Broker Use Only

Broker Portal Troubleshooting.

We're committed to safe and seamless experiences that empower our brilliant brokers.

This guide will cover some common errors and issues that may be experienced within the broker portal along with some suggested fixes.

Please note this guide is not exhaustive, if the issue persists, reach out to us using the broker chat or call 1300 130 881.

What's New?

As part of the new Bankwest experience, several resources have found new homes in the Bankwest Broker site.

The below items are now accessed from the new broker home page and can be reviewed without logging into the portal.

- Broker forms page
- Discharge Authority
- Building Insurance FAQs
- Digital Signing FAQs
- Health & Wellbeing Assistance program
- Broker accreditation and support page

You will still need to login to the Bankwest Broker portal to access the below items.

- Active Applications
- Existing Loan details
- Valuation tool
- Pricing Tool
- Policy Search
- Rate tables and income verification information.

Contents

Cannot Login to the Portal

If your login is not allowing you through to the portal:

- Ensure the password has been manually typed rather than using one saved by the browser.
- The password can be reset via self-service by clicking “Forgot your password?”
- If the page is showing “Access denied”, it means that too many incorrect password attempts have been made. You will need to wait for 30 minutes before attempting again.
- Antivirus / Malware programs and extensions may flag the Broker Portal as a suspicious website. If prompted, we recommend to allow the website and marking it not to be blocked again. Website blocked may be listed as identity.ibs.bankwest.com.au.

Attempt login on a mobile device and a different browser. If successful, the original browser / device may be the cause of the issue.

Saved out of date passwords may prevent login even if manually re-typed. Deleting the saved passwords in the browser may resolve this.

For **Microsoft Edge**:

1. Click the three dots on the top right of the browser.
2. Click Settings.
3. Click Profiles.
4. Click Passwords.
5. Find the Bankwest Broker website.
6. Delete.

For **Google Chrome**:

1. Click the three dots on the top right of the browser.
2. Click Settings.
3. Click Autofill and Passwords.
4. Click Google Password Manager
5. Find the Bankwest Broker website.
6. Delete.

If the above information does not resolve the issue, please see the additional troubleshooting page here.

Common Issues

Broker portal stuck at 'Logging In' page.

If you can login, but the portal never loads past the below page:

- Manually searching for the broker portal, rather than using a saved link.
- Clearing cookies and cache, instructions for this can be found here

Able to login to the portal, but different apps are not loading

Date and time may not be automatically synced (date and time may appear to be accurate however, the sync feature must be enabled.)
Please see instructions here.

Broker support user cannot see any loan details in the portal.

Login to the applicable brokers account and delete and re-add the support user. (these errors occur when the support user has reached their expiry date, or the setup was not completed in full)

When logged in, the brokers code must appear next to the support user ID, if this cannot be seen the account must be re-registered as above.

If the above information does not resolve the issue, please see the additional troubleshooting page here.

Loan not visible on the ‘Existing Loans’ tab.

If a pricing request has recently been accepted and applied to a loan, these will drop off the ‘Existing Loans’ tab for up to 48 hours. Once the pricing has been successfully loaded the loan will become visible again.

If you have contacted the broker support team to complete a pricing request on an existing Bankwest customer, and there was ‘no offer available’ the loan will not become visible under ‘Existing Loans’.

If an offer was available for an existing fixed loan via the pricing tool, please allow up to 48 hours for the loan to become visible in the ‘Existing Loans’ tab.

Only loans written using your current broker will be visible, loans written under old broker codes or by other brokers will not show under ‘Existing Loans’.

Loans with a collections hold applied will appear in the broker portal, but no details will be available. If the portal is showing an error saying loan details could not be retrieved, please contact your customer to ensure the account is in order.

If the above information does not resolve the issue, please see the additional troubleshooting page here.

Application not visible under ‘Active Applications’.

If a submitted deal has not reached a new milestone for over 120 days, they will no longer appear under active applications.

In these cases, additional documents will need to be emailed through to Supportingdocs@bankwest.com.au

If a deal has not been modified for 180 days, the deal will expire and will need to be re-submitted.

The below are the events that will restart the 120-day timer:

- Application submission
- Deal approved-in-principle
- Deal conditionally approved
- Deal unconditionally approved
- Loan contracts issued
- Loan contracts signed and returned

Please note, the customers will still be able to view their application in the Application Status Tracker even if the deal no longer shows on ‘Active Applications’.

If the deal was only recently submitted, applications can take up to 30 minutes to begin appearing on the ‘Active Applications’ page. The page can be refreshed by pressing Ctrl + F5

If the above information does not resolve the issue, please see the additional troubleshooting page here.

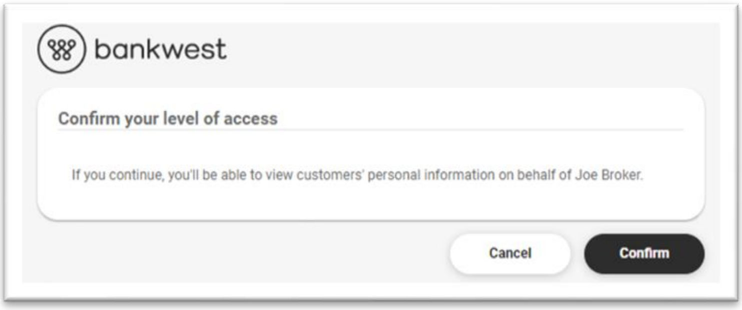
Broker Support User Troubleshooting.

Support user accounts will be disabled after 90 days of inactivity. Once disabled, the Applicable Broker must remove the user from their access list and re-add them to restore access.

When a Broker Support User is created using the 'Manage Support User's Function', the new support user will receive an email to accept the terms and conditions and complete their account set-up.

This process not being fully completed is a common cause of support user access issues.

Users must hit confirm on the final confirmation screen as this is a common cause of access issues. The below is the final confirmation once the registration has been completed.



Aggregator Support Users experiencing issues should contact their aggregator for support.

BS code appearing without the Broker code in brackets next to it.

BS user will need to re-complete registration, as it has not been completed in full.

If registration has been completed and issue persists, restart the self-setup process by clicking the link in the welcome email in a private window (Ctrl + Shift + N)

If both the above steps are unsuccessful, login to the applicable brokers account and delete and re-add the support user.

Additional Troubleshooting

Check the browser for any extensions

If extensions are installed, disable them one by one and retry.
Cryptocurrency and password extensions are known to cause issues

1. Click the Extensions or Plugins menu in the browser
2. Locate the Extension or Plugin you wish to disable and click the toggle to switch it off
3. Attempt to load the broker portal.

Check the computer date and time setting are set to auto-update

On Windows Computers:

1. Click the Start / Windows button
2. Go to Settings
3. Click Time and Language
4. Click ‘Sync Now’ or ‘Set Time Automatically’

On Mac Computers:

1. Click the Apple Menu
2. Go to system Settings
3. Click General in the sidebar
4. Click Date & Time on the right (You may need to scroll down)
5. Set ‘Date & Time’ and ‘Time zone’ to automatic.

Please see next page

Additional Troubleshooting

Clear cache / cookies

Please be aware this will clear website auto-complete data and passwords and should only be completed once all other steps have been attempted.

For Google Chrome:

1. Click the three dots on the top right of the browser.
2. Click Settings.
3. Click Privacy and Security.
4. Click Clear Browsing Data
5. Set time range to “all time”.
6. Tick boxes titled Cookies and other site data and Cached Images and Files.
7. Click ‘Clear Data’.

For Microsoft Edge:

1. Click the three dots on the top right of the browser.
2. Click Settings.
3. Click Privacy, search and services.
4. Under ‘Delete Browsing Data’, Click Delete Browsing Data.
5. Untick all boxes, except Cookies and other site data and Cached Images and Files.
6. Click Clear Now.

Once all the above steps have been completed, please test the portal in another web browser / Incognito mode.

(This is not meant to be a fix but will help to narrow down what is causing the issue)

Please note this guide is not exhaustive, if the issue persists, reach out to us using the broker chat or call 1300 130 881.