

How to invite the Client To start the Fast Connect process

You are best to decide when the client should start the on-boarding, it could be when file becomes unconditional, settlement has been booked or some other criteria that you feel is best for your client.

Under the main menu Communications, to the right of Stewart Title, you will see the Fast Connect option.



Registration

If this is the first time that you have used this facility, then you are required to enter your Fast Connect Agency Code. On the top left select the **Settings** option and tick to enable fast Connection Integration. Then enter your agency code that you can obtain from Fast Connect.

A screenshot of a dialog box titled 'FastConnect' with a close button (x) in the top right corner. Inside the dialog, there is a checked checkbox labeled 'Enable FastConnect Integration'. Below it is a text input field labeled 'FastConnect Agency Code' containing the text '6276W'. At the bottom right of the dialog is a 'Save' button.

Upon **Save** a disclaimer will be presented to you that you should read before using this facility

Invite parties

A list of all the parties that you are acting for will appear.

Matter Overview ✕

Settings

Parties

PartyId	Client Code	Name	Has Referral	Side
817	SAM003	James Samson	False	Buyer
818	SAM004	Mike Samson	False	Buyer

Highlight and selection and their details will appear. Check their details.

Create Referral ✕

Party Contact Details

Title

First Name

Surname

Email

Mobile

Must start with 04 and be 10 digits in length.

All required fields are marked in bold.

Move In Address

Unit Number

Street Number

Street Name

Street Type

Suburb

Post Code

Include Move In Date

You can include and change the move in/out date.

Create Referral

Party Contact Details

Title
[Dropdown]

First Name
James

Surname
SAMSON

Email
james@smithcompany.com.au

Mobile
0421741852
Must start with 04 and be 10 digits in length.

All required fields are marked in bold.

Move In Address

Unit Number
[Text]

Street Number
44

Street Name
Main

Street Type
Street

Suburb
OSBORNE PARK

Post Code
6017

Include Move In Date
Move In Date
22-Feb-21

February 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	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	1	2	3	4	5	6
7	8	9	10	11	12	13

Today: 22-Feb-21

Buttons: Cancel, Create Referral

Upon pressing **Create Referral** a disclaimer will appear

Once you accepted, the party contact details and either the Move In or Move Out details will be sent to Fast Connect who will send to them a SMS and email