



CONVEYANCING ON TOOLBOX

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Introduction

Toolbox now has the functionality to submit conveyance instructions to a panel of Conveyancers.

Through integration with a Conveyancing portal you will be able to complete an instruction form, submit this to your chosen Conveyancer, then track the status of the conveyance in Toolbox as it is automatically updated.

Creating a Conveyance Instruction

- Click onto the Client tab and search for your client.
- Click onto the view button next to your client in the 'Client Results' table.
- Click onto 'Create/View Sales' in the left hand menu and create a sales workflow if one has not already been created.
- If a sales workflow has already been created select the view button next to the workflow in the 'Existing Sales Workflows' table.
- You will see that the extra options in the left hand menu have become available.
- Select 'Create Policies' from the left hand menu.

The screenshot shows the 'Create New Policy' interface. On the left is a navigation menu with 'Create Policies' selected. The main form has a dropdown menu for 'Include Existing Policy' set to 'None Available' and another dropdown menu for 'Add New Conveyance Instruction'. A 'Create' button is visible. Below the form is a table with the following columns: Policy Number, Start Date, Provider Name, Policy Type, Policy Name, Advisor, and Action. The table is currently empty, displaying 'There are no rows to display.'

- In the 'Create New Policy' table choose 'Add New Conveyance Instruction' from the drop down list.
- Click on the create button.

- At the next screen select your chosen Conveyancer and instruction type using the drop down lists. Instruction types available include Sale, Purchase and Remortgage

Policy Number: Provider: Product:
Created By: Policy Holder: Conveyance Tester Sale Status:

Conveyancer Search

Select Conveyancer

Instruction Type

- Click on the search button.
- Toolbox will then display the matching product.

Policy Number: Provider: Product:
Created By: Policy Holder: Conveyance Tester Sale Status:

Conveyancer Search

Select Conveyancer

Instruction Type

Select Product

Name	Provider	Start Date	Expiry Date	Category	
McKeags Conveyance - Sale	McKeags	19/07/2007		Conveyancing	<input type="button" value="Select"/>

- Click on the select button. This will then display the Instruction form.

N.B. The fields on the Instruction form will vary slightly dependent on the instruction type chosen. The example given on the next page is for a sale.

Some of the fields that appear on all instruction forms will already be populated including: Conveyancer, Product, Date entered, Branch, Client and Partner if applicable.

Source Details			
Conveyancer:	McKeags	Product * :	McKeags Conveyance - Sale
Policy Status :	Saved <input type="button" value="v"/>	Policy No (if known) :	
Sales Workflow :	<input type="button" value="View"/> <input type="button" value="Edit"/>	Date Entered :	26/07/2007
Advisor :		Advisor Reference :	ref123
Branch :	Dummy Branch		
Self * :	Conveyance Tester <input type="button" value="Select"/>		
Partner :	<input type="button" value="Select"/>		
Expected Gross Commission Amount :	100	View Client Fees:	Click Here
Sale Details			
Sale Address			
Address 1 :	<input type="text"/>		
Address 2 :	High Street		
City :	Knowle		
County :	West Midlands		
Country :	England <input type="button" value="v"/>		
Postcode :	B93 0LL		
Property Tenure :	Freehold <input type="button" value="v"/>		
If leasehold, number of years remaining :	<input type="text"/>		
Estate Agent Handling the Sale			
Estate Agent :	Estate Agents	Contact Name :	Ted
Address 1 :	<input type="text"/>	Reference :	ref
Address 2 :	High Street	Telephone Number :	0123 456 7890
City :	Knowle	E-mail Address :	<input type="text"/>
County :	West Midlands	Select From Address Book:	
Country :	UK		
Postcode :	B93 0LL		
Existing Mortgage Details			
Selling Price * :	275000	Mortgage To Be Repaid :	Yes <input type="button" value="v"/>
Existing Lender :	Barclays Bank <input type="button" value="v"/>		
Existing Lender Telephone :	0012 345 6789	Account Number :	a/c00001122
Existing Mortgage Loan Amount :	30000	Broker Fee to be added to the Loan :	3000
Second Charge :	<input type="button" value="v"/>		
SC Lender Name :	<input type="button" value="v"/>		
SC Lender Telephone Number :	<input type="text"/>	SC Lender Account Number :	<input type="text"/>
SC Mortgage Loan Amount :	<input type="text"/>	SC Broker Fee to be added to the Loan :	<input type="text"/>

- Complete the instruction form and click on the save button.

- Upon saving this will have created a conveyance policy in Toolbox, with the status 'Saved.'

Policy Status :

- Whilst the conveyance instruction is saved you can return to the instruction form and edit any of the details before submitting to the Conveyancer.

Mortgage Details			
Selling Price * :	275000.00	Mortgage To Be Repaid :	<input type="text" value="Yes"/>
Existing Lender :	<input type="text" value="Barclays Bank"/>		
Existing Lender Telephone :	0012 345 6789	Account Number :	a/c00001122
Existing Mortgage Loan Amount :	30000.00	Broker Fee to be added to the Loan :	3000.00
Second Charge :	<input type="text" value="No"/>		
SC Lender Name :	<input type="text"/>		
SC Lender Telephone Number :		SC Lender Account Number :	
SC Mortgage Loan Amount :	0.00	SC Broker Fee to be added to the Loan :	0.00

- You can cancel the instruction at this point by selecting the 'Cancel Instruction' button. This will set the policy status to 'Aborted'
- N.B. Aborted instructions cancelled prior to submitting can later be re-instated
- However if you are ready to submit the instruction to the Conveyancer choose the 'Submit Instruction' button
- The policy status will change to 'Submitted' and the edit and cancel options will no longer be available.

Policy Status :

- Once submitted the instruction will be sent to a Conveyancing portal where it will get panelled to the chosen Conveyancer. The Conveyancer then has the choice to accept or reject the instruction and the policy status will be updated accordingly.

Conveyance Statuses

- A conveyance will have a status of **'Saved'** until it has been submitted to the Conveyancer.
- Before submitting you can cancel an instruction on Toolbox using the 'Cancel Instruction' button. This will set the policy status to **'Aborted'**

It will be possible to reinstate the instruction if required by using the 'Reinstate' button.

- Once submitted the conveyance will stay with the status **'Submitted'** until this is accepted or rejected by the Conveyancer.
- If the conveyance is rejected the policy status will be changed to **'Rejected.'** You will also be notified via an alert on your homepage.



A screenshot of a web form element. On the left, the text 'Policy Status :' is displayed in blue. To its right is a dropdown menu with a light grey background and a small downward-pointing arrow on the right side. The dropdown menu is open, showing the word 'Rejected' in a dark grey font.

Once rejected you will not be able to take any further action on the instruction. If you wish to submit again to a different Conveyancer you will need to complete a new instruction form.

- If the conveyance is accepted the policy status will change to **'Accepted'** and the policy number, assigned by the Conveyancer, will then display in Toolbox.



A screenshot of a web form element. On the left, the text 'Policy Status :' is displayed in blue. To its right is a dropdown menu with a light grey background and a small downward-pointing arrow on the right side. The dropdown menu is open, showing the word 'Accepted' in a dark grey font. To the right of the dropdown menu is a text input field with a light grey background. The text 'Policy No (if known) :' is displayed in blue above the input field, and the value '02B20039/1' is entered in the field.

- Once an update is received to say the conveyance has completed, the policy status will be changed to **'Completed'**. No further action can be taken.



A screenshot of a web form element. On the left, the text 'Policy Status :' is displayed in blue. To its right is a dropdown menu with a light grey background and a small downward-pointing arrow on the right side. The dropdown menu is open, showing the word 'Completed' in a dark grey font.

- If an instruction is cancelled after submitting to the Conveyancer you will not be able to cancel this through Toolbox. The Conveyancer will need to be notified of the cancellation and in turn the update will be received from them. Once received the policy status will show as **'Cancelled'** and an alert will appear on your homepage.

Searching for a Conveyance

- Searching for a Conveyance will work in the same way as for other policies on Toolbox.
- Click onto the policy tab

My Home Branch Personnel Client Prospect **Policy** Tasks

Search / Add
Policy Sales Tracking Administration
Mortgage Sales Tracking Administration
PMI Sales Tracking Administration
B & C Policy Sales Tracking Administration
Conveyance Sales Tracking Administration

Policy Number: Provider: Product:
Created By: Policy Holder: Sale Status:

Search

Product Category: -- Please Select --
Policy Number:
Client Surname:
Advisor Surname:
Postcode:
First line of Address:
Provider:

- Choose 'Search/Add' from the left hand menu
- Select 'Conveyances' from the Product Category drop down list


Search

Product Category: Conveyances
Policy Number: 02B20039/1
Client Surname:
Advisor Surname:
Postcode:
First line of Address:
Provider:

- Enter your other search criteria
- Click Search.

- This will display the matching conveyances in the 'Policy Results –Conveyance' table.

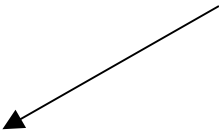
Policy Results - Conveyance						
<u>Date Created</u>	<u>Policy Number</u>	<u>Conveyancer Name</u>	<u>Instruction Type</u>	<u>Status</u>	<u>Advisor</u>	<u>Client</u>
24/07/2007	02820039/1	Totally Conveyancing	Purchase	Completed	Advisor, Mr	Tester, Conveyance

- Click on the view button next to the desired conveyance. 
- The conveyance details will be displayed.

Conveyance Tracking

- Once the Conveyancer has accepted an instruction a sales tracking list will be created.
- To view the sales tracking list for a desired conveyance firstly follow the steps from the previous section, 'Searching for a Conveyance.'
- Next, select 'This Policy Sales Tracking' from the left hand menu.

Search / Add
Conveyancing Policy
Letter Generation
This Policy Sales Tracking
Policy Sales Tracking Administration
Mortgage Sales Tracking Administration
PMI Sales Tracking Administration
Address Book
B & C Policy Sales Tracking Administration
Conveyance Sales Tracking Administration


- This will display the Sales Tracking list. 

N.B. The stage names will vary for the three different instruction types. The example below shows the stages for a sale.

Policy Number: **Policy Holder:** [Conveyance Tester](#) **Created By:** advisor1
Provider: **Product:** McKeags Conveyance **Sale Status:** [Instruction submitted to solicitor](#)
 McKeags - Sale

[View All Notes](#) **Compliance Summary**

Sales Tracking						
	Stage	Attachments	Status	Last Updated Date	Last Updated By	Order
1	Instruction submitted to solicitor		Completed	20/07/2007	Toolbox	
2	Instruction accepted by solicitor		Incomplete			
3	Engagement letter and quotation sent to client		Incomplete			
4	Client agreement returned to solicitor		Incomplete			
5	Title Deeds Requested		Incomplete			
6	Title deeds received and confirmed		Incomplete			
7	Contract sent to purchaser's solicitor		Incomplete			
8	Contract signed		Incomplete			
9	Completion date agreed		Incomplete			
10	Contracts exchanged		Incomplete			
11	Completion		Incomplete			

Next Review Date  For Review By

N.B Conveyance sales tracking varies from other policy sales tracking in Toolbox as the stages are updated automatically as the Conveyancer completes them.

Sales Tracking						
	Stage	Attachments	Status	Last Updated Date	Last Updated By	Order
1	Instruction submitted to solicitor		Completed	20/07/2007	Toolbox	
2	Instruction accepted by solicitor		Completed	20/07/2007	x-it	
3	Engagement letter and quotation sent to client		Completed	20/07/2007	x-it	
4	Client agreement returned to solicitor		Incomplete			

You will not have the option to mark a stage as complete yourself, similarly you will not be able to re-order or add additional stages. You will however be able to add notes and attachments to each stage and assign review details.

Conveyance Tracking Administration

- Conveyance Sales Tracking Administration will be available on the Policy tab.

Sales Tracking Administration

Filter Sales Tracking List

Show Lists With Branch User Of: All

Show Lists With Provider Of: All

Show Lists With Create Dates From: [Calendar] To: [Calendar]

Show Lists With Next Review Date From: [Calendar] To: [Calendar]

Conveyance Status: All

Show Only Overdue Lists:

Show only Conveyances with all stages complete:

Search

Conveyances

Policy Number	Policy Status	Provider	Client	Create Date	Review By Date	View
02B20039/1	Accepted	McKeags	Conveyance, Tester	23/07/2007		View

- Search for your conveyances using the different filters.
- Use the view button in the 'Conveyances' table to display the tracking list.