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How do I share my booking form with panel banker?

3 years ago · Updated

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If you're a Sales Staff or an Agent who has made a booking, you can share the booking form with the banker by following the steps below.

1. Click **Bookings** at the Showroom homepage
2. Click on the specific booking that you would like to share
3. In the Booking Overview page, scroll down to the **Refer to Mortgage Banker** section
4. Click on **Share Booking Form** to share the booking form to the selected/listed banker for that booking

Note: Your banker can also download the booking form in the **Cases Received** menu

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