### **Customer Portal HowTo**

# Thinktank..

#### SUBMIT REQUESTS

The Customer portal gives you direct power to:

- Change your email and mobile details Profile option on the login icon
- View Loan details onscreen
- Request a redraw of \$5,000 or less
- Download issued Statements
- View and download Transactions
- Check Payment details for banking and BPay options

But for other requirements, you will need to submit a Request for our Loan Support team to action

You can find two locations for Requests

1. In the top menu – a summary list of all Requests for all loans

Thin	ktank	Home My F	Request	Documents	Notifications	More 🗸		Search	۹ 8
Cre	ate Case								
All Op	en Requests	All Requests							
All Op 5 items -	Sorted by Case N	5 🔻 👎	es - Status, '	Type, Case Origin + Updati	ed a few seconds ago			Q, Search this list	‡ •
	Case † 🗸 Number	Relationship v	Loan V	Category V	Sub Category 🗸 🗸	Subject	✓ Stat ✓	Date/Time Opened V Clos V Req V	Dat Clos V
1	00008556		126133	Management	Complaint		New	Co 11/11/2022 3:48 pm	V
2	00008557		126133	Customer Service	Online access to portal		New	11/11/2022 3:51 pm	W
3	00008558		151357	Management	Complaint		New	11/11/2022 4:04 pm	W
4	00008610		126133	Variation	Rate changes		New	7/12/2022 2:49 pm	¥
5	00008620		151357	Customer Service	Redraw	Redraw for \$15,000 required	New	8/12/2022 5:03 pm	W
			all Ioan	s included					

2. In the loan screen - this will show only for that loan and automatically attach that loan number

Thinktank Home My	Request Do	ocuments Notifications More V Search Q
Loan Details Redraw Transactions	Statements R	Payment Details
Case Number V Relationship V	Loan Number	✓ Category ✓ Sub Category ✓ Subject ✓ Status ✓ Created Date ✓ Created Date ✓ Request ✓ Created Date ✓ Created Date ✓ Request ✓ Created Date ✓ Created
00008610	126133	Variation 07/12/2022
00008557	126133	Customer Service 11/11/2022
00008556	126133	Management 11/11/2022

When submitting a case, you can select the Category which will reveal the Sub-category. Please be precise with your choice so we can provide you with the best possible service!

	_	
Category		Category
Variation		Customer Service
Sub Category	1	Sub Category
None	-	None
		Nere
None		None
Change of loan purpose or product		statement
Direct debit	Category	Online access to portal
Direct debit	Management	Redraw
Discharge	Management	Update borrower details
Rate changes		Collections
Change of repayment	Sub Category	Deferred payments
Change of repayment frequency		BPAY
Change of security	None	Account Summary Details
Extension of IO period	Nopo	Indicative Payout Figure
Increase repayment amount		Early Repayment Fee Calculations
Incurance - Cortificate of Currency	Complaint	Outstanding Arrears
Insurance- Certificate of Currency		Outstanding Arrears

Submit requests - Version 2.0

### **Customer Portal HowTo**

## Thinktank..

To create a case:

1. Click Create Case

Think	tank.	Home	My Reque	t Documen	ts Notificati	ons More 🗸			Search		٩	8
Creat	e Case											
All Oper	n Requests	All Requests										
All Ope	en Requests	▼ 👎										
5 items • S	iorted by Case Nu	mber • Filtered by A	ll cases - Sta	tus, Type, Case Origin •	Updated a few seconds	ago			Q Search this list	傘	r <b>≣</b> •	C,
	Case Number ↑ ∨	Relationship Name	V Loar	<sup>1</sup> ∨ Category	✓ Sub Category	✓ Subject	~	Stat 🗸	Date/Time Opened	Clos V Da Req Clo	t ~	
1	00008556	JenTestF TTF Smi	th 1261	53 Management	Complaint	Interestrated	hangenotification	New	11/11/2022 3:48 pm	Co		

2. Enter details on the form that appears with concise request that provides all necessary details

Category				
Customer Service				\$
Sub Category				
Early Repayment Fee Calculations				\$
*Loan Number				
* Subject				
Current Payout figure				
* Description				
Please provide the current payout	gure for this loan, required by 01April2023	and an official statement t	to date	

3. Click Next for the Case to be created, and the confirmation will appear

Thinl	ktank	Home	My Requ	iest	Documents	Notifications	More 🗸		Search	٩	Θ
Cas	e 000086	22 created	succ	essfull	y!	]					
										Close	
All Ope	n Requests	All Requests									
All Op	en Requests	• 🕴									
5 items + !	Sorted by Case Nu	mber + Filtered by A	All cases - !	Status, Type	, Case Origin + Upda	ited 6 minutes ago			Q Search this list	\$• × ■ •	C <sup>4</sup>
	Case Number ↑ ∨	Relationship Name	~ L0	an ∨ c	ategory 🗸	Sub Category	✓ Subject	✓ Stat… ✓	Date/Time V Opened	Clos V Dat V Req Clos V	
1	00008556			N	lanagement	Complaint		New	11/11/2022 3:48 pm	Co	

4. To refresh the list, please click on My Requests to see your new request listed

1 11111	ktank	Home	Му	/ Request	Documents	Notifications I	More 🗸		:	Search		Q	8
Creat	te Case		/										
All Ope	n Requests	All Requests	/										
All Ope	en Request	ts ▼ 👎 Number • Filtered by	y All ca	ases - Statu	s, Type, Case Origin + U	pdated a minute ago			Q, 5	Search this list	\$\$ •	•	C
	Case Num ↑ ∨	Relationship Name	~	Lo V Nu	Category 🗸 🗸	Sub Category	✓ Subject	∨ Sta	V	Date/Time V Clo Opened Re	V Da.	~	
1	00008556	/			Management	Complaint		Ne	w	11/11/2022 3:48 pm			Ŧ
2	00008557	/			Customer Service	Online access to portal		Ne	w	11/11/2022 3:51 pm			¥
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4	00008610	/			Variation	Rate changes		Ne	w	7/12/2022 2:49 pm			¥
5	00008620				Customer Service	Redraw	Redraw for \$15,000 required	Ne	w	8/12/2022 5:03 pm			¥
6	00008622	1000			Customer Service	Early Repayment Fee Calculations	Current Payout figure	Ne	w	8/12/2022 5:48 pm			Ŧ

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