

➤ Partner Portal

Broker Onboarding

May 2022



What is the Partner Portal?

A single portal for Introducers to engage with us

Dashboard

Single portal, all products, end-to-end capabilities

Lead Generation Marketing

Marketing-in-a-Box, Social, newsletter/email templates, current/newsworthy content, lead tracking & analytics

Tools & Calculators

Asset Finance Quick Quote, Product Selector tool, Working Capital Calculator

Apply & Refer

Track status, Apply (AF FastDoc/FullDoc), Refer (DF & Trade)

Commission & Income Tracking*


Statements, performance benchmarking

Client & Partner Analytics*

Client next best action/cross-sell

* Coming soon

> Logging In



1. Create User Profile 2. Create Company Profile

Please verify your email address using a one-time code sent to your inbox.


Email Address

Send code

Already have an account? [Sign in here](#)

- This step is skipped if the Broker has been Invited to the Portal

1. Visit: partner.scotpac.com.au
2. Click on 'Sign up Now'
3. Follow the steps to register



1. Create User Profile 2. Create Company Profile

Given Name Surname

Country

Australia(+61)

Mobile Number

Email Address


rperabtani+5@gmail.com

New Password

☐ I accept the ScotPac Partner Portal [Terms and Conditions of Use](#)

Create

- This will be pre-filled based on details in our CRM



1. Create User Profile 2. Create Company Profile

Company Name

Company ABN

Registration Date

dd/mm/yyyy

Address Lookup

Type to search address...

Address Line 1

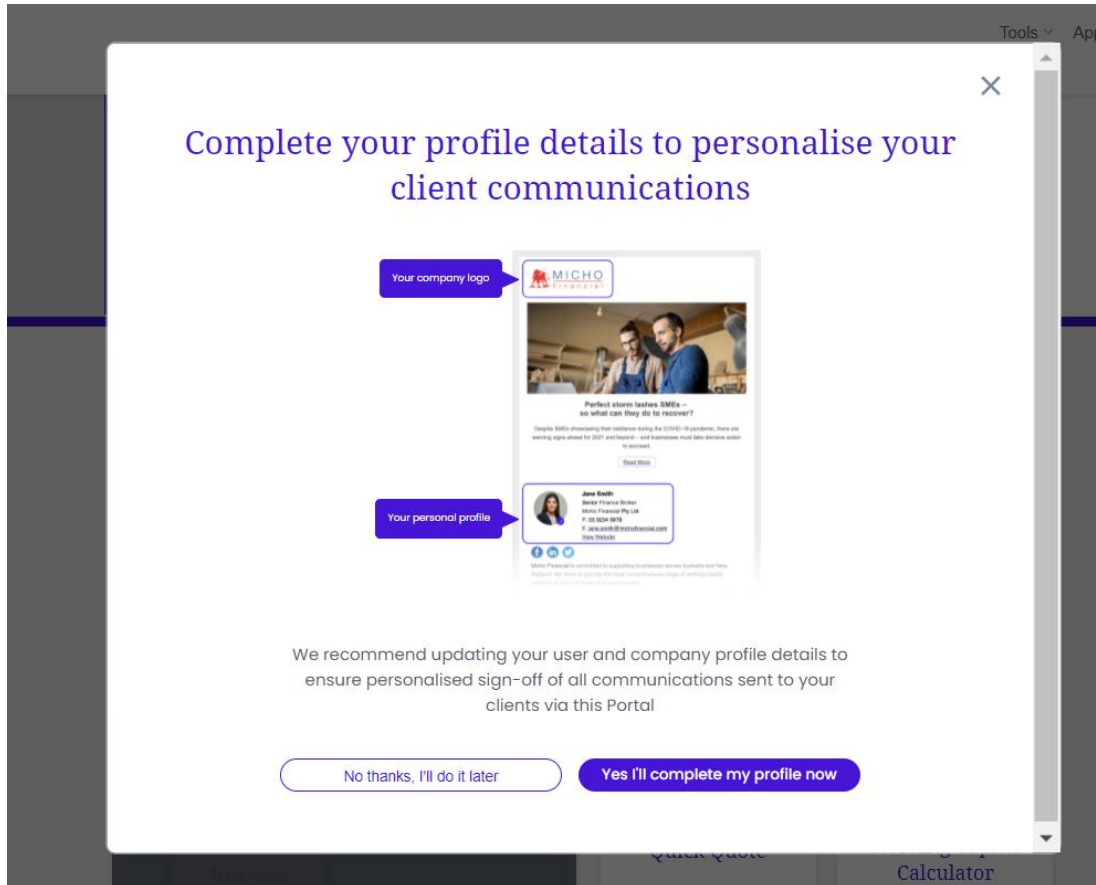
Address Line 2

Address Line 3

Suburb Postcode State

- This will be pre-filled based on details in our CRM

➤ Setting up your Profile



The screenshot shows a modal window titled "Complete your profile details to personalise your client communications". It features two callout boxes: "Your company logo" pointing to a placeholder for a logo, and "Your personal profile" pointing to a placeholder for a personal profile. The placeholders show a sample logo for "MICHOL FINANCIAL" and a sample personal profile for "Jane Smith". Below the placeholders, there is a paragraph of text: "We recommend updating your user and company profile details to ensure personalised sign-off of all communications sent to your clients via this Portal". At the bottom, there are two buttons: "No thanks, I'll do it later" and "Yes I'll complete my profile now".

Complete your profile details to personalise your client communications

Your company logo

Your personal profile

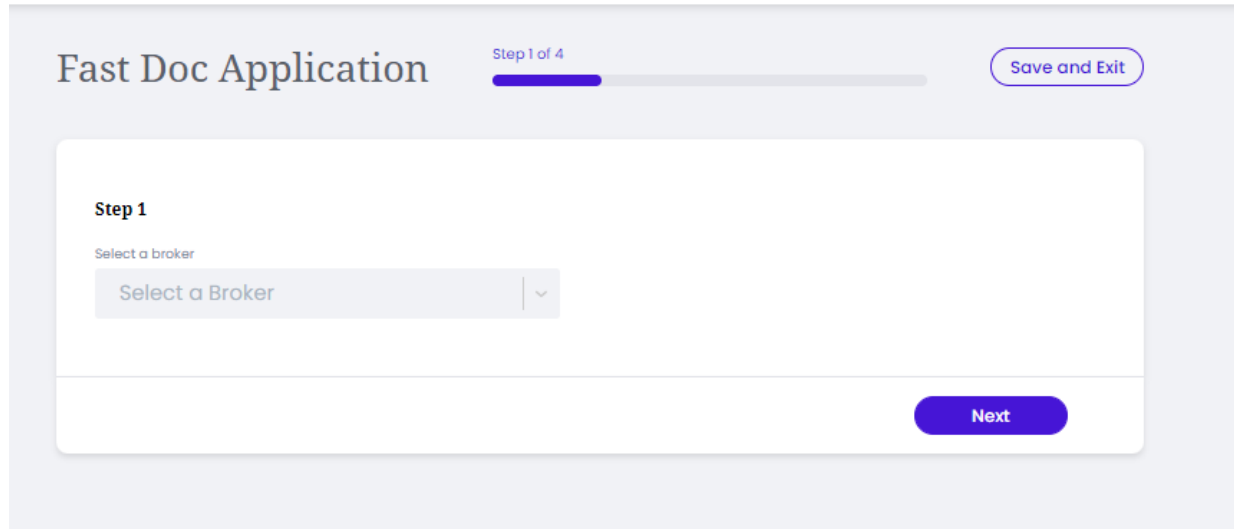
We recommend updating your user and company profile details to ensure personalised sign-off of all communications sent to your clients via this Portal

No thanks, I'll do it later

Yes I'll complete my profile now

1. At first login, you'll receive a prompt to complete your profile.
2. Upload your company logo so that Asset Finance Quotes and other client communications are branded by you
3. Complete the rest of the profile details so that other Lead Generation Marketing has your contact details in the sign-off


➤ The Company / Admin Role



The screenshot shows a web application interface for 'Fast Doc Application'. At the top, it says 'Step 1 of 4' with a progress bar. There is a 'Save and Exit' button in the top right. The main content area is titled 'Step 1' and contains the instruction 'Select a broker'. Below this is a dropdown menu with the text 'Select a Broker' and a downward arrow. At the bottom right of the main content area is a blue 'Next' button.

1. Users assigned the 'Company' or Admin role will allow staff members in your organisation to submit applications on behalf of brokers
2. Applications submitted by these individuals will appear in both the Company and applicable Broker user's dashboard

Asset Finance Quick Quote



Quick Quote

Asset Cost

\$

Deposit

\$

Term

Term

Fees

\$

Balloon

\$

Interest Rate

%

Brokerage Rate

%

Instalments In

Advance

Total amount financed

\$0.00

Balloon

\$0.00

Brokerage

\$0.00

Customer rate

0%

Instalment cost per month

\$000

Client Name

Client Name

Client Email

Client Email

Save

Start Application

Please send client

☒ Quick Quote
☐ Privacy Consent Form
☐ Application Form

Email to client

Asset Finance Quote - Test

Rosy Perabtani

<partner.service.test@scotpac....


11:16 AM (0 minutes ago)

☆

↶

⋮

to me



Asset Finance Quote

Hi Test,

Please find your quote, as discussed.

Asset Cost:

\$100,000.00

Deposit:

\$1,000.00

Term:

24 months

Balloon:

\$2,000.00

Instalments in:

Advance

Total Amount Financed:

\$99,000.00

Instalment Cost Per Month:

\$4,636.82

Regards,

Rosy Perabtani,

MICHO FINANCIAL PTY LTD


This quote is valid for 30 days. Rates are subject to approval by ScotPac.

1. Create / Save Quotes
2. Send Quotes to your Client branded by you
3. Start an Asset Finance application from the Quote
4. Access Saved Quotes – edit / send to client / start an application from quote at a later date

➤ Applying for Asset Finance

×


Create Asset Finance


Fast Doc

Select this option if your business meets the following criteria:

- Business must be trading for over 2 years
- Finance up to \$150,000 in total
- Asset(s) must be less than 15 years old

Create


Full Doc

Select this option if your business does not meet the criteria listed for a Fast Doc application above

Create

Fast Doc Application

Step 1 of 4

Save and Exit

Step 1

Customer Details

Select existing or add new *

Add New

Company Name or ABN

Company name or ABN

Country/region

Australia

Company Details

Company Name *

Company Name

Trading name

Trading name

ABN *

ABN

ACN

ACN

Business Structure *

Select

Business registration date *

dd/mm/yyyy

GST registration date

dd/mm/yyyy

Address

Country/Origin

Australia

Address Lookup

Type to search address...

Address name *

eg. Head Office..

Address Line 1

Address Line 1

Address Line 2

Address Line 2

Suburb/City *

Suburb/City*

Postcode *

0000

State *

State

Primary Contact

Given Name *

Given Name

Family Name *

1. If Fast Doc criteria is met, a conditional approval will be provided within seconds
2. If at anytime your application falls outside of Fast Doc criteria, you will be prompted to continue as Full Doc and all completed information will carry forward.


➤ Reviewing Application Status & Quotes

The screenshot displays the ScotPac dashboard interface. At the top left, the 'Recent applications' section is highlighted with a red border. It shows a card for an application submitted on 09 Aug 2021 with a value of \$0 and a green 'Approved' status. Below this is a 'View All' button. To the right of this section is a 'Tools' area with four cards: 'Quick Quote' (with a document icon), 'Quick Submission' (with a document and pencil icon), 'Coming Soon' (with a clock icon and text 'Create Campaigns Coming Soon We'll keep you up to date'), and 'Product Selector' (with a magnifying glass icon). Below the 'Recent applications' section is the 'Recent quotes' section, also highlighted with a red border. It shows a card for a quote from 'Test' on 29 Oct 2021 with a value of \$100k and a yellow 'Quote' status. Below this is a 'View All' button. To the right of this is the 'Pending applications' section, highlighted with a red border. It shows a card for an application on 29 Oct 2021 with a value of \$0 and a grey 'Incomplete' status. Below this is a 'View All' button.

1. Once you submit an application, it will appear as submitted in the 'Pending applications' section
2. Once it's being reviewed by the credit team, you can track status in the 'Recent application' section. You can also find any previously submitted and settled deals in this listing
3. Saved Asset Finance Quotes can be found in the 'Recent quotes' section

➤ Referring Clients to ScotPac (non Asset Finance)

Refer your client



Client Details

First Name	What challenge or opportunity is your client looking to solve?
Last Name	Start typing
Company Name	
Email Address	
+61	
Industry	Submit

1. Complete details for clients suitable for a ScotPac solution
2. A Working Capital Specialist will call you to discuss the best options for your client
3. This will be the Business Development Manager you've previously dealt with at ScotPac for non-asset finance products (if applicable)

Working Capital Calculator

Working Capital Calculator

Find out how much working capital your client needs

Toggle between current and anticipated cashflows

Got it

Business Position

● Current ● Anticipated

The following information can be obtained from your client's balance sheet

Accounts Receivable	\$
Inventory	\$
Accounts Payable	\$
Tax and superannuation in arrears	\$

The following information can be obtained from your client's profit and loss statement

Sales revenue	\$
Cost of goods sold (COGS)	\$
Total expenses	\$

Your client's working capital needs

Your client's working capital shortfall is:

Current: \$XXX

Anticipated: -

This is the capital your client is required to have on hand to cover their day-to-day trading, operating expenses, tax & superannuation in arrears.

Your client could borrow up to:

Current: \$XXX

Anticipated: -

with a ScotPac Invoice Finance facility. Plus get access to our Trade and Asset Finance solutions to increase your client's borrowing power.

Refer your client for a more detailed review of your client's business needs

Refer a client

1. The working capital calculator allows you to calculate your client's working capital shortfall
2. Enter in details from your client's balance sheet and P&L
3. Use the 'Anticipated' toggle to forecast their working capital shortfall
4. Find out how much they could borrow with an invoice finance facility, plus access more funding via other solutions (asset + trade)

➤ Product Selector Tool

Product Selector

Q1

What is your client's current business position?

☐ Start Up Pre-Trading

☐ Trading but not yet profitable

☐ Growing - profitable or projected profits

☐ Established, stable business

☐ Established business with stressed requirements

Back Next

1. This tool was created based on the [Business Funding Guide](#), a collaboration between the Australian Small Business and Family Enterprise Ombudsman (ASBFEO), lenders, aggregators and other key financial service providers in the industry.
2. Complete four questions to determine product options suitable for your client needs.
3. Get a summary of advantages, considerations and suitability across production options

Q1: What is your client's current business position?

Q2: Why is your client seeking finance?

Q3: Is your client acquiring additional assets?

OR

Does your client have assets as security to reduce costs and increase borrowing power?

Q4: Select the assets your client could use for security

> Lead Generation Marketing

Free access to a comprehensive marketing platform. A library of relevant and regularly updated content. Send to clients & prospects in your own branding

Campaigns

Newsletters

Sales Emails

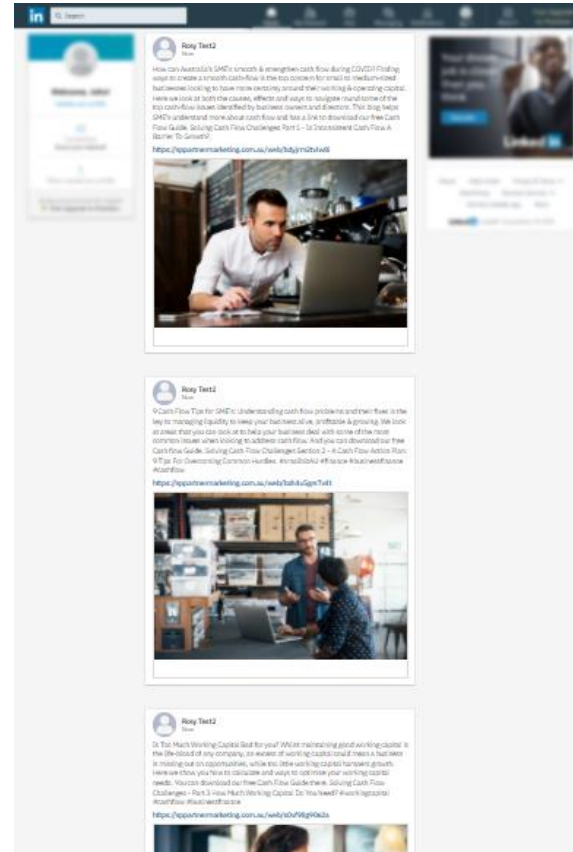
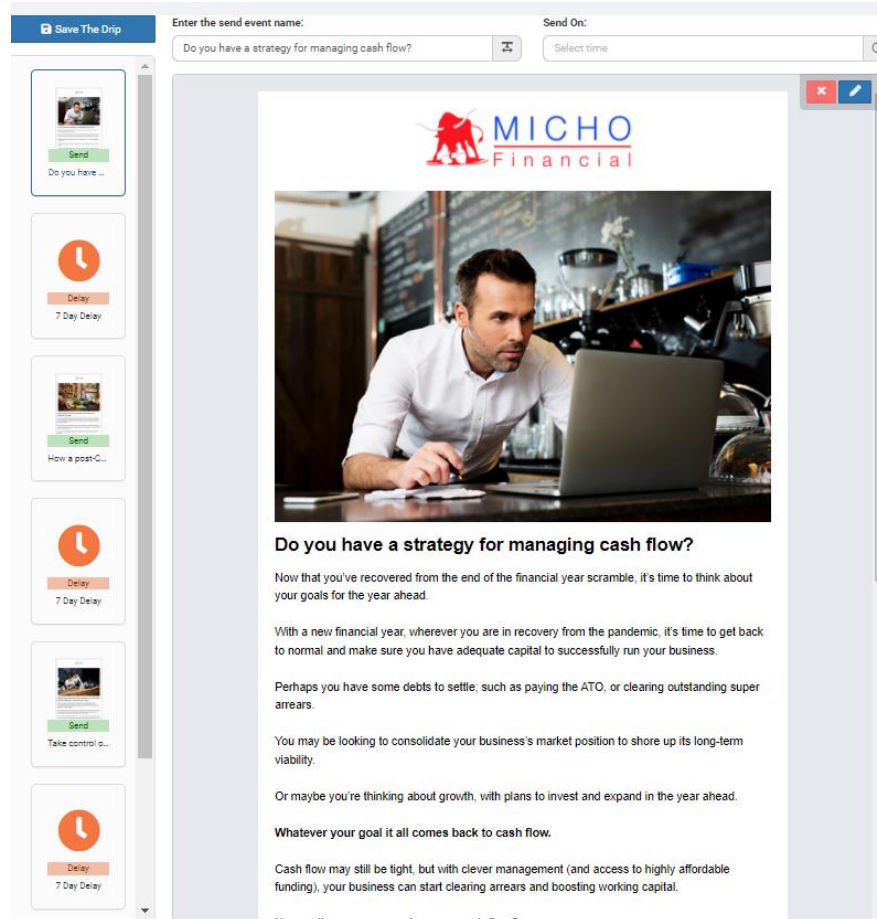
Social Campaigns &
Blogs

Product Summaries
& Resources

Marketing
Performance
Reporting

- More details on the following slides

Campaigns



1. Marketing campaigns allow you to generate leads by automating the send of 4 pre-written emails and 4 social posts targeted to your clients/prospects, all branded by you
2. Complete the 3 steps to activate the full campaign; you have the choice to modify the campaign content and timing
3. See the 'Campaign' video for a video demonstration or the 'Marketing FAQ's for a step by step guide

> Newsletters



How to Create a Cash Flow Forecast

Cash flow is one of the most critical factors in the success of any business. Forecasting your cash flow enables you to take steps to ensure you have enough liquidity to capitalise on opportunities and grow your business.

[Read More](#)

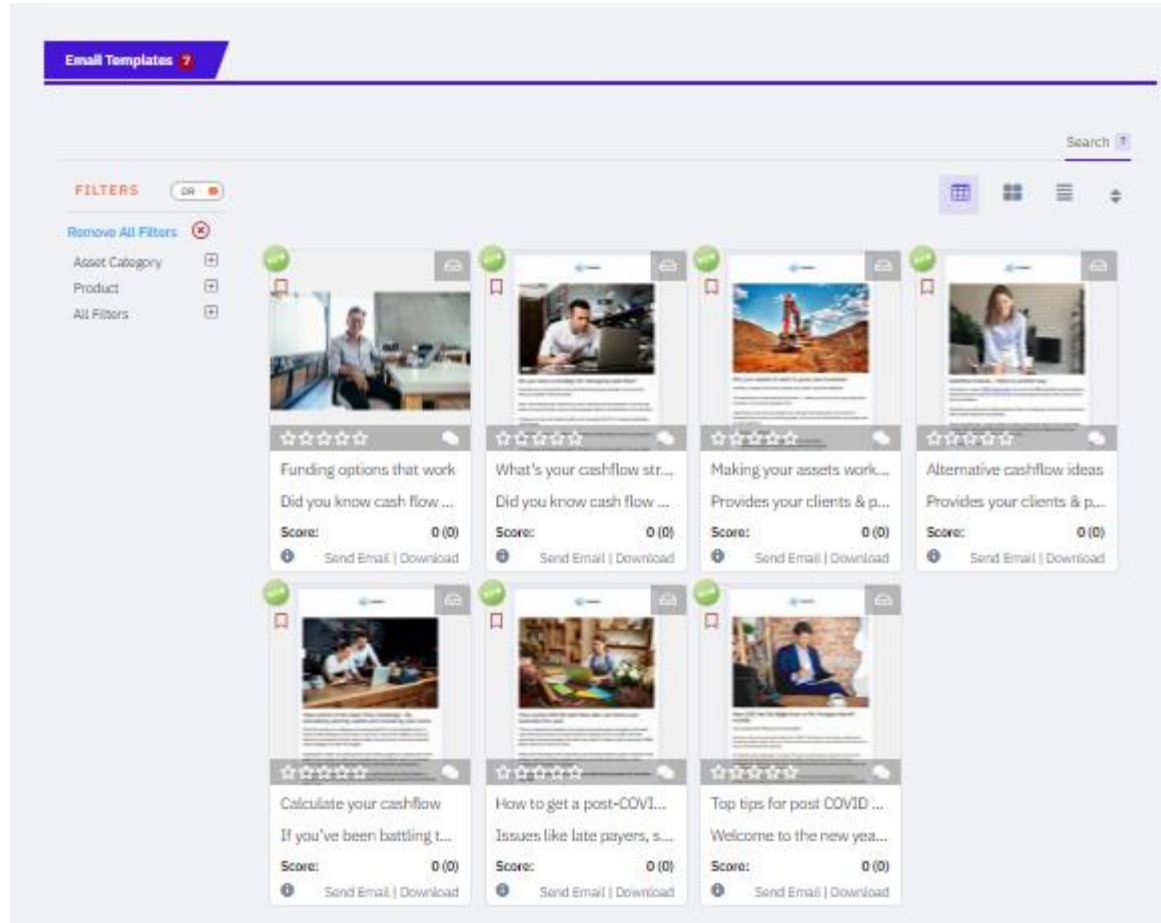
Article Selection

Select articles to populate into the newsletter (best practice is 4-6 articles)

- ☐ Managing your Money
- ☐ Finance and Business News
- ☐ Running a Business
- ☐ Finances Solution

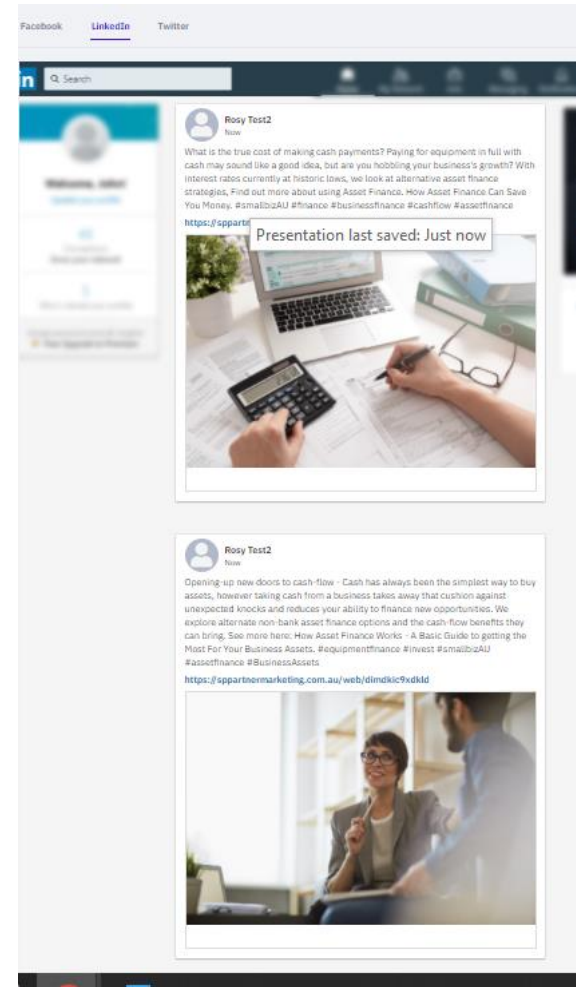
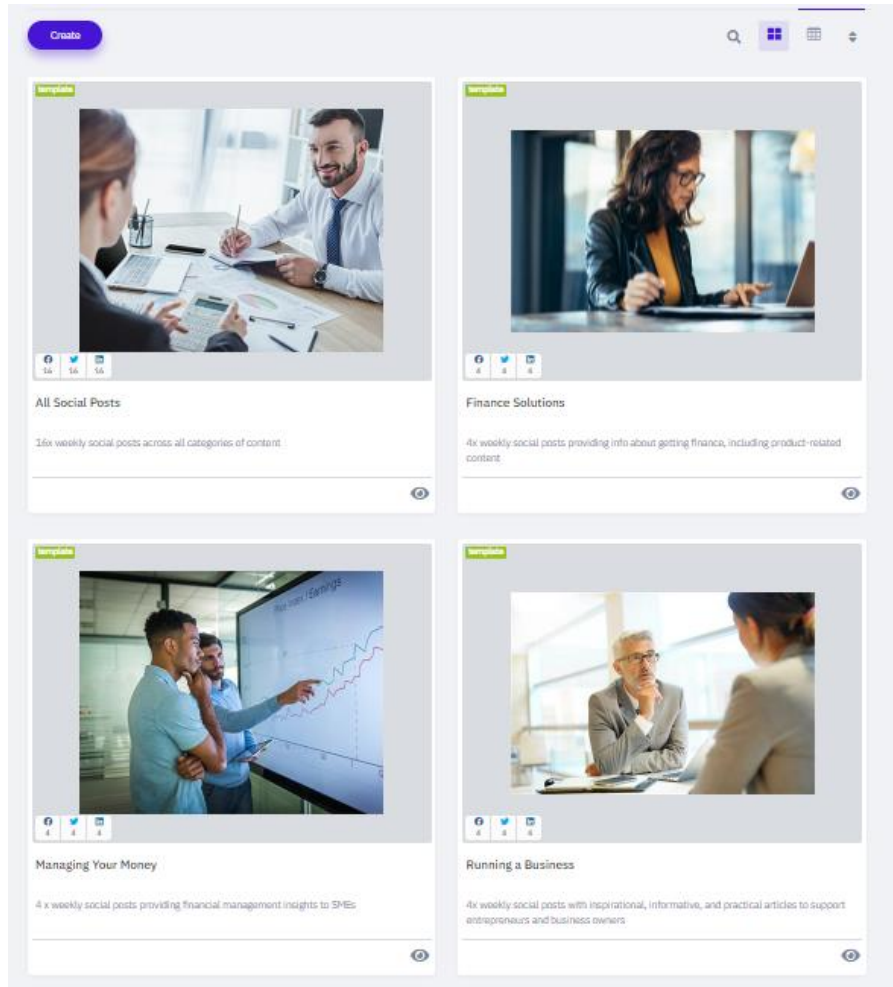
1. Newsletters allow you to send current business & finance news articles to your prospects and clients, with your branding
2. Each month, we'll provide fresh new content written by credible and experienced finance journalists across a wide range of topics as shown in the screenshot
3. We suggest you use the Article Selection Wizard to send 4-5 articles best-suited for your contacts
4. See the ['Newsletter & Sales Email Video'](#) for a video demonstration or the ['Marketing FAQ's'](#) for a step by step guide

➤ Sales Emails



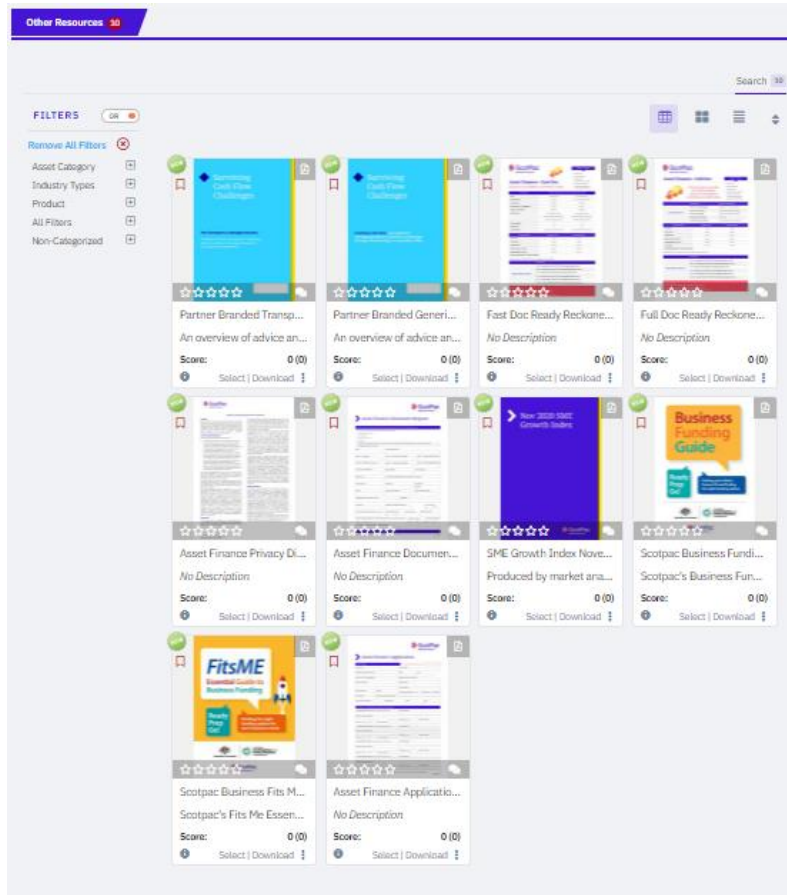
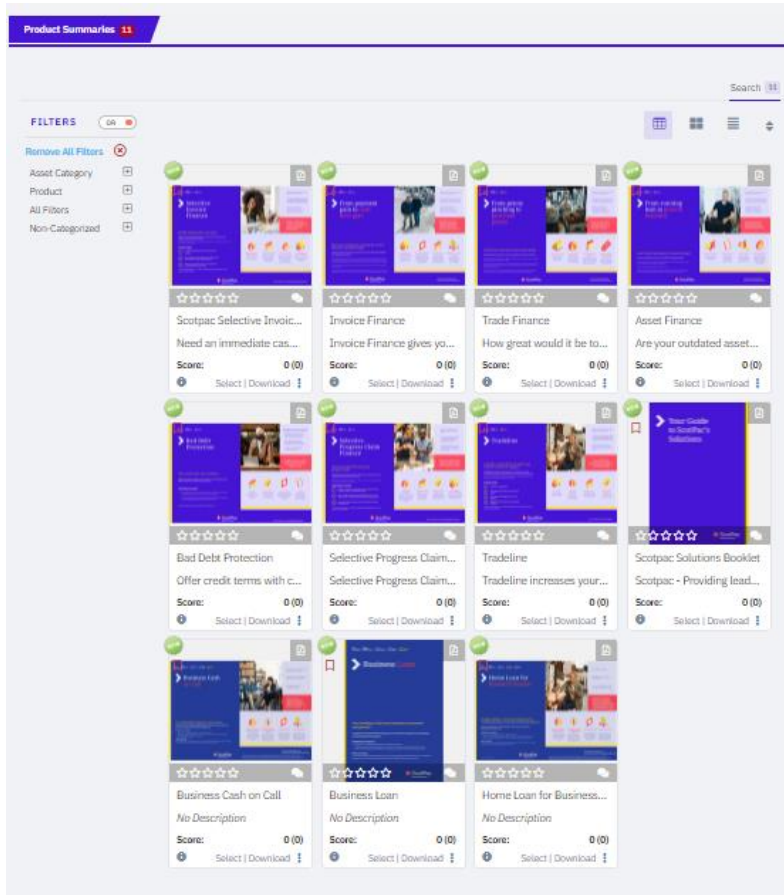
1. You have access to a library of Sales Emails which you can send one-off or to a bulk contact list
2. The emails will be branded with your company and personal profile details
3. See the '[Newsletter & Sales Email ' Video](#) for a video demonstration or the '[Marketing FAQ's](#) for a step by step guide

➤ Social Campaigns & Blogs



1. Social Campaigns & Blogs allow you to share curated social media campaigns and blog content with your network
2. There is a minimum of 16 weeks worth of content available which will be updated regularly (at least quarterly)
3. See the 'Social Campaigns & Blog' Video for a demonstration or the 'Marketing FAQ's for a step by step guide

Product Summaries & Sales Resources



1. You'll have access to all of ScotPac's Product Summaries & Sales Resources
2. This includes cash flow guides & forecast template, application forms, privacy consent form plus more

> Reporting

Reporting ▾

Newsletter & Emails Report >

Campaigns Report >

Social Campaigns & Blogs Report >

Landing Pages Report >

Sales Resources Report >

Contacts Report >

Email Summary Report

Users

All

Collective

Generate

Stats and Activity

	Monday*	Tuesday*	Wednesday*	Thursday*	Friday*	Saturday*	Sunday*
Best time for Sending	-	-	10am - 11am (1/ 1)	-	8am - 9am (2/ 2)	-	-

EMAILS SENT

EMAILS OPENED

LINKS CLICKED

Delivery Ratios

EMAILS DELIVERED

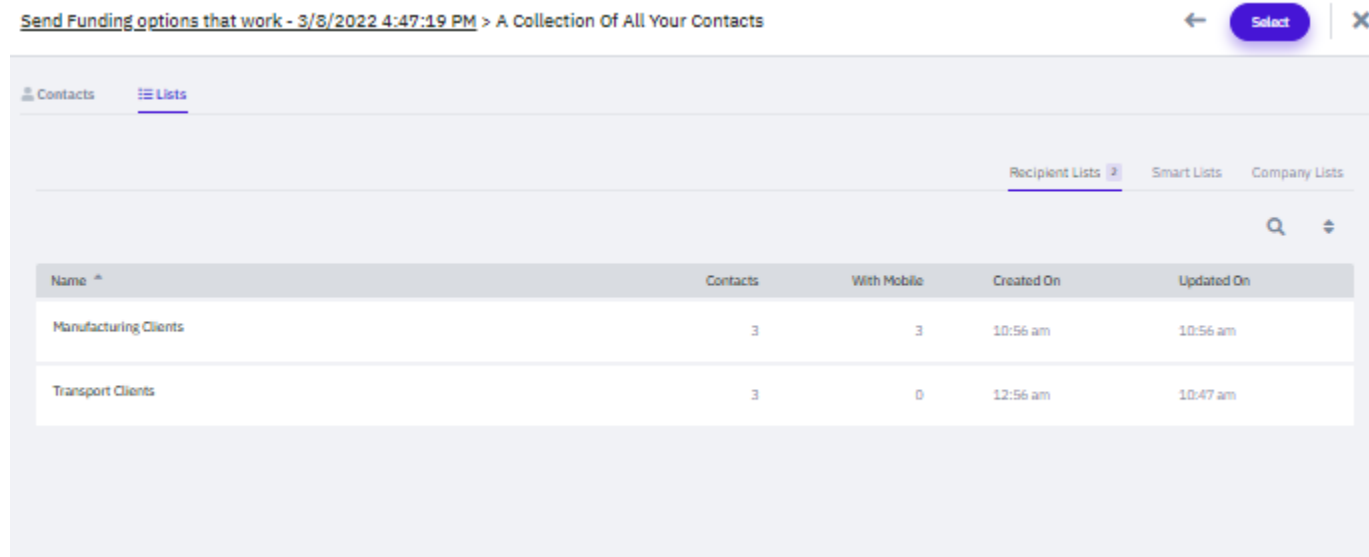
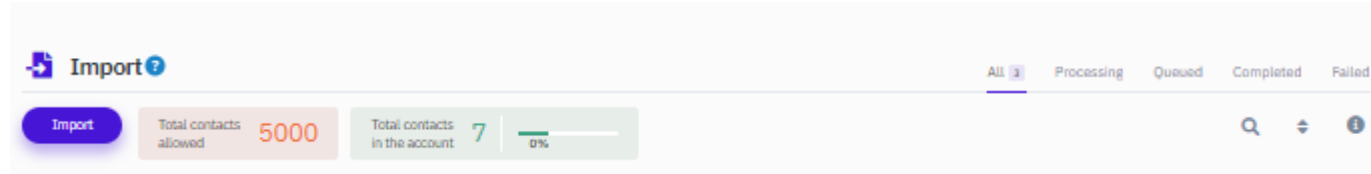
EMAILS BOUNCED

Sent Emails

Subject	Template	User	Company	Total Sent	Opened	Unique Clicked	Total Clicked	Delivered	Bounced	Unsubscribed	Sent On
Generic Guide	Partner Branded Generic Cash F	rosyp@scotpac.com.au	The trustee for the Tierra Trust	1	1(100%)	1	1	1	0(0)	0	4/03/2022
Transport Guide	Partner Branded Transport Cas	rosyp@scotpac.com.au	The trustee for the Tierra Trust	1	1(100%)	1	1	1	0(0)	0	4/03/2022
Your Business & Finance...	Newsletter Template	rosyp@scotpac.com.au	The trustee for the Tierra Trust	1	1(100%)	3	4	1	0(0)	0	2/02/2022

1. Access reporting across all the marketing capabilities
2. You'll be able to see consolidated stats and activity plus delivery ratios across all emails as well as results for individual emails sent
3. You can also access the consolidated list of unsubscribes and hard bounces in the Contacts Report

➤ Setup Email Lists



1. Setup your email lists in order to send Newsletters, emails and campaigns to your contacts
2. Your data is secured and cannot be accessed by ScotPac so your contacts will stay private to you
3. Segment your contacts by naming your lists – this can help you choose what communications you send to which list
4. See the [‘Getting Started’ video](#) for a video demonstration or the [‘Marketing FAQ’s](#) for a step by step guide

Marketing FAQs


Partner Portal FAQs

Contacts

HOW DO I UPLOAD MY CONTACTS? 

HOW CAN I SEE WHICH CONTACTS HAVE UNSUBSCRIBED? 

Emails

WHAT IS A NEWSLETTER AND HOW DO I SEND A NEWSLETTER TO MY CLIENTS? 

HOW DO I SEND A ONE-OFF EMAIL? 

HOW DO I VIEW OR EMAIL A PRODUCT SUMMARY OR OTHER RESOURCES? 

1. Access the FAQ's at <https://www.scotpac.com.au/partner-portal-faq/> for step-by-step information to get your communications setup

> Thank You



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Scottish Pacific Business Finance



Scottish Pacific

[youtube.com/channel/Scottish pacific business finance](https://youtube.com/channel/Scottish%20pacific%20business%20finance)