ConveyancingBrain

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.

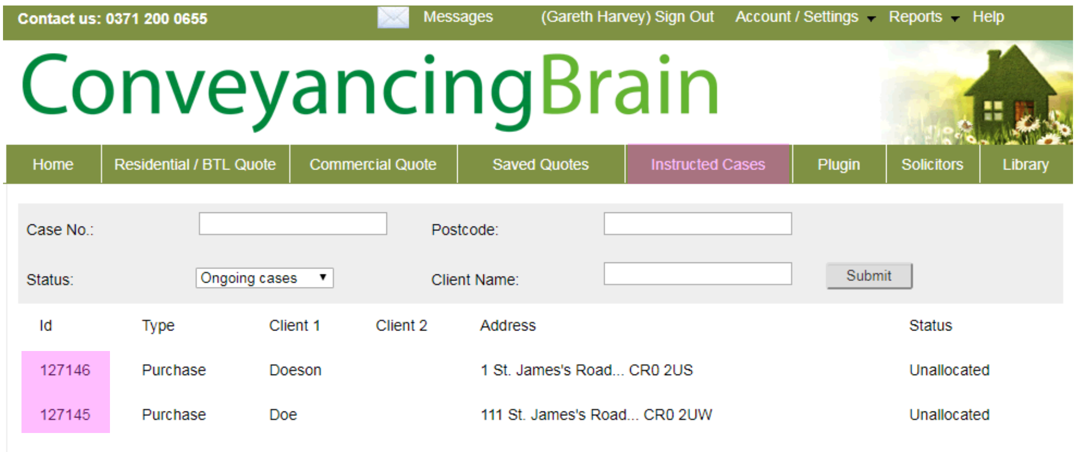
Why should you use the Communication functionality?

There are many reasons to use Communication:

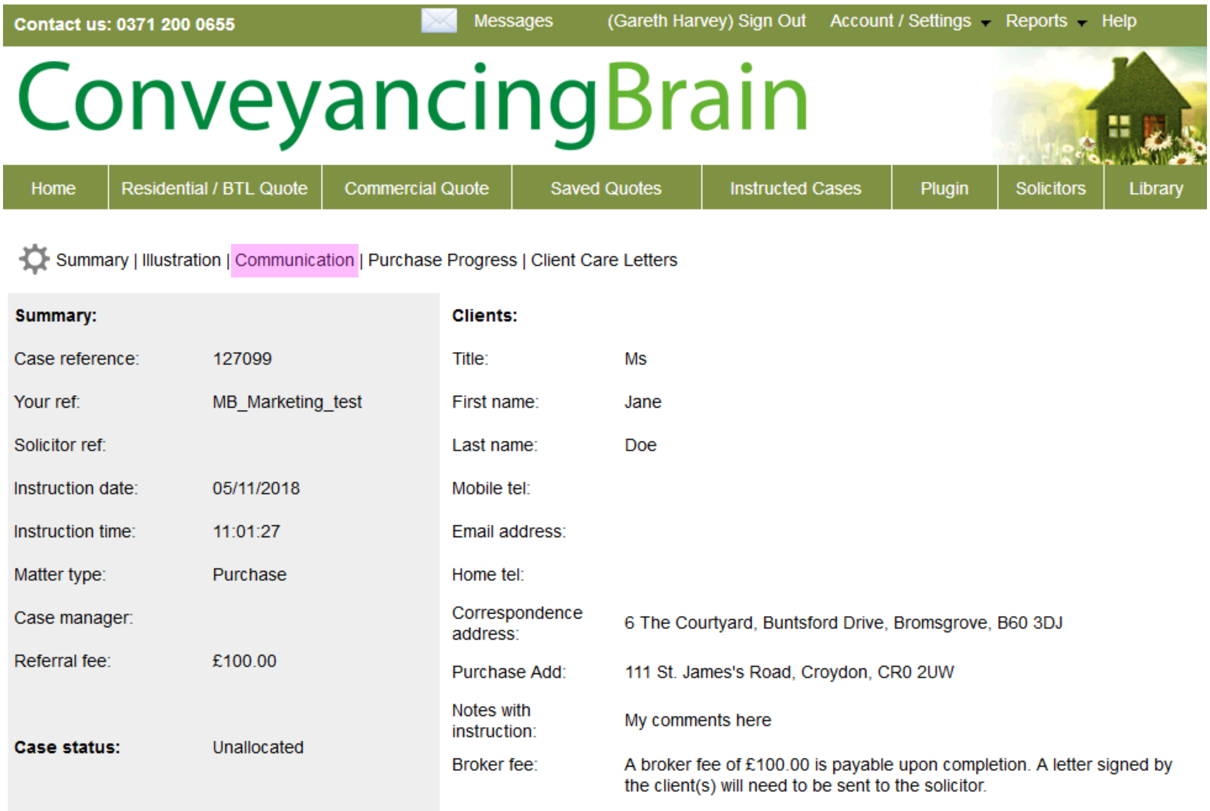
1. **Provides you with an audit trail - it is your receipt of communication**
2. **Critical for resolving any issue – case notes reflect what has occurred and when**
3. Keeps all your case-specific communications and updates in one place
4. Each Solicitor must respond within 24 hours – no more waiting 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.



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.

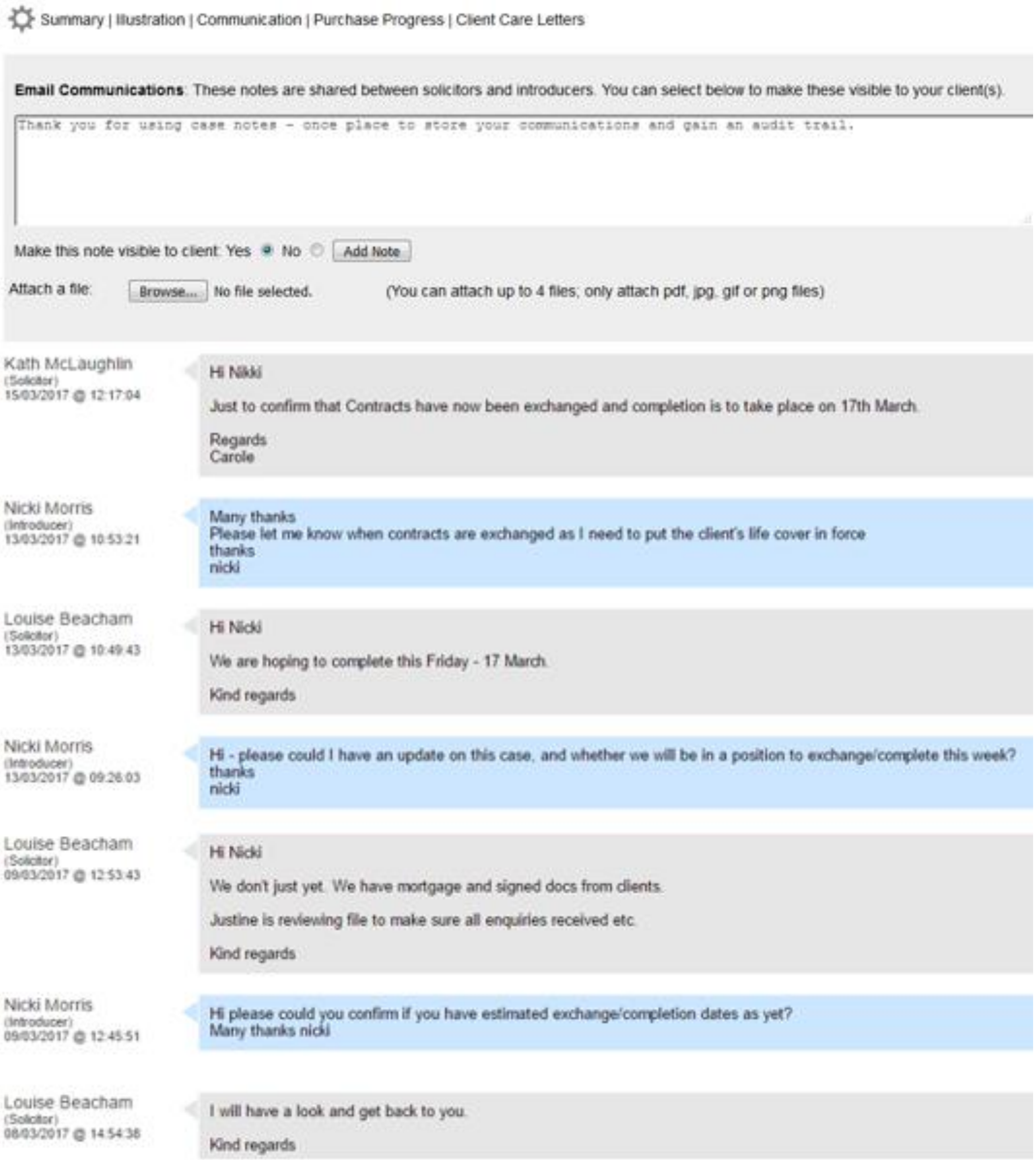


View your correspondence with the Solicitor in one place:

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.

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

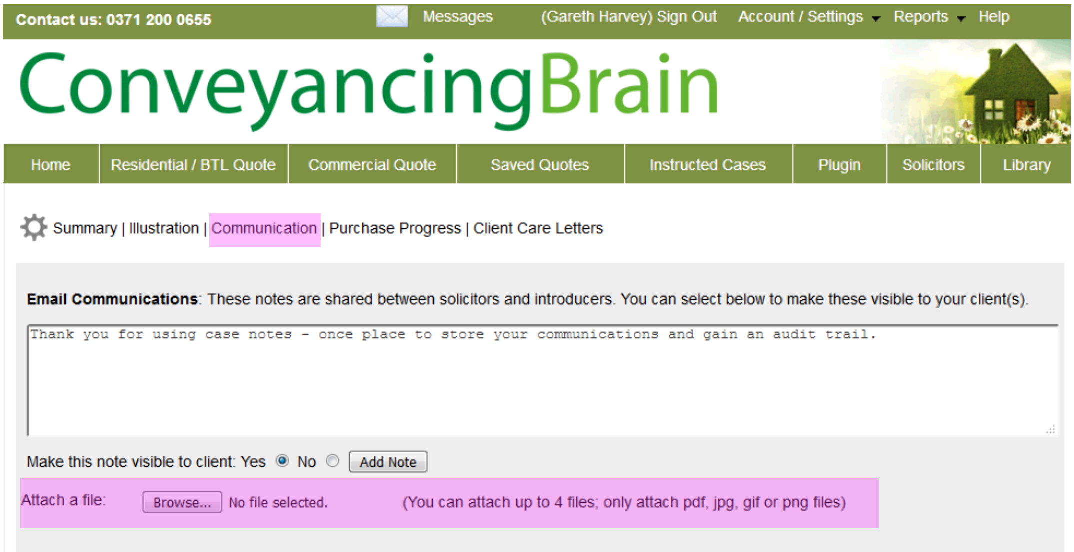


How to add a note and send files to your Solicitor:

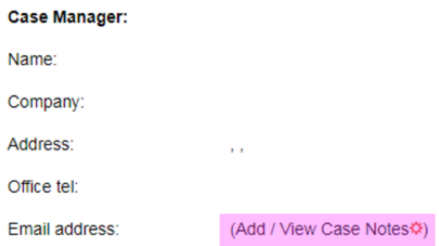
Click on Communication to add a note to share with your Solicitor. The Solicitor will automatically receive a notification.

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:

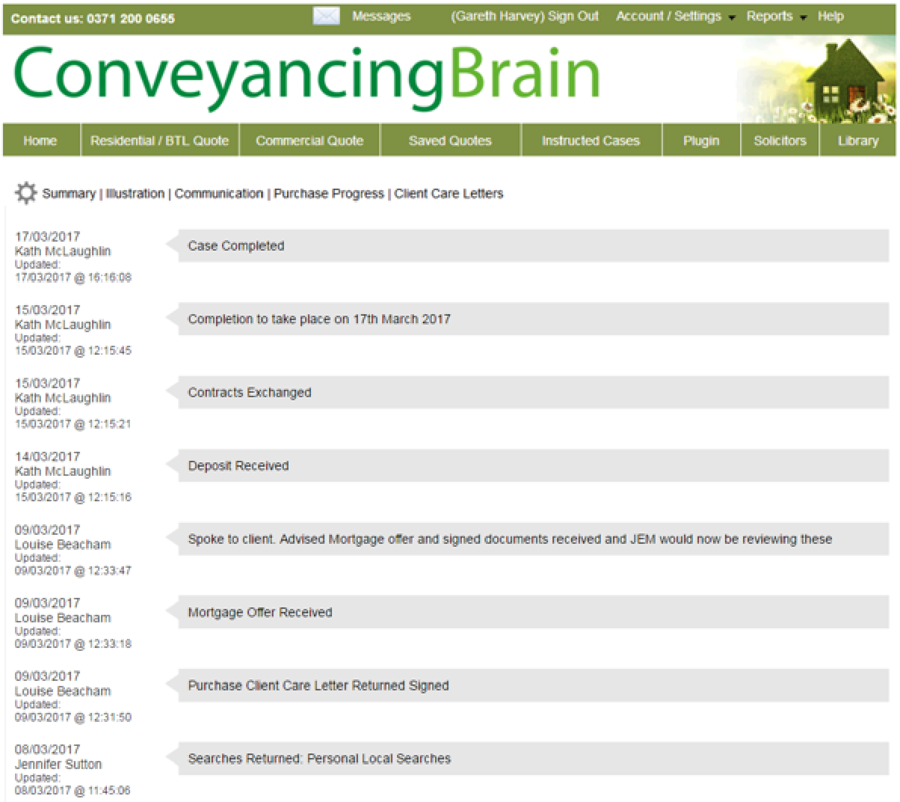
Useful for both you and your client, the Case Progress section provides an overview of the status of a particular case. Depending on the case, the link will be called Purchase/Sale/Remortgage Progress.

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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Home
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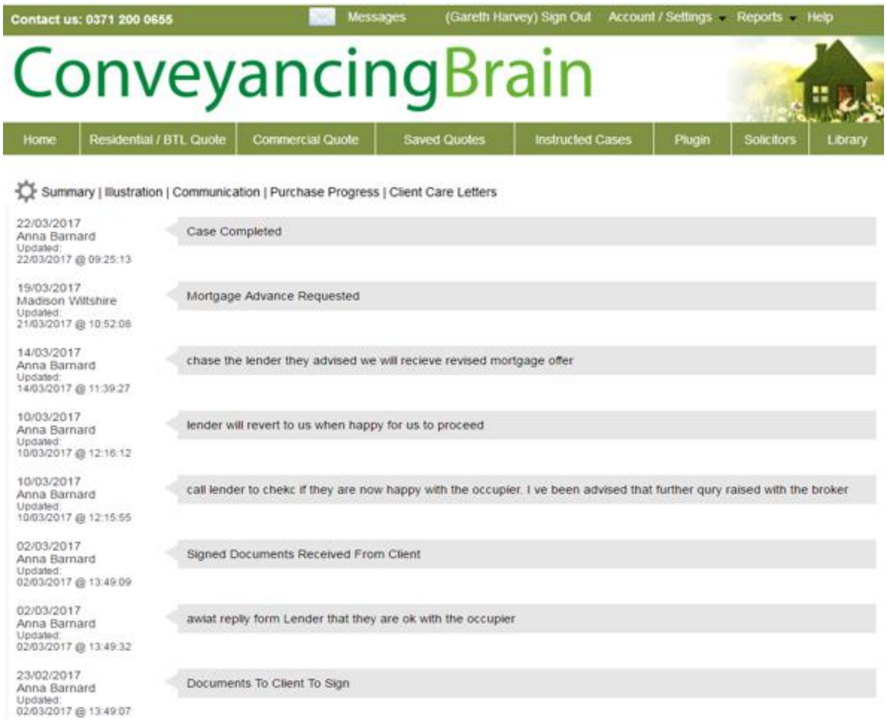
Commercial Quote
Saved Quotes
Instructed Cases
Plugin
Solicitors
Library
Summary | Illustration | Communication | Purchase Progress | Client Care Letters
17/03/2017 Kath McLaughlin Updated: 17/03/2017 @ 16:16:08
Case Completed
15/03/2017 Kath McLaughlin Updated: 15/03/2017 @ 12:15:45
Completion to take 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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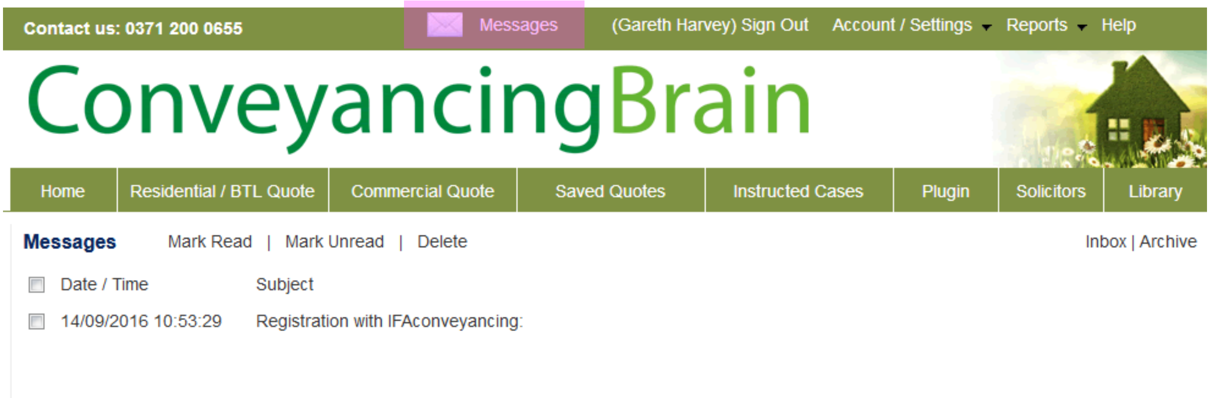
Commercial Quote
Saved Quotes
Instructed Cases
Plugin
Solicitors
Library
Summary | Illustration | Communication | Purchase Progress | Client Care Letters
22/03/2017 Anna Barnard Updated: 22/03/2017 @ 09:25:13
Case Completed
19/03/2017 Madison Wiltshire Updated: 21/03/2017 @ 10:52:08
Mortgage Advance 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

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.



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.

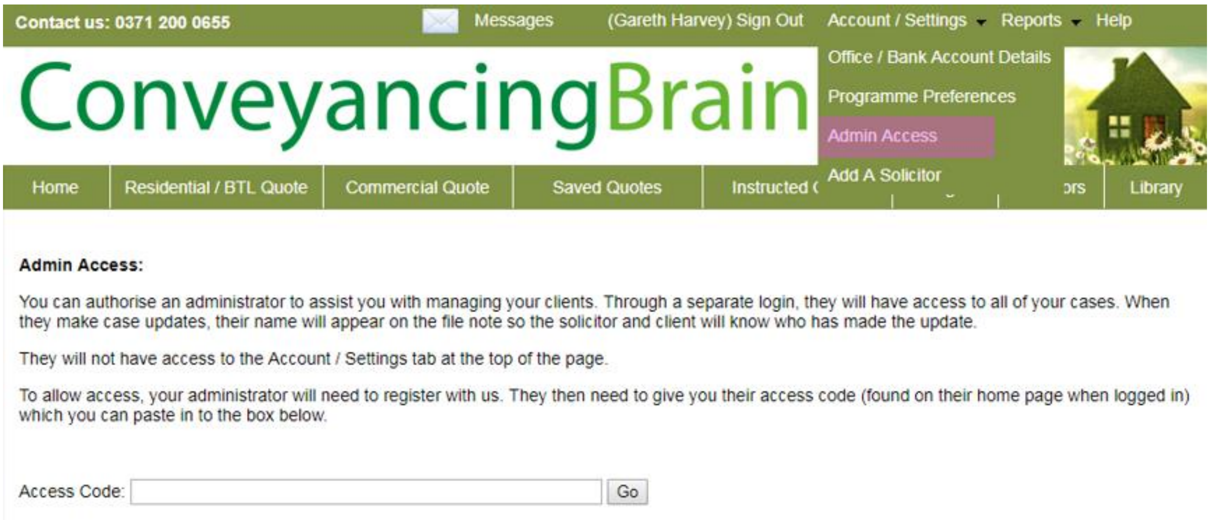
Advisers can allocate one administrator per account whilst administrators can be linked to multiple adviser accounts.

<u>How to add an administrator:</u>

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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Office / Bank Account Details
Programme Preferences
Admin Access
Add A Solicitor
Home
Residential / BTL Quote
Commercial Quote
Saved Quotes
Library
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