



How to use ConveyancingBrain Case Tracking

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

If used properly, the Communication, Case Progress and Messaging functions help us to help you and make it easier 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 your cases complete as smoothly as possible.

Why should you use the Communication functionality?

There are many reasons to use Communication:

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 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 Communication?

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, Communication, Purchase Progress and Client Care Letters.

The screenshot shows the ConveyancingBrain web application interface. At the top, there is a navigation bar with the contact number 0371 200 0655, a Messages icon, and user options for Gareth Harvey (Sign Out, Account / Settings, Reports, Help). Below this is the ConveyancingBrain logo and a navigation menu with tabs: Home, Residential / BTL Quote, Commercial Quote, Saved Quotes, Instructed Cases (highlighted), Plugin, Solicitors, and Library. The main content area features a search form with fields for Case No., Postcode, Status (set to Ongoing cases), and Client Name, with a Submit button. Below the search form is a table of cases:

| Id | Type | Client 1 | Client 2 | Address | Status |
|--------|----------|----------|----------|---------------------------------|-------------|
| 127146 | Purchase | Doeson | | 1 St. James's Road... CR0 2US | Unallocated |
| 127145 | Purchase | Doe | | 111 St. James's Road... CR0 2UW | Unallocated |

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

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Summary | Illustration | **Communication** | Purchase Progress | Client Care Letters

| | | | |
|---------------------|-------------------|-------------------------|---|
| Summary: | | Clients: | |
| Case reference: | 127099 | Title: | Ms |
| Your ref: | MB_Marketing_test | First name: | Jane |
| Solicitor ref: | | Last name: | Doe |
| Instruction date: | 05/11/2018 | Mobile tel: | |
| Instruction time: | 11:01:27 | Email address: | |
| Matter type: | Purchase | Home tel: | |
| Case manager: | | Correspondence address: | 6 The Courtyard, Buntsford Drive, Bromsgrove, B60 3DJ |
| Referral fee: | £100.00 | Purchase Add: | 111 St. James's Road, Croydon, CR0 2UW |
| Case status: | Unallocated | Notes with instruction: | My comments here |
| | | Broker fee: | A broker fee of £100.00 is payable upon completion. A letter signed by the client(s) will need to be sent to the solicitor. |

View your correspondence with the Solicitor in one place:

Communication functionality 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 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.

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

Summary | Illustration | Communication | Purchase Progress | Client Care Letters

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 case notes – once place to store your communications and gain an audit trail.

Make this note visible to client: Yes No [Add Note](#)

Attach a file: [Browse...](#) No file selected. (You can attach up to 4 files; only attach pdf, jpg, gif or png files)

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 note and send files to your Solicitor:

Click on Communication 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.



You can also upload files to Solicitors via Communication as shown below:

You can also access Communication from the Summary page; the option is at the bottom of the page.

Solicitors use Communication/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.

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Summary | Illustration | Communication | 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

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Summary | Illustration | Communication | Purchase Progress | Client Care Letters

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

Case Completed
- 19/03/2017
Madison Wittshire
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 receive 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 check if they are now happy with the occupier. I've been advised that further query 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

await reply from 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.

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Messages Mark Read | Mark Unread | Delete Inbox | Archive

| Date / Time | Subject |
|---------------------|------------------------------------|
| 14/09/2016 10:53:29 | Registration with IFAconveyancing: |

Adding an Administrator:

If you have an assistant who completes case administration on your behalf and they log in using your account to complete tasks (such as communicating with the solicitor), you will personally receive the email notifications of the responses which you may need to forward on to your assistant.

Add an administrator to look after your cases using their own individual log in. An administrator can create quotations, view your saved quotes, place instructions on your behalf, manage your ongoing cases and more.

Any task that your administrator completes against your cases will be recorded under your administrator's name instead of yours. This allows the administrator to directly receive email notifications of responses to the queries they raise, which you will also be able to view under the Communication tab within the case when you log in.

Advisers can allocate one administrator per account whilst administrators can be linked to multiple adviser accounts.

How to add an administrator:

Step 1: Register your administrator on www.conveyancingbrain.co.uk and email admin@conveyancingbrain.co.uk or telephone us on 0371 200 0655 to set the status of the account as an administrator.

Step 2: Your administrator will be provided with their own username and password via email. Ask your administrator to log in.

Step 3: Once logged in, your administrator will find instructions to follow. They will then need to provide you with their unique administrator code:

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Contact us: 0371 200 0655



Messages

(Gareth Harvey) Sign Out

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Office / Bank Account Details

Programme Preferences

Admin Access



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Add A Solicitor

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Admin Access:

You can authorise an administrator to assist you with managing your clients. Through a separate login, they will have access to all of your cases. When they make case updates, their name will appear on the file note so the solicitor and client will know who has made the update.

They will not have access to the Account / Settings tab at the top of the page.

To allow access, your administrator will need to register with us. They then need to give you their access code (found on their home page when logged in) which you can paste in to the box below.

Access Code:

Go