

What to do when you have problems launching applications in Simpology V2

Purpose

This guide outlines the process for resolving accreditation-related issues when launching new Granite applications to Simpology V2 (Loanapp V2), including the steps required to resolve common accreditation mismatches.

What causes an accreditation error?

An accreditation error occurs when one or more of the following do not match between your aggregator's CRM and the Simpology V2 system:

- First Name
- Last Name
- Email Address
- Accreditation Number

If these details do not match, a broker may be unable to launch to Loanapp V2. Loanapp V2 requires Granite to issue you with a new accreditation number.

How to resolve an accreditation issue

The process below should be followed whenever an accreditation error is encountered.

Step-by-step

Step 1 - Submit the application from your CRM

Attempt to launch the application to Loanapp V2 from your CRM.

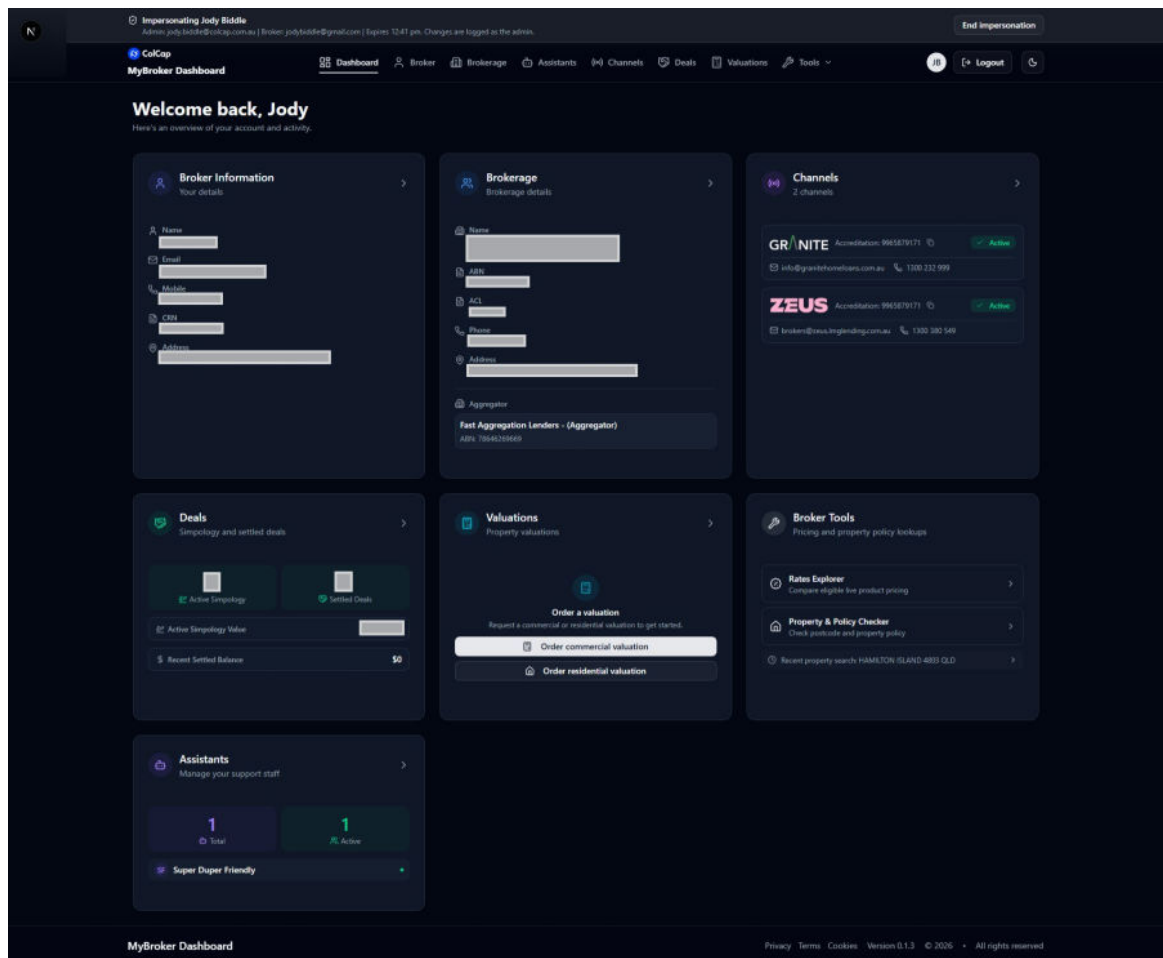
Step 2 - Did you receive an accreditation error?

- **No** → Continue with the application. No further action is required.
- **Yes** → Continue to Step 3. This means the accreditation check could not validate the broker

Step 3 - Log into the Broker Tool

Log into the Broker Tool. URL: <https://app.broker.colcap.com.au/broker>

- If your landing page looks like this, the system has recognised you as an existing user. Select the channel link and check your data (Continue to Step 5)



- If your screen does not look like the dashboard shown above, that means your user was not recognised and you need to complete the registration form

Step 4 - Access to self service?

Do you have access to update your broker data in your aggregator CRM?

- **Yes** → Update or add your accreditation number. This means you can manage your accreditation details yourself. Continue to Step 5.
- **No** → Continue to Step 5. This means any required changes may need to be completed by your Aggregator Administrator.

Step 5 - Check your data

Review the information recorded against your broker profile.

Accreditation validation relies on the information held in Simpology matching the information held in your aggregator CRM.

Check the following fields match, including any typographical errors, leading spaces, special characters:

- First Name
- Last Name
- Email Address
- Accreditation Number

If any information is incorrect, update the required details and save your changes.

Where applicable, obtain or update your accreditation number and ensure the information matches the details held by your aggregator CRM

Step 6 - Data matches?

- **Yes** → Retry the application from your CRM. This means the broker details held in Simpology match the details held in your aggregator CRM.
- **No** → Continue to Step 7. This means one or more broker details require correction.

Step 7 - CRM data correct?

- **Yes** → Update your data using the Broker Management Tool or contact your Aggregator Administrator if you do not have self-service access. This means the Simpology record requires correction.
- **No** → Contact your Aggregator Administrator/CRM Administrator. This means the information held in your aggregator CRM requires correction.