

# Easy step by step guide

Below is a guide on how to quote for, and instruct a firm for Conveyancing

## QUOTING JOURNEY

# 1

### STEP 1

Sign in to eConveyancer

01844 265444 | e: eConveyancer@ulstechnology.com

**Welcome to eConveyancer**  
Please enter your User Name and Password to sign in

User Name   
Password   
Forgot Password?

This website has been optimised to run on the latest browser technology. For the best user experience we recommend viewing this site with the latest supported version of your chosen internet browser.

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# 2

### STEP 2

'Preferences' enables you to change your password

Select Quote Type from the main menu

preferences sign out

01844 265444 | e: eConveyancer@ulstechnology.com

Name: Mrs A Test  
Company: Test Company

Home New Quote Quotes Instructions Reports Information Billing My Account

Products

**Conveyancing**  
eConveyancer is a simple, quick and efficient way to refer customers to a conveyancer. Click for more information

Buy a House	Buy to Let Purchase	Remortgage
Buy and Sell a House	Limited Company BTL Purchase	Cashback Remortgage
Sell a House	Let to Buy	Limited Company BTL Remortgage
	Transfer of Equity	Fixed Fee Remortgage
	Multiple Cases	

Wills

# 3

### STEP 3

Enter Customer and Property details

Search for Existing Clients

preferences sign out

01844 265444 | e: eConveyancer@ulstechnology.com

Name: Mrs A Test  
Company: Test Company

Home New Quote Quotes Instructions Reports Information Service Management Maintenance

**Quoting**

**Your Customer**

Number of Customers: 1

Customer 1	Title	First Name	Last Name	Existing Customer
Customer 1				<input type="checkbox"/>

**Buy a House**

Choose an existing customer:

Country:   
Property Purchase Price:   
Tenure: [Please select]  
Purchase Address:

# 4

## STEP 4

All Quotes will be shown

Click 'Compare Top 3 Quotes' to view the Cheapest, Nearest and Best Rated Quotes

Click on 'View Quote' to see a full breakdown of the selected quote

Sort quotes by Cheapest, Nearest, Best Rated or Alphabetically.

Click on 'Saved Quotes' to view any quotations

The screenshot shows the 'Quoting' page for 'Mr A Test, Purchase of Sample House, Sample Address'. The 'Conveyancing' tab is active, displaying a table of quotes from various service providers. A 'Compare Top 3 Quotes' button is visible. The 'Purchase Details' sidebar on the left shows information like 'Purchase Price: £250,000' and 'Tenure: Freehold'. A 'Saved Quotes' button is in the top right corner.

Service Provider	Distance	Rating	Fee	Jobs	Total
Service Provider Sample 1	DigitalMove 103.9 miles	100% / 4	£704.40	£444.00	£1,148.40
Service Provider Sample 2	DigitalMove 135.3 miles	91%	£704.40	£444.00	£1,148.40
Service Provider Sample 3	DigitalMove 142.5 miles	83%	£704.40	£444.00	£1,148.40
Service Provider Sample 4	DigitalMove 87.6 miles	89%	£704.40	£444.00	£1,150.40
Service Provider Sample 5	DigitalMove 128.0 miles	81%	£722.40	£444.00	£1,166.40
Service Provider Sample 6	DigitalMove 34.8 miles	81%	£722.40	£444.00	£1,168.40
Service Provider Sample 7	DigitalMove 113.2 miles	91% / 19	£728.40	£443.00	£1,173.40

# 5

## STEP 5

Click here to change any Quote Details

The screenshot shows a detailed 'Conveyancing quotation' for 'Mr Test'. It includes a breakdown of costs: 'Legal fee' (£387.00), 'Stamp Duty' (£171.00), and 'Purchase price' (£100,000.00), totaling £1,148.40. A 'Change Quote Details' button is highlighted in the sidebar. The 'Purchase of Sample Address, Address 2, Address 3, Address 4, Postcode' section is also visible.

# 6

## STEP 6

Confirm Client Details

The screenshot shows the 'Confirm Customer Details' form. It includes fields for 'Title', 'First Name', 'Middle Name', 'Last Name', 'D.O.B.', 'Home Tel', 'Mobile Tel', and 'Email'. There is a checkbox for 'Use this email address to receive automatic updates' and a 'Correspondence Address' field. A 'Purchase Address' dropdown is also present. The 'Next' button is highlighted.

# 7

## STEP 7 Confirm Quote Details

The screenshot shows the 'Confirm Conveyancing Quote' page. It includes a navigation menu with 'Home', 'New Quote', 'Quotes', 'Instructions', 'Reports', 'Information', 'Service Management', and 'Maintenance'. The main content area is titled 'Confirm Conveyancing Quote' and contains a 'Purchase Details (Sample Address)' section. This section includes a 'Property' form with fields for 'Purchase Address', 'Address Line 1-4', 'Postcode', 'England', 'Price' (£250,000.00), and 'Tenure' (Freehold). Below the form are several checkboxes for property types and services, such as 'Auction', 'Buy To Let', 'First Time Buyer', 'Gifted Deposit', 'Help to Buy - Equity Loan', 'Help to Buy (SAs)', 'Limited Company BTL', 'New Build', 'Repossession', 'Right To Buy', 'Second Property', 'Shared Ownership', and 'Unregistered Land'. A 'Mortgage' section is also visible. On the right side, there is a 'Buying / Selling Costs' summary box showing 'Conveyancing (Purchase)' for £148.40, with a 'View Quote' link.

# 8

## STEP 8 Confirm Instruction

Choose a preferred case handler if required and add any Notes for the Conveyancer's attention

The screenshot shows the 'Confirm Instruction' page. It includes a navigation menu with 'Home', 'New Quote', 'Quotes', 'Instructions', 'Reports', 'Information', 'Service Management', and 'Maintenance'. The main content area is titled 'Confirm Instruction' and contains a 'Purchase of Sample Address, Address Line 2, Address Line 3, Postcode, England' section. This section includes a 'DigitalMove' checkbox, a 'Service Provider' dropdown menu, and a 'Case handler' dropdown menu. Below these is a 'Notes' text area. At the bottom, there is a confirmation statement: 'I confirm that the customer has received a copy of quote EC358910/020GQ/QUO and would like to instruct Sample Solicitor (Sample Address) in accordance with these terms'. There are 'Cancel' and 'Submit' buttons at the bottom right.

# 9

## STEP 9 Case Tracking -Click 'Instructions' on the menu

Each case can be tracked online 24/7. You will also receive an automatic email when each key stage of the transaction proceeds

The screenshot shows the 'Case Tracking' page. It includes a navigation menu with 'Home', 'New Quote', 'Quotes', 'Instructions', 'Reports', 'Information', 'Service Management', and 'Maintenance'. The main content area is titled 'Purchase Details (Sample Address)' and contains a 'Details' section with a search bar and 'Additional Contacts' section. Below this is a 'Progress' section with a 'Milestones' table. The table has columns for 'Milestones', 'Expected Date', and 'Completed Date'. The milestones listed are: 1. Case Created, 2. Starter Pack Received from Customer, 3. Customer ID Verification Received, 4. Contract Requested from Seller's Solicitor, 5. Contract Received from Seller's Solicitor, 6. Searches instructed, 7. Title Confirmed, 8. Contract Approved, 9. Replies to All Enquiries Approved, and 10. Searches Received.

