

# Bank Statements Process 1/3

## Broker User Guide - Bank Statement request

### Bank statements \*

- ☐ BrokerFlow ?
- ☐ Send bank link to customer

1

For **Full Doc** applications, we require the customer to provide bank statements through Illion's Bank Statement services.

There are 2 ways which we obtain this requirement:

1. Broker Flow (go to step 2)
2. Send bank link to customer (go to step 6)

2

If the Broker is subscribed to Illion's (Proviso) Bank Statement and has already obtained this from the customer, select **"BrokerFlow"**.

Submit existing bank statements via the BrokerFlow platform to receive a quick response.

Document ID

PROCEED

3

Open the Illion's (Proviso) bank statement and locate the **Document ID**.

Enter the number in the **Document ID** in MyAngle.

Click **Proceed**.

Account Holder: Commonwealth Bank  
Institution: Commonwealth Bank  
Period: 26-05-2023 to 24-08-2023 (90 days)  
Referral Code: [REDACTED]  
Document ID: GS2RQ5YJD  
Submission Time: 24 August 2023 13:02:12  
Submitted Accounts:

All Accounts Summary  
Opening Balance: \$1,149.03 Closing Balance: \$37,933.74  
Total Credits: \$37,933.74 Total Debits: \$60.74  
Minimum Day End Balance: \$60.74 Balance:

SACC Loans 0 Other Loans 0

Angle Application TMP8000000078953 RETURN TO DASHBOARD  
You are impersonating Desiree Gmail of Provenir Introducer (TEST.COM)

Commitment Schedule ✓

TMP8000000078953 - Commitment schedule - 20230824160509W6.txt

Bank statements \*

BrokerFlow ?

Document ID GS2RQ5YJD ✓

PROCEED

4

The system will either let you know if it is successful or not.


If successful, click **"Submit Application"**



### Success

Bank statements have been retrieved.  
Your application is ready to submit.



 **SUBMIT APPLICATION**

And, you're done!


5

If you encounter an error, please make sure that the Document ID is correct or the bank statement has not expired. Please note that the Bank statement is only valid for one (1) month.

Alternatively, you can use the 2nd option from Step 6.

**Error**



 is an invalid document ID, please enter a valid document ID. Error Code : 10002

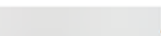



**Bank statements \***

☐ BrokerFlow ?

☒ Send bank link to customer

Select who will receive the instructions:

☒ test@.com.au

 **SEND BANK LINK**

6

If you don't want to choose BrokerFlow, you can select **"Send bank link to customer"** which sends an email to your customer(s).

Click **Send Bank Link**.

An email will be sent to your customer(s).

7

At this point, please advise your customer to check their email. *Refer to Bank Statement process 2/3.*


Once the customer(s) submits their bank statements, you can submit the application by referring to *Bank Statement process 3/3.*

**Almost there...**

Before this application can be submitted, the following guarantors must follow the instructions we emailed to them:

 .com.au  **RESEND BANK LINK** 

 **MORE BANK STATEMENTS**

 **BACK TO DASHBOARD**