e-dealing Roadmap

1. Create *e-dealing*	2. Prepare Instruments	3. Create an A&I Form	4. Certify & Sign Instruments	5. Settle & Release	6. Submit *e-dealing*
***e-dealing* steps:** Enter a client reference(s) Add default PCs and CPs Enter instrument details Enter role details	***e-dealing* steps:** Select the instrument Click Prepare... to display the instrument screen for the type of instrument you select Enter details of the discharge Enter details of the transfer Enter details of the mortgage Pre-validate the instrument	***e-dealing* steps:** Select the type of A&I form Edit client details Complete other details for instruments Preview and print or save the A&I form	***e-dealing* steps:** Review and certify instrument details Sign one or more instruments View details of signed instruments	**Workflow Guidance step 7 (outside the *e-dealing* process):** Complete Settlement ***e-dealing* steps:** Release instruments	***e-dealing* steps:** Preview and Pre-validate the *e-dealing* Submit the *e-dealing* Receive confirmation Submit