

ApplyOnline®

Broker Notification Settings Quick Reference Guide

Step 1: Brokers click on their initials in the top right of ApplyOnline.

The screenshot shows the NextGen Net Broker Centre dashboard. At the top right, there is a search bar for application IDs and a user profile icon with the initials 'PP'. A dropdown menu is open, showing the user's name 'Peter Paspalas' and options for 'Settings', 'Change Password', and 'Log Out'. The main dashboard area includes a welcome message for Peter, a 'What would you like to do?' section with buttons for 'New Assessment', 'View Draft Assessments', 'Valuation Request', and 'View Draft Valuations', and a 'Recently Viewed Applications' table.

Status	ID	Lender App ID	Applicant Names
Outstanding Items Last viewed a day ago	400000871	NGBroker/400000871	Jean Citizen

Step 2: Brokers click on the settings button.

Step 3: Brokers check or uncheck how they would like to receive notification of status changes for their applications.

View settings for: Paspalos, Peter /None [Go]

Your user settings

Name: Peter Paspalos
Email Address: peter.paspalos@nextgen.net
Contact Phone #:
Mobile (for sms): 0499999999
Fax #:

Select how you wish to receive notification of the reported Status below.

Application Status	Email	SMS
Referred	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Conditionally Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Settled	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Error On Submission	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save]

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Step 4: Brokers click on 'Save' to lock in those changes.

Step 5: Brokers click on the 'Events' tab to manage their notification methods for their applications events.

Select how you wish to receive notification of the reported events below
Events that are disabled can be set from the Status tab.

Select a lender from the drop down to view notification settings for a specific lender: <- ALL ->

Event	Email	SMS
Referred to Assessor	<input type="checkbox"/>	<input type="checkbox"/>
Grant Conditional Approval	<input type="checkbox"/>	<input type="checkbox"/>
Application Settled	<input type="checkbox"/>	<input type="checkbox"/>
Error On Submission	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
eSign Request Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
eSign Status Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Assigned	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Instructed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Delayed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Accepted	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Inspected	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Received	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Valuation Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Received	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cancel Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leader Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Declined	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automatic Withdrawal Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Approval Expiry Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Registered	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 6: Brokers select and deselect their preferred notification method for each event. They can also check the box under 'Email' or 'SMS' to check/uncheck all subsequent boxes.

Automatic Withdrawal Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Approval Expiry Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Registered	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supporting Docs Received	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Outstanding Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pre-Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Grant Unconditional Approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Valuation Ordered	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Withdrawn	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Docs Received	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Docs Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solicitors Instructed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents Issued	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents Incomplete	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents Reissued	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents Returned	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ready For Settlement	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Settlement Booked	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Settlement Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Settlement Delayed	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

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Step 7: Brokers click on the 'Save' button to lock in their changes.

Note: Some aggregator groups manage notifications through their CRM system and not ApplyOnline.