



# **Simpology V2 (Easy Refinance applications)**

## **Tutorial**

 1300 232 999

 [info@granitehomeloans.com.au](mailto:info@granitehomeloans.com.au)

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# Simpology V2 – What to expect



- A better input experience
- More guided application process
- Digital consents for instant searches & automated VOI
- Dynamic checklist
- Integrated document requests
- Automated approval letters
- Zero handoff solicitor instructions

# Simpology V2 – Easy Refinance applications

- Easy Refinance available for loans over 12 months for:
  - ✓ Standard Owner Occupier & Investment
  - ✓ SMSF Residential and Commercial
  - ✓ Investment Commercial security (case by case)
  - ✓ Non-Resident and Expat
- Must be a fully packaged application with all required supporting documentation per the document checklist and valuation provided upfront
- Residential valuations for refinances
- Commercial valuations, request quotes via the Granite Broker Portal. Granite obtains quotes and provide them to you once received back, generally 2-3 days, Broker nominates valuer, Invoice generated by Granite, client pays, Granite instructs upon evidence of payment
- Current V1 process: 4 Business days to Formal Approval
- New V2 process: 24 hours to Formal Approval

# GRANITE

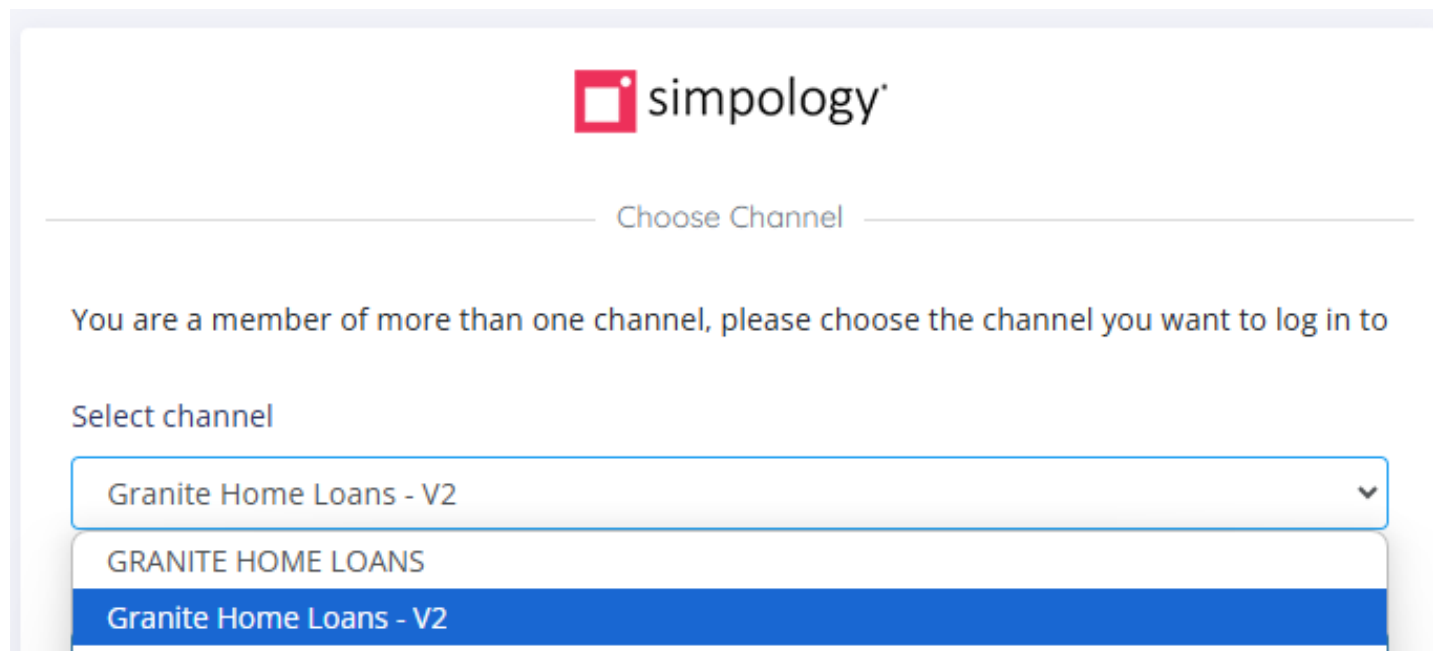
**Login and application creation**  
**Loanapp – V2 (Easy Refinance)**

# Logging into **Simpology**

- Log into Simpology by entering your username and password in the link below

<https://secure.simpology.com.au/>

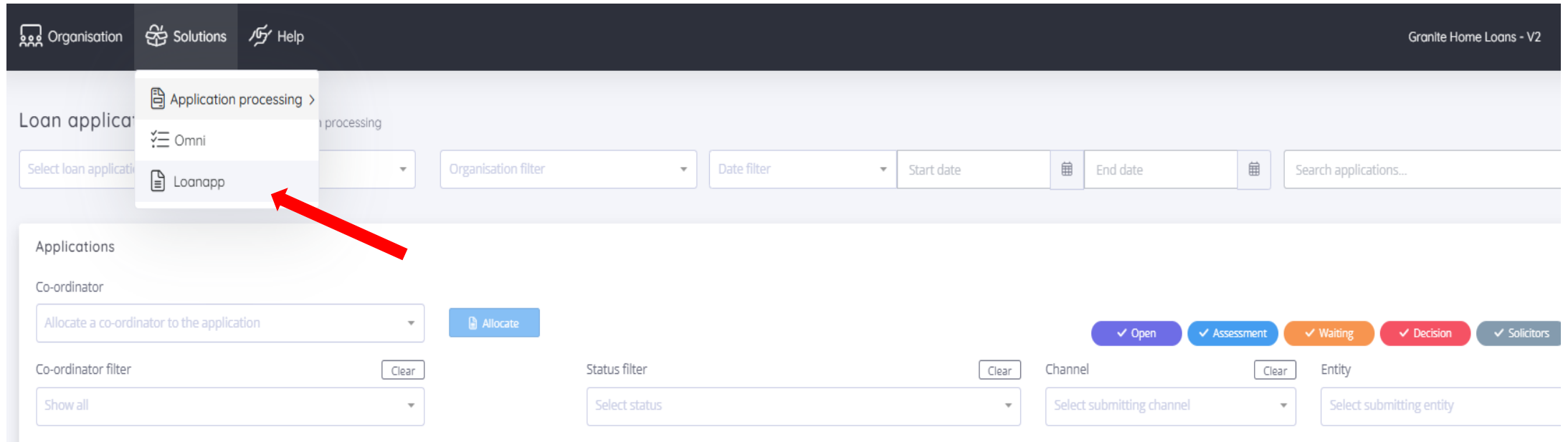
- Choose "**Granite Home Loans - V2**" from the drop down list for all **Easy Refi** Granite applications
- Choose "GRANITE HOME LOANS" for all other Granite application



The screenshot shows the Simpology login interface. At the top is the Simpology logo. Below it is a section titled "Choose Channel" with a horizontal line. Underneath, a message reads: "You are a member of more than one channel, please choose the channel you want to log in to". Below this message is a "Select channel" label and a dropdown menu. The dropdown menu is open, showing three options: "Granite Home Loans - V2", "GRANITE HOME LOANS", and "Granite Home Loans - V2". The second option, "Granite Home Loans - V2", is highlighted in blue.

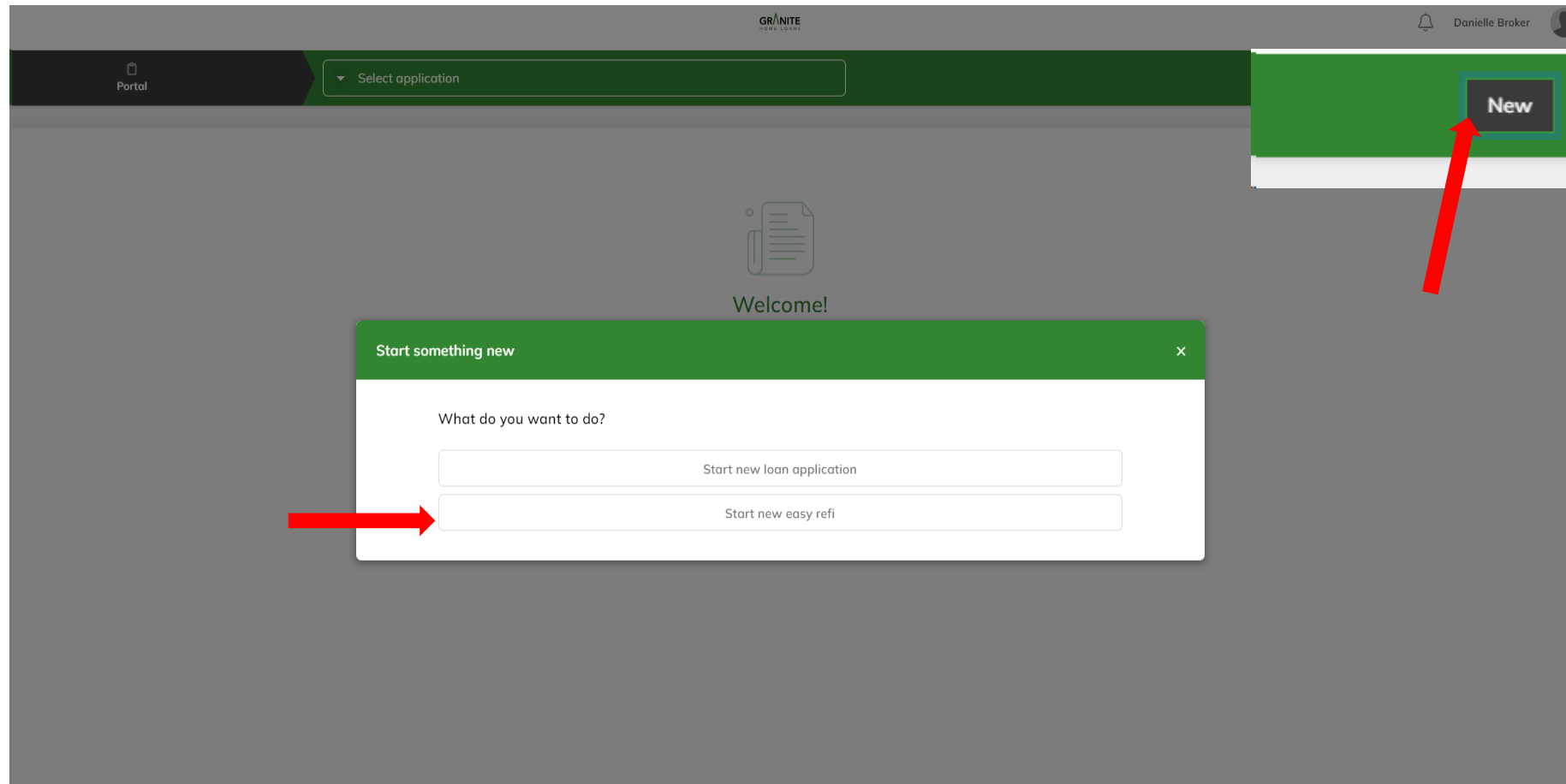
# Solutions Tab – Creating an Application

- Once logged in, go to the Solutions Menu, and select Loanapp



# Creating an application – Continued

- This takes you to Loan App, click on the New button in the right-hand corner A pop up will appear requesting what type of application you wish to enter.





# Setup of application Loanapp – V2 (Easy Refinance)

# Setup of application – Loanapp

In this section, most fields are auto-populated. When an Easy Refi application is initiated, the Primary lending purpose defaults to Refinance, and the Easy Refi toggle defaults to Yes.

The screenshot displays the 'Setup' page for application APP-216312. The interface includes a top navigation bar with 'Portal', 'Documents', and 'Communication' tabs, and a sidebar with navigation options like 'Setup', 'Application', 'Manage participants', and 'Documentation instructions'. The main content area is titled 'Setup' and contains the following fields:

- Reference number:** APP-216312
- Lender application number:** (empty)
- Aggregator reference number:** APP-216312
- Application date:** 16/01/2025
- Loan title (optional):** Test Application - Easy refinance (Residential)
- Primary lending purpose:** Refinance
- Rapid Refi?:** Yes (disabled), No (disabled), **Yes** (selected), No (disabled)
- Easy Refinance:** Yes (selected), No (disabled)
- SMSF Loan?:** **Yes** (selected), No (disabled)
- Commercial loan?:** Yes (disabled), **No** (selected)
- Amount:** \$ 500,000
- Expected settlement date:** 14/02/2025
- Accredited loan writer:** Test Broker
- Loan writer company:** Granite Home Loans - V2
- Aggregator company:** (empty)
- Business channel:** Granite Home Loans - V2

Disclosure: Please see page for Rapid refinance

# Manage Participants – Outline who is managing application

- Manage Participants: This section outlines all participants linked to the application.
- If you have a broker support person that will be assisting on this application and want the communications to be sent to them, you will need to add them here. Under the heading of Application Management click the Add button.

## Manage participants

Application management **Add +**

Participant type	Person (optional)		
Broker	Test Broker	<input checked="" type="checkbox"/>	Current co-ordinator
Broker Support Officer	Danielle Bishop	<input type="checkbox"/>	Current co-ordinator

# Manage Participants – Adding an applicant SMSF application **GRANITE**

SMSF Structure Follow the structure below when entering a SMSF application:

- Primary Borrower: SMSF Trustee Company
- Co-Borrower: SMSF Trust
- Guarantor: Bare Trustee company
- Guarantor: Bare Trust
- Guarantor: Person Applicants

Applicants **Add +** ←

Person - Type (optional)	First name	Last name
Guarantor x	Danielle	Bishop

Company - Type (optional)	Company name
Primary borrower x	Danielle SMSF Trustee Company Pty Ltd

Trust - Type (optional)	Trust name
Co-borrower x	Danielle SMSF Trust

Company - Type (optional)	Company name
Guarantor x	Danielle Bare Trustee company Pty Ltd

Trust - Type (optional)	Trust name
Guarantor x	Danielle Bare Trust

What type of Applicant?

Person Company Trust ←

Cancel Go

# Applicants – Personal details

1- Enter applicant's personal details: full name, gender, date of birth and country of birth.

 1 - Danielle Bishop  
Guarantor

### Personal details

Title	First name	Middle name (optional)	Last name
Select	Danielle		Bishop
Other name	Gender	Date of birth	Country of birth (optional)
None	None selected	DD/MM/YYYY	Select

### Contact details

Email	Mobile	Home phone	Work phone
danielle.bishop@granitetest.com	+61 0412345678	+61	+61
Preferred contact method			
Work Phone	Mobile	Landline	Email

2- Add in the email, phone numbers and preferred contact method for the applicant.

# Applicants – Address & Residency

1- Address - Current Residential Address - to add the address, select *Add Street address* then start typing the address, the address should come up from you to select.

The screenshot displays the 'Addresses' section of the Granite application form. The 'Current residential address' field is active, showing a dropdown menu with suggestions for '77 castle'. A red arrow points to the 'Add street address' button, and another red arrow points to the first suggestion. Below this, the 'Residency' section is visible, with 'Residency status' set to 'Permanent Resident' and 'Citizenship' set to 'Australia'.

**Addresses**

Current residential address

Add street address

Resided since

DD/MM/YYYY

Add street address Add other address

77 castle

- 77 Castlereagh Street Sydney NSW, Australia
- 77 Castle Street Castle Hill NSW, Australia
- 77 Castleridge Boulevard Northeast Calgary, AB, Canada
- 77 Castlereagh Road Belfast, UK
- 77 Castle Road London, UK

powered by Google

Post settlement address

Please enter address

Planned residential status

Select

**Residency**

Residency status

Permanent Resident

Citizenship

Australia

2- Residency - these fields will be automatically populated, if the applicant is not permanent resident, then these fields will need to be updated.

# Applicants – Proof of Identity

## Proof of identity

### Id documents

Australian Birth Certificate	x	...
Australian Drivers Licence	x	...
Australian Passport	x	...
Medicare Card	x	...
International Passport	x	...
International Drivers Licence	x	...



- If you are not using the digital services function, you must enter the identification information in this section.
- Click on the 3 dots for the identification document you are using for ID.
- ID document provided must be 100 counts of ID
- For example: Passport + DL = 100 counts
- Repeat this for Identification documents are you have used for identification purposes

# **Sending Digital Services – Including privacy consent** **Loanapp – V2 (Easy Refinance)**



# Applicants – Sending Digital Services

- Once you complete all the client's personal information and supplied all identity documents a pop up will appear asking you to confirm all the applicant's personal details so you can send the request for digital consent.
- ID Verification will not be sent automatically, if you wish to use this digital service, click on the arrow to expand the widget, and click request.

 **Informed consent** Requested  Waiting on 1 of 1


Request sent to



Danielle Bishop

Status

Waiting - Requested 17/01/2025, 11:44 AM

Details 

Remind 

 **ID verification** Ready  Ready 1 of 1

1 - Danielle Bishop


Sent to

Danielle Bishop

Status

Ready to request

Details 

Request 

# Privacy consent – Client view

GRANITE

1

no-reply@simpology.com  
To: Danielle Bishop  
Fri 17/01/2025 11:45 AM

Some content in this message has been blocked because the sender isn't in your Safe senders list. [Trust sender](#) [Show blocked content](#)

**CAUTION: External Email. Please do not click on links or open attachments from senders you do not trust.**

Granite Home Loans Banner

Dear Danielle Bishop,

Thank you for choosing to partner with Granite Home Loans.

We use the Simpology Loanapp platform to manage loan applications securely and efficiently.

Please complete your Simpology LoanApp registration today. To continue to Simpology, click on the link provided below

[Continue to Simpology](#)

If the button above doesn't work, please [click here](#).

We are here to assist every step of the way and look forward to working with

2

GRANITE

Hi Danielle, set your password to secure your account

Your username: danielle.bishop@colcap.com.au

Password

Confirm password

[Set password](#)

- Once you click send on electronic sign in Simpology this will trigger an email to be sent out to the customer.
- The customer will receive a no reply email shown in **step 1** and then be asked to create a password as shown in **step 2**.

# Privacy consent – Client view continued

Your privacy is very important to us

Please provide your consent



- Please read the statements below carefully.
- Check the consent check box if you agree.
- **Enter the security code sent to your email.**
- Click the 'Consent' button to register your consent.

If unsure, call Granite Home Loans on for assistance.

## Why do we need this consent?

In order to process your loan application, we need consent for Granite Home Loans and authorised 3rd parties to access your p information. We will only use this information to process your loan.

## I, Danielle Bishop, consent to:

- My personal information being used by Granite Home Loans and authorised 3rd parties to process my loan application

## Please enter the security code

Didn't receive a code? You can try to get code again in 00:27



Granite Home Loans Banner

Hi Danielle Bishop,

We want to ensure your security and privacy when providing information to Granite Home Loans.

Can you please confirm consent by entering the following 6-digit code:

816492



If you were not expecting to receive this email, please contact your Broker or Granite Home Loans at [info@granitehomeloans.com.au](mailto:info@granitehomeloans.com.au).

- Clients will need to enter the **code** emailed to them in the security code section and provide consent.
- Loanapp will be updated to show this step has been completed.

# ID Verification – Electronic VOI



## Privacy Consent

To verify your identity without the requirement for you to go to a physical location, we will use the camera on your phone to capture images of your face and your ID documents and initiate a video call with an IDVerse representative.

As such we will be needing your consent to access your camera to receive the images and to receive your location data for security purposes as well as to initiate the video call.

Without your acceptance of this declaration, you will need to verify your identity through another way as accepted by IDVerse.

I confirm that I have read and accept the privacy consent.



## Well done!

Continue to the next step where you will take a photo of your selected documents

Australian Driver Licence



Passport



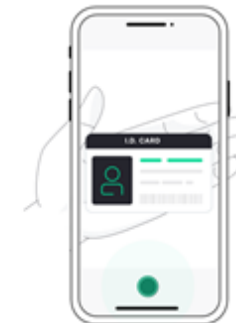
< Back

Continue



## Capture your Australian Driver Licence

Follow the tutorial to make sure you capture your Australian Driver Licence properly



< Back

Capture my ID

**Company & Trust Applicants**  
**Loanapp – V2 (Easy Refinance)**

# Company Applicants – Company details

🏠 Danielle SMSF Trustee Company Pty Ltd  
Borrower (primary)

**Company details** ←

Type of incorporation: Pty Ltd

Company name: Danielle SMSF Trustee Company Pty Ltd

ACN: 123456789

GST registered:

Registration date: 17/01/2025

Country of registration: Australia

Directors: Add + ←

Full name: Danielle Bishop

- The following fields are to be entered: Start date, Is an existing customer, Registered address, Mailing address, Directors
- Ensure that you add each Director to each company. If you selected Yes to being a company director in the previous screen, you must add that applicant here as a director.
- Repeat this for each Company applicant.

# Trust Applicants – Adding trustees



Danielle SMSF Trust  
Borrower

**Trust details** 1

Trust name: Danielle SMSF Trust

Trust purpose: SMSF 2

Establishment date: 21/01/2025 3

Trustee Add + 4

Applicant name: Danielle SMSF Trustee Company Pty Ltd

## Add in Trust details:

1. Trust name (prepopulated)
2. Trustee Purpose
3. Establishment date
4. Trustee



Danielle Bare Trust  
Guarantor

**Trust details** 1

Trust name: Danielle Bare Trust

Trust purpose: Bare Trust 2

Establishment date: 21/01/2025 3

Trustee Add + 4

Applicant name: Danielle Bare Trustee company Pty Ltd

# Trust Applicants – Adding trustees

Finances

\$ Statements of position (1) ←

Statement for

Danielle Bishop ✓

Credit status ←

Applicant name

Danielle Bishop

Status

Clean

Unknown

Warning

Applicant name

Danielle Bishop

Status

Clean

Unknown

Warning

Credit issue

Arrears x ▾

Is credit issue current?

Yes

No

Provide issue details

Please specify

Add more issues +

## Statement of position:

- This will show the applicant with a tick to confirm that the statement of position is for that person.

## Credit status:

- Here you will indicate if the applicant has a clear credit history or not.

If you select Warning, you will need to select the credit issue, state if it is a current issue and provide details.



# Financial Position

## Loanapp – V2 (Easy Refinance)

# Financial Position – Assets & Liabilities



Assets

Property (0)

Add +



Liabilities

\$0

Outstanding balance

Home loan (0)

Add +



Property details



Transaction

Owns Existing Mortgage



Property address

77 Castlereagh Street, Sydney NSW 2000 Australia



Cancel

Go

- Add applicant(s) assets and liabilities
- Each type of asset and liability has an add button, this will open the modal for each of these. Add what is relevant in each section. You will **only need add the property assets and the liability being refinanced** in this application. Any liabilities not associated, will not be added for easy refinance.

# Property Details – Adding Property + Existing loan

**Property details**

Owns Existing Mortgage  x

Property address  
77 Castlereagh Street, Sydney NSW 2000 Australia

**Property asset**

Equal share	Share - Danielle Bishop (Guarantor)	Share - Danielle SMSF Trustee Company Pty Ltd (Borrower)	Share - Danielle Bare Trustee company Pty Ltd (Guarantor)
<input type="checkbox"/>	- 0.00 % +	- 0.00 % +	- 100.00 % +
	Share - Danielle SMSF Trust (Borrower)	Share - Danielle Bare Trust (Guarantor)	
	- 0.00 % +	- 0.00 % +	

To be used as security?  Yes  No

Primary security?  Yes  No

Primary use: Residential

Primary purpose: Investment

Estimated value: \$ 1,000,000 Applicant Estimate

Status: Established

Property type: Fully Detached Ho...

Special disability accommodation provider?  Yes  No

NDIS property?  Yes  No

Holiday rental?  Yes  No

**Home loan (1)** Add +

Equal share	Share - Danielle Bishop (Guarantor)	Share - Danielle SMSF Trustee Company Pty Ltd (Borrower)	Share - Danielle Bare Trustee company Pty Ltd (Guarantor)
<input type="checkbox"/>	- 0.00 % +	- 0.00 % +	- 0.00 % +
	Share - Danielle SMSF Trust (Borrower)	Share - Danielle Bare Trust (Guarantor)	
	- 100.00 % +	- 0.00 % +	

Financial institution: CBA

Repayment type: Principal and Interest

Account number: 1234567

Annual Interest Rate: 8.00 %

Remaining term: 237

Renavments: Monthly

Original loan amount: \$ 500,000

Outstanding balance: \$ 300,000

Scheduled Balance: \$ 300,000

Security Priority: 1st Registered Mor...

Clearing balance on settlement?  Yes  No

Clearing from this loan:  Yes  No

Refinance cost: \$ 10,000

Original IO term (months): 0

Original settlement date: 24/10/2014

Original loan term (months): 360

# Financial Position – Other income

Financial Position – Other income interface showing a summary of income and a modal for adding other income details.

Summary: Employment and income (Gross amount: \$2,174.1 monthly, Net amount: \$0 monthly)

Rental (1) Add +

Rental property	Gross amount	Frequency
77 Castlereagh Street, Sydney NSW 2000 Australia	\$ 2,174.10	Monthly

Other income (0) Add +

Other income details modal:

Other income details

- For **SMSF applications**, Super Contributions are **added under Other Income**.

- Click Add and the Other income Modal will appear. Select the relevant Super contribution and add the amount, frequency and ownership and click done.

Other income details modal showing a dropdown menu for Type and an input field for Amount (AUD).

Type dropdown menu:

- Super Concessional Contribution (selected)
- Super Excess Concessional Contribution
- Super Non Concessional Contribution
- Salary Sacrifice Contribution
- Industry Super

Amount (AUD) input: \$ [ ] Select



Buttons: Cancel, Done


**Loan & Serviceability – Securities, Loan requirements,  
Rate to Borrower & Optional features**  
**Loanapp – V2 (Easy Refinance)**

# Loan & Serviceability – Securities

Property (1) Add +

1 - Property

4 Elm Grove, Springvale VIC 3171 Australia (\$1,000,000.00 - Owns Existing Mortgage, Clearing from this loan - Full)  



Zoning type (optional) RGZ1

Property type name (optional) HOUSE

Primary land use (optional) Detached Dwelling (existing)

Land area (sqm) (optional) 928

Floor area (sqm) (optional) 162

Wall material (optional) Brick veneer

Roof material (optional) Tile

Number of bedrooms (optional) 4

Number of bathrooms (optional) 3

Number of car spaces (optional) 1

Real property descriptor (optional) LOT 6 LP23683

Lot plan (optional) 6/LP23683 Greater Dandenong VIC

- For **refinance applications**, then the property details will be populated in the security section already. The system will do a search on the property and will populate the property details.
- **Click on the 3 dots** to open the security property modal. Update any relevant information in this section.

# Loan & Serviceability – Loan requirements



## Loan requirements

### Loan information

Equal share

Share - Danielle SMSF Trustee Company Pty Ltd (Borrower)

 % 

Share - Danielle SMSF Trust (Borrower)

 % 

Total borrowing amount

Split loan

### Borrowing

Primary loan purpose

Investment Residential

1 - Primary lending purpose

Refinance

ABS lending purpose

ABS-133 Refinance existing home loans - Loans held with other financial institutions

Add lending purpose +

NCCP status

Regulated

### Product

Interest type

Fixed Rate

Variable

Payment Type

Principal and Interest

Loan term

29

years

0

months

Matching product (optional)

Granite SMSF Variable rate - 7.19% (7.54% comp rate)

Features required

Internet banking

Offset

Additional repayments

LMI available

# Loan & Serviceability – Rate to borrower & Optional features **GRANITE**

**Rate to borrower** ←

**INITIAL TERM**

Initial rate	Discount margin	Adjustments	Commission
7.19 %	0.00 %	0.00 %	0.00 %

Borrowers rate

7.19 %

Initial term - Repayments

Term period (months)	Repayment frequency	Repayments	Repayment amount
348	Monthly × ▾	348	\$ 1,369.63

**Loan features** ←

Internet banking

Offset

Additional repayments

LMI available

## Rate to borrower:

- The rate to borrower will populate based on the product you select.

## Loan Features:

- Ability to select the loan features the applicant has requested under the product and if you select them here, they will populate into the loan features section later down the page.
- If you select them later in the page, it will populate here.



**Compliance – Borrower interview**  
**Loanapp – V2 (Easy Refinance)**

# Compliance – Borrower Interview

Complete the details of your interview with the applicants.



Interview

## Details

Date

28/01/2025



Location

77 Castlereagh Street, Sydney NSW 2000 Australia



Which applicants were present?

Danielle Bishop ✓

How was the meeting conducted?

In person

Phone

Video conference

Do all applicants clearly benefit from this loan?

Yes

No

Do all applicants clearly understand English?

Yes

No

## Borrowing purpose

Do the applicants plan or anticipate any changes (other than retirement) that could adversely impact their ability to repay the loan?

Danielle Bishop

Yes

No

# Compliance – Comments

## Application notes and loan writer attestation

Details

Please enter any relevant notes about this application

Please send all communications to my broker support



I attest that all applicable Fees & Charges  borrower(s)



In submitting this application I certify that:

- The reasons for the loan product selection meet the applicant's stated requirements and objectives.
- Based on my enquiries, I believe the applicant(s) will be able to comply with their financial obligations and will not experience substantial hardship.
- I have no concerns about applicant(s) identity.
- Credit guide has been provided.
- Applicant(s) can manage loan repayment.
- The data captured is correct.


- Please **add any application notes** in this section and tick the boxes to make the broker declaration.
- **Here is where you would indicate if you wanted communication from Origin to go to your broker support.**

# Support documents, Summary & Submit application Loanapp – V2 (Easy Refinance)


# Summary & Submit – Overview

This page outlines the summary of the application data. If something needs to be edited, you can click on the Edit button, and it will take you to the relevant screen.

**Summary**


 **Setup**

---

**Application** [Edit](#) 


Lender application number	Loan title	Amount	Authorization level
--	--	\$850,000	Lev A - (<\$3M)
Application date	Target date	Urgent	
24/01/2025	13/03/2025	No	
Linked commercial applications			
No			

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**Management participants(2)** [Edit](#) 

Participant type	Name	Current co-ordinator	Receive all info requests
Administrator	Leanne Sherwood	No	Yes
Broker	Leanne TestBroker	Yes	Yes

---

**Applicants** [Edit](#) 

Role	Name	Participant type	Received info requests
Primary borrower	Test Company	Company	Yes

# Summary & Submit – Documents

Here you will generate the application form and the customer needs analysis. **Click on generate documents.**

The screenshot shows a 'Documents' section with a header bar containing '4 Application generated documents', 'Generate documents', 'Delete documents', and 'Request eSign'. Below this are four document entries, each with a 'Status' field showing 'Document not generated' and buttons for 'Generate document' and 'Download'. A red box highlights the 'Generate documents' button in the top bar, with a red arrow pointing to it.

- Once the document is generated, you have the following options:
  - Request eSign, This will send the application form to the customer to sign digitally.
- It will send the Customer Needs Analysis to the broker to sign digitally.
- Download the forms, This will download the forms as a PDF so that you can get this signed manually.

# Summary & Submit – Documents

Once all documents are generated you can then **request for eSign**.

4 Application generated documents Regenerate Delete documents Request eSign ←

Documents generated Not signed

---

1 - Easy Refi Application Form (signatures required)

To be signed by	Status	
Leanne DemoTest	Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested	Details ⓘ

---

2 - Customer Needs Analysis EasyRefi (signatures required)

To be signed by	Status	
Leanne DemoTest	Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested	Details ⓘ

---

To be signed by	Status	
Leanne TestBroker	Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested	Details ⓘ

- When request eSign is selected, this page will update to **show signature requested** and the status will be **waiting - signature requested**, with the date and time sent.
- You can remind the applicant(s) that you are waiting for them to return the signed document.

# Summary & Submit – Lodgement

4 Application generated documents Regenerate Delete documents Request eSign ←

Documents generated Not signed

## 1 - Easy Refi Application Form (signatures required)

To be signed by

Status

Leanne DemoTest

Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested

Details

## 2 - Customer Needs Analysis EasyRefi (signatures required)

To be signed by

Status

Leanne DemoTest

Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested

Details

To be signed by

Status

Leanne TestBroker

Generated on 28/01/2025, 1:52 PM AEDT, signature not yet requested

Details

## Submission

- You can see along the left-hand side of the screen, all the sections now have a green tick.
- **Application comment** – you can add more relevant information in this box.

## Supporting documents

- As you enter the application data, the document checklist is generated based on the information provided. Once all information is complete and all validations have run and passed, the checklist is ready to be generated.

## Generate document checklist.

- Click on **Generate document checklist**
- A pop up will appear to for you to confirm you want to generate the checklist.
- Once you click Generate, it will generate the checklist. Click on view the checklist to take you to the supporting document checklist.



# Supporting Documents

Supporting docs APP-160182 - Regression End to End 2 31 Jan

Supporting documents

Supporting documents Documents bucket

Categories: Loaded (6/9) | Verified (0/9)  
Documents: Loaded (17/27) | Verified (0/27) | Submitted (17/27)

Document set  Show all  
Application - APP-160182 - John Pork

Application - APP-160182 - John Pork

Certificate of Completion

CertificateOfCompletion.pdf  
Uploaded: 31/01/25, 3:41 PM  
Submitted: 05/02/25, 4:04 PM

Easy Refi Application  Mandatory

View or Edit Split or Combine Reject

Active docs  Archive docs  Rejected  Large icons

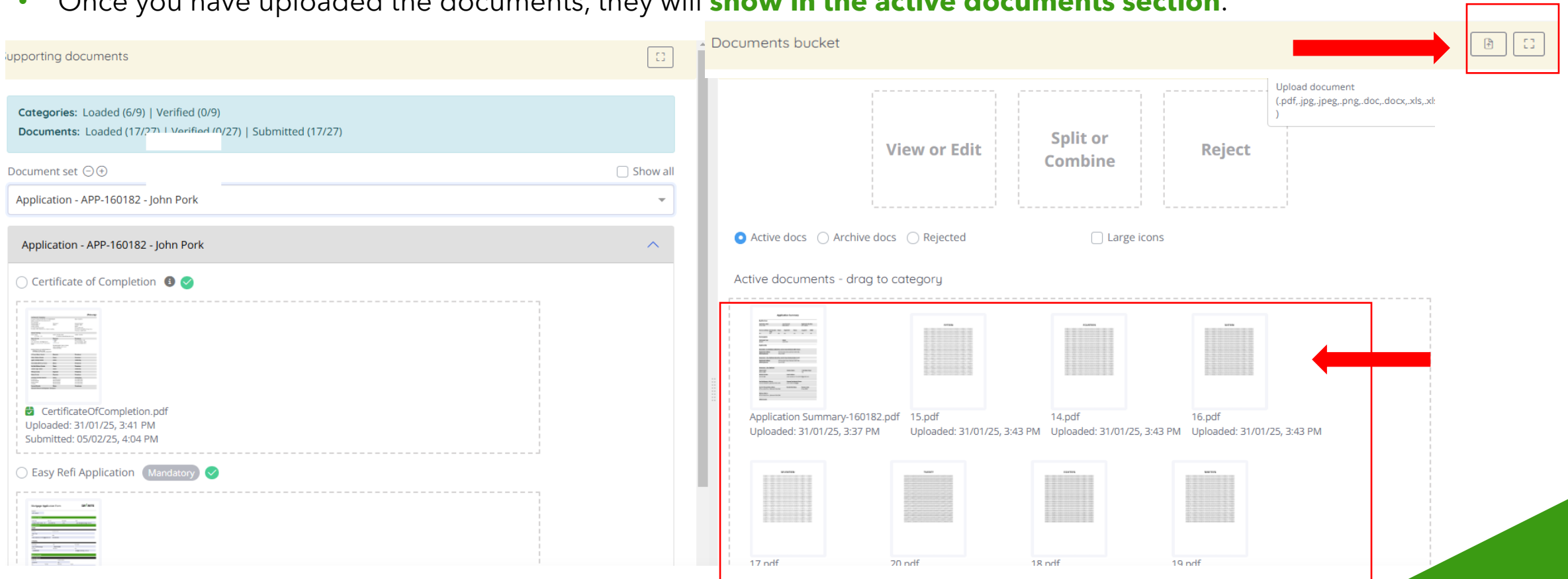
Active documents - drag to category

Application Summary-160182.pdf 15.pdf 14.pdf 16.pdf  
Uploaded: 31/01/25, 3:37 PM Uploaded: 31/01/25, 3:43 PM Uploaded: 31/01/25, 3:43 PM Uploaded: 31/01/25, 3:43 PM

17.pdf 20.pdf 18.pdf 19.pdf

# Supporting Documents – Continued

- To upload the supporting documents, **click on the upload button** in the right-hand corner of the screen.
- This will open your file explorer to locate the documents you want to upload. Select your document and click open.
- Once you have uploaded the documents, they will **show in the active documents section**.



# Supporting Documents – Drag and drop

- To complete the document checklist, **drag the documents to the correct category**.
- Once the requirement for the category is satisfied, it will **show a green tick**.

Categories: Loaded (6/9) | Verified (0/9)  
Documents: Loaded (17/27) | Verified (0/27) | Submitted (17/27)

Document set  Show all

SMSF Company - Sue Perfund SMSF Pty Ltd - John Pork

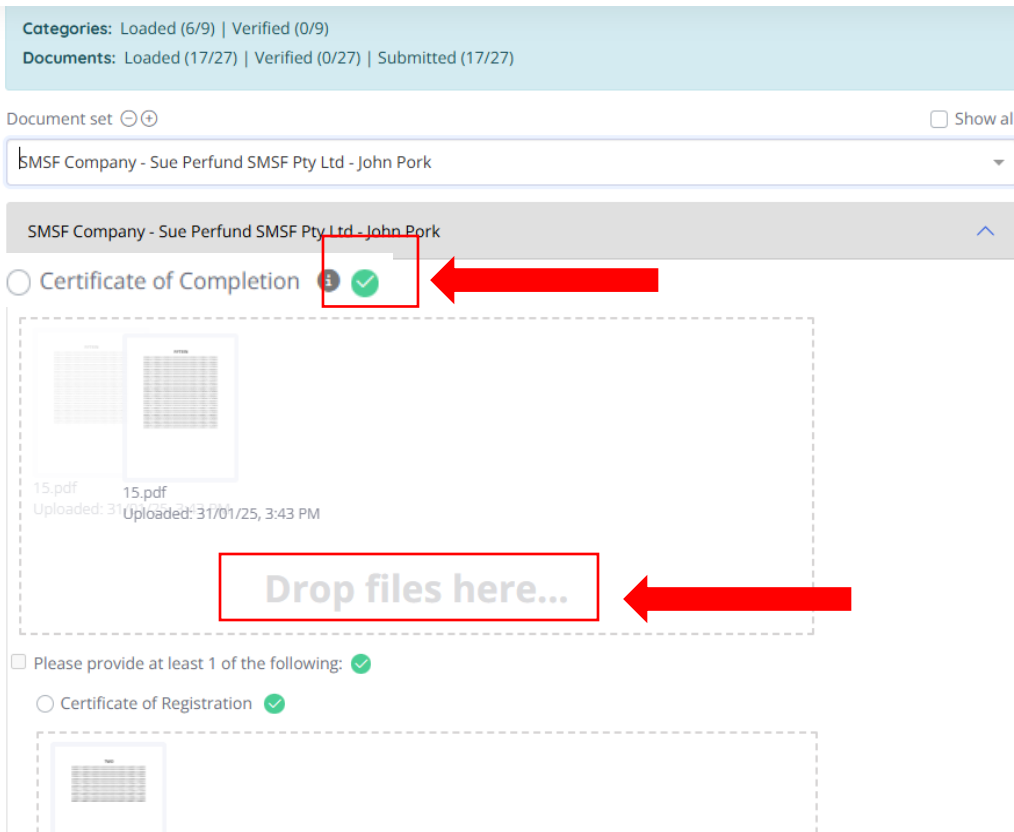
SMSF Company - Sue Perfund SMSF Pty Ltd - John Pork

Certificate of Completion

Drop files here...

Please provide at least 1 of the following:

Certificate of Registration



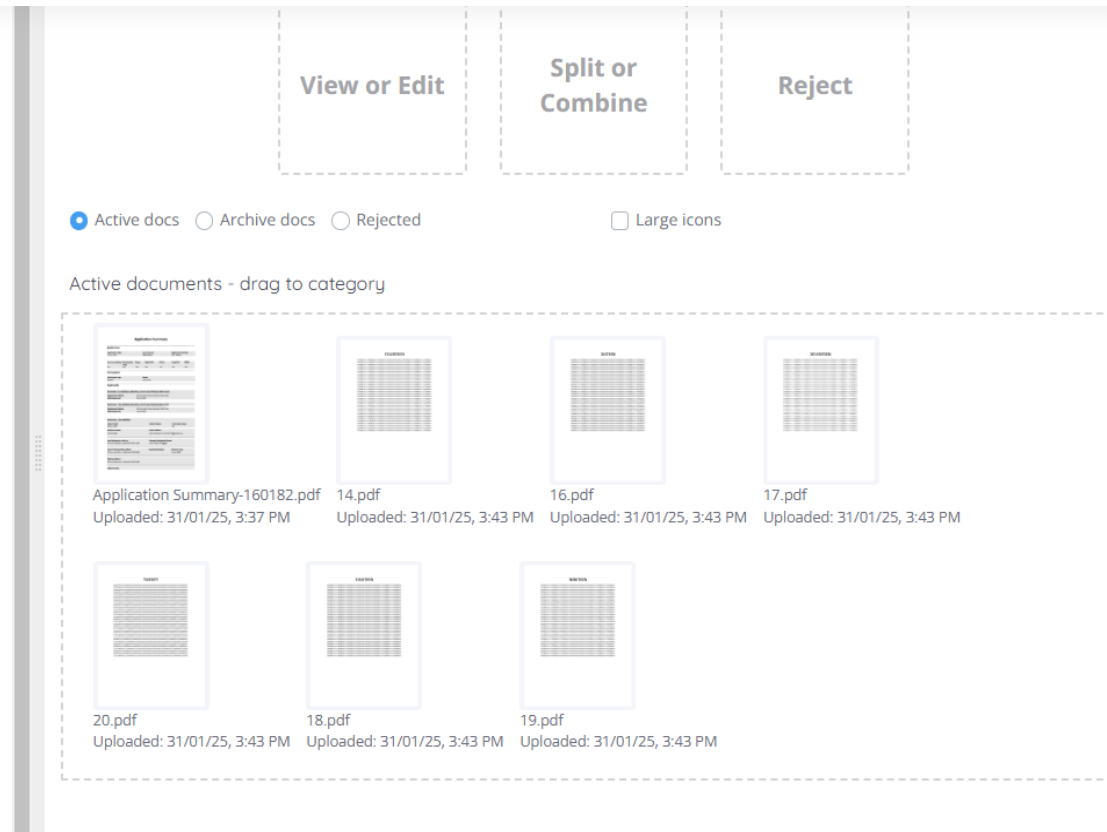
View or Edit   Split or Combine   Reject

Active docs    Archive docs    Rejected    Large icons

Active documents - drag to category

Application Summary-160182.pdf   14.pdf   16.pdf   17.pdf  
Uploaded: 31/01/25, 3:37 PM   Uploaded: 31/01/25, 3:43 PM   Uploaded: 31/01/25, 3:43 PM   Uploaded: 31/01/25, 3:43 PM

20.pdf   18.pdf   19.pdf  
Uploaded: 31/01/25, 3:43 PM   Uploaded: 31/01/25, 3:43 PM   Uploaded: 31/01/25, 3:43 PM



# Submit Application

Once the application has been submitted, a message will appear to proceed

# Congratulations You have successfully submitted an application



- Remember, you can reach out to the **team at Simpology** at any time for help via the online chat icon
- Or call the **Granite Team** on 1300 232 999

Have questions or need help?

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