CONVEYANCING ON TOOLBOX

Contents

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.

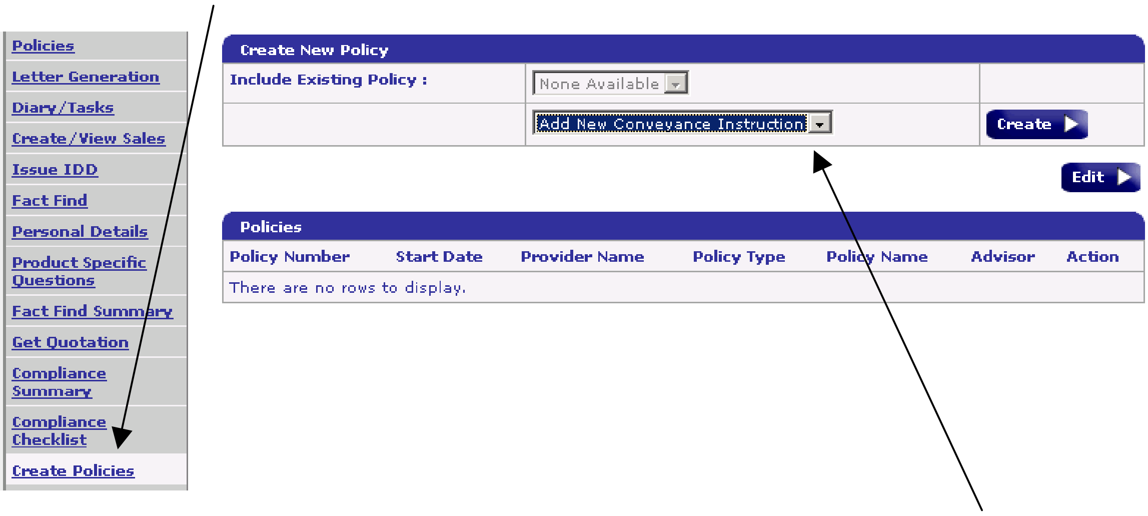
- Click onto the view button next to your client in the 'Client Results' table.

- 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.

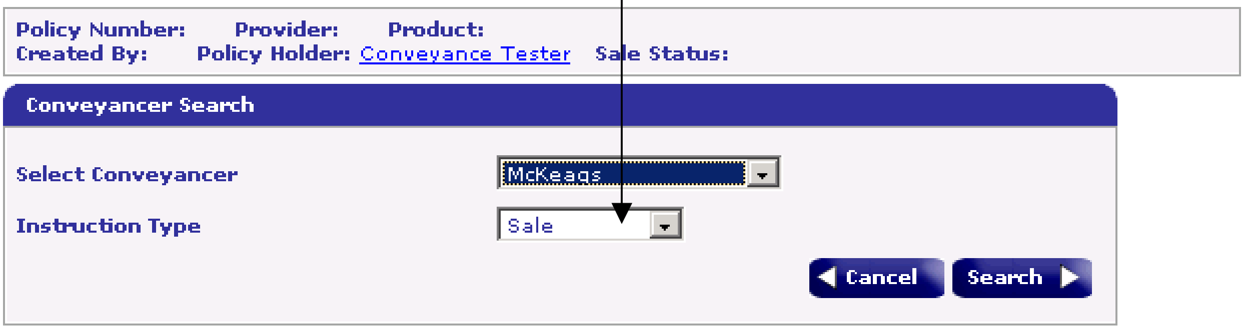
- Select 'Create Policies' from the left hand menu.



- 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



- Click on the search button.

- Toolbox will then display the matching product.

- 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	Policy No (if known) :	
Sales Workflow :	View Edit	Date Entered :	26/07/2007
Advisor :		Advisor Reference :	ref123
Branch :	Dummy Branch		
Self * :	Conveyance Tester Select		
Partner :	Select		
Expected Gross Commission Amount :	100	View Client Fees:	Click Here

Sale Details

Sale Address	
Address1 :	
Address2 :	High Street
City :	Knowle
County :	West Midlands
Country :	England
Postcode :	B93 0LL
Property Tenure :	Freehold
If leasehold, number of years remaining :	

Estate Agent Handling the Sale

Estate Agent :	Estate Agents	Contact Name :	Ted
Address1 :		Reference :	ref
Address2 :	High Street	Telephone Number :	0123 456 7890
City :	Knowle	E-mail Address :	
County :	West Midlands	Select From Address Book:	
Country :	UK		
Postcode :	B93 0LL		

Existing Mortgage Details

Selling Price * :	275000	Mortgage To Be Repaid :	Yes
Existing Lender :		Barclays Bank	
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 :			
SC Lender Name :			
SC Lender Telephone Number :		SC Lender Account Number :	
SC Mortgage Loan Amount :		SC Broker Fee to be added to the Loan :	

Save

- 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 :	Saved

- 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 :**	Yes
Existing Lender :			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 :	No		
SC Lender Name :			
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

Edit ▶ **Cancel Instruction** **Submit Instruction**

- 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 :	Submitted

- 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.

Policy Status :	Rejected

  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.

Policy Status :	Accepted	**Policy No (if known) :**	02B20039/1

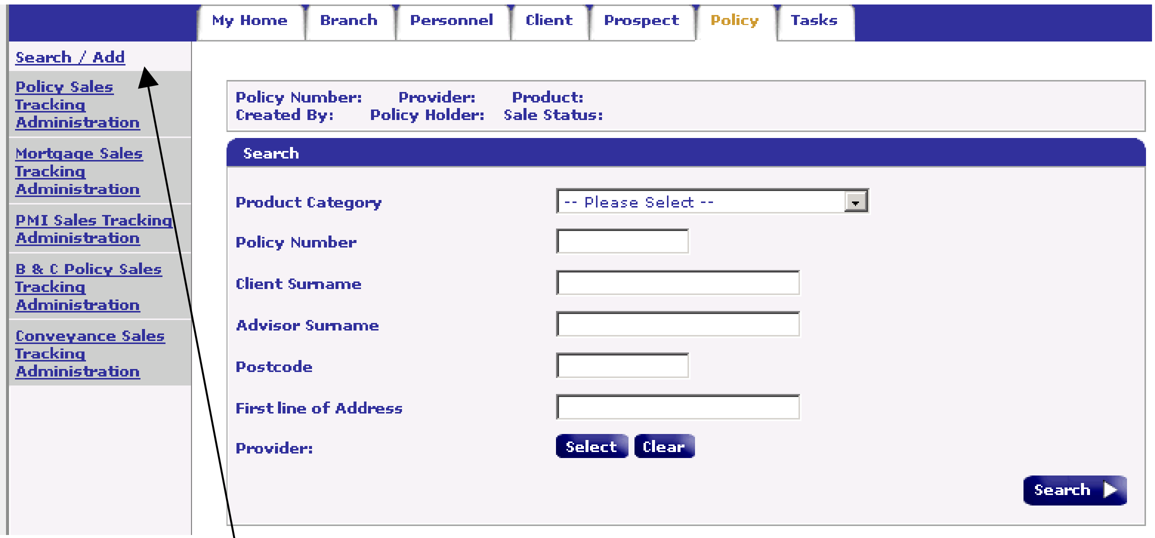
- Once an update is received to say the conveyance has completed, the policy status will be changed to ‘**Completed**’. No further action can be taken.

Policy Status :	Completed

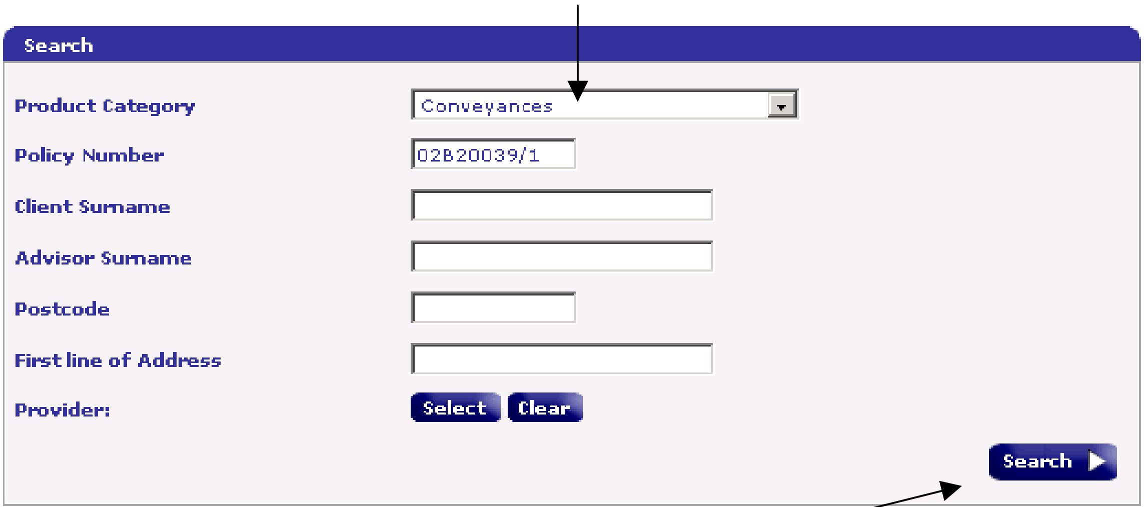
- If an instruction is cancelled after submitting to the Conveyancer you will not be able to cancel this through Toolbox. The Conveyancer will need to be notified of the cancellation and in turn the update will be received from them. Once received the policy status will show as ‘**Cancelled**’ and an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



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



- Enter your other search criteria
- Click Search.

- This will display the matching conveyances is the ‘Policy Results –Conveyance’ table.

Policy Results - Conveyance

Date Created	Policy Number	Conveyancer Name	Instruction Type	Status	Advisor	Client	
24/07/2007	02B20039/1	Totally Conveyancing	Purchase	Completed	Advisor, Mr	Tester, Conveyance	View

- 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.

- 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: advisora1
Provider: McKeags
Product: McKeags Conveyance - Sale
Sale Status: Instruction submitted to solicitor

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** | **Add New Task**

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

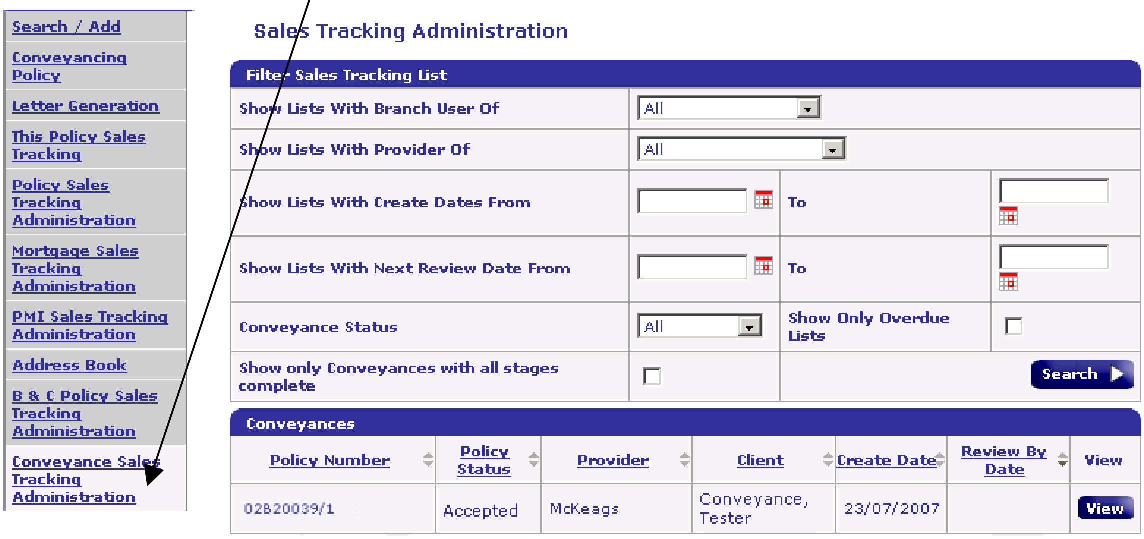
Sales Tracking

		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.



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