

Submitting an application for settlement

It's different from CQ!

You must submit your application to settlements THROUGH THE DRIVEONLINE SYSTEM.

Previously you would email the settlement team with your documents when you were using CQ.

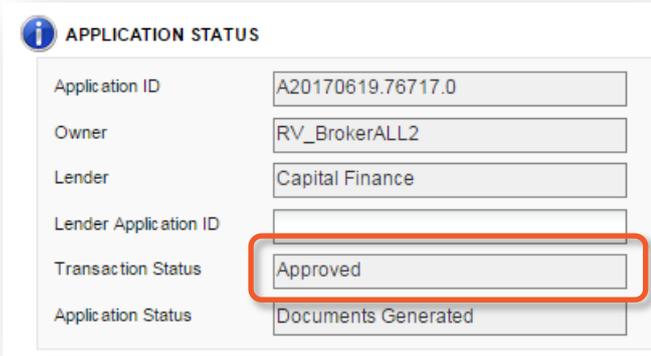
When using DriveOnline to submit applications, there is a different process. This is because the settlement team do not have access to DriveOnline to see your application.

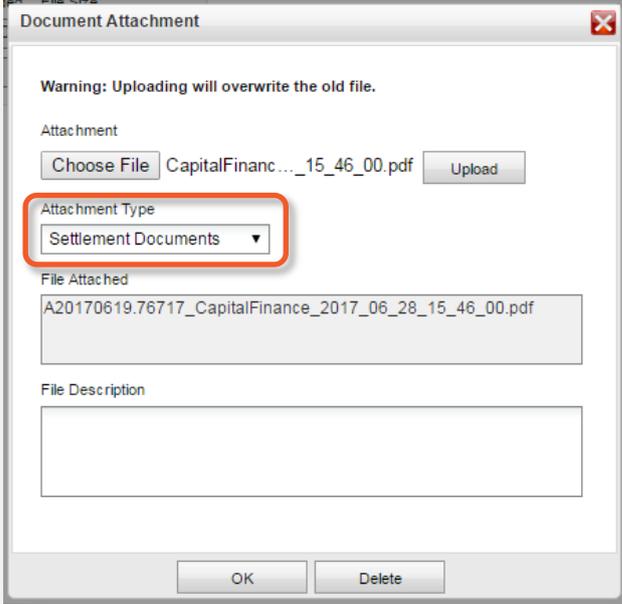
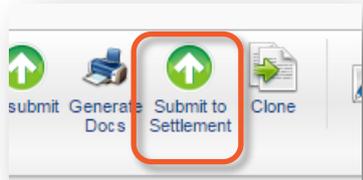
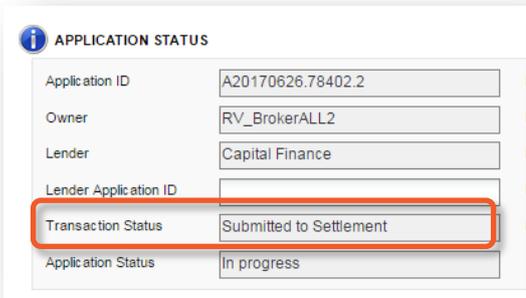
When do I submit to settlement?

Once you have your complete settlement document pack you can submit to settlements using the steps below. Key points to note:

- You can submit to settlement when the transaction status is approved
- You can add new attachments to DriveOnline while the application is locked and with settlements **but you must click resubmit to settlement** for the documents to be sent to the settlement team.
- If the settlement team need you to amend your application, they will email you with details and unlock the application
- **Do not submit two documents with the same file name.** If you're resubmitting the same document again, change the name to include the version or the date.

How to submit to settlement

Step	Screenshot
1. Ensure the application has been approved by the credit team	 <p>The screenshot shows a window titled 'APPLICATION STATUS' with an information icon. It contains a list of fields and their values: Application ID (A20170619.76717.0), Owner (RV_BrokerALL2), Lender (Capital Finance), Lender Application ID (empty), Transaction Status (Approved), and Application Status (Documents Generated). The 'Approved' value in the Transaction Status field is highlighted with a red rectangular box.</p>

Step	Screenshot																		
<p>2. Upload your documents in the Supporting Documents screen. Make sure you 'tag' the documents with Settlement Documents.</p> <p>If you need to delete documents after uploading, click the red X on the right hand side.</p>	  <table border="1" data-bbox="622 1003 1268 1153"> <thead> <tr> <th>File Name</th> <th>Attachment Type</th> <th>File Description</th> <th>Date Uploaded</th> <th>File Size</th> <th></th> </tr> </thead> <tbody> <tr> <td>A20170619.76717_Privacy doc</td> <td>Signed Privacy Consent</td> <td></td> <td>28/06/2017</td> <td>12.33 KB</td> <td></td> </tr> <tr> <td>A20170619.76717_CapitalFina</td> <td>Settlement Documents</td> <td></td> <td>06/07/2017</td> <td>811.557 KB</td> <td></td> </tr> </tbody> </table>	File Name	Attachment Type	File Description	Date Uploaded	File Size		A20170619.76717_Privacy doc	Signed Privacy Consent		28/06/2017	12.33 KB		A20170619.76717_CapitalFina	Settlement Documents		06/07/2017	811.557 KB	
File Name	Attachment Type	File Description	Date Uploaded	File Size															
A20170619.76717_Privacy doc	Signed Privacy Consent		28/06/2017	12.33 KB															
A20170619.76717_CapitalFina	Settlement Documents		06/07/2017	811.557 KB															
<p>3. Click Submit to Settlement.</p>																			
<p>4. On the details screen, you'll notice that the transaction status has updated to Submitted to Settlement.</p>	 <table border="1" data-bbox="683 1579 1209 1877"> <thead> <tr> <th colspan="2">APPLICATION STATUS</th> </tr> </thead> <tbody> <tr> <td>Application ID</td> <td>A20170626.78402.2</td> </tr> <tr> <td>Owner</td> <td>RV_BrokerALL2</td> </tr> <tr> <td>Lender</td> <td>Capital Finance</td> </tr> <tr> <td>Lender Application ID</td> <td></td> </tr> <tr> <td>Transaction Status</td> <td>Submitted to Settlement</td> </tr> <tr> <td>Application Status</td> <td>In progress</td> </tr> </tbody> </table>	APPLICATION STATUS		Application ID	A20170626.78402.2	Owner	RV_BrokerALL2	Lender	Capital Finance	Lender Application ID		Transaction Status	Submitted to Settlement	Application Status	In progress				
APPLICATION STATUS																			
Application ID	A20170626.78402.2																		
Owner	RV_BrokerALL2																		
Lender	Capital Finance																		
Lender Application ID																			
Transaction Status	Submitted to Settlement																		
Application Status	In progress																		

Please note: resubmissions to settlement follow the same steps.

