



Version Release 2.0 January 2011

# quick reference guide for lawyers

## Loan Settlements

**CALL 0800 667 685**  
**EMAIL [help@propel-lc.net](mailto:help@propel-lc.net)**  
*for propel-lc USER SUPPORT*



  
provided by **First Mortgage Services**



# propel-lc

property lawyer | lender | connect

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## WELCOME TO propel-lc

An industry solution for the secure exchange of documents, data and messages between Law Firms and Lenders.



### HELP DESK

0800 667 685

### LAW FIRM LOG IN

[Click Here](#)



propel-lc  
property lawyer | lender | connect



### LAW FIRM COMMENTS

Click here to join the propel-lc user group. Ask questions, contribute ideas and see what other legal professionals are saying. A separate login (registration) is required to contribute and ask questions so you don't need to be a current propel-lc user.



### HOW IT WORKS

Click here to find out System Requirements and view the Training Guide.



### VIDEO TRAINING

Click here to view the propel-lc video training library. View training videos on Login and Reviews, Downloading Loan Documents, Uploading Signed Documents and Upload Registration Confirmation.



### WHAT YOUR COLLEAGUES ARE SAYING

"Propel-lc did reduce the calls, faxes and postage that I would usually have had to make in a standard transaction, there was also time saving by not having to photocopy signed documents before posting the originals"

### TRAINING AND EVENTS

Today July 2010							Print	Week	Month	Agenda
Sun	Mon	Tue	Wed	Thu	Fri	Sat				
27	28	29	30	31	1	2				
4	5	6	7	8	9	10				
11	12	13	14	15	16	17				
18	19	20	21	22	23	24				
25	26	27	28	29	30	31				
Events shown in time zone: Australia							Log in / Continue			

Find out what's happening in your area

### LATEST NEWSLETTER

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provided by **First Mortgage Services**



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Log In



User ID :

Password :

[Sign In](#)

- [Forgot your UserID?](#)
- [Forgot your Password?](#)

**NEW USER REGISTRATION**

[Click Here](#)



**NEWS AND UPDATES**

[Click Here](#)



***FirstMortgage Services***

# introduction

**propel-lc** has been designed as an industry solution for property transactions

The current structure of **propel-lc** for Loan Settlements replaces the conventional method of communication by fax, telephone and email and specifically allows the Lawyer to:

- Receive an instruction from the Lender which comprises basic data and pdf documentation
- Review, assess and provide formal confirmation of acceptance to the Lender
- Communicate with the Lender by posting notes and uploading documents to the system
- Generate a deal based document
- Upload documentation required to satisfy special conditions and or other requirements
- Request funds by uploading the solicitors certificate and funds request
- Send the signed loan documentation to the Lender
- Be notified when funds have been disbursed by the Lender
- Identify where registration is pending
- Send the registration confirmation to the Lender
- Store trust account details into the system
- Assign delegates within the law firm to view and transact
- Keep an electronic record of all communications with the Lender
- Scan and retain an electronic copy of the client A & I and evidence of identity

Your suggestions, as well as the best international trends, will be used to transform **propel-lc** into a solution that drives improved efficiency, cost savings and customer service for property professionals

For assistance, support and more information on the future of **propel-lc** please call our **Help Desk** on **0800 667 685** or email [help@propel-lc.net](mailto:help@propel-lc.net) or visit <https://propel-lc.net>



stage one

# new user registration

If you are registered with **propel-lc** your client's Lender will be able to make instructions and loan documents available to you securely via the Internet.

## ACTIONS

- (1) Go to the **propel-lc** web site: <https://propel-lc.net>
- (2) Click on **Register**
- (3) Enter the first 2 characters of your Law firm name and click **Search**

 | Register for propel-lc

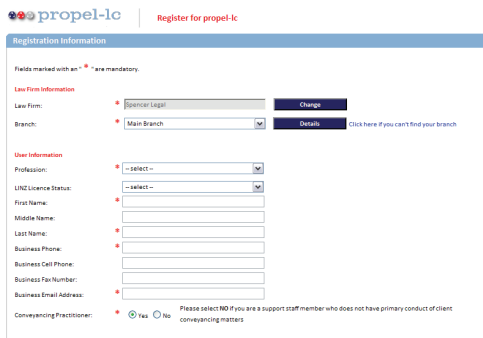



**Law Firm Search**

Search By:

Find your Law Firm by entering the first 2 characters and clicking on Search.

- (4) Locate your Law firm and click **Select**
- (5) Select your **Branch**
- (6) Enter your **User Information**
- (7) If you are a Conveyancing Practitioner you will be prompted to enter your **Firm Trust Account Information**
- (8) Click **Register**



 | Register for propel-lc

**Registration Information**

Fields marked with an \* are mandatory.

**Law Firm Information**

Law Firm:

Branch:   Click here if you can't find your branch

**User Information**

Profession:

LNZ Licence Status:

First Name:

Middle Name:

Last Name:

Business Phone:

Business Cell Phone:

Business Fax Number:

Business Email Address:

Conveyancing Practitioner: ☒ Yes ☐ No Please select NO if you are a support staff member who does not have primary conduct of client conveyancing matters

## REMINDERS

- Once you have registered, FMS will activate you as a user
- Your **User ID** and **Password** will be sent to you by email
- Your **Firm Trust Account Information** will be used by the Lender to deposit loan funds
- Loan instructions will only be sent to those users identified as Conveyancing Practitioners
- Other users may transact on Conveyancing Practitioners' deals if they are nominated as a Delegate

stage two

# log in to propel-lc

Once you have completed the registration process, FMS will activate your User profile and the Lender will email you to tell you the loan instructions and documents are available

## ACTIONS

- (1) Go to the **propel-lc** web site: <https://propel-lc.net>
- (2) Click on **Law Firm Login**
- (3) Login, change your password and accept the **propel-lc Terms of Use**



[Contact Us](#) | [Privacy Policy](#) |

Log In

A screenshot of the login interface. On the left, there is a background image of hands typing on a keyboard. On the right, there is a blue login box with the following elements: 'User ID : ALawyer' in a text input field, 'Password : 00000000' in a password input field, a 'Sign In' button, and two links at the bottom: 'Forgot your User ID?' and 'Forgot your Password?'.

User ID : ALawyer

Password : 00000000

Sign In

• [Forgot your User ID?](#)

• [Forgot your Password?](#)

- (4) Click **Help** and read the online training
- (5) Start working with **propel-lc** or
- (6) Call the **propel-lc** Help Desk on **0800 667 685** if you are having difficulty signing in
- (7) Technical and Training Support for **propel-lc** is available Monday to Friday between the hours of 8.30am until 5.00pm  
Call toll free on **0800 667 685** or forward an email to [help@propel-lc.net](mailto:help@propel-lc.net)

## REMINDERS

- In most cases your **user ID** will be your first initial followed directly by your surname ie. ALawyer (not case sensitive)
- Your password should not be shared and is case sensitive and needs to be typed exactly e.g. PswrD1
- You will only be able to see your deals or those delegated to you by another user



stage three

# review my profile

My Profile contains your unique details and must be completed to enable you to receive new deals and transact via **propel-lc**

## ACTIONS

(1) Click on **My Profile**



My Profile	
<input checked="" type="checkbox"/>	Contact Information
<input type="checkbox"/>	Trust Account Information
<input type="checkbox"/>	Delegated Authority
<input type="checkbox"/>	Notification Preferences
<input type="checkbox"/>	Security Questions
<input type="checkbox"/>	Change Password

(2) Click on **Contact Information**. Ensure that your details are correct. Change any incorrect information and then click **Add/Update**

(3) Click on **Trust Account Information**. Check or enter details of the Trust Account that you will use for receipt of Lender settlement funds.

If you only have one Trust Account, check the box **select all**. Click **Add/Update**

(4) Click on **Delegated Authority**. If you wish to allow another user to access your deals enter their **User ID** and click **Submit**. We recommend that both your supervising partner and your secretary/PA have access to your deals. Once their details appear, click **Continue**

(5) Click on **Notification Preferences**. Check the box **Post a Note**. Insert the **Email Address(es)** to which you wish to receive notes from the Lender. We recommend that you insert both your personal email address and the email address of your delegate(s). Click **Save**. Click **Add** to insert another email address

(6) Click on **Security Questions**. Insert your **Questions** and **Answers**. Enter your **Current Password**. Click **Submit**

## REMINDERS

- Ensure your email address details are always current to ensure you receive prompt notification from the Lender
- Assign another user(s) as your delegate(s) if you need another person to transact on your deals via **propel-lc** (either routinely or in your absence)
- Set up your trust account details. This will allow Lenders to deposit settlement funds into your trust account
- Regularly update your security questions and password and do not disclose your security questions and password to another person

# stage four preview & accept a deal

New instructions and documents (a deal)  
are accessed via the Home Page in the  
section labelled **Deals to Accept**.



Welcome: **Albert Lawyer**

[Home](#) | [My Profile](#) | [Contact Us](#) | [Help](#) | [Sign Out](#)

Home						
<div>Borrower Last Name <input type="text"/> <input type="button" value="Search"/> <a href="#">Advanced Search</a></div>						
<a href="#">Deals to Accept</a>   <a href="#">Accepted Deals</a>   <a href="#">Request for Funds Submitted</a>   <a href="#">Funds Disbursed by Lender</a>   <a href="#">Settled and Registration Pending</a>   <a href="#">Cancellation Requests</a>   <a href="#">View All Deals</a>						
Deals to Accept:						
Lender	Action	Lender Reference No.	Lawyer Name	Borrower Name	Security Property Address	Settlement
BNZ	<a href="#">Accept/Decline</a>	02-212	Lawyer, Albert	Barry, Thomas	150 Sunset Street Newtown Wellington NZ 2000, New Zealand	7 Oct 2009
KWB	<a href="#">Accept/Decline</a>	38-111	Lawyer, Albert	Green, Mark Robert	22 Victoria Road Karori Wellington NZ 2000, New Zealand	15 Oct 2009
KWB	<a href="#">Accept/Decline</a>	38-122	Lawyer, Albert	Brown, Donald	12 Nelson Street Auckland NZ 1000, New Zealand	15 Oct 2009

## ACTIONS

(1) Locate the new deal under **Deals to Accept** (2) Click on **Accept/Decline** (3) Click on **View Deal Details** (4) Click on **Preview Deal** and print if desired (5) Click on **Return to Accept/ Decline a Deal** (6) Add your firm's **File Number** and click **Accept** (or **Decline Deal** from the menu bar)

Menu	
<a href="#">Accept Deal</a>	<b>Accept a Deal</b>
<a href="#">Decline Deal</a>	
<b>Deal Information</b>	
<a href="#">View Deal Details</a> ?	
<a href="#">View Deal Documents</a>	
<a href="#">Home</a>	

Select Trust Account for Mortgage Proceeds :  \* [Edit](#)

---

**Terms & Conditions**

By accepting the deal, you agree to the terms and conditions set out in the Solicitor's Instructions.

File Number : \*

## REMINDERS

- If this is the first time you have used **propel-ic** click on **My Profile** and first complete all fields before proceeding. Some details (such as Trust Account) are taken from the assigned Lawyers profile. So if you are a delegate for the Lawyer, they must also have completed their profile
- The Lender must load the deal into **propel-ic** before you can start. You will receive an email notification when they have done this
- If you are unsure about a particular deal you can **View Deal Details** and **View Deal Documents** before you accept
- You can get and install a free copy of the latest version of Adobe Acrobat Reader at [www.adobe.com](http://www.adobe.com) **Get Adobe Reader**



stage five

# downloading documents

The Lender's documents are downloaded via the Home Page in the section labelled **Accepted Deals**

## Accepted Deals :

Alert	Lender	Lender Reference No.	Lawyer File No.	Lawyer Name	Borrower Name	Security Property Address	Settlement
	KWB	38-101	12345	Lawyer, Albert	Black, John	1, 20 Pine Street Ponsonby Auckland NZ 1000, New Zealand	7 Oct 2009
	KWB	38-111	76453739	Lawyer, Albert	Green, Mark Robert	22 Victoria Road Karori Wellington NZ 2000, New Zealand	15 Oct 2009
	ANZ	01-111	123654	Lawyer, Albert	Smith, Jane Mary	10, 18 Queen Street Central Auckland NZ 1010, New Zealand	15 Oct 2009

## ACTIONS

- (1) Locate the new deal under **Accepted Deals**
- (2) Click on **Manage Documents**
- (3) Go to **Documents Submitted by Lender**

Menu

Update / View Deal Details

Order Title Insurance

**Manage Documents**

Post a Note

Request a Cancellation

Deal Information

View Documents

View Lawyer's Comments

**Manage Documents**

Only documents submitted from this page are visible to the Lender

**Upload** | **Livedox**

**Documents Submitted by Lender:**

Description	Date Modified	Actions
LEN Instruction Letter to Lawyer	30 Apr 2010 11:33 a.m.	<a href="#">Download</a>
LEN Draft Solicitors Certificate	30 Apr 2010 11:33 a.m.	<a href="#">Download</a>
LEN Home Loan Agreement	30 Apr 2010 11:33 a.m.	<a href="#">Download</a>

- (4) Click on **Download** beside the document you want
- (5) Click on **Home** to download documents for other deals

## REMINDERS

- Download and print a copy of the disbursement note by clicking **Preview Disbursement Note**
- You can get and install a free copy of the latest version of Adobe Acrobat Reader at [www.adobe.com](http://www.adobe.com) **Get Adobe Reader**
- Save printing costs by emailing loan documents directly to your client with their consent

stage six

# secure messaging

Use the **Post a Note** feature to communicate with the Lender

## ACTIONS

- (1) From the **Home Settlements** page, under **Accepted Deals**, click on **Borrower**
- (2) Click on **Post a Note**

The screenshot shows a web application interface for posting a note. On the left is a 'Menu' sidebar with options: 'Update / View Deal Details', 'Order Title Insurance', 'Manage Documents', 'Post a Note' (highlighted with a red bar), and 'Request a Cancellation'. Below the menu is a 'Deal Information' link. The main content area is titled 'Post a note'. It contains instructions: 'Fields marked with an \* are mandatory. Select a predefined Standard Note option by clicking on the Standard Notes dropdown or complete the Subject and Note Detail fields manually.' Below this are three input fields: 'Standard Notes :' with a dropdown menu showing 'Interest Rate', 'Subject :' (empty), and 'Note Detail :' containing a red asterisk and the text '\* My client has advised that they were promised an interest rate of 6.1%. The rate in the Loan agreement is given as 6.5%. Please advise the correct rate and correct the documentation if required.'

- (3) Either click on **Standard Notes** and pick from the list or type a **Subject** heading and then enter the **Note Detail** and click on **Post A Note**

## REMINDERS

- **Post a Note** sends an email to the Lender and updates **propel-ic** with your request
- Make sure your Note includes the same details that you would include in the body of a fax letter
- When the Lender opens your note an email will be sent to you
- When a Lender responds to your Note an email will be sent to you
- Notes are stored and are viewable within the **View Notes** page

stage seven

# changes to loan data

A user may change the data within **propel-lc**. When a change is made to the data, the Lender is advised of the change. The Lender will consider the change and update their internal system.

## ACTIONS

- (1) From the **Home Settlements** page, under **Accepted Deals**, click on the **Borrowers name**
- (2) Change the data field for example the **Settlement Date**

The screenshot shows the 'Loan Details' page in the propel-lc system. On the left is a 'Menu' sidebar with options: 'Update / View Deal Details' (highlighted), 'Order Title Insurance', 'Manage Documents', 'Post a Note', 'Request a Cancellation', 'Deal Information', 'View Documents', and 'View Lawyer's Comments'. The main content area is titled 'Loan Details' and includes links for 'Preview Disbursement Note' and 'Preview Deal'. Below the title is a breadcrumb trail: 'Loan Details | Borrower | Guarantor | Security Property | Registration Particulars | Trust Account Information | Lawyer's Comments'. The 'Lawyer File Number' field contains '76453739' with 'Save' and 'Cancel' buttons. The 'Loan' section shows 'Total Loan Amount' as '\$ 100,000.00' and 'Settlement Date' as '15/10/2009'. The 'Net Loan Amount' field is empty.

- (3) Enter a new **Settlement Date** and click on **Save**

## REMINDERS

- Changing a shared data field creates an alert to the Lender to notify them of the change
- Shared data fields are **Settlement Date, Borrower Name, Guarantor Name, Security Property Address, Mortgagors Name, Mortgage Priority Amount**
- A change to the Borrower, Guarantor or Property detail is likely to require new documents to be prepared by the Lender
- When changing a field other than the **Settlement Date** we recommend you **Post a Note** to explain to the Lender why the change has been made and request consent to the change. Changing a field does not mean the change will be accepted by the Lender

stage eight

# generating documents

Use the **Manage Documents** function to generate a document template from LiveDox.

## ACTIONS

- (1) From the **Home Settlements** Page, under **Accepted Deals**, click on **Borrower**
- (2) Click on **Manage Documents**
- (3) Click on **Livedox**. This displays a list of document templates that may be generated from **Livedox**

Menu

Update / View Deal Details

Manage Documents

Post a Note

Cancel Discharge

Deal Information

View Documents

View Lawyer's Comments

### Manage Documents

Only documents submitted from this page are visible to the Lender

Upload | Livedox

Fields marked with an \* are mandatory.

Document Type: \* Select-

Generate Livedox

- (4) Select the document template required from the **Document Type** list
- (5) Click **Generate Livedox**. The document will show as pending until **Livedox** has created the document

Livedox Documents Pending :		
Display Name	Date Requested	Status
Discharge Request and Undertaking	09 Dec 2010 12:11 p.m.	Pending

- (6) Once created, the document will be displayed under **Documents Created/Uploaded by Lawyer**
- (7) Click **Download** to save the document to your PC, edit the contents, print and send to the recipient

## REMINDERS

- A document only becomes visible to the Lender once it has been **Submitted**
- Make us aware of any additional templates that you would like to see added to **Livedox** by emailing [help@propel-lc.net](mailto:help@propel-lc.net)

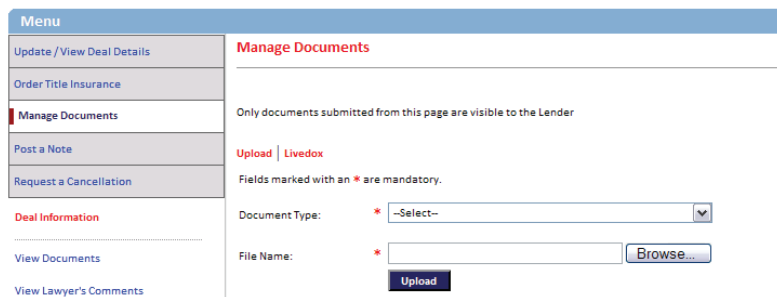
stage nine

# requesting settlement

To certify settlement and request funds, use the **Manage Documents** function to send the Solicitors Certificate and any supporting documents so they can be available to the Lender

## ACTIONS

- (1) From the **Home Settlements** page, under **Accepted Deals**, click on the **Borrowers name**
- (2) Click on **Manage Documents**
- (3) Click on **Upload**
- (4) Select **LAW Signed Solicitors Certificate and Funds Request** from the **Document Type** list



The screenshot shows a web interface for managing documents. On the left is a 'Menu' sidebar with options: 'Update / View Deal Details', 'Order Title Insurance', 'Manage Documents' (highlighted), 'Post a Note', 'Request a Cancellation', 'Deal Information', 'View Documents', and 'View Lawyer's Comments'. The main area is titled 'Manage Documents' and contains the text 'Only documents submitted from this page are visible to the Lender'. Below this, there are tabs for 'Upload' and 'Livedox'. A note states 'Fields marked with an \* are mandatory.' There are two mandatory fields: 'Document Type' with a dropdown menu showing '-Select--' and 'File Name' with a text input and a 'Browse...' button. At the bottom of the form is an 'Upload' button.

- (5) Click **Browse**, select the document you want to upload and click **Open**
- (6) Click **Upload** and then click **Submit**
- (7) Repeat the process for any additional documents that you are required to send to the Lender prior to settlement by selecting **Other** from the **Document Type** list, naming the document then **Browse**, **Open** and **Upload and Submit**

## REMINDERS

- The types of files that may be uploaded to **propel-ic** is restricted to pdf, tif and word files. If a user attempts to upload another file type, an error message will appear
- Remember to update the **Settlement Date** before uploading the **LAW Solicitors Certificate and Funds Request**
- We recommend that you enclose all settlement documents as part of one file, uploaded as the **LAW Signed Solicitors Certificate and Funds Request**. If the signed loan agreements are scanned separately use the document type **Other** to upload them
- After uploading the **LAW Signed Solicitors Certificate and Funds Request** remember to click **Submit**. Only documents that are submitted to the Lender are visible to the Lender

# stage ten

## receiving funds

The Lender will send the funds in the conventional manner via electronic Direct Credit. The Lender will confirm funding within **propel-1c** and send an email to prompt you to sign in and retrieve the **Notification of Funds Deposit** document

### ACTIONS

- (1) From the **Home Settlements** page, under **Funds Disbursed by Lender**, click on **Borrower**
- (2) Click on **Manage Documents**
- (3) Scroll to **Documents Submitted by Lender**
- (4) Find the document **Notification of Funds Deposit**. This document will contain full details of the loan funds deposited by the Lender
- (5) Click on **Download** and, if required, print and place on your file

Menu			
Update /View Deal Details	View Documents		
Order Title Insurance			
Manage Documents	Only Documents Submitted to Lender are visible to the Lender		
Post a Note	Documents Submitted by Lender		
Request a Cancellation	Description	Date Modified	Actions
	Notification of Funds Deposit	09 Dec 2010 2:02 p.m.	Download

### REMINDERS

- The Lender will only confirm funding once you have completed all pre-settlement requirements
- **Post a Note** to advise the Lender of any specific information that the Lender may require prior to settlement
- 24 hours after settlement, the deal will automatically move to the **Settled and Registration Pending** stage on the **Home Settlements** page
- If you are required to return funds to the Lender, **Post a Note** to advise the Lender

stage eleven

# confirm registration

To confirm registration to the Lender, use the **Manage Documents** function to send the Post Registration Search, View Instrument Details and any supporting documents so they can be available to the Lender

## ACTIONS

- (1) Click on **Borrower** in the **Home Settlements** page
- (2) Click on **Manage Documents**
- (3) Click on **Upload**
- (4) Select **LAW Post Registration Search** from the **Document Type** list
- (5) Click **Browse**, select the document you want to upload and click **Open**, **Upload** and **Submit**
- (6) Repeat the process for any additional documents that you are required to send to the Lender to confirm registration by selecting **Other** from the **Document Type** list, naming the document then **Browse**, **Open** and **Upload** and **Submit**

Menu	
Update / View Deal Details	<b>Manage Documents</b>
Order Title Insurance	
<b>Manage Documents</b>	
Post a Note	
Request a Cancellation	
<b>Deal Information</b>	Only documents submitted from this page are visible to the Lender
View Documents	<b>Upload</b>   Livedox
View Lawyer's Comments	Fields marked with an * are mandatory.
	Document Type: * --Select--
	File Name: * <input type="text"/> <input type="button" value="Browse..."/>
	<input type="button" value="Upload"/>

## REMINDERS

- After uploading the **LAW Post Registration Search** remember to click **Submit**
- Once the **LAW Post Registration Search** has been uploaded, the deal will be removed from the **Home Settlements** page and can be located via the **Search** and **Advanced Search** functions
- Upload your Client A & I and enter the LINZ eDealing number into the **registration particulars** area of **propel-ic**. FMS undertakes to hold documentation within **propel-ic** for a period of at least 10 years for LINZ audit purposes



# request cancellation

To notify the Lender that the transaction is no longer proceeding you must request a cancellation of the deal

## ACTIONS

- (1) Click on **Borrower** in the **Home Settlements** page
- (2) Click on **Request a Cancellation**
- (3) Select a reason for the cancellation from the **Reason Type** list
- (4) Enter any additional text by way of explanation if required
- (5) Click **Submit**

Menu

Update / View Deal Details

Order Title Insurance

Manage Documents

Post a Note

**Request a Cancellation**

Deal Information

View Documents

View Lawyer's Comments

View Notes

**Request a Cancellation**

Fields marked with an \* are mandatory.

Reason Type :

\*--Select--

\*

(You may enter up to 500 characters.)

Submit

## REMINDERS

- Requesting a cancellation sends an email to the Lender and updates **propel-ic** with your request
- Make sure your additional text includes the same details that you would normally include in the body of a fax letter
- When the Lender has updated their system with the cancellation they will update **propel-ic** and this will remove the deal from your **Home Settlements** page

# deal history

The electronic record of communications with the Lender and action taken within **propel-ic** is viewed via **View Deal History**

## ACTIONS

- (1) Click on **Borrower** in the **Home Settlements** page
- (2) Click on **View Deal History**

Deal Summary	Status								
Lender Name : Kiwibank Lender Reference Number : 38-111 Lender Contact : Alfred Contact Lender Phone/Fax : 1234567/ Lawyer File Number : 76453739 Borrower Name : Mark Green Security Property Address : 22 Victoria Road, Karori, Wellington, 2000, New Zealand Total Loan Amount : \$100,000.00 Settlement Date : 15 Oct 2009	<table><tr><th>Deal Status</th><th>Date Completed</th></tr><tr><td>Deal Accepted</td><td>21 Apr 2010 11:54 a.m. ET</td></tr><tr><td>Request for Funds Submitted</td><td></td></tr><tr><td>Registration Confirmation Submitted</td><td></td></tr></table>	Deal Status	Date Completed	Deal Accepted	21 Apr 2010 11:54 a.m. ET	Request for Funds Submitted		Registration Confirmation Submitted	
Deal Status	Date Completed								
Deal Accepted	21 Apr 2010 11:54 a.m. ET								
Request for Funds Submitted									
Registration Confirmation Submitted									

Menu																													
Update /View Deal Details	<div>Deal History</div> <table><thead><tr><th>Username</th><th>Activity</th><th>Date</th></tr></thead><tbody><tr><td>SYSTEM</td><td>A new deal has been submitted by the Lender.</td><td>15 Sep 2009 08:41 a.m. ET</td></tr><tr><td>ALawyer</td><td>Deal has been accepted</td><td>21 Apr 2010 11:54 a.m. ET</td></tr><tr><td>ALawyer</td><td>Disbursement Note Created</td><td>21 Apr 2010 11:54 a.m. ET</td></tr><tr><td>KWBAContact</td><td>LEN Kiwibank Instruction Letter to Lawyer Document uploaded successfully.</td><td>21 Apr 2010 11:57 a.m. ET</td></tr><tr><td>Manage Documents</td><td>KWBAContact</td><td>LEN Kiwibank Home Loan Agreement Document uploaded successfully.</td><td>21 Apr 2010 11:57 a.m. ET</td></tr><tr><td>Post a Note</td><td>KWBAContact</td><td>LEN Kiwibank Mortgage Terms and Conditions Document uploaded successfully.</td><td>21 Apr 2010 11:58 a.m. ET</td></tr><tr><td>Request a Cancellation</td><td>KWBAContact</td><td>LEN Kiwibank Fees and Limits Brochure Document uploaded successfully.</td><td>21 Apr 2010 11:58 a.m. ET</td></tr></tbody></table>		Username	Activity	Date	SYSTEM	A new deal has been submitted by the Lender.	15 Sep 2009 08:41 a.m. ET	ALawyer	Deal has been accepted	21 Apr 2010 11:54 a.m. ET	ALawyer	Disbursement Note Created	21 Apr 2010 11:54 a.m. ET	KWBAContact	LEN Kiwibank Instruction Letter to Lawyer Document uploaded successfully.	21 Apr 2010 11:57 a.m. ET	Manage Documents	KWBAContact	LEN Kiwibank Home Loan Agreement Document uploaded successfully.	21 Apr 2010 11:57 a.m. ET	Post a Note	KWBAContact	LEN Kiwibank Mortgage Terms and Conditions Document uploaded successfully.	21 Apr 2010 11:58 a.m. ET	Request a Cancellation	KWBAContact	LEN Kiwibank Fees and Limits Brochure Document uploaded successfully.	21 Apr 2010 11:58 a.m. ET
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## REMINDERS

- All action taken within **propel-ic** is stored within the **View Deal History**
- The **Deal History** records the user who completed the action, the activity completed and the date and time the action was taken

# lawyer's comments

Users may record a comment about a document sent or uploaded to **propel-ic** using the **Lawyer's Comments page**

## ACTIONS

- (1) Click on **Borrower** in the **Home Settlements** page
- (2) Click on **Update/View Deal Details**
- (3) Click on **Lawyer's comments**
- (4) Enter the text of the comment into the **Comments** Box
- (5) Click **Save**

Menu

Update / View Deal Details

Order Title Insurance

Manage Documents

Post a Note

Request a Cancellation

Deal Information

View Documents

View Lawyer's Comments

View Notes

View Deal History

Home

Lawyer's Comments

Preview Disbursement Note | Preview Deal

Loan Details | Borrower | Guarantor | Security Property | Registration Particulars | Trust Account Information | Lawyer's Comments

Comments that are entered on this page are not visible to the Lender

Comments:

Client requires advice on setting up a trust. Refer to Partner.

(You may enter up to 1000 characters.)

Save Cancel

Comments Posted

Entered	Comment	Action
21 Apr 2010 12:48 p.m. ET	Reminder: Prior to settlement discuss with client arrangements for collection of keys.	Delete

## REMINDERS

- All comments saved to the deal are stored and can be viewed in **propel-ic** within the **View Lawyer's Comments** page
- **Lawyer's Comments** are not visible to the Lender

# disbursement note

The Law Firm will be charged a fee for each settlement that passes through **propel-ic**. The disbursement note is available for download and print using the **Preview Disbursement Note** page

## ACTIONS

- (1) Click on **Borrower** in the **Home Settlements** page
- (2) Click on **Preview Disbursement Note**

The screenshot shows the 'Loan Details' page in the propel-ic system. On the left is a 'Menu' with options: 'Update / View Deal Details' (highlighted), 'Order Title Insurance', and 'Manage Documents'. The main area is titled 'Loan Details' and contains a breadcrumb trail: 'Loan Details | Borrower | Guarantor | Security Property | Registration Particulars | Trust Account Information | Lawyer's Comments'. On the right, there are two buttons: 'Preview Disbursement Note' and 'Preview Deal'. At the bottom of the main area are 'Save' and 'Cancel' buttons.

- (3) Select **Print**

## REMINDERS

- The fee for using **propel-ic** is a disbursement that may be passed onto a client
- We recommend you print the disbursement note when you accept a deal and post to your client's matter as a pending disbursement to ensure you include in your invoice to your client
- When the Lender confirms funding, an invoice will be raised to the Law Firm by First Mortgage Services Limited
- A statement of invoices will be rendered by email to the Law Firm on a monthly basis
- The method for payment of invoices is by monthly direct debit or by alternative method as agreed with the Law Firm

The screenshot shows the 'Disbursement Note - Disbursement Print Preview' page in a Microsoft Internet Explorer browser window. The page features the 'First Mortgage Services' logo at the top right. Below the logo, the date '21 April 2010' is displayed. The main content area contains the following information:  
Attention: Albert Lawyer  
Spanners and Gears  
Spanners and Gears  
95 Kilburn Street  
Auckland  
  
Lender: Kwikwik  
Loan Advance to: Mark Green  
Lender Reference Number: 38-111  
Lawyer Reference Number: 76453739  
  
Below this, it states: 'For documentation, settlement and registration services via propel-ic.' and 'Fee: \$16.00'. At the bottom, a disclaimer reads: 'This is a note of the disbursement to be incurred for this transaction. The above fee excludes GST. This is not a GST invoice. An invoice will be rendered by First Mortgage Services Limited to your firm if and when funding is confirmed by the lender on settlement.'