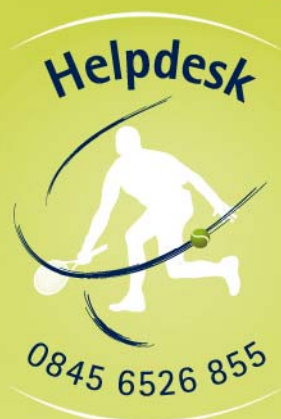




# Progress Report

From Convey Control.. the new name for Convey Pro

Matter progress published to the Web  
... FREE to TRY until 31st March 2009



## What is Progress Report?

**Access Anytime** – Progress Report is a 24/7 password protected website that allows clients, referral sources, estate agents etc access to relevant Conveyancing Progress Reports from Convey Control together with automatic client email or mobile text alerts of significant milestones.

**You're in control** – you the Conveyancer are in control of who has access to what updates. Don't worry no one outside your firm has direct access to your files or computer systems. You specify what the significant milestones are and choose which (max of 5) are automatically texted or emailed to the client.

**Who can access progress information?** – by default clients and contacts have **NO ACCESS** –you simply tick the boxes in Convey Control to enable access per relevant party on a matter by matter basis.

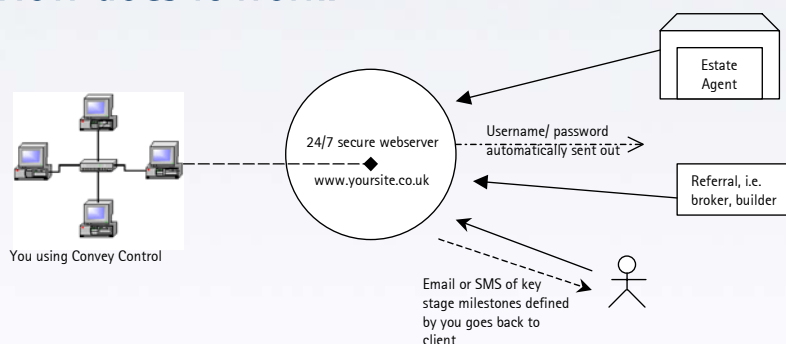
## Why start to use Progress Report?

Originally the demand for online access to matter progress on transactions was seen to be driven from your clients. However in recent times we have found the Estate Agents/ Referral sources are increasingly requesting access to this information. This shift in demand has created a recent uptake of our Progress Report service with clients saying all matters are to be uploaded to the Web to allow referral sources access. If the Estate Agent were to call your office for an update you would tell them over the phone, so why not instruct them to look at your website instead? It amounts to the same thing whilst also reducing phone calls, letting you to progress matters more efficiently.

## Progress Report & E-Conveyancing

The Convey Control Progress Report allows publishing to the Web. As new e-conveyancing initiatives arise we continue to look at how Convey Control can provide information to 3<sup>rd</sup> party systems. This is another reason to start using the 'Progress Report' as the drive towards E-Conveyancing via the Transformational Government initiative is only going to gain in momentum. Remember Convey Control also provides integration with online search providers and e-submission of SDLT returns via Convey's sister product – SDLT.co.uk.

## How does it work?



## What do I need?

You need Convey Control version 2.8.79 or above together with the Web Upload Utility 2.7.3 or above. All updates to both applications are available to clients who have an ongoing support contract for Convey Control. New and existing matters are easily uploaded at the touch of a button. A 5 minute telephone call to the Convey Support team will have you up and running.

## Simple Billing...

### Pay as you Go

Our billing policy is one of 'Pay as you Go' and paid by Direct Debit. Payment cannot be via cheque as this would increase our costs and mean a higher price for the service.

### Monthly E-Statements

Five days before the payment date, you are emailed the previous months transaction report and a copy invoice for your cashiers. This will show which matters you have flagged as being web publishable and that is your acceptance of the Terms of Use for the Progress Report facility.

### Direct Debit Payment

We take payment on the 6<sup>th</sup> day or as close to that day as we can process. You are highly likely to already have a Direct Debit mandate set-up with us for the purpose of collecting your SDLT.co.uk E-Submission fees in which case the admin is already sorted. Just get any necessary partner approval and you're ready to go.

## Contact Us...

To get up and running with Convey Control's Progress Report simply call or email the Archie or Mike:

**Tel: 0845 6526 855**

**Email: [info@conveypro.co.uk](mailto:info@conveypro.co.uk)**



## Frequently Asked Questions....

### How much does it cost to use Progress Report?

The cost is £6.00 + VAT per matter uploaded (see panel opposite). We suggest you pass this onto the client as a disbursement if they wish to use the service. There are no other fees or costs.

Remember the client can opt in or out of using this service. If you are of the view that keeping the Referral source happy is of paramount importance then you can have a policy that says, *"All matters are available to all clients, referral sources etc whether the client wishes to use the service or not. Its all part of the service we offer."*

### I want to try out 'Progress Report' , can I try before I buy?

*Until the 31<sup>st</sup> March 2009 you can upload as many matters as you like to the Progress Report website FREE of charge.* From 1<sup>st</sup> April all new uploads will be charged at the standard rate of £6+VAT per matter.

### Can I let a 3<sup>rd</sup> Party have access if the client has not opted-in?

The answer is YES – the 3<sup>rd</sup> party is just accessing the Web instead of ringing you for an update. You can suppress emails/texts to the client if the client does not wish to use the service. In this case of course you would not be charging the client for a Disbursement cost of the service and you would be taking it as an Office Cost. Anyone can login and use the service as many times as they like, it makes no difference in terms of service cost.

### How do I give someone a Username and Password?

You don't. The system does – all you need to do is tell Convey Control that you want 'a party' to have access and it generates the security details on your behalf and emails them direct to the recipient. If they lose their password they can easily request a new one. There is only one password per 'party'. If they forget or lose their Username, (which is their email address) then a reminder can be requested via ourselves.

### Do I need a website for this to work?

No, but it is nice to have one. The automatic email described above, has the address of where to go on the internet in the message. However with think it is better for you to tell all clients to go to YOUR website, where there is a button saying something like "View your conveyancing progress report" and that links through to our secure 24/7 website.

### I have further questions about Progress Report...

If you would like to discuss any further queries or ideas on wording of client care/ instruction and how to market this to agents or referrals, please feel free to call Archie or Mike.