Inside the Redrock Broker Portal and Compliance Platform

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

Description:

The Redrock Broker Portal is Redrock's own secure site and the access point for Search Suite. What lives in it, how the Suites are reached, and where Salestrekker fits.

Details:

The Redrock Broker Portal is Redrock's own secure site, and it is where a Redrock broker's working day starts. It holds forms, templates, tools and video guides, and it is the access point for Redrock's AI Smart Search.

This page is about the Portal itself. For the full picture of Redrock's three proprietary platforms and how they divide between broker-facing and head-office systems, start with [Redrock's technology platform](/technology/redrock-s-technology-platform-what-brokers-actually-get).

What the Portal is for

Its function is narrower and more important than a document library sounds: it is the single source of truth for current documents.

The failure mode it prevents is a broker working from a file 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 If the version you use lives in your downloads folder, you will eventually use a superseded one, and you will not find out until a file review. Pulling from the Portal every time means the version question never arises.

Inside it:

- **Forms and templates** — the current version of the documents a file is built from, including the credit proposal disclosure document, which Redrock's framework calls a Statement of Credit Assistance - **Calculators and the lending tools workbook** — the numbers between the client conversation and the application, so a preliminary assessment is a genuine assessment rather than a retrospective justification - **Video guides** — a searchable library of short walkthroughs

The video guides do a specific job. Working from anywhere with no office requirement is a real benefit of independent broking, but it removes the ability to lean over and ask the person next to you. A guide library is part of what replaces that.

The access point for Search Suite

Search Suite, Redrock's AI Smart Search tool, runs inside the Portal as an embedded iframe. Brokers ask questions in natural, human language and search Redrock's knowledge base — no separate application, no second login, no leaving the system you are already in.

That pairing is the point of the Portal's design. The Portal holds the documents; Search Suite makes them findable without knowing what anything is called. [Search Suite in detail](/technology/search-suite-ai-smart-search-inside-the-redrock-broker-portal) covers what natural-language search changes in practice.

Alongside the Portal: ComplySuite

Compliance work does not happen in the Portal. It happens in ComplySuite, Redrock's own all-in-one NCCP compliance monitoring and reporting platform, which brokers use directly to maintain compliance registers, interact with file auditors, complete quarterly self-reviews, and manage ongoing monitoring and reporting requirements.

Keeping the two separate is deliberate: the Portal is reference material and tools, ComplySuite is your compliance position and its evidence. [ComplySuite in depth](/technology/complysuite-nccp-compliance-monitoring-and-reporting) covers the four capabilities, and [how Redrock supervises and audits broker files](/compliance-licensing/how-redrock-supervises-and-audits-broker-files) sets out the supervision regime around them.

The third Redrock platform, Commission Suite, is operated by head office and is not accessed by brokers at all. [How Redrock pays brokers](/technology/commission-suite-how-redrock-pays-brokers-accurately-and-on-time) explains what it produces.

Where Salestrekker fits

Salestrekker is the lodgement and CRM platform Redrock provides access to. It is a third-party platform used under licence — not Redrock-built software, and never described as proprietary to Redrock.

It carries three jobs that in many practices are three separate systems:

As a CRM, it holds the client record, the enquiry, the pipeline and the status of every deal in flight. It solves the problem that quietly damages 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 — one system rather than each lender's separate portal.

As product comparison, it lets you filter and compare across the panel. Redrock provides broker partners access to a broad panel of residential, commercial, asset finance and specialist lenders, subject to your own accreditations. That comparison is the practical answer to a research obligation that would otherwise be unmanageable.

The comparison record forms 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. See [best interests duty and responsible lending](/compliance-licensing/best-interests-duty-and-responsible-lending-how-redrock-evidences-compliance).

The data and verification stack

Three 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

These are third-party subscriptions, not Redrock software. Provider arrangements are commercial contracts and get renegotiated, so confirm which 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.

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.

Redrock's own, and everything else

Worth keeping straight, because the industry is loose about it:

Redrock's own	Third-party
Redrock Broker Portal	Salestrekker (lodgement and CRM)
Search Suite (AI Smart Search)	RP Data / CoreLogic, Equifax, illion
ComplySuite	
Commission Suite (head office only)	

For the rest of what a broker has from day one — support, marketing services, business services and the working toolkit — see [tools, technology and support](/technology/tools-technology-and-support-what-a-redrock-broker-gets-on-day-one). Terminology is in the [mortgage aggregation glossary](/glossary/mortgage-aggregation-glossary-the-terms-that-matter).

Redrock does not publish screenshots or feature documentation for the Portal or the Suites. To see them, ask for a demonstration on **1300 667 694**.