

## The P4W Residential Conveyancing Starter Kit

# Enhance the delivery of your property services

Our time saving residential property workflows have been developed to ensure busy conveyancing teams can easily navigate the purchase, sale, and transfer of equity on conveyancing matters. It's been designed to automate time consuming manual processes, and improve productivity and accuracy, while managing the risks associated with data, deadlines, and compliance.

#### How it works

The simplicity of the P4W Conveyancing Workflow offers your team a smooth user experience. Once a matter of a relevant case type is created, all the user needs to do is process the workflow steps, following on-screen prompts. They can enter relevant property details, add the required contacts, and then simply select the workflow they want to process. All the relevant items needed will be automatically added to the case history, whilst retaining the flexibility to use ad hoc letters, documents, and emails as necessary.

#### **Tailored approach**

This workflow platform is highly configurable. If you have unique processes or requirements, the P4W consultancy team will be happy to assist in tailoring the workflows and documents to suit your firm's work methods.



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Title	Nator	34	Sale of 14 Castle Road						
Prepare Contract	File Number		Case Tape Stater 10 Sale						
Pre-Exchange									
Pre-Exchange Checklist	Sep 10		M. V. Description	Orazion Date	Start Due	Consistent	Spd Last Action	Atta	м
Transfer Funds	- @ 27		5 - PRE-EXCHANCE	30/09/2022		30/06/3022	04471		1
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Completion Statement	- Cil 27	606	Pre-Exchange Checklist	30,09,2022					
Formula C.Authority		27687	5 - Pre-exchange checklists	30,499,2022				9471	
Exchange	-0.0	661	5 - Client Funds Transfer Details	30/09/2022		30/06/2022	UN71	9471	
Pre-Completion	- 0 2	605	Sander Funds	30/09/2022					
Completion		27689	5 - Letter to client(s) endosing-funds transfer form	30/99/2022			UATI	9471	
Post-Completion	- 0	27690	5 - Itanuter of funds	30/09/2022				0401	
			5 - Tanufer Received	30,99,2022		30/06/2002	0401	9471	
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	10 10 27		Chace Redemption	30,99,2522					
		27682	5 - Letter to lender chasing redemption figure	30,95,2022				0471	
		27680	5 - Redenption figures in	30/99/2022	15/10/	3662	UM71	947	
			5 - Produce Preliminary Completion Statement	30,99,2022		30/06/2022	UNCT	9471	
	* 🗐 D	004	Completion Statement	36/99/2022					
		685	5 - Formula C Authority	30,99,2022		30/06/2022	UM01	0471	
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#### **Key Benefits:**

- Reduce pressure on staff with easy-to-follow workflows
- Optional integrations with InfoTrack and Perfect Portal
- Automate repetitive data entry
- Reduce the risk of data errors
- Ensure all key stages are reached on time

#### **Key features:**

- · Each step of the process has been given specific workflows which bring through related milestones, pre-coded letters, documents, and forms
- · Easy to track milestones ensure fee earners can see exactly what's been done, and what's left to do
- Pre-coded letters and documents are included in the workflow to save time and reduce the risk of errors
- · Integrates with OyezForms, Laserforms and Cloud Forms to ensure the required forms are available within the workflows
- · Custom data screens capture required information for sale, purchase, and transfer of equity matters, reducing the need for duplicated data entry
- · Task reminders and key dates ensure nothing gets missed or forgotten
- · Includes maintained SDLT and Land Registry fee calculators
- Optional integrations with InfoTrack and Perfect Portal save significant amounts of time.



Conveyancing Workflow case milestones

Sent To Estat

Conveyancing Workflow customised data

### **Talk to Advanced**

To discover how P4W Residential Conveyancing can help you achieve your goals, get in touch today

#### **Contact us**







