



e-dealing QUICK REFERENCE CARD INDEX

FOR LANDONLINE VERSION 3.7

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e-dealing

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An e-dealing is an electronic conveyancing transaction using Landonline. The steps are similar to processing a paper-based dealing. Refer to the e-dealing Roadmap on the next page.

Within Landonline you:

- > Create the e-dealing (single party or multi party).
- > Prepare instruments in the e-dealing.

Your e-dealing can be a combination of any instruments available in the drop down list in the Create Dealing screen. (Refer to Online Help or the e-dealing User Guide for an authoritative list of the current e-dealing instrument types).

- > Certify and sign instruments using a digital certificate.
- > Release instruments (equivalent to “settle”).
- > Submit the e-dealing (starts the registration process).

Settlement is the only process performed outside of Landonline.


There are now two registration methods in which an e-dealing can be processed.

Auto Reg – Automatic Registration (Auto Reg) requires no manual intervention and is instantaneous if automated checks are passed.

Lodge – This means that the e-dealing transaction will require LINZ processing centre staff to check the information before the transaction can be registered.

You can order search products for titles and instruments in the e-dealing at submission. The information will be emailed to you on registration.

If there is a pending dealing that affects titles in your e-dealing you can elect to queue it.

The  Help button has been added to every e-dealing screen to enable easy access to associated help topics.

INFO

Continued on the next page... A 1

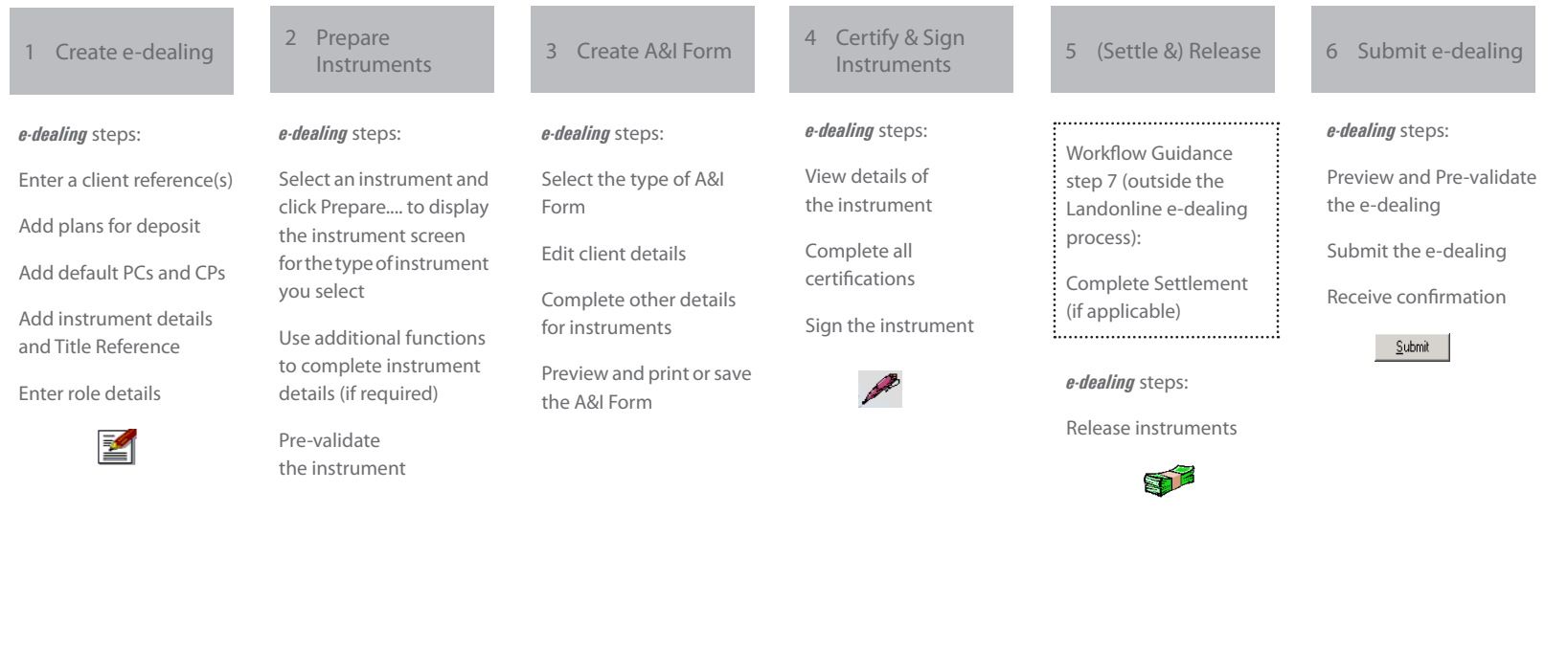


A 1.1 *e-dealing* ROADMAP

NZLS WORKFLOW GUIDANCE STEPS

1 2 3 4 5 6 7 8 9 10 11

e-dealing ROADMAP



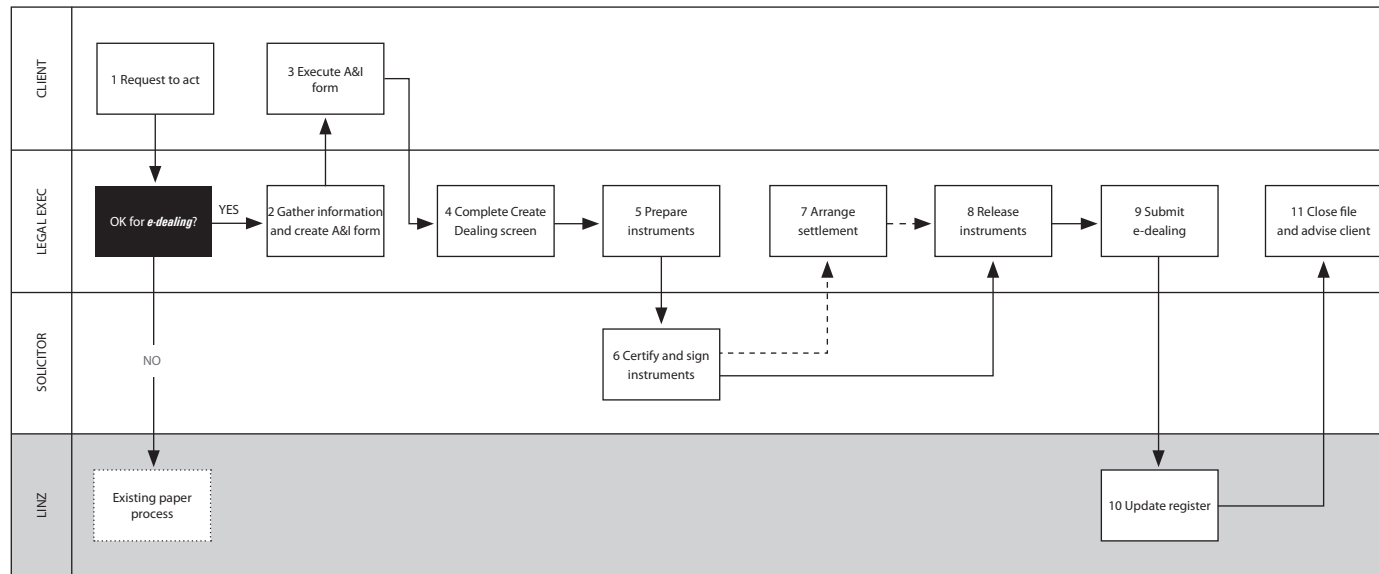


A 1.2 SINGLE PARTY PROCESS



FOR LANDONLINE VERSION 3.7

HIGH LEVEL SINGLE PARTY *e-dealing* PROCESS (EG. A REFINANCE)





A 2 AUTHORITY & INSTRUCTION (A&I) FORM

A Client Authority & Instruction (A&I) form provides authority for a conveyancing professional to act on behalf of a client in the e-dealing environment.

Information for the A&I form can be found in the standard paper-based conveyancing file.

Complete an A&I form for:

- > All instruments that require an A&I. (Refer to e-capable instruments on the Landonline website.)

Attach any other documents required to evidence the certifications to the A&I form.

Request the client to execute the A&I form which gives authority for the conveyancing professional to act for the client in the e-dealing. This should be before certifying and signing any instruments in an e-dealing.

Retain A&I forms and any other documents in support of certifications (eg bank letter of instruction) for review purposes (for a Statutory period of 10 years).

The A&I form may be completed using:

- 1 The Landonline A&I functionality which will create the A&I form using information entered at the time the instruments are prepared; or
- 2 Your established processes or precedents.

The NZLS e-dealing Guidelines and the A&I forms are available to download or print off the NZLS website at www.propertylawyers.org.nz/.

A&I forms are available for private individual, private corporate and public corporate.







A 3 WORKSPACE STATUS ICONS




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e-dealing AND INSTRUMENT STATUS ICONS

e-dealings and instruments change status as they progress through the Conveyancing Process. You can tell the status of an e-dealing or instrument by the icon that displays next to it in the Workspace Tree.




ICON	DESCRIPTION
 Draft	The Draft icon displays when an e-dealing or instrument has been created, and when an instrument has been prepared.
 Part Signed	The Part Signed icon displays when an instrument has multiple Conveyancing Professionals (CPs) and the instrument has been signed by at least one but not all CPs.
 Signed	The Signed icon displays when an instrument has been certified and signed.
 Released	The Released icon displays when an instrument is released, or when all instruments in an e-dealing have been released.

REQUEST STATUS ICONS

ICON	DESCRIPTION
 Draft	The Draft icon displays when a request has been created and saved.

ICON	DESCRIPTION
 Sent	The Sent icon displays when a request has been sent.
 Completed	The Completed icon displays when a request has been completed. This icon will only display in the folder for a linked e-dealing that has yet to be finalised (eg Registered).

WORKSPACE *e-dealing* STATUS FOLDER ICONS

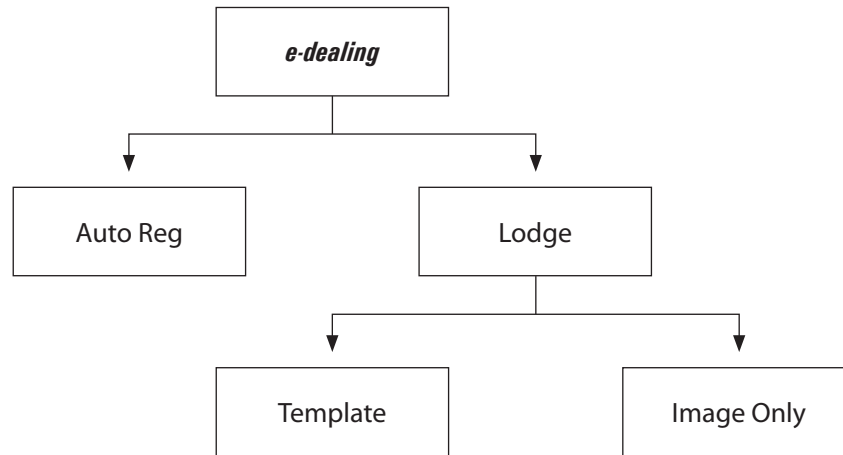
ICON	DESCRIPTION
 Lodged	The Lodged icon displays when an e-dealing has been submitted but not yet registered. These dealings will be one of the following: > Submitted and queued Auto Reg e-dealings > Submitted e-dealings which have a status of Lodge > Re-submitted requisitioned e-dealings.
 Requisitioned	The Requisitioned icon displays when an e-dealing has been submitted and LINZ has requisitioned one or more of the instruments.
 Rejected	The Rejected icon displays when an e-dealing has failed registration. The e-dealing will display with a new dealing number. Note: This icon also displays for e-dealings that are withdrawn and refused.



A 4 METHODS OF REGISTRATION



FOR LANDONLINE VERSION 3.7



There are two methods in which an e-dealing can be processed...

AUTO REG

Automatic Registration (Auto Reg) requires no manual intervention and is instantaneous if automated checks are passed.

LODGE

This means that the e-dealing transaction will require LINZ processing centre staff to check the information before the transaction can be registered. Within this there are two further methods...

Template

This sub group of Lodge has a template that you enter details in to, as you do in a standard e-dealing, but it may be necessary to add clauses. You can do this by adding text or attaching an image to your instrument. The instrument will require LINZ processing centre staff to check the information before the dealing can be registered.

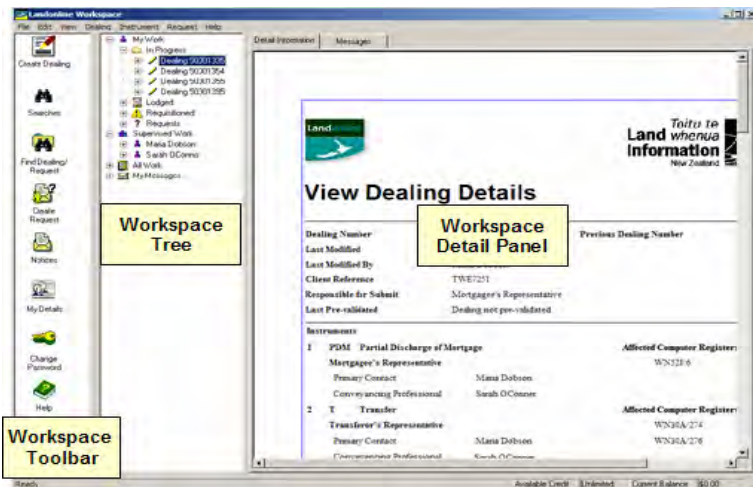
Image Only

This sub group of Lodge will require you to attach an image of the normal paper form (eg a form approved by Registrar General of Land or prescribed in legislation). There is no template for you to complete.

Workspace displays every time you log on to Landonline.


Workspace has three main areas:


- > Workspace Toolbar
Use the icons in the Workspace Toolbar to access parts of Landonline.
- > Workspace Tree
Expand the Workspace Tree to access transactions and messages.
- > Workspace Detail panel
Use the Workspace Detail panel to view transactions and messages.




WORKSPACE TREE

The Workspace Tree lists all transactions your firm is currently working on. These are displayed in four main folders:

- >  My Work
Displays all work for which you are a Primary Contact. To see the instruments you are working on expand the tree. They are categorised in the following sub-folders:

- >  In Progress
Displays all draft e-dealings that have yet to be submitted. This folder can also contain Rejected, Withdrawn and Refused e-dealings. These e-dealings will be returned with new dealing numbers.

- >  Lodged
Displays e-dealings that have been submitted but are not yet registered.

These e-dealings will be one of the following:

- > Submitted and queued Auto Reg e-dealings
- > Submitted e-dealings with a status of Lodge
- > Re-submitted requisitioned e-dealings

You cannot edit these e-dealings or instruments, but you can view the instruments in the Workspace Detail panel if you select them in the Workspace Tree.

Continued on the next page... B 1



> Requisitioned

Displays submitted e-dealings in which LINZ has requisitioned one or more instruments. You can edit these e-dealings and instruments.

The status of requisitioned instrument(s) in the e-dealing will be Requisitioned. Any instrument not requisitioned will have a status of Released.

> Requests

Displays draft and sent requests created by your firm. Requests are automatically removed from this folder when completed. When a completed request is linked to an e-dealing that is still in Workspace, the request will remain in the linked e-dealing folder until you submit the e-dealing.

> Supervised Work


Displays the names of all Primary Contacts who are working on e-dealings for which you are the Conveyancing Professional. These are further categorised in the subfolders, described above, for each Primary Contact.

> All Work

Displays the names of all people in your firm with a Landonline Digital Certificate.

To see the work a person is involved with, click .

> My Messages

Displays a list of messages sent to you about transactions. These messages can have attachments.  My Messages Indicates a message has been added to your My Messages folder.

REFRESH WORKSPACE

You can refresh Workspace at any time to display the latest information and messages:

- 1 Select View | Refresh



YOU VIEW MESSAGES IN WORKSPACE IN THE:

- > Messages tab for a selected e-dealing or instrument.
- > My Messages folder for messages sent to you.

REFRESH

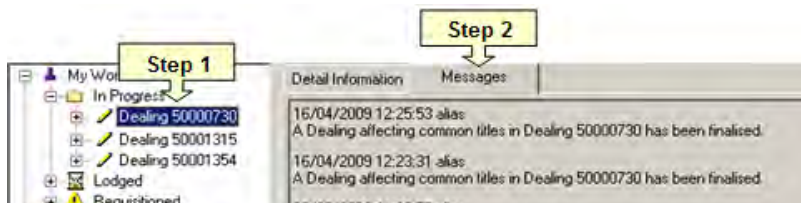
To view the latest messages in Workspace:

- 1 Select View | Refresh.

MESSAGES FOR A SELECTED *e-dealing* OR INSTRUMENT

To view messages:

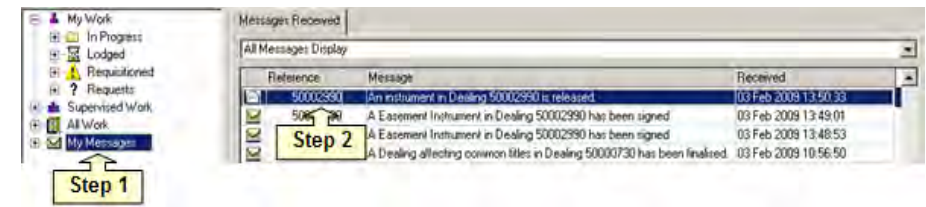
- 1 Select the e-dealing or instrument in the Workspace Tree.
- 2 Click the Messages tab in the Workspace Detail panel.



MY MESSAGES

To view messages in the My Messages folder:




- 1 Click the My Messages folder. The messages are listed in the Messages Received tab in the Workspace Detail panel.
- 2 Select the message you require to display the content and any associated attachments in the Details area.






MESSAGE ATTACHMENTS

To save a message attachment:

- 1 Select  for the message attachment in the Details area.
- 2 Click .
- 3 Specify the location on your computer where you want to save the attachment.
- 4 Click  to save.

When Landonline detects a new message, the My Messages icon in the Workspace Tree changes from  to .

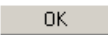


INFO



Information you can save for an e-dealing is:

- > The Detail Information of the e-dealing.
- > The Detail Information of each instrument in the e-dealing.
- > All messages for the e-dealing and instrument(s), and associated messages in My Messages.

To save information:



- 1 Select the e-dealing or instrument in the Workspace Tree.
- 2 Select File | Save As... A message displays advising you to individually save each page to a file if you want to save all details for the e-dealing.
- 3 Click  to display the UniPrint Preview screen.
- 4 Click  to display the Save As screen.
- 5 Specify the location on your computer to save the file to and click .

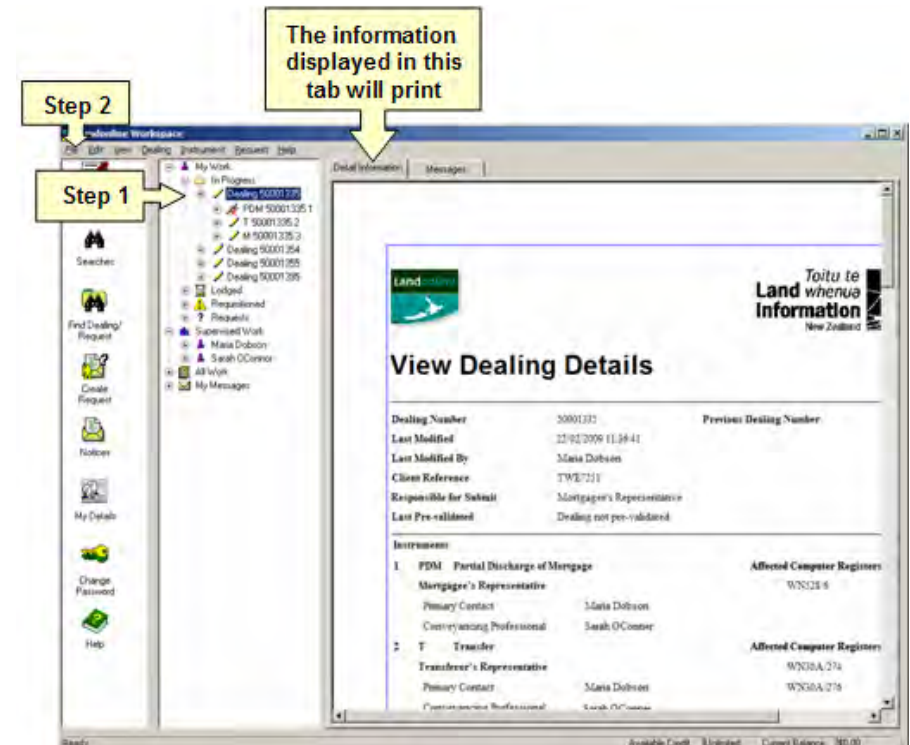


B 4 PRINT DETAILS

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To print the Detail Information of an e-dealing.

- 1 Select the item in the Workspace Tree.
- 2 Select File | Print... to display the UniPrint Preview screen.
- 3 Click  to display the Print screen.
- 4 Select your printer options.
- 5 Click 




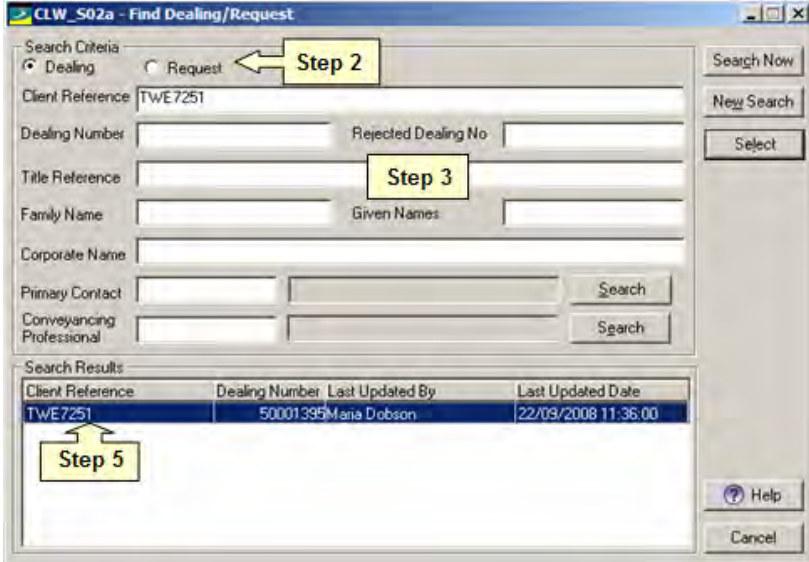


B 5 FIND DEALING/REQUEST

FOR LANDONLINE VERSION 3.7

To find an e-dealing or request:

- 1 Click  in the Workspace Toolbar area to display the Find Dealing/Request screen.
- 2 Select either Dealing or Request.
- 3 Enter your Search Criteria in at least one field (eg Dealing Number, Title Reference).
- 4 Click **Search Now** to display the results in the Search Results area.
- 5 Highlight the required e-dealing or request from the Search Results.
- 6 Click **Select** to locate the e-dealing or request in the Workspace Tree.
The Find Dealing/Request screen minimises and remains open.



CLW_S02a - Find Dealing/Request

Search Criteria

Dealing Request

Client Reference TWE7251

Dealing Number Rejected Dealing No

Title Reference

Family Name Given Names

Corporate Name

Primary Contact Search

Conveyancing Professional Search

Search Results

Client Reference	Dealing Number	Last Updated By	Last Updated Date
TWE7251	50001395	Maria Dobson	22/09/2008 11:36:00

Buttons: Search Now, New Search, Select, Search, Search, Help, Cancel

After performing a search, you must maximise the Find Dealing/Request screen if you want to select another Dealing Number or Request from the Search Results area or perform a new search.

Click **Cancel** to close the Find Dealing/Request screen.



INFO



CHANGE YOUR CONTACT DETAILS

The Contact Details tab in the Maintain User screen defaults to a single postal or email address. If you are associated with more than one firm you can choose to record a separate postal and email address for one or more of your associated firms. Where an address has not been defined for an associated firm, your Default address will apply.

In Workspace:

- 1 Click  to display the Maintain User screen.
- 2 Change your Preferred Name and any other contact details as required in the Contact Details tab.
- 3 To update an address for notices for an associated firm:
 - > Uncheck the Use default address for all associated firms checkbox in the Contact Addresses for Notifications area.
 - A message displays to warn you that any addresses defined here for other firms will now be used for notices instead of your default address. Click 
 - > Select the name of the firm in the Address when associated with firm field drop down list to display address details for the selected firm.
 - Select the Default option in the drop down list to view or update details of your default address (if required).
 - > Enter or change contact address details for notices related to the selected firm.
 - > Select another firm in the Address when associated with firm field (if required) and update contact details for that firm.
- 4 Select File | Save to save your changes.

Your Preferred Name is used on all notices sent to you from Landonline.

The Address when associated with firm field displays all firms you are associated with and will default to the firm with which you are currently logged in under.

You don't have to be logged in under a firm to change their notice address details.



CHANGE YOUR PREFERENCES



You set your preferences and link a Primary Contact to a Conveyancing Professional using the Preferences tab in the Maintain User screen.

In the Maintain User screen:

- 1 Select the Preferences tab and change your preferences as required:
 - > Select Yes or No in the Warning of Lodgement Fee Charge area.
 - We recommend the default setting of Yes remains unchanged.
 - > Select whether the Display Post Registration Search screen displays when submitting your e-dealings (if you select not to have this screen display, the system will automatically submit your e-dealings without product search requests).
 - > Select your default Land District.
- 2 To link your name to a Conveyancing Professional (if you are a Primary Contact in a conveyancing firm):
 - > Select the firm in the Conveyancing Professional Firm field.
 - > Select the name of your preferred Conveyancing Professional in the Conveyancing Professional field.
- 3 Select File | Save to save your changes.

CHANGE YOUR PASSWORD

In Workspace:

- 1 Click  to display the Change Password screen.
- 2 Enter your old password in the Old Password field.
- 3 Enter your new password in the New Password field.
- 4 Enter your new password again in the Re-enter New Password field.
- 5 Click .

Your password must be between eight and twenty alphanumeric characters.

Your password should also contain at least one number, one lower case character and one upper case character.

INFO




B 7 CREATE AND SEND A REQUEST



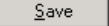

FOR LANDONLINE VERSION 3.7

CREATE AND SEND A REQUEST FROM WORKSPACE

You can create a request for title related matters from Workspace.

In Workspace:

- 1 Click  to display the Create Request screen.
- 2 Select the type of request in the Request Type field.
- 3 Enter the dealing number in the Dealing Number field or select the number from the drop down list (if required).
- 4 Enter or change the Client Reference(s) for the request, if required. Any client references previously entered for the selected e-dealing display here.
- 5 Change the name of the Contact Person (if required) and check the Email, Mobile Phone and Fax details are correct. You can change this information, if required
 - > If the name of the Contact Person does not display in the drop down list, enter the person's name and complete the Email, Mobile, Phone or Fax fields as appropriate.
- 6 Complete the following fields, as required. (The fields that display depend on the type of request.)
 - > Click in the Title Reference field to display the Enter Titles screen and select the titles affected by the request.
 - > Enter the date of settlement for the e-dealing in the Settlement Date field.
 - > Enter details about the request in the Notes/Comments field (if applicable). You can enter up to 2000 characters in this field.
 - > Check the Select checkbox in the Instruments area for each instrument you want to withdraw from the e-dealing.

- 7 Perform any other actions for the request if required:
 - > Click  to attach the image of a letter.
 - > Click  to print a copy of the request.
 - > Click  to save the request.
- 8 Click  to send the request.

The screenshot shows the 'Prepare Request' window with the following fields and values:

- Request Type:** Files - Correction/Prevent/Regulation (Step 2)
- Dealing Number:** 50001750
- Client Reference 1:** PAL2308
- Client Reference 2:** (empty)
- Contact Person:** Mava Dobson (Step 5)
- Email:** mdobson@becommes.co.nz
- Mobile:** (empty)
- Phone:** 04 555 6430
- Fax:** 04 963 1571
- Title Reference:** W430A/274 (Step 6)
- Settlement Date:** 15 Jan 2009
- Created Date:** 15 Dec 2008 09:33:07
- Last Modified By:** Mava Dobson
- Request Status:** Draft
- Firm:** M Dobson LT/Convey & Co
- Request ID:** 50000007

The Notes/Comments field contains the text: "Please amend CD40 Covenant so that the transfer to Title W430A/274 and W430A/276 can proceed."



B 7 CREATE AND SEND A REQUEST

FOR LANDONLINE VERSION 3.7

CREATE AND SEND A REQUEST FROM THE CREATE DEALING SCREEN

To create and send a request in the Create Dealing screen:

- 1 Select Dealing | Requests to display the Select Request screen. Any uncompleted requests linked to this e-dealing display in this screen.
- 2 Click **Create Req...** to display the Create Request screen.
 - > To open an existing request linked to this e-dealing, select the request and click **Open Req...** to display the Create Request screen.
- 3 Follow the steps in Create and Send a Request from Workspace to complete and send the request.

The Dealing Number defaults to the current e-dealing.

If the request is not linked to the current e-dealing, enter a different dealing number or select the dealing number from the drop down list.

INFO

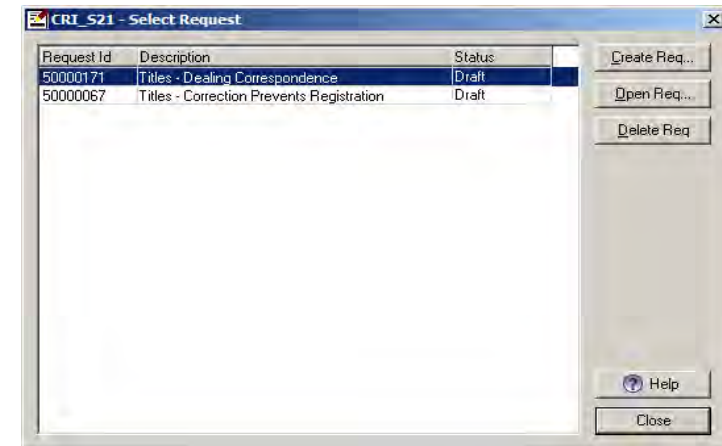
DELETE A REQUEST

In Workspace:

- 1 Select the request in the Workspace Tree.
- 2 Select Request | Delete.

In the Select Request screen:

- 1 Select the request in the list.
- 2 Click **Delete Req**



In the Create Request screen, the Settlement Date is a guideline for LINZ only and does not guarantee that the request will be completed by this date. The date entered cannot be more than 60 days in the future.

There are two title correction request types:

- > Titles - Correction - use when the correction is not urgent. It is optional to link this request to an e-dealing, but it must be linked to a title.
- > Titles - Correction Prevents Registration - use when an error will prevent settlement or prevent registration of the e-dealing. You must link this request to an e-dealing.

INFO



C 1 CREATE AN *e-dealing*

e-dealing:
Create an e-dealing
FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN


5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS


9 SUBMIT *e-dealing*


To create an e-dealing you need to know the instruments, affected titles and names of all representatives involved.

- 1 In Workspace, click  to display the Create Dealing screen.
- 2 Enter your client reference(s) in the Client Reference field(s).
 - > If you wish to have your name as the Primary Contact and your Conveyancing Professional appear automatically, check the Add Default PCs and CPs checkbox.
- 3 In the Instruments area:
 - > Enter an instrument code in the Type field (eg DM, T, M), or select the Description of the instrument from the drop down list in the Description field or click **Select Inst ...**
 - > Click or tab to the Title Ref field. This opens the Enter Titles screen where affected titles are entered.
 - > Review the default entry in the Parties field (change if required).
- 4 Click **Add Inst** to insert additional rows in the instruments area.

> Repeat Steps 3 and 4 for each instrument in the e-dealing.

Note: If the e-certification column is not ticked then an instrument must be signed by relevant parties.

- 5 Complete the role details for each instrument:
 - > If the name has not been automatically added, enter the full name or user Id of the Primary Contact for each instrument, or click  to search for their name.

- > Enter or change the Conveyancing Professional name, if required, or click  to search for their name.
- 6 Amend the No. of CPs if required, (eg an Easement instrument that must be signed by four grantor representatives).

Type	Description	Instrument	Party	Status	Auto Reg	Attached
ZT	Transfer	✓	W143/441	Single	On	AUTO REG
3M	Mortgage	✓	W143/441	Single	On	AUTO REG

Instrument Role	Primary Contact	Conveyancing Professional	Party For Release	Sign For Eas	No. of CPs
Mortgage's Representative	May Sullivan	Richard Thompson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
Transferor's Representative	Maia Dobson	Sarah O'Connor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2
Mortgage's Representative	Maia Dobson	Sarah Anne McLeary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1

Continued on the next page... C 1



C 1 CREATE AN *e-dealing*

FOR LANDONLINE VERSION 3.7



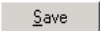
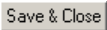
4 COMPLETE CREATE DEALING SCREEN


5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

- 7 Review the default role for Release and change if required. (The  icon displays beside the standard defaults and should only need changing in rare circumstances).
- 8 Review the default role for Fees. You may have different parties responsible for different instruments within the same dealing. (The  icon displays beside the standard defaults and should only need changing in rare circumstances).
- 9 Review the Default Submitting Firm – this cannot be changed. However in exceptional circumstances the Submitting Firm field may be changed.
- 10 Click  to save a partially completed e-dealing without closing the screen.
- 11 Click  to save the dealing and close the screen.

Once you have successfully created your e-dealing, prepared your instruments and saved the e-dealing information you can click  to create, preview, print or save the A&I form (see C4 for further instruction on A&I forms).

Fields marked with a red * are mandatory and must be completed.

INFO

DELETE AN *e-dealing*

- 1 Select the e-dealing in the Workspace Tree.
- 2 Select Dealing | Delete.

All instruments in the e-dealing are also deleted.

Only the Primary Contact or Conveyancing Professional responsible for submitting can delete an e-dealing.

INFO



C 1.1 CREATE AN *e-dealing*: NEW TITLES

FOR LANDONLINE VERSION 3.7


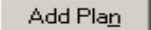
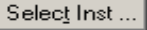
4 COMPLETE CREATE DEALING SCREEN

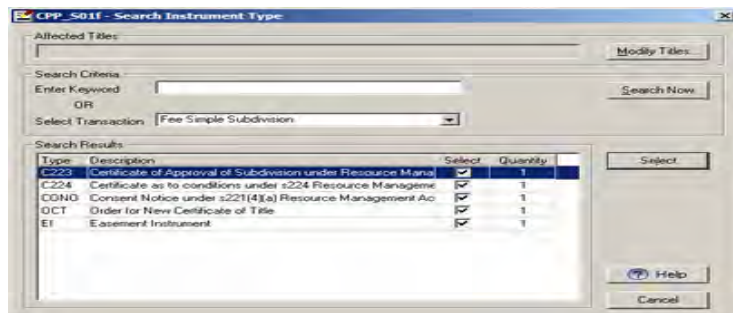
5 PREPARE INSTRUMENTS

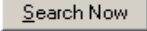

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

- 1 In Workspace, click  to display the Create Dealing screen.
- 2 Enter your client reference(s) in the Client Reference field(s).
- 3 In the Plans for Deposit area:
 - > Click 
 - > Enter the Survey Plan No. (the default type is **LT** for other plan types select from the drop down menu).
 - > If you wish to have your name as the Primary Contact and your Conveyancing Professional appear automatically, check the Add Default PCs and CPs check box.
- 4 In the Instruments area click  to open the Search Instrument Type screen (if required).



- > To search using a keyword, enter one or more words in the Enter Keyword field (eg Resource Management, Mortgage, etc). If you enter multiple words Landonline performs an exact match search.
 - > To search using a transaction type, select the type in the Select Transaction field drop down list (eg Fee Simple Subdivision).
 - > Click  to return search results for your selection. Check or uncheck instruments as required to indicate your selections. You can also change the Quantity of instrument types.
 - > Click  to close this screen.
- 5 The selected instruments will be added to the Create Dealing screen.
 - > Click or tab to the **Title Ref** field. This opens the **Enter Titles** screen where the affected titles are entered. Any pre-allocated titles will appear automatically but will require you to check the Affected checkbox.
 - > Review the default entry in the Parties field (change if required).

In the Search Instrument Types screen:

- > Searching by Keyword returns results in alphabetical order. None of the results are selected.
- > Searching by Transaction returns results in a pre-defined order and all are selected.

INFO



C 1.1 CREATE AN *e-dealing*: NEW TITLES

FOR LANDONLINE VERSION 3.7





4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

- 6 Click **Add Inst** to insert additional instruments (repeat as required).
- 7 Complete the role details for each instrument:
 - > If the name has not been automatically added, type the full name or user Id of the Primary Contact for each instrument, or click  to search for their name.
 - > Enter or change the Conveyancing Professional name, if required, or click  to search for their name.
- 8 Review the default role for Release and change if required. The  icon displays beside the standard defaults and should only need changing in rare circumstances.
- 9 Review the default role for Fees. You may have different parties responsible for different instruments within the same dealing. The  icon displays beside the standard defaults and should only need changing in rare circumstances.
- 10 Review the Default Submitting Firm – this cannot be changed. However in exceptional circumstances the Submitting Firm field may be changed.
- 11 Click **Save** to save a partially completed e-dealing without closing the screen.
- 12 Click **Save & Close** to save the dealing and close the screen.

The screenshot shows the 'Landonline - Prepare Dealing' window. At the top, there are fields for 'Dealing Number' (2007295), 'Last Modified' (Mata Dubois), and 'Date' (04 Feb 2009 10:36:45). Below these are 'Dealing Type' (MORTG) and 'Client Reference' (101254). A 'Step 2' callout points to the 'Client Reference' field. To the right, there are fields for 'Plan for Deposit for Pre-allocated Title' and 'Survey Plan No.' (20000004). A 'Step 3' callout points to the 'Survey Plan No.' field. Below this is a table 'Add Default PCs and CPs' with columns: 'Type', 'Description', 'Investigation Title Ref.', 'Party', 'Status', 'Auto/Judge', and 'Attached'. It contains three rows for 'CM' (Discharge of Mortgage), '2F' (Transfer), and '3M' (Mortgage). A 'Step 5' callout points to this table. Below that is a 'Roles' table with columns: 'Instrument Role', 'Primary Contact', 'Conveyancing Professional', 'Resp For Release', 'Resp For Fees', and 'No. of CPs'. It lists roles for 'Mortgage's Representative', 'Transferor's Representative', and 'Mortgage's Representative' for both 'Mortgage' and 'Transfer' instruments. A 'Step 7' callout points to this table. At the bottom, there are buttons for 'Add Inst', 'Previous', 'Certify & Sign', 'Sign', 'Help', 'Save', 'Save & Close', and 'Cancel'. A 'Default Submitting Firm' dropdown is set to 'Landonline U'Connor & Co'. A note at the bottom says 'Dealing not pre-validated'.



C 2.1 PREPARE A PARTIAL DISCHARGE AS TO PART OF A TITLE

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

This example uses a Partial Discharge as to part of the title to demonstrate the steps.

To prepare a Partial Discharge of Mortgage:

- 1 Select the Partial Discharge in the Create Dealing screen and click **Prepare...** to open the Prepare Discharge screen.
- 2 Select Part of Land/Complex mode to activate the **Description of Part** field (if applicable).
- 3 If there is only one mortgage on the title, that mortgage will display in the Affected Instrument No field. If there are multiple mortgages, select the mortgage to be discharged from the dropdown list.
- 4 Enter the description of land to be discharged.
 - > e.g. Lot 1 DP 1234 containing 145m2
 - > At this stage you can click **Add Image...** to attach an image (if required). For details on how to complete this process see page C2.2.4.
- 5 Review the Mortgagee name.
 - > Add or delete Mortgagee names, if required.
- 6 Only uncheck Reserve personal covenants for a discharge or partial discharge of mortgage if you do not need to protect the rights and remedies of the mortgagee.
- 7 Click **Save & Close** to save the Partial Discharge.

Note: To prepare a simple discharge follow the steps highlighted.

Note: To restore pre-populated names in the **Charge Holders** (eg Mortgagee) section of this screen click **Restore**

Continued on the next page... C 2.1



C 2.1 PREPARE A PARTIAL DISCHARGE AS TO PART OF A TITLE

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

The Change Due to Pending Dealing checkbox default is unchecked. When checked, the Charge Holder (eg Mortgagee) data window becomes editable and displays add and delete buttons.

Click **Pre-validate** before clicking **Save & Close**. This will check that all mandatory fields have been completed.

Check the Clarify Intent (if required) check box to activate the text field where any additional information can be added.

Click **Preview...** to review the instrument you have just prepared.

Fields marked with a red * are mandatory and must be completed.

INFO



C 2.2.1 PREPARE A TRANSFER: COMBINATION PROPRIETORSHIP

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

For an example of a Combination proprietorship, see the following pages.

To prepare a Transfer to a Combination of Joint Tenants and Tenants in Common:

- 1 Select the Transfer in the Create Dealing screen and click **Prepare...** to open the Prepare Transfer screen.
- 2 Review the Transferors' names. Check the Change Due to Pending Dealing box to edit the names.
- 3 Select Combination as the type of proprietorship.
 - > You can select Sole or Joint Tenants or Tenants in Common at this point.
- 4 In the Transferees area.
 - > Enter the first Transferee's name.
 - > Click **Add** to insert additional rows in the Transferees area.
 - > Check the **Joint** check box for everyone in that joint tenancy.
 - > Enter the share in the Share of Whole Title column for any tenant in common (shares must be shown as a fraction).
 - > Click **Alias/Other...** to add an alias, name suffix or show transferee as a minor.
- 5 Check the Fencing Covenant check box if it is a contractual requirement.
- 6 Click **Display Resulting Ownership** to check the transfer will have the intended effect.

The screenshot shows the 'Prepare Transfer' window in Landonline. The 'Transferors' section is empty. The 'Transferees' section is populated with three entries: Joseph Heenan (1/4 share), Annela Polunin (1/4 share), and Jonathan Polunin (1/2 share). The 'Proprietorship' is set to 'Combination'. The 'Fencing Covenant' checkbox is checked. The 'Display Resulting Ownership' button is highlighted with a yellow box and labeled 'Step 5'.

- 7 Click **Save & Close** to save the Transfer.

Note: To restore pre-populated names in the **Transferors'** section of this screen click **Restore**

Pre-validate before clicking **Save & Close**. This will check that all mandatory fields have been completed.

Fields marked with a red * are mandatory and must be completed.

INFO

Continued on the next page... C 2.2.1



C 2.2.1 PREPARE A TRANSFER: COMBINATION PROPRIETORSHIP

4 COMPLETE CREATE DEALING SCREEN

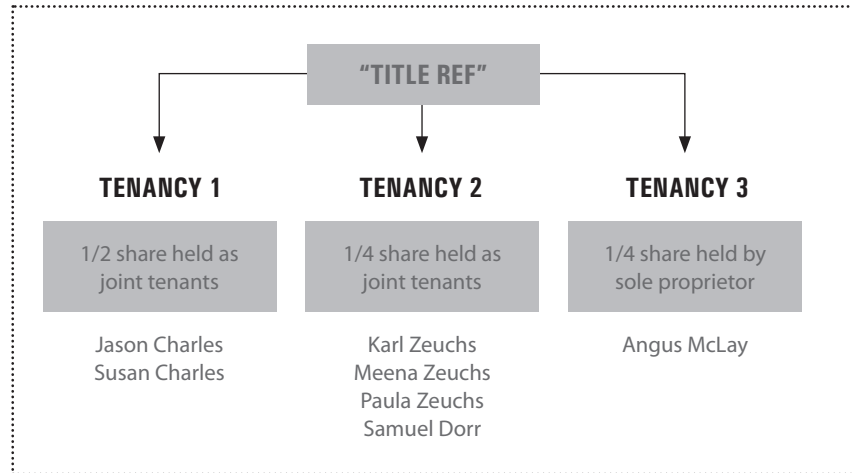
5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

Examples of a Combination proprietorship:



* Transferees						
<input type="radio"/> Sole or Joint Tenants <input type="radio"/> Tenants in Common <input checked="" type="radio"/> Combination						
Given Name(s)	Family Name	Alias/Other	Corporate Name	Joint	Share of Whole Title	
Jason	Charles	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
Susan	Charles	<input type="checkbox"/>		<input checked="" type="checkbox"/>	1/2	
Karl	Zeuchs	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
Meenan	Zeuchs	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
Paula	Zeuchs	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
Samuel	Dorr	<input type="checkbox"/>		<input checked="" type="checkbox"/>	1/4	
Angus	McLay	<input type="checkbox"/>		<input checked="" type="checkbox"/>	1/4	



C 2.2.2 PREPARE A TRANSFER: SHARE OR INTEREST

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

This example uses a Transfer of a Share or Interest to demonstrate the steps.

To prepare a Transfer of Part of Share or Interest:

- 1 Select the Transfer in the Create Dealing screen and click **Prepare...** to open the Prepare Transfer screen.
- 2 Select Share/Interest mode.
- 3 Review the **Transferors'** names. Check the Change Due to Pending Dealing box to edit the names (if required).
- 4 Check the box in the Transferor column to indicate whose share is affected.
 - > If part of an existing share is being transferred show that information in the Transferred Share of Whole Title column.
 - > Shares must be shown as a fraction of the whole title, not a fraction of the existing share.
- 5 Click **Display Transferor** to check the affected Transferor(s) details.
- 6 Select the type of proprietorship for the Transferee, the default is Sole or Joint Tenants.

- 7 In the Transferees area.
 - > Enter the Transferee's name.
 - > Click **Add** to insert additional rows in the Transferees area.
 - > Click **Alias/Other...** to add an alias, name suffix or show transferee as a minor.
- 8 Click **Display Transferee** to see the new proprietors' details.
- 9 Check the Fencing Covenant check box if it is a contractual requirement.
- 10 Click **Display Resulting Ownership** to check the transfer will have the intended effect.
- 11 Click **Save & Close** to save the Transfer.

Continued on the next page... C 2.2.2



C 2.2.2 PREPARE A TRANSFER: SHARE OR INTEREST

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

The screenshot shows the 'Prepare Dealing' window with the following details:

- Step 2:** Points to the 'Change due to Pending Dealing' section.
- Step 4:** Points to the 'Transfers' table with columns: Green (Name), Family Name, Alias / Corporate Name, Other, Transferor, Existing Share of % share title, Transferred Share of % share title, and Register.
- Step 7:** Points to the 'Transfers' table.
- Step 9:** Points to the 'Save & Close' button.

Green (Name)	Family Name	Alias / Corporate Name	Other	Transferor	Existing Share of % share title	Transferred Share of % share title	Register
Ronald-John Tweede	Tweede				1/3		Alter/Other
Brian Tweede	Tweede				1/3		Alter/Other
Michael John Harrison	Harrison				1/3		Alter/Other

Click **Pre-validate** before clicking **Save & Close**. This will check that all mandatory fields have been completed.

Click **Preview...** to review the instrument you have just prepared.

Fields marked with a red * are mandatory and must be completed.

INFO

Note: To restore pre-populated names in the Transfers' section of this screen click **Restore**



C 2.2.3 PREPARE A TRANSFER: WITH ADDITIONAL CLAUSES

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

ADD IMAGE

This example uses a Transfer containing additional clauses to demonstrate the steps using the Add Image functionality which demonstrates the Template method of Lodge dealings.

To prepare a Transfer with additional clauses:

- 1 Select the Transfer in the Create Dealing screen and click **Prepare...** to open the Prepare Transfer screen.
- 2 Select Part of Land/Complex mode.
- 3 Review the Transferors' names. Check the Change Due to Pending Dealing box to edit the names (if required).
- 4 Check the box in the Transferor column to indicate whose share is affected.
 - > If part of an existing share is being transferred, show that information in the Transferred Share of Whole Title column.
 - > Shares must be shown as a fraction of the whole title, not a fraction of the existing share.
- 5 Click **Display Transferor** to check the affected Transferor(s) details.
- 6 Select the type of proprietorship for the Transferee, this example uses Tenants in Common.

- 7 In the Transferees area.
 - > Enter the Transferee's name.
 - > Enter the Share of Whole Title (this will also be needed for Combination type).
 - > Click **Add** to insert additional rows in the Transferees area.
 - > Click **Alias/Other...** to add an alias, name suffix or show transferee as a minor.
- 8 Click **Display Transferee** to see the new proprietors' details.
- 9 Check the **Fencing Covenant** check box if it is a contractual requirement.
- 10 Click **Display Resulting Ownership** to check the transfer will have the intended effect.
- 11 Click **Add Image...** to attach the electronic file containing the additional clauses.
 - > See page **C2.2.4** for further steps on how to complete this process.
 - > The paper clip icon will appear once the file has been attached.
- 12 Click **Save & Close** to save the Transfer.

Continued on the next page... C 2.2.3



C 2.2.3 PREPARE A TRANSFER: WITH ADDITIONAL CLAUSES

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

The screenshot shows the 'Prepare Dealing' window with the following elements:

- Step 2:** Points to the 'Instrument No.' field.
- Step 4:** Points to the 'Description of Part or Item Estate to be Transferred' field.
- Step 7:** Points to the 'Additional Wording' field.
- Step 9:** Points to the 'Save & Close' button.
- Step 11:** Points to the 'Add Text...' button.

The interface includes sections for 'Transferees' and 'Transferees' with columns for Name, Family Name, Alias, Corporate Name, Existing Share of Whole Title, and Transferred Share of Whole Title. It also has a 'Disclaimer' section and a 'Pre-validate' button.

Note: To restore pre-populated names in the Transferees' section of this screen click **Restore**

Pre-validate before clicking **Save & Close**. This will check that all mandatory fields have been completed.

Click **Preview...** to review the instrument you have just prepared.

Fields marked with a red * are mandatory and must be completed.

INFO

Note: For a Transfer with a purpose, use Part of Land/Complex mode, eg a transfer to Her Majesty the Queen for scenic reserve. In this example you would:

- > Enter Her Majesty the Queen in the Corporate Name field in the Transferees area.
- > Click **Add Text...** to display the Add Text screen.
- < Enter details about the purpose, eg Held for purpose of scenic reserve.
- > Click **OK** to close the Add Text screen.

The instrument will step down to LODGE when saved. When you submit the e-dealing, LINZ staff will record the information you entered in the Add Text screen so that the purpose will display in the estate panel in the current structured text view of the Computer Register.

You can attach a file in a PDF or TIF format to your instrument.

When you select a PDF file, Landonline converts it to a TIF format before attaching it to your instrument. You should check the content of a PDF file once attached to ensure the information contained in it is correct.

To attach an image to your instrument:

- 1 Click **Add Image...** in the Prepare screen to display the Attach Image screen.
- 2 Click **Attach Image...** to display the Select File screen.
- 3 Go to the folder on your computer where you saved the file.
- 4 Select the file, then click **Open**
> You can also double click on the file to open.
- 5 Click **OK** to save the file to the instrument.

Note: For an Image Only Instrument follow the steps **highlighted**.

The paper clip icon will display next to **Add Image...** indicating that your file has been attached.

You can attach up to three images to any one instrument.

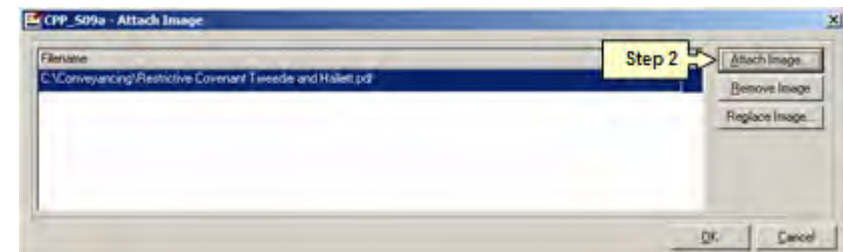
There is no need to convert a PDF file before attaching it to your instrument.

INFO

To attach an image to your instrument you must ensure it is in an acceptable format. This can be done using the Print-to-TIFF driver.

To convert your image into tiff format:

- 1 Open the electronic file you wish to convert.
- 2 Select File | Print and select 'Landonline' as your printer.
- 3 Select where you wish to save the file on your computer and rename it.
- 4 Click **Save**





C 2.3 PREPARE A MORTGAGE WITH ADDITIONAL CLAUSES

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

This example uses a Mortgage containing a Trustee Limitation clause to demonstrate the steps.

To prepare an All Obligations Mortgage:

- 1 Select the Mortgage in the Create Dealing screen and click **Prepare...** to open the Prepare Mortgage screen.
- 2 Select Share/Interest/Complex mode (All is the default mode but you can select other modes at this stage if relevant).
- 3 Review the Mortgagor name. Check the Change Due to Pending Dealing box to edit the names (if required).
- 4 Check the Affected box for each affected mortgagor.
 - > Click Display Mortgagor to check the affected mortgagor(s) details.
- 5 Select the Quick Code from the drop down list in the Mortgagee area or enter the Mortgagee Name. If your firm has customised mortgagee quick codes, these display at the top of the list in the Quick Code field.
 - > Complete the Share of Mortgage field (if the mortgage is held in shares).
 - > Click **Add** to insert a new row in the Mortgagee area.

- 6 Enter the Memorandum No.
- 7 Enter the **Priority Amount** for the mortgage (if required).
- 8 Click **Display** to show the Overall Effect of the Mortgage.
- 9 Click **Add Text...** to open the Add Text screen where you can enter any additional clauses, conditions or information to clarify intent.
 - > Click **OK** to save the information.
- 10 Click **Save & Close** to save the Mortgage.

Note: To restore pre-populated names in the Mortgagors' section of this screen click **Restore**

Note: For a simple Fixed Sum Mortgage follow the steps that are highlighted.

Firm Quick Codes

Contact your System Manager if you require new or customised mortgagee quick codes to be set up to suit your firm.

For more information, see page D6 Maintain Firm Quick Codes.

INFO

Continued on the next page... C 2.3



C 2.3 PREPARE A MORTGAGE WITH ADDITIONAL CLAUSES

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

Step 2

Instrument No: 3150522817 Last Modified: Miss Cotton on 25 Feb 2009 09:10:51

Allocated Title: WNA17441, WNA17442

Mortgage of: All

Description of Part to be Mortgaged (if required):

Step 4

Title File	Share Number	Family Name	Alias/Other Corporate Name	Existing Share	Allocated	Preview
WNA17441		Michael John		1/2		
WNA17442		Michael John	Hanson	1/2		

Display Mortgage: Michael John Hanson as to share interest in Titles WNA17441, WNA17442

Step 5

Mortgage Details

Priority Amount: \$200,000

Principal Sum: \$

Discharge Fee: \$

Penalty Fee: \$

Advance Date:

Requirement Date:

Overall Effect of Mortgage: Mortgage of the shares/interest of Michael John Hanson in Titles WNA17441, WNA17442, to Bank of New Zealand

Pre-validate

Click **Pre-validate** before clicking **Save & Close**. This will ensure that all mandatory fields have been completed.

Click **Preview...** to review the instrument you have just prepared.

Fields marked with a red * are mandatory and must be completed.

INFO

Continued on the next page... C 2.3

C 2.3 PREPARE A MORTGAGE WITH ADDITIONAL CLAUSES

FOR LONDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Fixed Sum Mortgage:

- 1 Follow steps 1, 2, 3, 4, 5 and 6 on previous page.
- 2 Select **Fixed Sum** option to enable fields.
- 3 Enter the applicable Mortgage Details.
- 4 Follow steps 8, 9, and 10 on previous page.
- 5 Click **Save & Close** to save the Mortgage.

Note: For a simple Fixed Sum Mortgage follow steps that are highlighted.

The screenshot shows the 'Landonline - Prepare Dealing' window. The 'Mortgage' section is active, and the 'Fixed Sum' radio button is selected. A yellow callout box labeled 'Step 2' points to this button. Below the mortgage details, the 'Mortgage Type' section shows 'Fixed Sum' selected. The 'Mortgage Details' section includes fields for 'Priority Amount \$1', 'Principal Sum \$200,000.00', 'Advance Date 11 May 2009', and 'Term 25 years'. The 'Mortgagee' section lists 'George Hubert' and 'Mark Hubert' as mortgagees.

Title Ref	Given Name(s)	Family Name	Alias/Other Corporate Name	Existing Share	Allocated	Options
LN017441	George	Hubert		1/2		
	Mark	Hubert		1/4		
	Rowland John	Tweede				
	Brian Timothy	Tweede				
	Michael John	Hanson		1/4		

Disciple Mortgage: Rowland John Tweede, Brian Timothy Tweede and Michael John Hanson as to a 1/4 share in Title LN017441

Mortgagee: George Hubert, Mark Hubert

Mortgage Type: Fixed Sum

Priority Amount \$1: _____ Principal Sum \$200,000.00 Advance Date 11 May 2009 Term 25 years

Disposal Effect of Mortgage: Mortgage of the share/interest of Rowland John Tweede, Brian Timothy Tweede and Michael John Hanson in Title LN017441 to George Hubert and Mark Hubert

Instrument not pre-validated.

Buttons: Prepare, De-allocate, Certify & Sign, Add Test, Add Image, Help, Save, Save & Close, Cancel



C 2.4 PREPARE A CAVEAT

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Caveat:

- 1 Select the Caveat in the Create Dealing screen and click **Prepare...** to open the Prepare Caveat screen.

The screenshot shows the 'Prepare Caveat' window in Landonline. The interface includes the following elements and steps:

- Step 1:** The 'Prepare...' button in the top right corner of the window.
- Step 2:** The 'Caveat Type' dropdown menu, currently set to 'Against dealings with land under s137 Land Transfer Act 1952'.
- Step 3:** The 'Caveat of' radio buttons, with 'All' selected.
- Step 4:** The 'Registered Proprietor' table, showing a single entry for 'Smith'.
- Step 5:** The 'Add' button in the 'Caveator' table.
- Step 6:** The 'Estate or Interest Claimed, Grounds and Derivation from Registered Proprietor' text area, containing a sample agreement text.
- Step 7:** The 'Address for Service of Caveator' section, showing the address for 'George & Maria Hallett'.
- Step 8:** The 'Enter Address...' button in the 'Address for Service of Caveator' section.
- Step 12:** The 'Enter Address...' button in the 'Address for Registered Proprietor' section.
- Step 14:** The 'Save' button at the bottom of the window.

- 2 The default Caveat type is Against dealings with land under s137 Land Transfer Act 1952.
- 3 In the Caveat of section:
 - > The default is All (this can be changed if required).
- 4 Review the Registered Proprietor name(s). Check the Change due to Pending Dealing box to edit the names (if required).
- 5 Enter the name of the Caveator.
 - > Click **Add** to insert a new row in the Caveator area.
- 6 Enter details of the Estate or Interest Claimed, Grounds and Derivation from Registered Proprietor details.
- 7 In the Notice text box you can state which dealings will be allowed (exceptions to the Caveat), if required.
- 8 Click **Enter Address...** in the Address for Service of Caveator area to open the Enter/Update Address screen.

You can enter only one type of address on the Enter/Update Address screen:

- > Physical/Postal
- > Other.

INFO

Continued on the next page... C 2.4



C 2.4 PREPARE A CAVEAT

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

Postal PO/Box mode:

CPP_S34 - Enter/Update Address

Address Type: Postal/PO Box Other

Name/Care of: David Hanson, C/- Tarbottom O'Conner & Co

Street/PO Box: PO Box 123

Suburb/Town: Wellington

Country: New Zealand Postcode: 6005

Buttons: Help, OK, Cancel

Other mode:

CPP_S34 - Enter/Update Address

Address Type: Postal/PO Box Other

Name/Care of: David Hanson, C/- Tarbottom O'Conner & Co

Email: davidhanson@conner.co.nz

Fax:

Buttons: Help, OK, Cancel

- 9 On the Enter/Update Address screen use the Address Type radio buttons:
 - > To enter street or postal address details
 - > To enter email or fax details.
- 10 Enter address data for the Address Type selected in Step 9. All fields must be completed.
- 11 Click **OK** to save the address and return to the Prepare Caveat screen. Landonline displays entered data in the Address for Service of Caveator area.
- 12 Click **Enter Address...** in the Address for Registered Proprietor area to open the Enter/Update Address screen.
- 13 Repeat Steps 9, 10 and 11 to enter address for the Registered Proprietor and return to the Prepare Caveat screen.
- 14 On the Prepare Caveat screen click **Save & Close** to save the Caveat.

Follow the same process for entering addresses on the Enter/Update Address screen when preparing a Notice of Claim (refer to Section 2.5).

INFO

C 2.5 PREPARE A NOTICE OF CLAIM

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Notice of Claim:

- 1 Select the Notice of Claim in the **Create Dealing** screen and click **Prepare...** to open the Prepare Notice of Claim screen.
- 2 The default mode for "Notice of Claim of" is Title (this can be changed if required).
- 3 Enter the Claimant Name.
- 4 Review the Spouse, Civil Union or De Facto Partner names. Check the Change due to Pending Dealing box to edit the names (if required).
- 5 Enter the Derivation from Registered Proprietor details.
- 6 In the Relationship Details section:
 - > The default is Marriage (this can be changed if required).
 - > Using the Marriage example, complete the Date of Marriage and Location details as applicable.
- 7 Click **Enter Address...** to open Enter/Update Address screen to enter addresses for the:
 - > Address for Service of Claimant and
 - > Address for Spouse (based on the relationship type).

Note: Follow the same process for entering addresses as for Caveats (refer to Section 2.4)

- 8 Click **Save & Close** to save the Notice of Claim.

The screenshot displays the 'Prepare Dealing' interface for a Notice of Claim. Key elements include:

- Instrument No:** NC 30074951, **Status:** Draft, **Last Modified:** Helen Joy Howard on 30 Dec 2011 21:15:33.
- Allocated Title:** WN10/294.
- Notice of Claim of:** Title (Step 2).
- Claimant Name:** Amy O'Connor (Step 3).
- Relationship Details:**
 - Given Name(s): Graeme Erol (Step 4).
 - Family Name: O'Connor.
 - Relationship: Marriage (Step 6).
 - Date of Marriage: 14 Mar 1995.
 - Location: St John's Presbyterian Church, Wellington.
- Derivation from Registered Proprietor:** Pursuant to the Property (Relationships) Act 1976 claim an interest in the title WN10/294 by virtue of my marriage to Graeme Erol O'Connor. (Step 5).
- Address Entry:** 'Enter Address...' buttons for the claimant and spouse (Step 7).

C 2.6.1 PREPARE A TRANSMISSION: EXECUTOR/ADMINISTRATOR

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Transmission to an Executor/Administrator:

- 1 Select the Transmission in the Create Dealing screen and click **Prepare...** to open the Prepare Transmission screen.
- 2 Based on ownership the Transmission Type will be predetermined (this can be changed if required).
 - > Insert the Date Acquired (eg date of death or date of amalgamation of a company).
- 3 Based on ownership the default Transmission of will be predetermined (this can be changed if required). For this example we use Share/Interest mode.
- 4 Review the Registered Proprietor details. Check the Change due to Pending Dealing box to edit the names (if required).
- 5 Identify the deceased person by checking the appropriate box in the Affected Proprietor column.
- 6 Enter the name and relevant details of the Executor/Administrator in the Applicant area.
 - > Click **Add** to insert a new row in the Applicant area.
- 7 Click **Display Resulting Ownership** to check the Transmission will have the intended effect.
- 8 Click **Save & Close** to save the Transmission.

The screenshot shows the 'CPP 512 - Prepare Transmission' window in Landonline. Key elements include:

- Step 2:** Points to the 'Date Acquired' field, which is set to '03 March 2003'.
- Step 3:** Points to the 'Registered Proprietors' table, which has columns for Title Ref, Given Name(s), Family Name, Alias/Other Corporate Name, Existing Share of Whole Title, and Affected Proprietors.
- Step 5:** Points to the 'Affected Proprietors' column in the table, where a checkbox is checked for the 'Brian Tenbury' entry.

At the bottom of the window, there is an 'Applicant' section with an 'Add' button and a 'Display Resulting Ownership' button. The 'Save & Close' button is also visible at the bottom right.

C 2.6.2 PREPARE A TRANSMISSION: SURVIVORSHIP

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Transmission to a survivor:

- 1 Select the Transmission in the Create Dealing screen and click **Prepare...** to open the Prepare Transmission screen.
- 2 Based on ownership the **Transmission Type** will be predetermined (this can be changed if required).
> Insert the Date Acquired (eg date of death).
- 3 Based on ownership the default Transmission **of** will be predetermined (this can be changed if required).
- 4 Review the Registered Proprietor details.
- 5 Identify the deceased person by checking the appropriate box in the Affected Proprietor column.
- 6 Click on **Display Applicant** to display the names of the surviving person(s) in the Applicant area.
- 7 Click on **Display Resulting Ownership** to check the Transmission will have the intended effect.
- 8 Click **Save & Close** to save the Transmission.





C 2.7 PREPARE A MEMORANDUM OF PRIORITY

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN


5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To prepare a Memorandum of Priority:

- 1 Select the Memorandum of Priority in the Create Dealing screen and click  to open the Prepare Memorandum of Priority screen.
 - > Details of the registered Proprietors/Interest Holder display.
 - > If any affected titles have a status of Cancelled, Pending, Pre-allocated or Not Yet Converted, the Change due to Pending Dealing checkbox defaults to checked and names of proprietors will not display.
 - > Review and amend or add names of missing proprietors, if required.
- 2 Select the mortgage you want to change the ranking of from the Affected Instrument No. drop down list.
 - > Review rankings and change (if required).
- 3 Review the Mortgagee/Encumbrancee name. If there is no name or you need to edit the name:
 - > Click the Mortgagee/Encumbrancee field to display the Mortgagee/Encumbrancee Names screen.

The screenshot shows the 'Landonline - Prepare Dealing' window with the 'CPP_S80 - Prepare Memorandum of Priority' sub-window. The instrument number is MP 50001341.1. The 'Change due to Pending Dealing' checkbox is checked. The 'Registered Proprietors/Interest Holder' table lists Brian Timothy Tweede, Rosalind Joan Tweede, Michael John Hanson, Rosalind Joan Tweede, and Brian Timothy Tweede. The 'Priority Changes' table shows a new ranking of First for instrument 5337536.1 (ANZ National Bank Limited) and a second ranking for instrument 5337536.1 (The HI Finance Company).

You are able to make changes to the implied covenants and conditions for mortgages losing priority by checking the **Exceptions to implied terms** checkbox (if required).

INFO

Continued on the next page... C 2.7



C 2.7 PREPARE A MEMORANDUM OF PRIORITY

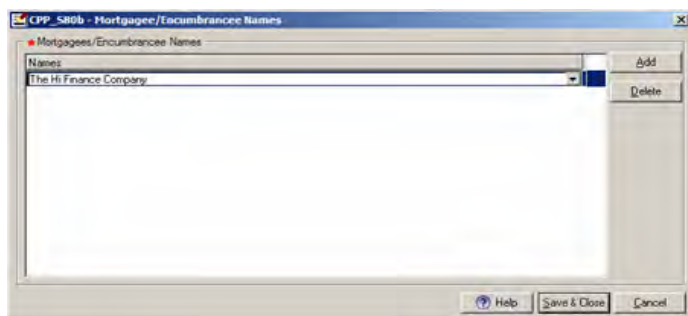
FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

- > Click the drop down arrow in the Names field and select the name. If not in the list, enter the name.
- > Click **Add** to enter another name (if required).
- > Click **Save & Close** to save names and return to the Prepare Memorandum of Priority screen.

- 4 Click the Title Ref field (if required) and review titles affected by the change.
- 5 Click **Add** to insert a row in the Priority Changes area.
- 6 Repeat these steps as necessary to change the priority order of any other Mortgages/Encumbrances.
- 7 Click **Save & Close** to save the Memorandum of Priority.

When a Memorandum of Priority has an affected title with the status of Pending, Pre-allocated or Not Yet Converted:

- > The Memorandum of Priority instrument created over the title will step down to **LODGE**.
- > The **Change due to Pending Dealing** checkbox will default to checked.
- > The **Affected Instrument No** drop down list will not display details of mortgages from head titles. You will need to manually enter the affected instrument number.
- > You will need to enter the **Mortgagee/Encumbrancee** name.

Details of new mortgages in the same dealing that affect these titles will also display for selection.

INFO



C 3 PRE-VALIDATE AND EDIT AN INSTRUMENT OR *e-dealing*

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

Pre-validation runs an automated check to ascertain if the instrument or e-dealing contains correct information. It is recommended you pre-validate before submission.

PRE-VALIDATE AN INSTRUMENT

- 1 In the Prepare Instrument screen or Create Dealing screen, click **Pre-validate**
 - > Landonline displays a message to advise if the instrument or e-dealing has passed or failed.
 - > Click **OK**
 - > If the pre-validation failed, Landonline displays the reasons for the failure.
 - > Click **Print/Save** to print the Pre-validation Report or save it to a location on your computer.
 - > Click **X** to close the Pre-validation Report screen.

Landonline displays a message above **Pre-validate** advising whether the pre-validation passed or failed, along with the date and time.

INFO

EDIT AN INSTRUMENT OR *e-dealing*

If you edit either an instrument or an e-dealing that has been certified and signed, Landonline clears all certifications and signatures for the relevant instrument and sends a notification to all representatives associated with the e-dealing.

To edit an instrument or e-dealing in Workspace:

- 1 Select dealing number or instrument number from the Workspace Tree.
 - > For an instrument, select Instrument | Edit.
 - > For an e-dealing, select Dealing | Edit.
- 2 Edit the instrument or e-dealing.
- 3 Click **Save & Close** to save.

Once you make changes to an instrument or e-dealing, Landonline removes any previous pre-validation. It also clears any certification and signatures for the relevant instrument and returns the status to draft.

INFO



C 4 CREATE A&I (AUTHORITY & INSTRUCTION) FORM

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

To create an A&I form:

- 1 Click **A and I...** on Create Dealing screen.
- 2 Select type of A&I
 - > the Private Individual A&I form displays by default unless there are only corporate names in the instruments.
- 3 Edit Client Details (if required).
- 4 Enter Property Address.
- 5 Edit details in Authority to Register panel.
- 6 Click **Print Preview...** to view and edit the details recorded in the A&I form.
 - > You should enter the Date and nature of base document at this point (this can also be entered after Step 7).
- 7 Click **Save to File...** to save a copy to your computer or **Print...** to print a copy.
- 8 Click **Close** to close the screen.

Note: To ensure that the maximum information is incorporated into the A&I form, you will need to complete preparation of instruments before generating.

Note: Landonline will not save any information in the A&I form. It should be printed or saved to your computer, this can be done at any time.

Click **Help** for more information about editing, previewing, printing and saving A&I forms.

INFO

CERTIFY AN INSTRUMENT

A Conveyancing Professional must be logged on to certify and sign instruments in an e-dealing.

To certify instruments:

- 1 Click **Certify & Sign...** from Workspace, Create Dealing or any Prepare screen.
 - > The Certify and Sign screen will open. Tabs will display across the top of the screen for each instrument you are responsible for in the dealing.
 - > Check the instrument details displayed are correct.
- 2 Read each of the certification statements for each relevant role then check the checkbox.
 - > If there are no certifications, The instrument is ready to sign checkbox displays. Check the checkbox and continue from Step 4.
- 3 Repeat Step 2 for each instrument to be certified.
 - > You may certify one, several or all of the instruments in the dealing.
- 4 When each instrument to be signed has been certified, click **Sign** to sign the instrument(s).

Note: Where there is more than one Conveyancing Professional for a role you will see a **Select Names...** button. You must click this button and then select the party you are signing for prior to checking the certification checkbox. This checkbox will be disabled until you do so.

Special Certifications will have separate checkboxes; these certifications must be checked to sign the instrument.

INFO

Continued on the next page... C5



C 5 CERTIFY AND SIGN AN INSTRUMENT

FOR LANDONLINE VERSION 3.7

4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

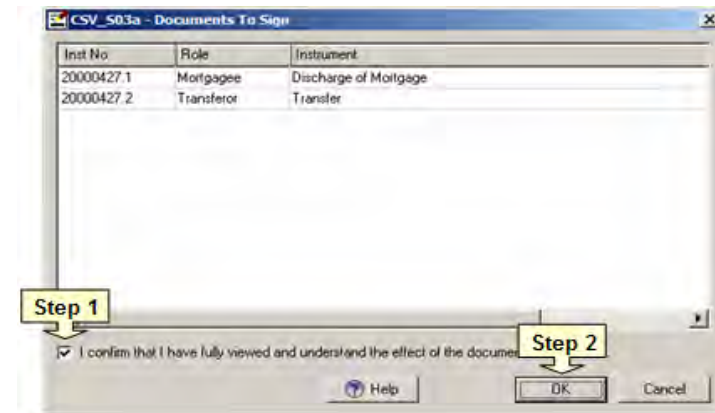
9 SUBMIT *e-dealing*

SIGN INSTRUMENTS

When you click **Sign** the Documents to Sign screen displays.

To **sign** instruments:

- 1 Confirm you have viewed and understand the instruments by checking the checkbox.
- 2 Click **OK**
- 3 A new screen will display requesting you to enter your Landonline Password and click **OK**
- 4 A new screen will display requesting you to enter your Passphrase and click **OK**
- 5 When signing is completed the Signing Status screen appears.
 - > Click **View Details & Close** to open the Documents Signed screen then click **OK** to complete the signing process; or
 - > Click **Close** to exit the Signing Status screen.



4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

9 SUBMIT *e-dealing*

Settlement has been completed when you release an instrument after it has been certified and signed.

RELEASE AN INSTRUMENT FROM THE PREPARE INSTRUMENT SCREEN

- 1 Display the Prepare instrument screen for the instrument (eg Prepare Transfer screen).
- 2 Click **Release**

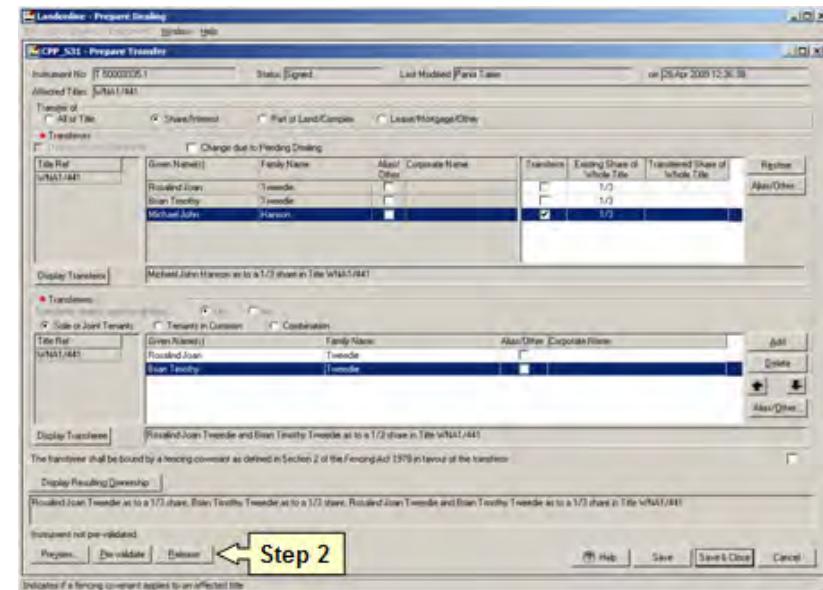
RELEASE AN INSTRUMENT FROM WORKSPACE

- 1 Right mouse click the instrument in the Workspace Tree.
- 2 Select Release from the menu.

For a Transfer or multi-party Mortgage, Landonline sends an online message to all other Primary Contacts involved with the instrument.

Once an instrument is released only the firm submitting the e-dealing can change the status back to signed, instruments you are party to then become editable.

INFO



4 COMPLETE CREATE DEALING SCREEN

5 PREPARE INSTRUMENTS

6 CERTIFY AND SIGN INSTRUMENTS

8 RELEASE INSTRUMENTS

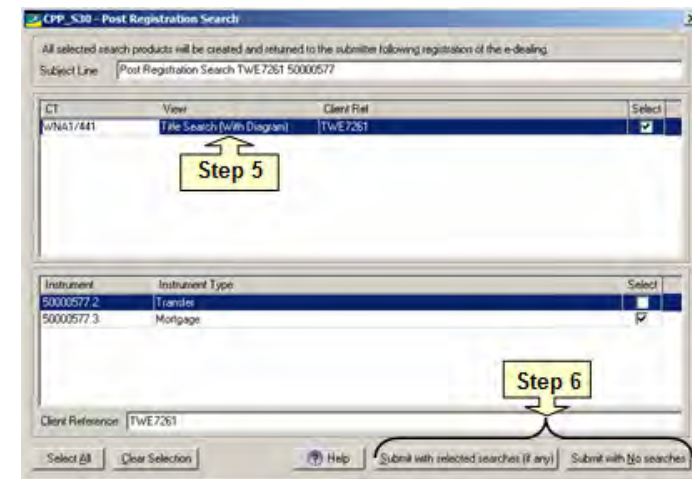
9 SUBMIT *e-dealing*

To submit an e-dealing for registration:

- 1 Make sure the status of each instrument in the e-dealing is Released.
 - > An instrument is usually released from the Workspace screen.
- 2 Either:
 - > Select Dealing | Submit in Workspace; or
 - > Click **Submit** in the Create Dealing screen.
- 3 Review the fees for the e-dealing in the Indicative Fee Charges screen. Add notes to fee items if required.
- 4 Click **OK** to display the Post Registration Search screen.
- 5 Request any search products you require for titles or instruments in the e-dealing.
- 6 Click **Submit with selected searches (if any)** or **Submit with No searches** to submit the e-dealing.

Note: An Auto Reg transaction is removed from Workspace when it has been submitted because registration is instantaneous.

Note: A Lodge transaction will move to the Lodged folder until registration is completed (refer to B1 for information on the Lodged folder).



It is recommended you pre-validate the e-dealing before you submit it.

If a pending dealing affects the titles in the e-dealing, you can choose to queue it. Your e-dealing will be processed when the pending dealing is registered, rejected or withdrawn.

Post Registration Search is not an instant service and may take up to 24 hours. Standard Search fees will apply.


INFO



D 1 CHANGE FIRM DETAILS

FOR LANDONLINE VERSION 3.7

System Managers can change contact details for their own firm.

- 1 Display the Maintain Firm screen:
 - > Click  to display the External System Administration screen.
 - > Select Firm | Maintain Firm... to display the Maintain Firm screen.
- 2 Select the Details tab.
- 3 Change the firm's details as required.

A System Manager should check these details on a regular basis to ensure the Firm Contact Details are correct.

The Firm name is greyed out and cannot be changed.

INFO


Step 2

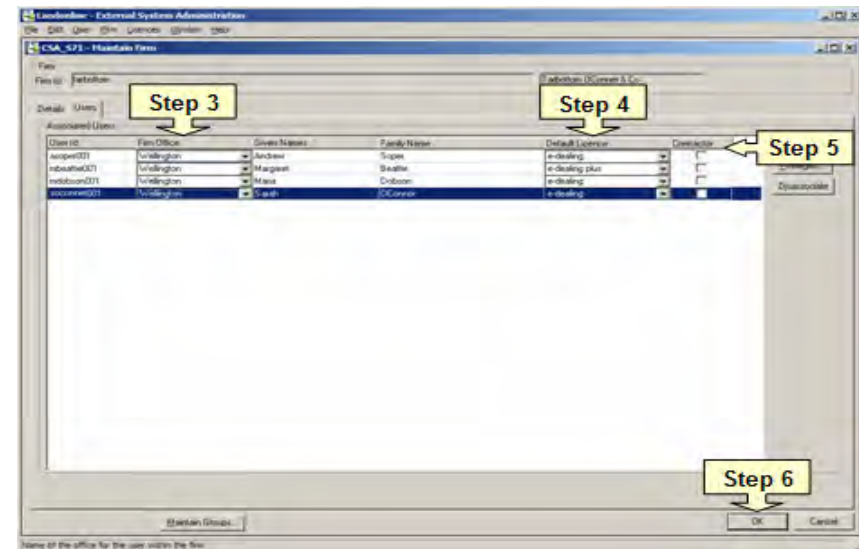


D 2 CHANGE FIRM DETAILS FOR A USER

FOR LANDONLINE VERSION 3.7

System Managers can change the branch office of a firm a user works for, change the default licence assigned to the user, and specify if the user is a contractor.

- 1 Display the Maintain Firm screen:
 - > Click  to display the External System Administration screen.
 - > Select Firm | Maintain Firm... to display the Maintain Firm screen.
- 2 Select the Users tab.
- 3 Select a new branch from the Firm Office drop down list to associate a user with another office in your firm.
- 4 Select a different licence from the Default Licence drop down list to change the default licence for a user.
- 5 Check the Contractor check box to identify a user as a contractor if applicable.
- 6 Click to save and close.

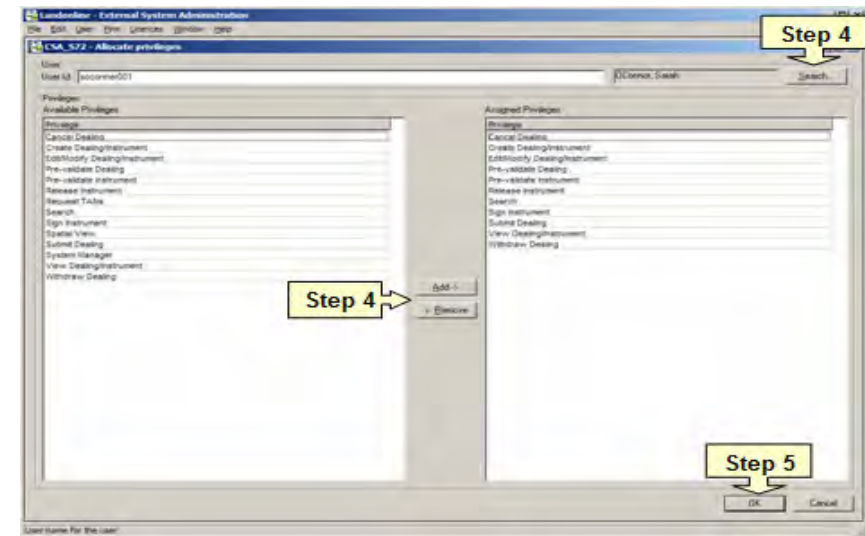


System Managers can allocate or remove user privileges. Privileges allow a user access to specific functions in Landonline.

- 1 Display the Maintain Firm screen.
- 2 Select the Users tab.
- 3 Select the user and click **Privileges...** to display privileges for the user in the Allocate Privileges screen.
- 4 Add or remove privileges for the user:
 - > Select Available Privileges and click **Add->** to allocate them to the user.
 - > Select Assigned Privileges and click **<-Remove** to remove them from the user.
- 5 Click **OK** to save the user's privileges and close the Allocate Privileges screen.

To select multiple privileges for a user, hold Ctrl and click each privilege required.

INFO



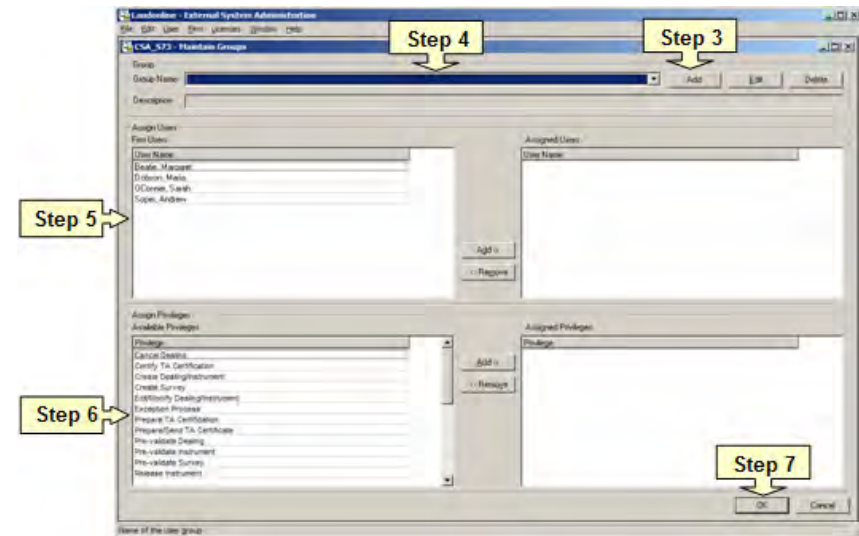


D 4 CREATE PRIVILEGE GROUPS

FOR LANDONLINE VERSION 3.7

System Managers can create Privilege Groups. Groups allow you to manage the assignment of privileges without having to assign privileges to individual users.

- 1 Display the Maintain Firm screen.
- 2 Click **Maintain Groups...** to display the Maintain Groups screen.
- 3 Click **Add** to open the Maintain Group Name screen:
 - > Enter a name and description for the group and click **OK** to save the group and return to the Maintain Group screen.
- 4 Select the group you created in the Group Name field.
- 5 Select Users from the Firm Users list and click **Add->** to assign users to the Group.
- 6 Select privileges from the Available Privileges list and click **Add->** to assign privileges to the group.
- 7 Click **OK** to save and close the Maintain Groups screen.




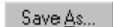


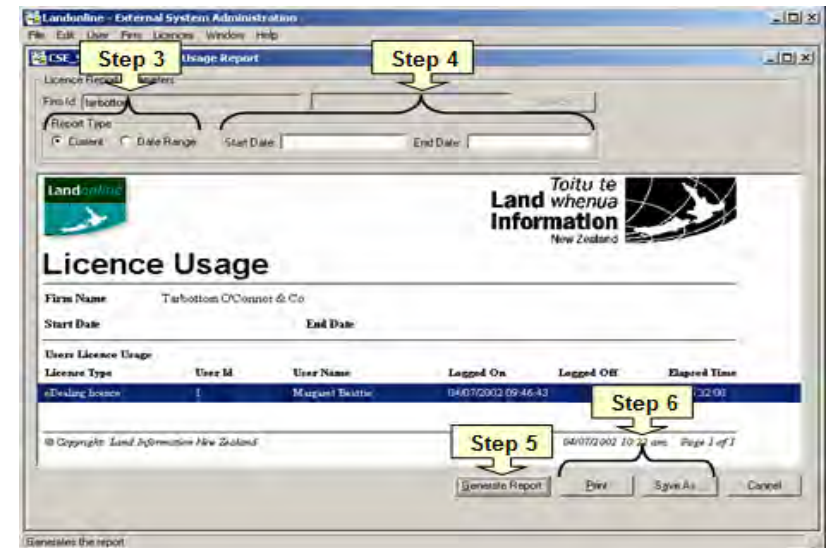


D 5 GENERATE A LICENCE USAGE REPORT

FOR LANDONLINE VERSION 3.7

System Managers can generate a licence usage report to show current or historic use within their own firm.

- 1 Click  to display the External System Administration screen.
- 2 Select Licences | Licence Report.
- 3 Click Current or Date Range.
- 4 Enter the Start Date and End Date if applicable.
- 5 Click .
- 6 Print or save the Licence Usage Report:
 - > Click  to print the report.
 - > Click  to save the report to a location on your computer.










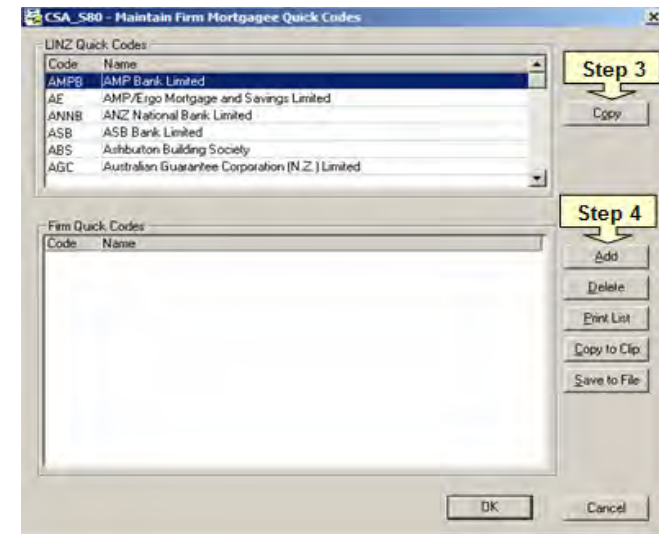
D 6 MAINTAIN FIRM QUICK CODES

FOR LANDONLINE VERSION 3.7

System Managers can customise any mortgagee quick code to suit their firm using the Maintain Firm Mortgagee Quick Codes screen. They can also add a new quick code for a mortgagee that does not display in the LINZ Quick Codes list.

- 1 Click  to display the External System Administration screen.
- 2 Select Firm | Maintain Mortgagee Quick Codes... to display the Maintain Firm Mortgagee Quick Codes screen.
- 3 To copy an existing LINZ quick code and customise it for your firm:
 - > Select the mortgagee quick code in the LINZ Quick Codes area.
 - > Click  to copy the selected mortgagee quick code to the Firm Quick Codes area.
 - > Select the quick code in the Firm Quick Codes area and amend the Code (if required) to customise it for your firm. If you choose not to change any details of a copied mortgagee quick code a warning message displays, but you can continue.
- 4 To create a new mortgagee quick code (if it doesn't display in the LINZ Quick Codes area):
 - > Click  to add a blank row to the Firm Quick Codes area.
 - > Enter the quick code in the Code field and the mortgagee's name in the Name field. The quick code must be unique.

Note: Check your spelling is correct before saving, especially if it is linked to a restricted Memorandum Number.
- 5 To delete a mortgagee quick code from the Firm Quick Codes area, select it and click .
- 6 Click  to save and close.



The Firm Quick Codes list can contain duplicates of the LINZ Quick Codes. The list you create is unique to your firm.

Once you create and save mortgage quick codes for your firm, the next time a user in your firm opens the Prepare Mortgage screen, these codes will display at the top of the list in the Quick Code field.

After you create a list of Firm Quick Codes you can print the list, save it to a file on your computer and copy it to the clipboard to paste elsewhere outside Landonline.