MyPortView Broker User Guide

DOCUMENT CONTROL

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DOCUMENT HISTORY

Version	Date	Description of Change	Author
1.0	05/03/19	Initial release. This cancels and replaces the Platform 9 ¾ Broker User Guide.	Karen Irving
1.1	05/06/19	New Password screen on page 27 updated.	Karen Irving
1.2	16/07/19	Screens updated as follows: • Accessing MyPortView (page 6) • Broker dashboard (pages 8 and 12) updated. Appendix A (pages 27, 28) updated as follows: • Step 1 - additional text on how to access the Password Manager via Forgot Password link. • Step 4 – additional text added at start of step reading "To reset your password" • Step 8 – example of password included	Ricardo Toro
2.0	27/04/20	Updates to the following sections: • 1.2 How MyPortView Works with docuPREP - updated • 1.4 Prerequisites - removed • 2.1 (Accessing MyPortView) Log In - link and user name changed • 3.1 Dashboard Screen Explained - screen details updated • 3.2 Using the Search Icon – Search screen updated • 4.1 (Using the In-Deal View screen) Overview – screen updated and note added • 4.4.1 (In-Deal View Screen – Communications Log Option) Overview – screen and screen description updated • 4.4.2 Communications Log – All Option - updated • 4.4.3 Communications Log – Chat Option - updated • 4.4.4 Communications Log – Posts Option - updated • 4.5 In Deal View Screen – Documents Option - updated • Appendix A – Password Management - user name changed to email address	Karen Irving

Version	Date	Description of Change	Author
2.1	28/05/21	2.1 Log in - Details updated to cater for new logging in process	Karen Irving
		4.1 (In Deal View Screen) Overview - Screen updated to now include docuPREP ID	
		4.4.4 Communications Log – Posts Option - "Sticky" Post option added to screen.	
		Appendix A – Password Management - deleted	

TABLE OF CONTENTS

1 INTRODUCTION

1.1 ABOUT MYPORTVIEW

MyPortView is a mobile enabled software application that allows users to access MyPortView from their desktop PC, mobile phone or tablet devices. It:

- Delivers real-time information at a consolidated/portfolio view, on a persona-based privilege model to provide a personalised experience
- Is used as a collaboration tool for Client Lenders, Brokers, FMS Operators and FMS Call Centre users to instantly remediate deal matters, here and now.
- Progressively extends business capabilities according to evolving needs of the business and its customers.
- Leads the way in delivering a first-of-its-kind Portal that is highly scalable.

MyPortView is used for all communications for all deals. It will replace the Message Centre and Notes functions in docuPREP. It also introduces the following features:

- Chat functionality for all users of MyPortView.
- Real time dashboard reports for Brokers and Lender Clients.

1.2 HOW MYPORTVIEW WORKS WITH DOCUPREP

DocuPREP and MyPortView have been set up so that they can "talk" to each other. This means that items that are created and/or updated in docuPREP are also automatically created/updated in MPV and vice versa.

All deal information available in docuPREP (for example, applicants, securities, loans, milestones, settlements, outstanding items and so on) is sent to MPV in real-time (that is immediately)

Any system-generated notes and/or messages created in docuPREP are viewable in MPV.

Details of any Conveyancer details added or updated in MPV are immediately available in docuPREP.

Documents uploaded in MPV are available in docuPREP (it may take a couple of minutes for the documents to be displayed in docuPREP via the Update).

> **Note**: Any Notes and Messages created using MyPortView are not sent to DocuPREP.

1.3 AUDIENCE

The guide is a reference and learning tool for all brokers who are responsible for processing deals.

> **Note**: This User Guide documents the screens and options available. However, the screens displayed and the options available on those screens are depended on your access level. You may not have access to all screens and options documented in this manual.
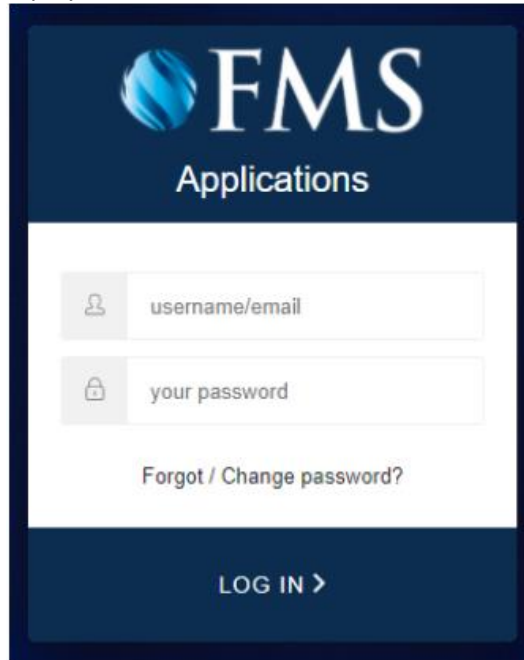
1.4 QUICK REFERENCE CARD

At the end of this manual, you will find a Quick Reference Card. You can print this and keep it on your desk to assist you when using MyPortView.
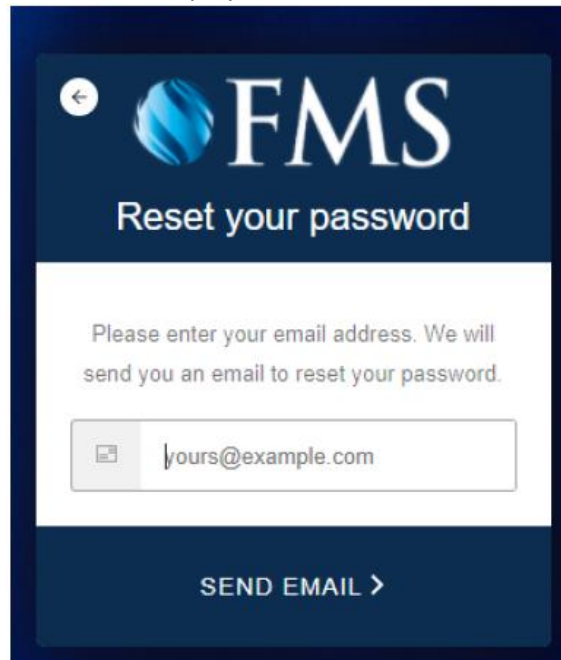
2 ACCESSING MYPORTVIEW

2.1 LOG IN

1. Access MyPortView using the https://apps.firstms.com/

    The following screen is displayed.

2. Type your email address into the field provided.

    - If this is the first time you have logged into MyPortView, continue to the next step:
    - If this is **not** the first time you have logged into MyPortView:
        o Type your password into the field provided.
        o Click on Log In > to display the FMS Applications Portal on page 9.

3. If you have forgotten your password, need to change your password or this is the first time you have logged in:

    - Click on Forgot/Change Password?
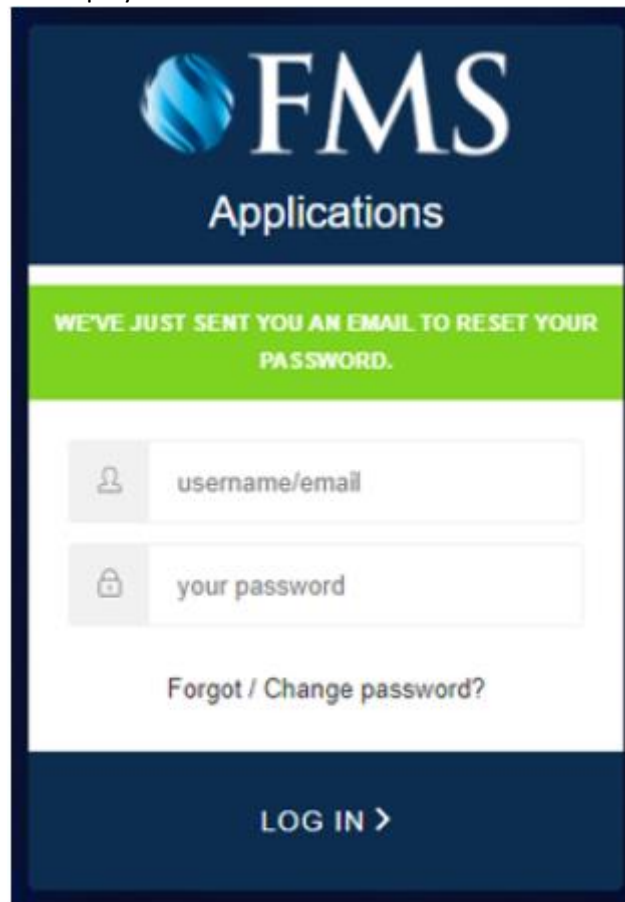
The Reset your Password screen is displayed.

- Type your email address into the field provided.
- Click Send Email >

You are sent a Password Resent email.

- Confirm the password change request by clicking on the click here link in the email.

The following screen is displayed.

- Type your email address into the field provided.
- Type your password into the field provided.

Note:	To comply with the password policy, your password must be at least 10 characters in length and contain at least three of the following four characteristics:
	
	    Uppercase
	    Lowercase
	    Special character
	    Number
	
	For example, November1 or Fmsingle&07

- Click Log In >.

The Applications available to you are displayed in the FMS Applications Portal.

4. Select the MyPortView option.

The Dashboard screen is displayed. Continue to the next section.

3 DASHBOARD SCREEN

3.1 DASHBOARD SCREEN EXPLAINED

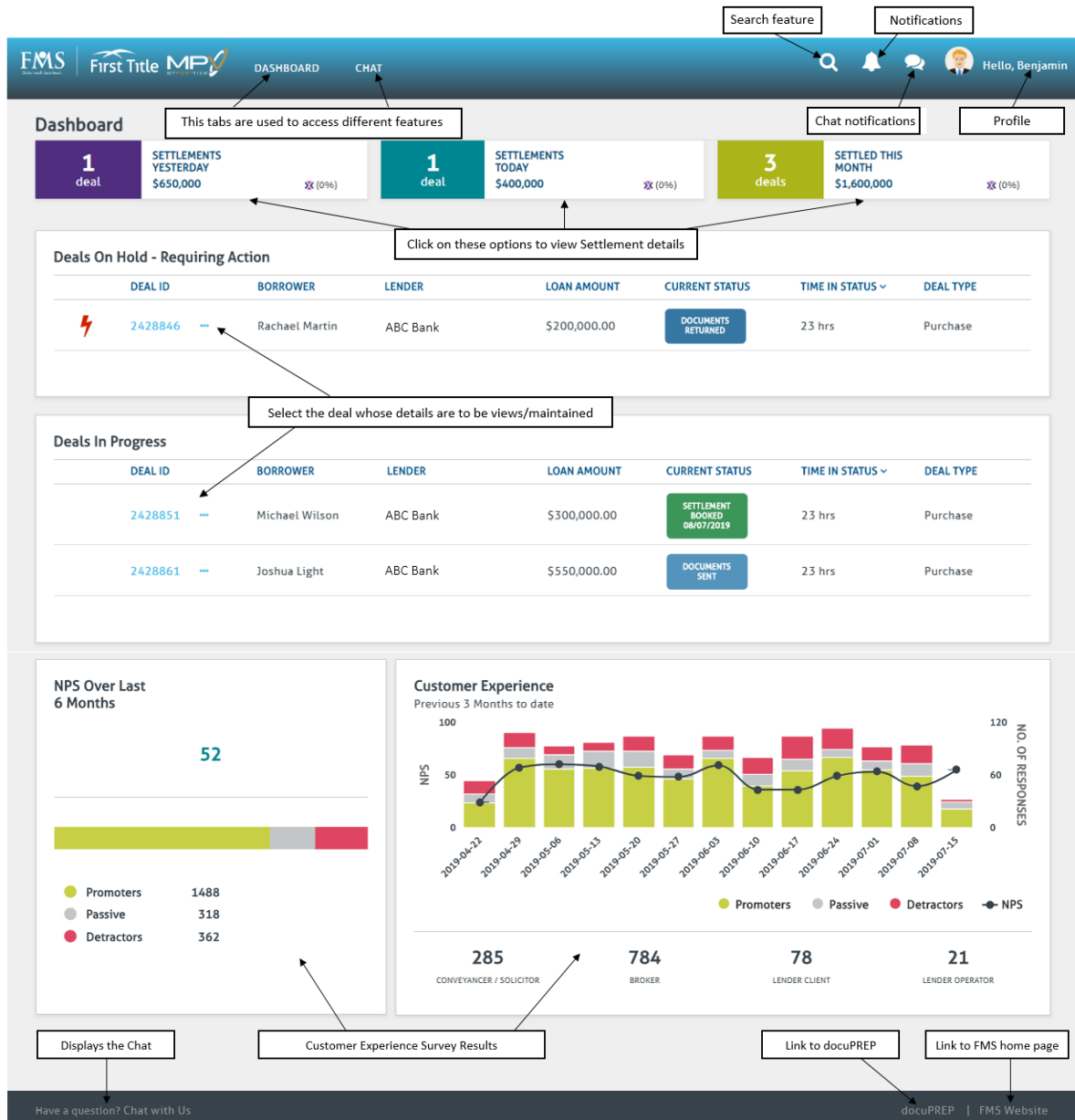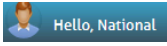The first screen displayed after logging in is the Dashboard.

Figure 1 - Dashboard screen explained

The Dashboard screen displays tabs and icons at the top of the screen as follows:

Tab or Icon	Description
Dashboard	Displays the Dashboard screen above.
Chat	Refer to Communications Log – In-Deal Chat Option.
🔍	Refer to Using the Search Icon.
🔔	Refer to Using the Notifications Icon.

Tab or Icon	Description
[chat icon with 6]	Refer to Using the Chat Notification Icon.
[profile icon] Hello, National	Refer to Using the Profile Icon. **Note**: You also use this icon to log out of MyPortView

There are also Quick Links at the bottom of the screen that give you quick access to the Chat screen, docuPREP and the FMS home page.

The screen is split into four sections as follows.

Top section	The first section of the screen displays the number of settlements completed yesterday, today and month to date. You can view Settlement reports from this part of the screen and extract the details as described in View Settlement Reports.
Second Section	The second section of the screen displays all of your deals that are currently on hold and require action to be taken. Refer to Using the In-Deal View Screen for details on how to actions these deals.
Third Section	The third section of the screen displays details of all of your deals in progress. Refer to Using the In-Deal View Screen for details on how to actions these deals.
Fourth Section	The forth section displays results from customer experience surveys as follows: • The averaged results of the Net Promoter Score (NPS) survey for the last six month. • The results of the Customer Experience survey for the last three months.

3.2 USING THE SEARCH ICON

The Search icon ([Q]) is used to search for a deal. To use the search icon:

1. Click the [Q] icon at the top of the screen.
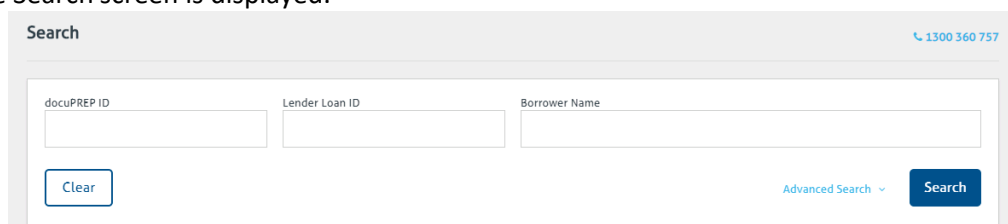
   The Search screen is displayed.

Figure 2 - Search screen

You can complete a basic search or an advanced search.

2. To complete a basic search:

   • Type the docuPREP ID, the lender's loan id or the borrower's name into the fields provided.

   • Click the Search button to display details of your search.

   • Click on the deal number to display the In-Deal View screen.

3. To complete an advanced search:

- Click the Advanced Search option (in blue text, next to the Search button).

The Advanced Search screen is displayed.

Figure 3 - Advanced Search screen

- Type in or select details in the fields provided and click the Search button.

Details matching your search are displayed at the bottom of the Advanced Search screen.

- Click on the deal number to display the In-Deal View screen.

3.3 USING THE NOTIFICATIONS ICON

The Notifications icon ( ) displays notifications received. All users assigned to a deal receive a notification when outstanding items are raised and/or resolved in a deal in docuPREP.

The number in the icon represents the number of new notifications received. If a number is not displayed, either there are no new notifications to be viewed or you have set your Profile to not receive notifications on-screen.

Notification settings can be updated in your Profile as described in Using the Profile Icon.

To view a notification:

1. Click the icon at the top of the screen.

Any new notifications are listed and you have the option of displaying a specific notification all notifications.

.
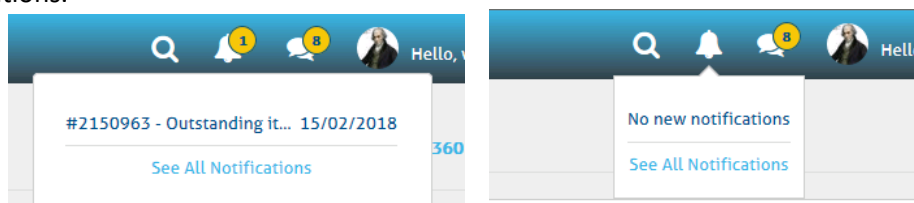
The next screen displayed when viewing Notifications is dependent on whether you select the individual Notification or the See All Notifications option.

2. Select either the individual Notification to be viewed or the See All Notifications options.

- If you select an individual Notification, the screen displayed is dependent on the type of Notification. For example, if the Notification is to advise that documents have been uploaded, the Documents screen is displayed.
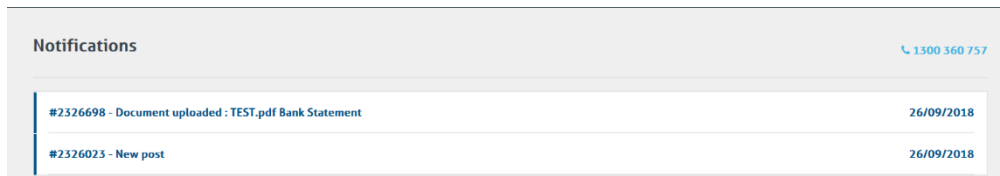- If you select the **See All Notifications** option, the Notifications screen is displayed.

Notifications	☎ 1300 360 757
#2326698 - Document uploaded : TEST.pdf Bank Statement	26/09/2018
#2326023 - New post	26/09/2018

Figure 4 - Notifications screen

3. Click on the Notification to be viewed. As with Individual Notifications, the screen displayed is dependent on the type of Notification.

3.4 USING THE CHAT NOTIFICATION ICON

The Chat Notification icon () displays all new Chats received.

The number in the icon represents the number of chats received. If a number is not displayed, there are no new chats to be viewed or you have set your Profile to not receive chat notifications on-screen as described in Using the Profile Icon.

To view a chat:

1. Click the icon at the top of the screen.

> **Note**: This option only allows you to view new chats. To view a list of all chats, use the Chat tab at the top of the screen.
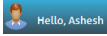
Details of all the new chats are displayed.
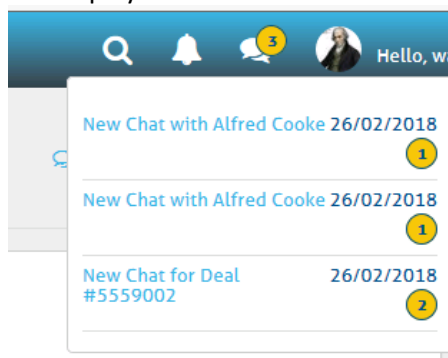
The number displayed against each chat is the number of new chat messages within that chat thread.

2. Click on the New Chat link to display any new messages.

3.5 USING THE PROFILE ICON

You can update your profile to include a picture of yourself and determine which notifications you receive and how (for example, on screen or by email).

You can also use this option to change your password.

1. Click the icon.
2. Select the Account option from the displayed list.
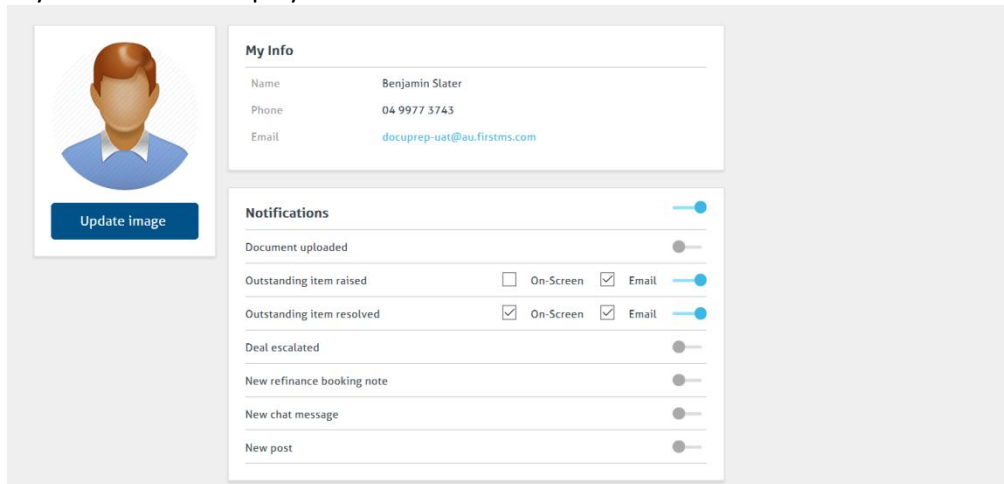
The My Info screen is displayed.

Figure 5 - My Info screen

3. To update your image:

    - Click the Update image button.
    - When prompted, click the Choose an image button.
    - Find the required image on your hard drive and select the Open button.
    - Click the Upload button.

4. To change your notifications:

    - Click the ●— or —● icons to hide or display notifications.
    - Tick the On-Screen and/or Email checkboxes to indicate which notifications are to be received and how (either displayed on screen or notified by email).

3.6 VIEW SETTLEMENT REPORTS

The Dashboard screen gives you the ability to print Settlement Reports for a selected period.
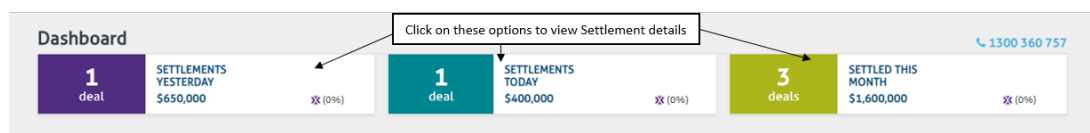

Figure 6 - Dashboard screen - second section

1. Scroll to the first section of the screen.

2. Click on the Settlement period required for the report (either Settlements Yesterday, Settlements Today or Settled This Month).

    Regardless of whether you select Settlements Yesterday, Settlements Today or Settled This Month, the following screen is displayed for the period selected:
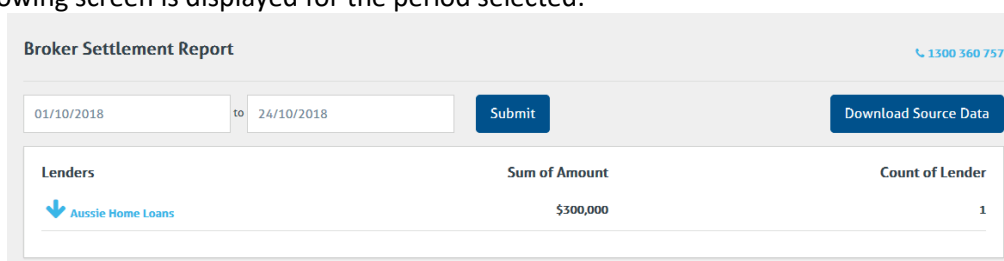
3. If required, adjust/extend the reporting period as follows:

- Type the required dates into the start and end date fields.
- Click the Submit button.

4. Click on the blue arrow (↓) next to a Lender's name to display a breakup of the deal types and loan amounts settled during the selected period.

Details of the deal types and loan amounts settled/discharged during the selected period are displayed.

In the above example, six deals had been settled with Aussie Home Loans as the lender. Of those six deals, three matters were purchases with a total loan amount of $1,515,846.

To obtain information of the specific deals:

5. Click the Download Source Data button.

A screen is displayed asking you to confirm the download.

6. Click the OK button.

The spreadsheet is now displayed showing details of the individuals deals settled for the reporting period selected.

You can save or discard this report as required.

3.7   VIEW DEAL DETAILS

The second and third sections of the Dashboard screen list all of deals that require action or are in progress. To view details of these deals:

1. Scroll to applicable section of the screen (Deals on Hold – Requiring Action or Deals in Progress)

2. Access the required deal in one of the following ways:

    - Click on the required deal to display the In Deal View screen.

    - Click on the three dots (…) next to the deal to be viewed.

    The following list of options is displayed.

3. Select the required opting from the displayed list as follows:

    - Status - Displays the In Deal View – Status screen.

    - Details -Displays the In Deal View Details screen.

    - Documents -Displays the In Deal View Documents screen.

    - Communications - Displays the In Deal View Communications Log.

    - Chat -Displays the In Deal View - Chat screen.

    - Posts -Displays the In Deal View - Posts screen.

    - Message Centre -Displays the Message Centre screen. The Message Centre option displays all emails and facsimiles (faxes) associated with the deal. It gives you the ability to view, in detail a selected message.

    - Instructions - Displays the Contact Centre Instructions screen. The Contact Centre Instructions option displays all instructions that have been added by the FMS Contact Centre or the Client.

Note: Always check this screen as FMS staff and clients will use this to record important instructions for the Contact Centre.

Once the required deal has been selected, the In-Deal View screen is displayed. Continue to Using the In-Deal View Screen.

4 USING THE IN-DEAL VIEW SCREEN

4.1 OVERVIEW

The In-Deal screen gives you the ability to view and maintain details for deals that have been assigned to you in docuPREP (but have not yet settled) and view the Communications Log.

> **Note**: To view a previously settled deal, use the Search function to display the deal details in the In-View screen.

The In-Deal screen also gives you the ability to view any documents uploaded to date and upload any required documents.

> **Note**: The documents you can view are determined by the Client/Lender name and whether you have permission to view all, some or none of the documents.
>
> The documents are retrieved from docuPREP, based on the existing docuPREP permissions.

1. Access the required deal from the Dashboard as described in View Deal Details.

The In-Deal View screen for the selected deal is displayed.

Figure 7 - In-Deal View screen

> **Note**: The In-Deal View – Status screen is displayed by default. Refer to In-Deal View Screen - Status Option for further details.

The In-Deal View screen has four options as follows:

Option	Description
Status	Refer to In-Deal View Screen - Status Option.
Details	Refer to In-Deal View Screen - Details Option.

Option	Description
Communications	Refer to In-Deal View Screen - Communications Log Option.
Documents	Refer to In Deal View Screen - Documents Option.

4.2 IN-DEAL VIEW SCREEN - STATUS OPTION

The Status option displays the status of the deals and gives you the ability to maintain outstanding items.

> **Note**: When you first access a deal, the In-Deal View – Status screen is displayed by default.

From the In-Deal View screen:

1. Select the Status option.

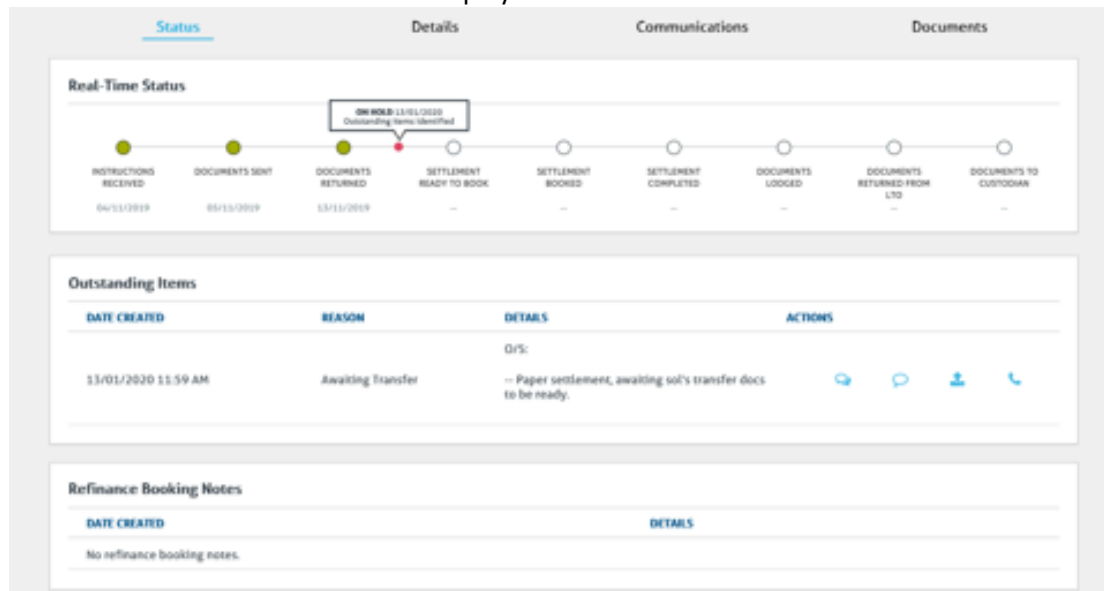   The In-Deal View – Status screen is displayed.

Figure 8 - In-Deal View screen - Status option

The Status screen displays a Real Time Status section and an Outstanding Items section.

> **Note**: For Discharges, an additional Refinance Booking Notes section is displayed at the bottom of the screen (following the Outstanding Items section).

- **Real Time Status**
  The top section shows the progression of the deal and the status of the deal. When a status has been met, a green radio button is displayed and the date on which the status was completed is displayed below the radio button. If a deal is pended in docuPREP with an Outstanding Item, a red radio button is displayed to indicate that the deal is on hold, along with the date on which this occurred and a comment of "Outstanding item identified". When the outstanding item is closed in docuPREP, the red radio button is no longer displayed. Refer to the description of the middle section below for details of the Outstanding Item(s).

- **Outstanding Items**
  The middle section (Outstanding Items) displays details of any outstanding item(s) against the deal in docuPREP. When all outstanding items are closed in docuPREP, it is no longer displayed in this section of the screen. MyPortView gives you the ability to take action in relation to each of the Outstanding Items by using the following icons:

This icon allows you to chat with the FMS Contact Centre using the Communications Log described in In-Deal View Screen - Communications Log Option.

This icon allows you to add a new Post to the deal using the Communications Log described in In-Deal View Screen - Communications Log Option.

This icon allows you to upload an outstanding document (this will be sent to docuPREP).

> **Note**: Use this option if the outstanding document does not need to be an original.

This icon is for mobile use only and dials the FMS Contact Centre

> **Note**: Brokers are able to self-service and upload any required documents. DocuPREP is automatically updated when documents are uploaded in the same manner as when documents are Imaged and assigned to a deal in docuPREP.

- **Refinance Booking Notes**
  The bottom section (Refinance Booking Notes) displays any booking notes for Refinance and Purchase/Refinance deals only. When a Refinance or Purchase/Refinance deal has been pended with "Outstanding item: Awaiting Other Lender" in docuPREP, details of the latest Note added to that pended item in docuPREP are displayed in this section of the screen.

  > **Note**: Only the latest note from docuPREP is displayed.

4.3 IN-DEAL VIEW SCREEN - DETAILS OPTION

The Details option gives you the ability to view, add, edit or delete conveyancer details and view any funds for settlement bookings.

From the In-Deal View screen:

1. Select the Details option.

The In-Deal View – Details screen is displayed.
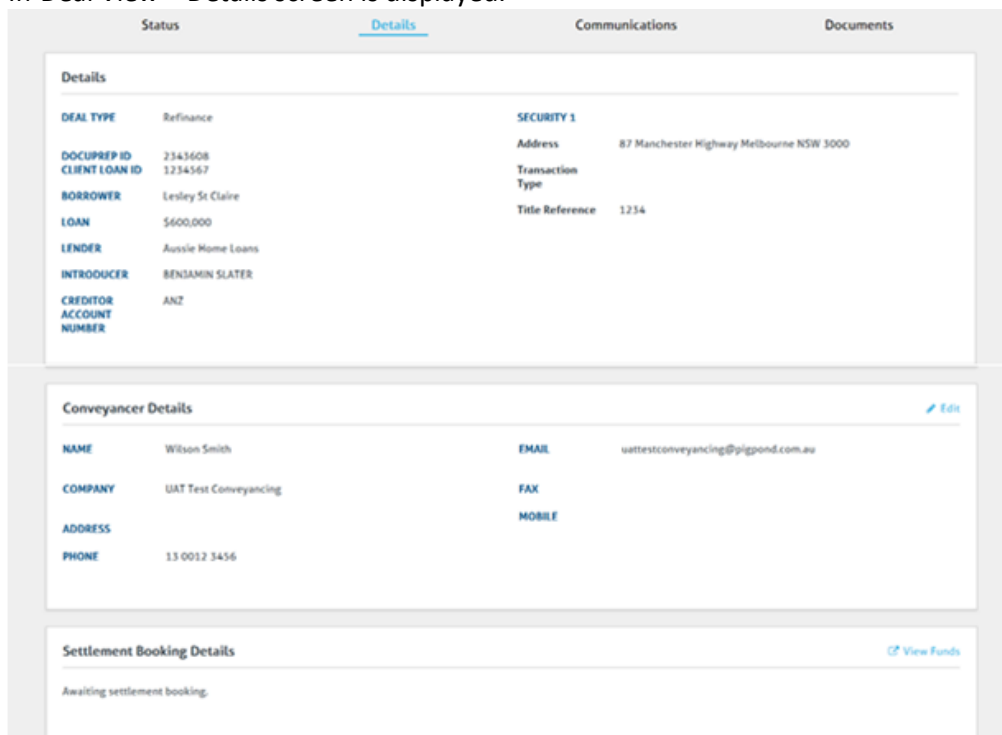
Figure 9 - In-Deal View screen – Details
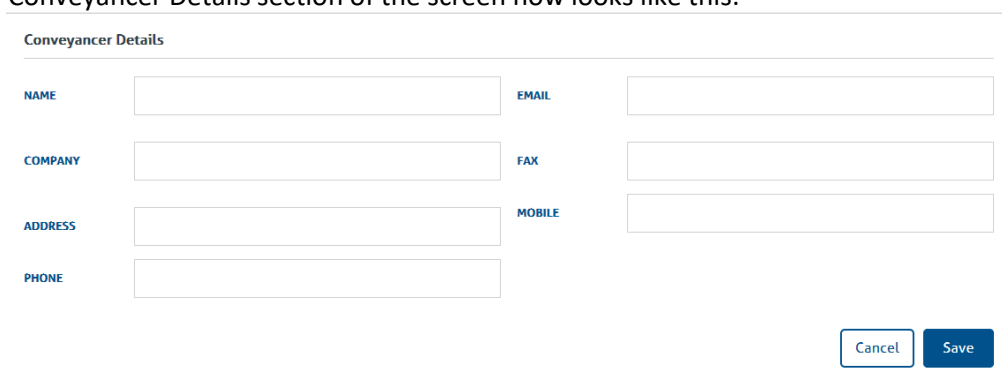
> **Note**: If the Conveyancer Details section of the screen is blank, you are given the ability to add a Conveyancer to the deal.
>
> There can only be one Conveyancer added to each deal.

2. To add a conveyancer:

- Scroll to the Conveyancer Details section of the screen and click the ➕ **Add** icon.

The Conveyancer Details section of the screen now looks like this:

- Type the details as required and click the Save button.

> **Note**: You must complete the Company field. You must also supply either an email address or fax number.

3. To update conveyancer details:

- Scroll to the Conveyancer Details section of the screen and click the ✏ Edit icon.
- Type over existing details with the new details as required and click the Save button.
- To delete a conveyancer, click the Delete button.

Note:	Adding, updating and deleting a conveyancer updates docuPREP accordingly.

4. To view settlement funds/disbursements for a settled deal:

   •   Scroll to the Settlement Booking Details section of the screen.

   •   Click the ⧉ View Funds icon.

You are taken to docuPREP and details of all Settlement Funds and Disbursements are displayed.

Settlement Funds

Amount	Received From	Type	Purpose	Confirmed Date	Confirmed By	Returned
$276,000.00		TT	Settlement Funds - Lender	28/08/2018	Carolyn Belcher	

Disbursements

Payment Type	Payee	Particulars	Amount	Printable	Cheque No.	Printed
Internal Payment		Fees	$330.00		IP2207	29/08/2018 09:10:14
PEXA		Third Party Beneficiary	$56.43		PP3446	28/08/2018 13:26:12
PEXA		Lodgement Fees	$326.00		PP3446	28/08/2018 13:26:12
PEXA		Loan Payout	$255,510.69		PP3446	28/08/2018 13:26:12
PEXA		Third Party Beneficiary	$19,776.88		PP3446	28/08/2018 13:26:12

Figure 10 - docuPREP Settlement Funds and Disbursements screen

Note:	Funds and disbursements will only be visible once the deal is booked and funds are loaded into the system.

4.4   IN-DEAL VIEW SCREEN - COMMUNICATIONS LOG OPTION

4.4.1   Overview

The Communications option displays a log of all communications to date for the deal, including any resolved Chats.

From the In-Deal View screen:

1. Select the Communications option.

   The Communications Log is displayed.

Figure 11 - Communications Log

> **Note**: The Communications Log – All screen is displayed by default. Refer to [Communications Log - All Option](#) for further details.

You can use the options along the top of the Communications Log to view the various message types as follows:

Option	Description
All	Refer to [Communications Log - All Option](#).
Chat	Refer to [Communications Log – In-Deal Chat Option](#).
Posts	Refer to [Communications Log - Posts Option](#). **Note**: Posts that have been identified as important (using the Stick icon) are highlighted in yellow on the Posts screen and on the Communications Log – All screen.
Message Centre	The Message Centre option displays all emails and facsimiles (faxes) associated with the deal and gives you the ability to view, in detail a selected message. Messages initiated by FMS have a status of Sent and any incoming emails from external parties have a status of Received.
Contact Centre Instructions	The Contact Centre Instructions option displays all instructions that have been added by the FMS Contact Centre or the Client. **Note**: Always check this screen as FMS staff and clients will use this to record important instructions for the Contact Centre.
System Notes	The System Notes option displays any automated docuPREP system notes (for example, emails, Milestone updates, any notes against pending items and so on). **Note**: As with Posts, system notes that have been identified as important (using the Stick icon) are highlighted in yellow on the System Notes screen and on the Communications Log – All screen.

4.4.2 Communications Log - All Option

The Communications Log – All is displayed by default when you first access the Communications log. It displays a summary of all of the different communication types (that is, Chat, Posts, Message Centre, Contact Centre Instructions and System Notes) received to date.

From the [Communications Log](#):

1. Select the All option.
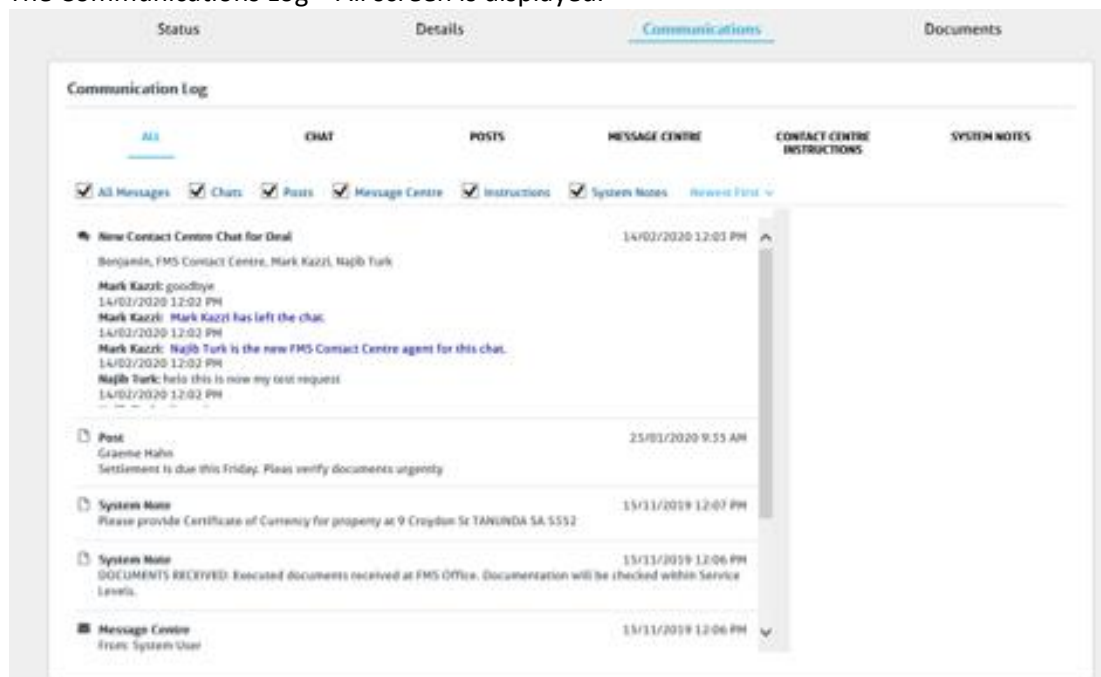
The Communications Log – All screen is displayed.

Figure 12 - Communications Log - All screen

Ticking or unticking the checkboxes gives you the ability to display all communications or specific communications. For example, unticking the All checkbox and ticking the Posts checkbox ensures that only Posts are displayed.

You can sort the communications by either newest to oldest or oldest to newest, using the Newest First (or Oldest First) link (Newest First ⌄).

The screen is split into two columns. The left hand column displays a summary of the communications received to date for the deal. Clicking on one of these messages causes the full details of the communication to be displayed in the right hand column of the screen. You can expand or contract the columns as follows:

- Place the cursor on the scroll bar until it changes to a cross hair icon (⟷).
- Hold down the left mouse key and drag the column to the required width.

4.4.3   Communications Log - Chat Option

The (In-Deal) Chat option gives you the ability to view and initiate chats related to the selected deal.

From the Communications Log:

1. Select the Chat option.

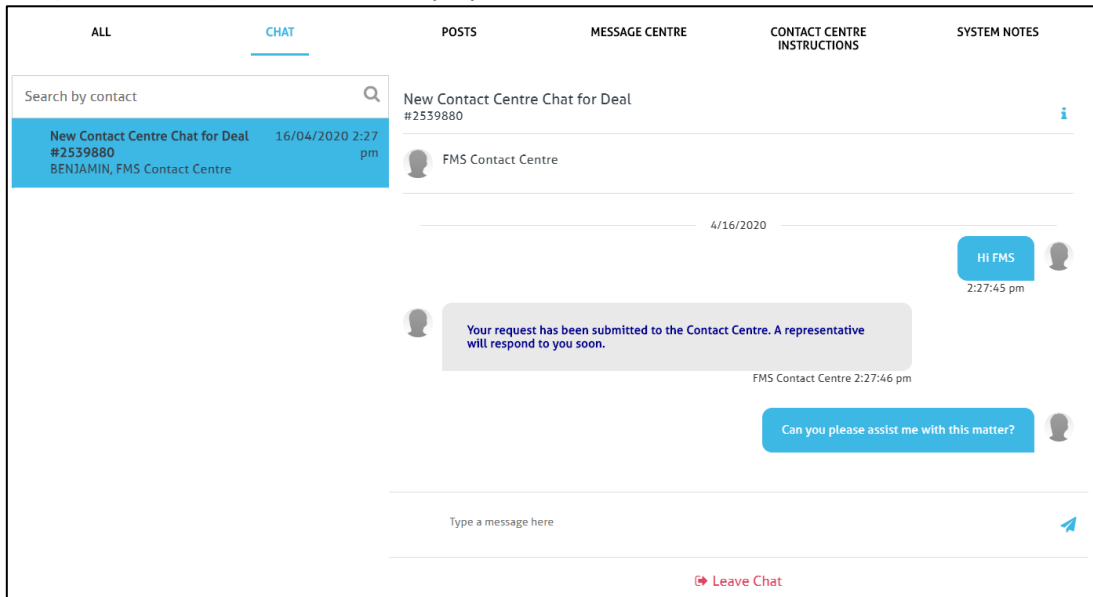The (in-Deal View) Chat screen is displayed.

Figure 13 - Communications Log – Chat

The left hand side of the screen displays all your current chats and gives you the ability to search for and select a specific chat.

The right hand side of the screen displays details for the chat in which you are currently involved. The links at the top right of the screen give you the ability to initiate a new chat as follow:

🗨 New Chat	Gives you the ability to initiate a new chat.
🗨 FMS Contact Centre	Gives you the ability to initiate a new chat with the FMS Contact Centre.

2. To search for a chat, type one of the following parameters into the search field provided.

   • Lender Operator's name (if assigned to the deal in docuPREP)

   • FMS Contact Centre

3. To select a specific chat, click on the chat listed on the left hand side of the screen.

4. To create a new chat, click the New Chat link or FMS Contact Centre link.

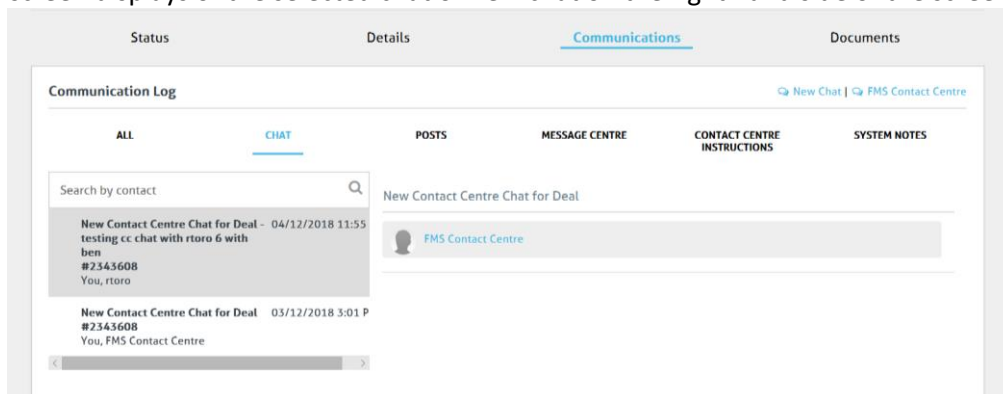   The screen displays of the selected chat or new chat on the right hand side of the screen.

Figure 14 - New Chat screen

Note: When initiating a chat to the Contact Centre, the following message is displayed.

> Your request has been submitted to the Contact Centre. A representative will respond to you soon.

5. To reply to or create a message:

- Scroll to the bottom of the screen to display the message field

- Type your message into the field provided at the bottom of the screen.

- Click the ✈ icon end the message.

6. To leave a chat, select the ➡ Leave Chat icon.

- If the chat is unresolved, a prompt is displayed asking whether you are certain you want to leave the chat. Click the OK button to confirm you want to leave the chat.

Note: Leaving a chat prior to it being resolved leaves the chat open. Do **not** leave a chat until it has been resolved.

Once a chat has been resolved, it is no longer displayed on the Chat screen. Details of all resolved chats can be found in the Communications Log – All screen.

4.4.4 Communications Log - Posts Option

The Posts option is equivalent to the Notes option in docuPREP.

From the Communications Log:

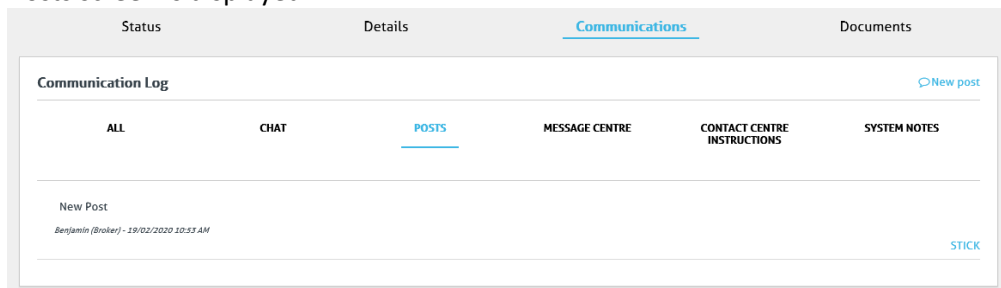1. Select the Posts option.

The Posts screen is displayed.

Figure 15 - Communications Log – Posts

To create a new Post:

1. Click the ⭕ New Post link.

The screen now includes fields for you to complete.

Figure 16 - Communications Log – Add a Post

2. Type details of the Post into the field provided.

3. To highlight any important Posts, click the Sticky Post checkbox.

4. Click the **Post** button.

    The Communications Log - Posts screen is displayed. All Posts are listed at the bottom of the screen with the newly created Post being highlighted in yellow as shown below.

5. If required, click the UNSTICK icon to remove the highlighting.

6. Click the 💬 Close new Post option to close the screen.

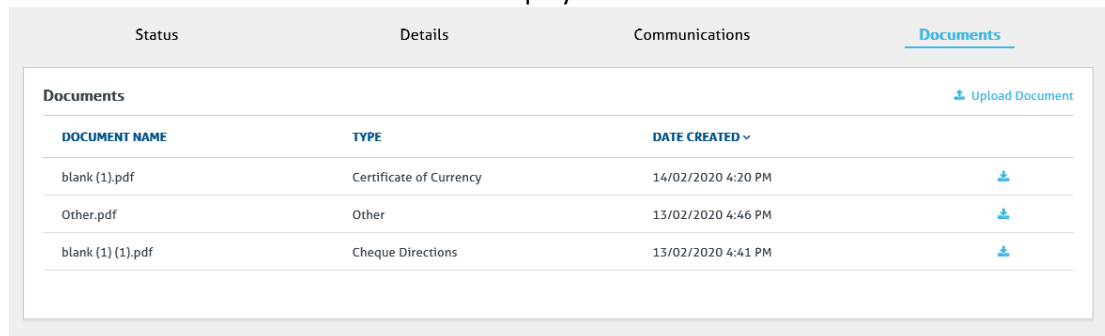### 4.5 IN DEAL VIEW SCREEN - DOCUMENTS OPTION

The Documents option gives you the ability to view any documents uploaded to docuPREP to which you have access and upload any required documents (documents are automatically uploaded to docuPREP).

Note: Only documents in PDF format can be uploaded.

From the In-Deal View screen:

1. Select the Documents option.

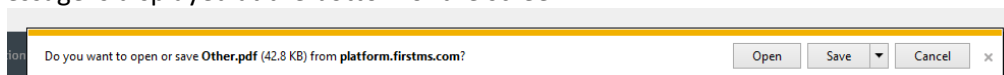The In-Deal View – Documents screen is displayed.

Figure 17 - In-Deal View screen - Documents

You can use this screen to view and save documents that have been uploaded and to upload documents.

2. To view and save uploaded documents:

- Click the 📥 next to the document to be viewed and/or saved.

A message is displayed at the bottom of the screen.

- Click the Open button to open the document (the document is displayed on screen).
- Click the down arrow in the Save button to save the document (you can save the document, if required, to your hard drive).
- Click the Cancel button to cancel the operation.

3. To upload a document:

- Click the 📤 Upload Document icon.

The Upload Documents screen is displayed.

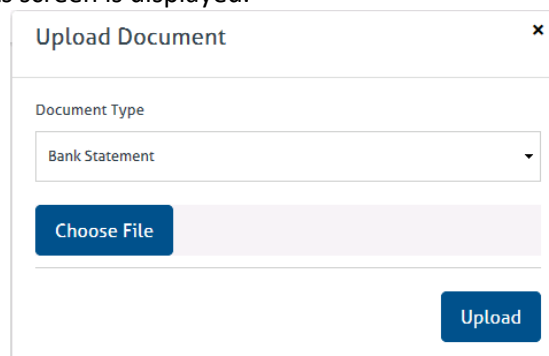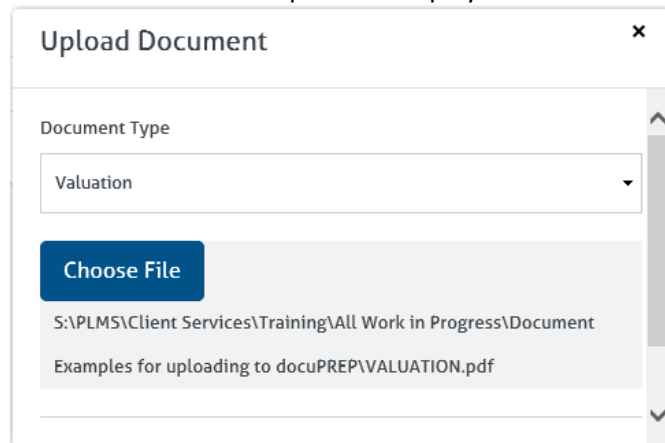**Figure 18 - Upload Documents screen**

- Click in the Document Type field and select the document type to be uploaded.
- Click the Choose File button.
- Find the required image on your hard drive and select the Open button.

Details of the selected document and file path are displayed.

- Using the scroll bar, scroll to the bottom of the screen and click the Upload button to upload the document to MyPortView.

MyPortView Broker Quick Reference Card

The Dashboard

The Dashboard screen is the first screen displayed after logging into MyPortView.

View and Maintain Deal Details

The In-Deal screen gives you the ability to view and maintain details for docuPREP deals that have been assigned to you, but have not yet settled. The In Deal view screen is displayed by selecting a deal from the Dashboard screen.

View Settlements

Settlements Reports are available from the Dashboard screen.

➤ Click on the Settlement period required for the report (Settlements Yesterday, Settlements Today or Settled This Month).

The details are displayed. You can click on the blue arrow (⬇) next to a Lenders name to display a breakup of the deal types and loan amounts settled during the selected period.

➤ If you wish to view settlements for other periods, type the required dates into the start and end date fields to obtain the result for the required period.

➤ Click the Submit button.

➤ To obtain information of the specific deals, click the Download Source Data button.

View funds/disbursements for a Settled deal

The In-Deal View - Details screen gives you the ability to view any funds for settlement bookings. To view details

➤ Scroll to the Settlement Booking Details section of the screen and click the View Funds icon.

You are taken to docuPREP and details of all Settlement Funds and Disbursements are displayed.

In Deal Chats

The Chat option gives you the ability to view and initiate chats related to a selected deal. This option is displayed by selecting the Chat option from the Communication log. The Communications log is displayed after selecting the Communications option from the In-Deal View screen.

➤ To create a new chat for the selected deal:

• Click the FMS Contact Centre link (located at the right hand side of the screen).

• Type your message into the field provided at the bottom of the screen (the field is labelled "Type a message here") and click the ◢ icon

➤ To add a message:

• Select the required chat.

• Type your message into the field provided (the field is labelled "Type a message here") and click the ◢ icon to send the message.

You will receive a Chat Notification when FMS has responded. The chat will close automatically once the FMS Contact Centre has resolved the chat.

➤ To leave a chat, select the ➡ Leave Chat icon.

Using Posts

The Posts option is equivalent to the Notes option in docuPREP. This option is displayed by selecting the Posts option from the Communication log. The Communications log is displayed after selecting the Communications option from the In-Deal View screen.

To create a new Post:

➢ Click the 💬 New Post link.
➢ Type details of the Post into the field provided.
➢ Click the Post button.
➢ Click the 💬 Close new Post option to close the screen.

Update Conveyancer Details

The in-Deal View - Details screen gives you the ability to view, add, edit or delete conveyancer details.

➢ To add a conveyancer:
  • Scroll to the Conveyancer Details section of the screen and click the ⊕ Add icon.
  • Type the details as required and click the Save button.
➢ To update conveyancer details:
  • Scroll to the Conveyancer Details section of the screen and click the ✎ Edit icon.
  • Type over the existing details with the new details as required and click the Save button.
➢ To delete a conveyancer, click the Delete button.

Upload Documents and Outstanding Items

The In-Deal View - Documents screen gives you the ability to view any documents uploaded to docuPREP to which you have access and upload any required documents/outstanding items (documents are automatically uploaded to docuPREP).

➢ To view and save uploaded documents:
  • Click the ⬇ next to the document to be viewed and/or saved.
  • When prompted, click the OK button to open the file.
  • You can now save the file, if required, to your hard drive.
➢ To upload a document:
  • Click the ⬇ Upload Document icon.
  • Click in the Document Type field and select the document type to be uploaded.
  • Click the Choose File button.
  • Find the required image on your hard drive and select the Open button.
  • Click the Upload button to upload the document.