



MSA NATIONAL

User Guide for LoanTrak

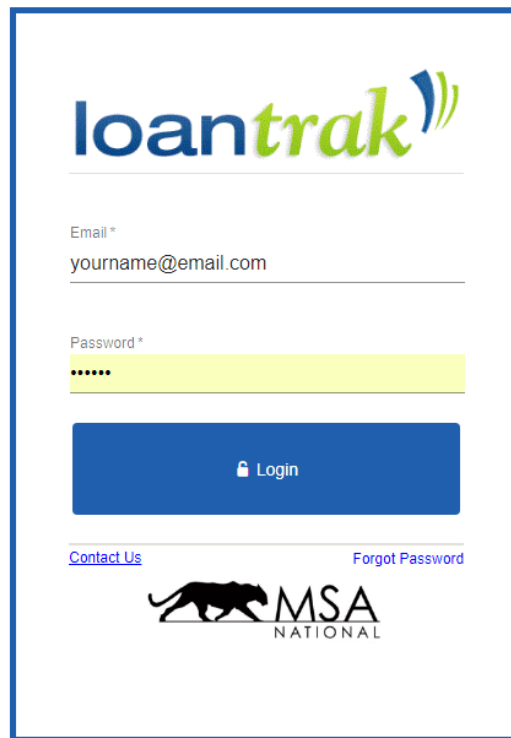
User Guide

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Logging In



The screenshot shows the LoanTrak login interface. At the top is the 'loantrak' logo. Below it is a form with two input fields: 'Email *' with the placeholder 'yourname@email.com' and 'Password *' with a masked password '*****'. A blue 'Login' button with a lock icon is positioned below the password field. At the bottom of the form are two links: 'Contact Us' and 'Forgot Password'. The MSA NATIONAL logo is at the very bottom of the page.

You will receive your username and password from MSA National which will enable you to login to *LoanTrak* via <https://www.loantrak.com.au> to view your loans.

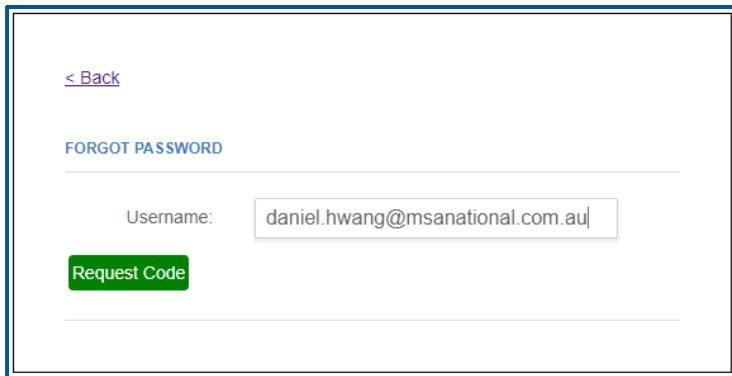
To login you will need to enter your username (*the email address you provided during the registration process*) and your password, and select **Login**.

If you are a broker, you will be directed to reset your password upon your initial login, and guided through this process.

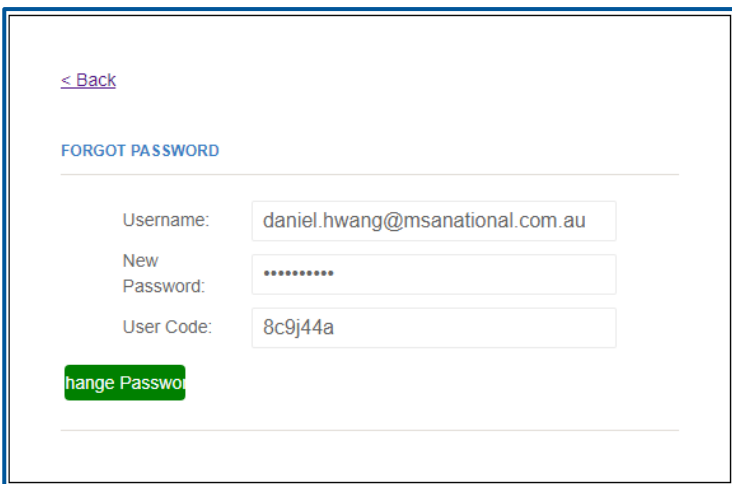
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Forgotten Passwords

If you can't remember your password, click the Forgot Password button, located in the bottom right side of the screen.



Type your email address into the *Username* field and select **Request Code**.



A unique code will be sent to your mobile phone, which you will be required to enter within 30 minutes of receipt

You will be prompted to create a new password which must include at least:

- 8 characters
- 1 uppercase character
- 1 lowercase character
- 1 number

Insert the Password Reset Code into the *User Code* field, and select **Change Password**.

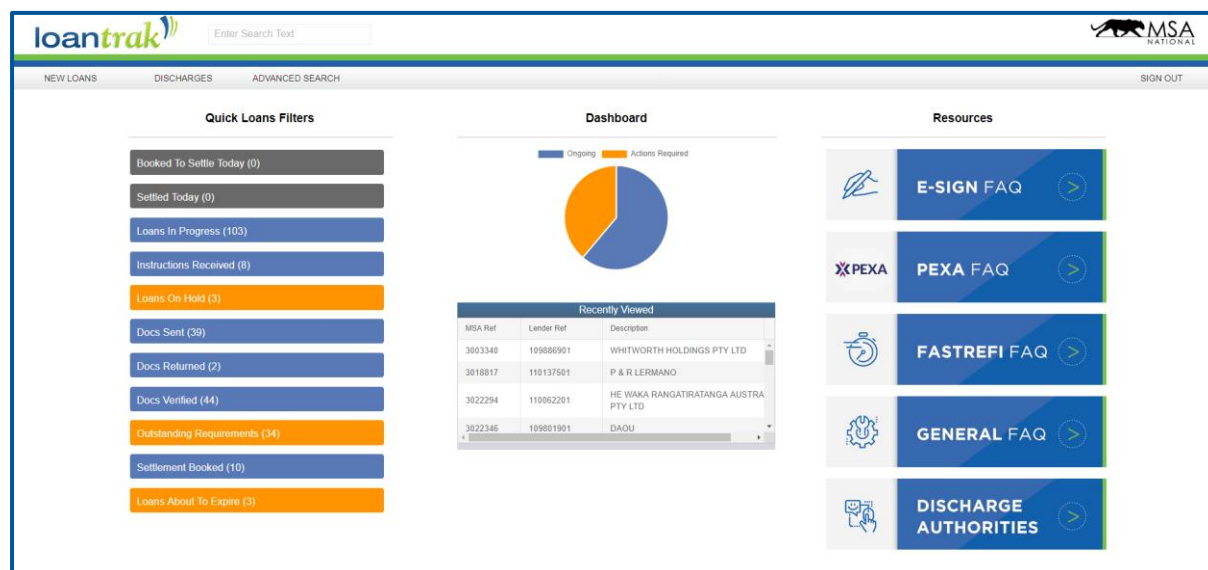
You may now log in to *LoanTrak* using your new password.

NOTE: If you are unable to access the email address associated with your account, or are having other login issues, please contact the MSA National team using the **Contact Us** button on the login page.

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New Loans

Once you have logged in, you will be automatically redirected to the *LoanTrak* New Loans page. This page shows you information on all New Loans linked to your account.



**Please allow additional loading time if you have a large number of loans.*

Using the navigation bar at the top of the page, you can navigate to [Advanced Search](#) or [Discharges](#).

When you have finished using *LoanTrak*, always remember to end your session by selecting **Sign Out** at the top right corner of the page, underneath the MSA National logo.

The New Loans page is divided into three main columns: *Quick Loans Filters*, *Dashboard* and *Resources*.

Quick Search

At the centre of the very top of the page, there is a search-bar with which you can search through all loans associated with your account.

As you type into this field, the quick-search will return matches for the *Lender Loan Reference Number*, the *Loan Description*, the *MSA Loan Reference Number* and the *Name of the Lender*.

To navigate to any of these results, simply click on any of them.

To dismiss the search bar, click anywhere else on the page or click the 'cancel' button.

For a more detailed search function with more customisable fields, you can use the [Advanced Search](#).

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Quick Loans Filters

This function allows you to see a summary of your current New Loans and their status.

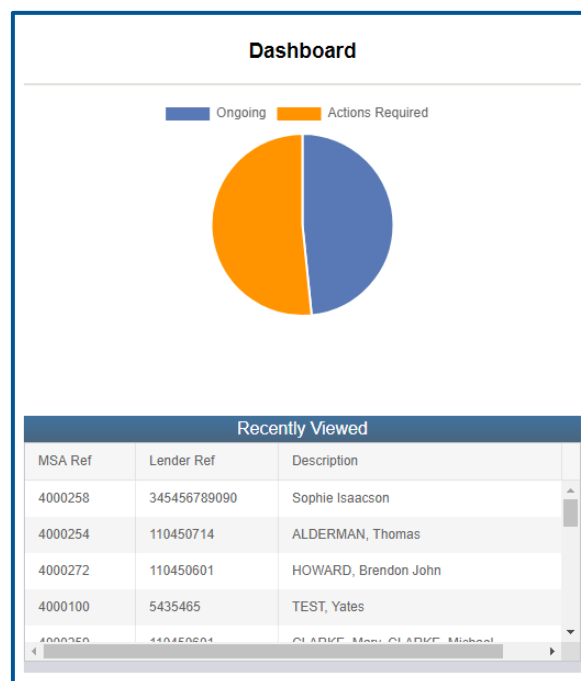
Each milestone stage will be displayed in a colour representing the current status:

- **Ongoing** – MSA is currently working on the loan.
- **Action Required** – MSA is waiting on the broker, lender or borrower to provide outstanding requirements, additional information or confirmation.
- **Settled Today** – Completed settlements for the current day.

Each milestone stage will note the number of New Loans currently at that stage. By clicking on any of these milestone stage buttons you will be taken to the [Search Results Page](#), which will show you the loans currently in this stage.

Dashboard

In the middle of the Homepage, a pie chart will display the status of your current loans.

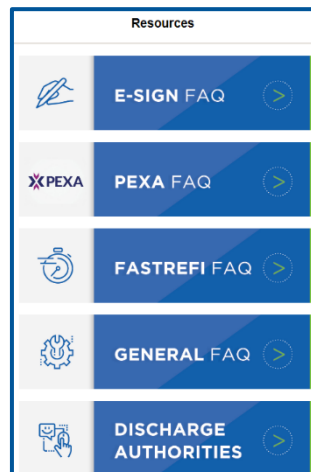


Below this chart, a list of your recently viewed loans is displayed for quick access to a loan's [Detail Page](#).

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Resources

The Resources column on the home page contains direct links to helpful resources.

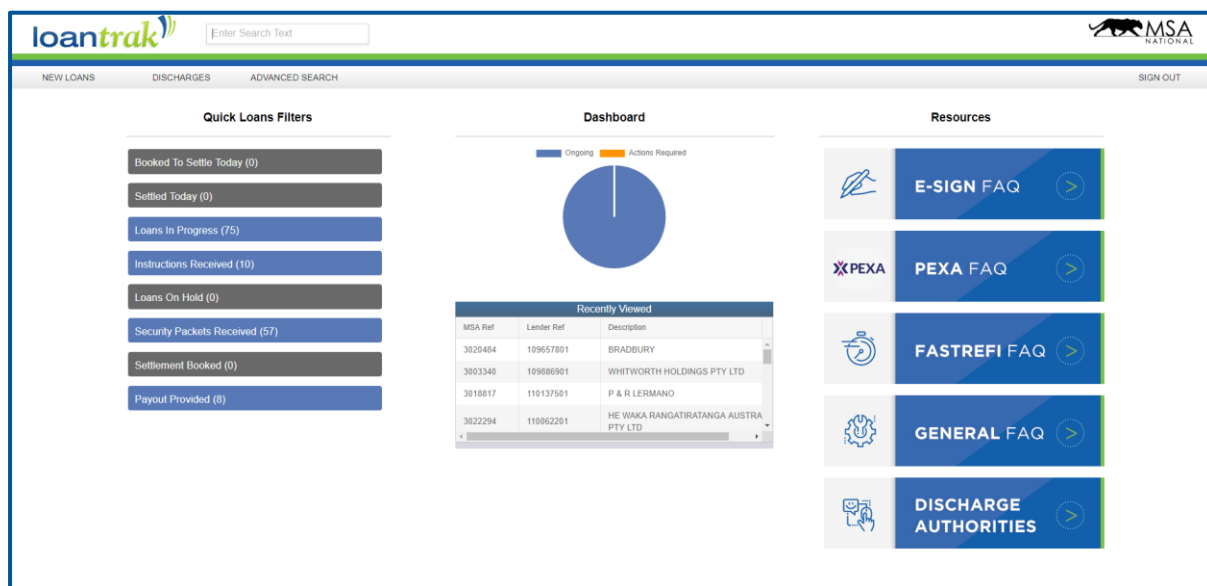


Selecting any of these links will take you directly to the relevant document or page on the *MSANational.com.au* website.

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Discharges

The Discharges page shows a summary of all Discharges associated with your account.



MSA Ref	Lender Ref	Description
3020484	109657801	BRADBURY
3003340	109606901	WHITWORTH HOLDINGS PTY LTD
3018817	110137501	P & R LERMANO
3022294	110062201	HE WAKA RANGATIRATANGA AUSTRALIA PTY LTD

Using the navigation bar at the top of the page, you can navigate back to the [New Loans](#) page or to [Advanced Search](#).

When you have finished using *LoanTrak*, always remember to end your session by selecting **Sign Out** at the top right corner of the page, underneath the MSA National logo.

The Discharges page is divided into three main columns: *Quick Loans Filters*, *Dashboard* and *Resources*.

Quick Search

At the centre of the very top of the page, there is a search-bar with which you can search through all loans associated with your account.

As you type into this field, the quick-search will return matches for the *Lender Loan Reference Number*, the *Loan Description*, the *MSA Loan Reference Number* and the *Name of the Lender*.

To navigate to any of these results, simply click on any of them.

To dismiss the search bar, click anywhere else on the page or click the 'cancel' button.

For a more detailed search function with more customisable fields, you can use the [Advanced Search](#).

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Quick Loans Filters

This function allows you to see a summary of your current Discharges and their status.

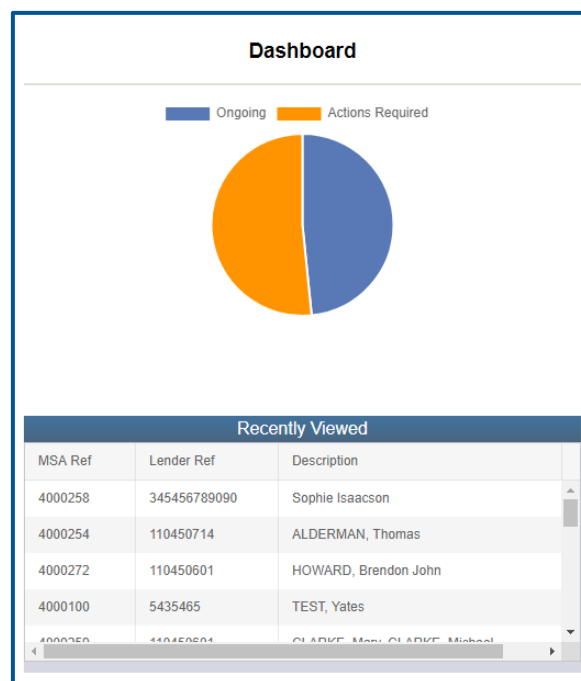
Each milestone stage will be displayed in a colour representing the current status:

- **Ongoing** – MSA is currently working on the loan.
- **Action Required** – MSA is waiting on the broker, lender or borrower to provide outstanding requirements, additional information or confirmation.
- **Settled Today** – Completed settlements for the current day.

Each milestone stage will note the number of loans currently at that stage. By clicking on any of these milestone stage buttons you will be taken to the [Search Results Page](#), which will show you the loans currently in this stage.

Dashboard

In the middle of the page, a pie chart will display the status of your current loans.

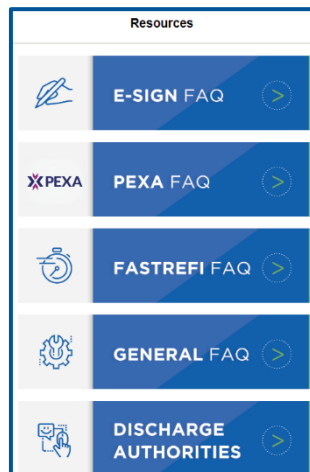


Below this chart, a list of your recently viewed loans is displayed for quick access to a loan's [Detail Page](#).

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Resources

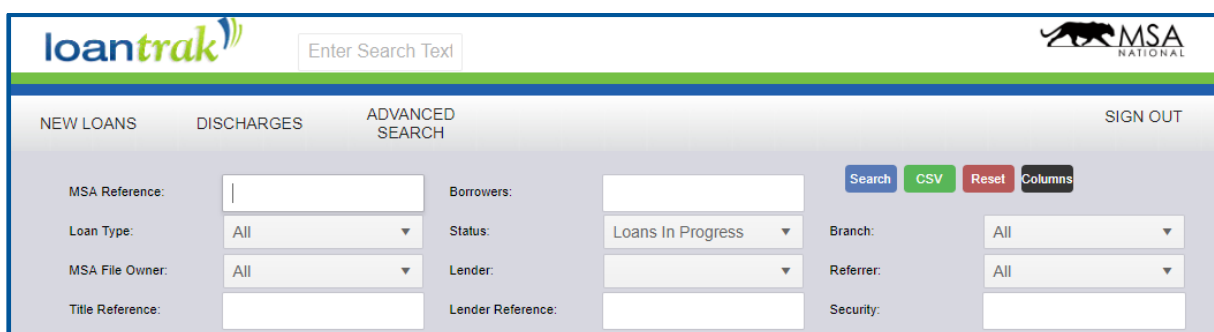
The Resources column on the home page contains direct links to helpful resources.



Selecting any of these links will take you directly to the relevant document or page on the MSANational.com.au website.

Advanced Search

To search through any of your loans, navigate to the *Advanced Search* page using either the **Advanced Search** tab in the navigation bar at the top of any page, or by selecting any of the [Quick Loan Filters](#) on either the [New Loans](#) or [Discharges](#) pages.



The screenshot shows the 'Advanced Search' tab selected in the navigation bar. The search interface includes a search bar at the top with the placeholder 'Enter Search Text'. Below the navigation bar, there are several search filters arranged in a grid:

- MSA Reference:** A text input field.
- Loan Type:** A dropdown menu with 'All' selected.
- MSA File Owner:** A dropdown menu with 'All' selected.
- Title Reference:** A text input field.
- Borrowers:** A text input field.
- Status:** A dropdown menu with 'Loans In Progress' selected.
- Lender:** A dropdown menu.
- Lender Reference:** A text input field.
- Branch:** A dropdown menu with 'All' selected.
- Referrer:** A dropdown menu with 'All' selected.
- Security:** A text input field.

At the top right of the search area, there are buttons for 'Search', 'CSV', 'Reset', and 'Columns'. A 'SIGN OUT' link is also visible in the top right corner.

LoanTrak allows you to use multiple options when searching for your loans.

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Search

MSA Ref	MSA File Owner	Branch	Borrowers	Securities	Title Ref
4000254	Adminnn Admin	WA	ALDERMAN, Thomas	46 Daly Terrace GUNNS ROCKS,	Volume 1272 Folia 78,
4000243	Emma Neibending	NSW	Alyssa Post		
4000277	Elisayed Linda	NSW	BAKER, Hanna, BAKER, Philip	78 Penny Road TANNERVILLE,	Volume 1272 Folia 78,
4000265	Anthony Auspek	NSW	BLOGGS, John	9 Evergreen Terrace LAKE HILL,	Folio Identifier 1/787432,
4000274	Emma Neibending	NSW	BUSHBY, Jeremy , OCONNOR, Kaseen	52 Duff Street MOORE RIVER NATIONAL PARK,	Volume 1272 Folia 78,
4000259	Yasmin Humaidan	NSW	CLARKE, Mary, CLARKE, Michael	3 Melrose Crescent BLAKEHURST,	Volume 1272 Folia 78,
4000271	Adminnn Admin	NSW	EDMAN, Hunter	83 Ocean Pde CUNGULLA,	Volume 1272 Folia 78,
4000270	Adminnn Admin	NSW	GREEVES, Luca	1 Rose Place SYDNEY,	Folio Identifier 1/554321,
4000283	Emma Neibending	NSW	HARRIS, Christos	143 St Albans Road THOMSON,	Volume 1272 Folia 78,
4000282	Emma Neibending	NSW	HEYUN, Mary	45 Genny Avenue Heritage,	Volume 1272 Folia 78,

Clicking **Search** will search the database for these fields, and display any results found in your web-browser in a list format.

Select any of the displayed loans to view the loan's [Detail Page](#).

Ten results will be displayed per page. To display more results, navigate to the next page or the last using the arrows found at the bottom of the screen. Alternatively, you are able to select a specific page number to navigate to.

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CSV

Rather than displaying the results of the search in your browser, clicking the **CSV** button will collate the results of your search in a Comma Separated Values (.csv) file, which will be automatically downloaded to your computer.

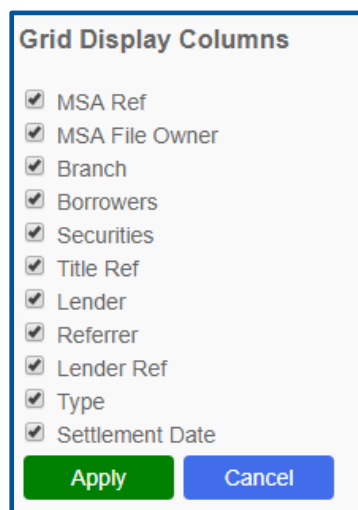
This file can then be opened in programs such as Microsoft Excel

Reset

The **Reset** button can be used to clear all the data you have entered into the search fields

Columns

The columns button can be used to specify which fields to display in the results from the search.



The dialog box titled "Grid Display Columns" contains a list of fields with checkboxes next to them. All checkboxes are checked. At the bottom of the dialog are two buttons: "Apply" (green) and "Cancel" (blue).

Field	Selected
MSA Ref	☒
MSA File Owner	☒
Branch	☒
Borrowers	☒
Securities	☒
Title Ref	☒
Lender	☒
Referrer	☒
Lender Ref	☒
Type	☒
Settlement Date	☒

By default, all fields will be displayed.

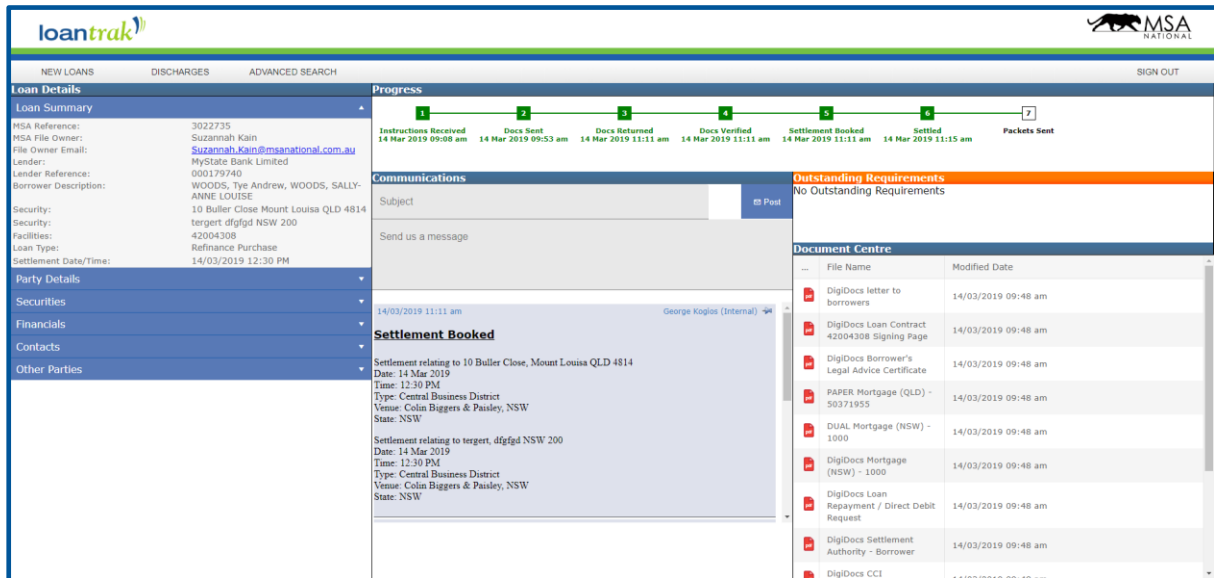
To turn a field off or back on, select the checkbox next to the respective field.

Once you have selected your fields of interest, click the **Apply** button to apply the changes or click the **Cancel** button to discard the changes which were made.

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Loan Details

You can view the details of each loan by selecting a loan from your [Dashboard](#) or from a [Search](#) result.



The screenshot shows the 'Loan Details' page in the loantrak system. The page is divided into several sections:

- Loan Summary:** Displays loan details such as MSA Reference (3022735), MSA File Owner (Suzannah Kain), File Owner Email (Suzannah.Kain@msanational.com.au), Lender (MyState Bank Limited), Lender Reference (000179740), Borrower Description (WOODS, Tye Andrew, WOODS, SALLY-ANNE LOUISE), Security (10 Buller Close Mount Louisa QLD 4814), Facilities (terget dfqfd NSW 200), Loan Type (Refinance Purchase), and Settlement Date/Time (14/03/2019 12:30 PM).
- Party Details:** A dropdown menu with options for Party Details, Securities, Financials, Contacts, and Other Parties.
- Progress:** A horizontal timeline showing the loan process steps: 1. Instructions Received (14 Mar 2019 09:08 am), 2. Docs Sent (14 Mar 2019 09:53 am), 3. Docs Returned (14 Mar 2019 11:11 am), 4. Docs Verified (14 Mar 2019 11:11 am), 5. Settlement Booked (14 Mar 2019 11:11 am), 6. Settled (14 Mar 2019 11:15 am), and 7. Packets Sent.
- Communications:** A section for sending messages to the borrower, showing a message sent on 14/03/2019 11:11 am by George Kogios (Internal).
- Settlement Booked:** A section showing settlement details for two loans: one relating to 10 Buller Close, Mount Louisa QLD 4814, and another relating to terget, dfqfd NSW 200. Both settlements occurred on 14 Mar 2019 at 12:30 PM.
- Outstanding Requirements:** A section indicating 'No Outstanding Requirements'.
- Document Centre:** A table listing documents uploaded to the system, including 'DigiDocs letter to borrowers', 'DigiDocs Loan Contract 42004308 Signing Page', 'DigiDocs Borrower's Legal Advice Certificate', 'PAPER Mortgage (QLD) - 50371955', 'DUAL Mortgage (NSW) - 1000', 'DigiDocs Mortgage (NSW) - 1000', 'DigiDocs Loan Repayment / Direct Debit Request', 'DigiDocs Settlement Authority - Borrower', and 'DigiDocs CCI'.

The page is split into five key sections:

1. [Loan Details](#)
2. [Progress Bar](#)
3. [Communications](#)
4. [Outstanding Requirements](#)
5. [Document Centre](#)

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Loan Details

The **Loan Details** section contains key details for a loan. By default, the Loan Summary is displayed.

Loan Details	
Loan Summary	
MSA Reference:	4000254
MSA File Owner:	Adminnn Admin
File Owner Email:	Admin@msanational.com.au
Lender:	ING Test
Lender Reference:	110450714
Borrower Description:	ALDERMAN, Thomas
Security:	46 Daly Terrace QUINNS ROCKS ACT 2913
Facilities:	110450601
Loan Type:	Refinance
Settlement Date/Time:	-
Party Details	
Securities	
Financials	
Contacts	
Other Parties	

To display other details about the loan, click on the tabs which will expand and display the relevant information (*e.g. clicking Party Details in the screenshot will display the Party Details for the loan.*)

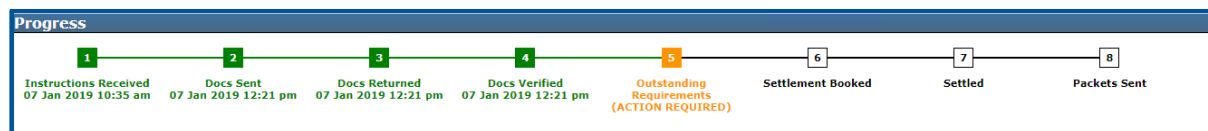
To close a section, simply click that field name again.

A refresh button underneath the Loan Details Section can be clicked to re-acquire the relevant Loan data.

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Progress Bar

The **Progress Bar** for each loan is located at the top of the Loan Details page.



This bar indicates the current status of the loan. Milestones that are coloured in green are completed, whereas orange milestones require action, and white coloured milestones are future milestones.

Loan Discharges have different milestones displayed, due to their different workflow.

Communications

The Communications tab can be used to send messages to MSA National's File Owner in relation to the loan.



Communications

Subject: [] Post

Send us a message

07/01/2019 12:28 pm Emma Nelberding (MSA) →

Check return documents - o/s

for Matter 46 Daly Terrace, QUINNS ROCKS ACT 2913

We acknowledge receipt of documents in relation to the above matter.

The following items remain outstanding.

- Discharge Authority
- Personal Loan Statements
- Certificate of Building Insurance for minimum \$510,000.00 - 46 Daly Terrace, QUINNS ROCKS

07/01/2019 12:18 pm Emma Nelberding (MSA) →

QAD

07/01/2019 12:18 pm Emma Nelberding (MSA) →

Documents prepared

Documents prepared and will be sent to the borrower via express posted:

To send a message, type the subject of the message into the *Subject* box and the content of your message into the *Send us a message* box.

When your message is complete, click the **Post** button, and the message will be sent to MSA's File Owner and will be saved in *LoanTrak*.

Outstanding Requirements

Outstanding Requirements
Discharge Authority
Personal Loan Statements
Certificate of Building Insurance for minimum \$510,000.00 - 46 Daly Terrace, QUINNS ROCKS

The **Outstanding Requirements** tab displays all the actions that are currently required to progress the current loan.

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Document Centre

The **Document Centre** contains links to all documents relevant to the current loan, once they have been prepared and sent out.

Document Centre		
...	File Name	Modified Date
	Frontcover - ING	07/01/2019 11:26 am
	Letter to borrower - Matthew Woods	07/01/2019 11:26 am
	Loan Agreement	07/01/2019 11:26 am
	Mortgage (VIC) - 4060/101	07/01/2019 11:26 am
	Direct Debit Request Form	07/01/2019 11:26 am
	Settlement Authority - Borrower	07/01/2019 11:26 am
	Estimated Costs Statement	07/01/2019 11:26 am

Clicking into any of these files will download it and open the document via your web-browser in a read-only, watermarked view.

If you are using *Google Chrome*, you may have to enable popups for the document to open.