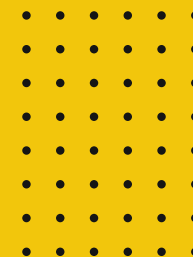
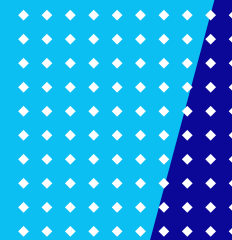




Broker Tools **My Apps & DocuSign Guide**

SECURED ASSET



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My Applications

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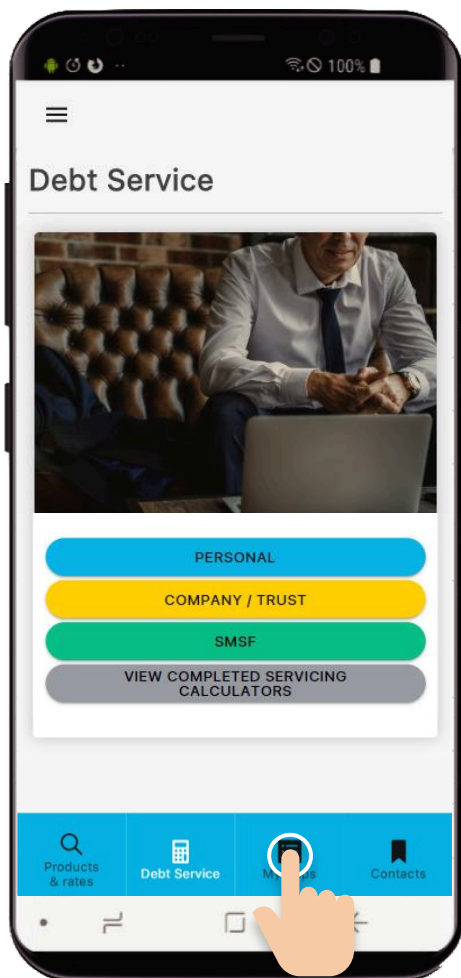
A person wearing a blue denim shirt is seated at a wooden desk. They are holding a smartphone in their right hand and have their left hand resting on a stack of notebooks. A black smartwatch is visible on their left wrist. In the foreground, the keyboard of a laptop is partially visible. The background is softly blurred, showing warm, bokeh-style lights from an indoor setting.

My Applications

Step 1

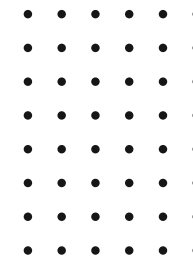
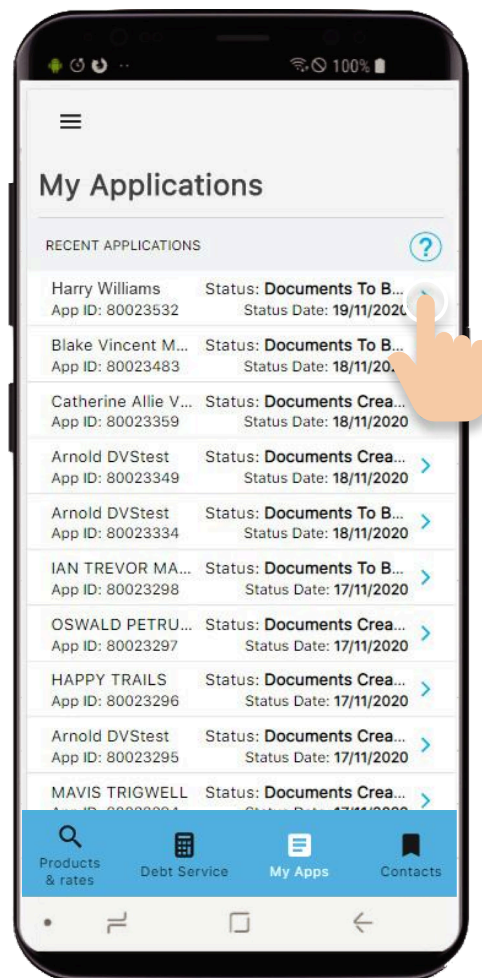
Accessing My Apps

Click on **My Apps** to see a list of all your recent applications.



Step 2

View at a glance the status of your current applications. To further review the status, select the **arrow to the right** of the application you wish to review.



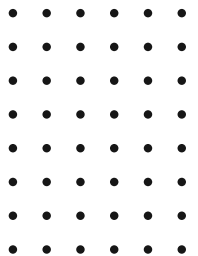
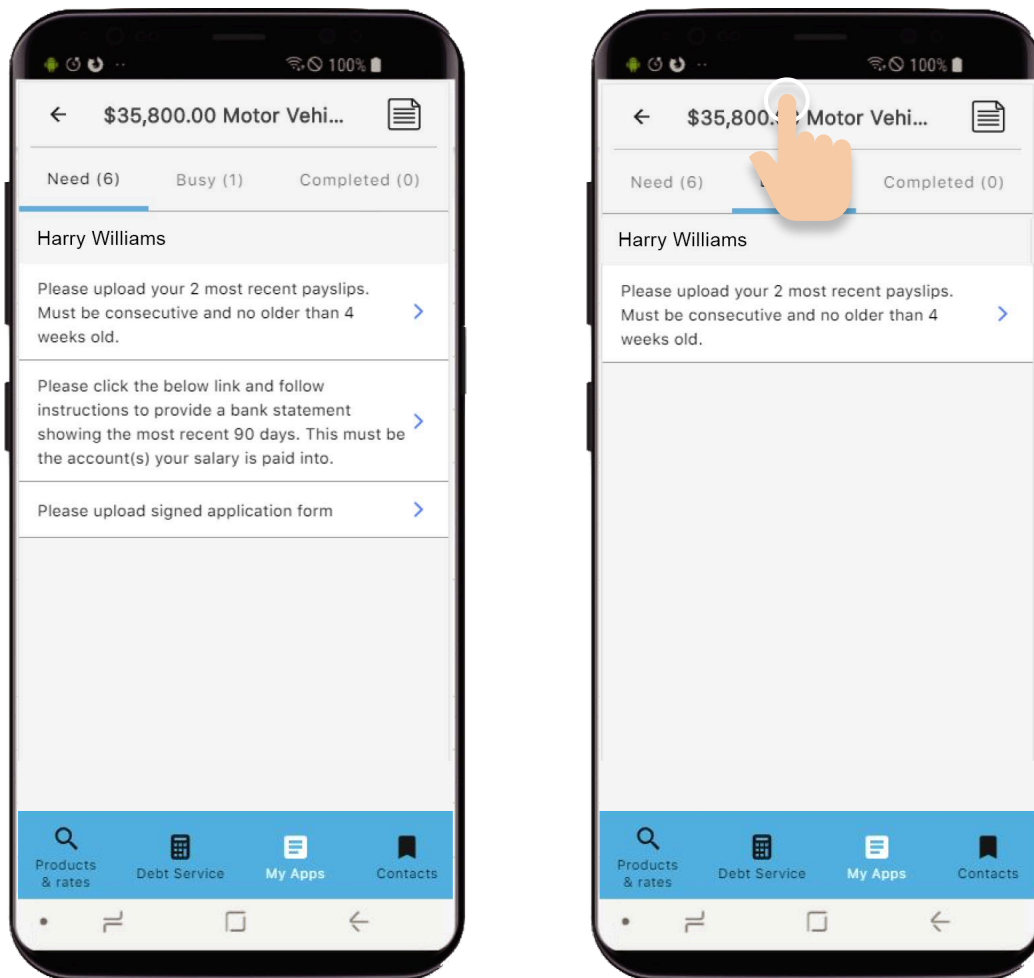
Step 3

Viewing Conditions

This will open the application, starting with the **Need** tab, where you will see the steps, called **conditions** that you need to complete in order to apply.

This section will be updated every time the application progresses and will show any new conditions.

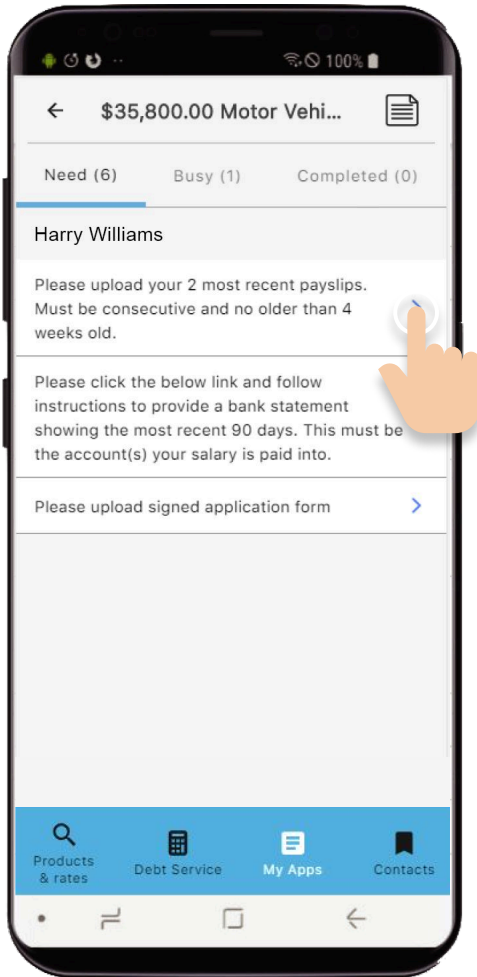
As you complete each step, it will move from Need, to **Busy** (which means we are processing it), and finally to the **Completed** section. You can check each section by clicking on the tab.



Step 4

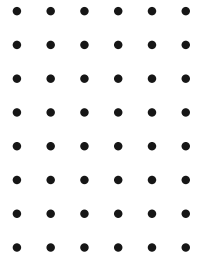
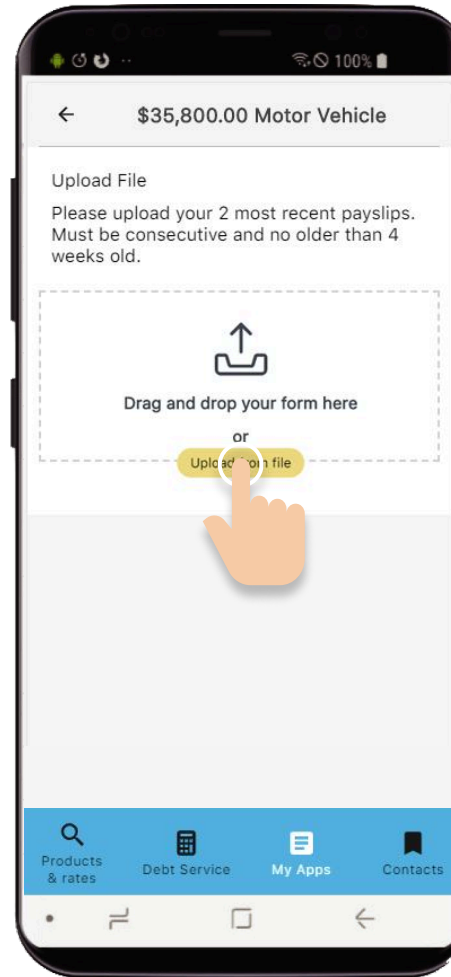
Actioning Conditions

To complete an outstanding condition under the Need tab, select the **arrow to the right** of the condition.



Step 5

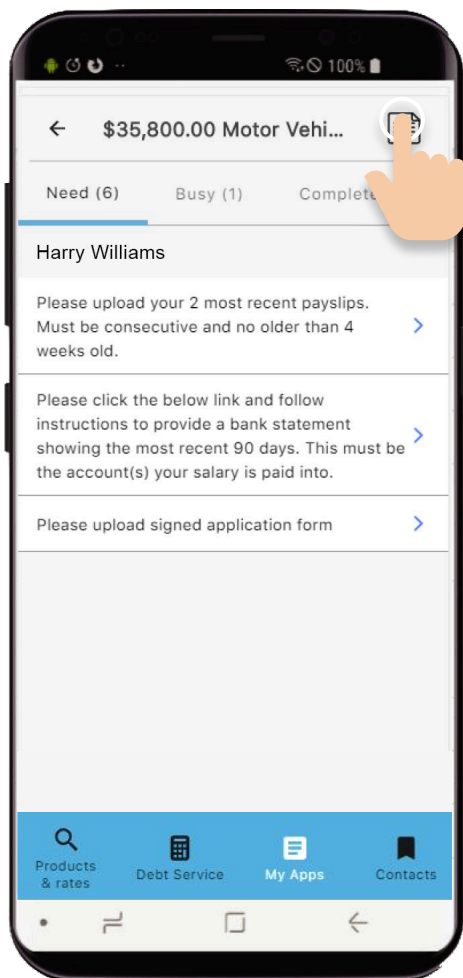
You will see the details of the required form. You can upload by dragging and dropping, or by selecting **Upload from file**, and selecting the file from your device.



Step 6

Accessing Document Vault

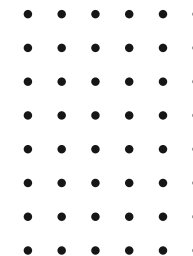
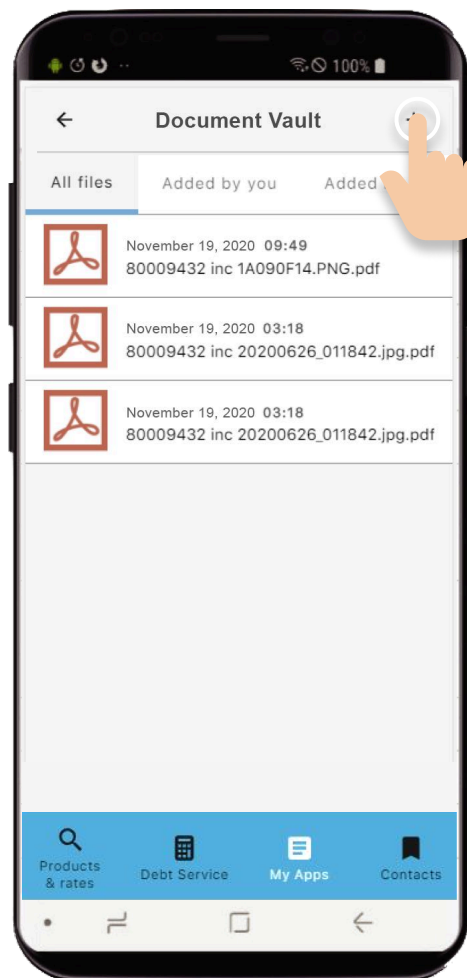
At any time, you can view all the documents that you or Firstmac have uploaded just by selecting the Document Vault icon. The Document Vault is the single location where all of your documents are securely held.



Step 7

You can even upload new files directly to the Document Vault if necessary, just by selecting the + symbol, which will open the file directory on your device.

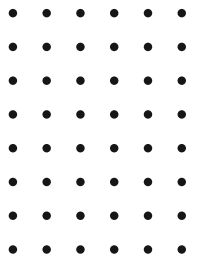
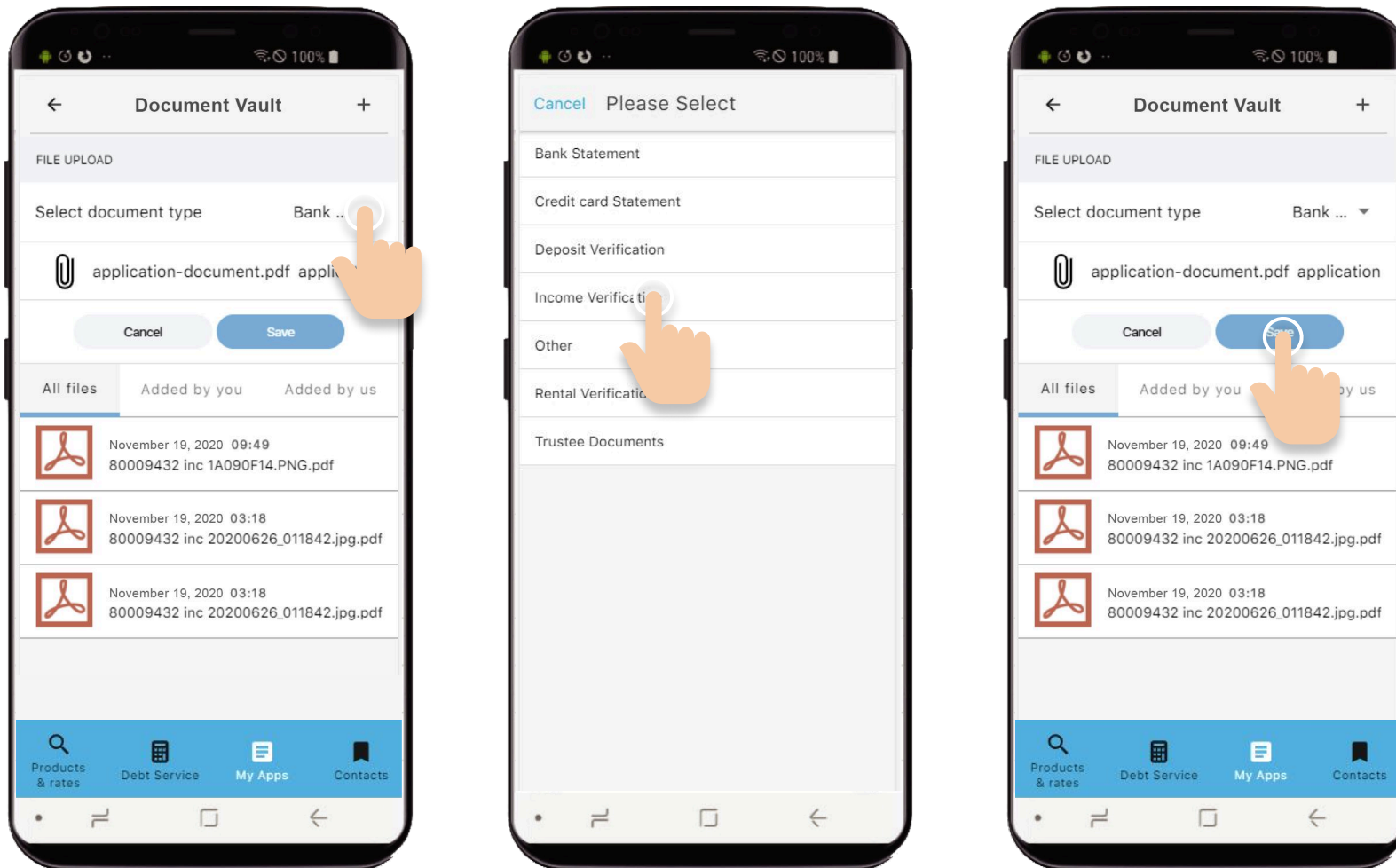
Please note, the maximum file size is 1MB for document uploads.



Step 8

Using Document Vault

Now select the **Document Type** from the drop down menu and select **Save**.

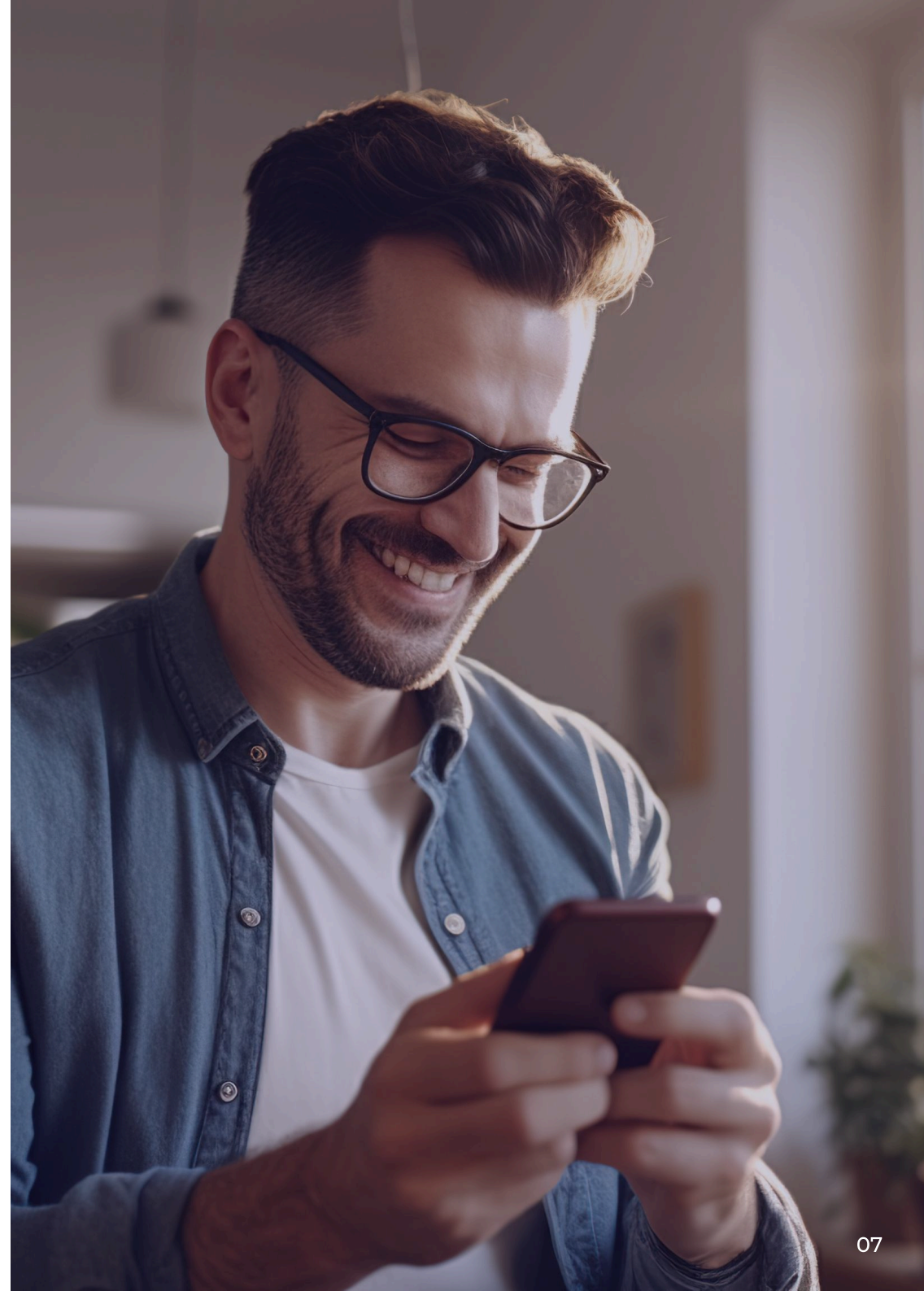


Accessing onTrack

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

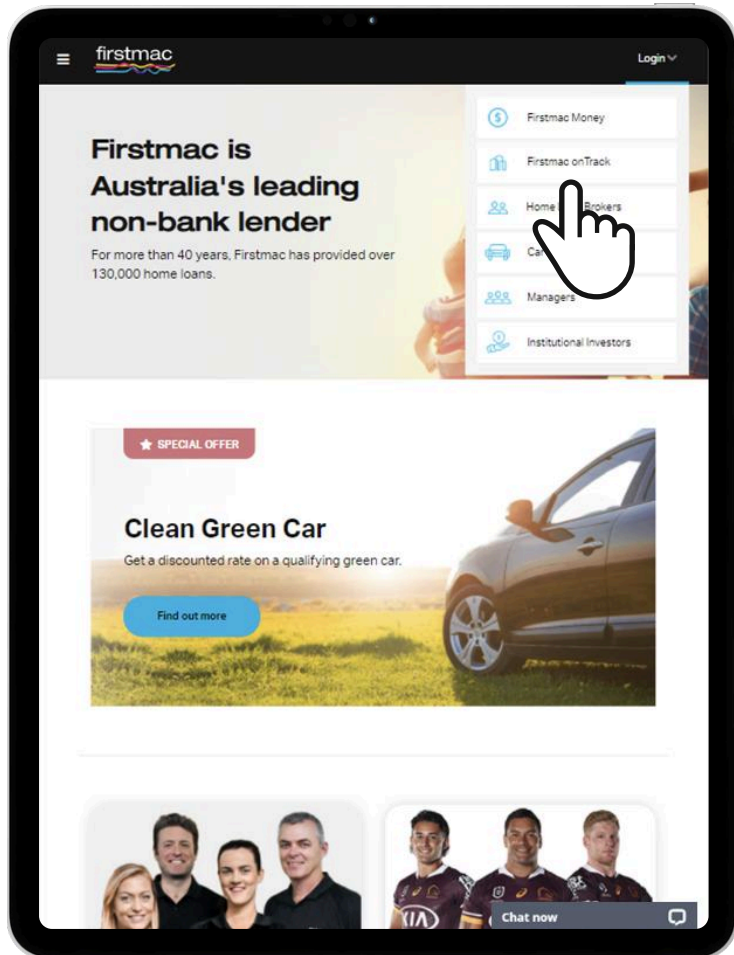
To access onTrack they can simply go to the Firstmac website. An SMS code will be sent to the customer on each log in attempt.

If the customer enters the incorrect code or password 3 times their onTrack account will be locked.



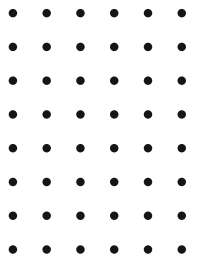
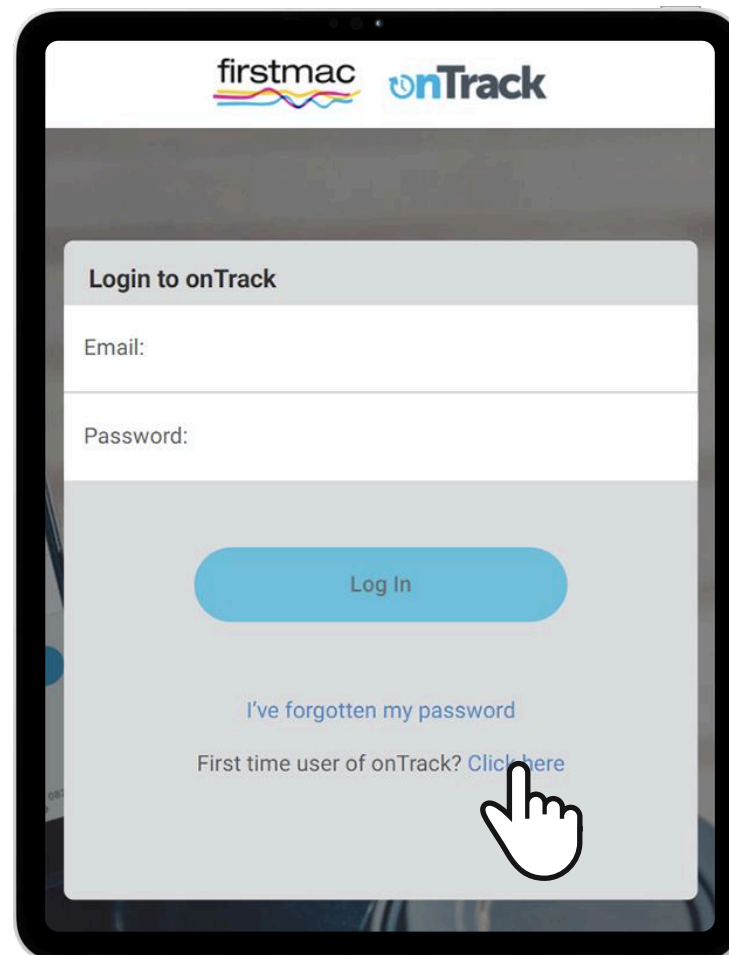
Step 1

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



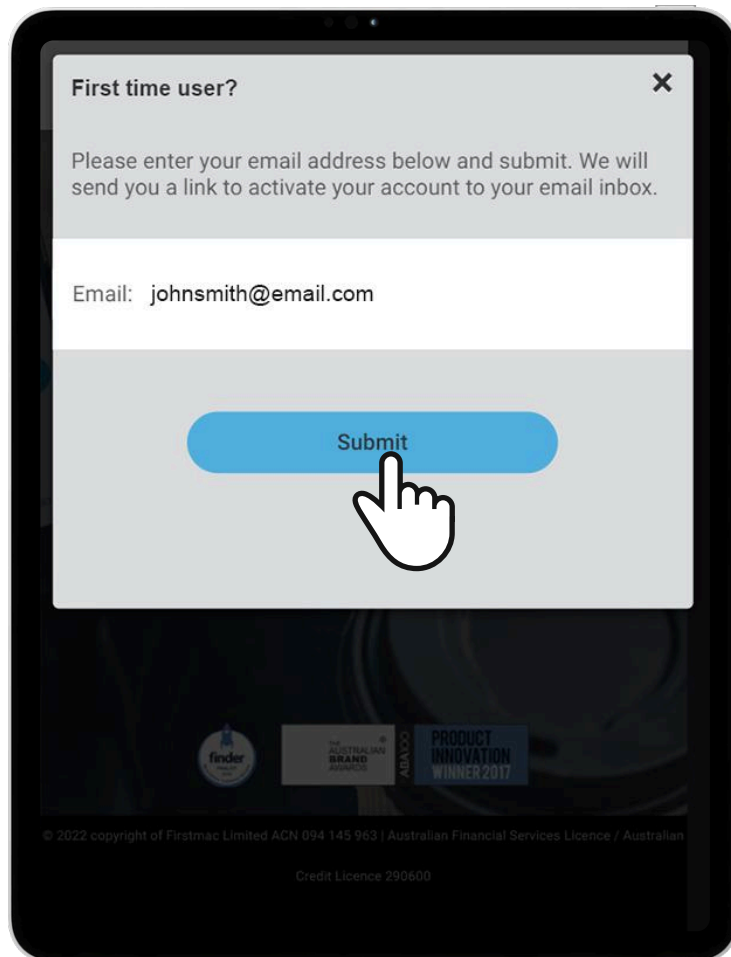
Step 2

Select **First time user of onTrack?** Click [here](#).



Step 3

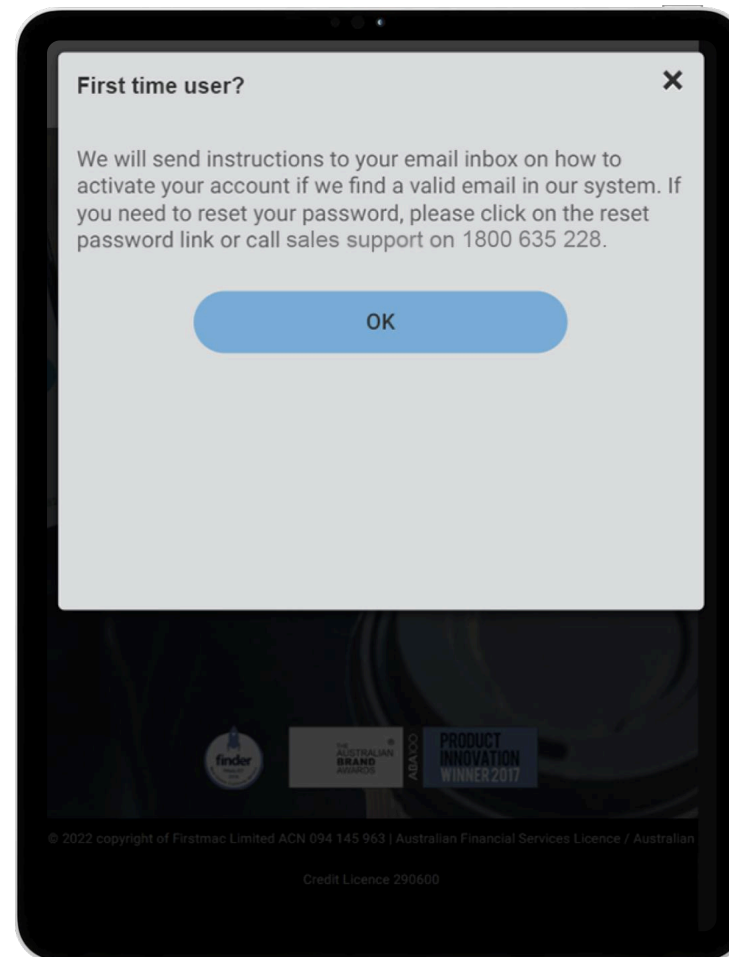
Enter customer email address - same email address provided in the loan application and click **Submit**.



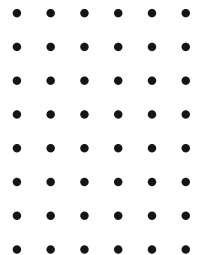
A mobile app interface for a 'First time user?'. The screen has a light gray background with a dark gray header bar containing the title 'First time user?' and a close button (X). Below the header, there is a text prompt: 'Please enter your email address below and submit. We will send you a link to activate your account to your email inbox.' This is followed by a white input field containing the email 'johnsmith@email.com'. Below the input field is a blue rounded rectangular button labeled 'Submit'. A white hand cursor icon is pointing at the 'Submit' button. At the bottom of the screen, there is a dark gray footer area containing several logos: 'finder', 'THE AUSTRALIAN BRAND AWARDS', 'ABA', and 'PRODUCT INNOVATION WINNER 2017'. Below these logos, there is fine print: '© 2022 copyright of Firstmac Limited ACN 094 145 963 | Australian Financial Services Licence / Australian Credit Licence 290600'.

Step 4

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



A mobile app interface for a 'First time user?'. The screen has a light gray background with a dark gray header bar containing the title 'First time user?' and a close button (X). Below the header, there is a text prompt: 'We will send instructions to your email inbox on how to activate your account if we find a valid email in our system. If you need to reset your password, please click on the reset password link or call sales support on 1800 635 228.' Below this text is a blue rounded rectangular button labeled 'OK'. At the bottom of the screen, there is a dark gray footer area containing several logos: 'finder', 'THE AUSTRALIAN BRAND AWARDS', 'ABA', and 'PRODUCT INNOVATION WINNER 2017'. Below these logos, there is fine print: '© 2022 copyright of Firstmac Limited ACN 094 145 963 | Australian Financial Services Licence / Australian Credit Licence 290600'.

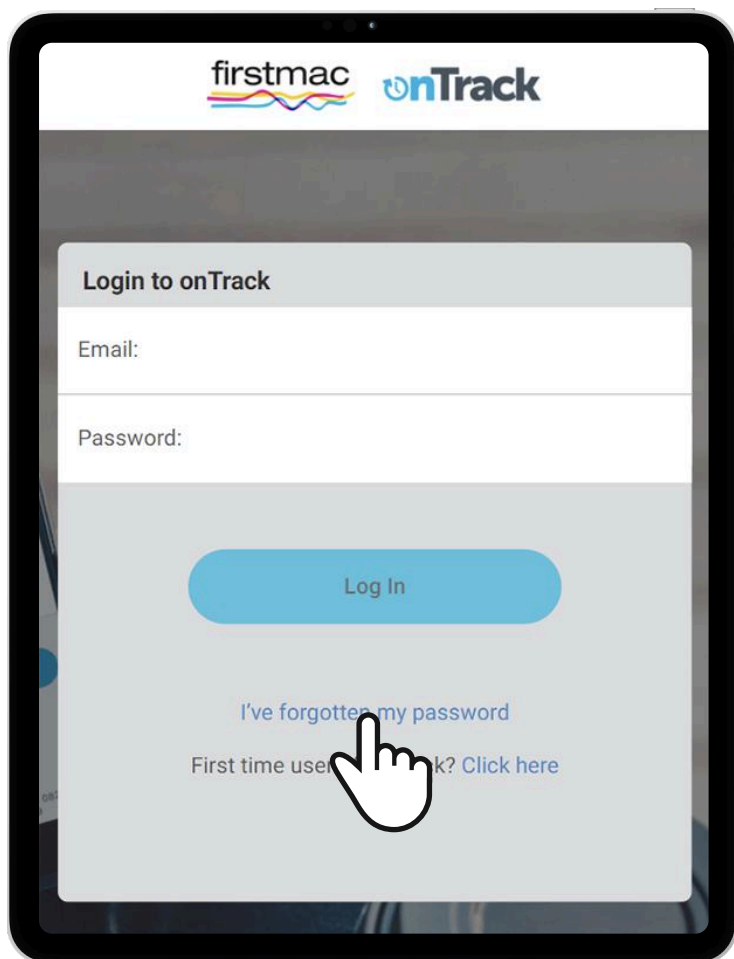


A close-up photograph of a woman with dark, curly hair, smiling and looking down at a smartphone she is holding with both hands. She is wearing a blue denim jacket over a white t-shirt. The background is blurred, showing an indoor setting with some greenery. The text 'onTrack password reset' is overlaid in white, sans-serif font across the center of the image, with 'onTrack' on the top line and 'password reset' on the bottom line.

onTrack password
reset

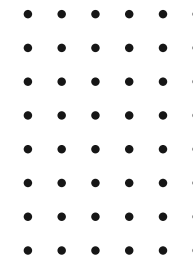
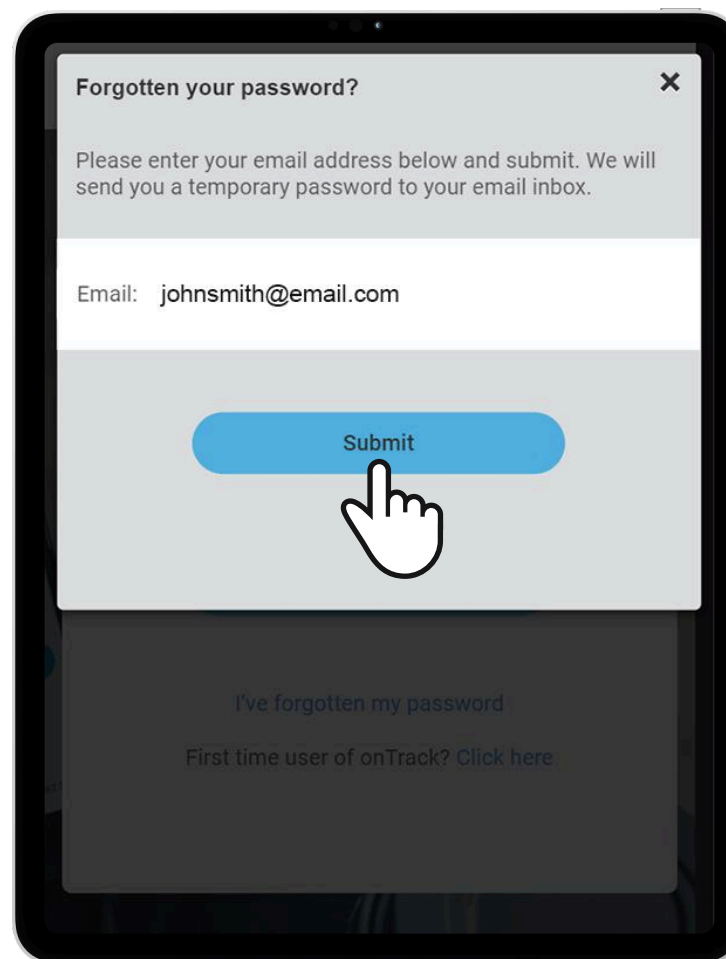
Step 1

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).



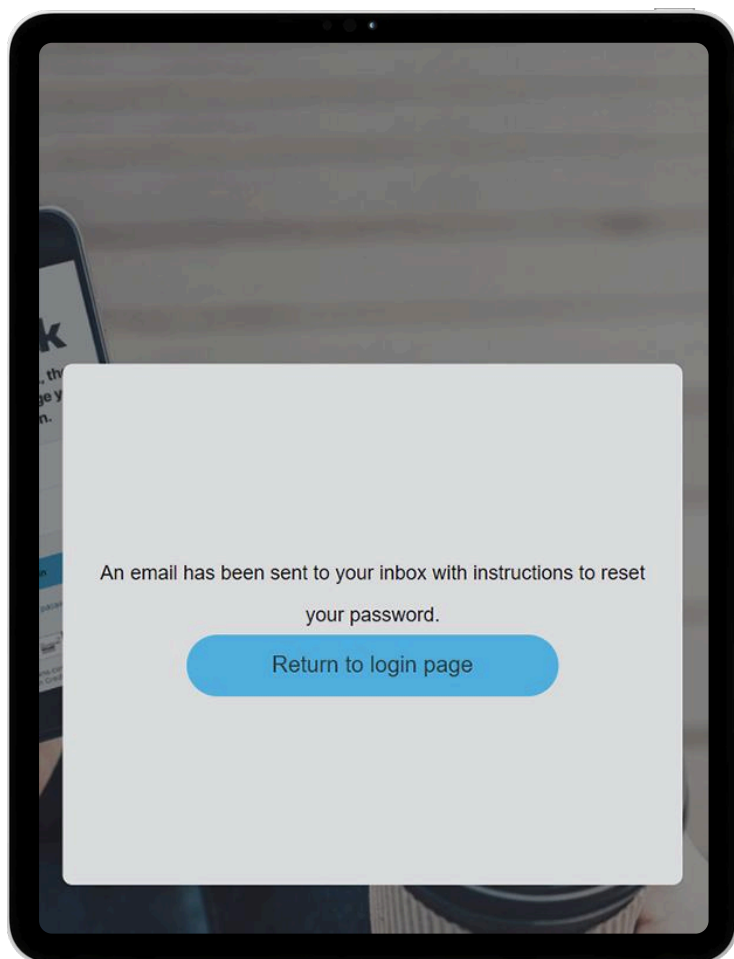
Step 2

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



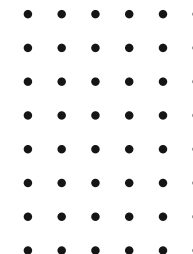
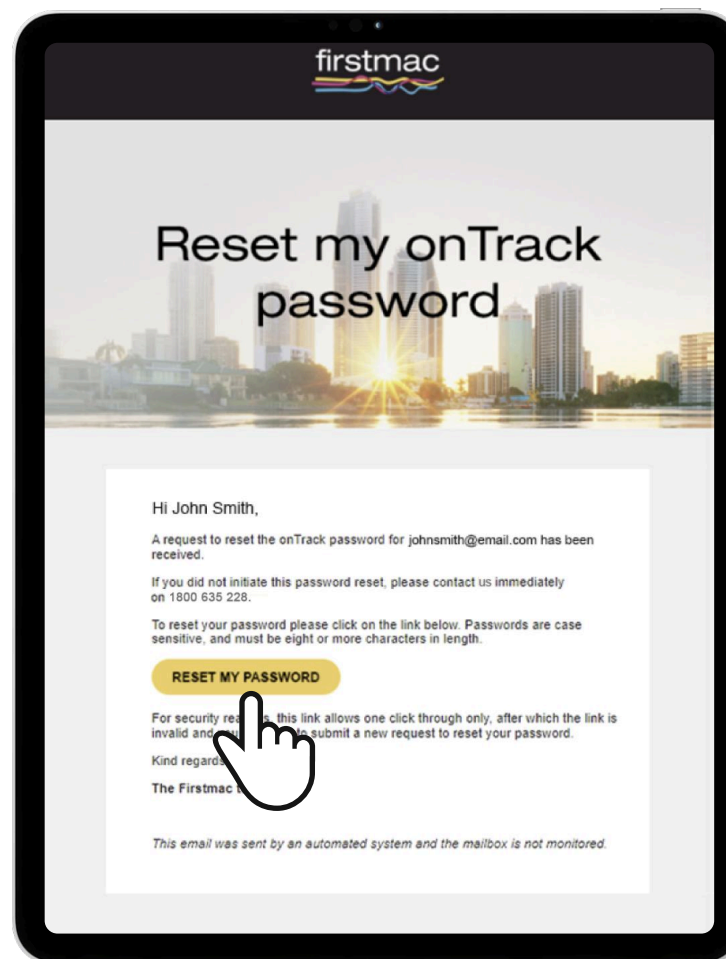
Step 3

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



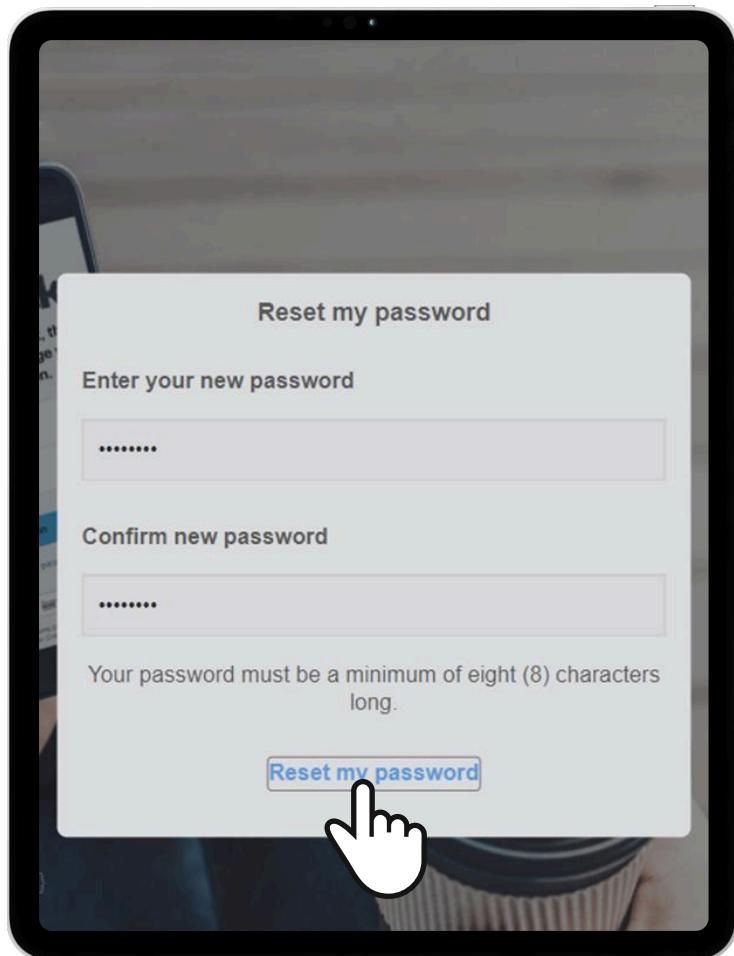
Step 4

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**.



Reset my password

Enter your new password

.....

Confirm new password

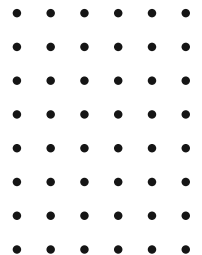
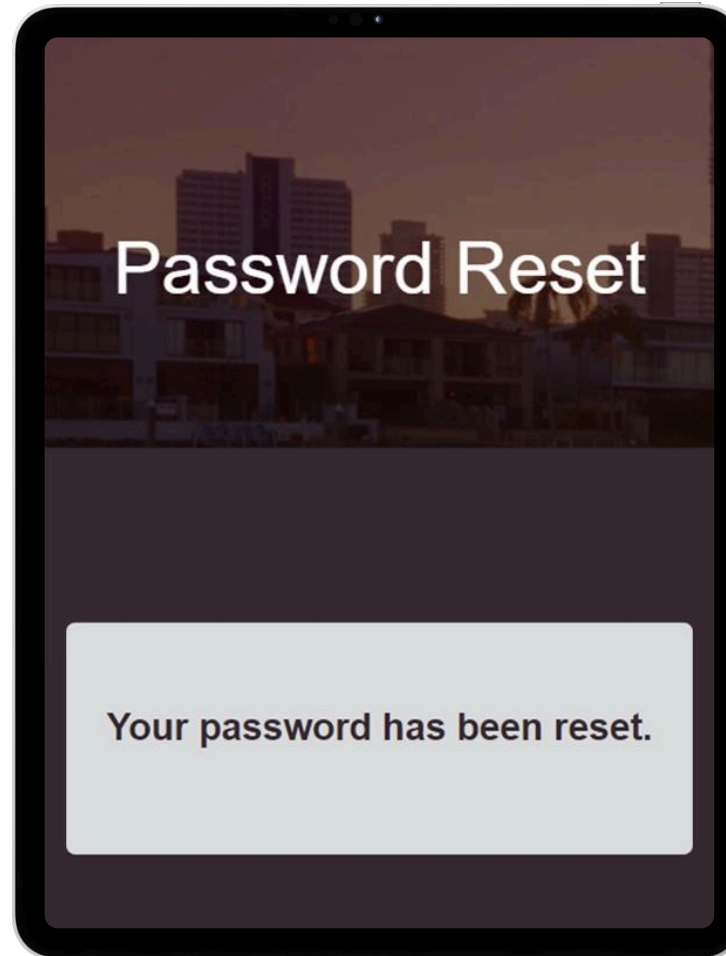
.....

Your password must be a minimum of eight (8) characters long.

[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.

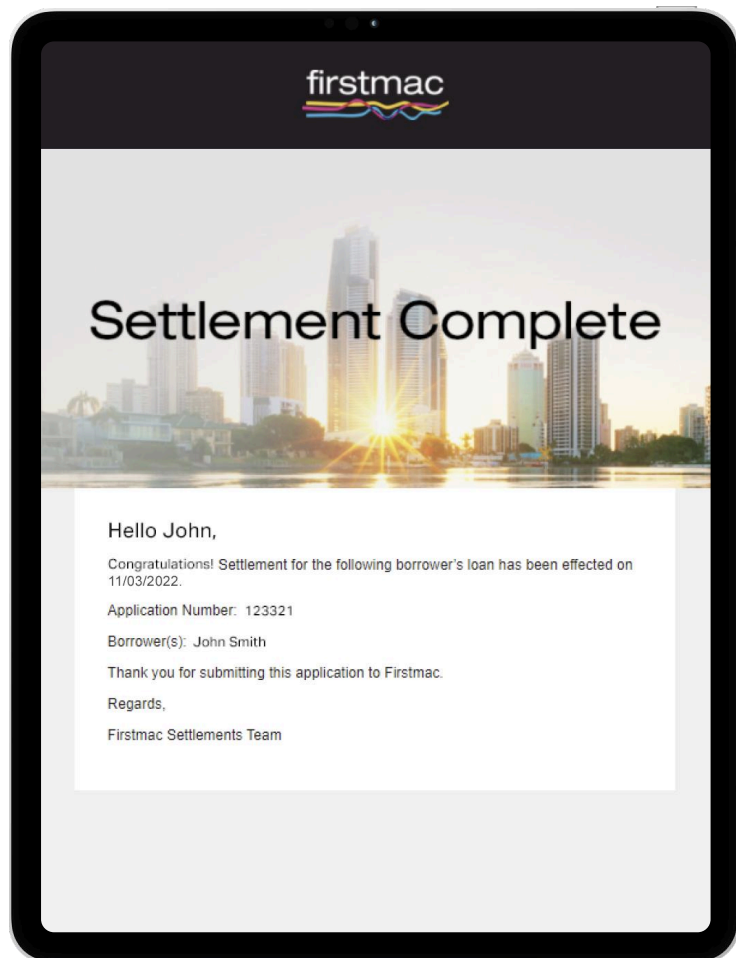


A close-up, shallow depth-of-field photograph of a person's hands holding a smartphone. The person is wearing a white lab coat, and their face is partially visible in the upper left corner, out of focus. The smartphone is held horizontally, and the back of the device, showing the camera lens and flash, is visible. The text "Viewing welcome letter" is overlaid in white, sans-serif font in the center of the image.

Viewing welcome
letter

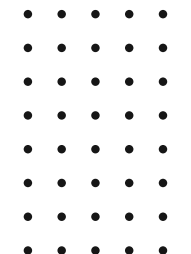
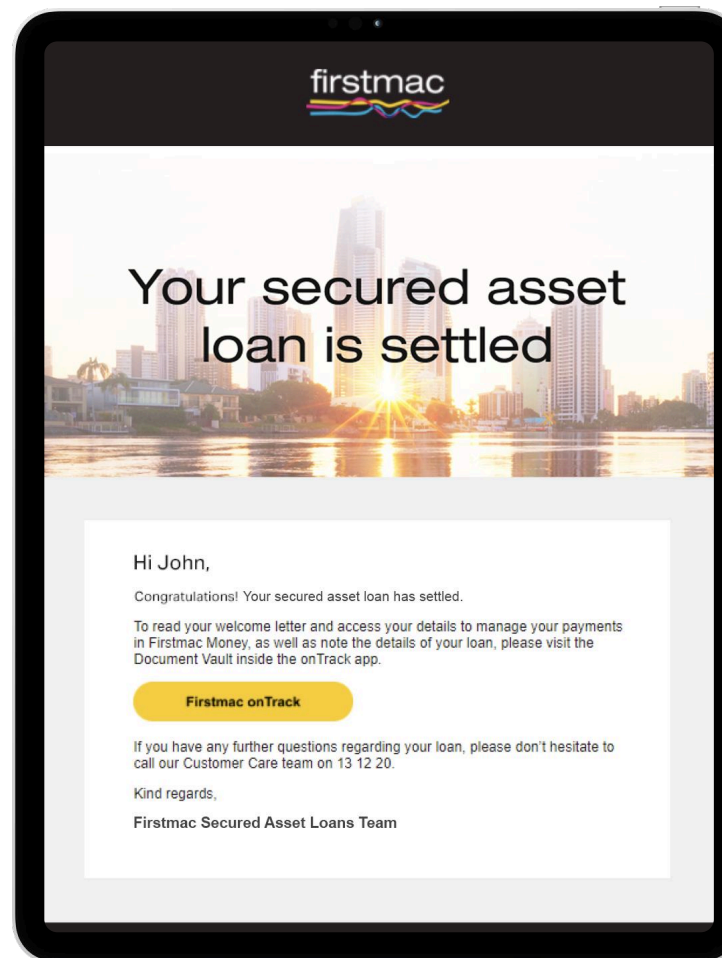
Step 1

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



Step 2

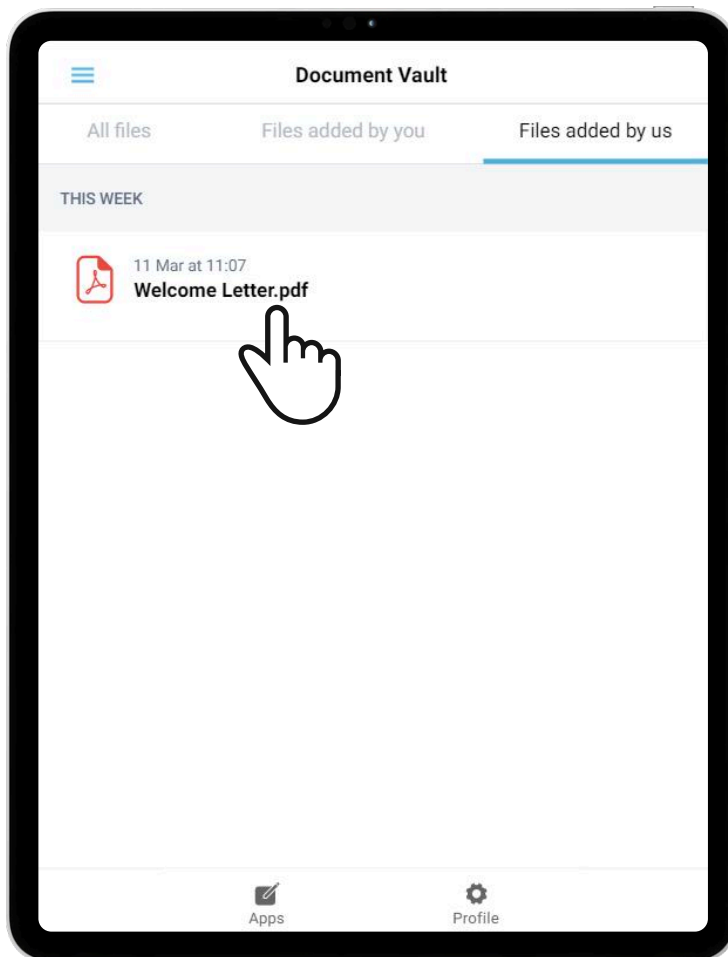
A **Welcome Letter** email will be sent to your customer the following morning.



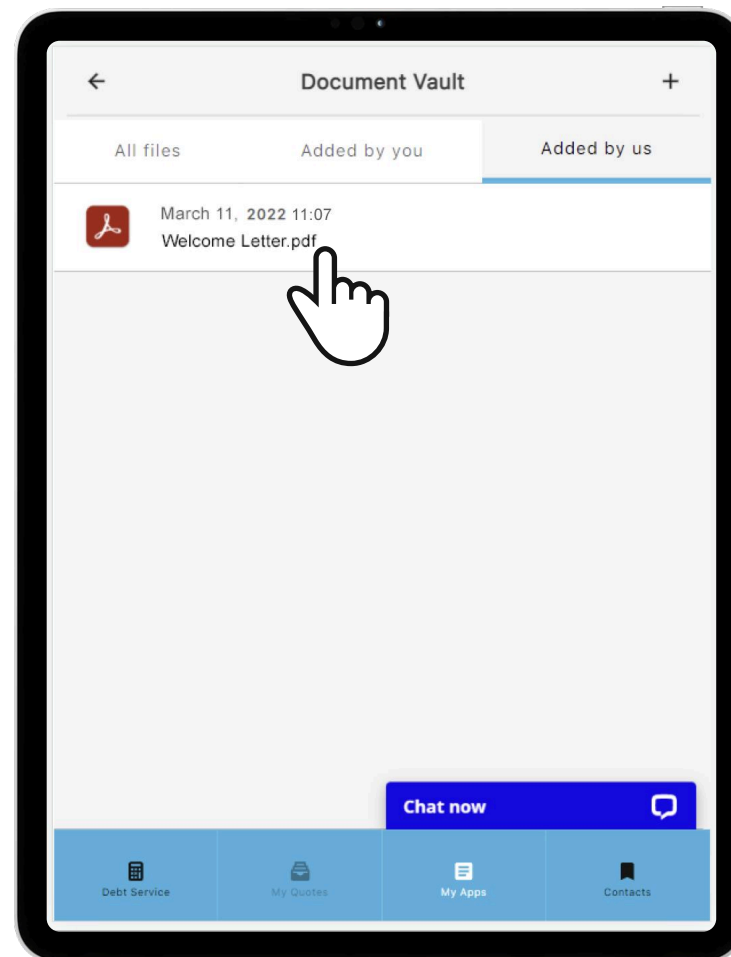
Step 3

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

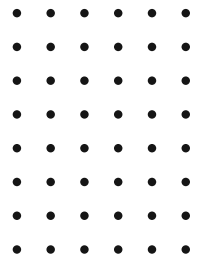
A copy is also saved to **Broker Tools Document Vault** for your reference.



onTrack



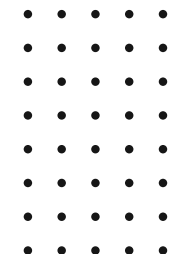
Broker Tools





Step 4

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

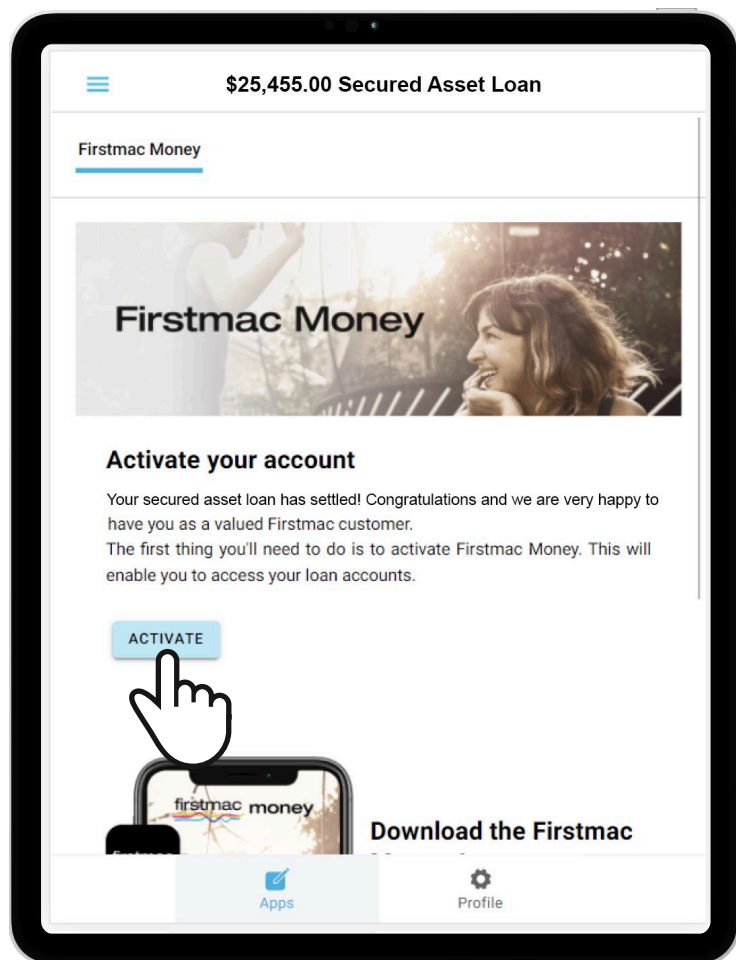


A close-up photograph of a person's hands holding a black smartphone. The person is wearing a light-colored, long-sleeved shirt. The background is blurred, showing a window with a wooden frame. The text "Firstmac Money account activation" is overlaid in white, sans-serif font across the center of the image.

Firstmac Money
account activation

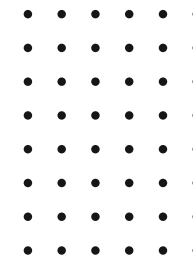
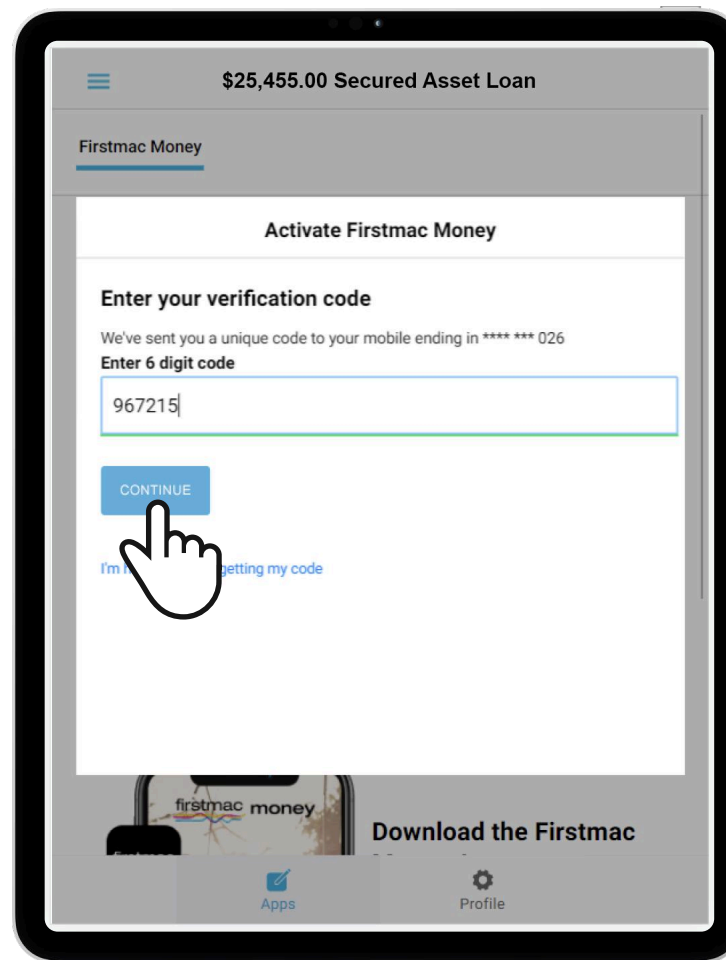
Step 1

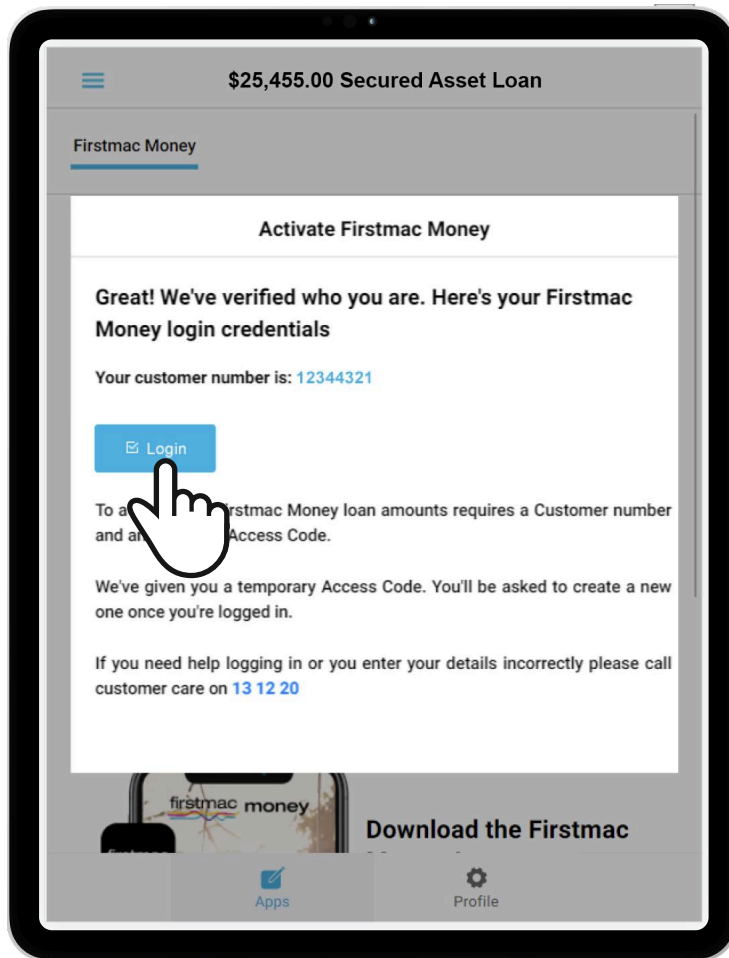
Upon selecting an application in onTrack, a page for Firstmac Money activation will load. Your customer will have to click **Activate** to initiate the process.



Step 2

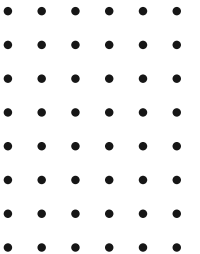
Your customer will receive a verification code to their mobile phone. Enter the code on the website and click **Continue**.





Step 3

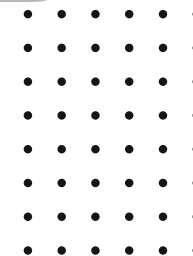
Upon successful verification, the system will provide your customer with their **Customer Number** and send a **temporary access code** to their mobile phone. By clicking Login, your customer will be directed to Firstmac Money.

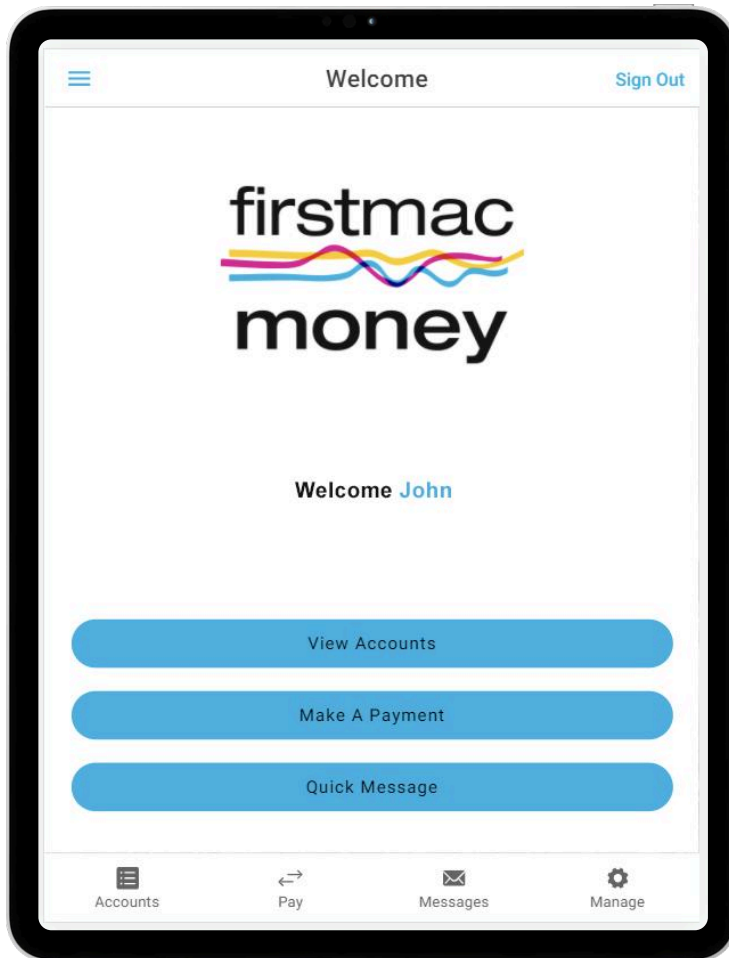


Step 4

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

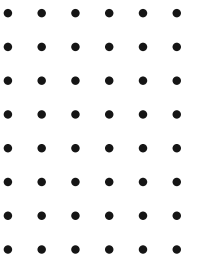
Click **Save** to proceed.





Step 5

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



DocuSign

Firstmac's DocuSign function allows your customers to sign their loan documents from their desktop computer or tablet. Just a couple of clicks and they are done. Documents are encrypted and a complete audit trail is maintained.

Please follow the steps below to send **car loan documents** to all parties via **DocuSign**.

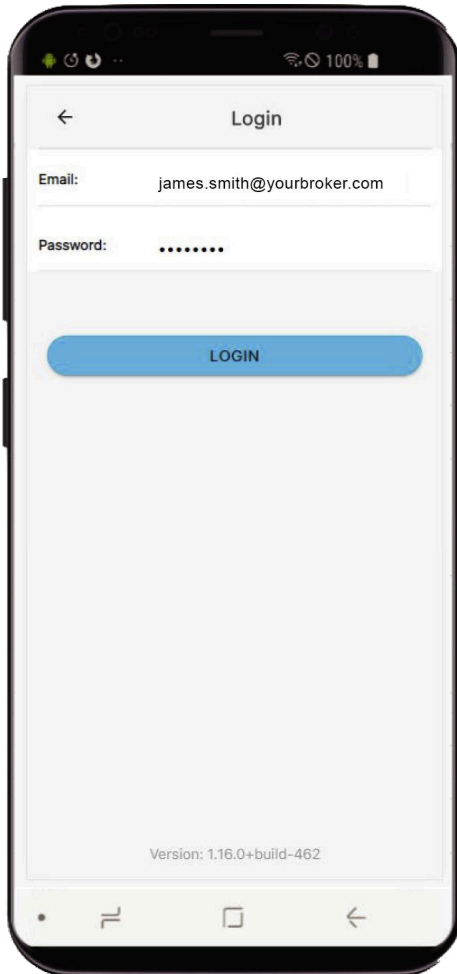


A man with a beard and glasses, wearing a blue button-down shirt, is sitting at a dark desk. He is smiling and looking down at a smartphone he is holding with both hands. On the desk in front of him is a white coffee cup and an open notebook. To his right is a laptop. The background is a blurred office or home workspace with a plant and a lamp.

Access DocuSign condition in Broker Tools

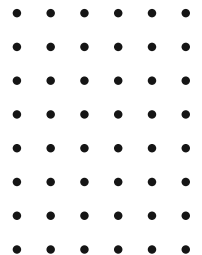
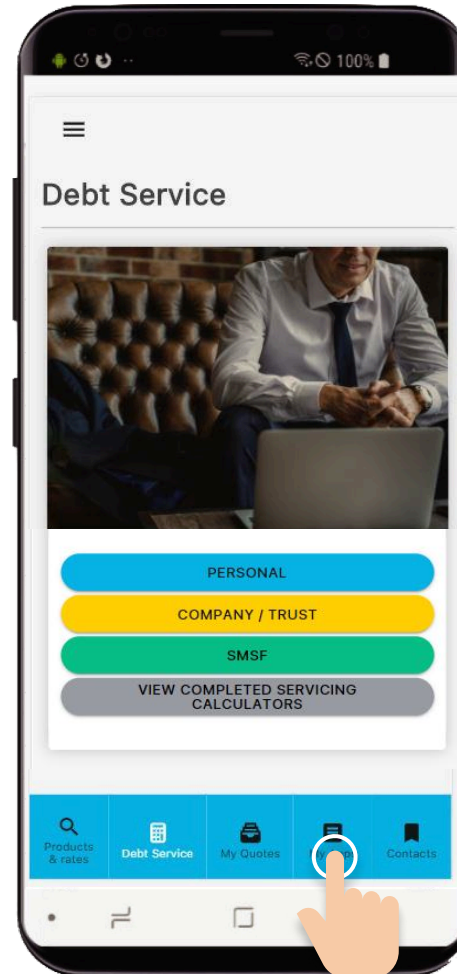
Step 1

Login to **Broker Tools**



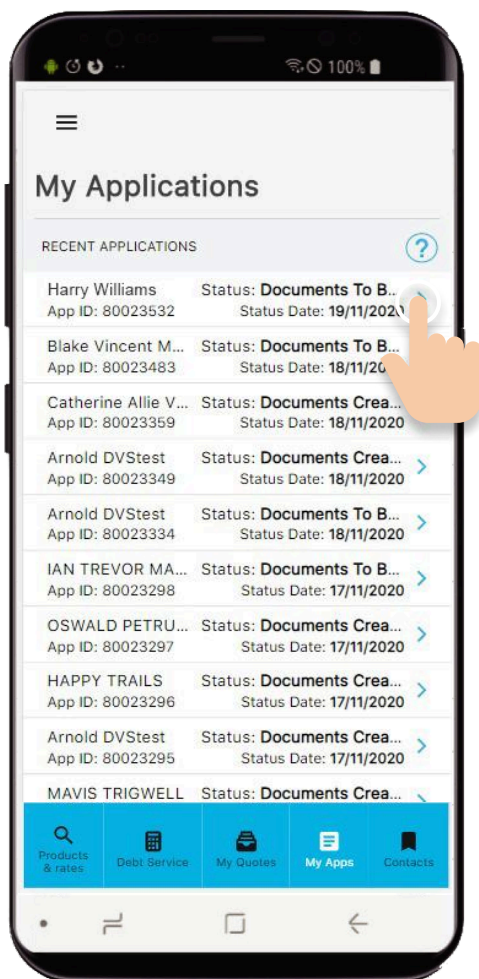
Step 2

Click on **My Apps**



Step 3

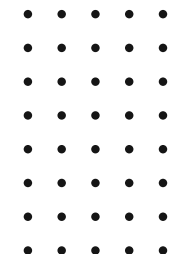
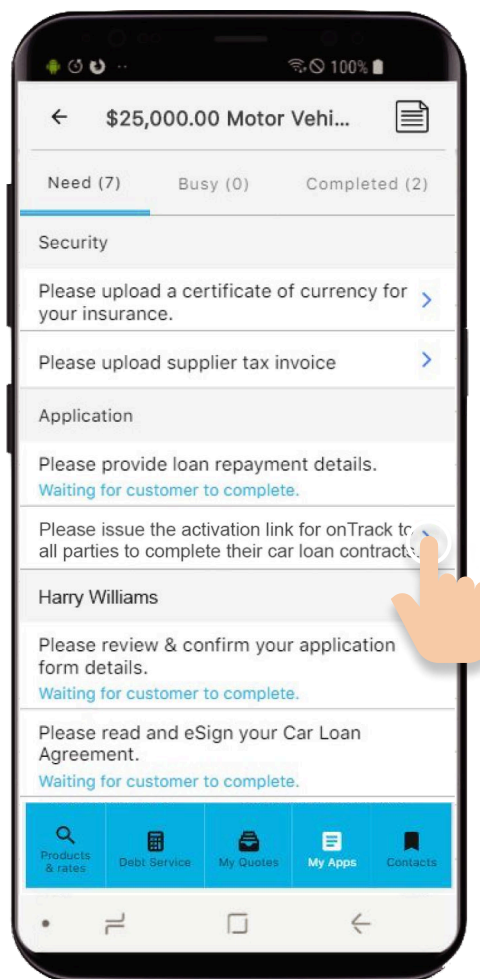
Select an **application**



Step 4

Under **Need** tab, locate and click on **DocuSign condition**:

"Please issue the activation link for onTrack to all parties to complete their car loan contracts."



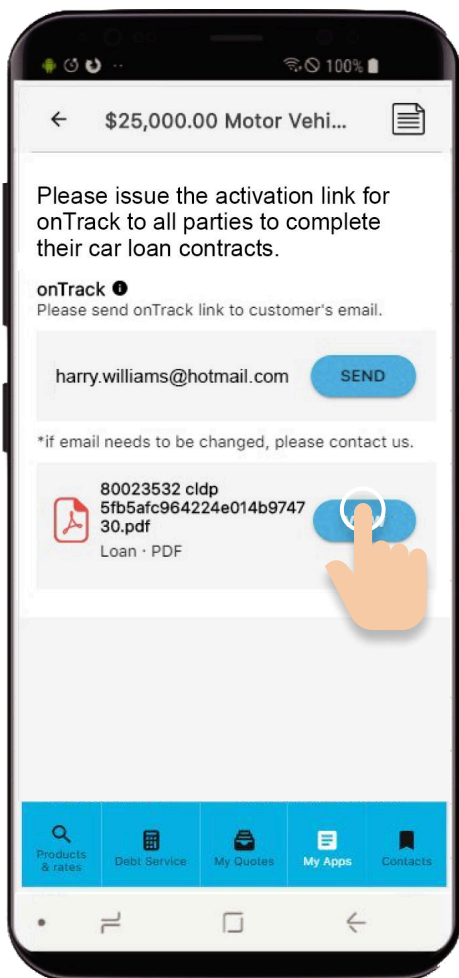
A woman with long dark hair and black-rimmed glasses is looking down at a smartphone she is holding with both hands. She is wearing a light blue denim shirt over a white top. The background is a blurred indoor setting, possibly a kitchen or office. The text "View Car Loan Contract" is overlaid in white on the left side of the image.

View Car Loan Contract

Step 1

Click on **View** button.

(The Car Loan Contract in pdf format will open in a new page). Please check the documents thoroughly and ensure they are correct, including any fees and commissions.



Step 2

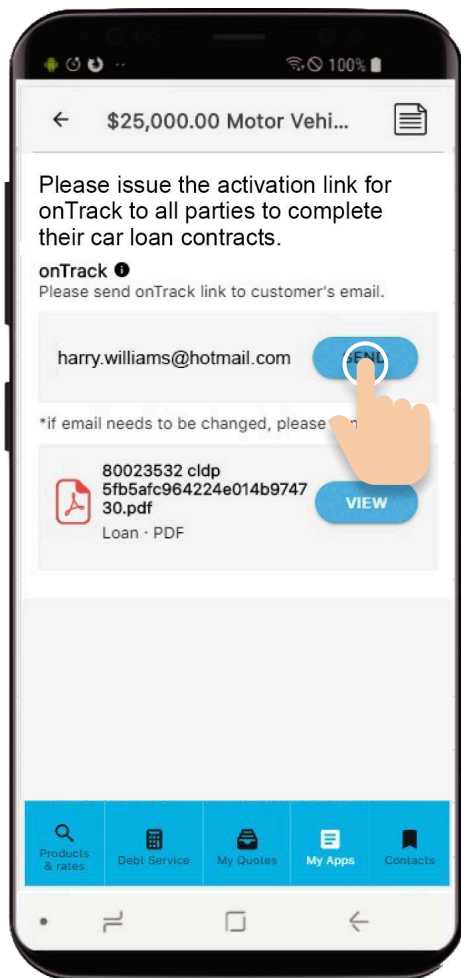
Click on **Download** icon.

(Document will be downloaded to your device)





Send DocuSign via Firstmac
onTrack to Customer

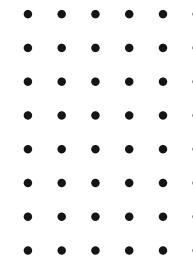


Step 1

After you are satisfied that the documents are correct, verify that the customer/s' email address is correct and click **Send**

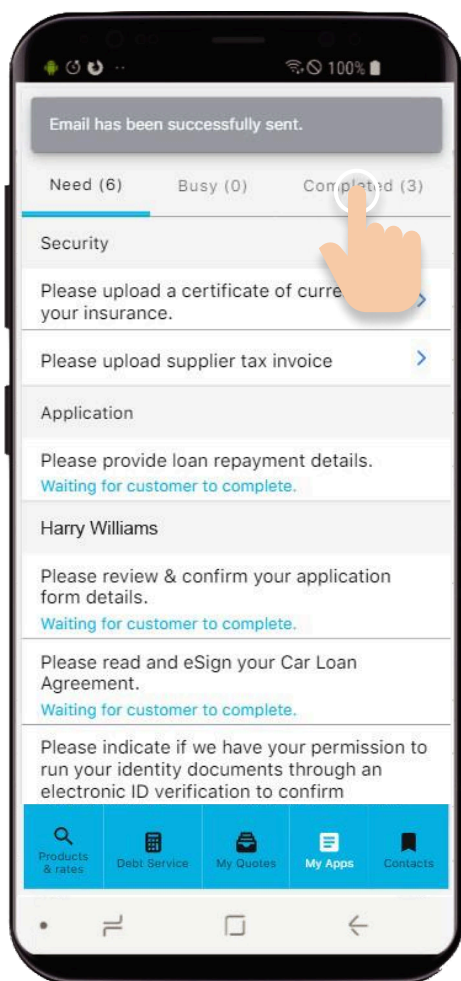
(An email with an onTrack login link will be sent to indicated email addresses. The Screen will then return to the Conditions Page and display a Confirmation banner. "Email has been successfully sent.")

Note: If the email address needs to be updated, please call Sales Support.



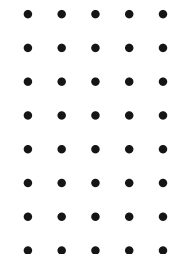
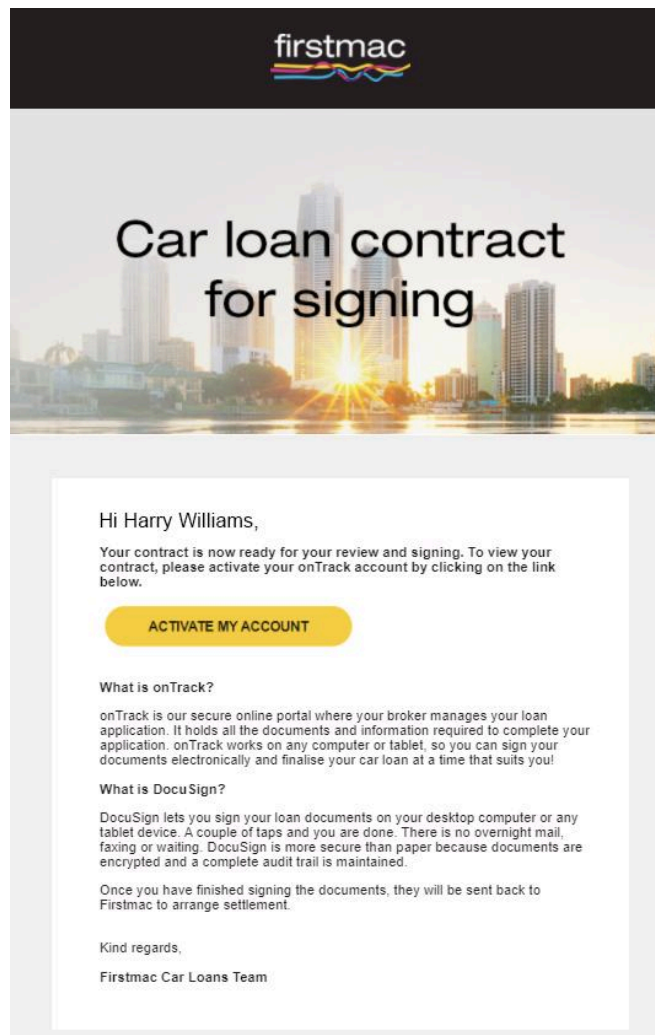
Step 2


Click on **Completed tab** and check the **DocuSign condition** is there



Step 3

This is the email the customer will receive.



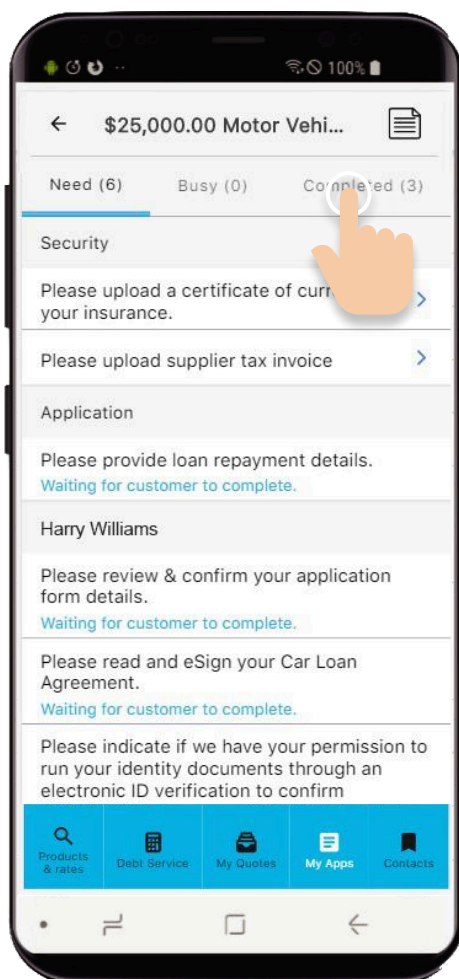
A person is shown from the chest down, wearing a light blue button-down shirt. They are sitting at a desk, using a laptop with their left hand on the keyboard and holding a black smartphone in their right hand. The background is blurred, showing a white wall and a window. The text "Re-Send DocuSign via Firstmac onTrack to Customer" is overlaid in white, bold, sans-serif font in the center of the image.

Re-Send DocuSign via
Firstmac onTrack to
Customer

If your customer says they have not received the email, you can resend it.

Step 1

Locate the **DocuSign condition** in the **Completed tab**

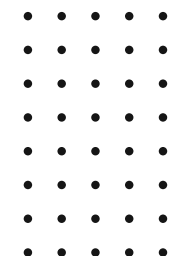
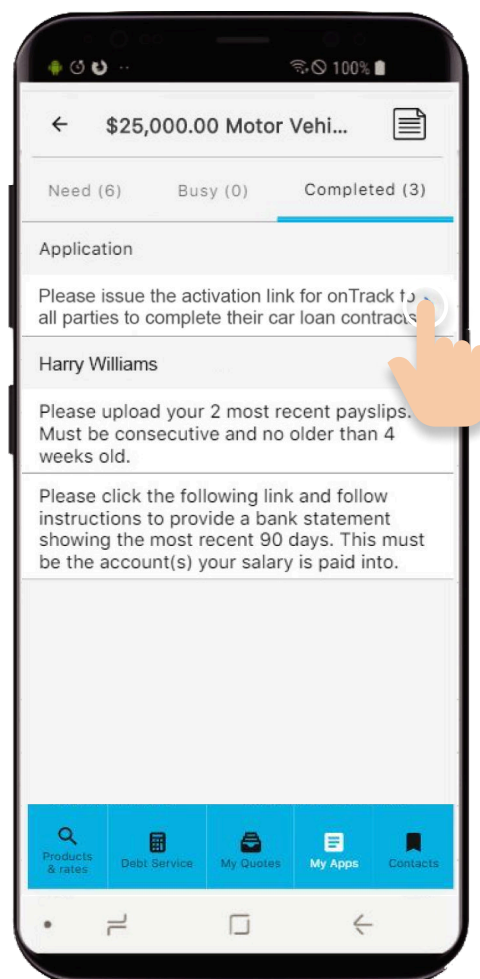


Step 2

Click on the **Condition** to reopen

Note: If all customers have already clicked the link to activate their Firstmac onTrack DocuSign account, the Resend button will be disabled.

If a customer has not yet clicked the link, a "Waiting confirmation" message will be displayed under the customer's email.

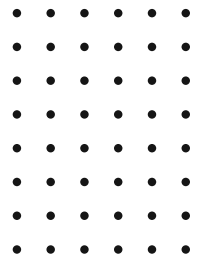
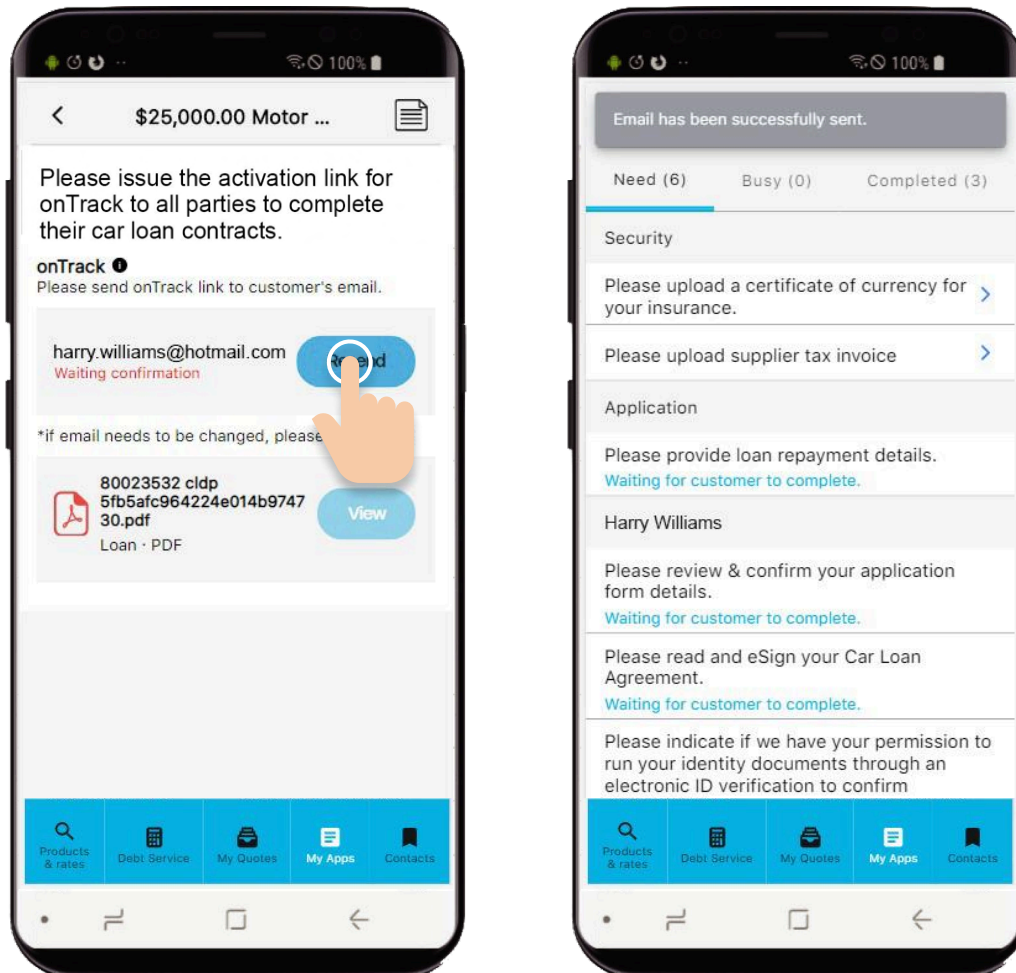


Step 3

Click **Resend**.

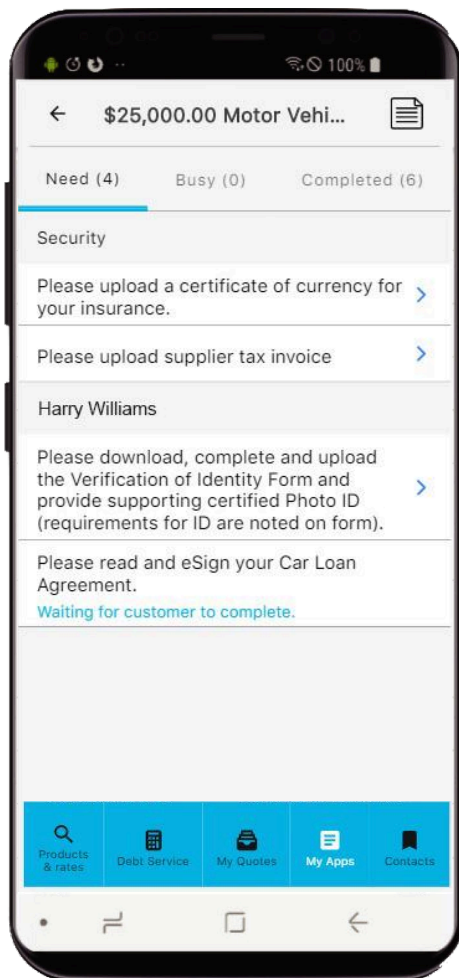
onTrack will reopen the Completed tab and display a confirmation banner:

"Email has been successfully sent."



A person wearing a white, long-sleeved button-down shirt is shown from the chest up, holding a smartphone with both hands. The background is a soft-focus outdoor scene with green foliage and a light sky. Overlaid on the image is white text.

How to check if your
customer has completed
the DocuSign process

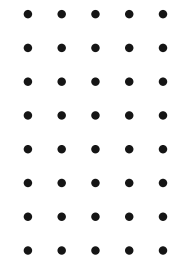


Step 1

When the document has been sent to the customer but has not yet been signed, the condition will state in blue **“Waiting for customer to complete”**.

When the customer has signed, the condition will move to the Busy or completed tab, and the blue message will disappear.

IMPORTANT: The documents will be returned directly to Firstmac and we will notify you.



If you have any further questions about outstanding conditions on your application please call our **Sales Support** team on **1800 223 999**.

