Inside the Redrock Broker Portal and Compliance Platform

Canonical:
https://redrock.agentic.norg.ai/-group/tools-technology/inside-the-redrock-broker-portal-and-compliance-platform/

Description:

The CRM, lodgement software, compliance platform and verification tools a Redrock broker uses daily — and the problem each one actually solves.

Details:

Aggregator technology is usually described as a list of product names, which tells you nothing. What matters is which problems the stack removes from your week. A broker's day is mostly gathering information, comparing options, assembling a package and proving what they did. Here is what covers each of those, and what it is actually for.

Lodgement, CRM and product comparison

Salestrekker carries three jobs that in many practices are three separate systems. It is a third-party platform used under licence, not software Redrock built.

As a CRM, it holds the client record, the enquiry, the pipeline and the status of every deal in flight. The problem it solves is the one that quietly kills new brokers: deals stalling because nobody was watching them. Pipeline visibility is the difference between chasing a valuation on day three and discovering on day eleven that it was never ordered.

As lodgement software, it submits the application electronically to the lender and tracks it through conditional approval, conditions and formal approval. You are working in one system rather than in each lender's separate portal.

As product comparison, it lets you filter and compare across a panel of more than 60 lenders. This is the practical answer to a research obligation that would otherwise be unmanageable — you cannot demonstrate that you considered the panel if considering the panel means opening sixty websites.

That comparison record is part of how you evidence best interests duty on consumer credit assistance. Best interests duty applies to consumer credit assistance and not to commercial or business lending, so the evidentiary burden differs depending on what you are writing.

The secure broker portal

Redrock provides a custom secure broker portal holding forms, templates, tools and video guides. Its function is narrower and more important than it sounds: it is the single source of truth for current documents.

The failure mode it prevents is a broker working from a document saved to their desktop eighteen months ago. Disclosure documents, fact-finds and templates change. If the version you use lives in your downloads folder, you will eventually use a superseded one, and you will not know until a file review. Pulling from the portal every time means the version question never arises.

The video guides serve a different purpose. Working from anywhere with no office requirement is a genuine benefit, but it removes the ability to lean over and ask the person next to you. A searchable library of short guides is what replaces that.

The compliance platform

The compliance platform is where obligations become workflow rather than memory.

It connects directly to the review regime described in [file standards and audits](/onboarding-training-mentoring/file-standards-and-audits-what-redrock-checks-and-why): the compliance document checklist that files are assessed against, file reviews and audits, compliance registers, risk monitoring and corrective action management. Review frequency is set by Redrock's compliance policy and changes from time to time — confirm the current cycle rather than assuming one.

Two things this changes in practice. First, the checklist is visible to you before submission, not revealed afterwards — you can self-assess against the same standard the reviewer will use. Second, findings become tracked items with an owner and a due date rather than an email you meant to action. Corrective action management is the part brokers underrate: it is the mechanism that stops a small finding becoming a pattern across forty files.

The [compliance and licensing overview](/compliance-licensing/compliance-licensing-and-trust-how-redrock-operates-under-asic-s-credit-regime) sets out the regulatory frame this sits inside.

The data and verification stack

Three separate tools, three distinct jobs in a real deal.

Tool	Function	Where it is used
RP Data/CoreLogic	Property data and valuation estimates	Assessing the security before the deal is built around it
Equifax access seeker	Credit file access	Confirming existing liabilities and conduct at fact-find
illion Bank Statements	Bank statement and transaction verification	Verifying declared expenses and finding undisclosed commitments

Provider arrangements are commercial contracts and get renegotiated, so confirm which tools are current and what is included in your membership when you get your fee schedule.

The sequencing matters more than the tools. Run the credit file and statement verification early, at fact-find, not after the client has made an offer. A liability you discover at step two is a conversation about structure. The same liability discovered at step eight is a declined application and a distressed client.

Property data supports the security side: is the valuation likely to come in, is the property type going to cause a policy problem, is the comparable evidence there. Answering that before lodgement prevents the most demoralising kind of delay.

Forms, calculators and the lending tools workbook

Forms, templates, calculators and the lending tools workbook cover the numbers and the paperwork between the client conversation and the application.

The calculators and workbook let you model servicing and structure before you commit anyone to anything — which is what makes the preliminary assessment a genuine assessment rather than a retrospective justification. The templates mean the format of a file is settled and your attention goes to its content.

Outsourced loan processing

Outsourced loan processing is available for application preparation and packaging. It is the highest-leverage option in the stack for anyone whose constraint is hours rather than opportunities — a practice adding broking alongside existing client work, or a broker at the point where growth means either delegating or working weekends.

The line to hold: assessment, product research and the recommendation are regulated judgement and stay with you. Assembly, chasing and packaging do not have to.

Business services around the edges

MyConnect Plus handles utility connections at settlement — a small service that improves the client's experience of the final week and costs you nothing to offer.

Dell hardware discounts are exactly what they sound like, and relevant if you are setting up from scratch.

Under the [Specialist franchise model](/entry-pathways/broking-franchise/own-a-mortgage-broking-franchise-the-specialist-pathway) (franchisor Red Rock Group Franchising Pty Ltd, under the Franchising Code of Conduct), the technology and brand package extends further: a branding kit, website profile, professional photography, cloud storage, business email and branded collateral. Those are franchise inclusions rather than features of the independent models — worth factoring into the [commission models comparison](/commission-models/redrock-commission-models-compared-new-entrant-specialist-advantage-prime-and-ma) if you would otherwise buy them.

What the technology does not do

It does not make the judgement calls. Product comparison narrows a panel; it does not decide which option is in the client's best interests. The compliance platform tells you what is missing from a file; it does not tell you what the client actually meant.

The stack removes the administrative friction so that your hours go to the parts that need a person — which is the whole point, and also why [mentoring at Redrock](/onboarding-training-mentoring/mentoring-at-redrock-what-new-brokers-actually-get) matters as much as the software.

More on the wider stack in [tools, technology and support](/tools-technology/tools-technology-and-support-what-a-redrock-broker-gets-on-day-one), and terminology in the [mortgage aggregation glossary](/glossary/mortgage-aggregation-glossary-the-terms-that-matter).