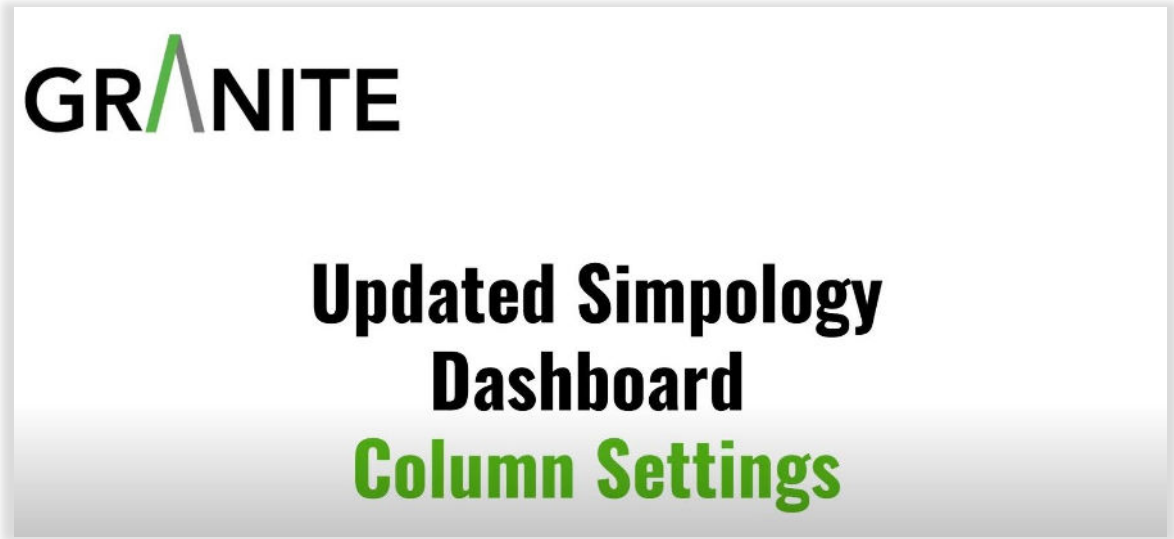
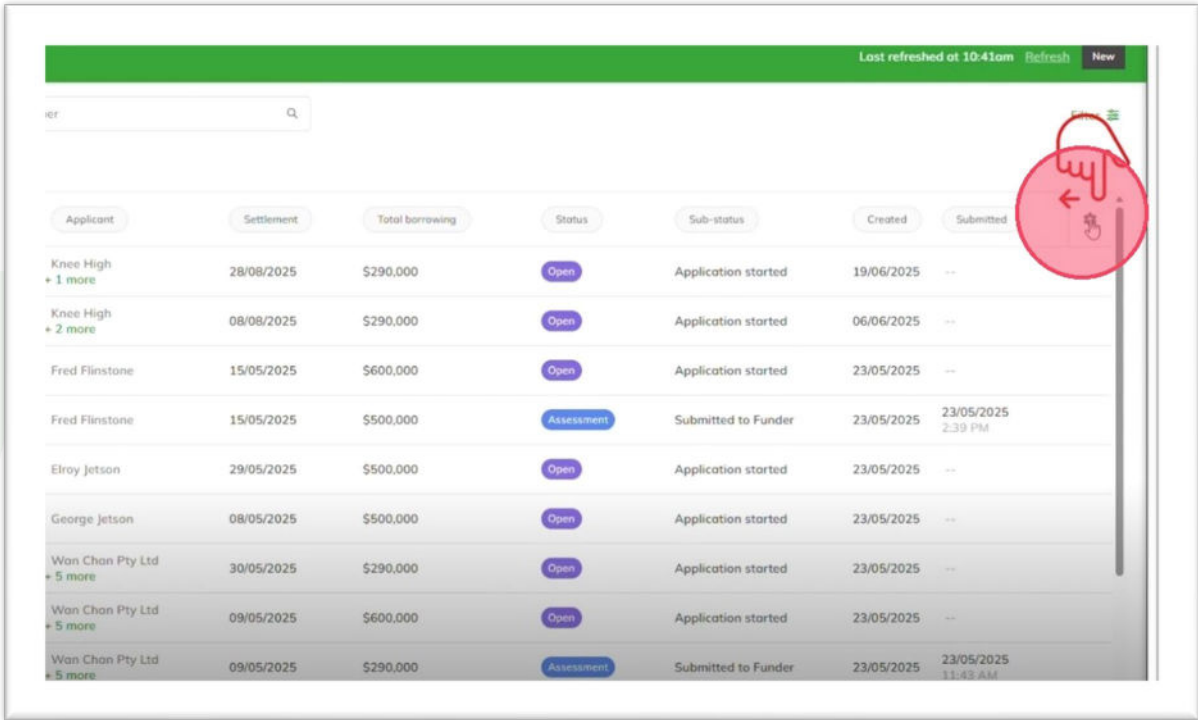


Simpology Dashboard - How to apply recommended Column settings

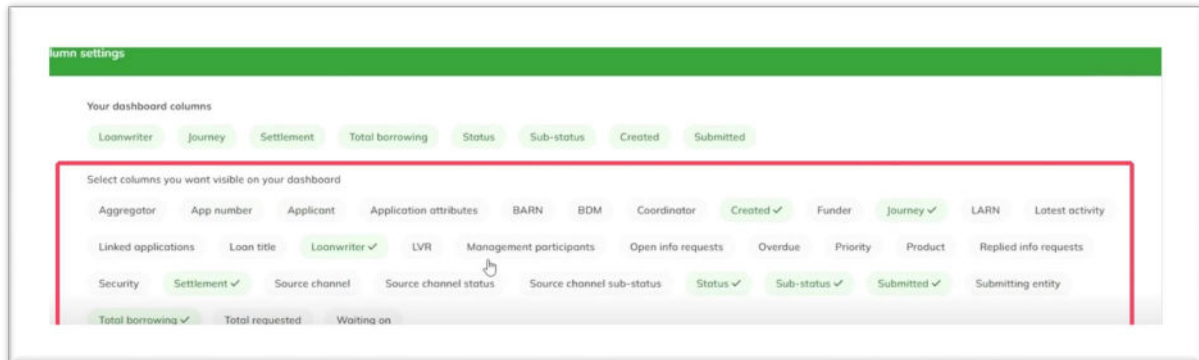
This guide will show you how to apply the recommended column settings.



- 1. Click the **cog** icon to set your columns.

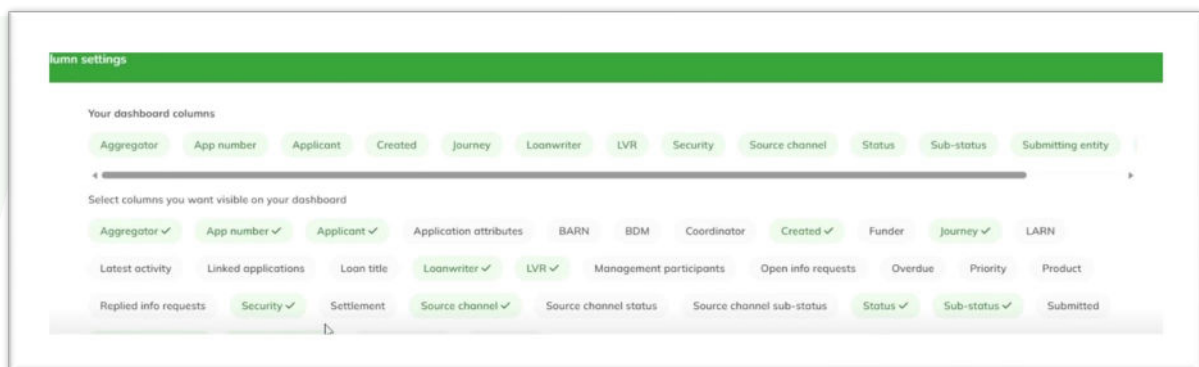


2. Untick all options highlighted in green.



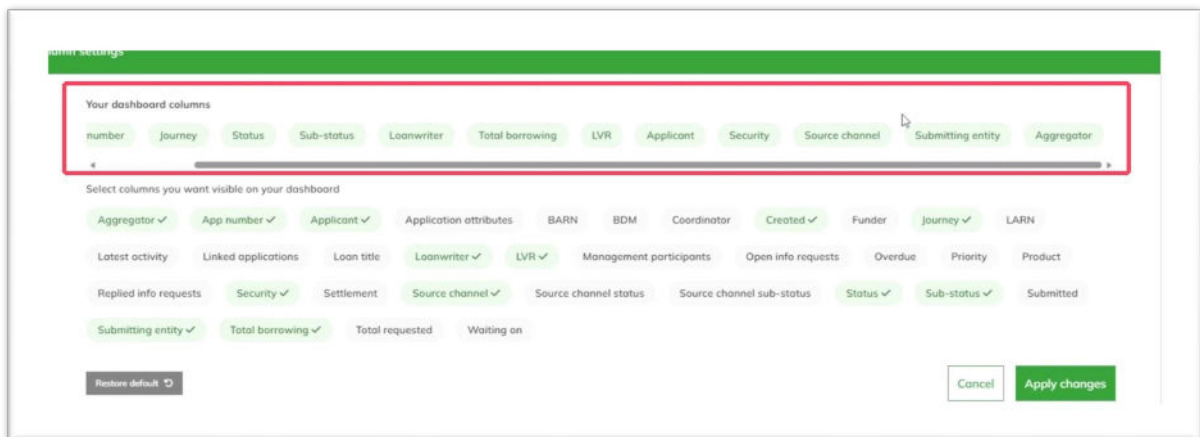
3. Select the following columns. These are the columns that you'll want to be working with:

- Aggregator
- App number
- Applicant
- Created - *this is the data application was created*
- Journey - *this tells you if it's an easy refi or a full application*
- Loan writer - *person handling the loan*
- Lvr
- Security
- Source channel - *this is where the application came from*
- Status
- Sub status
- Submitting entity
- Total borrowing.

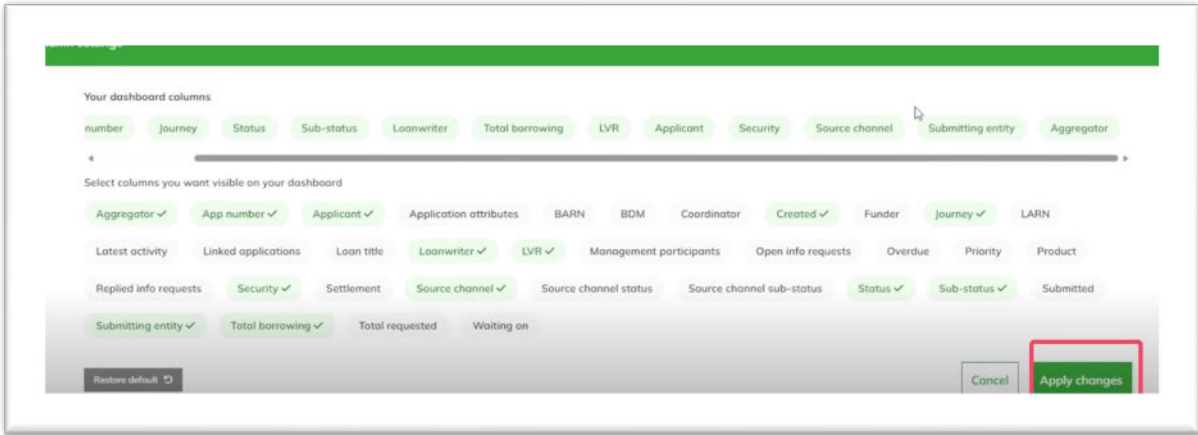


4. Next, let's arrange the order of these columns. Here's the recommended sequence:

- Created
- App number
- Journey
- Status
- Sub status
- Loan writer
- Total borrowing
- Lvr
- Applicant
- Security
- Source channel
- Submitting
- Aggregator



5. Select **Apply Changes**



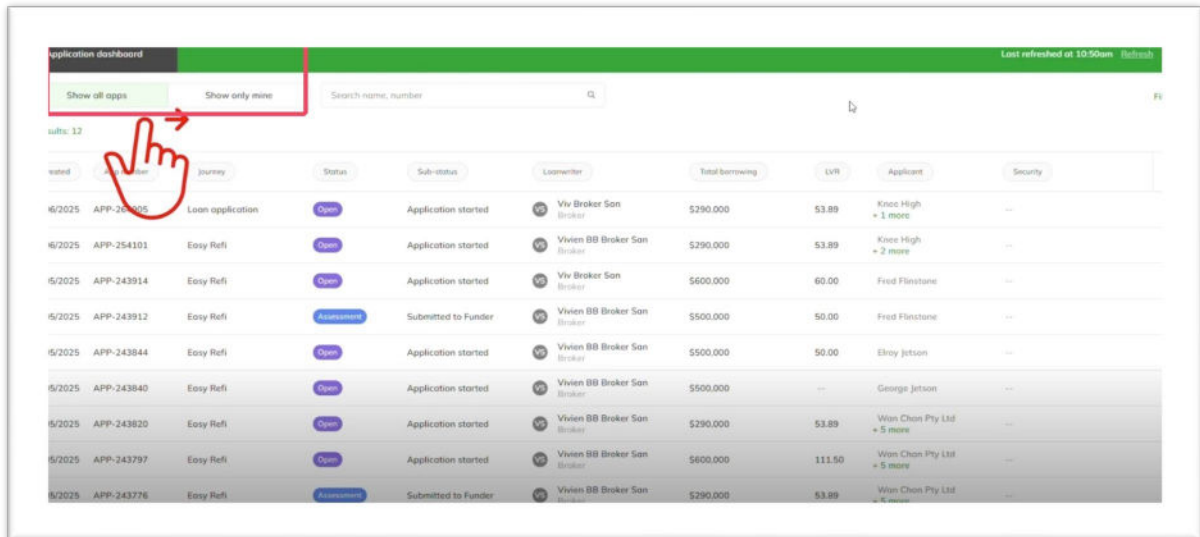
6. Your new dashboard is now customised to the recommended order.

Show all apps Show only mine Search name, number

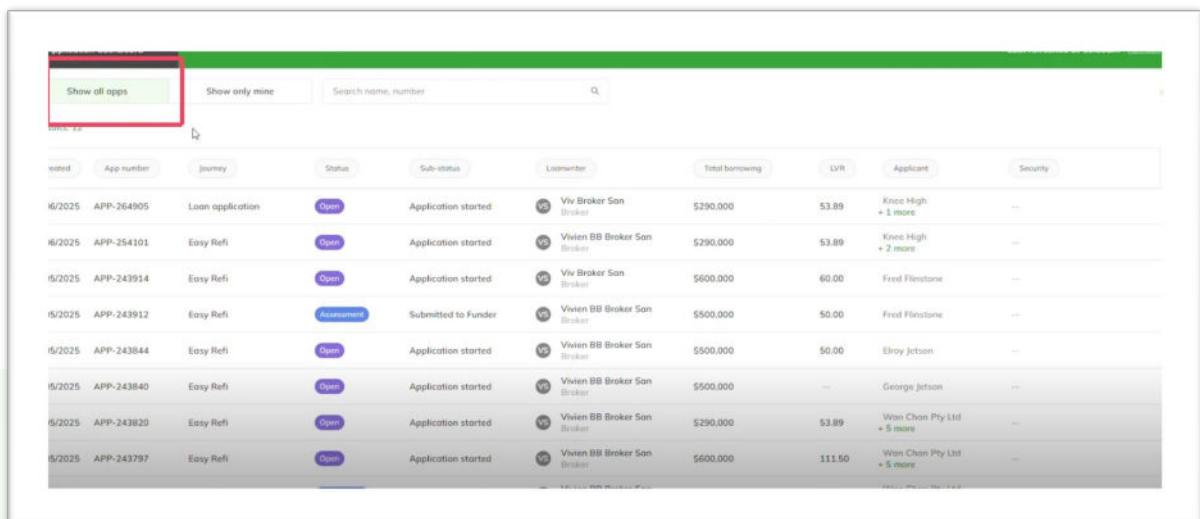
results: 12

rated	App number	Journey	Status	Sub-status	Loanwriter	Total borrowing	LVR	Applicant	Security
4/2025	APP-264905	Loan application	Open	Application started	Viv Broker Son Broker	\$290,000	53.89	Knee High + 1 more	--
4/2025	APP-254101	Easy Refi	Open	Application started	Vivien BB Broker Son Broker	\$290,000	53.89	Knee High + 2 more	--
5/2025	APP-243914	Easy Refi	Open	Application started	Viv Broker Son Broker	\$600,000	60.00	Fred Flinstone	--
5/2025	APP-243912	Easy Refi	Assessment	Submitted to Funder	Vivien BB Broker Son Broker	\$500,000	50.00	Fred Flinstone	--
5/2025	APP-243844	Easy Refi	Open	Application started	Vivien BB Broker Son Broker	\$500,000	50.00	Eloxy Jetson	--
5/2025	APP-243840	Easy Refi	Open	Application started	Vivien BB Broker Son Broker	\$500,000	--	George Jetson	--
5/2025	APP-243820	Easy Refi	Open	Application started	Vivien BB Broker Son Broker	\$290,000	53.89	Wan Chan Pty Ltd + 5 more	--
5/2025	APP-243797	Easy Refi	Open	Application started	Vivien BB Broker Son Broker	\$600,000	111.50	Wan Chan Pty Ltd + 5 more	--
5/2025	APP-243776	Easy Refi	Assessment	Submitted to Funder	Vivien BB Broker Son Broker	\$290,000	53.89	Wan Chan Pty Ltd + 5 more	--

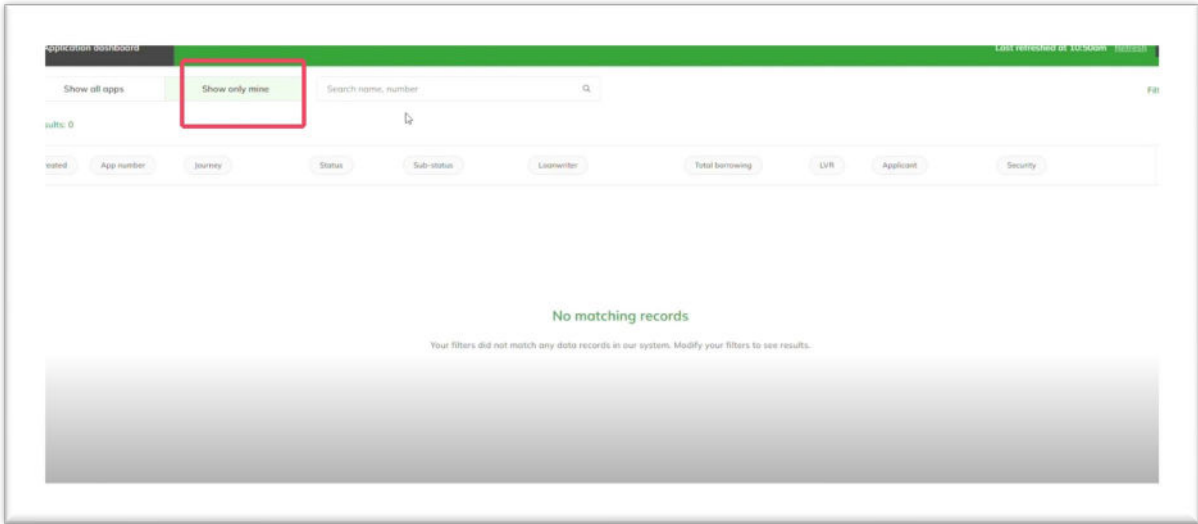
7. Now let's explore the dashboard features **Show all apps** and **Show only mine**. You'll find these tabs on the top left hand corner below Application Dashboard.



8. **Show all apps**, displays every application.



9. **Show only mine**, will show all apps assigned to you.



10. You can continue to go into processes such as loanapp documents, et cetera, from the application itself by selecting the 'more options button- which is the 3 dots.

