



## How to use ConveyancingBrain Case Tracking

### Use Case Tracking - Best practice that helps us to help you

If used properly, the Case Notes, Case Progress and Messaging functions help us to help you if there is any issue, make it easy to stay up to date with the progress of all your cases, provide you with an audit trail and enable three-way communications between you, the Solicitor and your client – so that each case completes as smoothly and trouble-free as possible.

### Why should you use the Case Notes?

There are many reasons to use the Case Notes:

1. **Provides you with an audit trail - it is your receipt of communication**
2. **Critical for resolving any issue – case notes reflect what has occurred and when**
3. Keeps all your case-specific communications and updates in one place
4. Each Solicitor must respond within 24-48 hours – no more waiting around for call backs
5. You'll receive an automated email when the Solicitor responds or adds a note – you don't need to log in to check if there has been an update
6. Removes the need for you to chase solicitors by phone or email
7. Ability to hide your notes from clients – handy for worrisome clients
8. You can use it for all types of communications:
  - Tried to call...
  - Sent email regarding...
  - Client would like to advise...
  - Chasing update on...



## Where do I find Case Notes?

Once logged in, on the main screen you will see tabs running across the top. Click on the Instructed Cases tab to view your pipeline and then click on the ID to view Summary, illustration, Case Notes, Sale Progress and Client Care letters.

Contact us: 0371 200 0655 12 Messages (Hayley Gateson) Sign Out Account / Settings Reports Help

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Home Residential / BTL Quote Saved Quotes **Instructed Cases** Plugin Solicitors

Case No.:  Postcode:

Status:  Client Name:

Id	Type	Client 1	Client 2	Address	Status
112096	Purchase	Notes	Notes	Case2... CA5 3SE	o

This opens a new screen with all the main information of the chosen case. To view Case Notes, add a note to the Solicitor, etc., simply click on Case Notes in the 'breadcrumbs' navigation:

Contact us: 0371 200 0655 12 Messages (Hayley Gateson) Sign Out Account / Settings Reports Help

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Home Residential / BTL Quote Saved Quotes **Instructed Cases** Plugin Solicitors

Summary | Illustration | Case Notes | Purchase Progress | Client Care Letters

**Summary:**

Case reference: 112096  
 Your ref: CaseNotes  
 Solicitor ref:  
 Instruction date: 23/03/2017  
 Instruction time: 12:10:41  
 Matter type: Purchase  
 Case manager:  
 Referral fee: £0.00  
**Case status:** Unallocated

**Clients:**

Title: Mr Mrs  
 First name: Case1 Case2  
 Last name: Notes Notes  
 Mobile tel: 07717 325 869  
 Email address: case@casenotes.co.uk  
 Home tel:  
 Correspondence address: Case, Notes, , CA1 2SE  
 Purchase Add: Case2, Case, , CA5 3SE  
 Notes with instruction:

**Client(s) Case Tracking:**

Client login URL: http://www.solicitorcasetracking.co.uk/login  
 Username:  
 Password:

**Case Manager:**

Name:  
 Company:  
 Address:

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## View your correspondence with the Solicitor in one place:

Case Notes provides you with an audit trail keeping all your case related communications in one place so that you don't have to rely on email. What is more, the Solicitor must contractually respond within 24-48 hours so you don't have to wait for them to call you back.

Both you and your client receive an automated email and a text message when the Solicitor responds or adds a new Case Note meaning that you don't even need to log in to check if you have received a response, saving you time. Your clients also have their own login to the portal to view the progress of their case.

Here is an example of a communication thread between a broker ('Introducer') and the Solicitor:

**Email Communications:** These notes are shared with the client and introducer, to add a note, complete the form below and click 'Add Note'

Make this note visible to client: Yes  No

Make this note visible to broker: Yes  No

**Kath McLaughlin**  
(Solicitor)  
15/03/2017 @ 12:17:04

Hi Nikki

Just to confirm that Contracts have now been exchanged and completion is to take place on 17th March.

Regards  
Carole

**Nicki Morris**  
(Introducer)  
13/03/2017 @ 10:53:21

Many thanks  
Please let me know when contracts are exchanged as I need to put the client's life cover in force  
thanks  
nicki

**Louise Beacham**  
(Solicitor)  
13/03/2017 @ 10:49:43

Hi Nicki

We are hoping to complete this Friday - 17 March.

Kind regards

**Nicki Morris**  
(Introducer)  
13/03/2017 @ 09:26:03

Hi - please could I have an update on this case, and whether we will be in a position to exchange/complete this week?  
thanks  
nicki

**Louise Beacham**  
(Solicitor)  
09/03/2017 @ 12:53:43

Hi Nicki

We don't just yet. We have mortgage and signed docs from clients.

Justine is reviewing file to make sure all enquiries received etc.

Kind regards

**Nicki Morris**  
(Introducer)  
09/03/2017 @ 12:45:51

Hi please could you confirm if you have estimated exchange/completion dates as yet?  
Many thanks nicki

**Louise Beacham**  
(Solicitor)  
08/03/2017 @ 14:54:38

I will have a look and get back to you.

Kind regards



## How to add a Case Note:

Click on Case Notes to add a note to share with your Solicitor. The Solicitor will automatically receive a notification.

You can choose whether you want to make a note visible to your client. This function is useful when you want to communicate solely with the Solicitor without involving the client, for example when chasing documentation or asking for an update. It's also handy when you have a worrisome client and don't want to overload him/her with information.

The screenshot shows the ConveyancingBrain web application interface. At the top, there is a green navigation bar with the contact number '0371 200 0655', a 'Messages' notification (12), and user options for '(Hayley Gateson) Sign Out', 'Account / Settings', 'Reports', and 'Help'. Below the navigation bar is the 'ConveyancingBrain' logo and a main menu with tabs for 'Home', 'Residential / BTL Quote', 'Saved Quotes', 'Instructed Cases', 'Plugin', and 'Solicitors'. The 'Case Notes' section is active, showing a gear icon and a list of links: 'Summary', 'Illustration', 'Case Notes', 'Purchase Progress', and 'Client Care Letters'. A text box contains the following message: 'Email Communications: These notes are shared between solicitors and introducers. You can select below to make these visible to your client(s). Thank you for using the Case Notes Section. All communications are stored within one place, providing you with an audit trail. Solicitors will be more responsive. This benefits yourself and saves you time.' Below the text box, there are radio buttons for 'Make this note visible to client: Yes' (selected) and 'No', along with an 'Add Note' button.

## Solicitors use Case Notes/Case Progress to communicate updates:

Useful for both you and your client, the Case Progress section provides an overview of the status of a particular case. Depending on the case, the link will be called Purchase/Sale/Remortgage Progress.

Check the case tracking for updates - it is refreshed each time something changes on the case and provides you with a full case audit:

- All updates are date and time stamped
- Cases updated regularly by the solicitors – even to confirm pending documents
- You and your clients can track case progress 24/7

Key stages (please see examples below) can be set by your Solicitors (and may vary), but it is important to give your Solicitors flexibility to set their own key stages especially if they want to integrate with their internal systems, e.g. Content Management System.

Different individuals within the Solicitor firm have their own login details so you and your client are able to see exactly who in the firm updated the case should any questions arise.



ConveyancingBrain

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Residential / BTL Quote
Saved Quotes
Instructed Cases
Plugin
Solicitors

⚙️ [Summary](#) | [Illustration](#) | [Case Notes](#) | [Purchase Progress](#) | [Client Care Letters](#)

- 17/03/2017  
 Kath McLaughlin  
 Updated:  
 17/03/2017 @ 16:16:08

← Case Completed
- 15/03/2017  
 Kath McLaughlin  
 Updated:  
 15/03/2017 @ 12:15:45

← Completion to take place on 17th March 2017
- 15/03/2017  
 Kath McLaughlin  
 Updated:  
 15/03/2017 @ 12:15:21

← Contracts Exchanged
- 14/03/2017  
 Kath McLaughlin  
 Updated:  
 15/03/2017 @ 12:15:16

← Deposit Received
- 09/03/2017  
 Louise Beacham  
 Updated:  
 09/03/2017 @ 12:33:47

← Spoke to client. Advised Mortgage offer and signed documents received and JEM would now be reviewing these
- 09/03/2017  
 Louise Beacham  
 Updated:  
 09/03/2017 @ 12:33:18

← Mortgage Offer Received
- 09/03/2017  
 Louise Beacham  
 Updated:  
 09/03/2017 @ 12:31:50

← Purchase Client Care Letter Returned Signed
- 08/03/2017  
 Jennifer Sutton  
 Updated:  
 08/03/2017 @ 11:45:06

← Searches Returned: Personal Local Searches

ConveyancingBrain

Home
Residential / BTL Quote
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⚙️ [Summary](#) | [Illustration](#) | [Case Notes](#) | [Remortgage Progress](#) | [Client Care Letters](#)

- 22/03/2017  
 Anna Barnard  
 Updated:  
 22/03/2017 @ 09:25:13

← Case Completed
- 19/03/2017  
 Madison Wiltshire  
 Updated:  
 21/03/2017 @ 10:52:08

← Mortgage Advance Requested
- 14/03/2017  
 Anna Barnard  
 Updated:  
 14/03/2017 @ 11:39:27

← chase the lender they advised we will recieve revised mortgage offer
- 10/03/2017  
 Anna Barnard  
 Updated:  
 10/03/2017 @ 12:16:12

← lender will revert to us when happy for us to proceed
- 10/03/2017  
 Anna Barnard  
 Updated:  
 10/03/2017 @ 12:15:55

← call lender to chekc if they are now happy with the occupier. I've been advised that further qury raised with the broker
- 02/03/2017  
 Anna Barnard  
 Updated:  
 02/03/2017 @ 13:49:09

← Signed Documents Received From Client
- 02/03/2017  
 Anna Barnard  
 Updated:  
 02/03/2017 @ 13:49:32

← awiat reply form Lender that they are ok with the occupier
- 23/02/2017  
 Anna Barnard  
 Updated:  
 02/03/2017 @ 13:49:07

← Documents To Client To Sign

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## Messages:

The Messages section gives you an overview of all the updates that have made on ALL your cases. You will see a red notification number at the top when there are updates so that you and your client can see there has been progress without having to go into the case file.

Clicking on the Messages takes you to your inbox where time-stamped messages provide you with a high level view of everything that has been happening with your cases.

The screenshot shows the ConveyancingBrain web application interface. At the top, there is a green navigation bar with the text "Contact us: 0371 200 0655", a "20+ Messages" notification, and user options: "(Suzanne Green) Sign Out", "Account / Settings", "Reports", and "Help". Below this is the main header area with the ConveyancingBrain logo and a navigation menu with tabs: "Home", "Residential / BTL Quote", "Saved Quotes", "Instructed Cases", "Plugin", and "Solicitors". The "Messages" section is active, showing a list of messages with columns for "Date / Time" and "Subject". The messages are as follows:

<input type="checkbox"/>	Date / Time	Subject
<input type="checkbox"/>	13/04/2017 10:24:46	ConveyancingBrain Instruction Details: Test Test
<input type="checkbox"/>	13/04/2017 09:59:46	ConveyancingBrain Instruction Details: Test Test
<input type="checkbox"/>	03/04/2017 15:47:29	Conveyancing referral payment has been made
<input type="checkbox"/>	03/04/2017 15:47:29	Conveyancing referral payment has been made
<input type="checkbox"/>	30/03/2017 14:50:17	ConveyancingBrain Instruction Details: Test Test
<input type="checkbox"/>	24/03/2017 10:11:44	ConveyancingBrain Instruction Details: Test Test

At the top of the message list, there are links for "Mark Read", "Mark Unread", and "Delete". At the top right of the message list, there are links for "Inbox" and "Archive".