

Broker Portal Navigation Guide

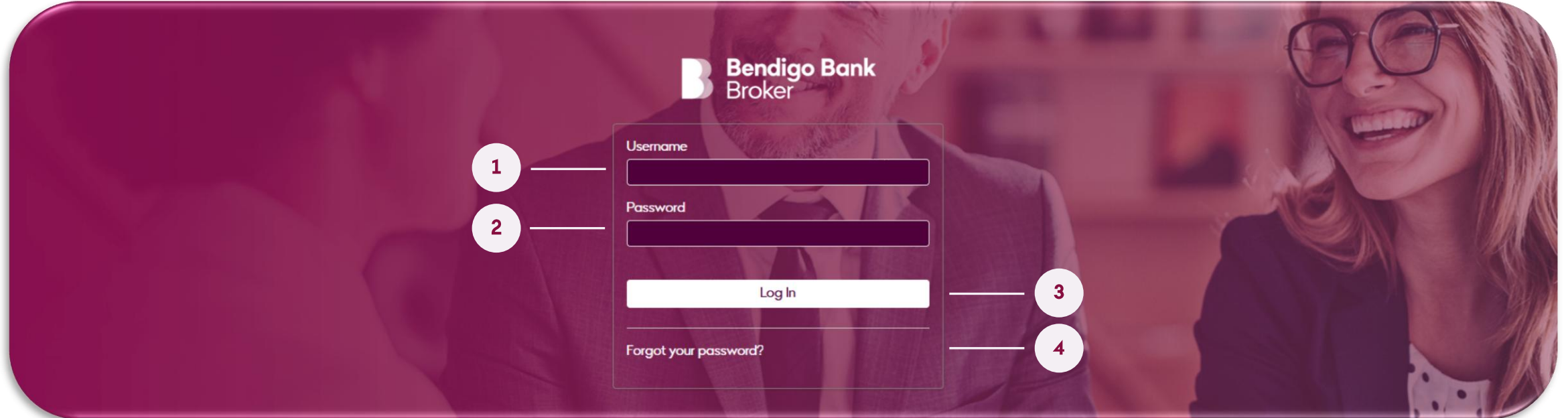


Bendigo Bank Broker is a division of Bendigo and Adelaide Bank Limited, ABN 11 068 049 178 Australian Credit Licence 237879

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Login Screen

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

A screenshot of the Bendigo Bank Broker login screen. The background is a blurred image of a smiling man and woman. Overlaid on this is a white login form. The form has a 'Bendigo Bank Broker' logo at the top. Below the logo are two input fields: 'Username' and 'Password'. Below these fields is a 'Log In' button. At the bottom of the form is a link that says 'Forgot your password?'. Four numbered circles (1, 2, 3, 4) are placed around the form, with lines pointing to the Username field, Password field, Log In button, and Forgot your password? link respectively.

Bendigo Bank Broker

1 Username

2 Password

3 Log In

4 Forgot your password?

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.

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):



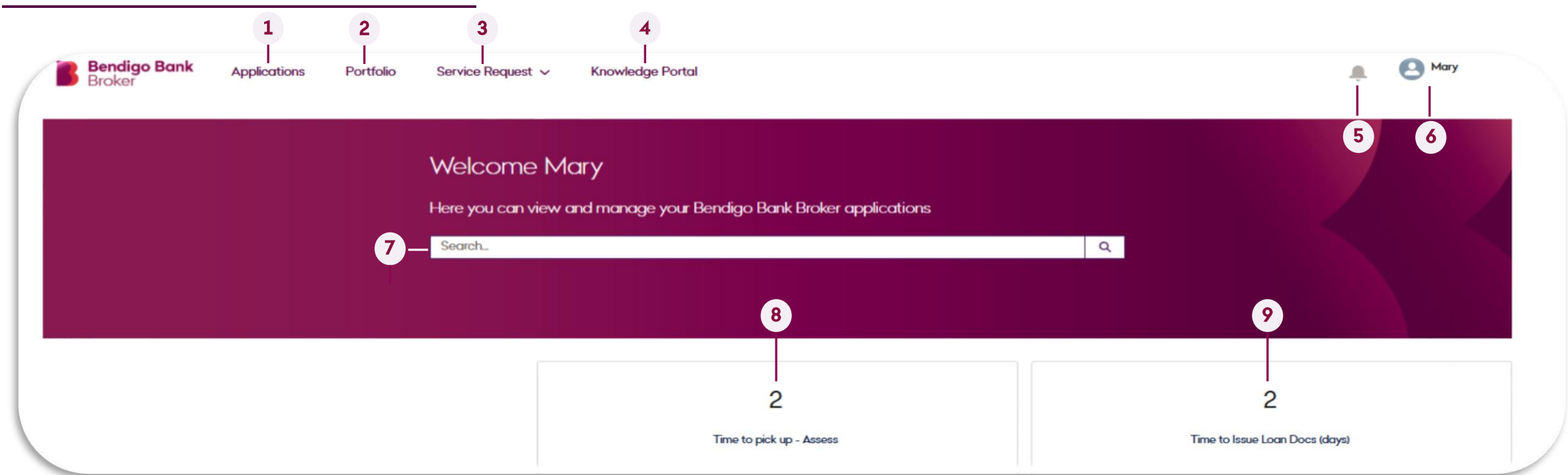
Follow the setup guide:

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



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.

Applications

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

Applications

Portfolio

Service Request

Knowledge Portal

Loan Application

Application Number	Applicant Name	Status	Total Loan Amount	Total LVR	Proposed Settlement Date
		Application Registered	\$632,000.00		18/01/2024, 11:00 am

Application Updates

Application Registered09/06/2025, 7:29 pm

BCM Sent09/06/2025, 7:29 pmapplication registered. id:

Application Registered

Referred to Assessor

Conditionally Approved

Unconditionally Approv...

Loan Document Issued

Loan Document Receiv...

Ready for Settlement

Application Settled

1

Details

2

Loans

3

Events

4

Case

5

Related Records

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.

Portfolio

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



Applications

Portfolio

Service Request ▾

Knowledge Portal

 Mary

 My Portfolio (0)

Name	Account Number ▾	Product Code ▾	Balance ▾	Interest Rate % ▾	Interest Rate Type ▾	Fixed Rate Expiry ▾	IO Expiry ▾
1 2 3							

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.

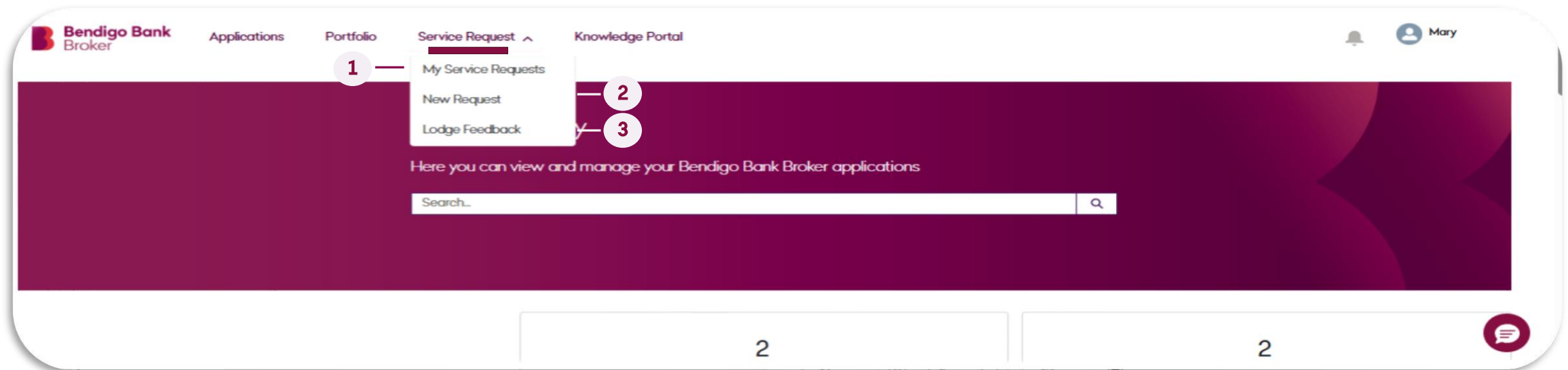
3

Critical Milestone Dates

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

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.

Knowledge Portal

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

ApplicationsPortfolioService RequestKnowledge Portal

Mary

1FAQ

2Guides

3Forms

4Calculator

Files Name

File Extension/File Size

1FAQ

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

2Guides

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

3Forms

Download essential, up-to-date forms.

4Calculator

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

Web Chat

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

The screenshot shows the Bendigo Bank Broker web interface. At the top, there's a navigation bar with links: Applications, Portfolio, Service Request (with a dropdown arrow), and Knowledge Portal. On the right of the navigation bar, there's a notification bell icon and a user profile icon labeled 'Mary'. The main content area has a dark blue header with the text 'Welcome Mary' and 'Here you can view and manage your Bendigo Bank Broker applications'. Below this is a search bar with the placeholder text 'Search...'. At the bottom of the main content area, there are two white boxes. The first box is labeled '2' and contains the text 'Time to pick up - Assess'. The second box is labeled '2' and contains the text 'Time to Issue Loan Docs (days)'. In the bottom right corner of the main content area, there is a red circular icon with a white speech bubble, labeled '1'. To the right of the main content area, there is a detailed view of the chat form. It has a title bar 'Chat' with a dropdown arrow and a close button. The form has two fields: 'Subject' with a dropdown menu showing 'None' (labeled '2'), and 'Reference_Number' with a text input field (labeled '3'). At the bottom of the form is a 'Start Conversation' button (labeled '4').

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.