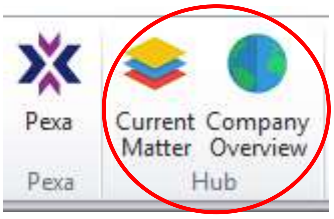
THE HUB

BACKGROUND

The Hub is an easy, safe and secure way for your clients to see the progress of their deal, or deals if more than one, access all their correspondence, communicate with their conveyancer and verify their bank account details securely.

To use this facility, there are now 2 additional Icons on the screen adjacent to the PEXA Icon as shown below:



The Current Matter icon will provide access to all the relevant information pertaining to your current active file while the Company Overview icon brings up a list of the files that have been made Hub Ready for your to select the file you wish to work on.

The Hub uses 2 methods of communication with your clients being email and SMS, thus providing a better level of security for all parties.

Additionally, emails that are sent to your client DO NOT come from YOUR computer and their email address will not be recorded in your email address book. This is because the emails are sent from a secure server. External access to that server will be restricted to your clients who will receive an access code via SMS.

MAKING THE FILE HUB READY

For the Hub to be effective, it needs to have the file details put into it. Once activated, while this happens automatically when loading a new file, for files that are already in your system, you will need to get the relevant information transferred but this will only need to be done once for each OLD file.

The process to transfer the information is to open the Property Details screen and hit the OK button, then open the Agent Details and Contract Details screens in turn and again hit the OK button.

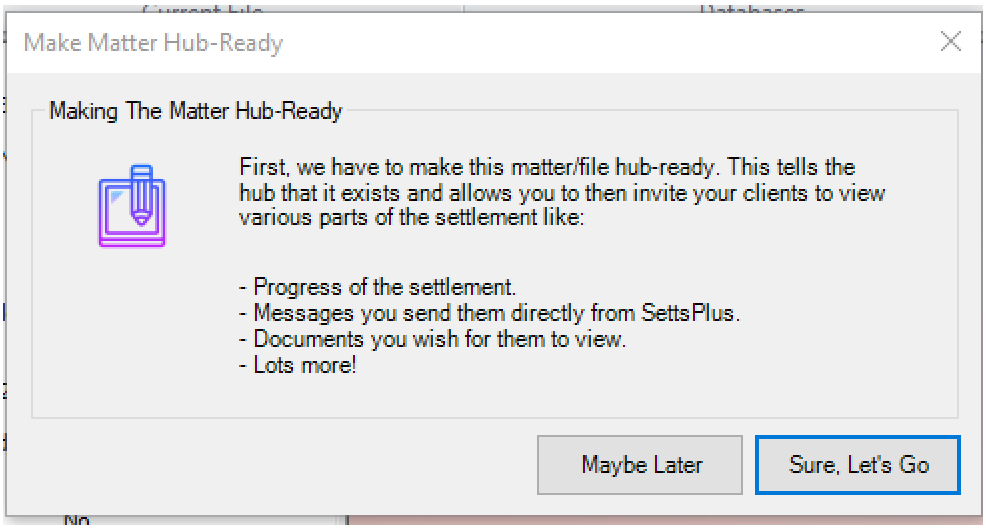
Transferring your client's details is slightly different in that you will need to open the Seller/Buyer Details screen and highlight each of YOUR CLIENTS INDIVIDUALLY, select the EDIT button and then Edit Client Details. When that page opens, hit OK and save the entry then proceed with the remainder of your clients.

Now that the necessary information has been loaded into the Hub, click on the Current Matter icon and a whole new world will be opened for you.

METHODOLOGY

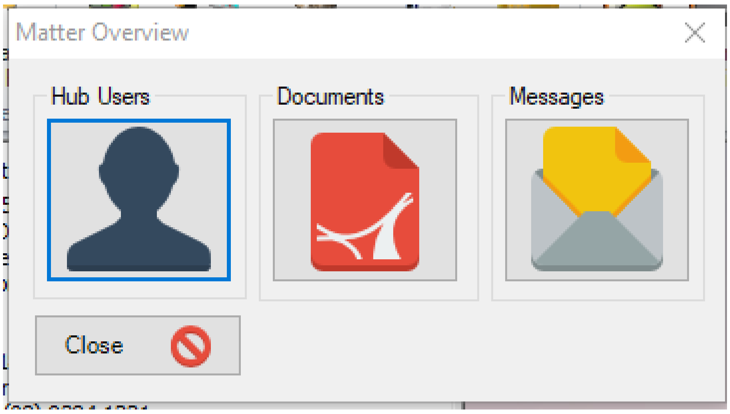
INVITING YOUR CLIENTS TO THE HUB

Having clicked on the Current Matter icon, the following dialogue box will appear

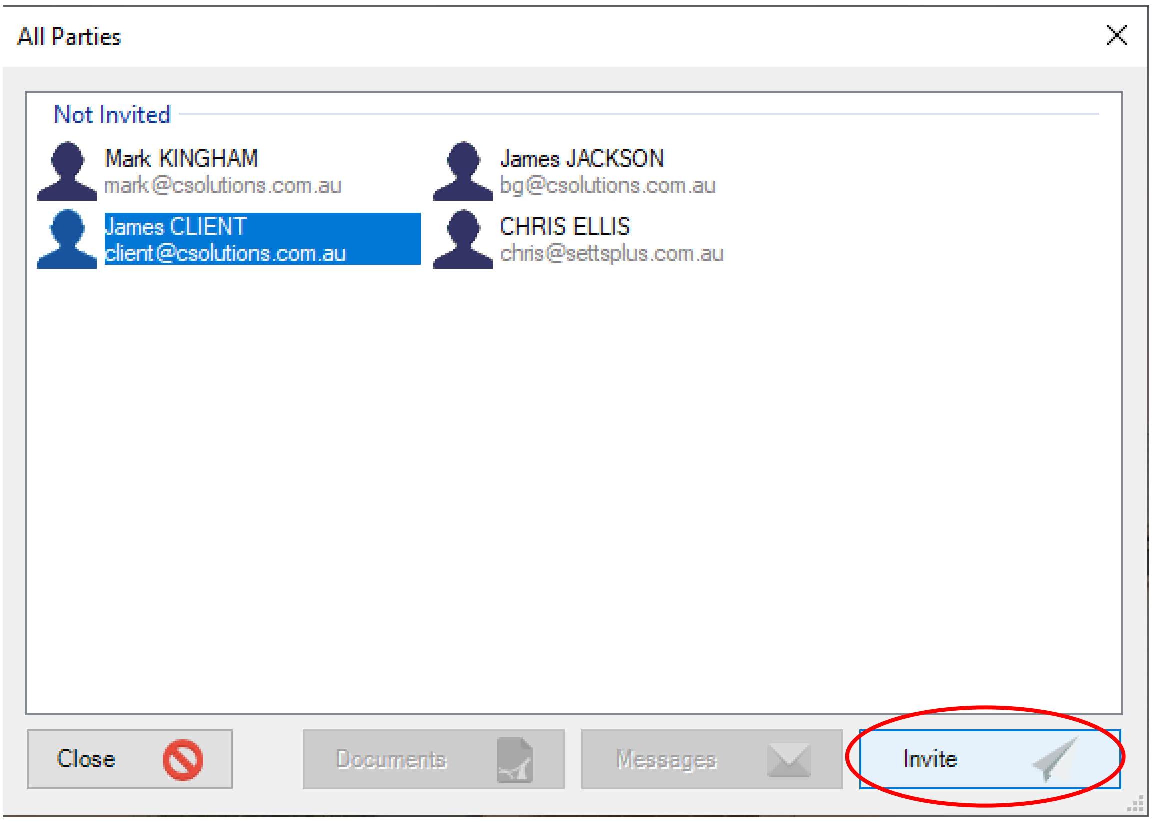


and to start the process, click on the Sure. Let's Go button. NB. This screen only appears the first time you want to make any file Hub-Ready.

When you click on the Current Matter icon on a file that has already been made Hub-Ready, the following screen will appear. You could consider this screen as the Home page for the Hub.



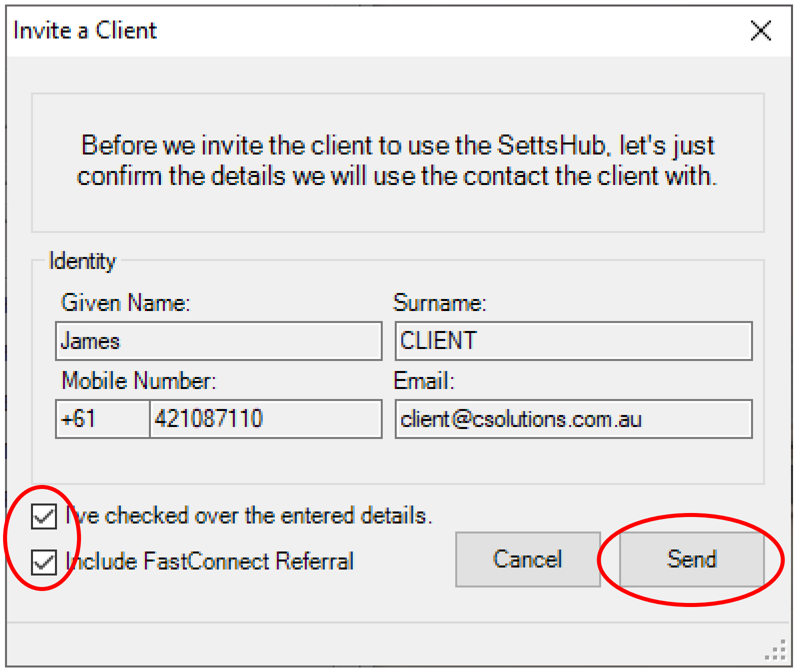
The next thing you will need to do is to INVITE the clients to access the Hub. This is done by clicking on the Hub Users button and the list of CLIENTS attached to the Current Matter will appear under the heading of Not Invited.



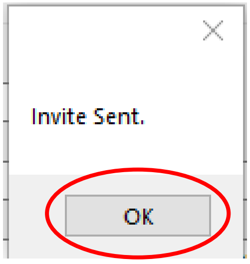
You now need to INVITE the clients to the Hub by clicking on the client to invite and then the Invite button as shown below:

This will trigger an email being sent from the secure server to the client advising them of the invitation.

Before the notification is sent, a screen with the clients details as shown on the file will appear which at this point **MUST** include their Mobile number and email address. Check to ensure the details are correct, tick the box to signify the details are correct and select the Send button as illustrated below



The notification will now be sent and you will get a confirmation as shown below then click OK.

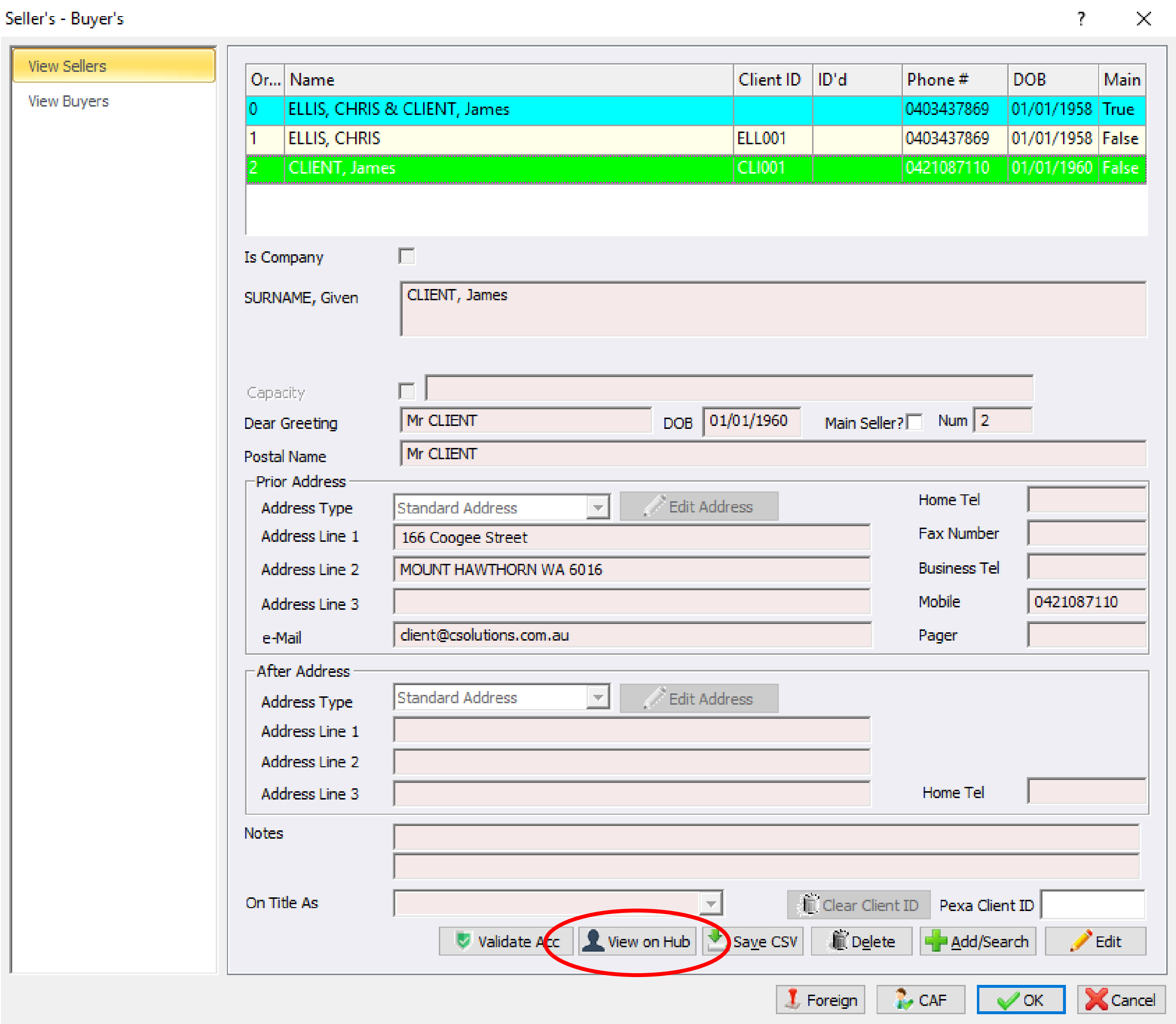


The result of this will be that the All Parties screen will now be split into 2 sections, if required, the top one called Pending Hub User which will have icons for the parties that have been invited and the bottom section having icons for the parties that have not been invited yet. NB: it should be noted that the system will not send a second invitation to an email address that has already received one, ie, if your clients, Mr & Mrs Smith have the same email address, the invitation can be sent to either party BUT the other party will not receive an individual invitation.

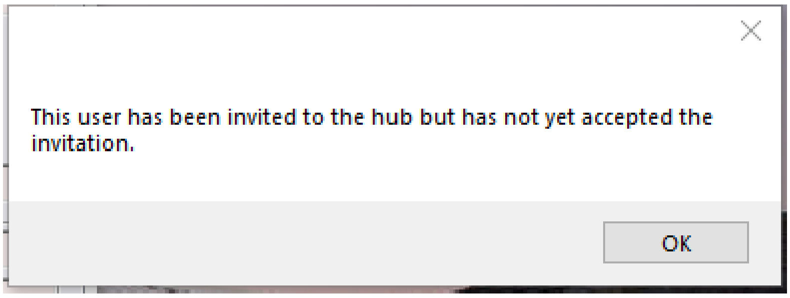
If you have not received a response from your client within a few days or the client loses his email, you can resend the invitation by selecting Current Matter, Hub Users and RIGHT CLICK on the client which will bring up a button to resend it.

Please note there are two ways for you to get information about your file FROM the Hub. Most commonly you would select the appropriate file and go through the Current Matter icon which will provide you with access to **ALL** the information on the Hub regarding that file.

If, however, you wanted to look at your interaction with only a selected client, select the appropriate file, then bring up the client's page in the Seller/Buyer Details screen and select the View on Hub button which will strip out information on that client only. NB. Please note the View on Hub button will only appear on the Seller/Buyer Details screen if you select an individual entry, are acting for that client and it is not the main party entry.



If you had sent an invitation to a client and were looking to see if they had acted on the invitation but the client has not yet logged into the Hub to do whatever was required, by clicking on the client's icon again, you would get the following response from the system:



FORWARD DOCUMENT AND INVITE

A nice feature of the Hub is that you can prepare documents and send documents to the client as part of the invite so that when the client registers/logs in they will see that there are pending documents waiting.

So once you have invited the party send documents as explained in DOCUMENTS on page 17.

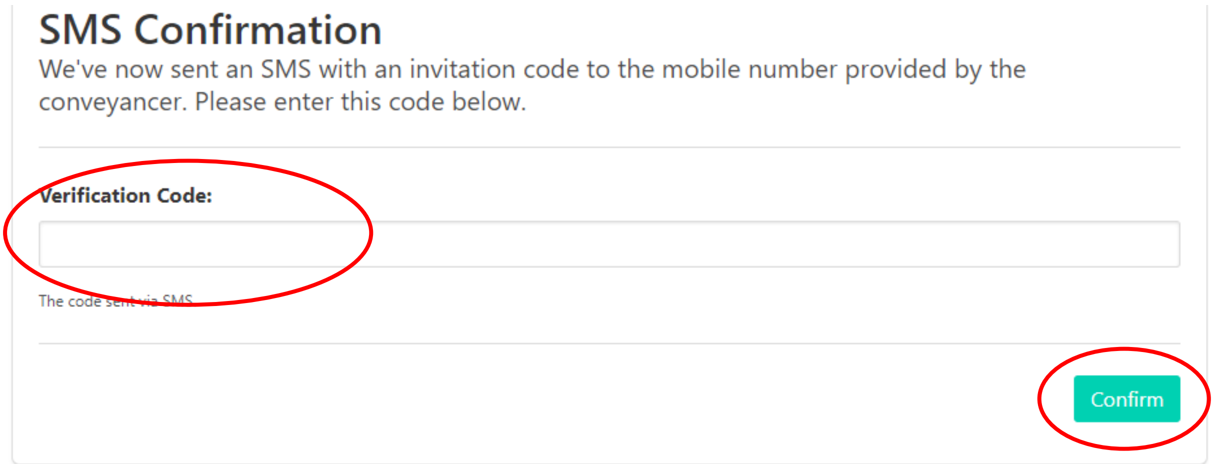
WHAT THE CLIENT SEES

At this point, assuming the client has received the invitation email and clicked on the link, the following screen will open where they will be required to log into the Hub and register their details:

The client now needs to complete the screen by putting in their email address and mobile number thus confirming the details that you already have. They also need to put in a PASSWORD OF THEIR OWN CHOOSING, confirm the password and hit the Register button. The Hub will now take note of the password as an identifier.

NB. THEY WILL NEED TO REMEMBER THE PASSWORD THEY USE AS THIS WILL BE REQUIRED ON ANY OCCASION THEY NEED TO GET INTO THE HUB.

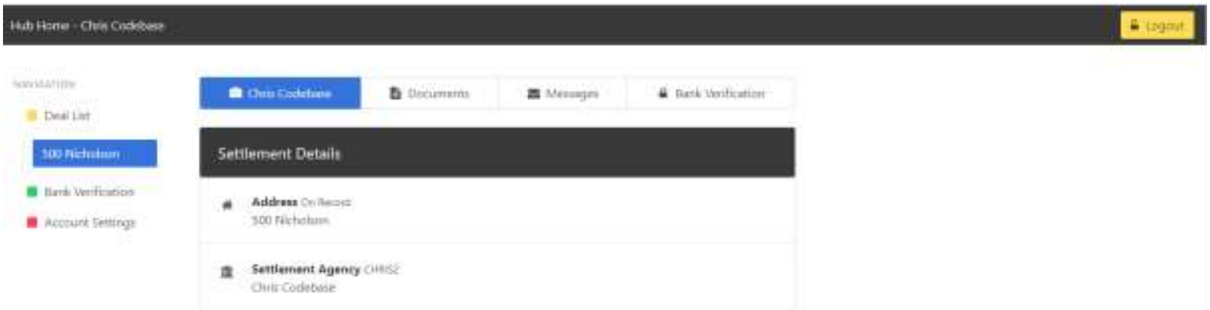
Not only will the client now be registered but he will receive an SMS confirming the registration containing a code to link him to the file, this code needs to be inserted in the Verification Code field on the following page and then select confirm. (SECURITY FEATURE)



Once they have entered the correct verification code, the client will be presented with the Terms and conditions page.

As you will see there is a waiver to you in the event that the client does not want to use the Hub.

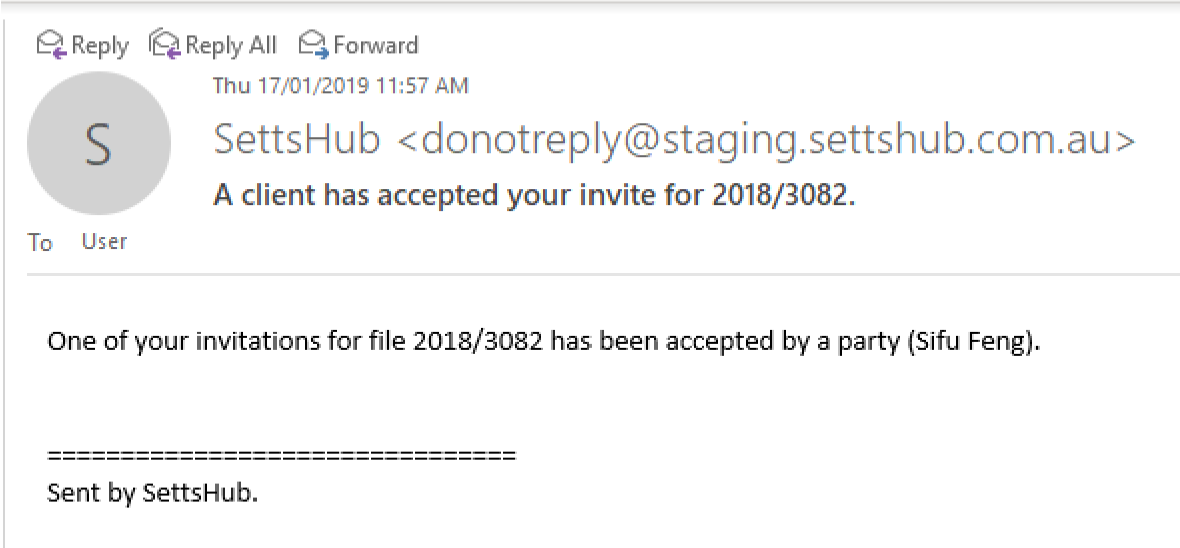
Assuming the client only has one Matter on the go with you at the time, the system will automatically link the client to that file and give them access to anything you send them and they will see a screen similar to the following



which will show ALL their deals currently known to the Hub in the menu at the left side of the screen under the heading of Deal List plus icons to take them to the Bank Account verification screen and the Account Settings page described in greater detail below.

Additionally, the screen will provide them with information on the SPECIFIC deal the invitation relates to by showing the property address and the name of the settlement agency who sent the invitation under the large heading of Settlement Details and provide Tabs along the top of the screen for them to navigate to the various functions of the Hub which are beside the settlement agency name duplicated on the top menu bar.

When the client has accepted your invitation to Register on the Hub and completed their initial details, you will receive an email advising which client has completed their registration and the file that invitation pertained to.



Reply Reply All Forward

Thu 17/01/2019 11:57 AM

SettsHub <donotreply@staging.settshub.com.au>

A client has accepted your invite for 2018/3082.

To User

One of your invitations for file 2018/3082 has been accepted by a party (Sifu Feng).

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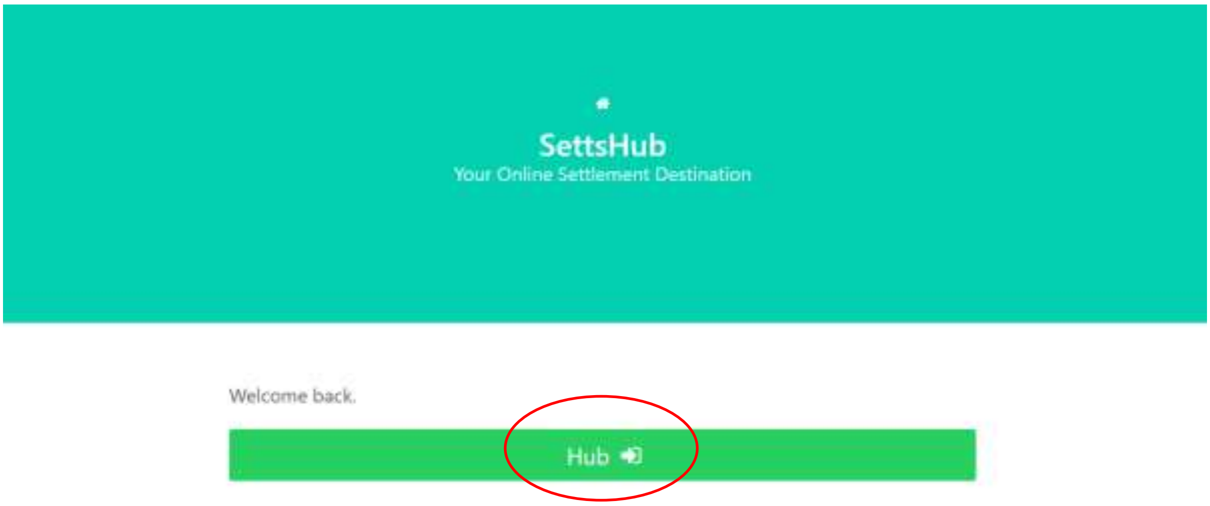
Sent by SettsHub.

This is likely to be their initial contact and if no messages or documents have been sent (described in more detail later) they can then Logout of the Hub by selecting the button in the upper right hand corner.

FUTURE CONTACT

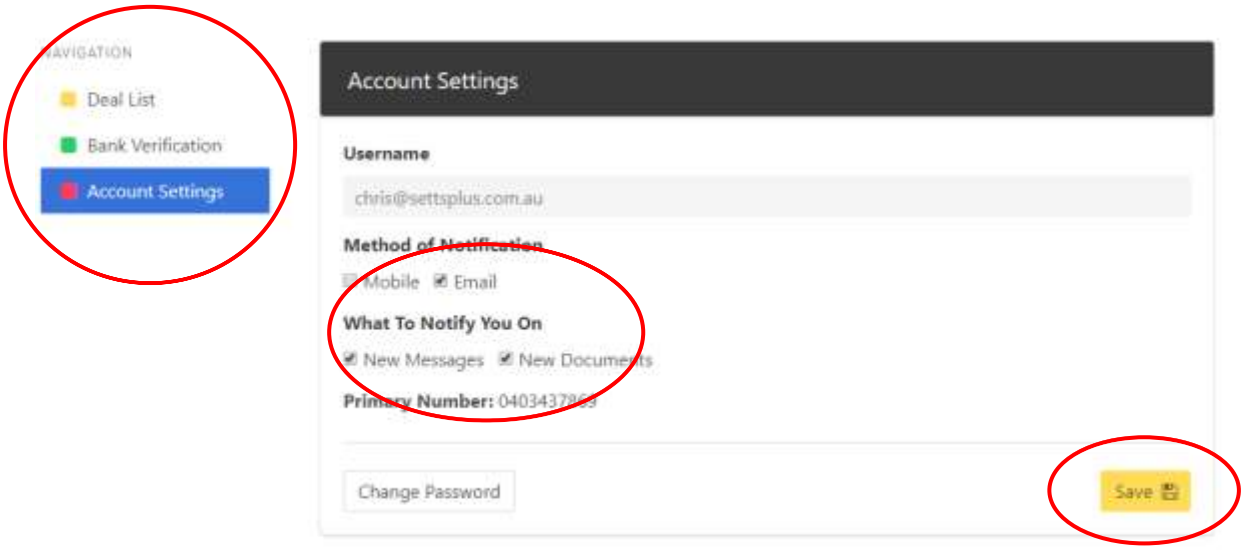
As the matter progresses and you wish to send documents or messages to your client, they will receive a further notification requesting them to log into SettsHub which will bring up the following screen:



The client completes the page by clicking on the Hub line as shown and inserting their email address and the password they previously set and Login.

ACCOUNT SETTINGS

After the client has logged into the Hub, he will be able to see three areas that he can navigate to, being his Deal List, Bank Verification and Account Settings.



The Account Settings page allows the user to modify their mobile number and to change their password. It also allows the user to select how they are to be notified and which events should trigger a notification.

Having arrived at this page, they can modify their provided mobile number that they wish to use for their notifications and tick the boxes to signify their preferred Method of Notification for both Messages and Documents. These will default to notification by email for both Messages and Documents but can be changed by the clients.

Additionally, should the client wish to change their password, there is also a button on this page where they can do so.

Once the details have been confirmed by the client, they simply press the Save button.

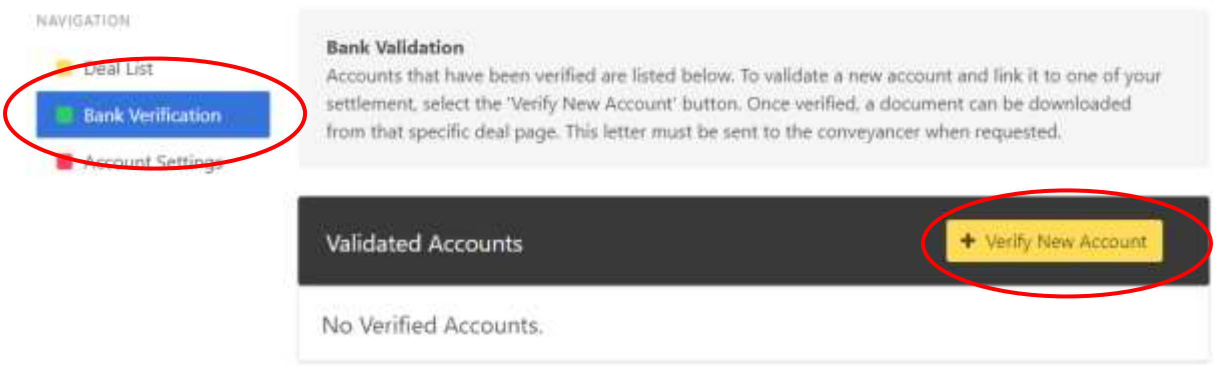
BANK ACCOUNT VERIFICATION

To commence the bank account verification, from the letter library search and send via the Hub the document titled (BAV) Bank Account Verification Buyer or (BAV) Bank Account Verification Seller.

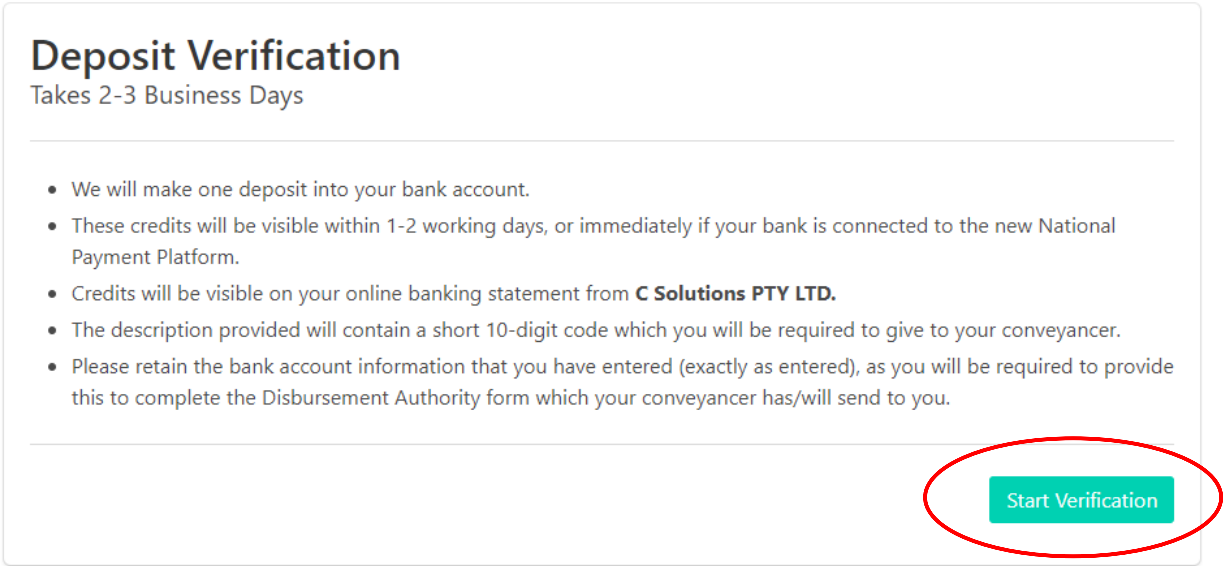
For the client to go through the verification process, they will need to login to the Hub and from the Home page, select Bank Verification.

Obviously, upon first contact with the Hub, there will not be any accounts verified so the screen will appear as below.

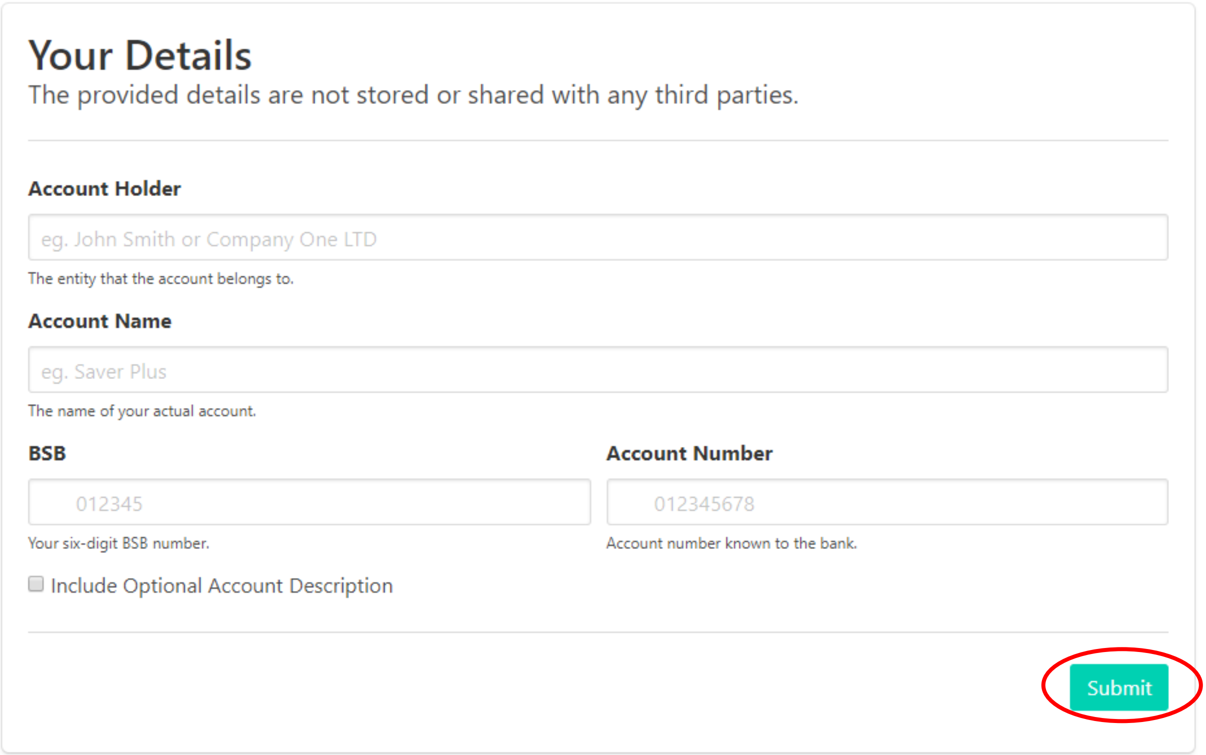
To begin the process, they simply need to select the button entitled Verify New Account.



This will then open a page called Deposit Verification which will provide information on what happens during this process. They will then need to select Start Verification.



The next page to open is titled Your Details which they will need to complete and then select Submit.

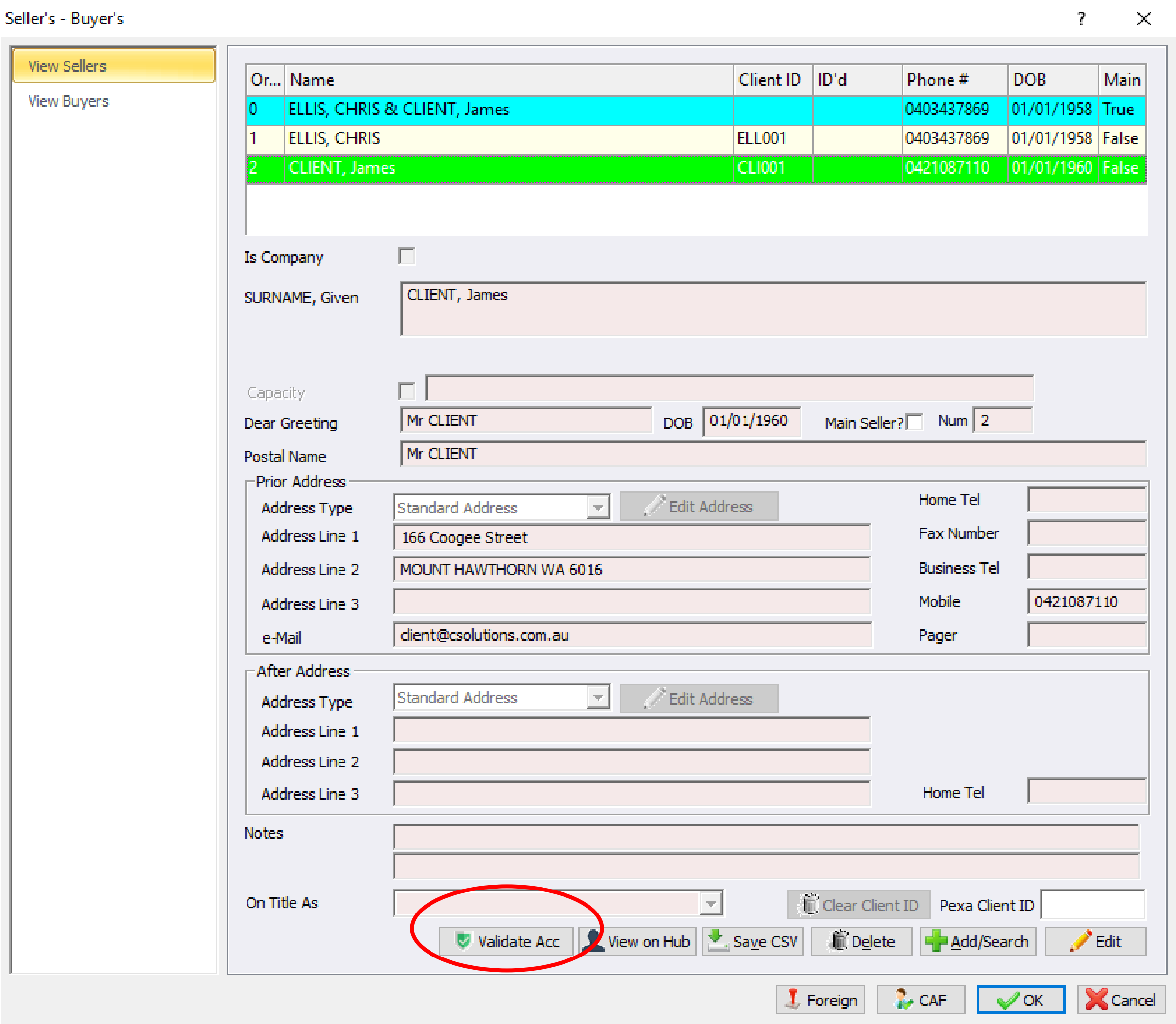


The client will then get a page open on their screen explaining they have received a small deposit into their nominated account and when they should be able to see the deposit on their statement and click on Back to Hub.

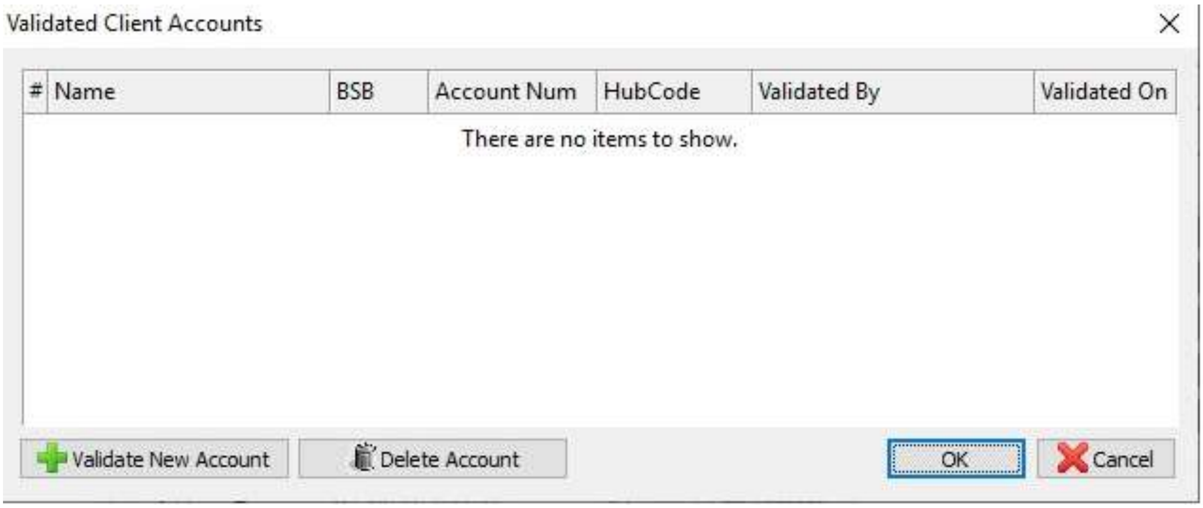
The code attached to the deposit on their bank statement will be a 10-character code starting with HC which they will need to write on the Bank Account Verification Form you have sent to them along with the remainder of their instructions for the disbursement of their funds at settlement.

From your perspective, the client account information will now appear in the Hub as Pending Verification and upon return of this signed form you will need to validate the account from the buyer/seller screen.

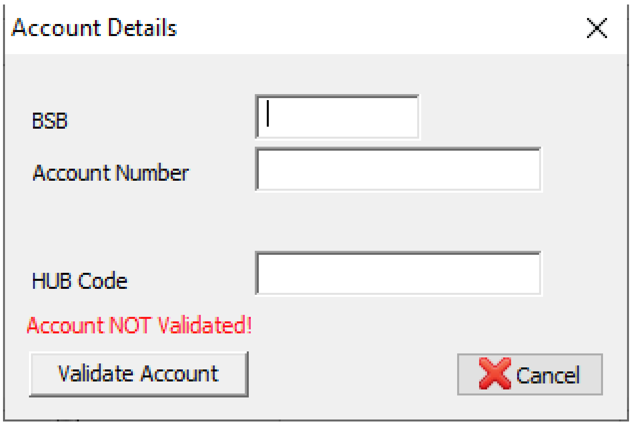
Select the client you wish to validate his bank account and then press “validate acc”.



A list of accounts for this client will appear (if there are any) as the system allows you to validate multiple accounts for the same client.

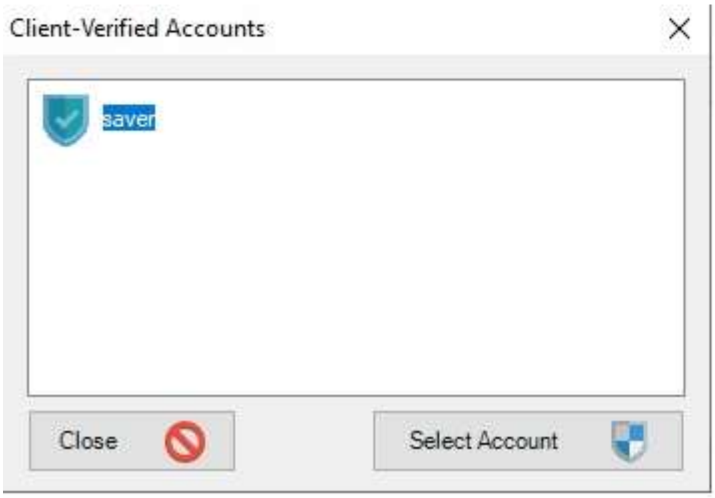


Upon Selecting Validate New Account the following screen will appear.



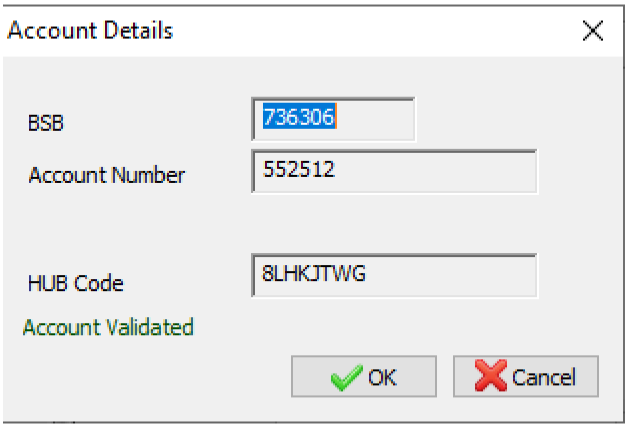
Now enter the BSB, Account Number and HUB Code that appears on the signed form that you would have received from the and press Validate Account.

If the account details match to those that we have for the client then the account name screen will appear.

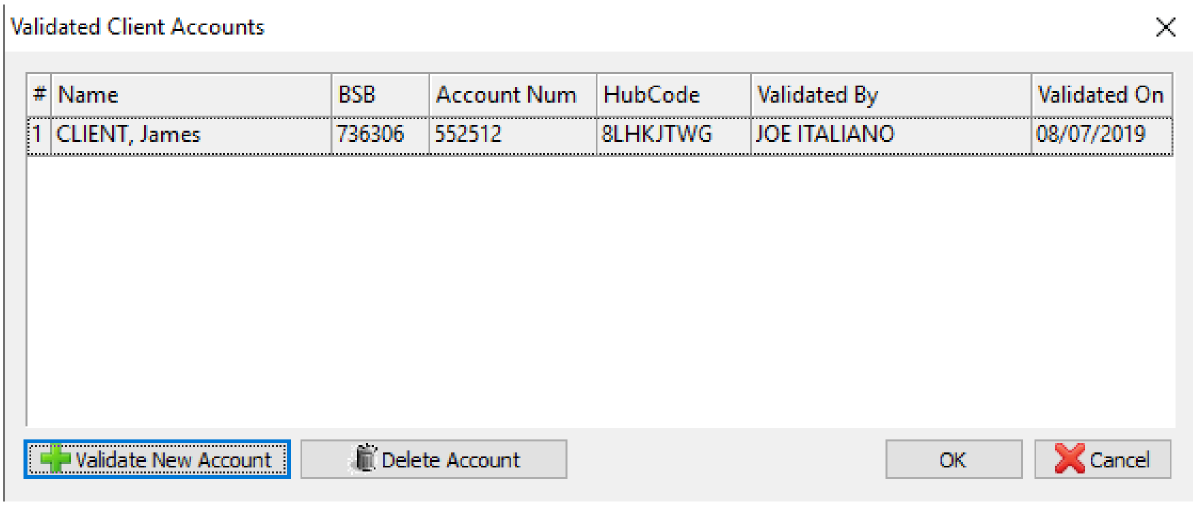


Select the account name for this client as per the signed form and press Select Account.

Press OK and the account will be validated.



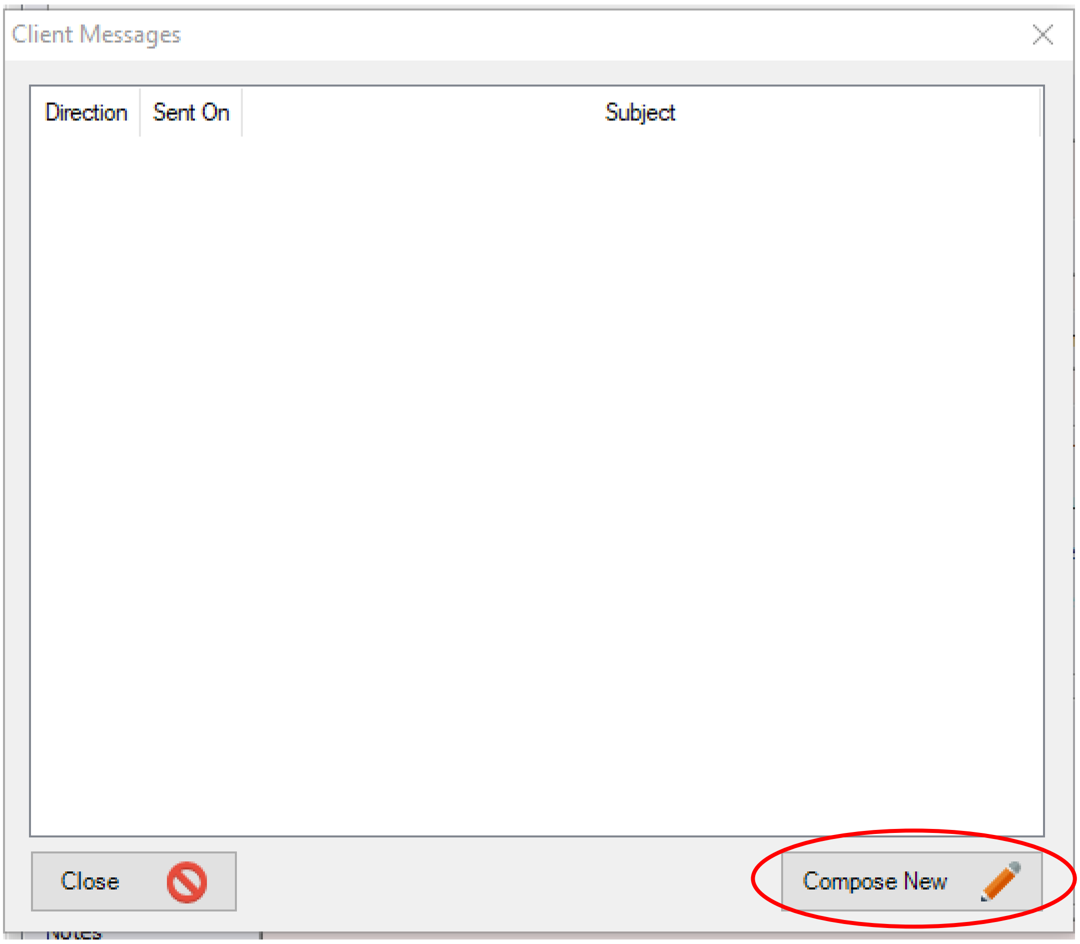
Once the account has been validated and details provided are correct this account is now ready to be used in the balance sheet.



Assuming there is only one deal on the go for that client at the time, it will automatically link the account to that file. If there was more than one file for that client, he would have selected the file that the account would link to when doing the verification.

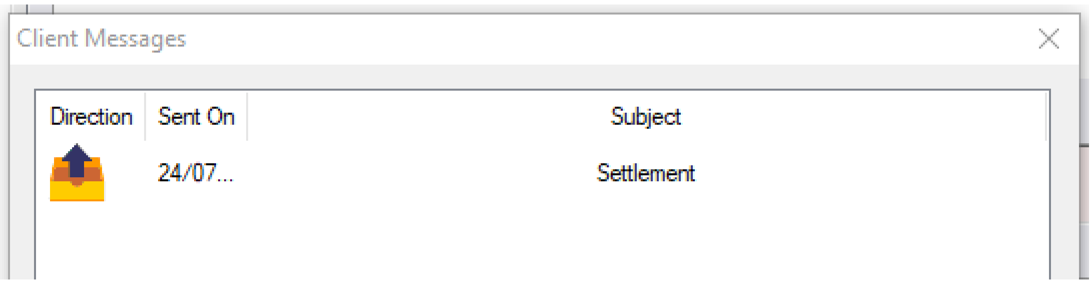
MESSAGES

To use this part of the Hub, if you wish to send a message to one of your clients, you can do either of two things. Either click on the Current Matter, select Hub Users, highlight the client and select Messages and compose the message. Alternatively, with the relevant file as the active file, go to the Seller/Buyer Details screen and select the client, select View on Hub and click on Messages and compose the message by selecting Compose New. The following screen will open for you by either route.



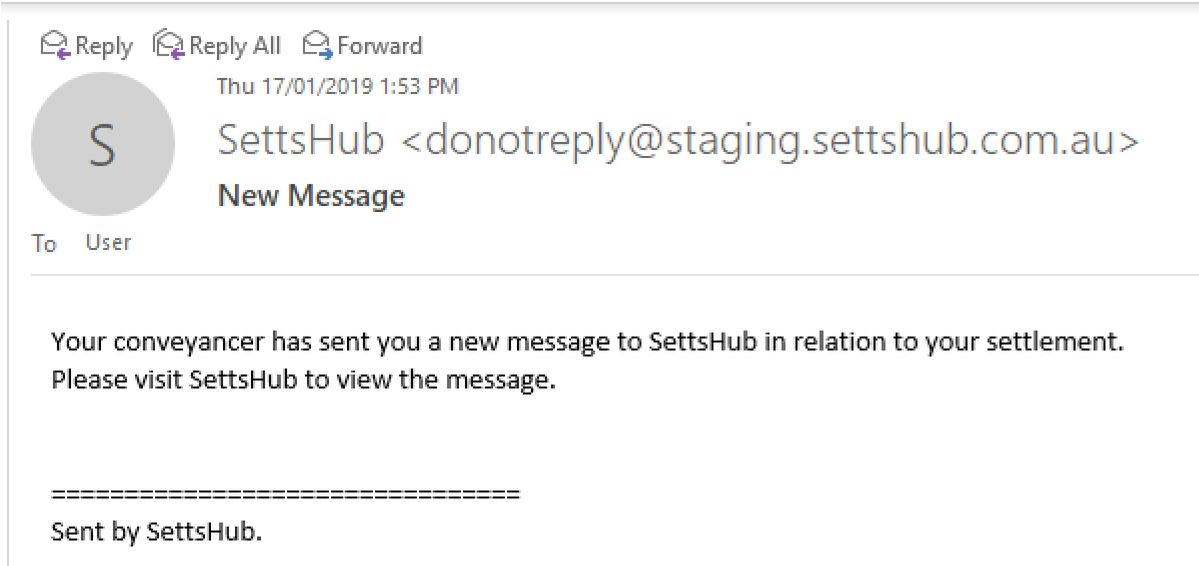
Using either method, when you hit the Send button at the bottom of the screen, the client will receive an email notification that there is a new message waiting for them on the Hub. They will then need to login with their credentials, (REMEMBERING THEIR PASSWORD), so they can pick up the message.

When the message has been sent, you will get confirmation of same on the following screen:



NB. This is only part of the screen. Then press Close to exit the screen.

The client will then receive notification that there is a new message waiting for them on the Hub



Reply Reply All Forward

Thu 17/01/2019 1:53 PM

SettsHub <donotreply@staging.settshub.com.au>

New Message

To User

Your conveyancer has sent you a new message to SettsHub in relation to your settlement. Please visit SettsHub to view the message.

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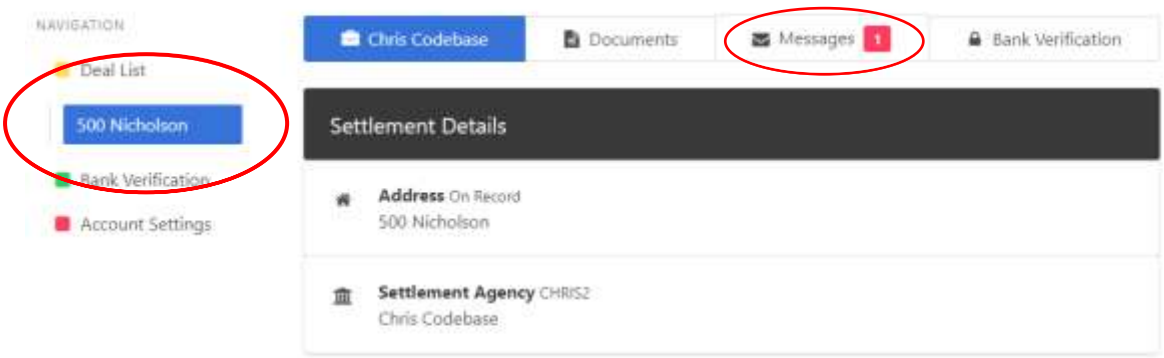
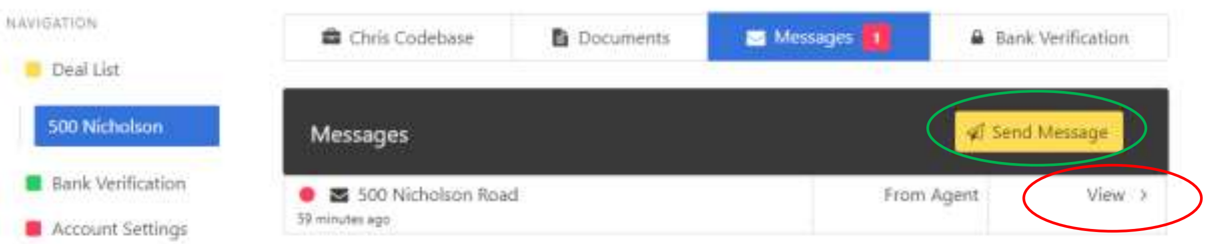
Sent by SettsHub.

When the client then next logs into the Hub and highlights the deal in the Deal List, the following screen will appear and they will be able to see there is a message waiting for them signified by the number 1 in the little RED square beside the Messages tab.

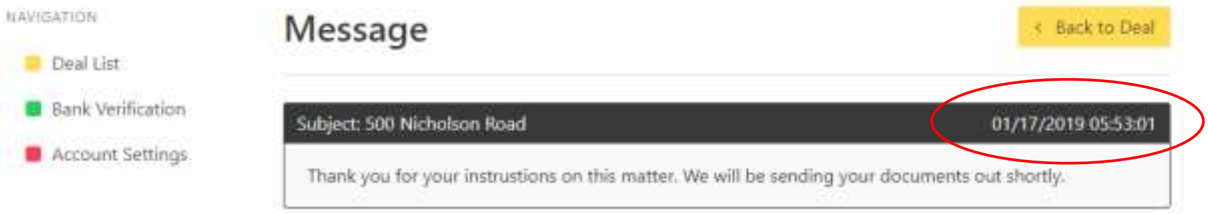


By clicking on the Messages tab, they will then see there is an unread message waiting for them as shown below and by clicking on View, the message will open on screen.



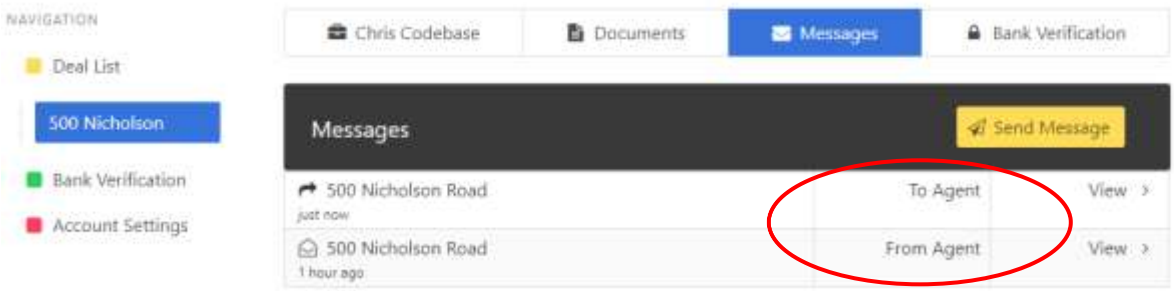
They will now be able to read the message, an example of which follows and the time and date it was sent appears in the top right-hand corner of the message.

Having read the message, if they do not wish to do anything else, they simply click on the Back to Deal button to return to the home page. The RED dot on the message line will disappear and the envelope will be opened to show the message has been read



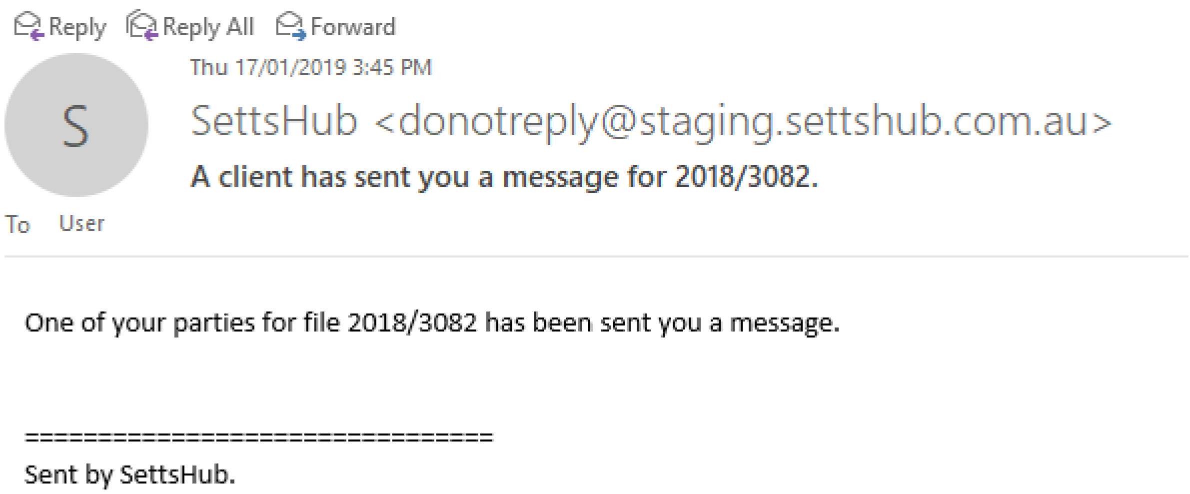
Should the client wish to respond to the message, he can select the Send Message button shown in GREEN in the screenshot above the message, compose the message and select Send. An example of the reply is shown below:

The result of this will be that the client can see the string of messages that have been received and sent on the subject matter and the labelling will clearly show whether the message was received or sent as shown below:

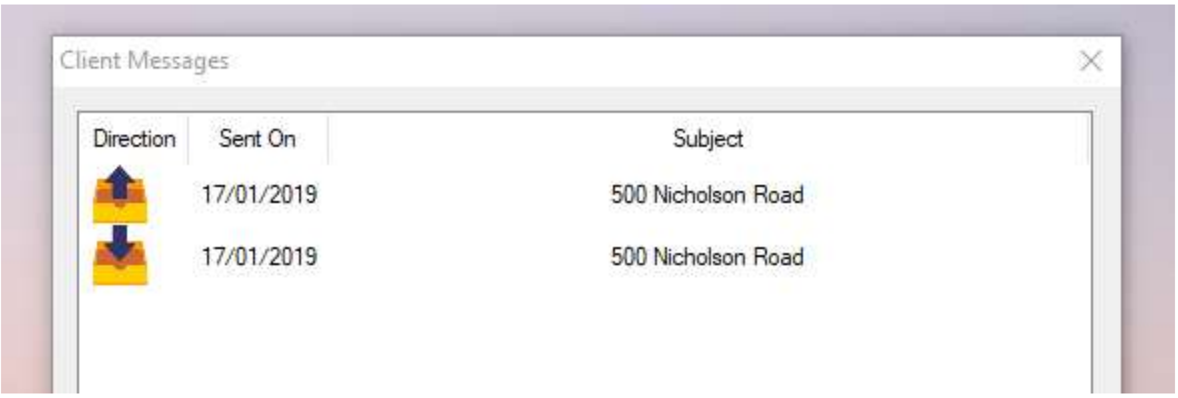


As can be seen, both messages appear on the message list with clear indications as to the source of the message and whether they have been read.

You, as the conveyancer, will also receive an email notification that you have received a message from one of your parties/clients and the file that it relates to similar to that below.



and be able to see and read the string of messages that have been sent in either direction by clicking on the Current Matter icon and selecting Messages and the following is an example of the information that will appear on the screen. By double clicking on any of the messages, they will open on screen for you to read.



This information can also be found by having the relevant file active on your screen, select the Seller/Buyer Details icon, highlight the client, click on the View on Hub button and select Messages.

DOCUMENTS

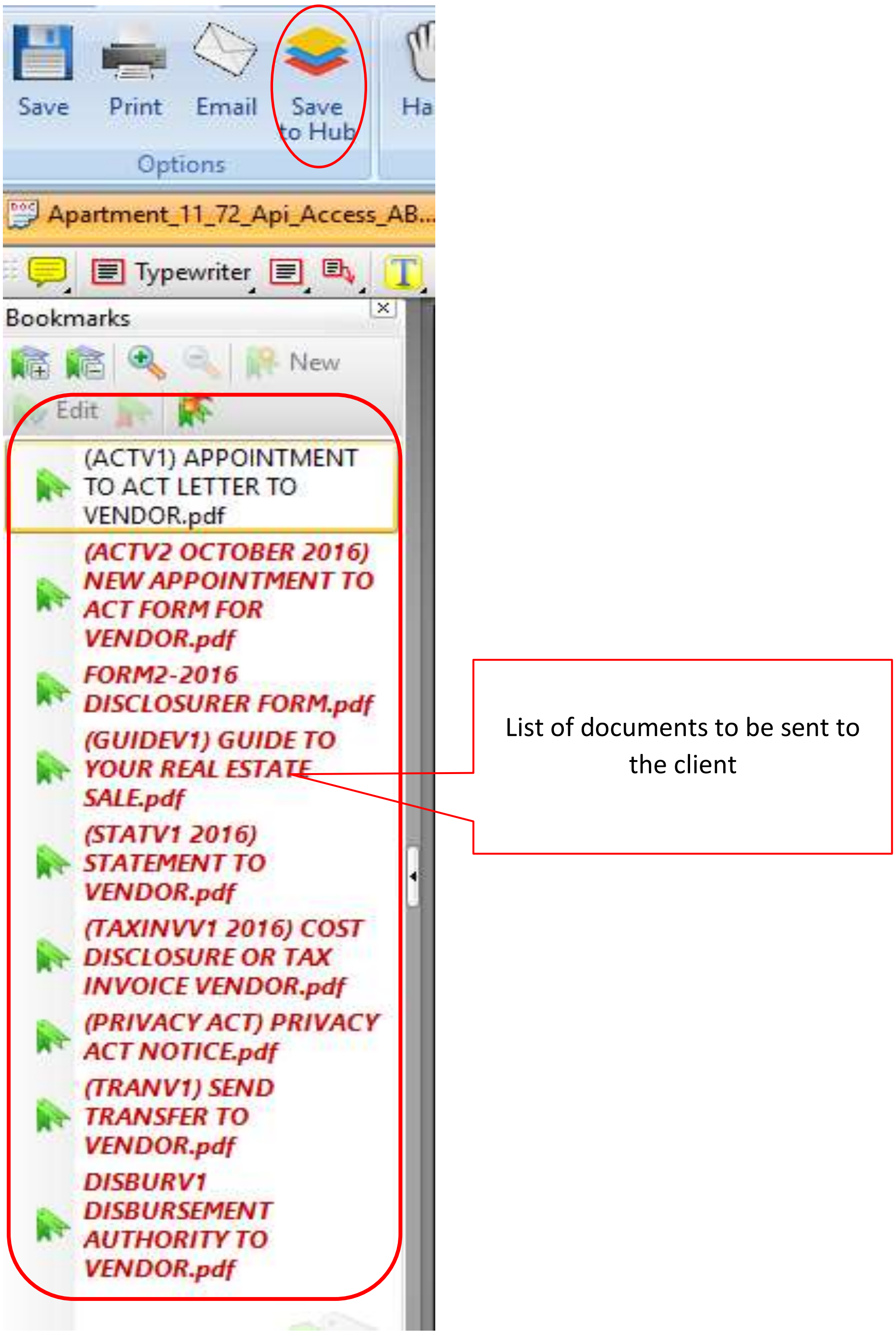
The process of getting documents to your clients is very similar to the method many of you are using at present.

Having processed the necessary documents and saved them as PDF’s in your Notepad, open the Notepad and select the entries you wish to send by ticking the selection box at the end of the line, click on the Open button to bring up the expanded list of documents, i.e. the documents plus the attachments that you processed.

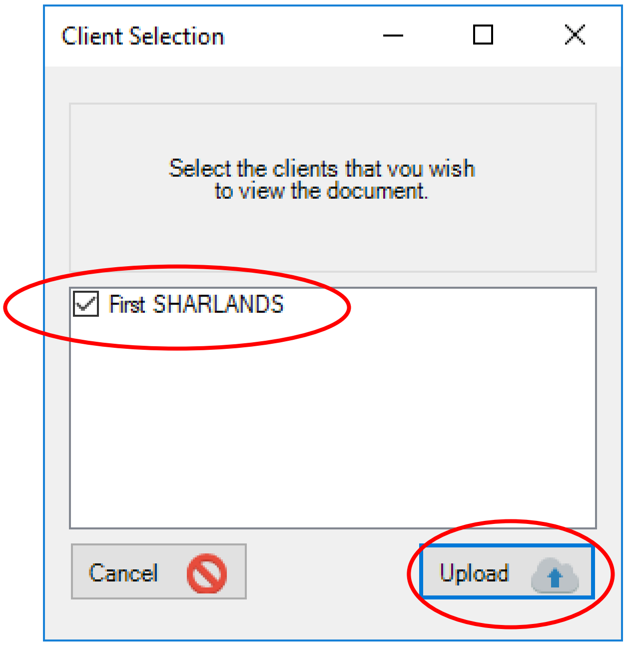
At this point you can tailor the list and remove any items you do not wish to send by unticking any of the items on the list and rearrange the order as you wish by highlighting any of the listed items and use the Up or Down arrow to get them into a more reasonable position.

Once you are happy with what is to be sent to the client, click on the Generate button to create a single PDF of all the selected documents and they will open in plain text on the screen, the list of documents will appear in the left-hand column.

Then select the Save to Hub button.



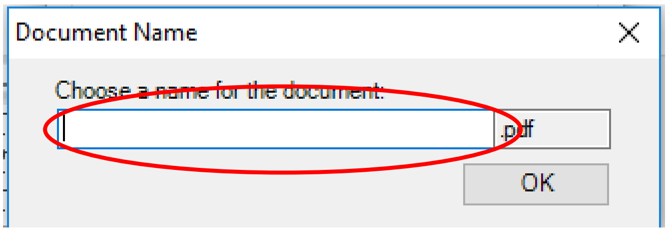
A client list will appear.



In this example, there was only the one client. Should you have multiple clients that you want to send the document, provided they have separate email addresses, their names will appear on the list for you to select from as required. Any clients listed that are not ticked on the list will not be able to see the documents. This can also be changed at any time.

Before the documents upload to the Hub, you will be prompted to name the PDF file so the client will be able to see that it is a real entry.

You will also be able to type a message for the client to view.



During the uploading process, the documents will be encrypted as a security measure.

This will then trigger a message to the client, (as shown below), that there are documents on the Hub ready for him to action and requesting him to Login and print them off as necessary.

In time to come, we envisage an ability to sign the documents within the Hub as well as upload.

Reply Reply All Forward

Thu 17/01/2019 4:46 PM

SettsHub <donotreply@staging.settshub.com.au>

Your Conveyancer Has Uploaded a New Document For You

To User

Your conveyancer has uploaded a new document to SettsHub in relation to your settlement.
Please visit SettsHub to view the document.

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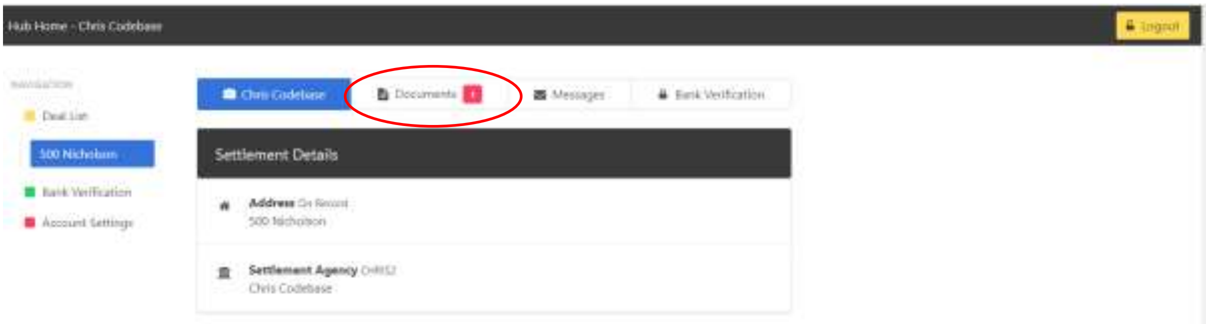
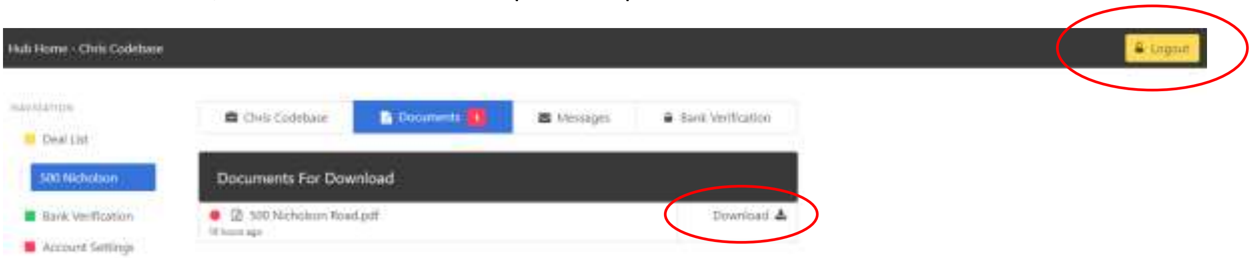
Sent by SettsHub.

When the client does log into the Hub again, as shown previously, selects the matter in question if they have multiple deals on foot, they will see there are Documents for Download, signified by the number in the RED square on the Documents tab.



When the tab is selected, they will see a screen similar to the following and by then selecting the Download button, the documents will be opened in plain text on their screen.



Once the client has completed what he wants to do at this time, he can then hit the Logout button to exit the Hub.

As the conveyancer, you will be notified by email to alert you that the documents for a particular file have been downloaded similar to that shown following

Reply Reply All Forward

Fri 18/01/2019 9:30 AM

S

SettsHub <donotreply@staging.settshub.com.au>

A document has been read for 2018/3082.

To User

One of your uploaded documents for file 2018/3082 has been downloaded by a party.

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Sent by SettsHub.