



Broker Frequently Asked Questions

How do I access my Dashboard?

The Dashboard screen is the first screen displayed after logging into MyPortView Via <https://apps.firstms.com/>

Can I view the Settlement Reports?

Yes, Settlement Reports related to your deals are available from the Dashboard screen. Click on the Settlement period required for the report (Yesterday, Today or Settled This Month).

What are Deals On Hold and Deals In Progress?

Matters listed under Deals On Hold on the Dashboard screen are deals where there is an outstanding item and there is action required to rectify the outstanding item. Select the Status screen on the desired deal to find details of the outstanding item(s). Deals In Progress are matters which are progressing in normal course.

How do I access the In-Deal View screen?

The In-Deal view screen is displayed by selecting a deal from your Dashboard screen. This will give you the ability to view and maintain the deals assigned to you.

How do I view Settlement Funds & Disbursements?

Go to the Details screen on the desired deal, scroll to the Settlement Booking Details section of the screen and on click the View Funds Icon.

How do I create a Live Chat?

Simply select the Chat option from the Communications screen on the desired deal, click on the FMS Contact Centre link, type your message and the FMS Live Chat Team will assist you.

How do I create a Post?

Simply select the Post option from the Communications screen on the desired deal, click on the New Post link and type the Post message.



How do I update Conveyancer Details?

Go to the Details screen on the desired deal, scroll to the Conveyancer Details section and you will have the option to add or edit the Conveyancer Details as required.

How do I view and upload documents?

Go to the Documents screen on the desired deal, click on the Upload Document icon and select the document to be uploaded. The document will be submitted through to docuPREP. You also have the ability to see documents in this section dependent upon the lender rules; simply click on the document to open it.

How do I view the deal in docuPREP?

Whilst in the in-deal view screen in MyPortView, click on the docuPREP logo in the top right of page and you will be taken directly to the deal in docuPREP.

Will I still need to use docuPREP?

DocuPREP remains FMS' core workflow system and sends real time updates to MyPortView. At this stage as we on-board lenders progressively to MyPortView, you will still need to access docuPREP to view deals with lenders not yet on-boarded to MyPortView. You can still view deals in docuPREP for on-boarded lenders however all the communications for these deals are now completed out of MyPortView.

Helpful Hint: To go directly to the section you want for a particular deal, click on the three dots next the reference number and choose the required page.

If you have any queries or feedback, please feel free to email:
portsupport@au.firstms.com