

### 1 CHECK YOUR PROFILE

Be sure that the information in your profile is complete and correct. Your profile remains the same from one file to another.

### 2 READ THE MESSAGES

Be sure to read the messages sent by TELUS through Assyst Real Estate. These messages are archived after a first reading and are accessible through **Messages** button. Messages include general information and are not linked to a file.

### 3 CHECK YOUR NEW FILES

Your new files appear in green at the top of the list of files.

You have 2 business days to accept or refuse a new file. If you do not accept a file within this time it will be sent back to the financial institution and redirected to another professional.

#### 4a ACCEPT A NEW FILE

You accept the new file and pay charges. You can start processing the file and complete the information.

#### 4b REFUSE A NEW FILE

If you cannot handle the file, refuse it and it will be returned back to the financial institution.

### 5 REVIEW THE SPECIFIC MANDATE

Read the information available in the Specific Mandate, in addition to the rules and procedures, and instructions to the notary.

### 6 READ YOUR NOTES

Assyst Real Estate automatically sends a note to advise you there has been a change to one of your files. Make sure to always read these notes as soon as you get them. They can include modifications that may change the nature of your file (ex: addition of a borrower).

### 7 COMPLETE THE FILE INFORMATION

Assyst Real Estate provides you with all the information from the lender but you need to confirm and / or add some information in the following sections:

- Borrower(s) information
- Property address
- Legal description
- Previous creditors (if needed)

### 8 COMPLETE THE FUNDING DATE AND ANY OTHER DATES

A couple of days before the signature of the documents by the customer, complete the funding date, as well as the interest adjustments, first and last payment dates. This information is used in the Loan Contract and in the Cost of Borrowing. However, concerning Laurentian Bank, you have to complete the Funding field only; the other fields will be calculated automatically.

### 9 GENERATE AND SIGN THE PRELIMINARY REPORT

Complete the preliminary report as soon as you have the required information. Only one preliminary report per file can be electronically signed and sent to the financial institution through Assyst Real Estate.

### 10 BLOCK THE ACCESS TO THE CREDITOR

To avoid last minute changes, you have to freeze the information on the system. To block the access to the lender, respect the following delays:

- For *Desjardins*: Block the access 2 business days before the signature of the mortgage deed. The access is immediately blocked.
- For the Banks: Ask for the Cost of Borrowing 3 business days before the signature of the documents. The bank has one business day to modify the file then the access is blocked.

### 11 GENERATE YOUR DOCUMENTS

Generate the required documents. For every file, only the appropriate documents are displayed in the Documents tab.

### 12 REGISTER YOUR DOCUMENTS ONLINE

Your mortgage deeds and discharge documents that are generated through Assyst Real Estate can be registered online, using the digital signature.

### 13 GENERATE AND SIGN THE FINAL REPORT

Generate the final report when the file is completed. Only one final report per file can be electronically signed and sent to the financial institution through Assyst Real Estate.

### 14 CLOSE THE FILE

Make sure to gather the information you wish to keep before closing the file. Once closed, the file is removed from the list of your files.

#### Online Publication

### CREATE A FILE TO IMPORT DEEDS WITH ASSYST REAL ESTATE BOOKMARKS

Create a file on Assyst Real Estate to register online one or several imported documents. Use the templates with Assyst Real Estate bookmarks that are available on the Inforoute Notariale. For more information, refer to the User Guide for the Assyst Real Estate Toolbar.