# **Conveyancing Portal**User Notes

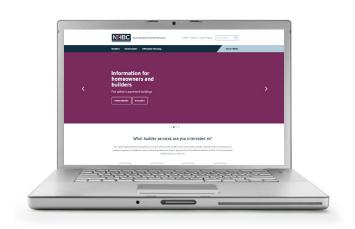


## **Contents**

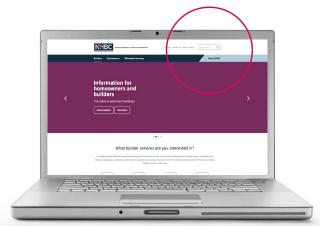
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# Register for a new account - new company

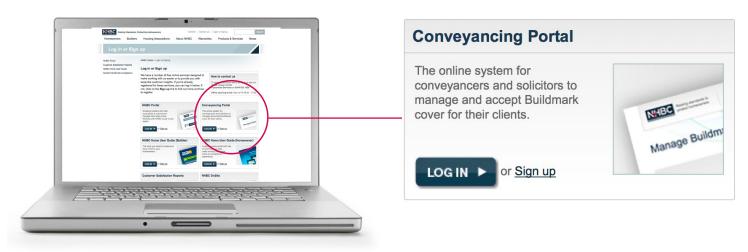
1. Go to NHBC website



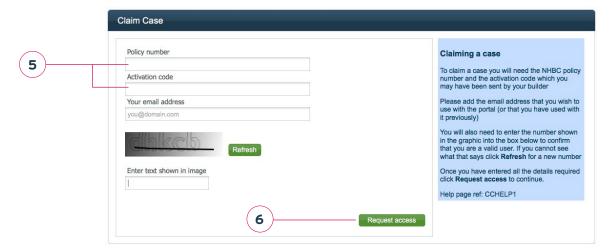
2. Click on 'Log in or Sign up'



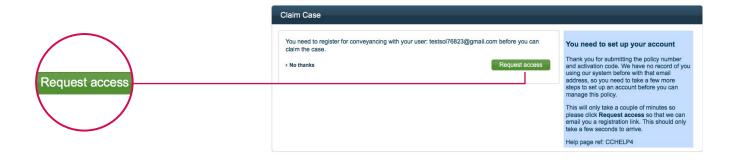
3. In Conveyancing Portal box, select 'Sign up'



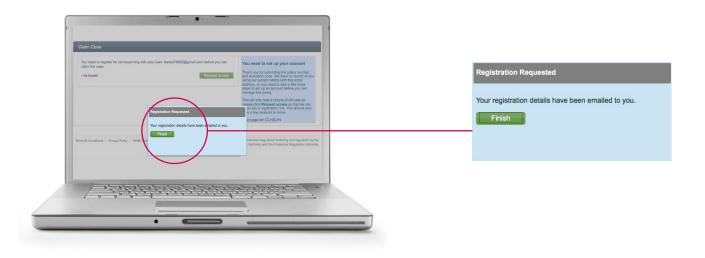
- 4. You will be taken to a claim case form
- 5. Have your policy number and activation code to hand
- 6. Complete the form with relevant details and click 'Request access'



7. You will be asked to request access to the Conveyancing Portal - click 'Request access'



- 8. A message will appear telling you that your registration details have been sent to you
- 9. Click 'Finish'



10. You will receive an email to register



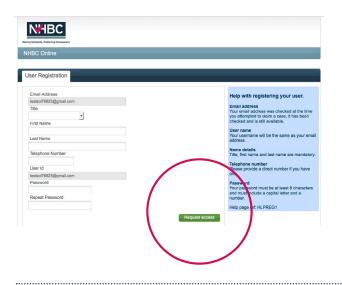
11. Click on 'Register for Conveyancing Portal'



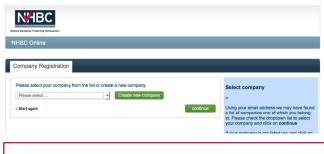
12. The next screen 'User Registration', asks you for user and password details



13. After completing, click 'Request access'



14. Complete office details and click 'create office'



#### Points of note

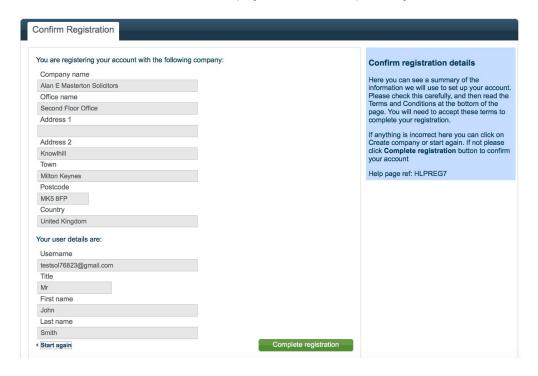
You will only need to go through the process of setting up an account for your first case, thereafter you will go in via the CP Log in page.

If there are already users of CP in your business, they have the ability to add you as a user.

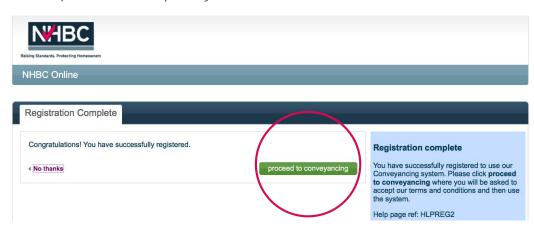
15. Enter company registration details and click 'continue'

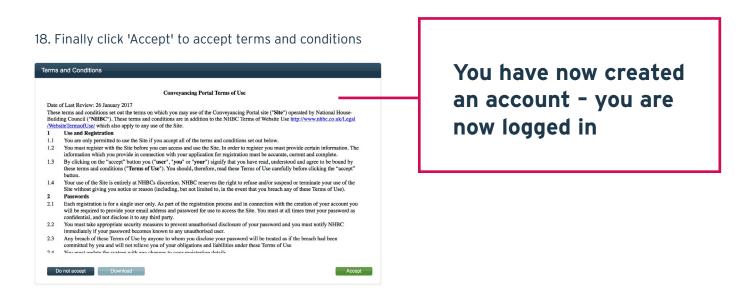


16. Please confirm all details on next page and click 'Complete registration'



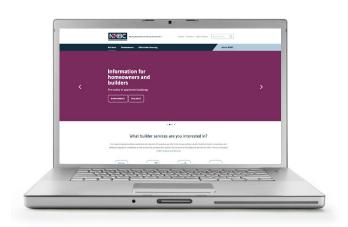
#### 17. Click 'proceed to conveyancing'

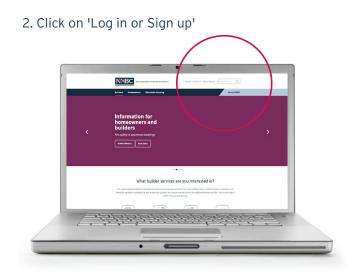




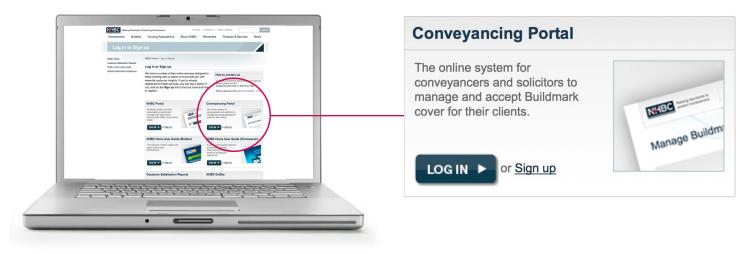
# Register for an account - existing company

1. Go to the NHBC website www.nhbc.co.uk





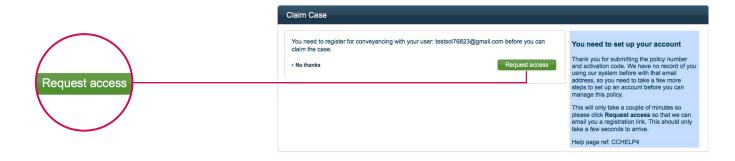
3. In Conveyancing Portal box, select 'Sign up'



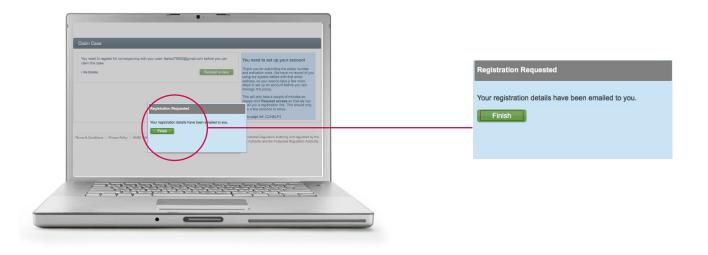
- 4. You will be taken to a claim case form
- 5. Have your policy number and activation code to hand
- 6. Complete the form with relevant details and click 'Request access'



7. You will be asked to request access to the Conveyancing Portal - click 'Request access'



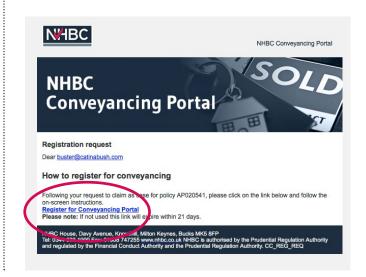
- 8. A message will appear telling you that your registration details have been sent to you
- 9. Click 'Finish'



10. You will receive an email to register



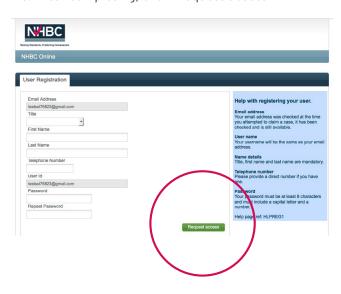
11. Click on 'Register for Conveyancing Portal'



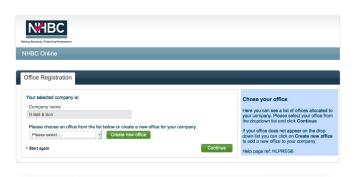
12. The next screen called 'User Registration', asks you for user and password details



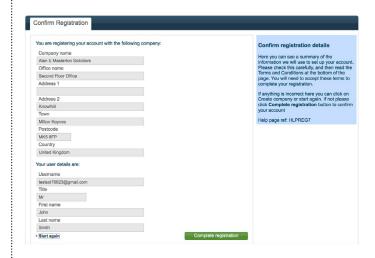
13. After completing, click 'Request access'



14. Choose office from list or create new in office registration area and click 'Continue'



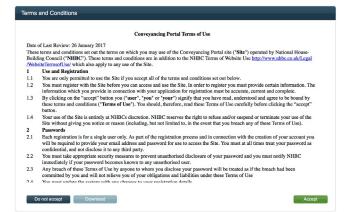
15. Review details and click 'Complete Registration'



16. Congratulations you have successfully registered, click 'proceed to conveyancing' to start working on your policies

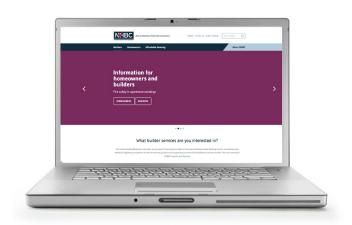


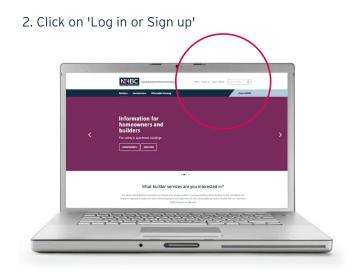
17. Finally click 'Accept' to accept terms and conditions



# Log in to your account

1. Go to the NHBC website www.nhbc.co.uk





3. In Conveyancing Portal box, select 'Log in'



4. Enter your email address and password

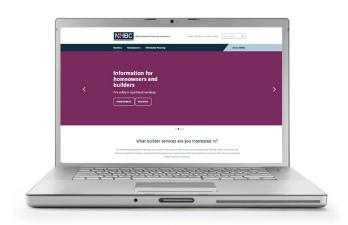


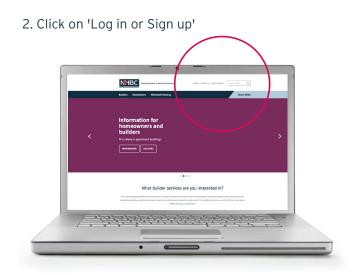
Please note Your username is always your email address

5. Follow the instructions in the email that you will receive

# Reset your password

1. Go to the NHBC website www.nhbc.co.uk





3. In Conveyancing Portal box, select 'Log in'



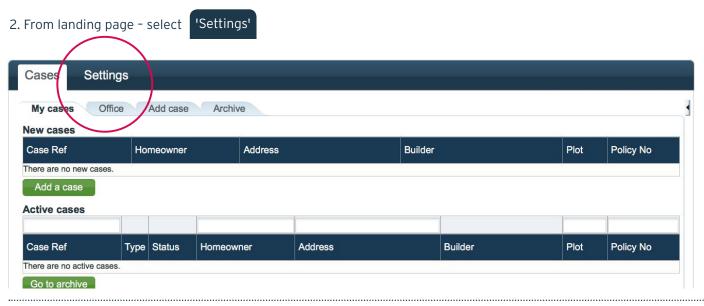
4. Select reset your password



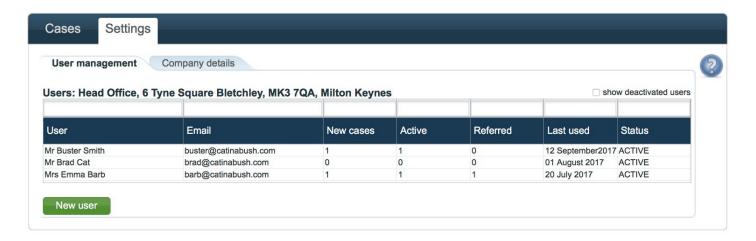
Please note Your username is always your email address

# Update account information

1. Log in to Conveyancing Portal



List of users from the current office selected are displayed in top box



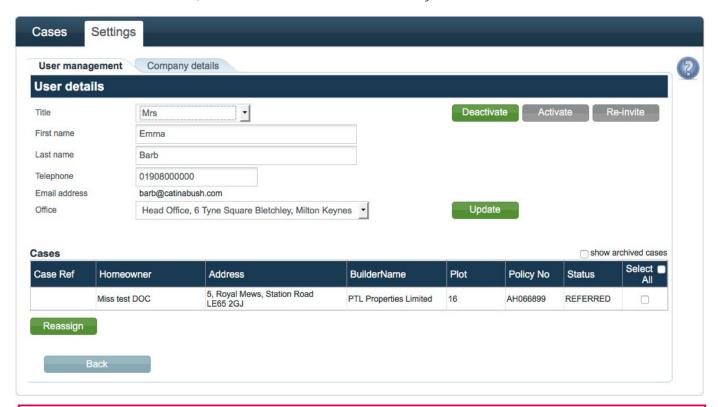
List of users from other offices selected, are displayed in bottom box

#### Edit user details

- 1. Log in to Conveyancing Portal
- 2. From landing page select 'Settings'
- 3. Click the user you wish to edit



4. You can edit a contact name, number and office address OR reassign cases from one user to another

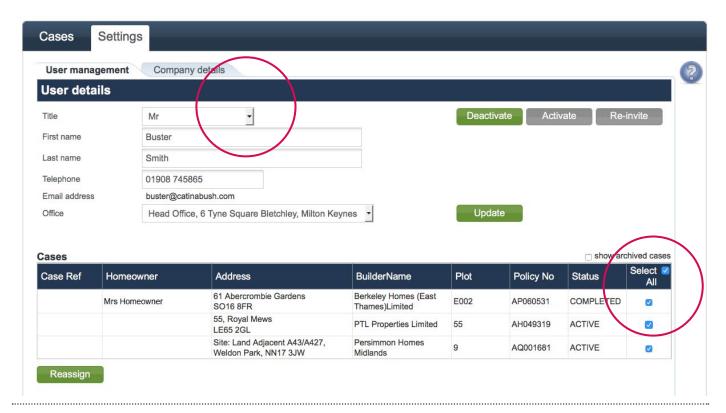


#### Please note

You cannot edit the email addresses as these are used as user names

# Reassigning cases to another user

- 1. Log in to Conveyancing Portal
- 2. From landing page select 'Settings'
- 3. Select the user that the cases are currently assigned to
- 4. Choose the cases you wish to reassign by ticking "select all" or by clicking the box next to each applicable case



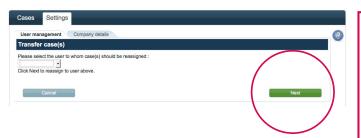
5. Once you have completed your selection, click 'Reassign',



6. Choose the new user from the drop down list



7. Click 'Next'



8. You have now reassigned the case

#### Please note

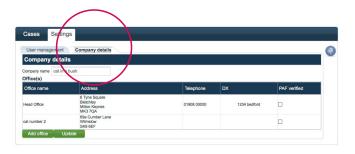
You can only reassign to a user in the list. A new user would need to register an account first

## Add an office

- 1. Log in to Conveyancing Portal
- 2. From landing page select

'Settings'

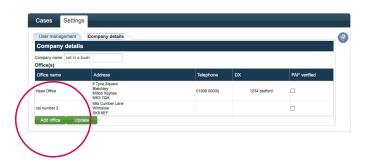
3. Select 'Company details' in tab



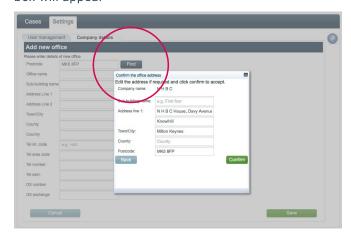
4. Company name and office addresses will be displayed



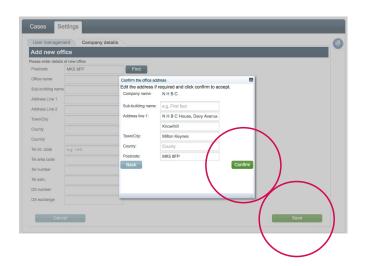
5. Click 'Add office'



6. Enter the postcode and address details and click 'Find' to search for the address of the office. A pop up box will appear



- 7. A list of matching addresses will be displayed. Select your address and 'Confirm'
- 8. The pop up box will then disappear, click 'save'



9. The new office address will now appear in the list

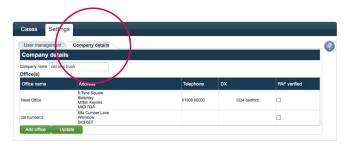


## Edit office details

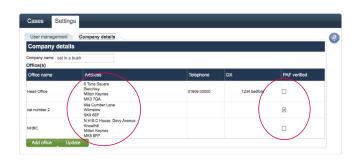
- 1. Log in to Conveyancing Portal
- 12. From landing page select

'Cases'

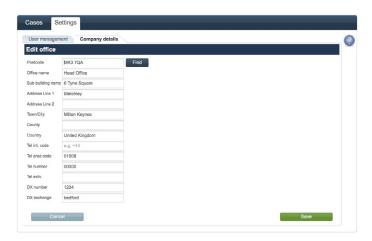
3. Select 'Company details' tab. Company name and office addresses will be displayed



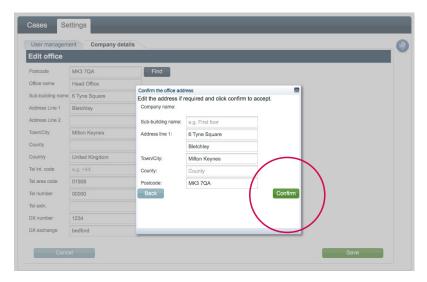
4. Click on the office you wish to edit



5. Details page appears



6. Update information, click 'confirm' then 'Save'

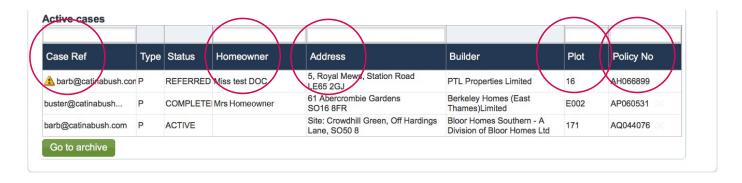


## List of cases for your office

- 1. Log in to Conveyancing Portal
- 2. From landing page select | 'Settings'
- 3. Select 'Office' tab to view a list of all cases assigned to your office



4. You can search for active cases by typing your case reference, homeowner, address, plot number or policy number into these boxes



5. Archived cases can be found by selecting the 'Go to archive' button or by selecting the 'Archive' tab. This allows you to view all historic policies you have activated (cases are automatically archived 30 days after completion/final certificate has been updated). If case was added by someone else within your company, click 'Company archive to view



#### How to add a new case

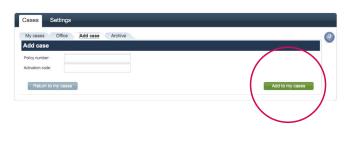
- 1. Log in to Conveyancing Portal
- 2. From landing page select



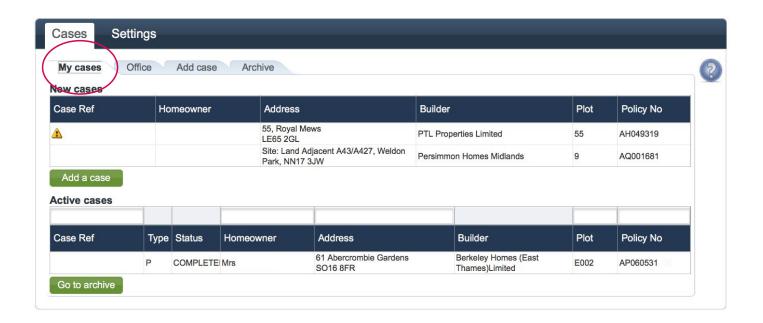
3. To add a case, either select 'Add case' tab or 'Add a case' button



4. Enter policy number and activation code. Click 'Add to my cases' button



5. The case will now appear under your new case in the 'My cases' tab

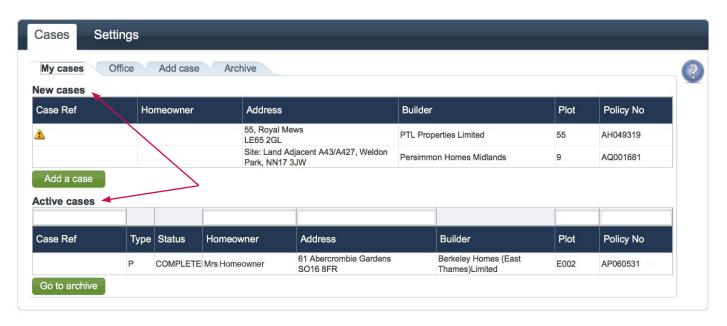


## Overview of activating a policy - screen flow



# Working on a case

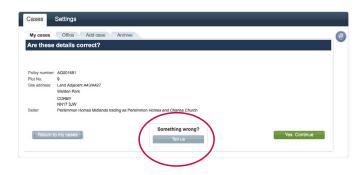
1. Within Cases tab select case from either 'New cases' or 'Active cases' list



- 2. Check the details are correct (Yes/No)
- 3. If yes what is your role? Select whether you are acting on behalf of a purchaser or vendor. Click 'Next'



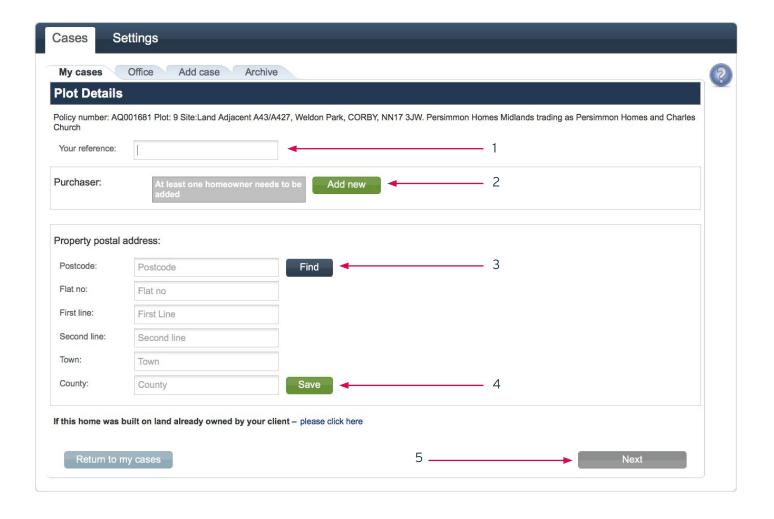
4. If the details are not correct you can tell us by clicking on the 'Tell us' button



Please go to page 22

# How to complete plot details

- 1. You can enter your own reference for this case here if you have one
- 2. The developer may have already provided the Purchaser information. If your client name is already listed on the screen, please click 'Accept' as client. If the name of client does not match click 'Remove' and 'Add new'
- 3. Enter the postcode for the property being purchased and click 'Find'
- 4. Then click 'Save'
- 5. Then click 'Next'



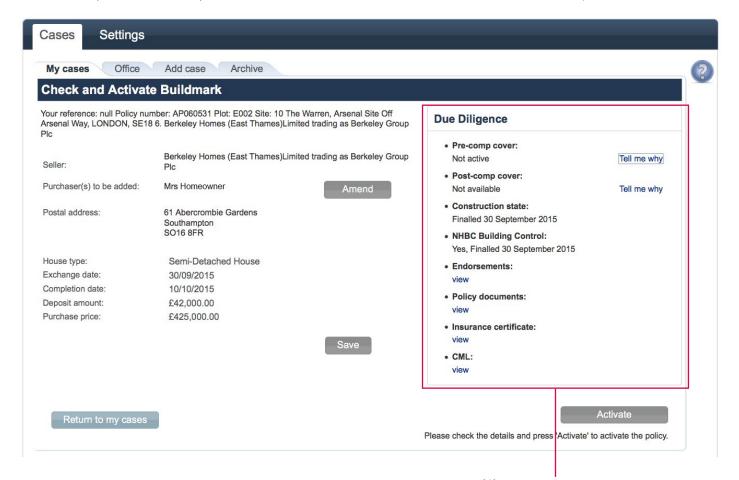
#### Please note

You need to add at least one purchaser or accept as client and the property postal address to enable the 'Next' button

#### How to check and activate Buildmark

Under 'My cases' tab please select the case you want to activate

- 1. Select House type
- 2. Enter Exchange date
- 3. Enter anticipated completion date (if known), deposit amount and purchase price
- 4. Select 'Save' to save details at this point, or 'Activate' if exchange date/has passed
- 5. Cases may be automatically referred to NHBC Customer Services if there are certain discrepancies

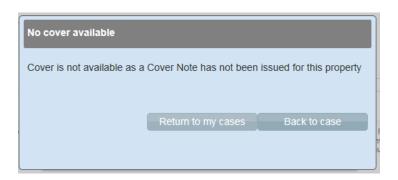


- 6. Check the details are correct
- 7. Click 'Next'
- 8. Check you have entered homeowner email address
- 9. Click 'Activate'

#### Due Diligence.

You can view and download available documentation here. If this is not available, select Tell me why.

When activating a policy you may get the message below.



#### Please note

If you have a cover note, you should receive a email to confirm the certificate has been issued. If you haven't received this after 1 hour of activating, please call Customer Services on 0344 633 1000 who will look at this for you.

## If you are working on a case and something is wrong

Select relevant reason from the list

- 1. Remove Case you will then be required to enter a reason
- 2. Transfer to different user this will transfer case to another colleague in your office
- 3. The listed seller is incorrect select correct seller from list, if other is selected please provide the seller in text box provided
- 4. The plot/site details are incorrect you will then need to enter correct plot / site details
- 5. Click 'Next'



## Alerts - cases that need your attention

Alerts are shown on the 'My cases' tab to remind you of missing information, or policies that have now passed the anticipated dates, but have not been confirmed.

You can click into the alert, and be shown the policies with this alert, as well as update the information to clear the alert.

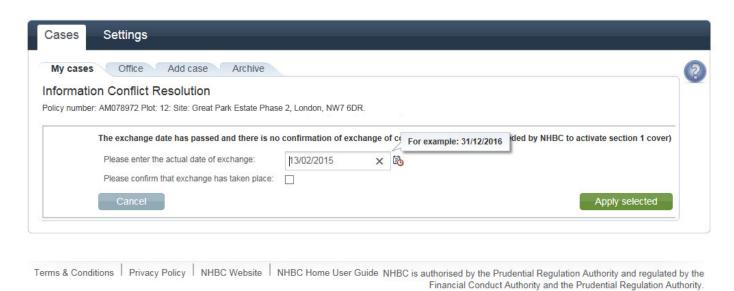


#### Please note

The alert for not providing an email address for the purchaser is a reminder that if you do have one, please add it. This will not affect you activating the policy or stop an insurance certificate being issued.

#### Alerts - information conflict resolution

Select the relevant case from the 'Alerts' section Update the details and click 'Apply selected'



## Alerts - referral to NHBC Customer Services

Sometimes a referral will need to be dealt with by NHBC Customer Services.

Please provide a contact telephone number in case they need to telephone you to discuss the case. Once the referral has been cleared it will re-appear on your active cases section.



#### Talk to us...

If you need further help call our team on **0344 633 1000** and ask for 'Customer Services' or email cpsupport@nhbc.co.uk

If you would like to join our Conveyancer user panel, please email cpuserpanel@nhbc.co.uk

