mycrm

MyCRM BEST PRACTICE QUICK GUIDE

Client to Lodgement

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Client to Lodgement

1. Create contact

click **new** option
click **new contact**
select client type, then complete
- Person 1 details;
  (email & mobile essential)
- Communications (address);
- Options;

Save and continue

Prompt - select **create deal**

2. Create deal

complete
- Deal name;
- Deal type;
- Pipeline status;
- Purpose;

Save

Prompt -select **send Hello Pack**

3. Hello Pack

Check/edit broker message
toggle on for
- Hello Book;
- Credit Guide;
- Upload add documents (if app);
- Privacy Consent and Online Fact Find;
- Document request;
  Select FileInvite templates (if applicable)
- Set reminders;

Review and send then **send**

Prompt - open **FileInvite** request

Add data to either **application record** (e.g. financial position) OR **Client record** (e.g. assets etc.).
Data will auto-fill into each.

When Privacy Consent received from all complete **Credit Check.**

When information received from Online Fact Find complete.

4. Goal Setter

Quick actions - **Goal Setter**
complete
- Goals;
- Preferences;
- Profile;
- Future Plans;
- Services (if app)

Goal Setter can be completed earlier if information known. Information captured will flow through to the loan application.

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5. Complete Loan Tools

- Funding Calculator;
- Product Finder; &
- Serviceability.

Save each to deal

OR

6. Complete the scenario builder - Complete the scenario builder which can be launched directly from the application tab within the deal. This tool is the funding calculator and product finder in one

7. Complete all tabs within the loan application

-Customer objectives
- Adverse changes;
- Loan structure;
  complete all sections (200 word min to submit) and
- Future goals and referrals.

8. Generate Game Plan

- Broker message;
- Fees and comms; **next step**
- Send via eSign
- Download and review Game Plan;
- click acknowledgement

Send via eSign

Important Note - The Game Plan must be signed prior to or same day as any lender forms to be signed. You cannot lodge an application in Apply Online prior to Game Plan acceptance.

9. Submit to Lender

(Lodgement)

Handy Hint - Ensure you upload your supporting documents prior to lodging to Apply Online. Upload your documents to the documents tab against the deal.

Simply click **Send to Lender** against any document you would like to flow through to the supporting documents tab in Apply Online .

BEST PRACTICE TIPS

The **Best Practice Quick Guide** reflects best practice for MyCRM HOWEVER we also say 'Best PRACTICE' is relevant to your business and your processes. Essentially, use the Best Practice Quick Guide as a starting point then add/change steps/actions depending on your business needs.

When combined with Best Practice, MyCRM Tools such as Hello Pack, File Invite & eSign create even greater efficiency in the Application process.

IF your current process doesn't suit MyCRM Best Practice, start by adding components into your process (e.g. Hello Pack) and gradually build from there.

Also refer to the other MyCRM Quick Guides covering individual components of this process.

- Use Tasks to support your processes for completing and starting the next activity. Mark Tasks as completed to retain a chain of activity.
- Not all options (toggles) need to be active in the Hello Pack (e.g. If meeting the client F2F, you may only want to send Hello Book & Credit Guide.
- Manual steps within the process should be considered a contingency OR meeting a specific client need. Ensure any manual steps/actions are documented in Notes.
- Use File Invite proactively to oversee the collection of documents..
- Use the Goal Setter earlier in the process if needed.
- Use the BID Helper function in the Application Record>>>Application Tab to form quality notes.

Good Practice Quick Guide

1

Create Contact (Client)
Add additional Adults/Children
Name/DOB/Gender & Contact Details
Address
Source & Segment
Next

Create Deal (Application)
Application Name (create a naming convention)
Deal Type, Pipeline Status & Purpose
Next

Create Hello Pack
Recipients
Intro Message customise as required
Hello Book (Yes)
Credit Guide (Yes) forms part of Hello Book
Calendly (Yes/No)
Uploaded Documents
(e.g. Discharge Authority/Fixed Rate Fact Sheet etc)
Privacy Consent & Fact Find
Select Information required Options
Document Request
Client uploads to Fact Find
Generic document list/Direct upload to Fact Find/no notification
Send client a File Invite request
Specific template request/TFN Redaction/Notifications & reminders
Select Reminders
Save as Default
Review & Send

Application (Deal) record will now open

2

Complete additional Application details (if available)

Send Request Privacy Consent if required (i.e. unsigned consent)

When client has completed Fact Find *(view Fact Find)*

Click Launch Goal Setter
Quick Actions Application Record
Not mandatory as can be completed within the Application
Completes specific BID questions
Goals
Application Goals & Objectives
Preferences
Feature Preferences (Rate/Repayment & Special Features)
Future Plans
Summary/Home/Investment/Family & Lifestyle/ Assets/Wealth Creation & Other
Retirement Plans

3

Undertake Application Research

Application Record/Summary Tab
+ Run Serviceability Calculator
Save to Deal
Complete Lender Serviceability
Save in Documents Tab (Application)
+ Funding Calculator
Create various Funding Calculations (e.g. 90%, 80% etc)
Save to Deal
+ Product Finder
Create various Product Searches (e.g. Fixed, Variable)
Save to Deal

Application Record/Application Tab
- Add/Remove Borrowers/Guarantors
- Complete Customer Objectives

Complete Customer Objectives

Check Financial Position

Complete Possible Adverse Changes

Complete Funding Details

Complete Loan Structure
Add Loan Facilities
Use Product Finder saved to Deal
Conflicts of Interest
Lender & Product Selection Rationale

Third Party Services

4

Generate Game Plan & Send to Lender

Application Record
Generate Game Plan
Check/Edit Commission, Fees and Referral Detail
Check/Edit Broker Message
Click *send via eSign*

Download and Review Applicant Game Plan
and Guarantor Game Plan if necessary

Send Via E-Sign
E-Sign subscription must be activated
Profile Management/Your Settings/Subscriptions + Plug-Ins

Once Game Plan signed by all parties
Check in Documents Tab that Game Plan status is **COMPLETED**

Complete **Declarations**

Complete **Broker Notes**
Make sure any documents to be sent to Lender are ticked ***Send to Lender*** *in Documents Tab*

Submit to Lender
ApplyOnline or LoanApp (Simpology)

Now **Click** into either ApplyOnline or LoanApp and edit/upload to finalise to Lender