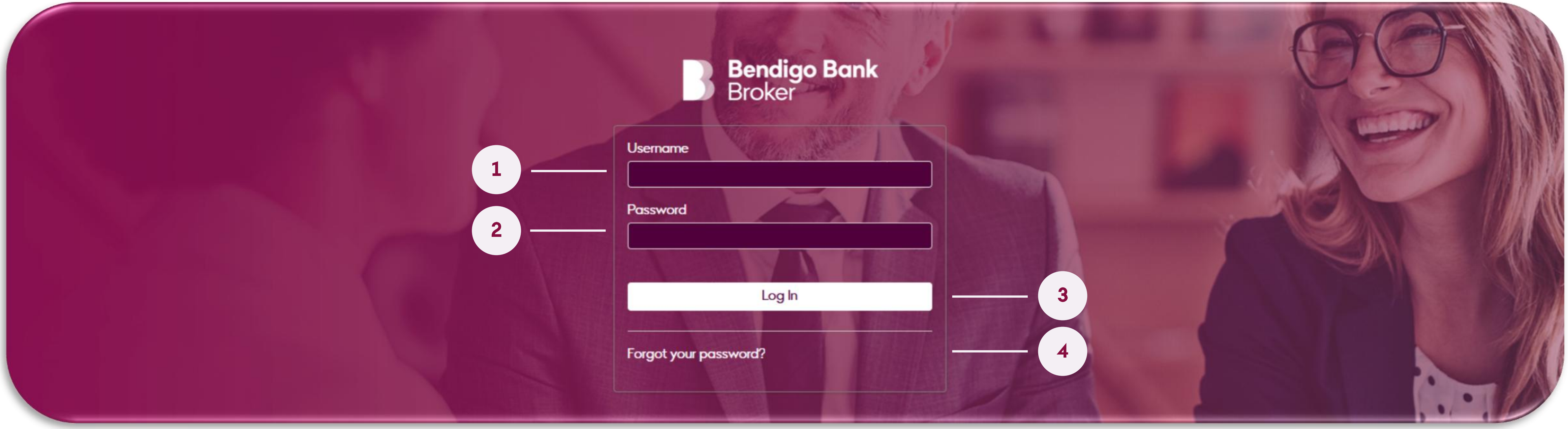
Broker Portal Navigation Guide

Bendigo Bank Broker

September 2026

Login Screen

Use this screen to access the Broker Portal with your registered credentials.



1 Username

Enter the username registered to your Broker Portal account.

2 Password

Enter your Broker Portal password.

3 Login

Select Login to access the Broker Portal.

4 Forgot your password?

Select this option to reset your password.

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Multi-Factor Authentication (MFA)

MFA is required for all users to help safeguard customer data and ensure account security.

Download the App:

Install the free Salesforce Authenticator app from the Google Play Store (Android) or App Store (iOS):

salesforce

Google Play

App Store

Follow the setup guide:

Access the step-by-step instructions to link the authenticator app securely to your broker portal account by clicking on the image below:

Process for using MFA authentication

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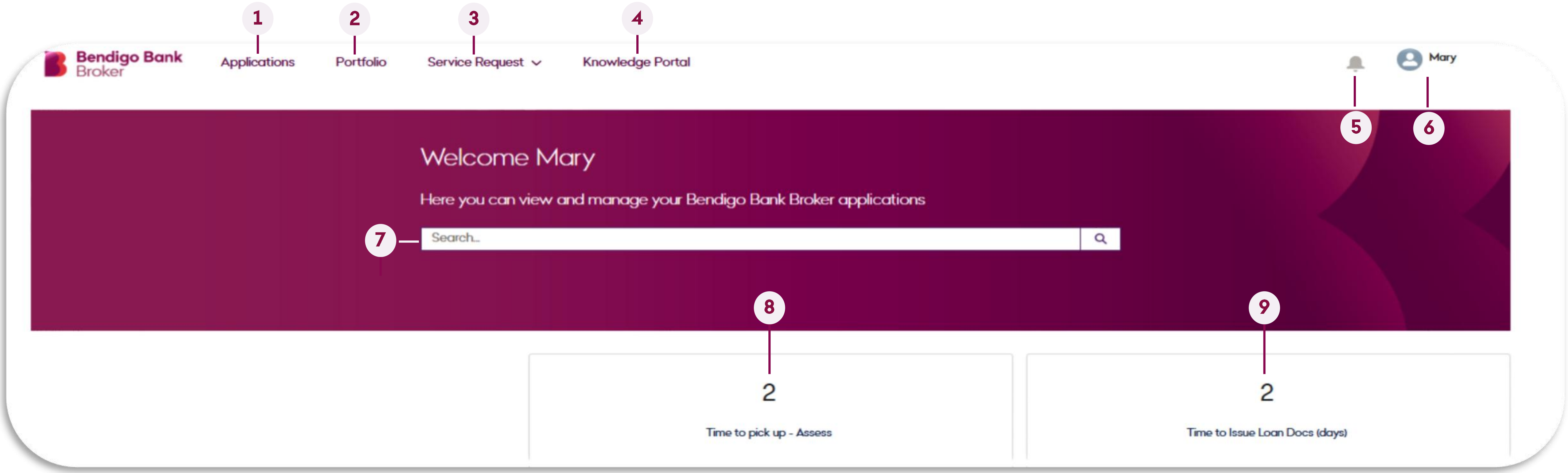
Home Screen

An overview of the Home Screen and key navigation areas.



1 Applications

Access and manage applications.

2 Portfolio

View your portfolio and related records.

3 Service Request

Submit and manage service requests.

4 Knowledge Portal

Access FAQ's, guides, forms and calculators.

5 Notification Bell

View all notifications and important updates.

6 Profile

Access profile informationn.

7 Search Field

Search for application records.

8 Time to pick up - Assess

Current time to pick up an application for assessment.

9 Time to issue loan docs

Current time for loan documentation to be issued.

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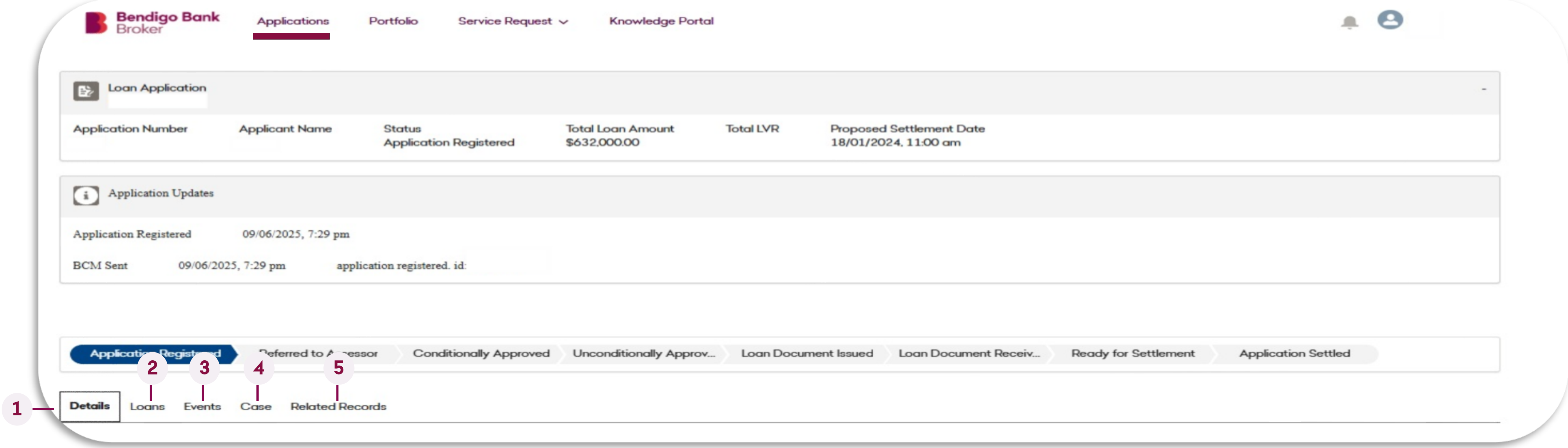
Applications

The applications tab provides a summary of your submissions.
Select the hyperlink for each application to display further information.



1 Details

Applicant details, Application status, Loan details, Proposed settlement date.

2 Loans

Financial accounts with breakdown of product split associated with the application.

3 Events

Chronological history of key events and milestones associated with the application.

4 Case

Raised Service Requests related to the loan application.

5 Related Records

Loan application securities, Communication logs.

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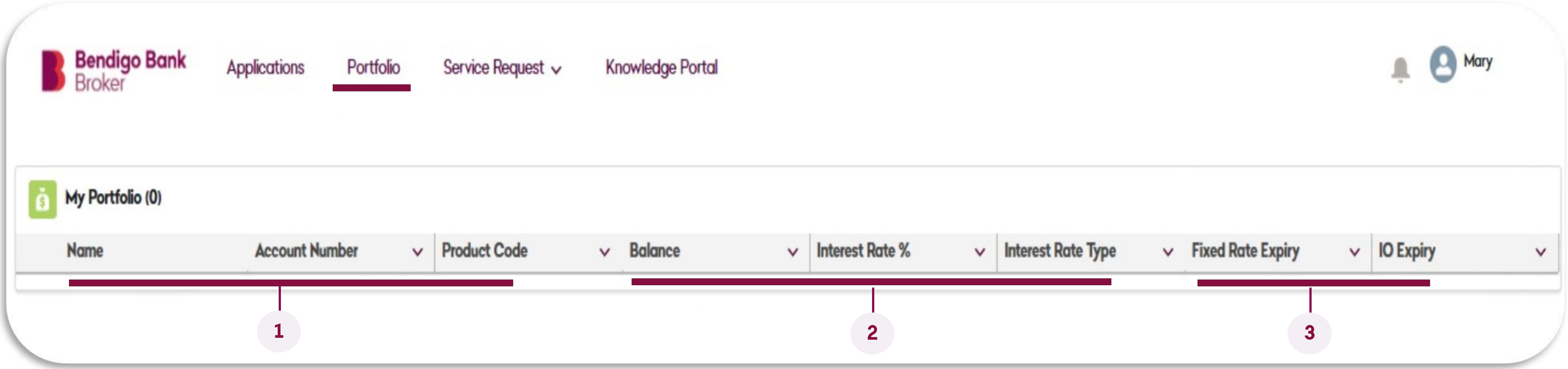
Portfolio

The Portfolio screen provides a complete overview of your loan portfolio and key account information.



1 Account and Product Details

View key account and product information, including customer names, account numbers and product codes.

2 Financial Snapshot

View loan balances, interest rates and interest rate types.

3 Critical Milestone Dates

Track upcoming Fixed Rate and Interest Only expiry dates to identify retention and refinancing opportunities.

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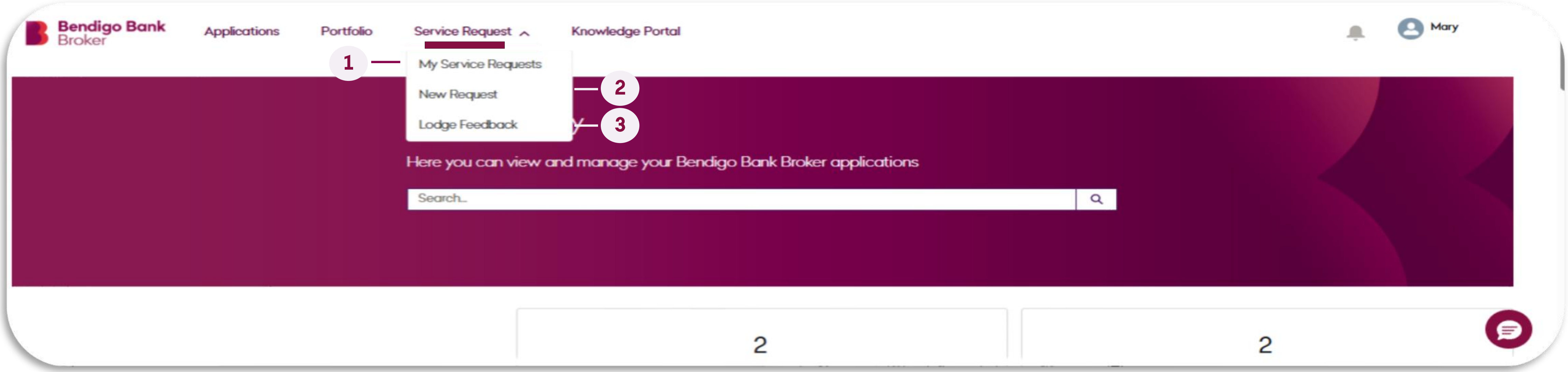
Service Requests

The Service Request tab gives you access to lodge, track and manage your enquiries.



1 **My Service Requests**

View existing Service Requests.

2 **New Request**

Lodge a new Service Request. Select the relevant request type from the drop-down menu, such as Application Help, Scenario or Other.

3 **Lodge Feedback**

Provide a compliment, suggestion or complaint regarding an experience.

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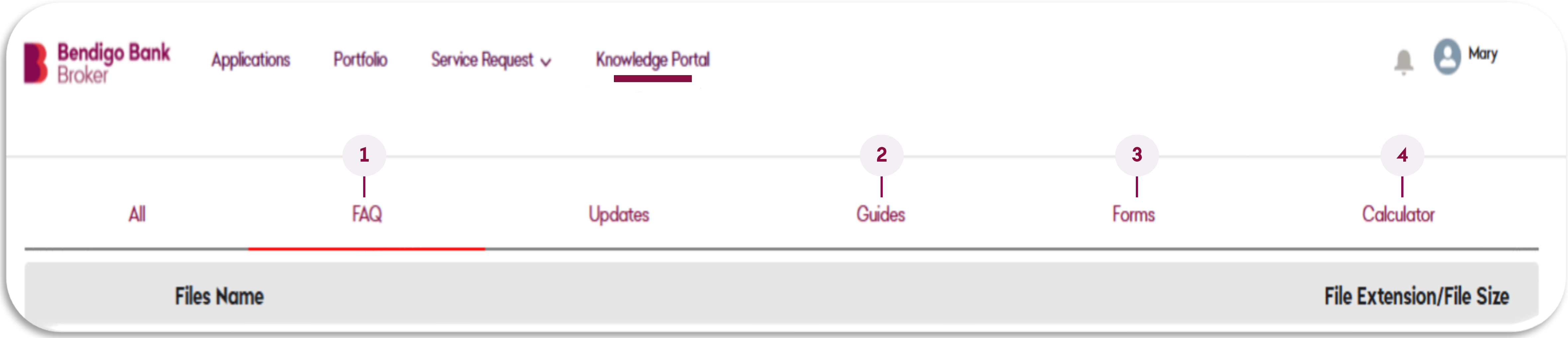
Knowledge Portal

The Knowledge Portal gives you instant access to FAQ’s, handy guides, key forms, and interactive calculators to support your everyday workflow.



1 FAQ

Get answers with detailed fact sheets on specific loan products and find clear breakdowns of fees and charges.

2 Guides

Access guides, policy documents, and submission checklists covering everything from security and income verification to responsible lending and using digital tools.

3 Forms

Download essential, up-to-date forms.

4 Calculator

Use interactive tools including calculators for serviceability, Lenders Mortgage Insurance (LMI), and year-to-date income.

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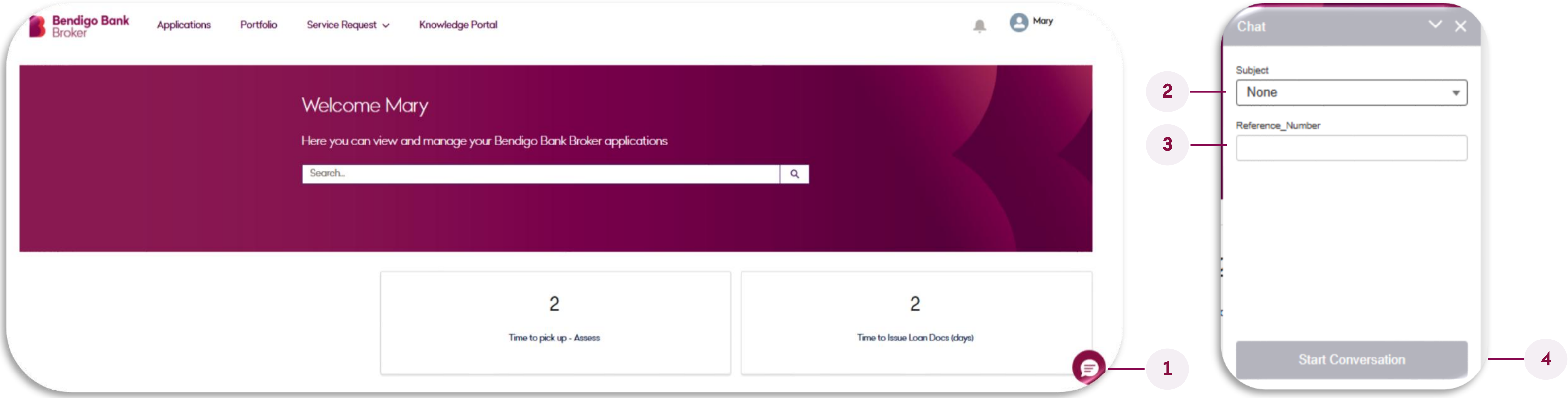
Web Chat

Chat directly with the Partner Assist team in real time during business hours for quick answers and support.



1 Web Chat Function

Opens the Web Chat function to chat with Partner Assist.

2 Subject Field

Select an appropriate topic of chat from the drop-down list.

3 Reference Number

Enter an applicable loan application number (this field is optional).

4 Start Conversation

This will commence the chat, and you can enter your text in the “start a new chat” field.

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