firstmac onTrack

Login to onTrack

Email:

Password:

Log In

I've forgotten my password

First time user of onTrack? Click here

firstmac **onTrack**
User Guide

Contents

What is onTrack?

onTrack is our secure online portal for your customers to access their loan agreement and provide details required for settlement.

onTrack works on any computer or tablet, so your customer can access their documents electronically at the time and place that suits them.

onTrack is only available to individual applications at this time. SMSF, Company and Trusts applications will continue to be delivered by email.

## Accessing Documents in Broker Tools
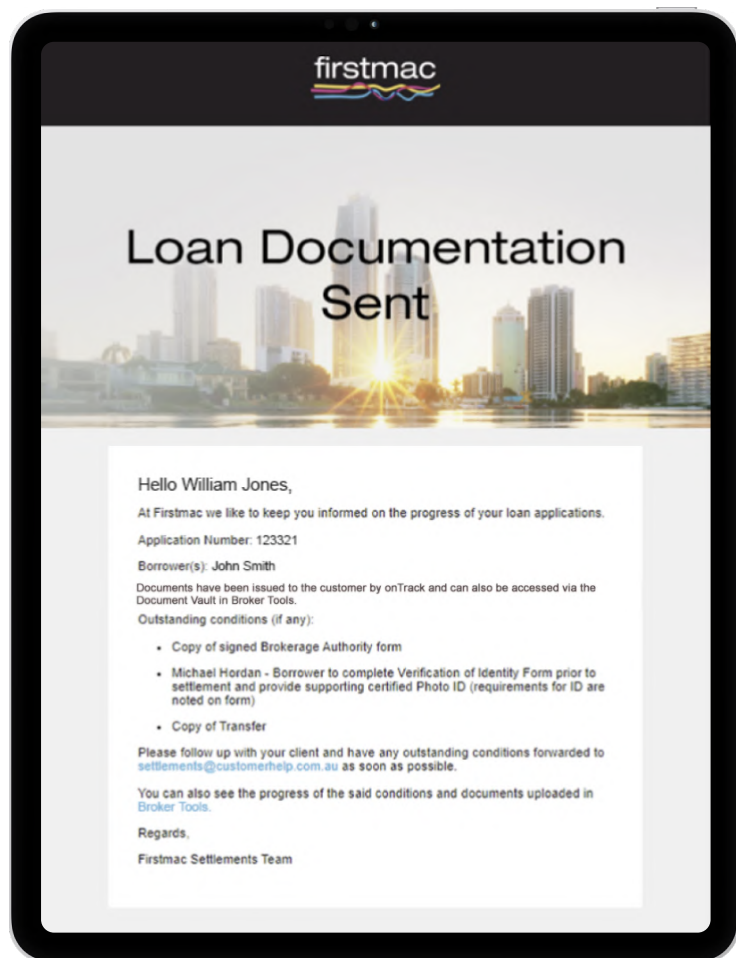
Step 1

Firstmac will advise you by email once the Loan Documents have been sent. **The Home Loan Contract for Signing** is sent to your customer at the same time.

Step 2

To view a copy of the loan documents, simply log into **Broker Tools** and select **My Apps**. Search for the specific application indicated on the email and click on the **blue arrow**.
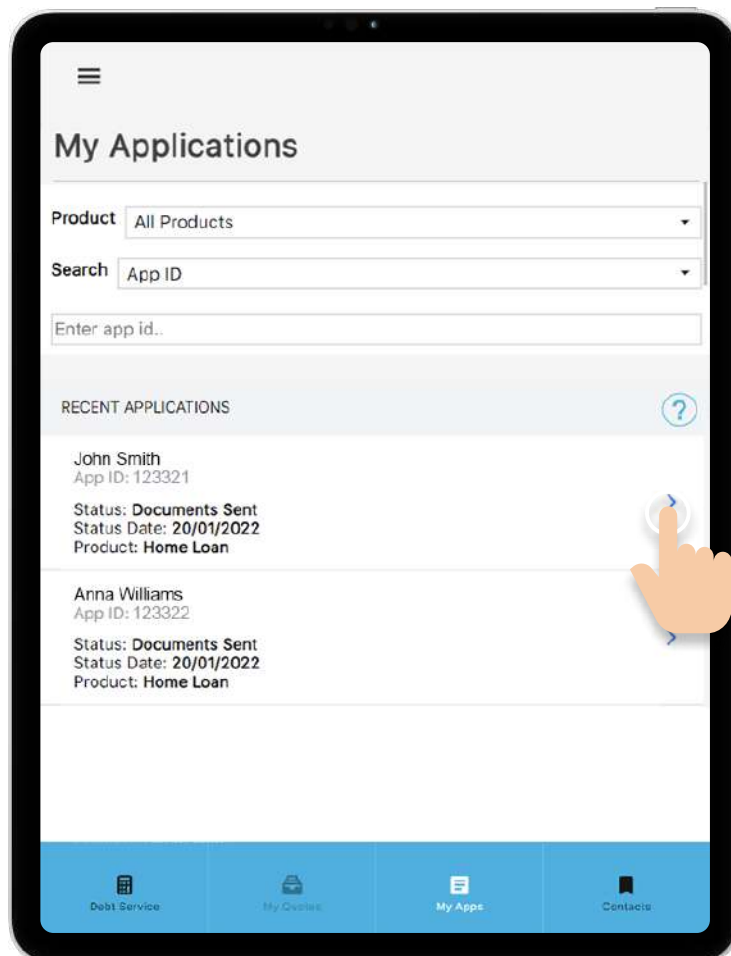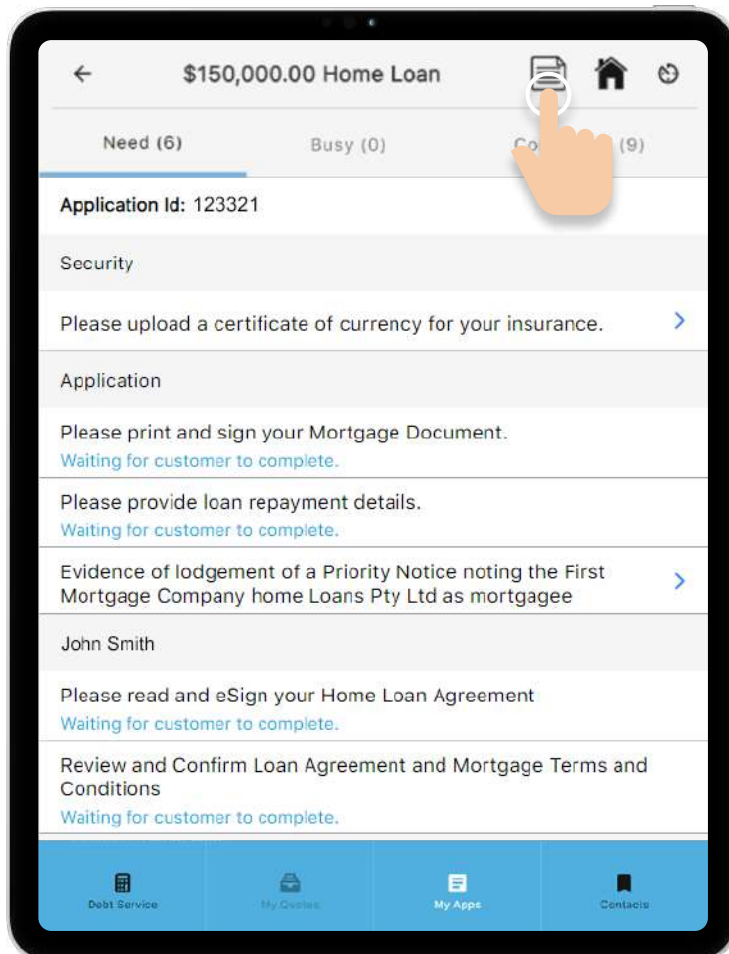
Step 3

You will see the document pack conditions as **Waiting for customer to complete**. This indicates that the documents can be accessed by the customer in onTrack.

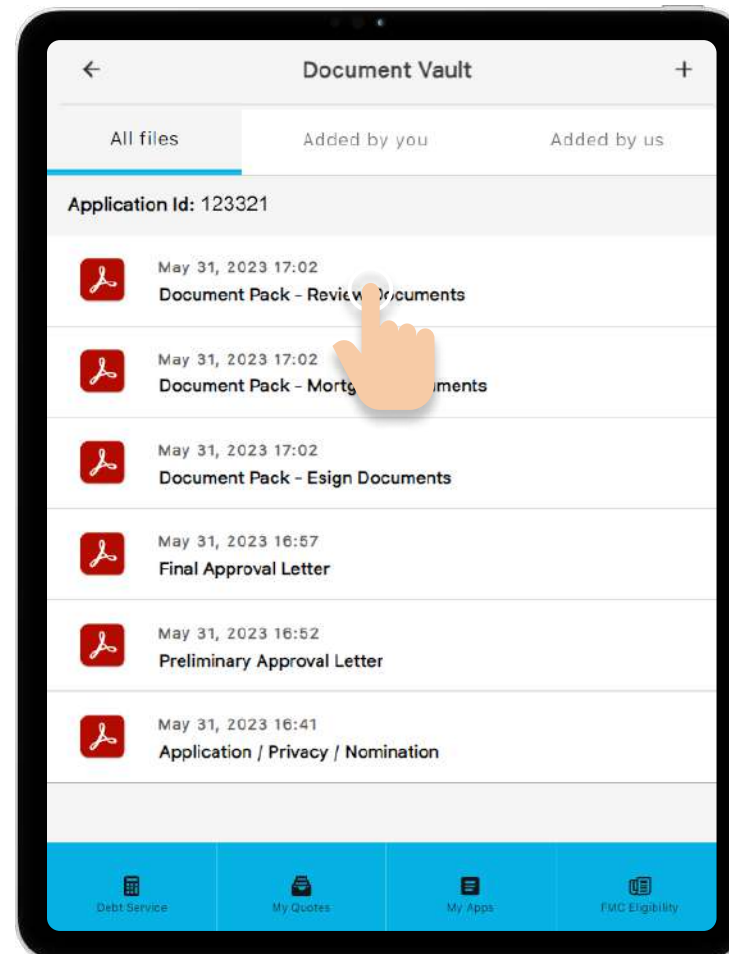The condition will automatically update once the customer has returned the document pack.
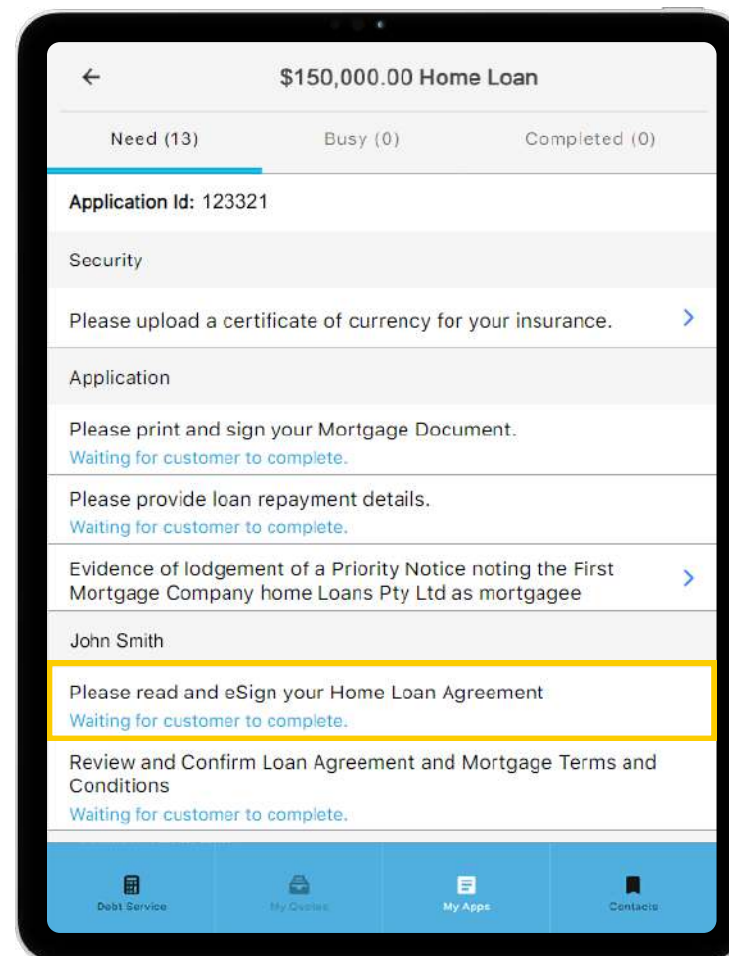
Step 4

To view the original loan documents sent to customers, click on the **Document Vault** icon.
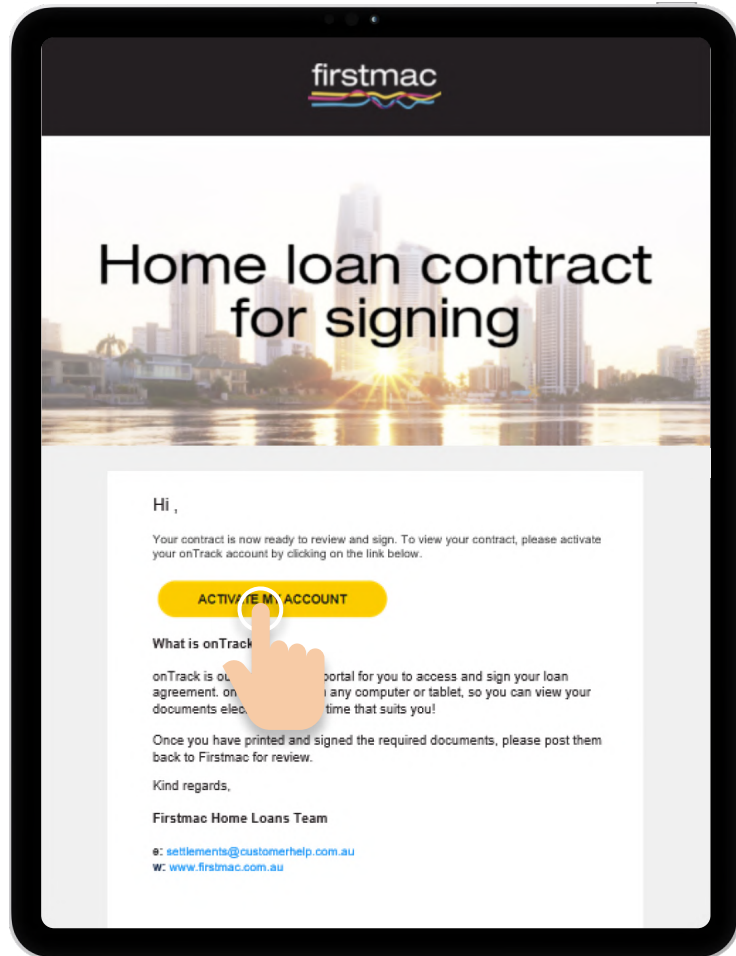

Step 5

All uploaded files by Firstmac for an application are displayed on this page. Click on the displayed document pack file to view and download the loan document.
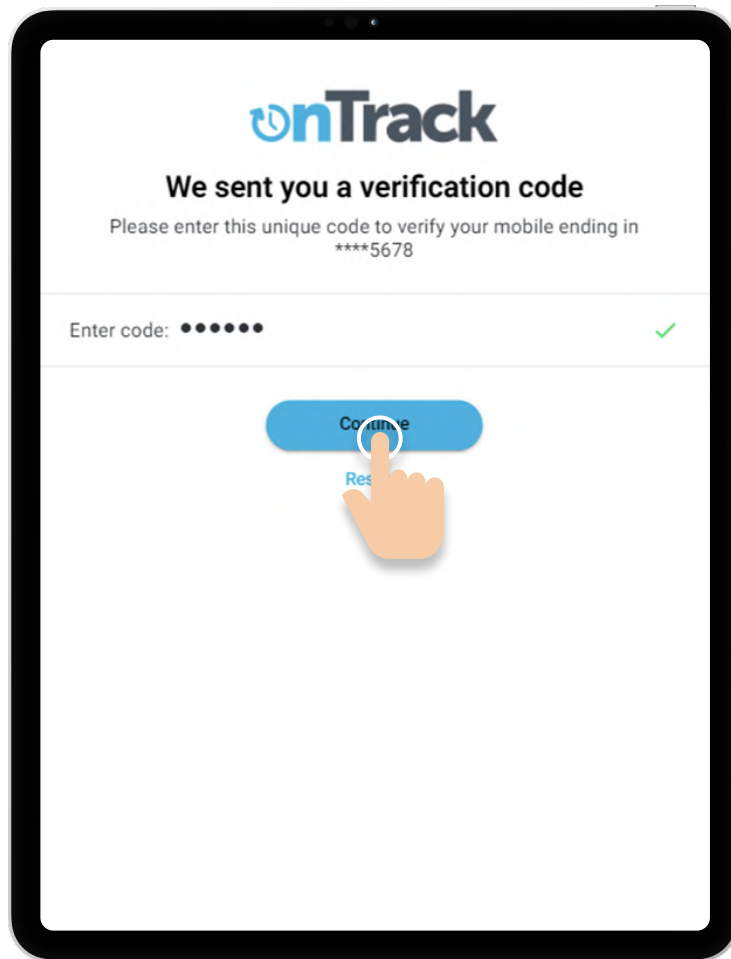
Customer onTrack Account Set Up

Step 1

Your customer will receive the following email from Firstmac. They simply need to click the button **Activate My Account**.
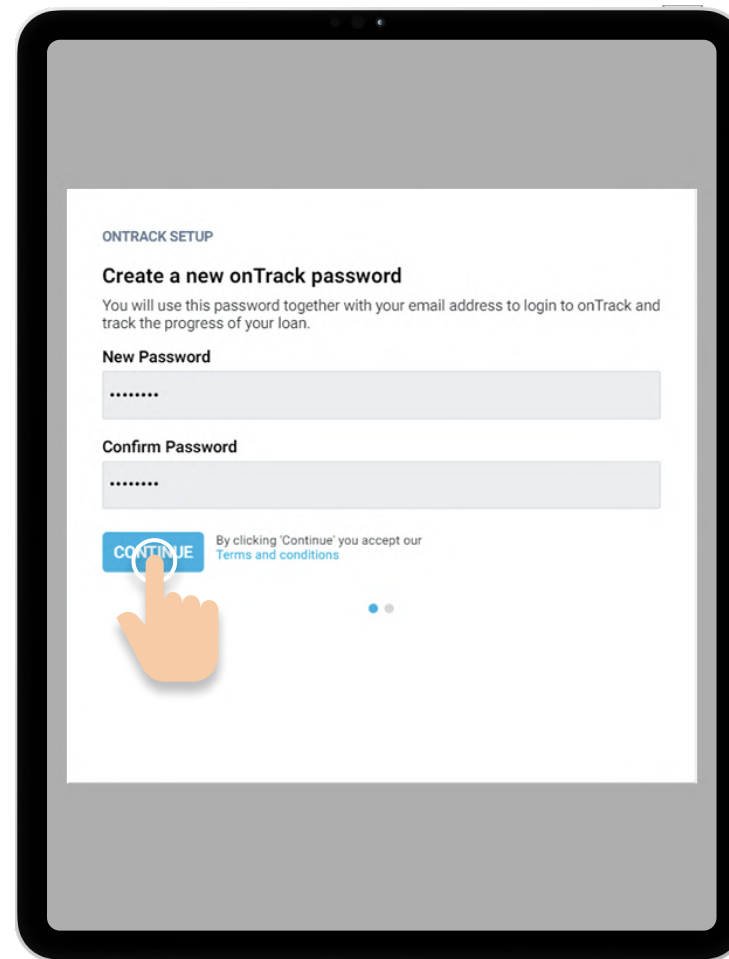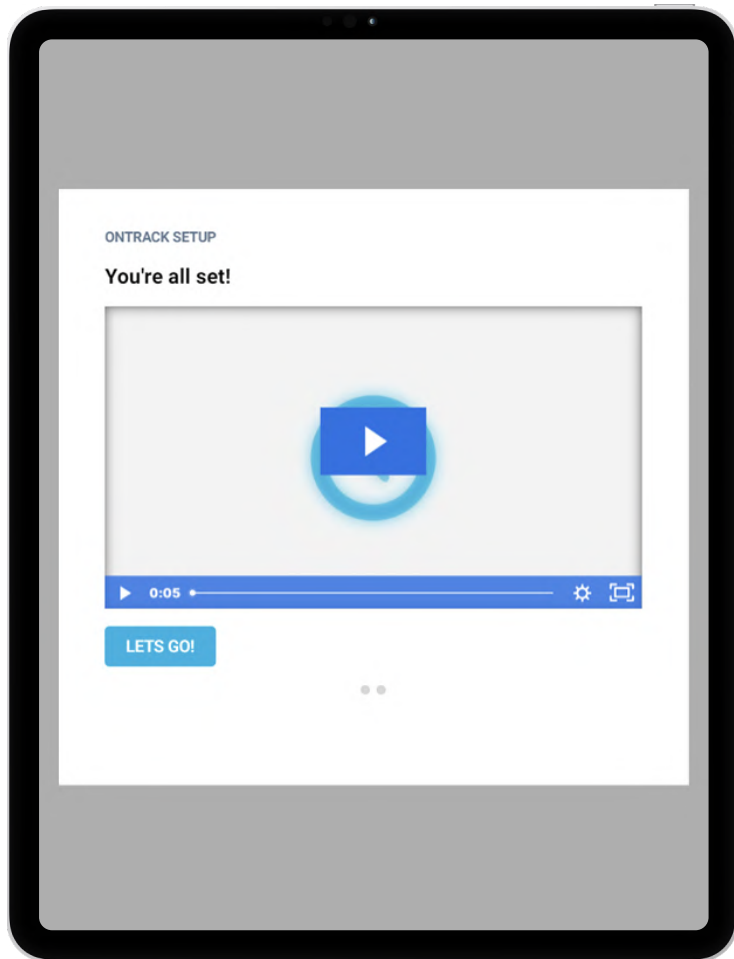
Step 2

Your customer will receive a verification code to their mobile phone. Enter the code on the website and click **Continue**.

Step 3

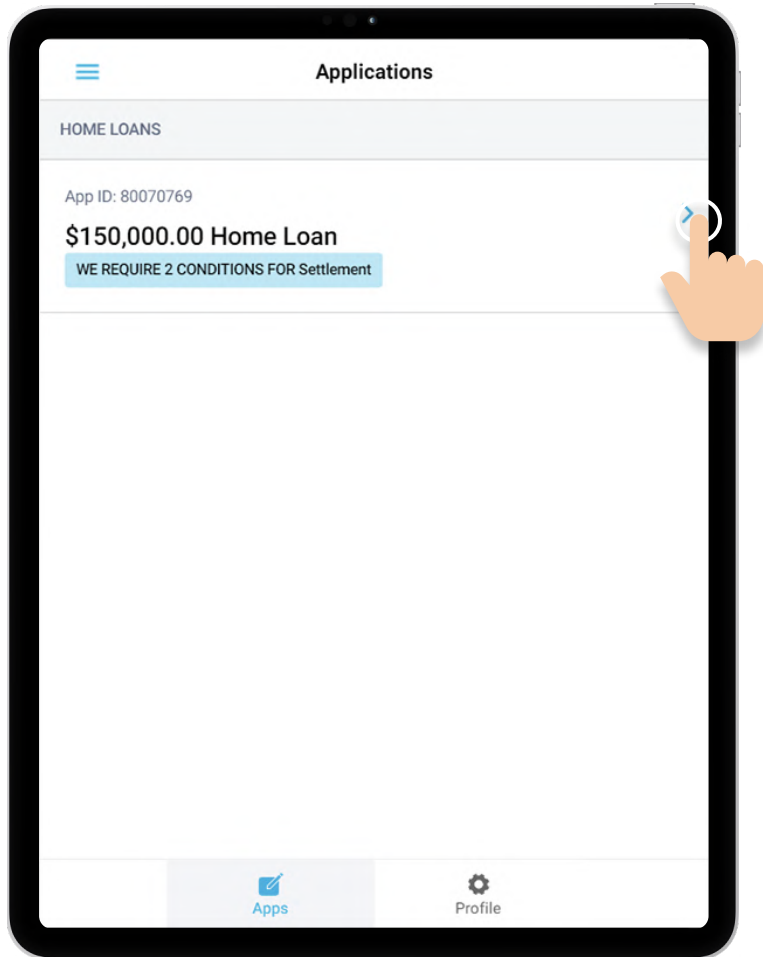After entering the valid code, your customer will be required to set up a **New Password** and click **Continue**.
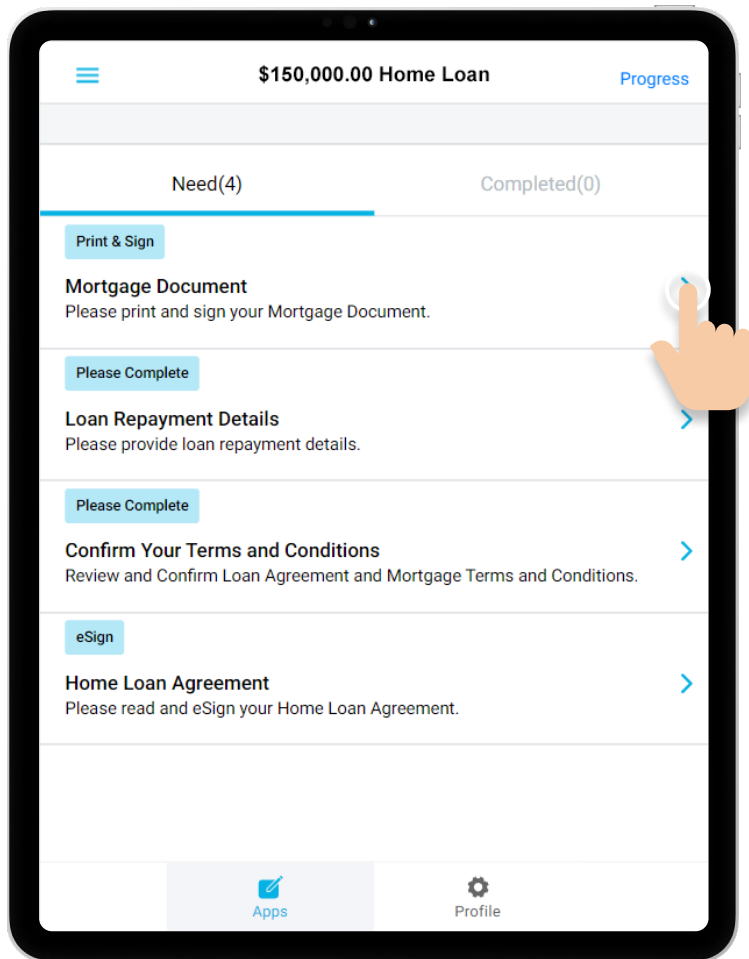
Step 4

Once completed their Account is Active.

Completing Documents in onTrack

Step 1

Once logged into **Firstmac onTrack**, the approved home loan application will be displayed. Simply click the **blue arrow**.

Step 2

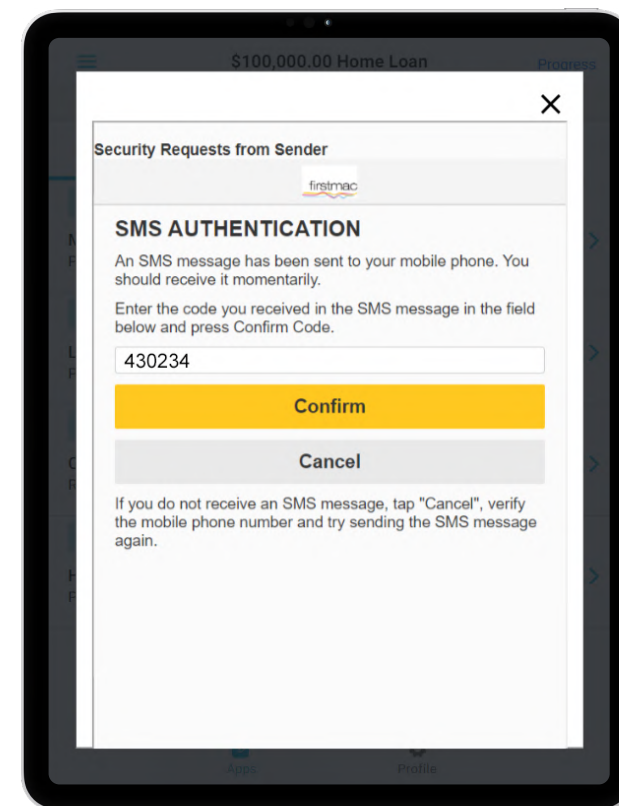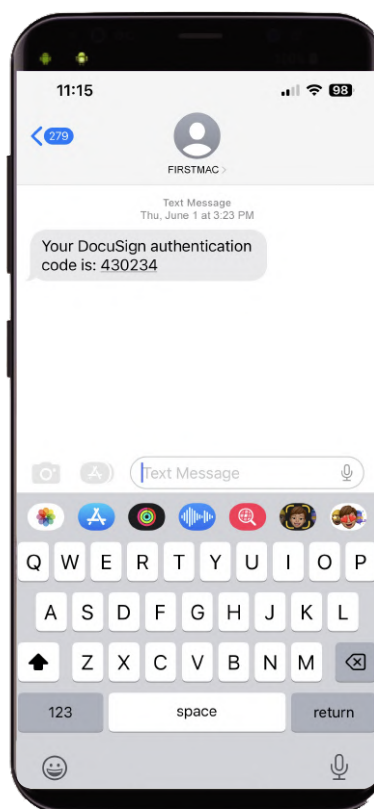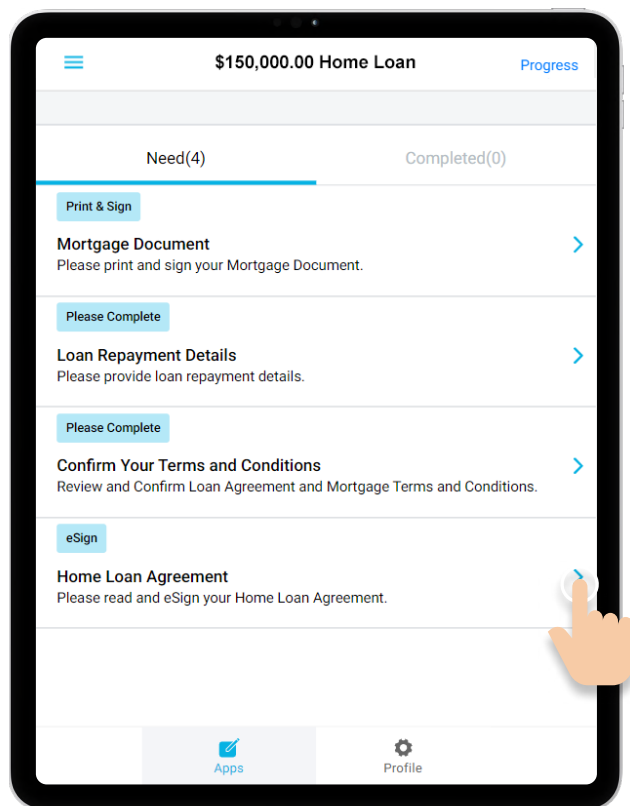Conditions required to complete the loan documents will be displayed.

Simply click the **blue arrow** to action each condition.

Note: Each customer will need to action the conditions using their own Docusign login.

DocuSign

Step 1

When **Please read and esign your Home Loan Agreement** is clicked you will receive an SMS to access Docusign.

Step 2

Documents in the Home Loan Agreement can be electronically signed using Docusign. This includes the Mortgage for all states excluding ACT, NT, TAS & WA.

The Mortgage for these states will be listed as a separate condition to be printed and signed. Original printed Mortgages can be posted to **GPO BOX 7001 Brisbane QLD 4001**
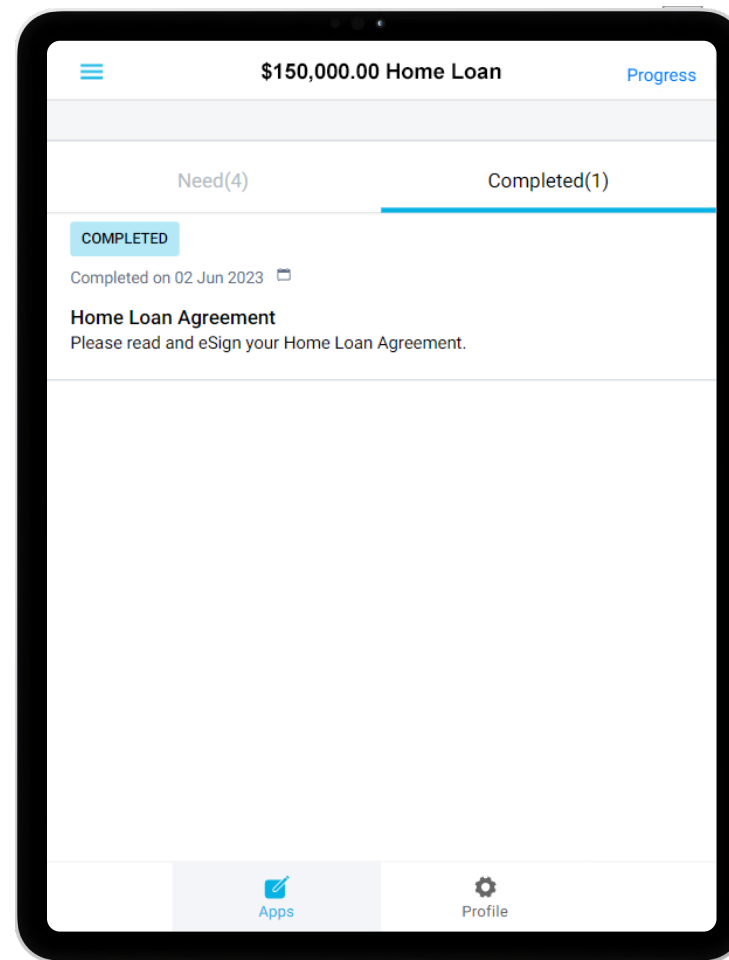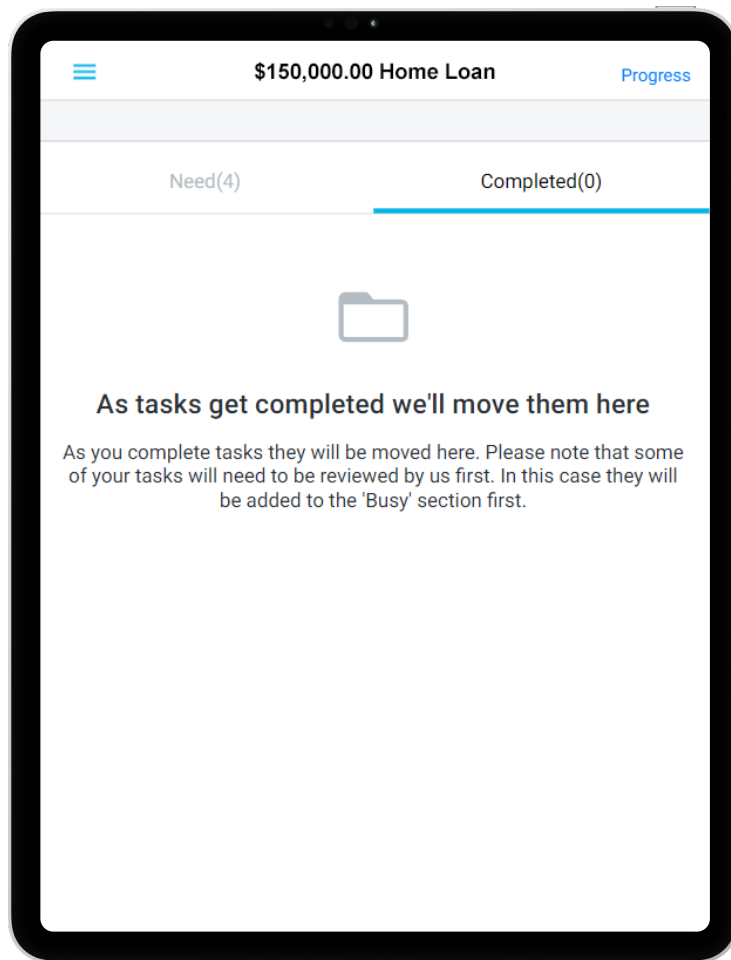
Note: The Verification of Identity form must also be printed and signed but originals are not required for settlement.
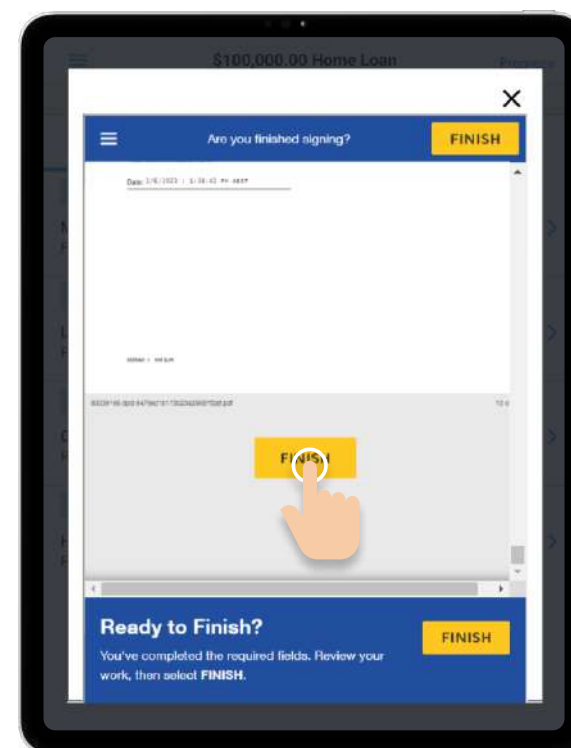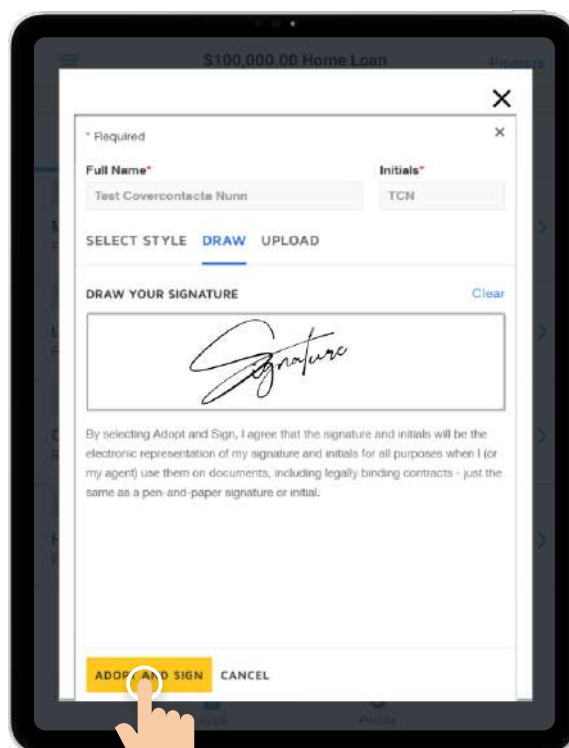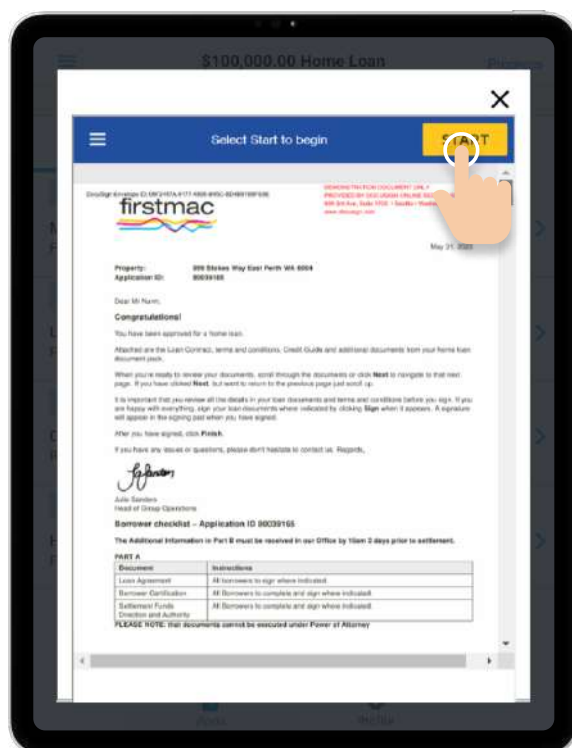
Step 3

Once actioned, the conditions will move from the **Need** tab to the **Completed** tab.

For joint applicants, the condition will not move to **Completed** until both borrowers have completed the Docusign process.

Accessing onTrack

Customers can log in to onTrack at any time after setting up their initial password by visiting the Firstmac website.

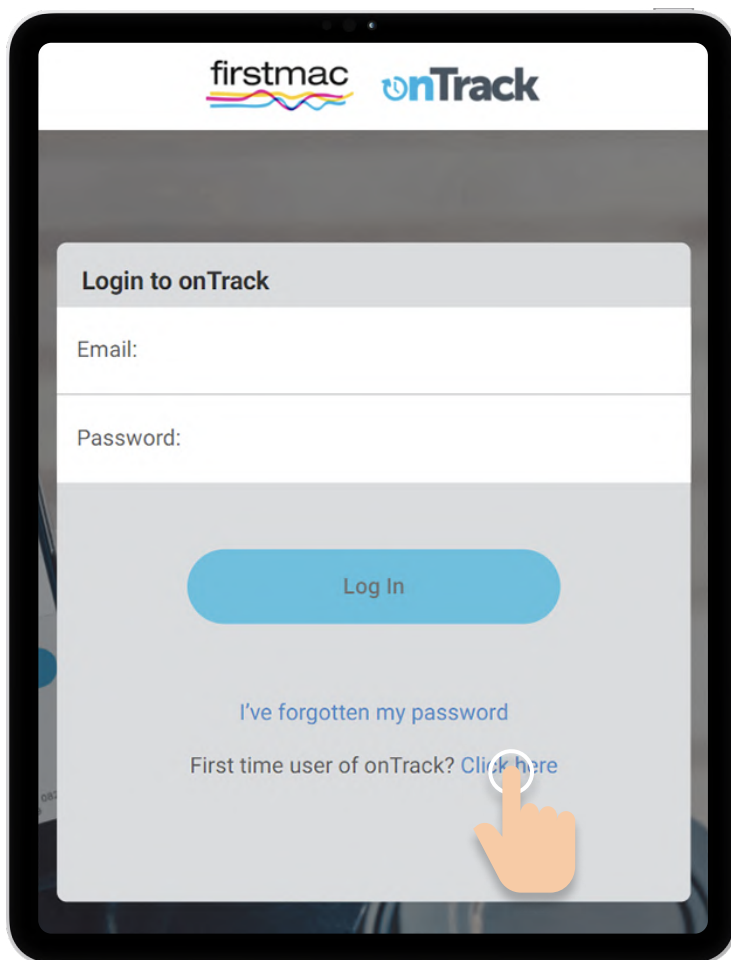If your customer did not receive the **onTrack Home Loan Contract For Signing** email they can simply go to the Firstmac website.
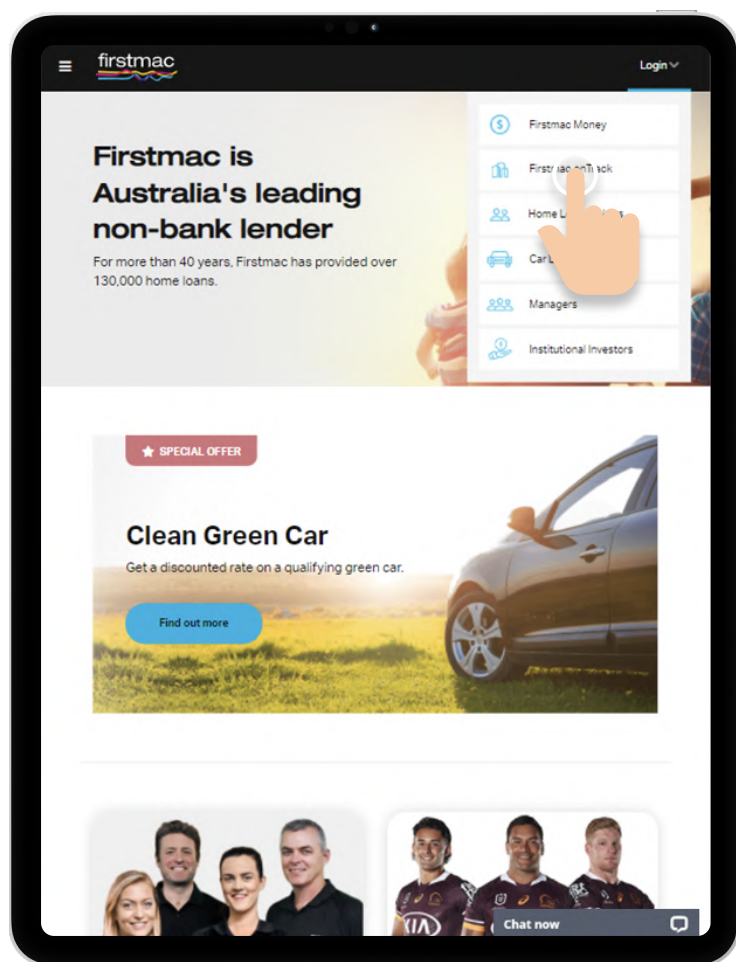
Step 1

Click **Login**, select **Firstmac onTrack**.

Step 2

Select **First time user of onTrack? Click here**.
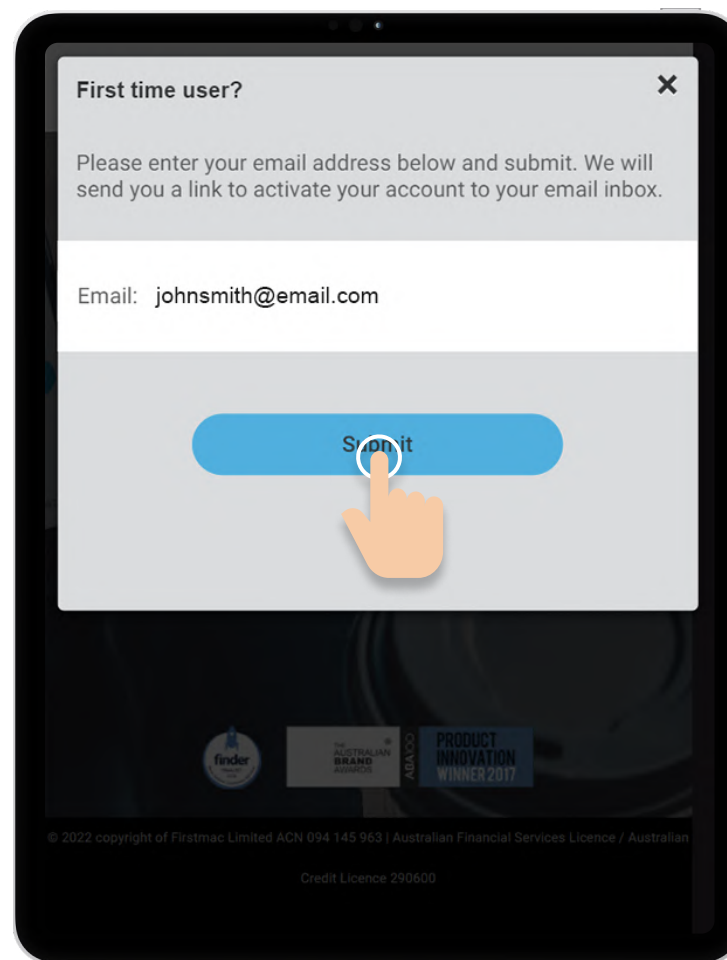
Step 3

Enter customer email address - same email address provided in the loan application and click **Submit**.
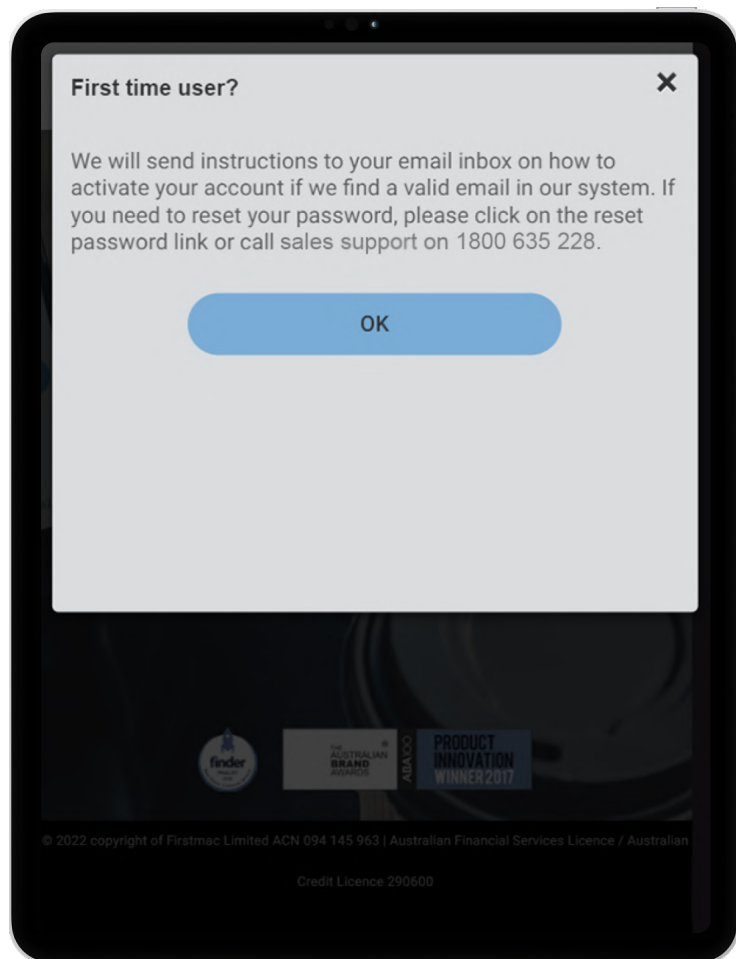
Step 4

Your customer will then start from Step 1 in the Customer Account Set Up.
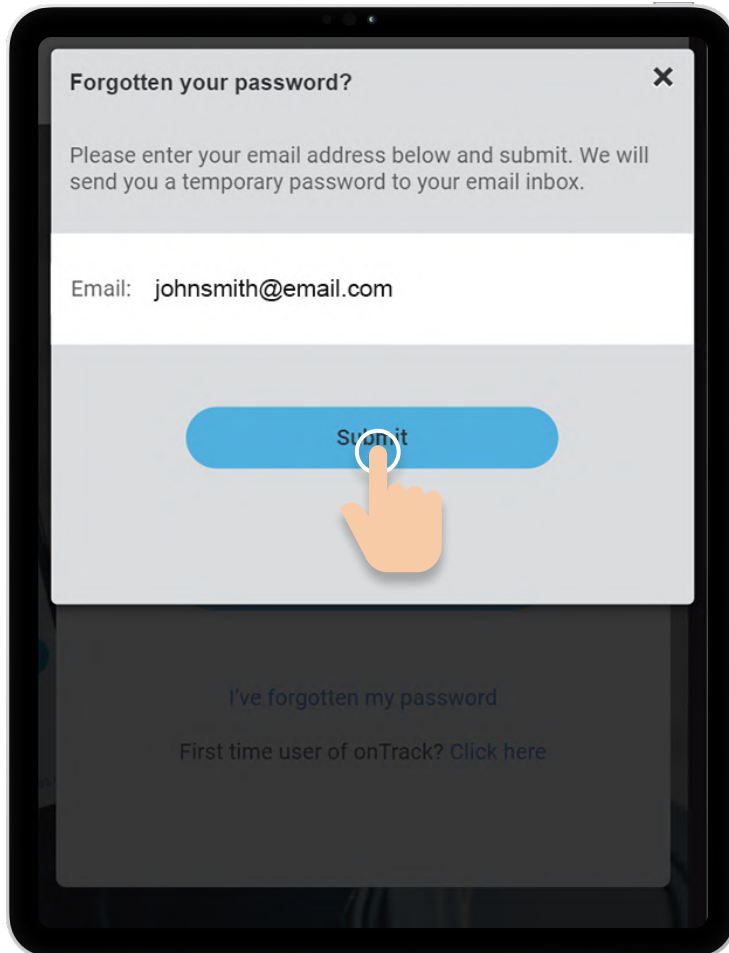
onTrack Password Reset
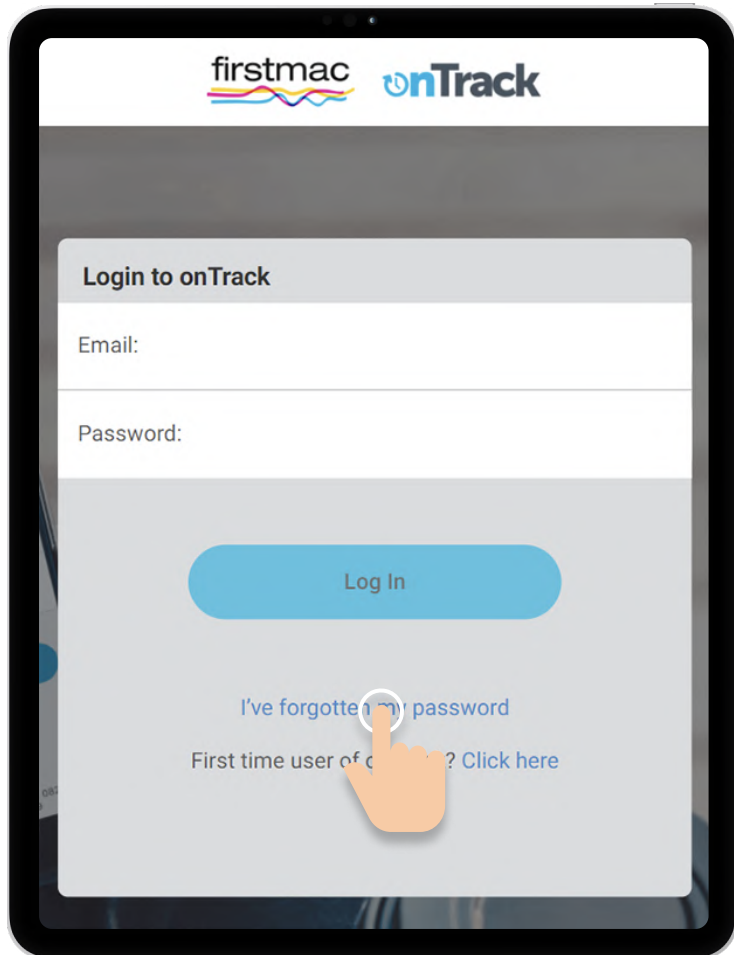
Step 1

If customer exited the password setup page, user must click on **I've forgotten my password** to setup a new password (account is already activated at this point).

Step 2

Enter email address – same email address receiving the Home Loan Contract For Signing notification and click **Submit**.

Forgotten your password?

Please enter your email address below and submit. We will send you a temporary password to your email inbox.
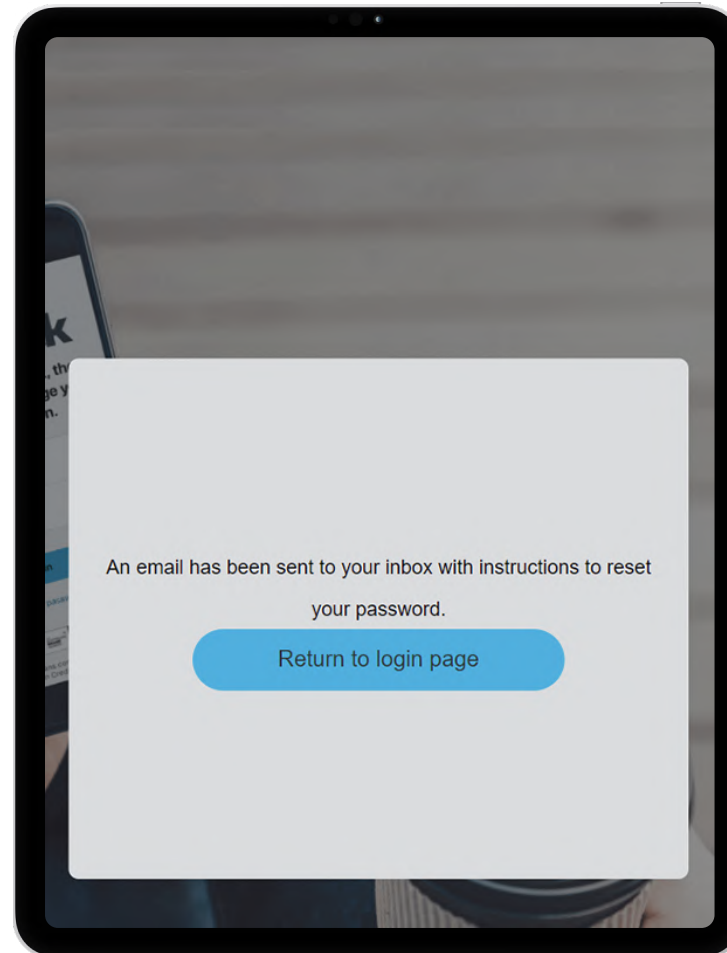
Email: johnsmith@email.com

Submit

I've forgotten my password

First time user of onTrack? Click here

Step 3

System will send password reset instructions if entered email is valid.

An email has been sent to your inbox with instructions to reset your password.
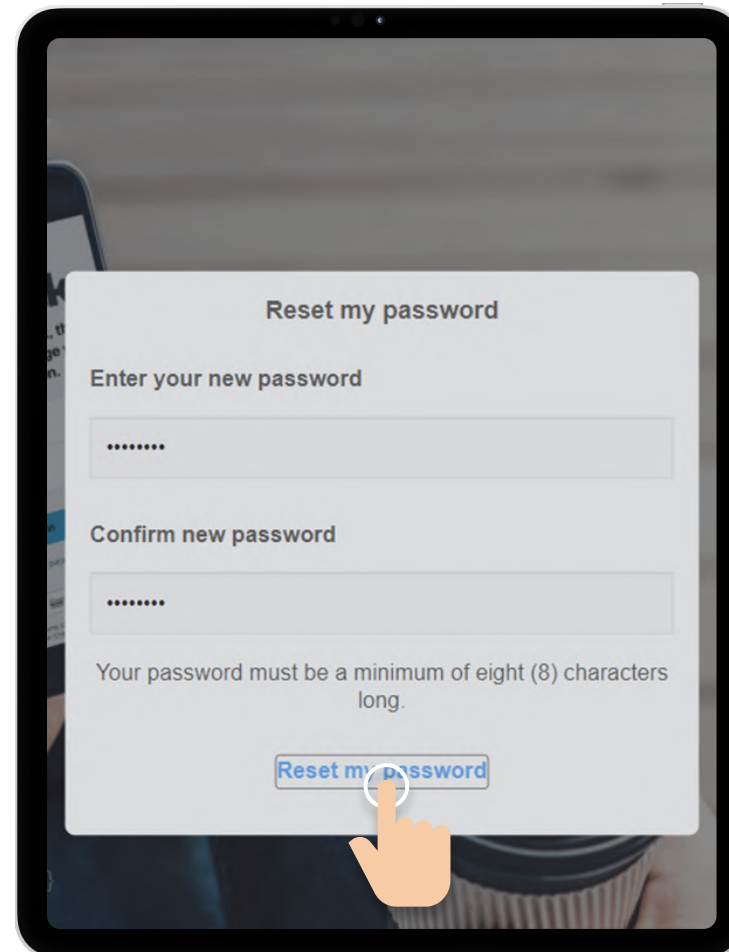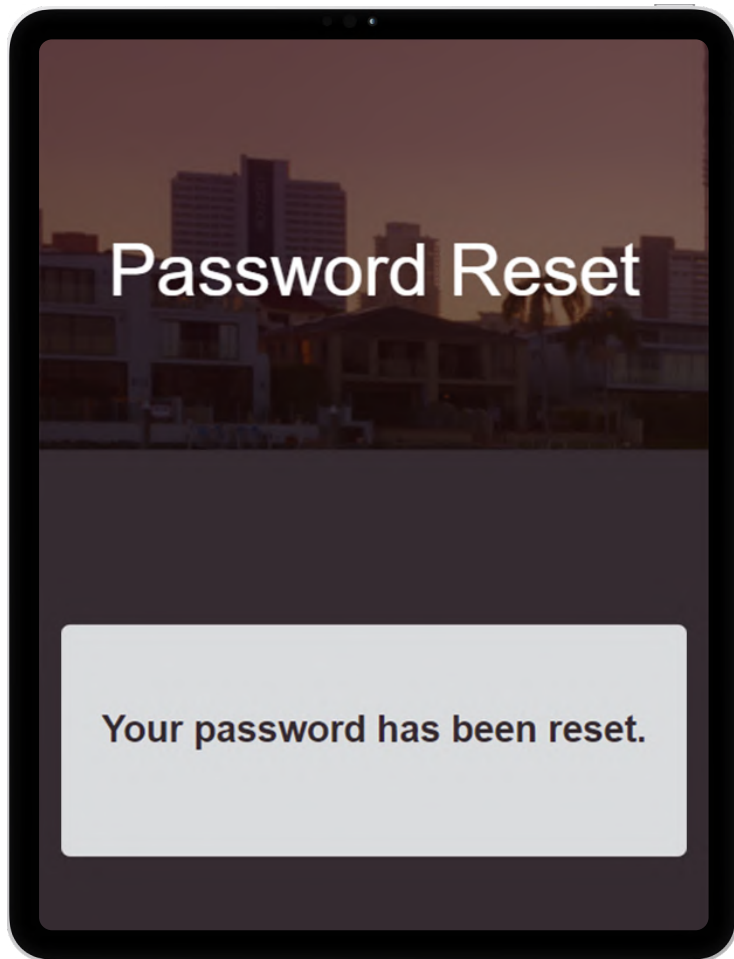
Return to login page

Step 4

Customer will receive a **Reset my onTrack password** email. Click on **Reset My Password** button to open the new password setup page. The link can only be accessed once and will expire afterwards.
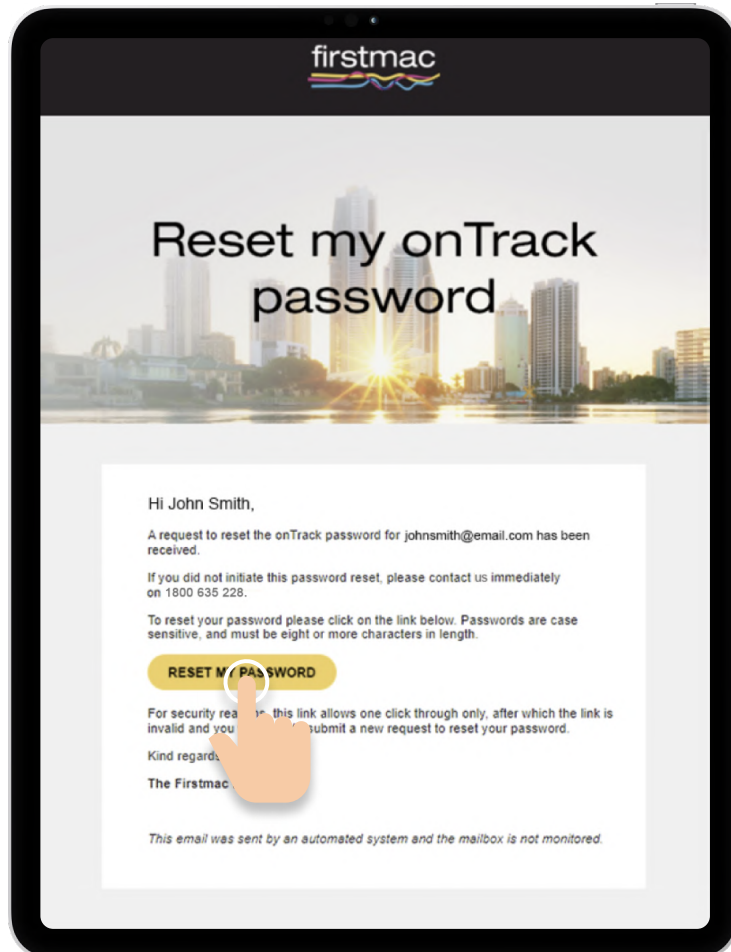
Step 5

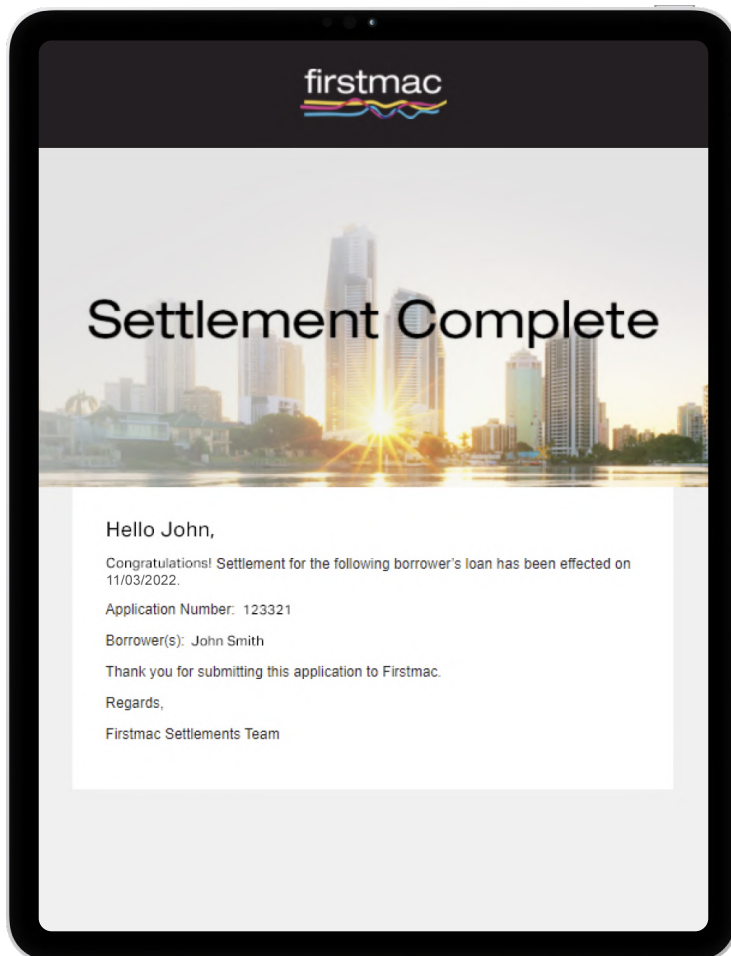Setup new password for the account and click **Reset my password**.

Step 6

A success page will be displayed after completing password setup. Return to **Firstmac onTrack Login page** and enter new account details to access the application.
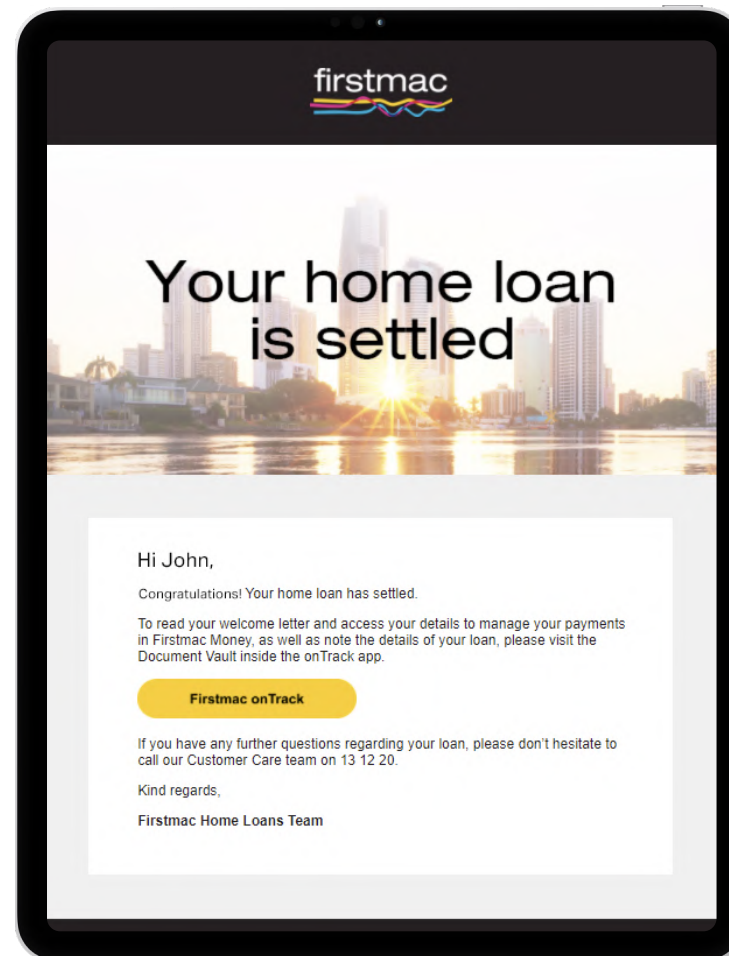
Viewing Welcome Letter

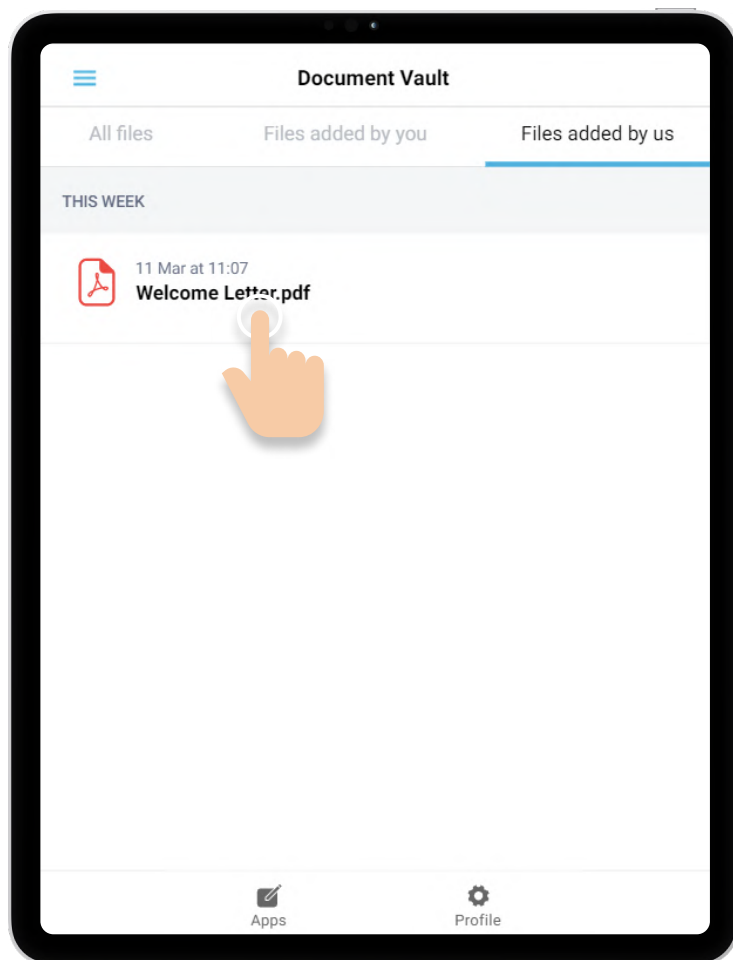Once application has settled, you will receive a **Settlement Confirmation** email notification.

A **Welcome Letter** email will be sent to your customer the following morning.

Step 3
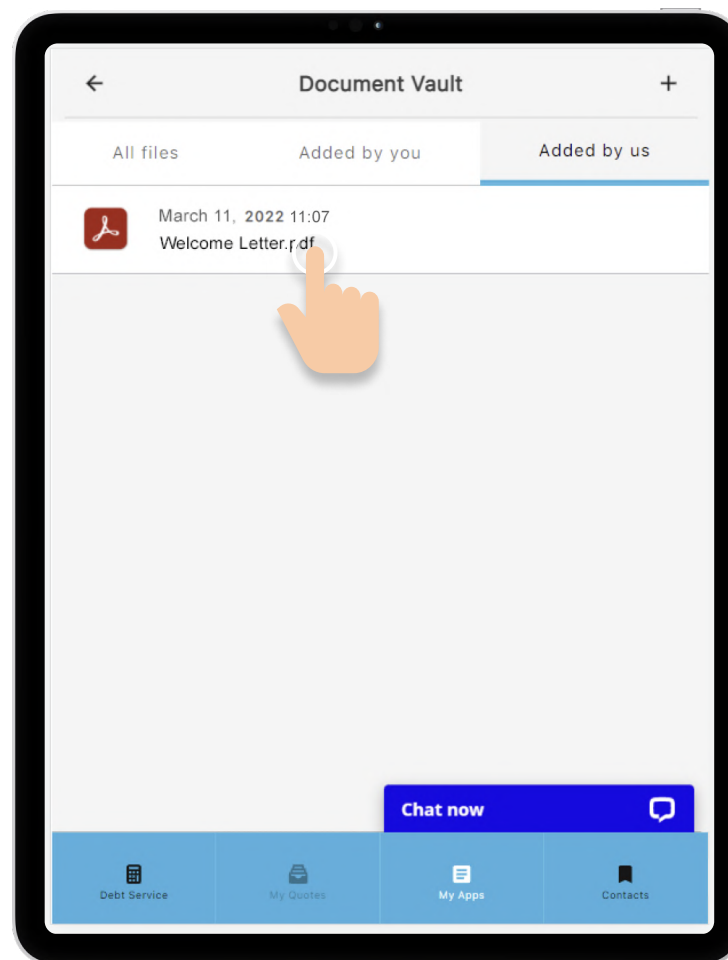
Your customer can view the welcome letter in **Document Vault** in onTrack.

A copy is also saved to **Broker Tools Document Vault** for your reference.

onTrack

Broker Tools

Step 4

Click the **download icon** to save a copy.

Firstmac Money account activation
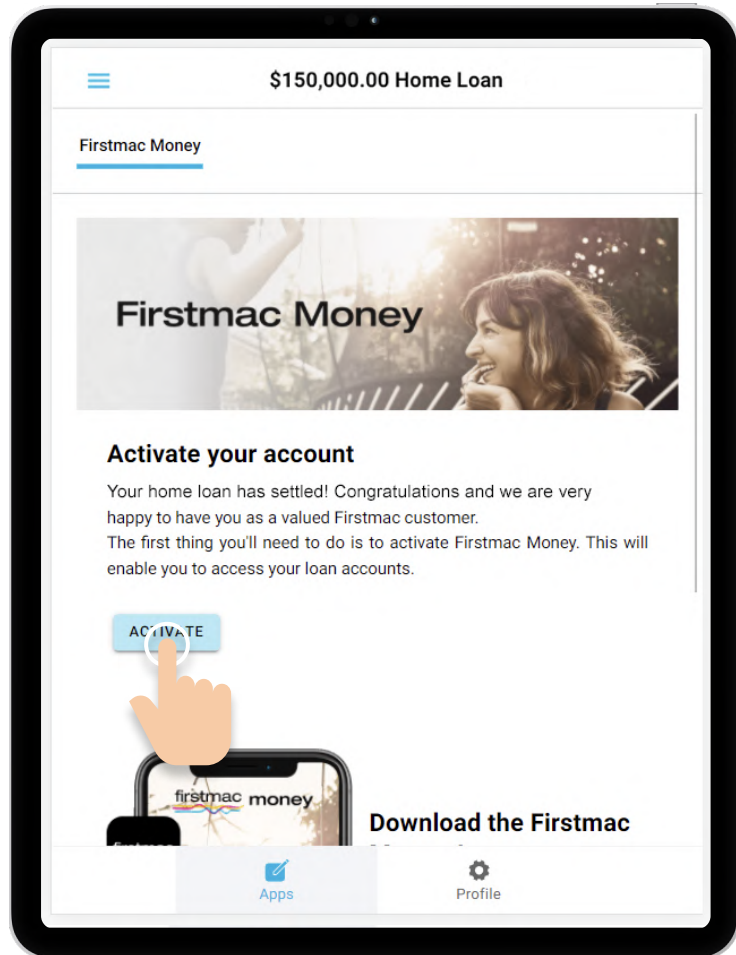
Step 1

Upon selecting an application in onTrack, a page for Firstmac Money activation will load. Your customer will have to click **Activate** to initiate the process.

Step 2

Your customer will receive a verification code to their mobile phone. Enter the code on the website and click **Continue**.

Step 3

Upon successful verification, the system will provide your customer with their **Customer Number** and send a **temporary access code** to their mobile phone. By clicking Login, your customer will be directed to Firstmac Money.

Step 4

Your customer will be asked to provide **Security Questions**, accept **Terms and Conditions** and setup a **new access code**.

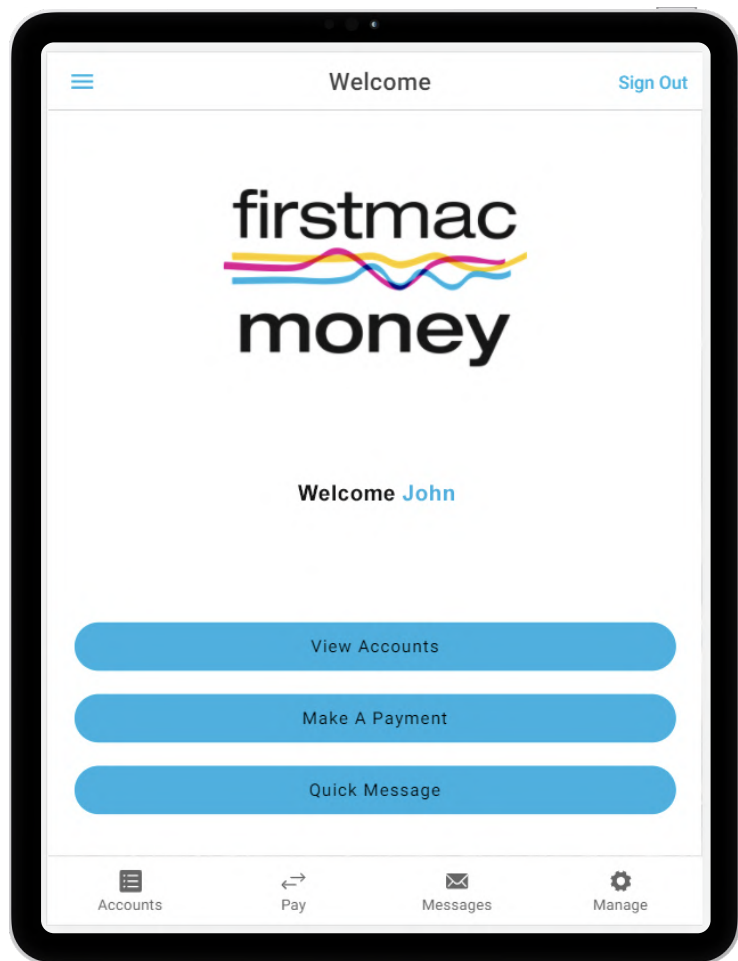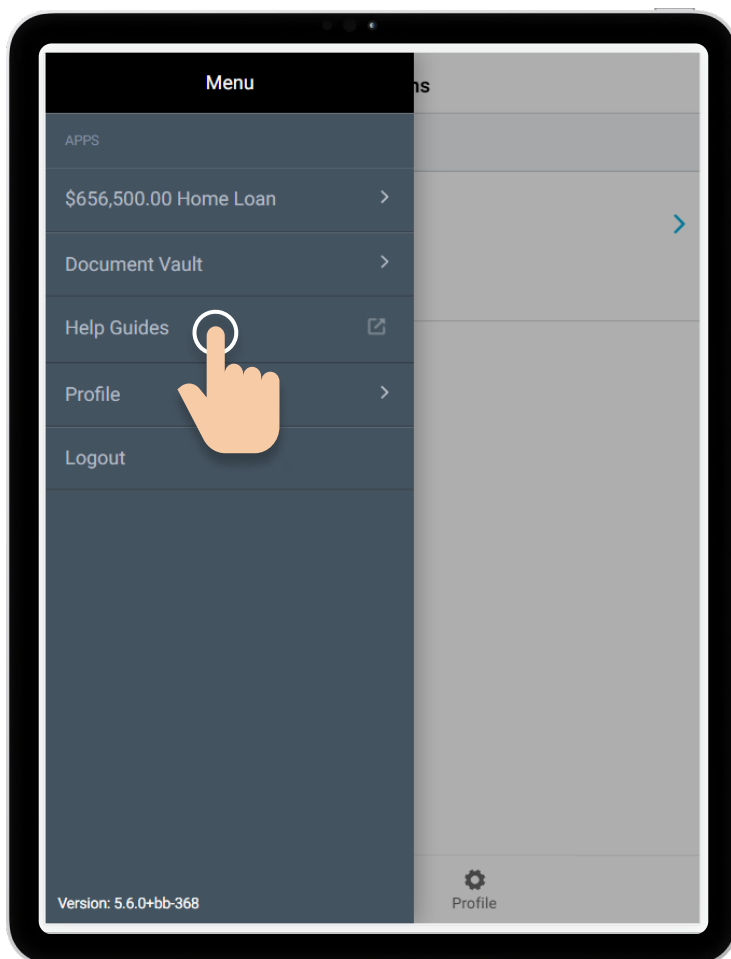Click **Save** to proceed.

Step 5

Once completed, their Firstmac Money account is **Active**.

Access Helper Guides from Firstmac onTrack

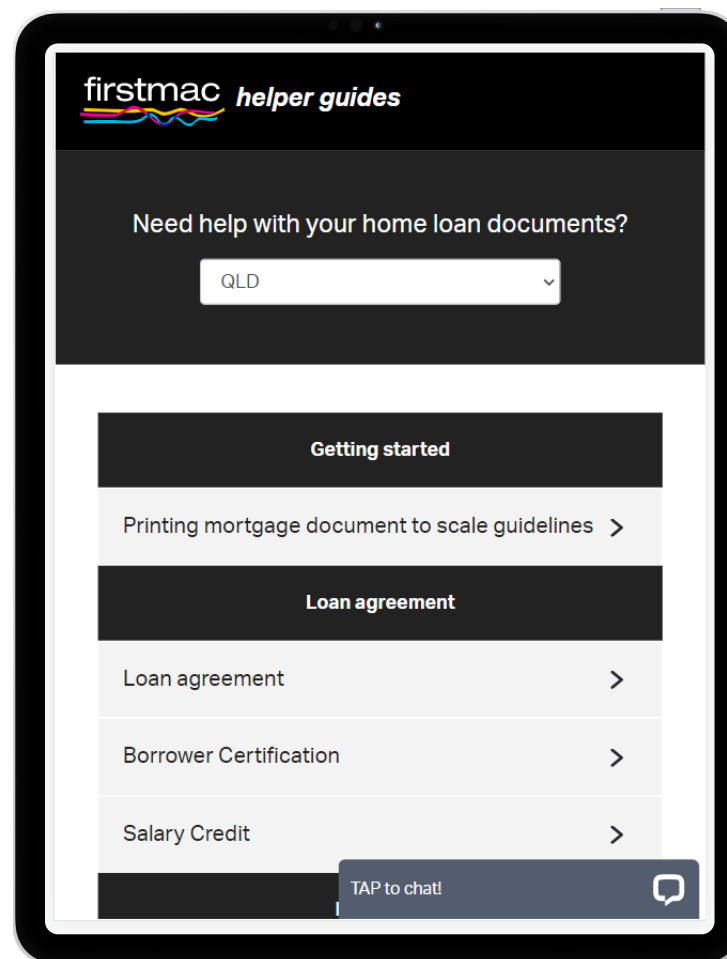## Step 1

Login to FMC onTrack and select **Help Guides** from menu.

Menu

APPS

$656,500.00 Home Loan

Document Vault

Help Guides

Profile

Logout

Version: 5.6.0+bb-368

Profile

Step 2

This will open a **new page in browser** and direct you to **Firstmac Helper Guides** site.

firstmac *helper guides*

Need help with your home loan documents?

QLD

Getting started

Printing mortgage document to scale guidelines >

Loan agreement

Loan agreement >

Borrower Certification >

Salary Credit >

TAP to chat!

If you have any further questions please call our **Home Loan Sales Support** on **1800 635 228**.

firstmac