

# Using Loanapp through Salestrekker User Guide

Learn how to access Loanapp through Salestrekker.



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Updated over a week ago

## Overview

Loanapp is an alternative method of submitting your loans to Lenders.

It is an electronic lodgement tool that offers a great new user experience and functionality designed to make data entry and submission to your Lender faster and easier.

## Launching Loanapp

Once you've completed all the required tabs under the Client Profile, you will be taken to the Lodgement tab. Click on Loanapp to launch your application through our platform.

The screenshot displays the Salestrekker web application interface. On the left, a dark sidebar contains a list of 19 items, with the last item, 'Lodgement', highlighted with a red rectangular border. The main content area is titled 'EDIT BROKER TOOLS' for 'Deal: Henry Small'. It features a 'Choose Gateway' section with two prominent green buttons: 'APPLY ONLINE' and 'LOANAPP'. A red arrow points directly to the 'LOANAPP' button. Below these buttons are 'PREVIOUS' and 'NEXT' navigation buttons. The top of the page has a navigation bar with icons and labels for 'Deals', 'Tasks', 'Contacts', 'Reports', 'Dashboard', 'Library', 'Connect', and a user profile 'KG'. A search bar at the top left contains the text 'Search 3 Demo N Co ...'. A green chat icon is visible in the bottom right corner.

You will see Loanapp opening in a new window, with the 'landing page' of the lender you have chosen. You will see Loanapp performing a few functions - it is auto-populating your application with any data you had entered into Salestrekker:



Test App 4

Opening the Application

Get Channel Data ✓

Transform Flat to AppForm ✓

Insert Data in Database ✓

...

Complete your application and submit it up to the Lender.

Note that if you close down Loanapp and want to re-open the same application from Salestrekker, you will now get 2 options - **Open** Application and **Update** Application:

Search 0 - Learn SFGconnect ...

\$ Deals

✓ Tasks

👤 Contacts

📊 Reports

📌 Dashboard

📖 Library

🌐 Connect

< Back to deal view

8 Insurance

9 Other advisers

Broker tools ^

10 Security details

11 Funding worksheet

12 Maximum borrowing

13 Search loan products

14 Review loan products

15 Compare loan products

16 Commissions

17 Compliance comments and docu...

18 Summary

19 Diversification opportunities

20 Lodgement

☰

📋 EDIT BROKER TOOLS  
Deal:

<=> LOANAPP

Application status

Lender:	Application ID: SFGtJyxvLpL13	Lender ID: N/A	Submitted: No	Status: N/A
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> OPEN APPLICATION

> UPDATE APPLICATION

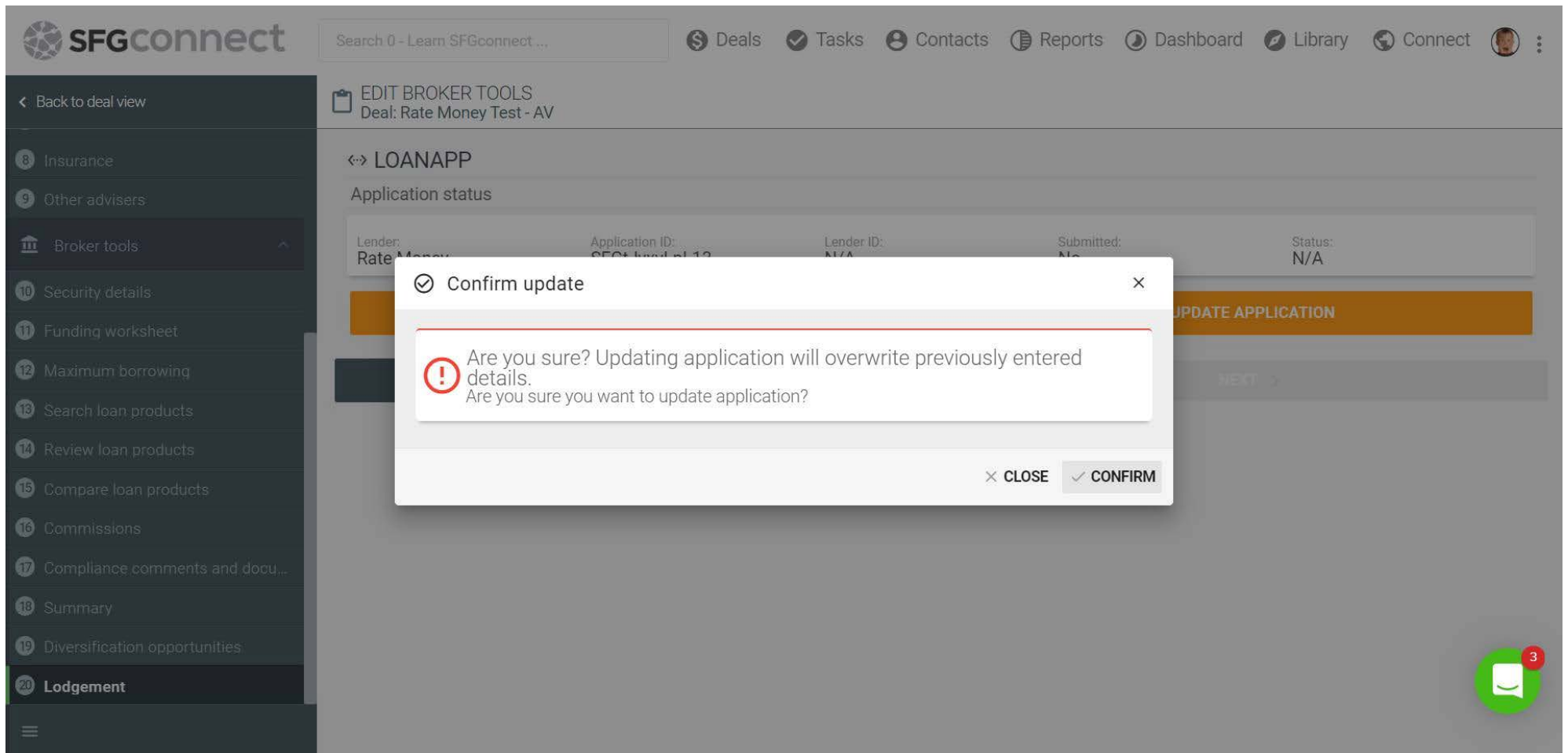
< PREVIOUS

NEXT >

It is important that you use the correct button to reopen:

- **OPEN APPLICATION** - will open the application as you last saved it in Loanapp. This means that you will keep all the data you have entered directly into Loanapp since first launch.
- **UPDATE APPLICATION** - will open the application with the data that is currently in Salestrekker for that opportunity. This means that any data you have entered into Loanapp will be overwritten by the data that is in Salestrekker. (It generally means you lose all your work in Loanapp - so use this button wisely!)

If you do choose "Update Application" you will get the following message to confirm you are happy to proceed:



Remember that Loanapp guides you all the way from data entry, generating serviceability & supporting docs checklists, Lender print forms and supporting docs upload.

If you would like to learn more about Loanapp, please see the full [Loanapp User Guide here](#)

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