



Take Control of Conveyancing
with **Convey Control**

Telephone: 0845 6526 855 www.conveypro.co.uk

How **Convey Control** delivers up to 40% time saving

Convey Control features:

- **Standard Letters & Forms** - a full range, including HMLR approved forms, standard letters, completion statements and cheque request slips. All documents can be fully edited to meet your exact requirements
- **Complete Workflows** - for sale, purchase and remortgage transactions. Provides at a glance summary of progress and colour-coded steps for ease of reference. Tailored workflows are available as an optional extra
- **To-do Reminders** - the system can automatically remind you when something needs to be done or priority periods are about to expire
- **Document Management** - saves documents and attaches them electronically to a particular client file. They can be retrieved by a click of the mouse when needed
- **File Notes** - easy to create with built-in alarms, which advise users of any issues that need to be considered before proceeding
- **Automatic calculation** - of completion statements, Land Registry charges, VAT and stamp duty fees
- **Central Database** - for storing contact details of solicitors, local authorities, estate agents, Land Registry offices, water authorities, life insurance offices, lenders, banks, freeholders and referral sources
- **Email Integration** - email documents straight from workflows via integration with Microsoft™ Outlook
- **Audit Trail** - tracking for security, training and practice management.
- **View Only Option** - typically used by supervisory personnel.

continued...

How **Convey Control** delivers up to 40% time saving

- **Tracking Profitability** - matter-by-matter, user-by-user, with customisable built in profit margin indicators.
- **Risk Management** - assists compliance with the new standard of Lexcel and helps keep professional indemnity premiums down.
- **Web Tracking** - an option which keeps all parties informed by reporting key stages and providing access to the matter progress by automatically updating a secure web site, sending emails or SMS text messages to the client.
- **Win New Fees** - targeted marketing via Convey Control's databases to easily promote the firms legal services.
- **Up-to-the-minute reporting and tracking** - reactive and proactive reports for single or multiple matters.
- **Time Recording** - facilitates automatic time costing.
- **Search function** - instantly find the matter you are looking for, even with the minimum of information.
- **Data Entry Only Option** - typically used by office juniors and reception staff for entering initial matter information, thus saving fee-earner time on file opening.
- **SDLT form integration** - automatically completes your SDLT 1, 2, 3, 4 forms and returns an SDLT 5 certificate instantly to your desktop.

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Looking forward

Designed with the future in mind

e-conveyancing

The Government and is committed to speeding up the conveyancing process through the use of electronic conveyancing. Case management systems are a prerequisite of e-conveyancing.

Integration with other systems will speed up the transfer of property information dramatically, if only by cutting postal time and reducing data errors.

Performing a search	
Manual process – takes weeks	Convey Control – takes days
<ul style="list-style-type: none">• Buy a printed form• Fill in the form by hand• Post to search provider• Process search• Post back to you	<ul style="list-style-type: none">• Request the form• The form is pre-populated• Send to search provider electronically• Process search• Return electronically

Integration with other systems is a key feature of Convey Control

Looking forward

Designed with the future in mind

Forms Updates

Updates to standard forms (HMLR etc) can be obtained from the "client area" of the Convey Control website and we provide regular email bulletins on relevant changes in e-conveyancing.

HM Revenue & Customs

Convey Control was the first software house (through it's sister product SDLT.co.uk) to be accredited to submit electronic SDLT forms, and to print the SDLT 5. SDLT.co.uk is the largest independent submitter of SDLT forms – a healthy track record of keeping up with the future we feel.

Lexcel Standard

Lexcel is the legal industry quality standard. It can also play a role in indemnity insurance negotiations. Convey Control can assist its clients to become Lexcel compliant.

Online Progress Report

Convey Control allows for matter progress to be published to a password protected web portal. Each client and/or estate agent, referral source or other relevant party can be assigned their own unique login, giving them access to their particular matters. All for the price of £6 + VAT per uploaded matter. As with the SDLT.co.uk submission fee we suggest you pass this onto the client as a disbursement.

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Convey Control is easily integrated with your existing systems and procedures

Convey Control:

- Is a software program which runs on any Microsoft Windows™ based platform and integrates with all Microsoft Office™ versions including Word™
- Requires no specialised equipment
- Integrates with your internal procedures and corporate image

Convey Control will provide seamless integration and continuous support including:

- Installation
- Training
- Technical support
- Software and forms updates

Convey Control integrates with NLIS channel members and private search organisations following the PISCES standards concept

System Requirements:

- Minimum of Pentium™ II, 64Mb RAM
- 50Mb free hard disk space
- Microsoft Windows™ and Microsoft Office™
- Laser printer (desirable but not essential)
- Network (peer to peer or client server) for multi-user version
- Can be run on a single computer

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A typical **Convey Control** process from quote to completion



New Quote Given:	Instructions Received	Client Case Progressed
Data fields are presented easy-to-use conveyancing sections and classified by sale, purchase and remortgage	Quote converted. Details of all costs, disbursements and scaleable charges are stored so that calculation can be done automatically. Each matter has a file note facility.	Steps are coloured according to their matter process on three step types: i) document out or 'To-Do', ii) document out with reply required, iii) document received or reminder all correspondence is merged with matter data onto the firms pre-drafted letterhead
View Practice, matter or progress reports		

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Conveyancer

Your questions answered:

- **Is Convey Control difficult to use and will it work with our existing system?**
Seamless integration and continuous support are hallmarks of Convey Control, which uses popular Microsoft Windows™ based software and integrates with your internal processes and corporate image.
- **How does Convey Control ensure that I always know where I am in the matter?**
Convey Control uses reactive and proactive reports that keep you on track. Colour coded Conveyancing steps provide at-a-glance reminders.
- **Does our practice need more than one copy?**
For maximum benefit, every fee-earner and secretary should have one licensed copy per computer.
- **Do you need to be able to type to use Convey Control?**
Fee-earners do not need to be computer literate, or to know how to type. Letters are pre-drafted and stored within Convey Control.
- **Does Convey Control make secretaries redundant?**
Quite the reverse. It empowers them and enhances their ability to provide excellent client service. Convey Control can even enable secretaries to become fee-earners.

Convey Control provides easy access to pre-populated and auto-calculated information. Accuracy is increased and mundane, repetitive tasks are hugely reduced.

Practice Manager

Your questions answered:

- **How does Convey Control specifically benefit Practice Managers?**
It enables you to follow what is happening and makes all conveyancing matters transparent. Convey Control helps you manage the team better. You can monitor, either by date or fee earner, the varying workloads to enable you to prioritise, re-allocate and manage staff sickness, holidays, absenteeism, etc.
- **How does Convey Control help me contribute to profitability?**
One way is by using the client database for promotion. Convey Control's marketing function enables you to create profiles and market to chosen clients. For example, you can easily create a personalised letter to clients with properties valued above the inheritance tax threshold. You can then advise them they may have an issue and invite them to contact your tax planning experts.
- **How does Convey Control help me have a more productive relationship with our Independent Financial Advisor?**
Financial advisors are able to generate increased fees for solicitors, but they need specific information from you to do so. Convey Control provides you with a list of clients of the correct profile in a ready-made mailing database.

Even though not involved specifically in the conveyancing process, Practice Managers benefit from the Convey Control tracking and information functions. Convey Control also facilitates better management of staff and effective promotion to chosen clients.

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Senior or Supervisory Partner

Your questions answered:

- **How does Convey Control help me increase our firm's profitability?**
Convey Control allows you to set a series of profit parameters and then flags the conveyancer when they near each parameter, and continues to do so until additional fees are instructed, or you choose to make a loss on the matter. In this way you can ensure that fees match time input.

Convey Control enables you to monitor progress and performance as well as control and delegate workloads, so that they are progressed by the most appropriate member of staff for speed and profitability.

The Convey Control website provides you with a competitive advantage, for both new and potential clients. Customised summaries of progress in each matter can be effectively used to demonstrate the firms' commitment to client care.

- **What can I do to reduce the risk management burden?**
Convey Control provides a detailed audit trail, which will demonstrate accountability to your professional indemnity insurers.

Senior or Supervisory Partners find Convey Control improves profitability and helps them better manage their team's outputs, making them more productive and less stressed.

About Us

Your questions answered:

- Who are we and why was Convey Control developed?

Courage & Co was founded in 1992 by Archie Courage to provide Information Technology consultancy to the legal profession. In 1996 ConveyPro (now known as Convey Control) was developed in response to changing market needs and client requests. As this software solution established itself as a leading product for high street conveyancing solicitors the business emphasis gradually evolved away from IT consultancy towards providing "best of breed" software solutions for solicitors.

Cockerel Software Ltd was formed in the late 1990's and the business now trades under the styles of "Courage & Co", "Convey Pro", "Convey Control" and "SDLT.co.uk." Today, the business's core activity is providing software solutions to the "property sector" of the legal market. We are affiliate members of the E-Homebuying Forum .

- How we operate?

Convey Control is a technology driven company, which is responsive to changing client needs. Because we always go to clients we do not need expensive city centre offices. We widely use industry standard remote access systems to securely link up to your network for remote training, system updates and troubleshooting assistance.

We welcome your questions about any aspect of the product and service we provide. Our best recommendations come from our existing clients who are pleased to give you a realistic view.

What conveyancers around the country say about **Convey Control**

"Convey Control means that I don't have to type the same old thing over and over as I used to, so I save myself valuable time."

Emma, Secretary, Marshall Hall & Levy, (Tyne & Wear)

"Convey Control means I can do the typing without being able to type."

Hitesh Patel, Partner, Harrow Law Practice, (Middlesex)


"Having used Convey Control for a few months now I can say that our expectations have been met and exceeded. We are particularly impressed with the ease of use and how quickly we were up-and-running. Convey Control is ideal for a High Street practice."

Malcolm Bell, Senior Partner, Harold Bell & Co, (Surrey)

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What conveyancers around the country say about **Convey Control**

 "In my opinion Convey Control enables us to process between 30 to 40% more matters than we could have ever handled using a manual system. At the end of the day, Fridays and completions are so much easier."

Lynda Sheenan, Conveyancing Manager, The Giles Hunter Partnership (Co. Durham)

"In the short time we have been using Convey Control, we have already seen savings in time which have enabled us to take on more work with the same staff."
"Our experience in dealing with Convey Control is of a helpful responsive company who will go out of their way to assist on anything to do with our computer systems, even though it is not their responsibility."

Mr Smith, Partner, Pumfrey & Lythaby, (Kent)

"The website, brochure, demonstration, installation and support of Convey Control does what it says it does, and well!"

Mr Garner, Conveyancing Solicitor, Charles Garner Solicitors (West Berkshire)

"I've been looking for something like this for ten years."

Lesley Richards, Peter Lyn & Partners (Swansea)

"Before I had Convey Control I would never have had the time to do a reference for you on a Friday".

Mr Larcombe, Conveyancing Solicitor, Nick Larcombe Solicitors (Somerset)



SDLT Form Submission

Introducing



Get it right online first time, every time

SDLT.co.uk' is quick and easy to use. It stops both SDLT form rejections from the HMRC (HM Revenue & Customs) and associated negative client feedback. It gives you an SDLT5 certificate by return electronically in seconds.

(Q.) What is 'SDLT.co.uk'? (A.) A stand alone Software application.

It is a software program which ensures that staff can submit HMRC SDLT forms easily, quickly and correctly via the Internet, with an HMRC certificate produced instantly. The validation model ensures that your form is correctly completed BEFORE you submit it. The software can be installed on all of your workstations linking to a central database on your server.

You do not have to have Convey Control or any other case management software as a pre-requisite, but it's a real help if you do.

Case management such as **Convey Control** has the big advantage of automatically completing the form for you, with information already keyed in through the natural progression of a matter.

(Q.) Why start to use 'SDLT.co.uk' now? (A.) No one can afford to continue losing money and wasting time?

Our research indicates that 20 to 30% of the current 8 page SDLT forms are being rejected by HMRC (only around 7% of those, being correctly rejected). This means time wasted and negative client feedback caused by letters sent from the HMRC informing the client of "errors".

'**SDLT.co.uk**' ensures successful SDLT form validation.

'SDLT.co.uk' is the first software application to have been accredited that allows direct integration with the Government Gateway and allows for SDLT5 printing.

*"Being the first to have jumped through the extensive technical hoops required by HMRC, provides a real demonstration of our unrivalled expertise and investment in solving problems for conveyancers who are moving into E-Conveyancing. **Convey Control** potential and current users will gain great added value from SDLT.co.uk".*

Archie Courage Managing Director, Convey Control.

Pay-as-you-go only £6 for each returned certificate (SDLT5)*

(Q.) At the moment we: fill out forms by hand or use HMRC's own online system. Most of the time this works, so why should we change? (A.) Its not as efficient.

With these methods there is always duplicated data entry, and the chances of not filling in a paper form correctly and getting it rejected are quite high. Duplicated data entry and potential rejection by HMRC means these methods can cost your firm time and money. Many firms are not even charging for this time? The table overleaf shows the various issues around the options that you have for completing SDLT forms.

(Q.) What about the client signing the form? (A.) You do NOT submit a signed form to HMRC. With e-submission of an SDLT form, HMRC assume you have your client's authority to complete and submit the form. The electronic form does not need to be signed. However it is important to obtain your client's authority to do the submission. We find many firms now build this into their client care letter terms whilst others use the ability to print out a summary of the form answers and a client declaration sheet from the SDLT.co.uk software for the client to approve.

(Q.) If I use 'SDLT.co.uk', how do I pay the actual tax? (A.) As usual.

HMRC offer various ways, with a cheque and payslip as you do now or electronically via BACS.

(Q.) Can I have a FREE Trial to see whether 'SDLT.co.uk' will suit our practice? (A.) Yes.

We offer 3 FREE of charge submissions to prove to you how useful a service this will be.

Thereafter 'SDLT.co.uk' charge a simple 'Pay as you Go' fixed fee of £6* + VAT per returned SDLT 5 certificate, which means you can try it out without the need for a Partners meeting to approve a large spend taking months for approval.

(Q.) How is 'SDLT.co.uk' service paid for and by whom? (A.) Your client should pay the service cost.

We charge you via a monthly direct debit from your bank,. Five days before the payment date, you are emailed the previous month's transaction report and a copy invoice for your cashiers. Most firms pass on the submission fee of £6* + VAT directly to their client (just as they would a search fee). The net result, a time saving facility at no cost to your firm. NOTE: The Law Society's guidance is to charge £50 + VAT (for your time) for each client's SDLT form that you complete.

*Current fee for SDLT.co.uk Compose Offline / Submit Online system.
Fees subject to change and prices quoted exclude VAT.

Stop losing money

On SDLT form submissions

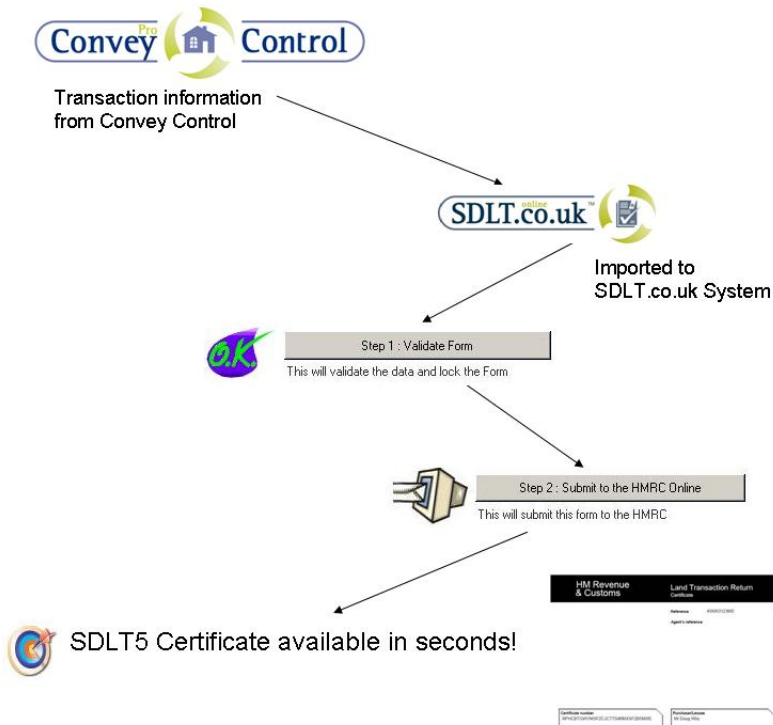
The table defines and compares the different issues [see column 1 and 2]
Column 3 is with 'SDLT.co.uk'.

1	2	3
<p>Manually fill in a form</p> <ul style="list-style-type: none"> • Takes about 30 minutes, • Constantly writing the same thing in for every form, • Needs client to sign it, • Form must not be folded, • Correct completion of the form is difficult and prone to being rejected, • Incorrect reading of the form by HMRC creates WRONGLY rejected forms and subsequent hassle and more time consumed, • Its all a manual process needing a cheque, payslip, paper form, and to be posted. • Return Certificate takes a long time, typically 3 weeks, • YOU get bad 'P.R.' when client is told by HMRC of rejected form. • Paper – how out of date is that! 	<p>Use HMRC's own online system</p> <ul style="list-style-type: none"> • Does not integrate with anything or anyone. • General Revenue & Customs call centre. • Cannot create time saving templates, average return takes 15 minutes.. • No time saving databases or address books. • Forms stored for 30 days – no audit trail provided. • Basic printing options • Different form layout – training required. • Error messages difficult to interpret. • Must have constant access to the Internet and HMRC systems • Users have no real feedback or ability to influence. • HMRC... is a Government department.... No comment 	<p>Use SDLT.co.uk</p> <ul style="list-style-type: none"> • Takes 1 minute with Convey Control, or any accredited case management provider and 3 to 5 minutes without, • Dedicated SDLT.co.uk help desk • Can create multiple time saving templates • When linked with Convey Control all transaction information already entered automatically pre-populates the form • Forms are stored permanently and are viewable across the firm's computer network. Helps comply with Law Society rules to maintain full and accurate client records • Easy to navigate, same layout as paper forms and errors reported before submission in plain English • HMRC online access not necessary to draft forms • Privately run company with "total customer service" ethos.
£75 a form**	£37.50 a form**	£ 6 a form***
Based on typical charge-out rate for a firm of £150 per hour		*Based on current SDLT.co.uk e-submission fee, excl VAT. (Compose offline/Submit Online)
Assuming an average High Street firm does 250 SDLT forms per year, below is your annual direct COST!		
£18,750	£9,375	Zero <i>the client pays £6 + VAT as a disbursement</i>

Would you like to STOP LOSING MONEY and START SAVING TIME on SDLT forms?
The answer is 'SDLT.co.uk'

How does SDLT.co.uk work?

How safe is it?



For more information visit our website www.sdltd.co.uk
Click on Register and we can authenticate you and set up an account, making getting started much quicker or please call 0845 6526 855