
New quote	Palated parties
	Relationship type Name
Quote	Cutome Not sected
Avart	And parts
Application type	Third parts type Chair
Cawterner	Organisation type:
Attachemots Sommary Conditions Documentation Notes Quote history	United Company Other Honorporated Body Other Unincus posteriol Association Spec Tradies United Company with Shares United Company withour Shares
	Copyright & Alta All Rights Reserved (3D bold 588

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'.

Name	Related parties		
New quote	Reliadonship type Customer Mill John	Nane Jack Smith	
Quate	Addperty		
	Third party type		
Asset	Oter		
Application type	Digestation from	Sole Trader	
Customer	Customer details		
Attachments	Tde	M	
Summary.	Ristrane	.ave	
and a second sec	Other names known by (if any):		
Conditions	tridde tame	.045	
Documentation	Last name	SHP	
	Residential status	Mortgage	
Notes	industry.	Automotive Repair & Services net	
Quate history	Gender	Male	
	48%	ASASSASSAS	
	Full trainess neme (Fany) under which customer ca trusmess	rat (in Nex.	
	Data of Sirth.	01/01/2006	
	Carrient mental status	Mariel	
	Driver's Roence	Methers.	
	Druw's literce state of source	V4	

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.

Home	Related parties			
New goste	Relationship type	a second s	Name	
Quote	Commer Account Holder	Ne John Jack Smith John smith		_
Asset	Actionary Remove			
Avset	Third party type			
Application type	Chear			
Customer	Cuttomer type	Individual		
Contractory.	Relatorship	Account Holder		

To set up a <u>trust</u> structure:

1. <u>Select Customer Type "Non Individual from drop down box</u>

Home	Related perties		
New quote	Relationship type Comprise	Not assigned	
Quole	Add party	net assigned	
Avert	Search / create		
Application type	Cent Existence type:		*
Customer		and a second	
Attachments		non individual sincludes sole trader and pertnerships	_
Summary			
Conditions			
Docomentation			
Notes			
Quote Testory			

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

Related parties		
Relationship hore	New Concession	
	Not eargeed	
	New reductual includes sale trader and histoireithal	
Search		
AllN	0+0+0040400	
4274		
Name		
Search		
Search results		
Nene	Addrem Muribe	ŧ
2 HOWS		
	Related parties Relationships how Relationship Relationship Center	Related parties Reference in none Reference Relation in none Relation in

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

Home	Equifus orach unsuccessful, please cause	a new customer	
New quote	Related parties		
Queter	Relationship type - Customer	None None	_
Asset	Addr.parts		
Application type	Third party type Date		
Custamer	Organisation type	[8
Attachments Summary Camiltions		Under Company Other Incorporated Rody Other University of Tasking Name Sale Tasker	
Documentation		Dust Onep for Company with Shares Unitsted Company without Shares	
Notes			
Quote history			

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

Home	Related parties		
HUTHE			
New guote	Relationship type:	Name .	
Quote	All perty		
0.00	There party type:		
Asset	Der		
Application type	Digensiation type:	Trat	
Cestaner	Legal detafls		
Attachments	Name of Student	Smith Phy Link	
Summary	ACN		
Solorary	4871	5+5+55+6+5	
Conditions	Business start slate:	alalades	
Documentation	inductivy hyper	Juspinistile Repair & Services res	100
Notes	Full principal place of business address		
Quote history	Mafou-sybe		
	Malbo-number.		
	DALTADE		
	Unit number		
	Building / Street name		
	Level		
	Contains no Strives number or type		
	Building / Street surplus:	727	
	Street	Colors .	
	Street.spec	Street	
	Subutt	DOOKLANDS	
	State	144	

frust name:	Smith Family Trust
Fiading as	Smith Family Trust
Furnover information	
lumovel Amount:	1,000,000 00
furnover Number of Months.	12
Financials Dated	30/06/2023
income and expenditure for above	
s income and/or Expenditure declaration required	Yes v
Aonthly income available for debt servicing	12500
Monthly existing & proposed loan commitments.	6323
Contact details	
Trole	w
Vill name	John
last name	Smith
Contact address:	727 Collins St. Docklands. Vic 3008
Nork phone:	
	0411000000
Mobile phone	
Mobile phone Email address	alphatest@test.com
mail address:	Director ~

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.

Hume	Related parties		
New quite	Relationship type	Nete	5
Oute	Addparty .	Not assigned	_
Asterl	Search / creater Chair		
Application type	Customer type:		¥
Coloner		(reinder	_
Attachments		ten witketue include site tabe and perfective	
Summary			
Conditions			
Documentation			
Notes			
Quade history			

None	Equitax search sesuccessful, please create	a new cubicamer	
New quote	Related parties		
Quarter	Relationship type	Not specified	
Asset	Cuttomer Add perty	Net apected	
Application type	Third party type Clear		
Contorner	Organisation type		
Attachments Summary Conditions		Usted Company Other Incoderated Body Other University and Association Performing an Trading Name Sole Tradie	
Documentation		Plant Concern with Shares	
Notes			
Quote history			

Relationship: select Account Holder

Home	Related parties		
New quote	Relationship type	Smith Ramaly Toust	
Quote	Costomer Account Holder	anno anna can Na specied	
Amet	Add party Remove		
Asset	Third party type		
Application type	Clear		
Customer	Organisation type	Unicated Company with Shares	
Castaner	Relationship	Account Holder	

1. Complete all fields for the trustee

	National partner		
thate	factory participation		
New golds	Riskursha ture	1 Alexandre State Stat	
	Lateres Record Addre	240 M/0 Tot 240 M/0 Tot	-
(Carlot)	and party thermal		
Aust			
Application from	Prest party tales		
	Operatornae	united Campon with Terms	
Extense	history a	and of Hole	
Attaches and		and states	
C 13 C 26 C	Dean.		
Services	land.	Seat Ay Up	
Cambringua	Lagat Broats		
Desenation			
	201	pome	
Notes	10.		
Quele Rollery	Normal cart deal	10.0211	
	14.01.108		
	Rul principal place of terroreau address		
	Carlier Low		
	Table white		
	anna		
	100 million		
	By Ming / Direct name		
	44		
	Content on Treat survive or Treat		
	Builty Creativity	17 ·	
	Dee	- University - Contract of Con	
	Dation	25mml	
	and the second sec	DOCHES .	
	244	R.	
	formale.		

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

Histor	Related parties			
New quote	Relationship type:	Marco selo c	Netter	-
Quella	Account Account Account Account Account Account	Smith Ramily Toute Smith Pty Lad Net assigned		
Asset	Addparty Remove			
Application type	Search / create			
Cestumer	Contorner type:	1		*
Attachments.		individual		
Summary			V inclutes sole mater and partnership!	
Conditions				
Documentation				
Notes				

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.

Hume	No attachments allowed on unsaved proposal	
New quote	New Ne attachment	
0.000	Plasse uplied here all documents to support this application, including but not limited to proof all income, dentity werfulation document, including and teaching werful and the proof all income attach logical cultures the mentation.	
Outer	Elevent when prove that will do use and	
Asset	Uplinet	
Application type	(Choose Fier) No the chosen	
	Deutotor	
Costomer	Phylad been reducted if required	
Attachments		
Summary	No attactment found	
Province A		
Conditions		
Documentation		
Rider		
Notes		
Quote history		

Section 7

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.

Hame	Protochoge	BuvomentQuan		Qupe A4U/6720	66
Newgente	Aust thrain			264	0.009
	lor lor	Decision	and the second se	Replayment:	1,40730
Quete	Ges	Secure Carolia	19,500.00	Amount franced	80,005.05
Asurt	Cart	Rome Carry	44 501 10	Maturity date:	19/1-22
(deal)	Term detaile			Term .	90
Application type	Sactore	0404/3034		Colorer of N	1.830
Customer		State Sec.		dance w	12.20
S. Some	Terri Decrititi	in adapte		Balleen (D)	25,816,52
Attachments	in a sensi du si advansi.			beinge für	30.00
Sennery	Agapter Beganny	Manifuy		briese C	17940
	Balton repairient		20.00 %	brings for	100
Conditiona	Income and expenditure summary				

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

Hutter	Carsel Cardina		
	Equipment details		
New quote	Poductipe	Epulpment Loan	
Quate	Finance details		
Asset	Purchase price (Inc), (037)		68,500,00
	Deposit / trade-in		800
Application type	Vietar vehicle vegichation carts		200
Customer	and should all the series		
Attachments	Term details		
Attachments	Start data	09/04/2024	
Summary	Term (month)		60
Conditions	in annan lar in Advance	in advance	
	Repartment Responds	Monthly	
Documentation	Before represent.		90.00 %
Notes	Income and expenditure summary		
Quarter Nextory	income and expensione summary		

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.

Credit application and privacy consent
Please confirm that the following individuals have signed a credit application and privacy consent form.
worked capes at all devices documents insist be admitted with the sonthart
Phase control that the applicants and guarantees have been informed that.
- Personal information is satisfied for the purposes of assessing their application for medic, failure to provide sufficient information responses the application carried, annual
-Personal Mometon may be dolltared to credit providers, who may in turn docksie the personal information to its related entities for productial and administrative property.
- Ordel checks may be served suit and personal information disclosed to a credit reporting agency, and they may access that personal information at any time
Canar Confeet



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.

	200.000	
Home	Document list	
New quete	The following documents are available for download:	
Quate	These Constand Approval - EL	
Quote	BASS ABCD Application	
Avset	P Boker Indicative Quote - EL	
Application type		
Custamer		
Credit declaion		
Attachments		
Sommary		
Conditions		
Documentation		
Notes		
Quote history		

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.

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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.

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

Home	Payout putta
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Quete	Disate star prejout quote(1) for agreement AAU16600577 Disate
Asset	If this payout is being requested for invariants purposes, please send an email to Asset France Lending Solution buile taxout places on au to record a period.
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Notes	

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.

Home	Document list	
New broker quote	The following documents are available for download:	
New banker quote	Payout (Ful) - EL	
Quote	TAmortisation Schedule	
Payout		
Customer		
Attachments		
Summary		
Quote admin		

() 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.

Home	My quotes					
New quote	Quote number:					
	Oustomer name					
	Workflow status		Proposal Credit Approved			
	Broker		40Y			*
	Start date		00/MM/YYYY			
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	Quote numbe	customer name	Workflow status	Start date	Amount finen	ced -
	AAU1519716	TAU1432316 Name	Credit approved in Commisee	28/09/19	1,000.00	
	AAU151971A	TAU1632315 Name 1 to 2 of 2 entres Back 1	Credit approved in Commisee.	25/09/19	1,000,00	

