Partner Portal
Broker Onboarding

May 2022

ScotPac

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

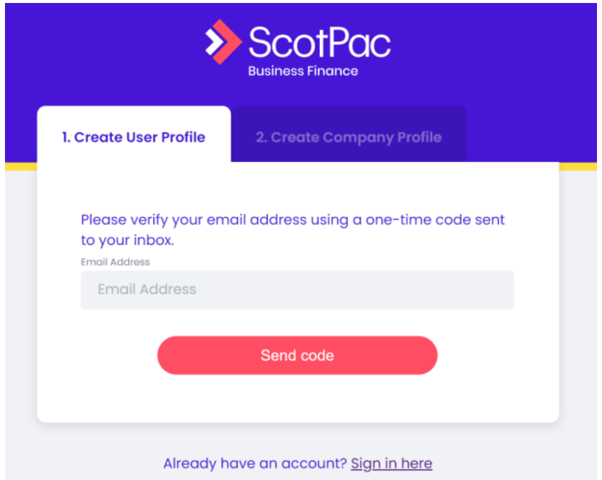
Apply & Refer
Track status, Apply (AF FastDoc/FullDoc), Refer (DF & Trade)

Commission & Income Tracking*
Statements, performance benchmarking

Client & Partner Analytics*
Client next best action/cross-sell

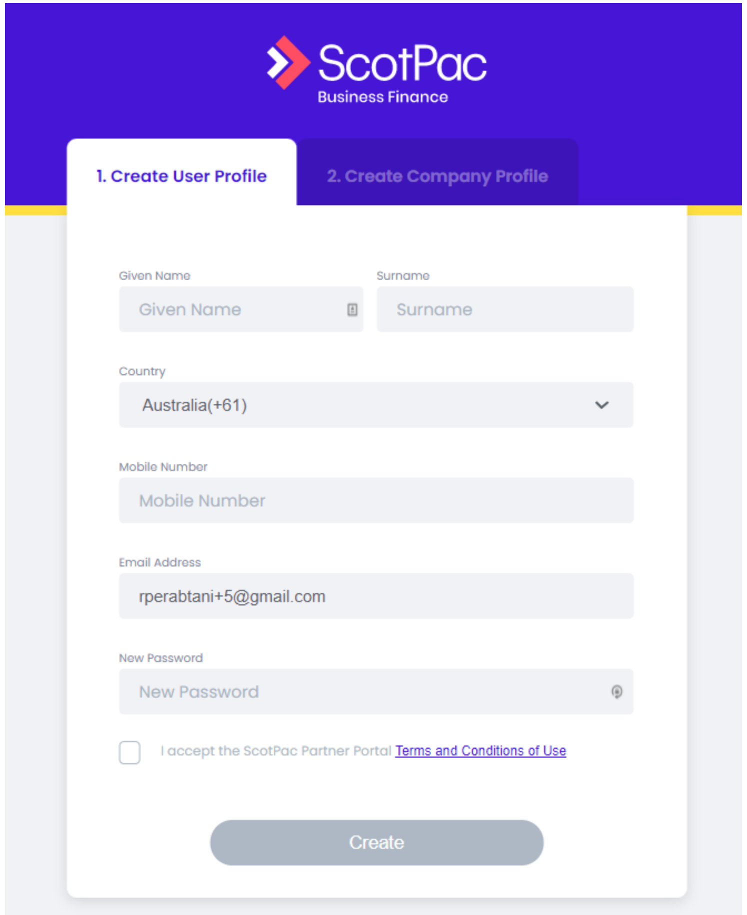
* Coming soon

Logging In

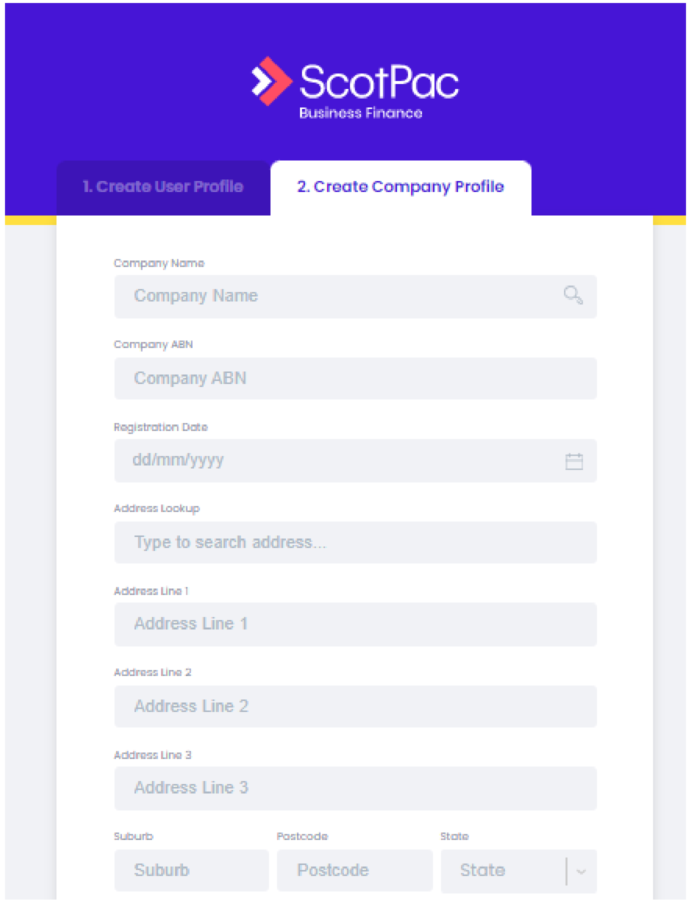


- This step is skipped if the Broker has been Invited to the Portal

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



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



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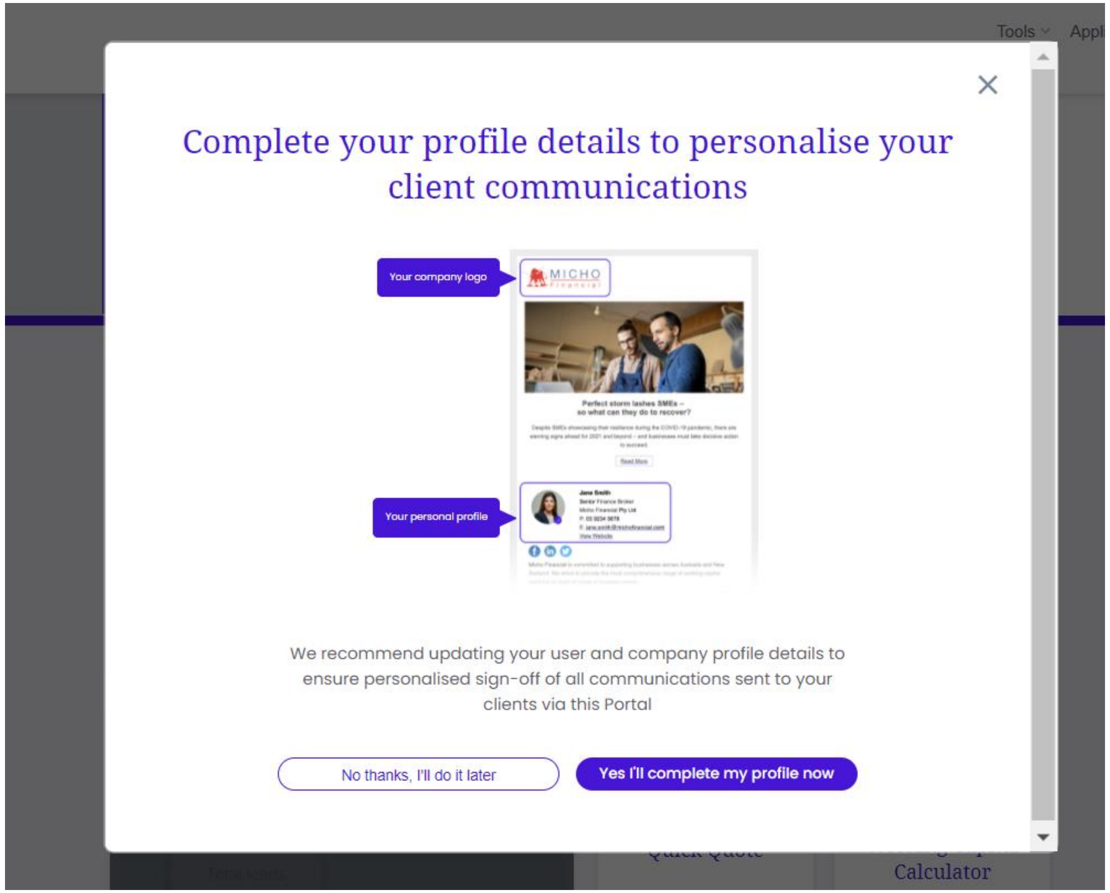
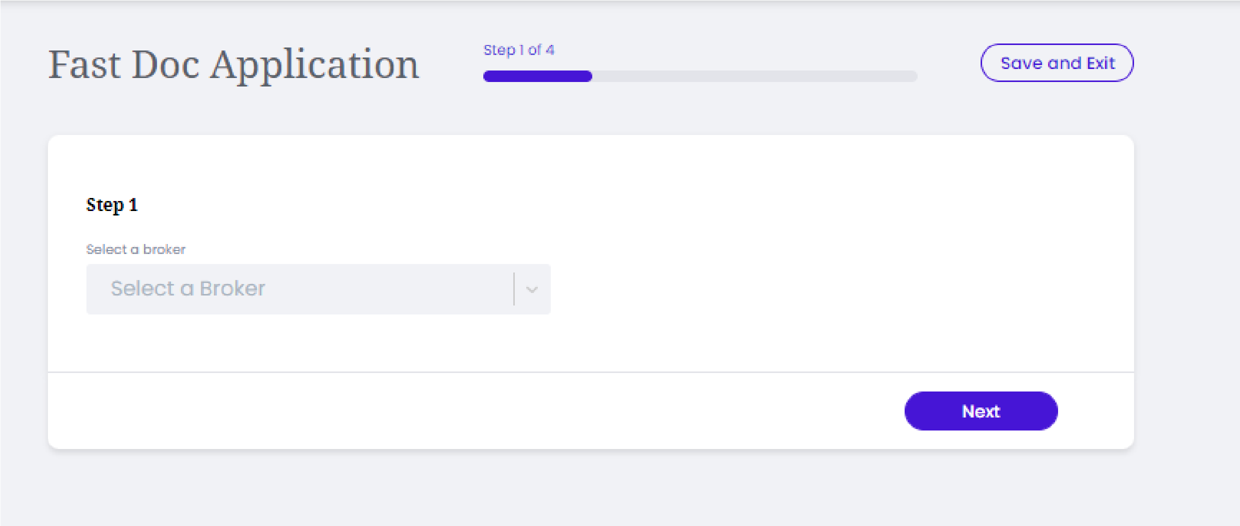
Setting up your Profile



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

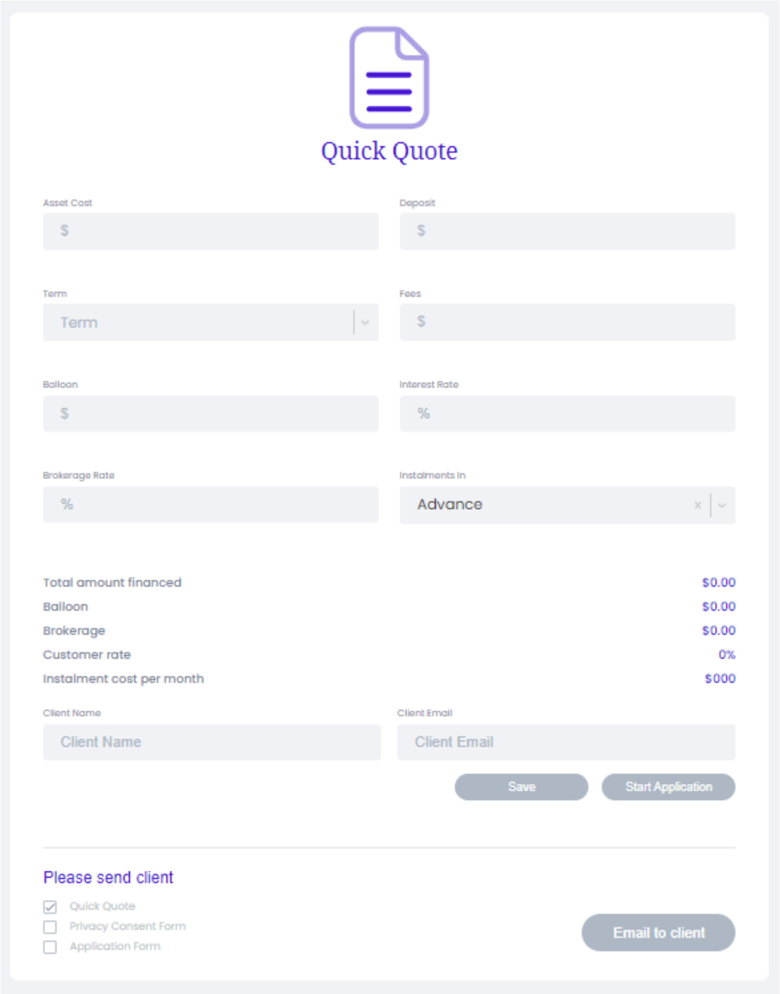
The Company / Admin Role

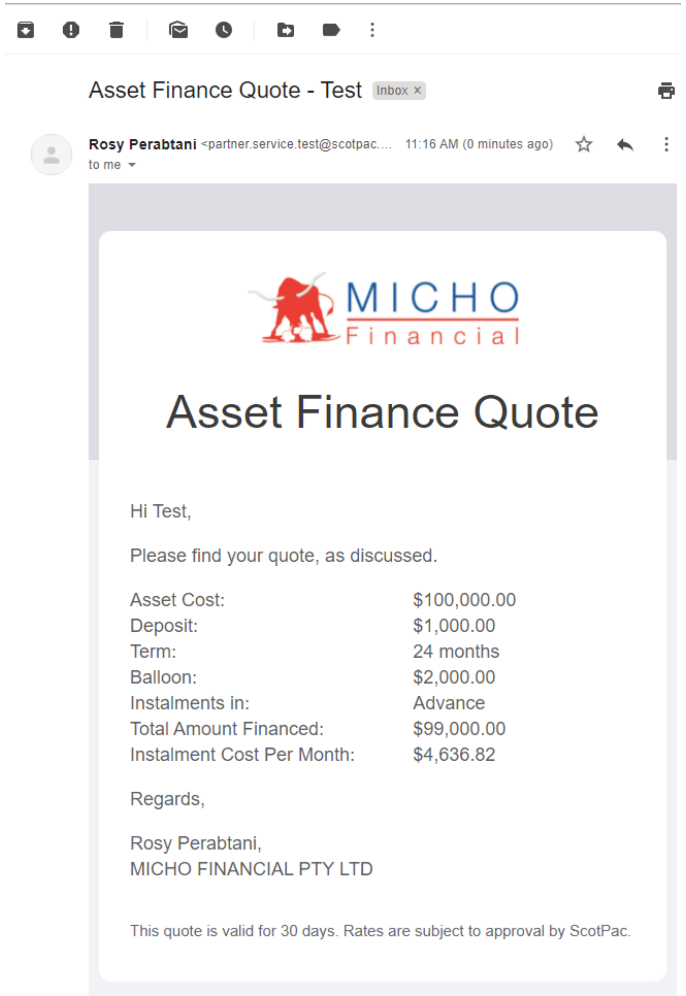


1. Users assigned the 'Company' or Admin role will allow staff members in your organisation to submit applications on behalf of brokers

2. Applications submitted by these individuals will appear in both the Company and applicable Broker user's dashboard

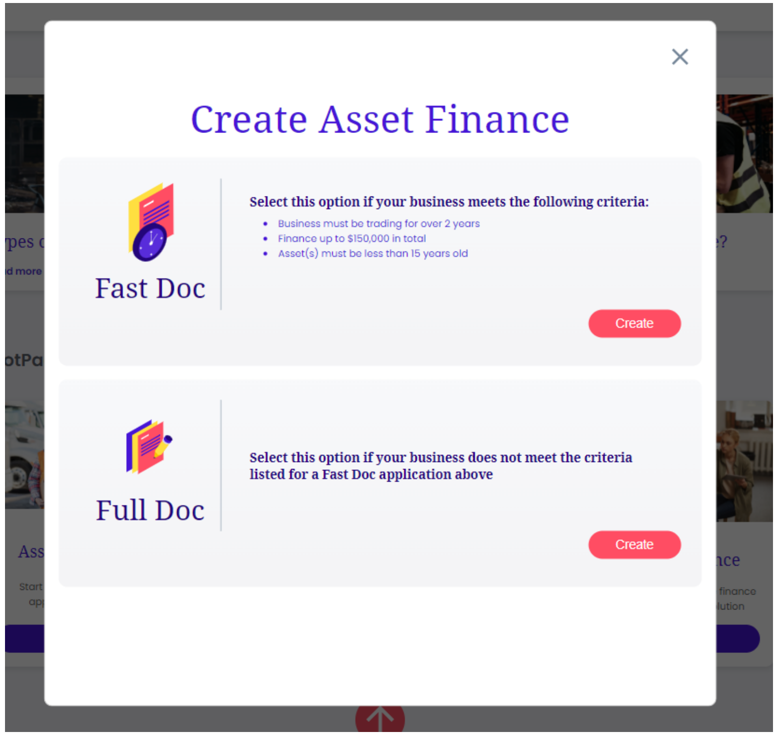
Asset Finance Quick Quote

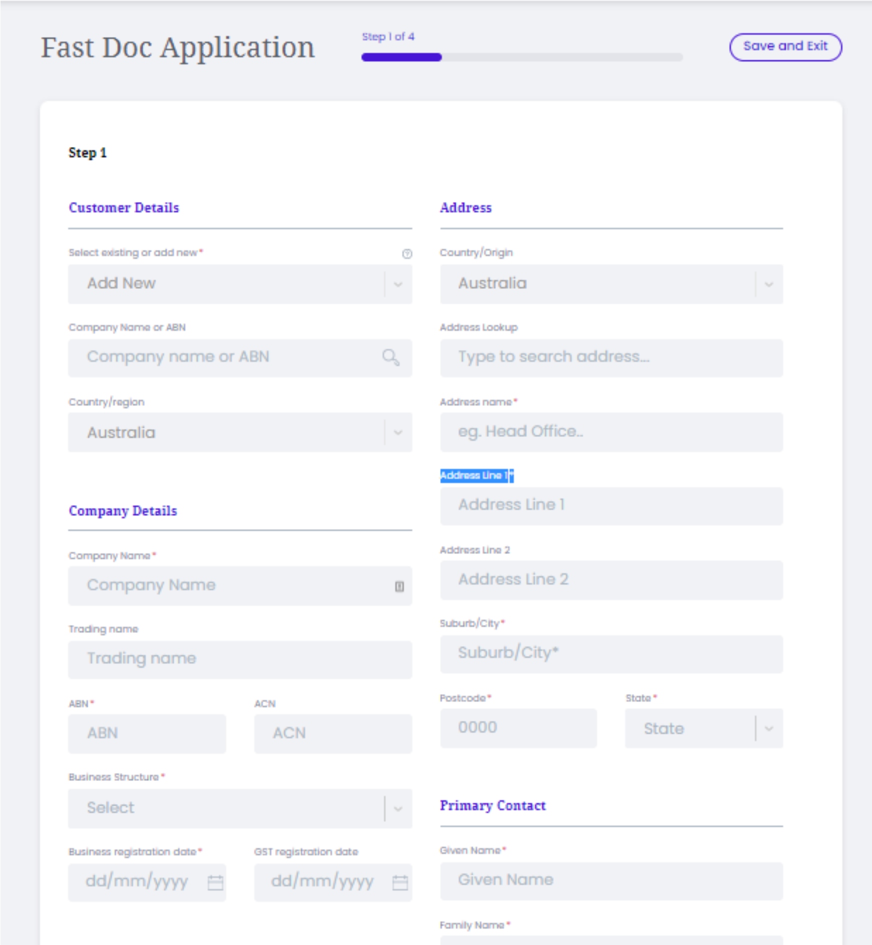




1. Create / Save Quotes
2. Send Quotes to your Client branded by you
3. Start an Asset Finance application from the Quote
4. Access Saved Quotes – edit / send to client / start an application from quote at a later date

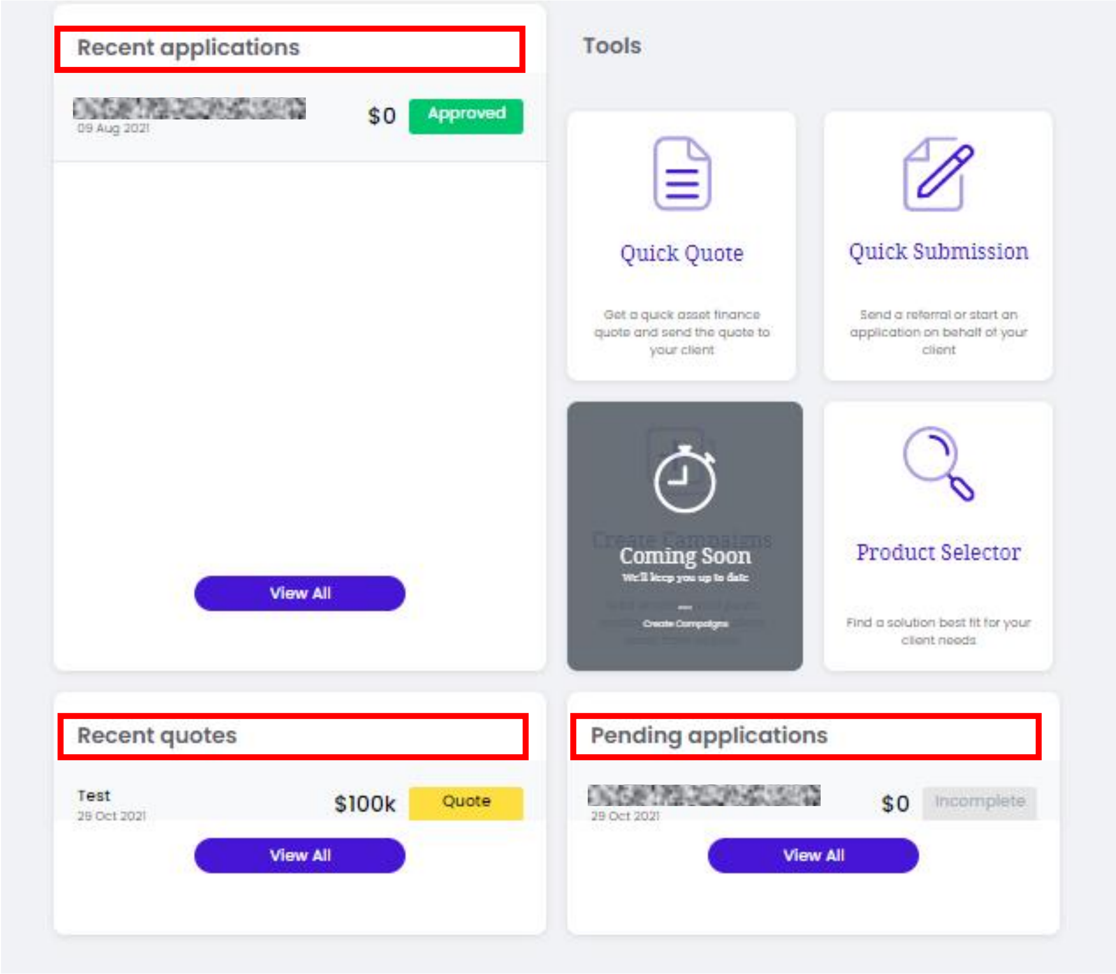
Applying for Asset Finance





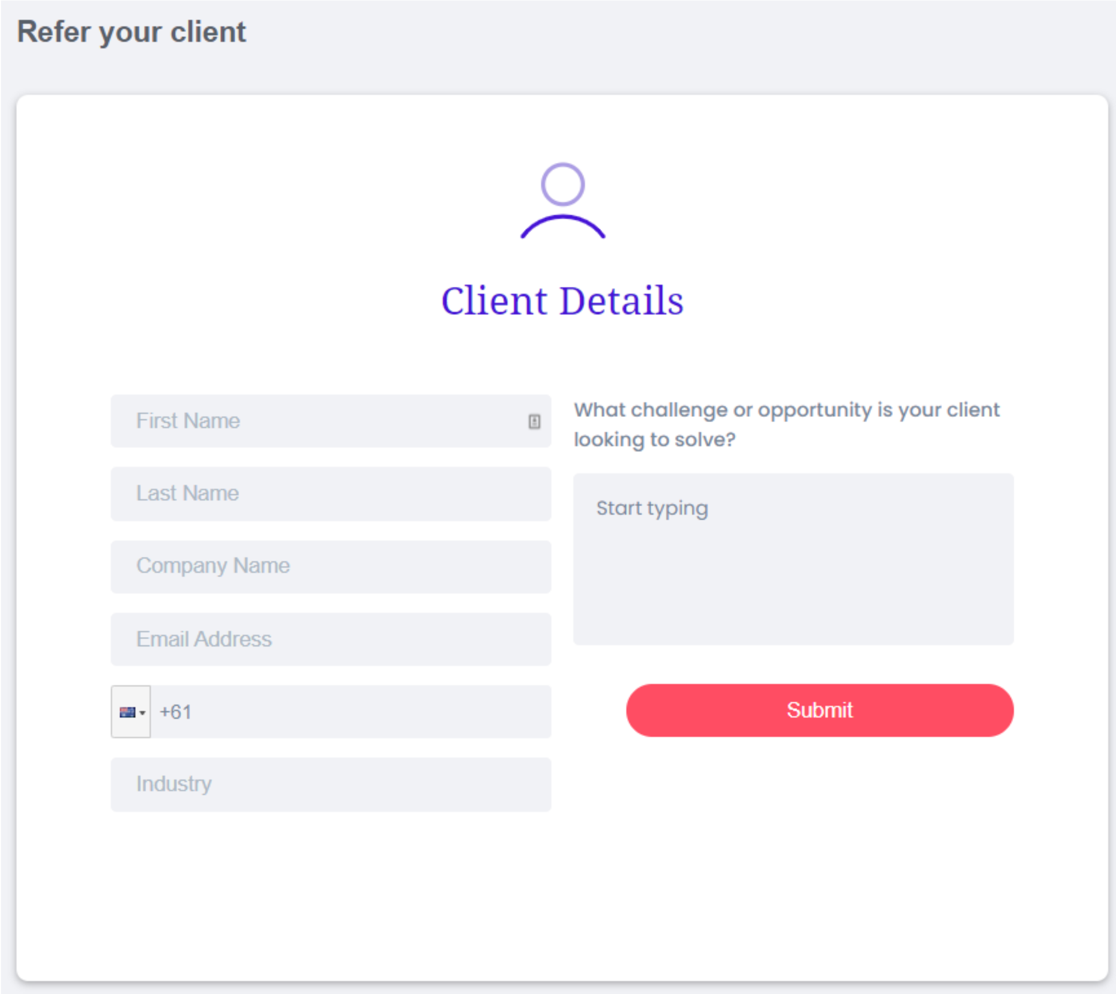
1. If Fast Doc criteria is met, a conditional approval will be provided within seconds
2. If at anytime your application falls outside of Fast Doc criteria, you will be prompted to continue as Full Doc and all completed information will carry forward.

Reviewing Application Status & Quotes



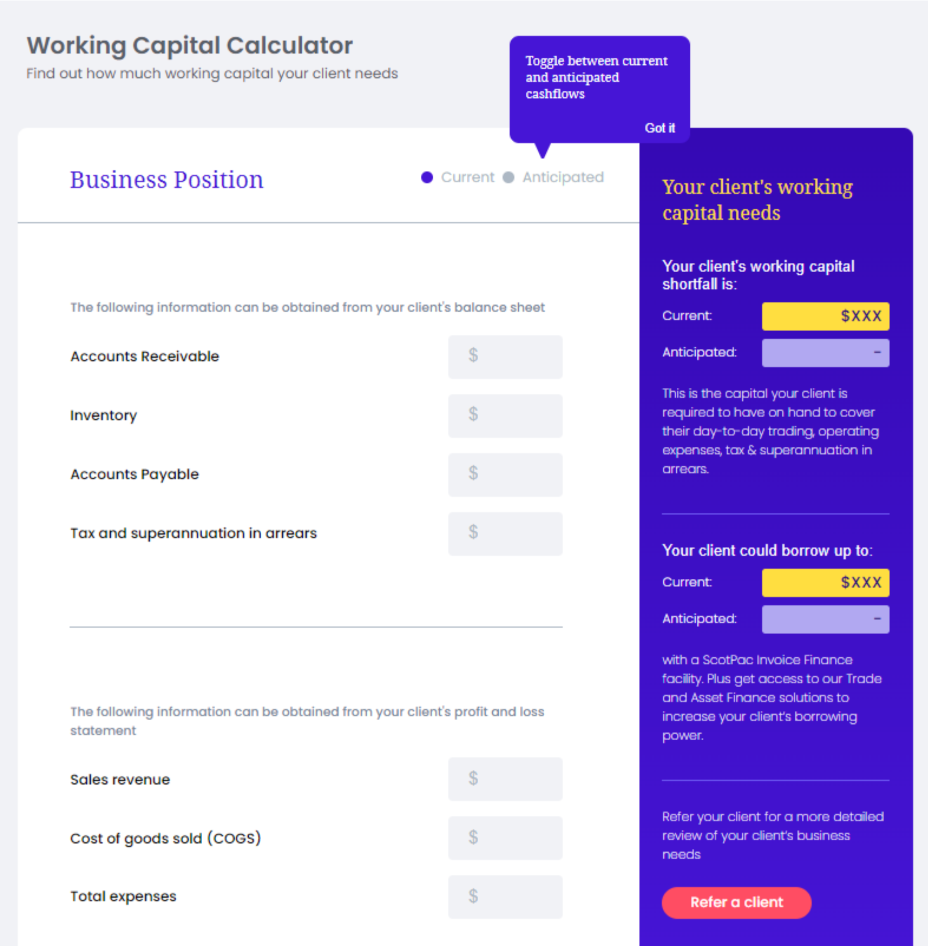
1. Once you submit an application, it will appear as submitted in the ‘Pending applications’ section
2. Once it’s being reviewed by the credit team, you can track status in the ‘Recent application’ section. You can also find any previously submitted and settled deals in this listing
3. Saved Asset Finance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

Referring Clients to ScotPac (non Asset Finance)



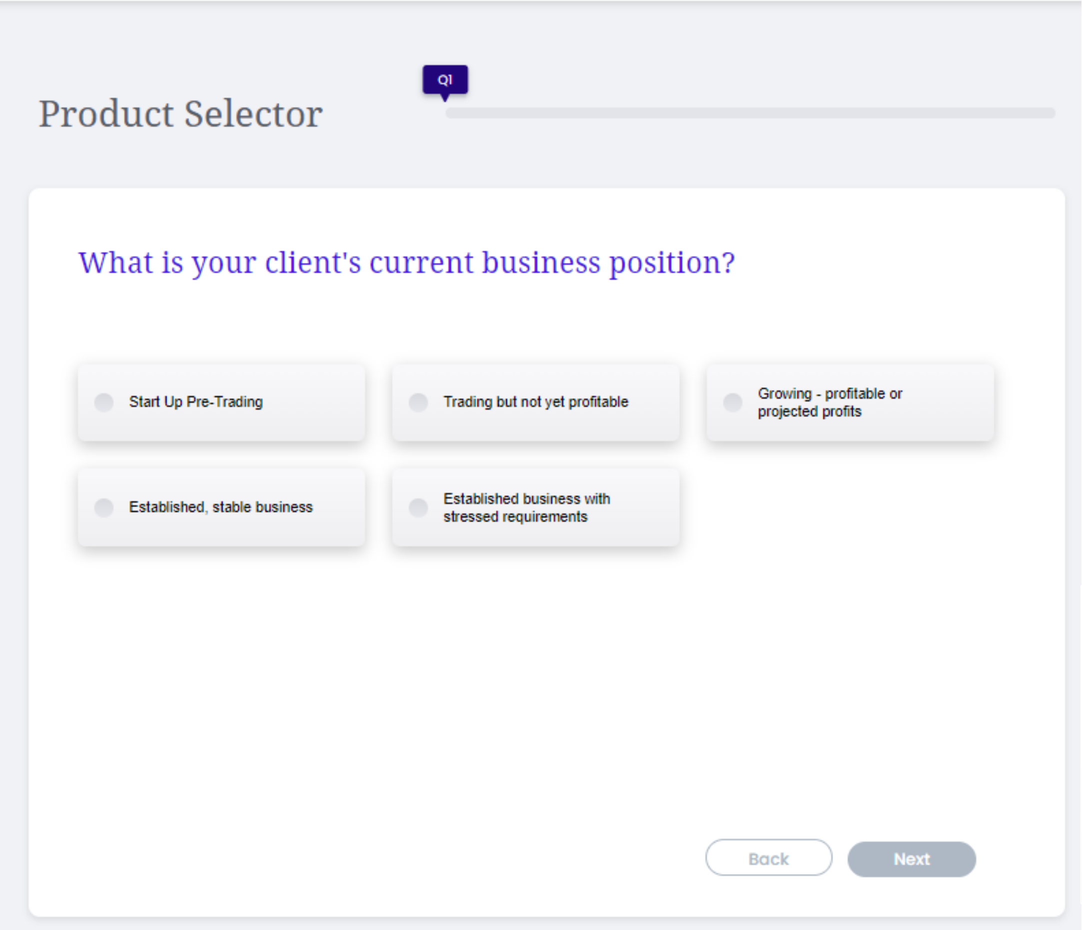
1. Complete details for clients suitable for a ScotPac solution
2. A Working Capital Specialist will call you to discuss the best options for your client
3. This will be the Business Development Manager you've previously dealt with at ScotPac for non-asset finance products (if applicable)

Working Capital Calculator



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



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

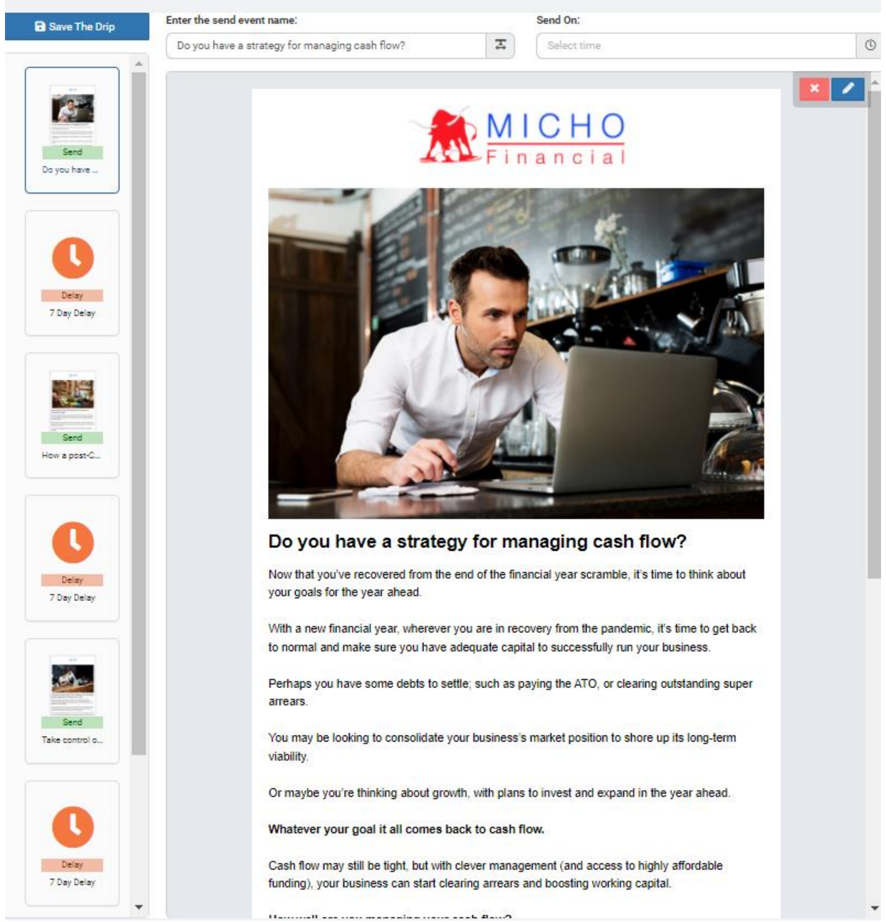
Lead Generation Marketing

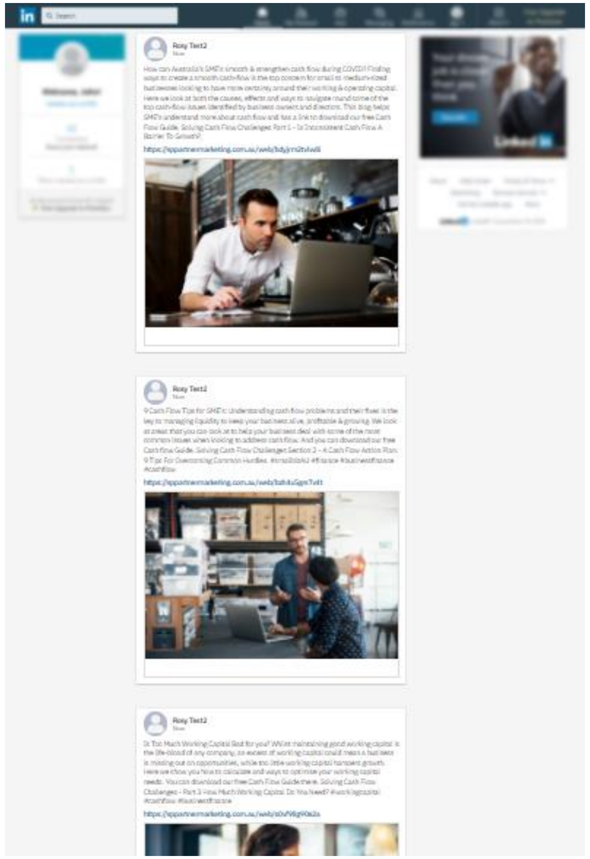
Free access to a comprehensive marketing platform. A library of relevant and regularly updated content. Send to clients & prospects in your own branding

Campaigns	Newsletters	Sales Emails
Social Campaigns & Blogs	Product Summaries & Resources	Marketing Performance Reporting

- More details on the following slides

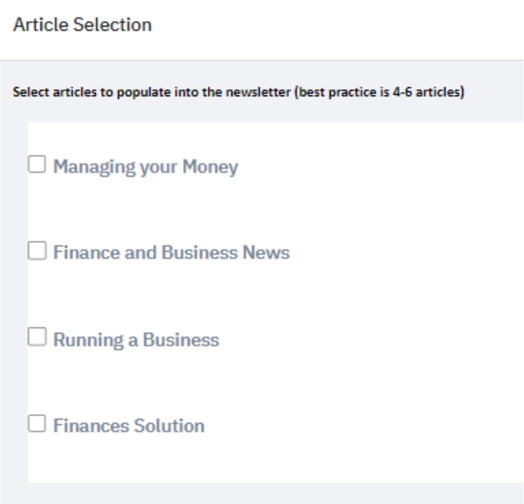
Campaigns





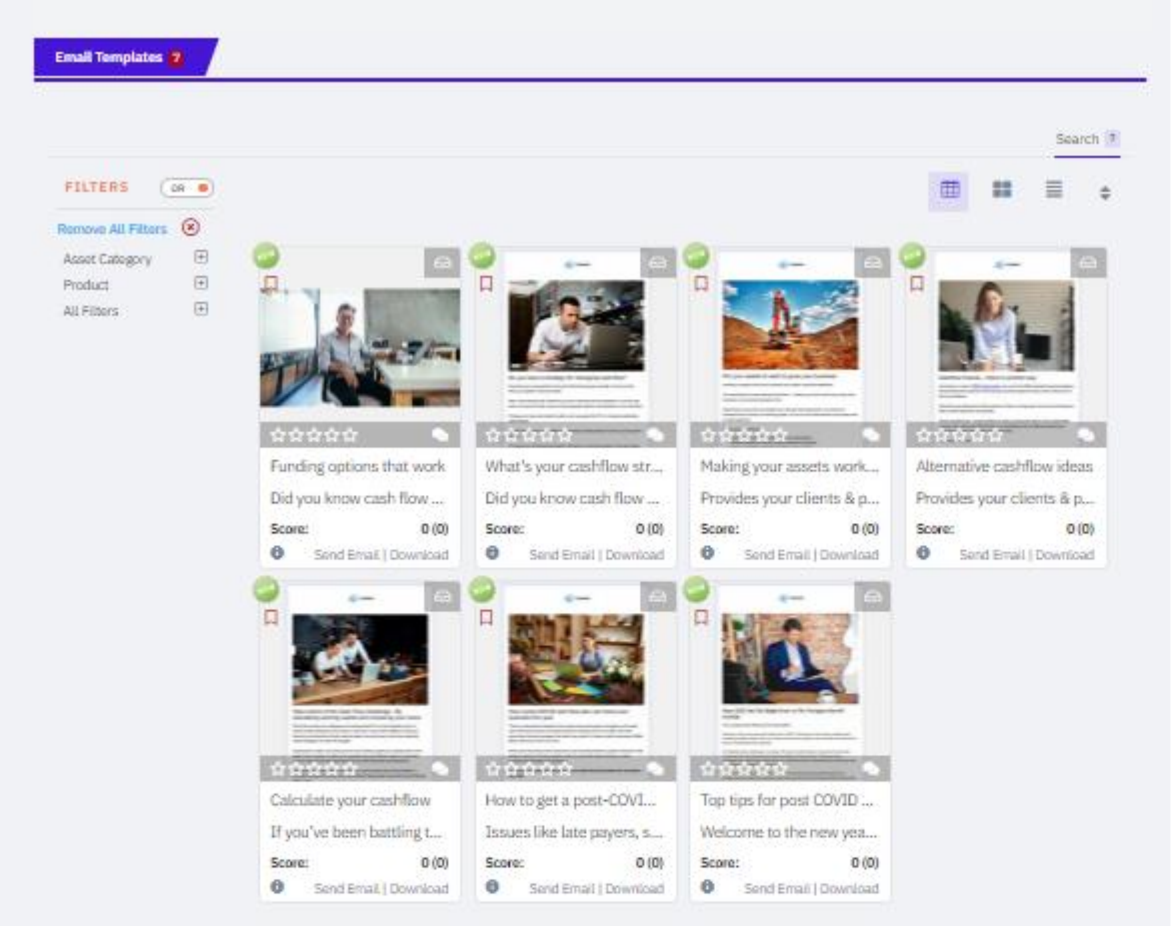
1. Marketing campaigns allow you to generate leads by automating the send of 4 pre-written emails and 4 social posts targeted to your clients/prospects, all branded by you
2. Complete the 3 steps to activate the full campaign; you have the choice to modify the campaign content and timing
3. See the ‘Campaign’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

Newsletters



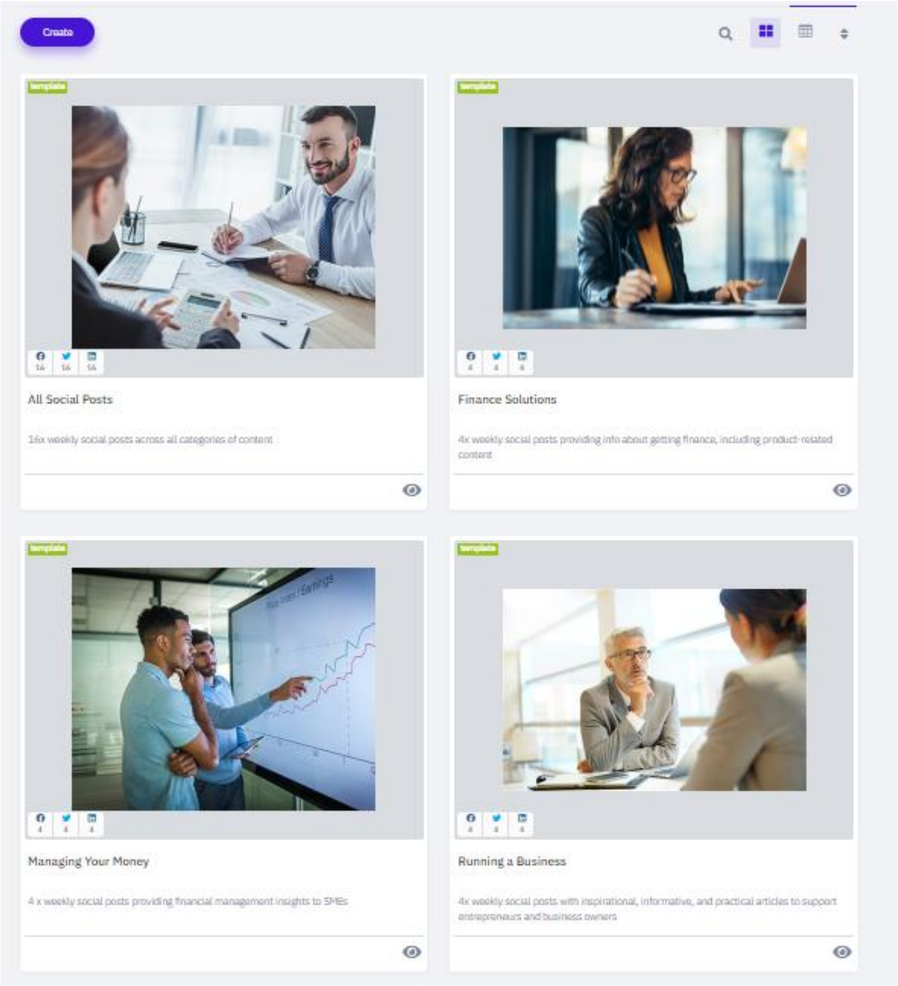
1. Newsletters allow you to send current business & finance news articles to your prospects and clients, with your branding
2. Each month, we'll provide fresh new content written by credible and experienced finance journalists across a wide range of topics as shown in the screenshot
3. We suggest you 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

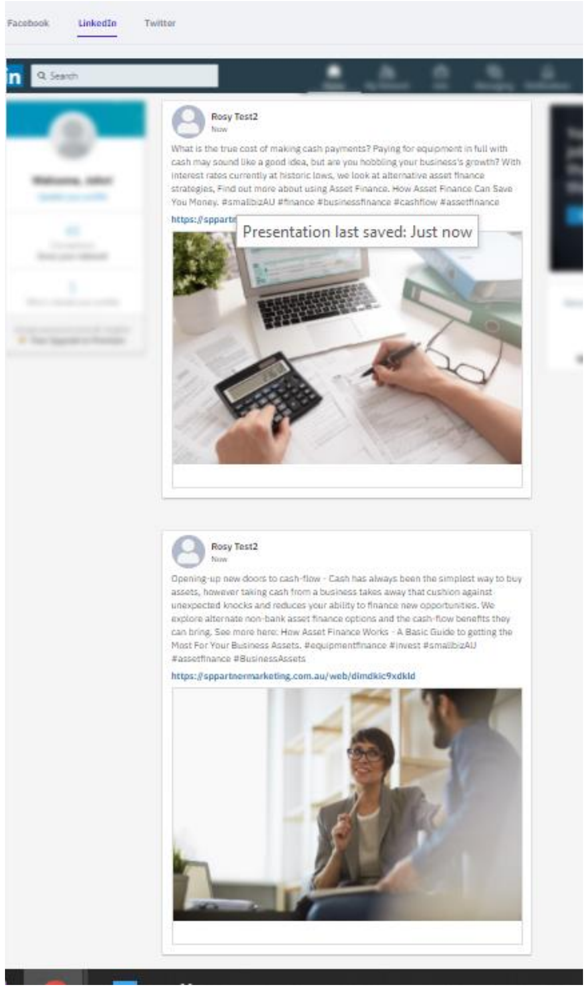
Sales Emails



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

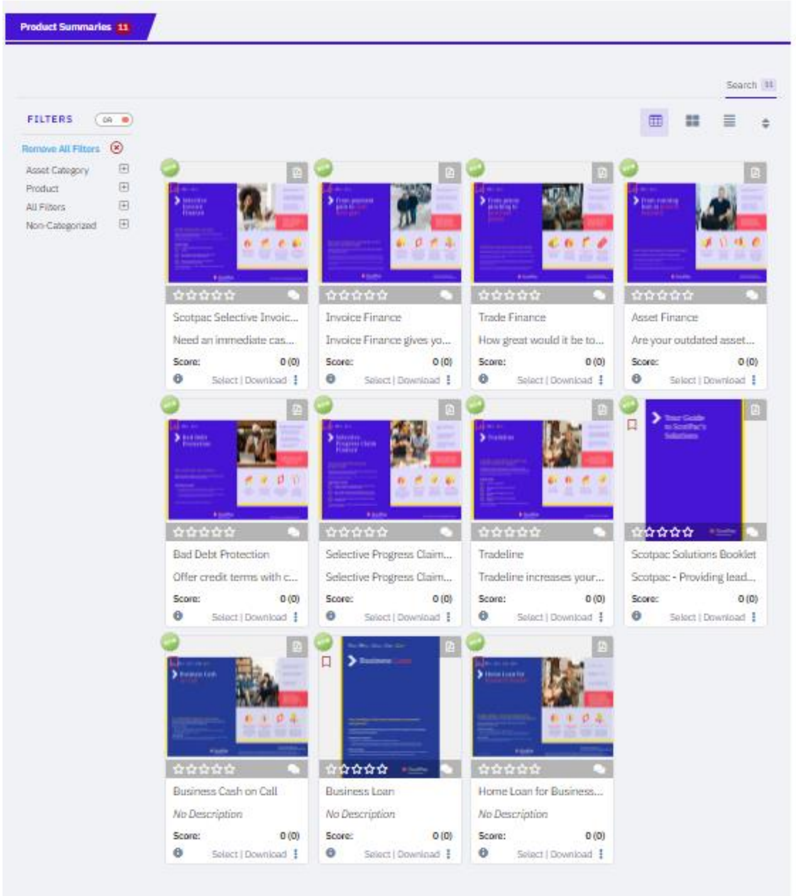
Social Campaigns & Blogs

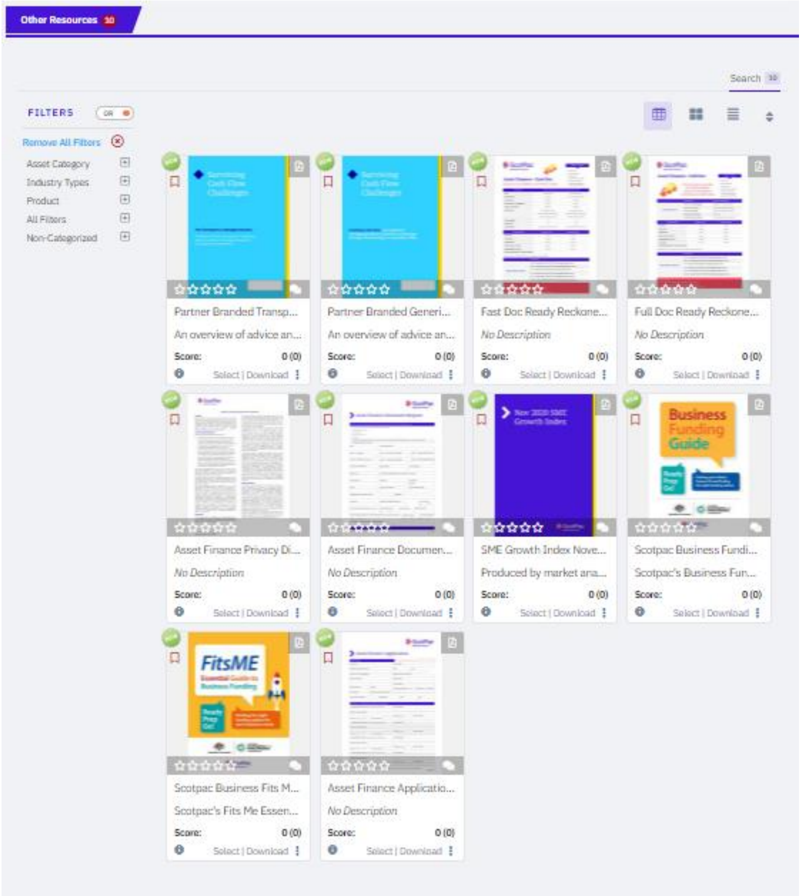




1. Social Campaigns & Blogs allow you to share curated social media campaigns and blog content with your network
2. There is a minimum of 16 weeks worth of content available which will be updated regularly (at least quarterly)
3. See the ‘Social Campaigns & Blog ‘ Video for a demonstration or the ‘Marketing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

Product Summaries & Sales Resources



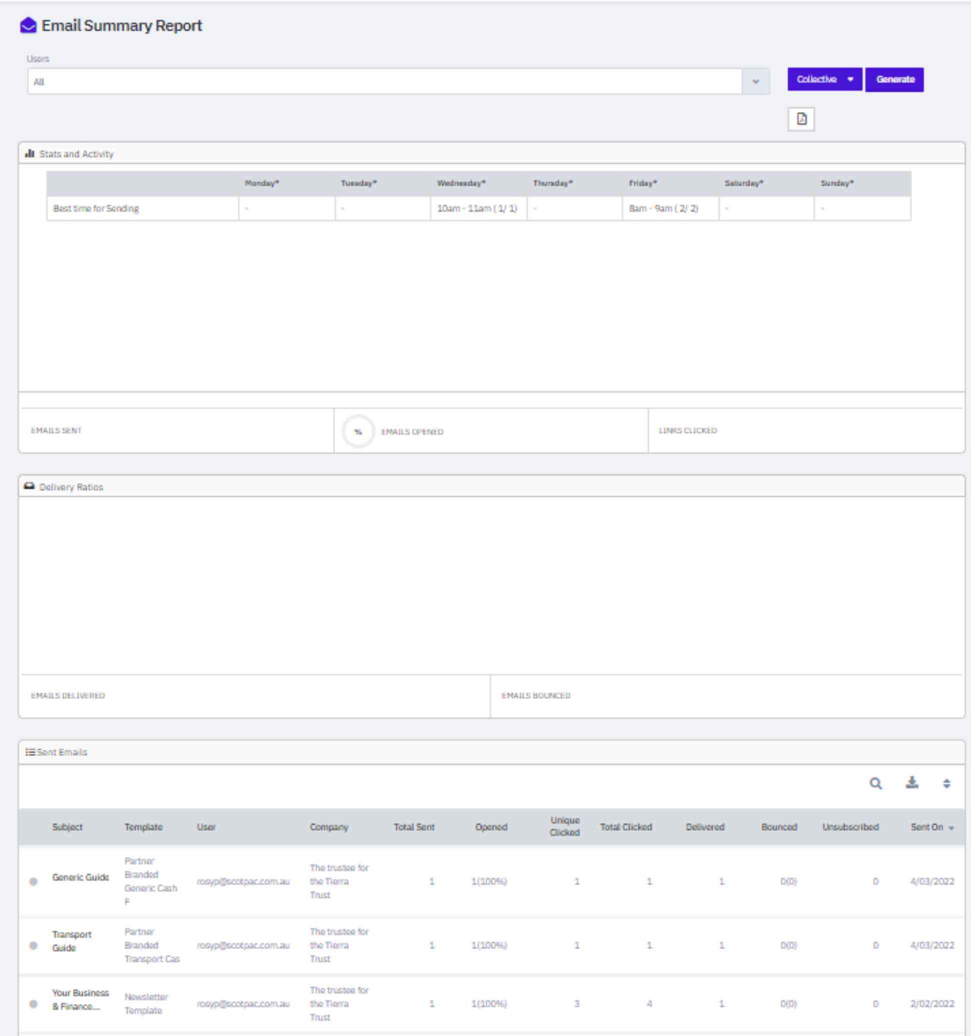


1. You'll have access to all of ScotPac's Product Summaries & Sales Resources
2. This includes cash flow guides & forecast template, application forms, privacy consent form plus more

Reporting

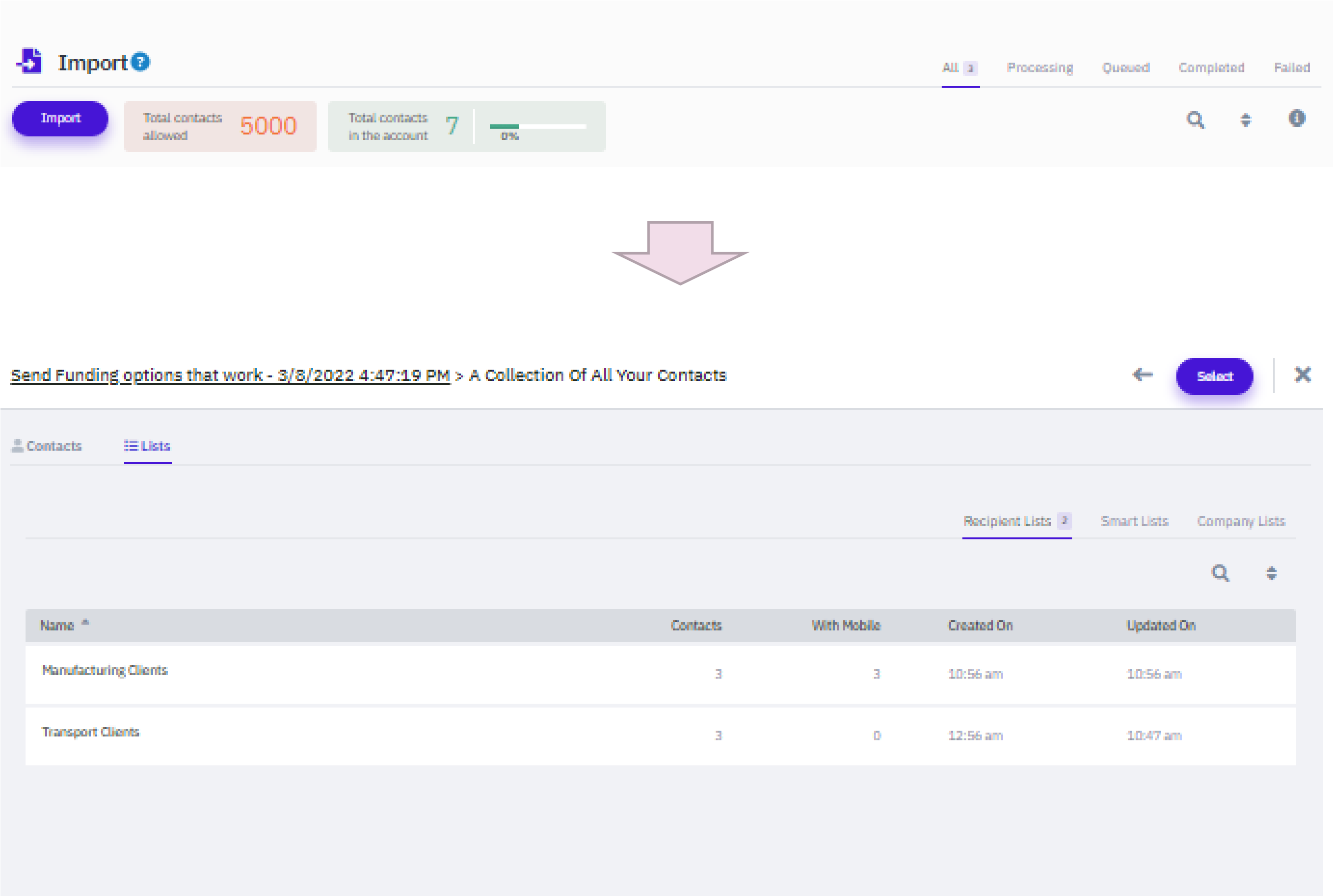
Reporting

- Newsletter & Emails Report
- Campaigns Report
- Social Campaigns & Blogs Report
- Landing Pages Report
- Sales Resources Report
- Contacts Report



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
youtube.com/channel/Scottish pacific business finance

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