

GMLTRACK USER GUIDE

October 2024 Edition

**Think Differently.
Expect More.**

Welcome to **GMLTrack**: Your Step-by-Step Guide to Effortless Loan Processing

GMLTrack is your go-to platform for managing the loan process with speed and precision. This user guide will walk you through every step, helping you navigate the interface smoothly and maximise its full potential. Whether you're checking the status of a file, uploading documents, or communicating directly with **Green Mortgage Lawyers**, **GMLTrack** has you covered.

Alongside this detailed guide, we've also provided a step-by-step video tutorial, offering a visual walkthrough to help you get the most out of the platform.

With **GMLTrack**, managing your loans has never been easier.

Let's get started!

03

Contents

How to Login / **GMLTrack** Portal / **GMLTrack** Dashboard



04

How to Login

- Don't have an account yet
- New User Set Up



10

Searching a Matter

08

GMLTrack Portal

- Forgot your password?



09

GMLTrack Dashboard

- Homepage

GMLTrack User Guide

How to Login

Don't have an account yet?

If you haven't preregistered your account with us, please contact our IT team for assistance in creating a login account.

Simply email:

support@greenmortgagelawyers.com

and include the following information:

- 1 Client company name:
- 2 New User Information
 - a. First Name:
 - b. Surname:
 - c. Email address:
- 3 Other information:
 - a. Is this new user to have full access to the company profile?
 - b. Is the new user to be set up a Broker?

Once your account is registered, you can set up Multi-Factor Authentication for added security.

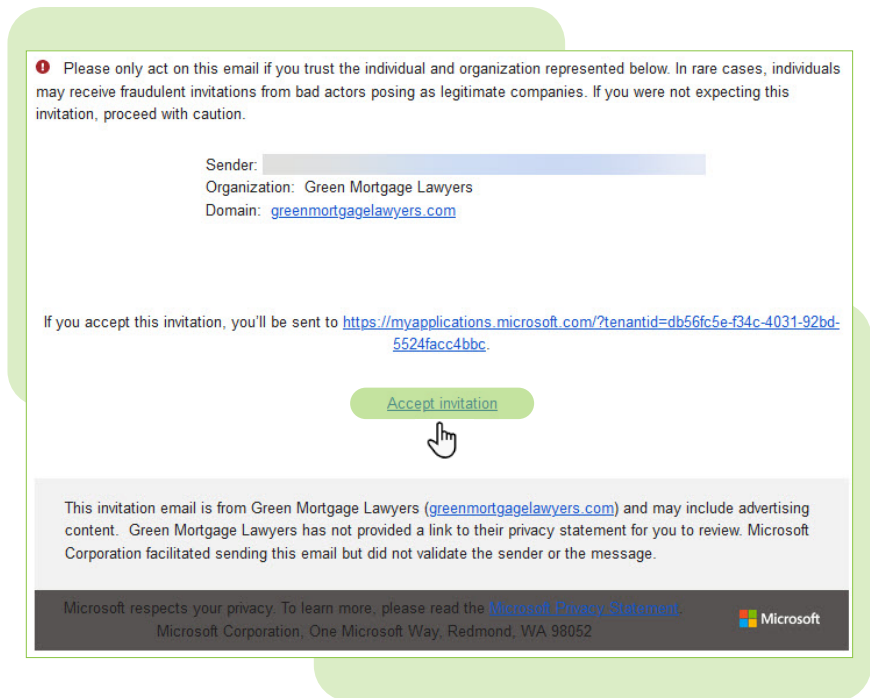
A [step-by-step guide](#) and [video](#) are available in the Brokers and Lenders Resources Centre to assist you.



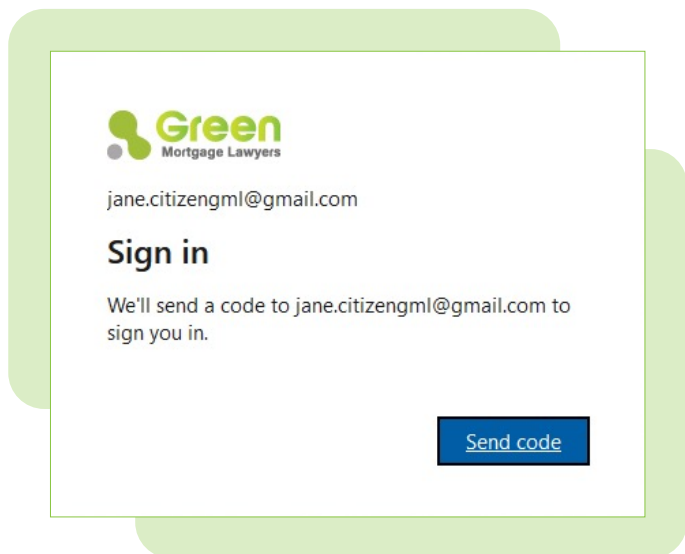
GMLTrack User Guide

New user Setup

You will receive an invitation from Microsoft Invitations on behalf of **Green Mortgage Lawyers** like the below example:

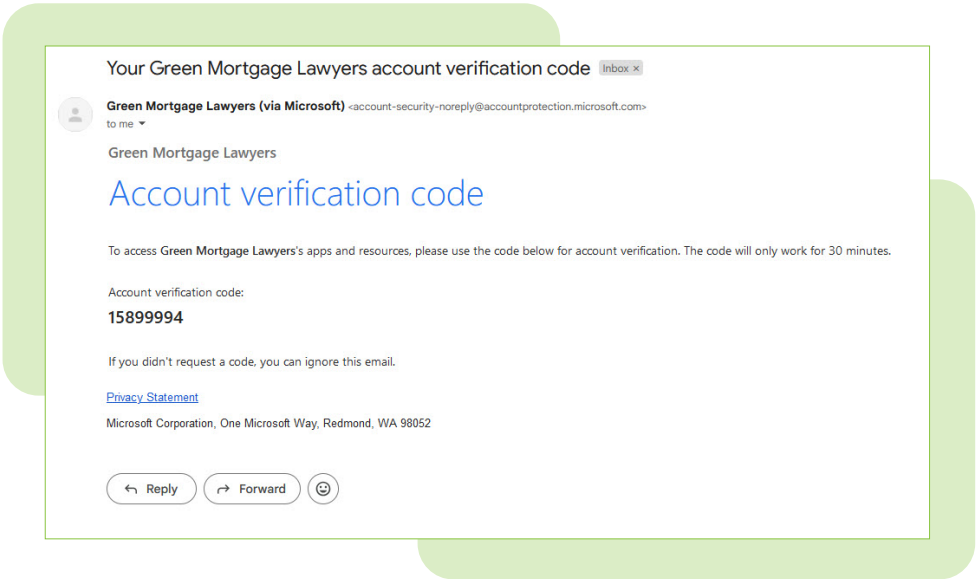


To start the activation process you click on the **“accept invitation”** button and it will take you to the login webpage

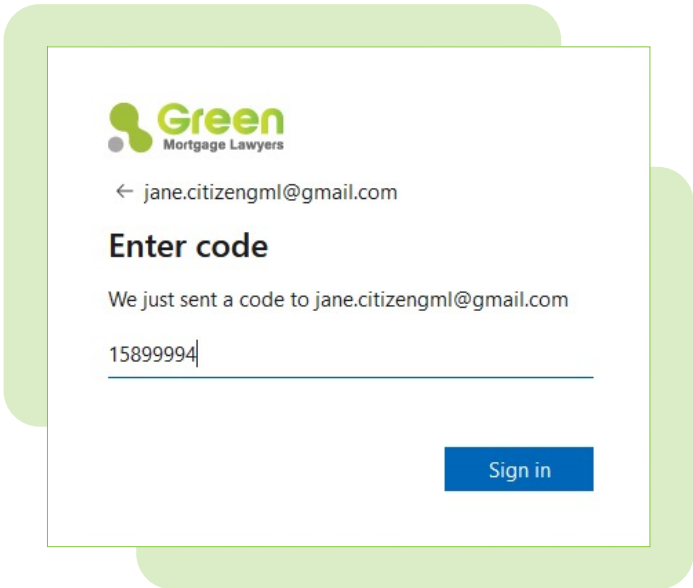


GMLTrack User Guide

To complete the login, it will send a code to the nominated email account

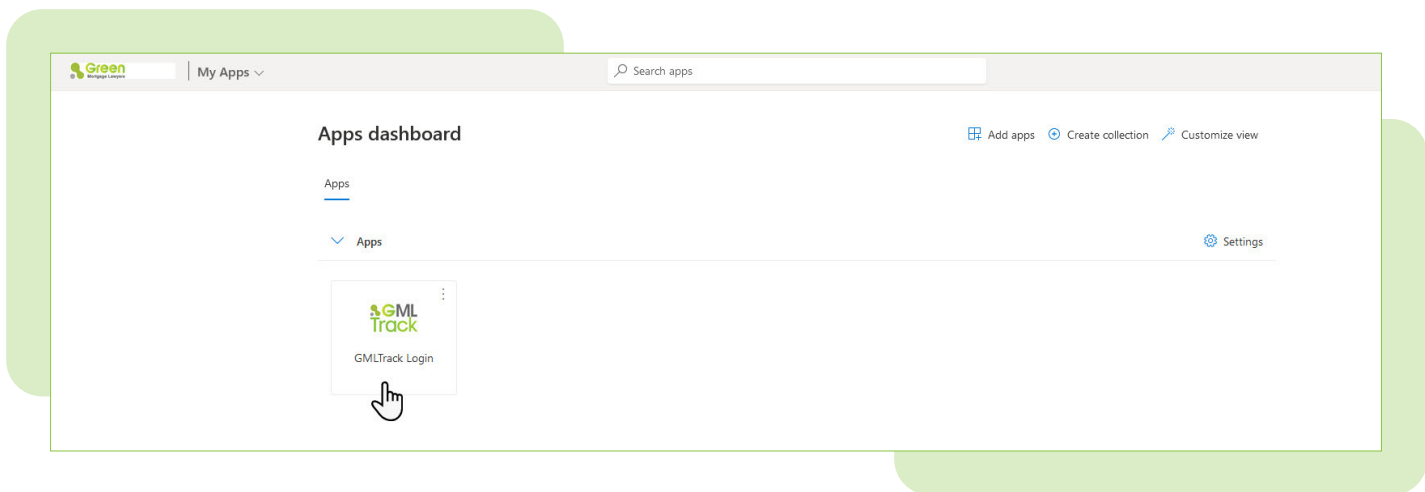


Enter account verification code then sign in.



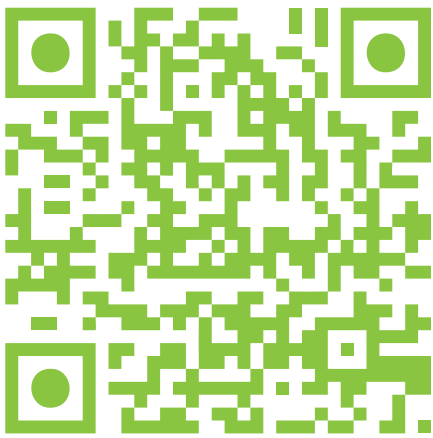
GMLTrack User Guide

Once you have successfully completed the login stage it will take you to your apps dashboard where you will just have to click on the **GMLTrack** Login Application and it will take you to the **GMLTrack** Dashboard.



GMLTrack User Guide

GMLTrack Portal



To login, you will need to access the portal from the below:



Forgot your password?

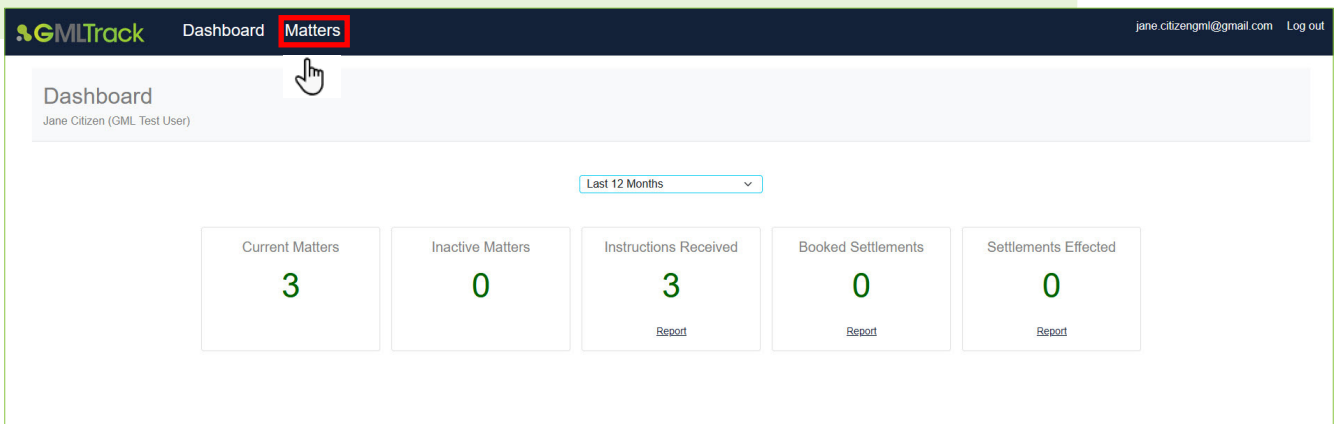
If you forgot your password, you can opt to select the **“forgot my password”** link and that will take to you the Microsoft help page where you can request to reset your password.

GMLTrack User Guide

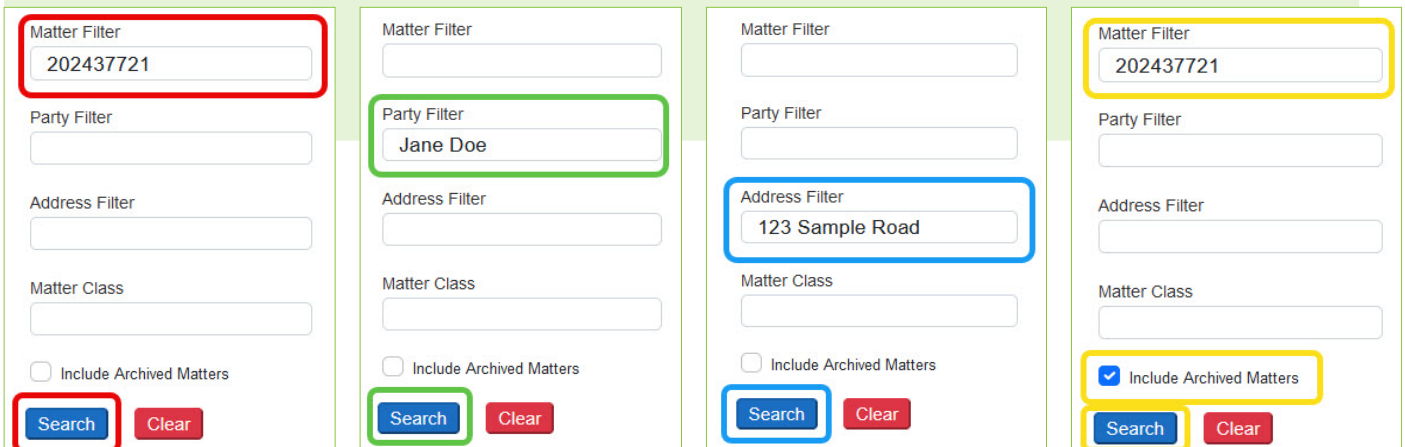
GMLTrack Dashboard

Homepage

Once you are logged in you will have access and see any current files



To search for an application, you select the matters heading at the top and it will display our search functions. You will have the option to search based on the unique client ID, GML reference number, Party Name, or Security address.

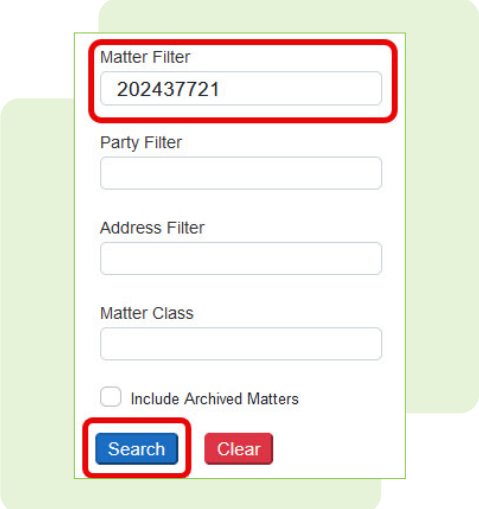


GMLTrack User Guide

Searching a Matter

Searching for a matter current or archived, you now have a more powerful search function. Wider searches allow you to search under, matter details, party details or address details.

1. Matter Details (Red) - Enter the particular details of the matter, loan account reference, or the **Green Mortgage Lawyers** reference number. Enter the number and hit search.



Matter Filter
202437721

Party Filter

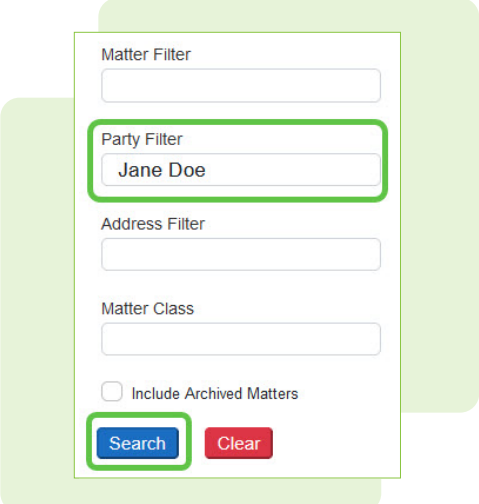
Address Filter

Matter Class

Include Archived Matters

Search Clear

2. Party Details (Green) - Enter the name of the borrower or the guarantor. Enter the details and hit search.



Matter Filter

Party Filter
Jane Doe

Address Filter

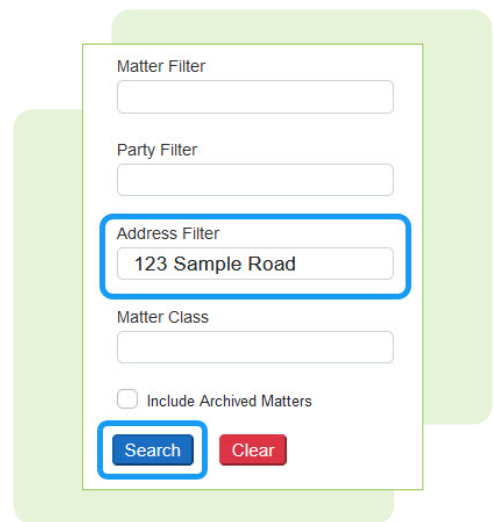
Matter Class

Include Archived Matters

Search Clear

GMLTrack User Guide

3. Property Details (Blue) - Enter the name of one of the security properties. Enter the details and hit search.



Matter Filter
Party Filter
Address Filter
123 Sample Road
Matter Class
 Include Archived Matters
Search Clear

4. Archive Matter (Yellow) - Need to locate a previous matter? Enter one of the fields, click 'include archive matters' and hit search.



Matter Filter
202437721
Party Filter
Address Filter
Matter Class
 Include Archived Matters
Search Clear

GMLTrack User Guide

Once you have found the file you are looking for you select the matter number and it will take you to the full display.

The screenshot shows the GMLTrack 'Matter Search' page. The search results table has one entry with the matter number '202439348' highlighted in red. A mouse cursor is pointing at this number. On the left, there are filter fields for 'Matter Filter', 'Party Filter', 'Address Filter', and 'Matter Class'. A 'Search' button is at the bottom left.

Matter Filter	Matter	Instructed By	Client Ref	Title	Security	Matter Class	Type
202439348	202439348	Green Mortgage Lawyers Pty Ltd	APP-88805	(Test) Sample, R (888802222) Advance of \$1,150,000.00 Refinance - Sydney, NSW		Residential Lending	Refinance

For quick status view of the file, you can see it displayed in the top right hand corner.

The screenshot shows the 'Matter Detail' page for matter number 202439348. The title is '(Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD'. The 'Current Status' box in the top right corner shows 'Instructions Received Complete' with a checkmark icon. Below this are sections for 'Green Mortgage Lawyers' (Matter Title, Matter Ref, Class/Type, Office/State, GML Rep, Urgent, Pexa, Est. Settlement), 'Parties' (Borrower 1, GML Representative, Lender, Mortgage Manager, Office), and 'Securities' (Address, Title Ref).

Address	Title Ref
Security 1 123 Sample Road, BRISBANE CITY QLD 4000	55555555

GMLTrack User Guide

GML Representative

(Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD


Instruction

Instructed By: **Green Mortgage Lawyers Pty Ltd**
 Client Reference: 109876543
 Received: 09/10/2024 13:59

Green Mortgage Lawyers

Matter Title: (Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD
 MatterNr: 202437721
 Class/Type: Residential Lending / Purchase
 Office / State: Brisbane / QLD
GML Rep: Sophie Sheather / sophie.sheather@greenmortgagelawyers.com / +61 7 3223 4794
 Urgent: No
 Pexa: Yes
 Est. Settlement:

Current Status



Instructions Received Complete

Document Upload

Browse... No files selected.

Borrower Display

Parties

Borrower 1	Jane Doe	jane.doe@email.com
GML Representative	Sophie Sheather	sophie.sheather@greenmortgagelawyers.com
Lender	Green Mortgage Lawyers Pty Ltd	
Mortgage Manager	Green Mortgage Lawyers Pty Ltd	
Office	Brisbane	

Securities

	Address	Title Ref
Security 1	123 Sample Road, BRISBANE CITY QLD 4000	55555555

\$ Loan Details

	Account	Ref Nr	Amount	Product	Rate	Term
Loan 1	109876543	Variable Rate Loan Product	\$543,000.00			

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	

Add Comment Save

GMLTrack User Guide

Loan Display

Class/Type: Residential Lending / Purchase
Office / State: Brisbane / QLD
GML Rep: Sophie Sheather / sophie.sheather@greenmortgagelawyers.com / +61 7 3223 4794
Urgent: No
Pexa: Yes
Est. Settlement:

Parties

Borrower 1	Jane Doe	jane.doe@email.com
GML Representative	Sophie Sheather	sophie.sheather@greenmortgagelawyers.com
Lender	Green Mortgage Lawyers Pty Ltd	
Mortgage Manager	Green Mortgage Lawyers Pty Ltd	
Office	Brisbane	

Securities

Address	Title Ref
Security 1 123 Sample Road, BRISBANE CITY QLD 4000	55555555

Loan Details

Account	Ref Nr	Amount	Product	Rate	Term
Loan 1 109876543	Variable Rate Loan Product	\$543,000.00			

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	

Add Comment Save

Security Display

Parties

Borrower 1	Jane Doe	jane.doe@email.com
GML Representative	Sophie Sheather	sophie.sheather@greenmortgagelawyers.com
Lender	Green Mortgage Lawyers Pty Ltd	
Mortgage Manager	Green Mortgage Lawyers Pty Ltd	
Office	Brisbane	

Securities

Address	Title Ref
Security 1 123 Sample Road, BRISBANE CITY QLD 4000	55555555

Loan Details

Account	Ref Nr	Amount	Product	Rate	Term
Loan 1 109876543	Variable Rate Loan Product	\$543,000.00			

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	

Add Comment Save

GMLTrack User Guide

For the full history of the file, you will be able to see that under the **Event History** section in descending order (oldest to newest).

(Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD

Instruction
 Instructed By: Green Mortgage Lawyers Pty Ltd
 Client Reference: 109876543
 Received: 09/10/2024 13:59

Green Mortgage Lawyers
 Matter Title: (Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD
 Matter Nr: 202437721
 Class Type: Residential Lending / Purchase
 Office / State: Brisbane / QLD
 GML Rep: Sophie Sheather / sophie.sheather@greenmortgage.com / +61 7 3223 4794
 Urgent: No
 Pexa: Yes
 Est. Settlement:

Parties
 Borrower 1: Jane Doe (jane.doe@email.com)
 GML Representative: Sophie Sheather (sophie.sheather@greenmortgage.com)
 Lender: Green Mortgage Lawyers Pty Ltd
 Mortgage Manager: Green Mortgage Lawyers Pty Ltd
 Office: Brisbane

Securities
 Address: 123 Sample Road, BRISBANE CITY QLD 4000
 Title Ref: 55555555

Loan Details

Account	Ref Nr	Amount	Product	Rate	Term
Loan 1	109876543	Variable Rate Loan Product	\$543,000.00		

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	

Add Comment Save

Jane Citizen - Comment

28/10/24 10:52 Comment (Jane Citizen (GML Test User)) Certificate of Currency for 123 Sample Road has been uploaded, please proceed to settlement.

Event History - Comment

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	
10/10/24 10:00	Docs Sent To Borrower	Docs Sent to Borrower via DocuSign
28/10/24 10:00	Docs Returned	Documents returned, checked
28/10/24 10:01	Docs Returned Incomplete	Outstandings requirements yet to be provided: - Certificate of Currency
28/10/24 10:52	Comment (Jane Citizen (GML Test User))	Certificate of Currency for 123 Sample Road has been uploaded, please proceed to settlement.
28/10/24 11:44	Comment (System Admin)	PEXA settlement pending 7th November

Add Comment Save

GMLTrack User Guide

You can also add a comment to the file that will be sent to the file owner

(Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD

Instruction
 Instructed By: Green Mortgage Lawyers Pty Ltd
 Client Reference: 109876543
 Received: 09/10/2024 13:59

Green Mortgage Lawyers
 Matter Title: (Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD
 Matter Nr: 202437721
 Class/Type: Residential Lending / Purchase
 Office / State: Brisbane / QLD
 GML Rep: Sophie Sheather / sophie.sheather@greenmortgagelawyers.com / +61 7 3223 4794
 Urgent: No
 Pexa: Yes
 Est. Settlement: Yes

Parties

Borrower 1	Jane Doe	jane.doe@email.com
GML Representative	Sophie Sheather	sophie.sheather@greenmortgagelawyers.com
Lender	Green Mortgage Lawyers Pty Ltd	
Mortgage Manager	Green Mortgage Lawyers Pty Ltd	
Office	Brisbane	

Securities

	Address	Title Ref
Security 1	123 Sample Road, BRISBANE CITY QLD 4000	55555555

Loan Details

	Account	Ref Nr	Amount	Product	Rate	Term
Loan 1	109876543	Variable Rate Loan Product	\$543,000.00			

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
● 09/10/24 13:59	Instructions Received Complete	

Current Status
 Instructions Received Complete

Document Upload
 Browse... No files selected.

Add Comment **Save**

At the very bottom of the page, you have the ability to add comments and it will appear in the event history.

You can add any additional information required for the document you might have just uploaded or you can simply use it as a communication portal to our team.

GMLTrack User Guide

(Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD

Instruction

Instructed By: Green Mortgage Lawyers Pty Ltd
 Client Reference: 109876543
 Received: 09/10/2024 13:59

Green Mortgage Lawyers

Matter Title: (Test) Doe, J (109876543) Advance of \$543,000.00 Purchase - Brisbane, QLD
 MatterNr: 202437721
 Class/Type: Residential Lending / Purchase
 Office / State: Brisbane / QLD
 GML Rep: Sophie Sheather / sophie.sheather@greenmortgagelawyers.com / +61 7 3223 4794
 Urgent: No
 Pexa: Yes
 Est. Settlement:

Parties

Borrower 1	Jane Doe	jane.doe@email.com
GML Representative	Sophie Sheather	sophie.sheather@greenmortgagelawyers.com
Lender	Green Mortgage Lawyers Pty Ltd	
Mortgage Manager	Green Mortgage Lawyers Pty Ltd	
Office	Brisbane	

Securities

Address	Title Ref
Security 1 123 Sample Road, BRISBANE CITY QLD 4000	55555555

Loan Details

Account	Ref Nr	Amount	Product	Rate	Term
Loan 1	109876543	Variable Rate Loan Product	\$543,000.00		

Event History

Date/Time	Event	Comment
09/10/24 13:59	Instructions Received	
09/10/24 13:59	Instructions Received Complete	

Add Comment Save

Documents

Uploaded	By User	Doc Type	Filename	File Size
28/10/24 10:39	Jane Citizen	Adobe PDF Document	Certificate of Currency - 123 Sample Road, Brisbane.pdf	25456

Current Status

✔
Instructions Received Complete

Document Upload

Browse... No files selected.

If you would like to upload a document relating to that file you can do so by utilising our **Document upload option** located underneath the current status of the file on the top right hand side.

Congratulations on Completing the **GMLTrack** User Guide!



You're now ready to make the most of **GMLTrack**'s powerful features. With this guide, you've learned how to navigate the platform, and track your files. Should you need further assistance, remember that our step-by-step video tutorial is available to provide additional support.

If you have any questions or require further help, our team is always here for you. Simply reach out via email at support@greenmortgagelawyers.com, and we'll be happy to assist.

Thank you for choosing **Green Mortgage Lawyers** and **GMLTrack**—streamlining your loan journey every step of the way!

Think Differently.
Expect More.



Level 14, ONE ONE ONE 111 Eagle
Street Brisbane QLD 4000
+61 7 3052 9000
www.greenmortgagelawyers.com