

PLS.

SOLICITORS

# PLS Solicitors 24/7 Portal User Guide

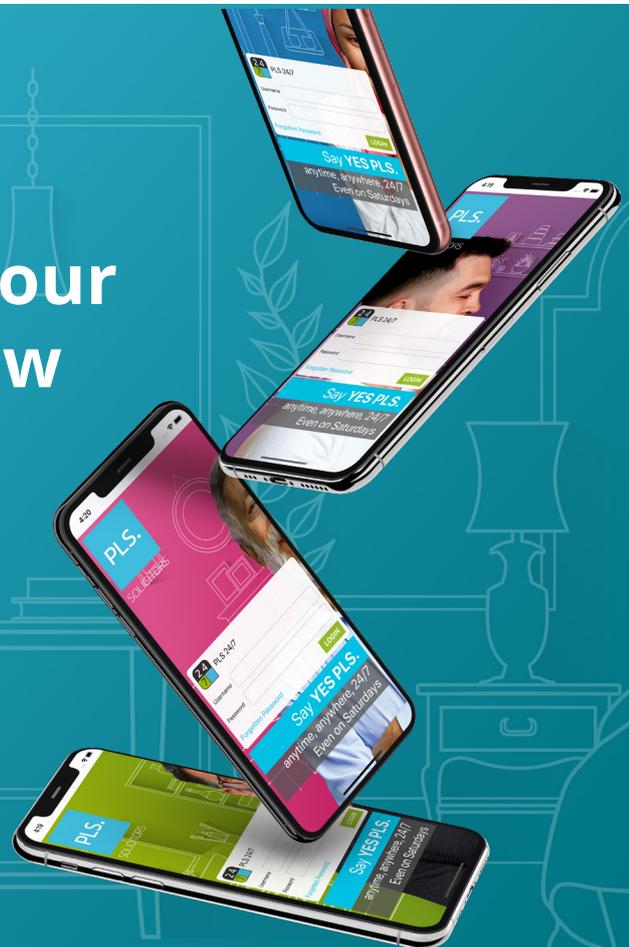
We have developed the PLS Portal 24/7 to allow our property clients to review and action their case securely on line.



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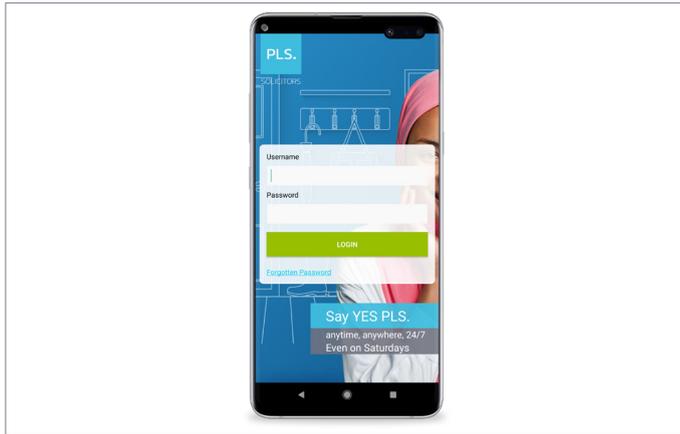
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“Our customers have one thing in common – life got faster. With over 900 transactions a month, where 90% of business is done over the phone or through the PLS Portal 24/7, keeping clients happy has to be the number one factor in taking our firm to another level!”

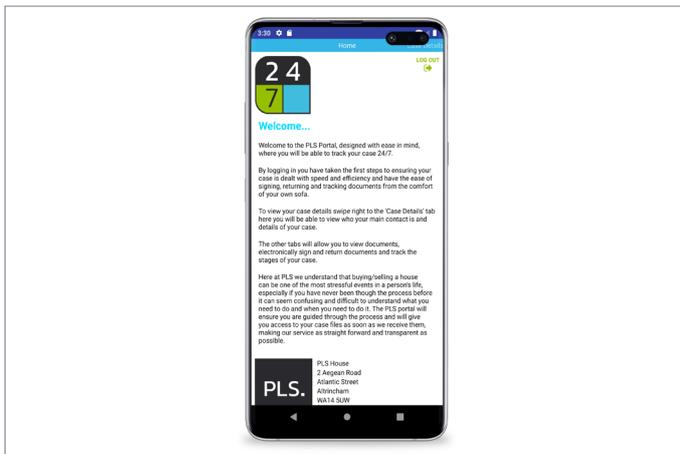
Aash Dhand Co-Founder of PLS Solicitors

The PLS Portal 24/7 App allows you to review your case online. All you need is access to the Internet, through your Phone, or Tablet. You can view any documents, letters, emails from us and you can contact us through the Portal by sending a message. You can complete and sign documents online and you can track the progress of your case. This quick guidance note gives you the basics. Please read this note in full. It won't take long to get the hang of it.



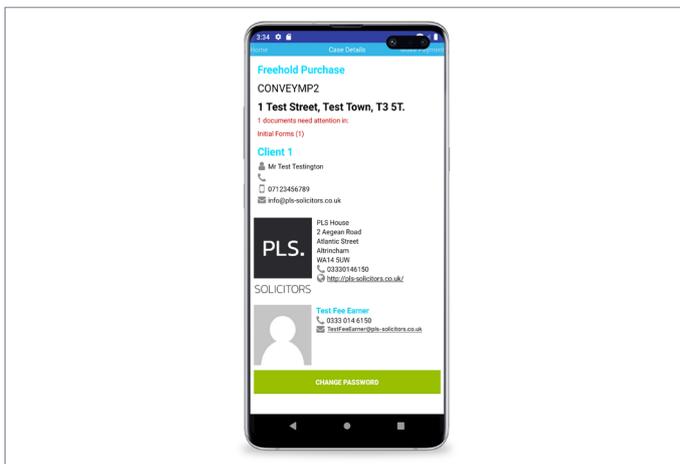
## Stage 1 - Login Screen

Welcome to the PLS Portal 24/7 Login Screen. You will have received a Login username and password in a separate email. Type your Login and Password into the provided fields and click "Login". (If you haven't received an email from us with your login details please call us).



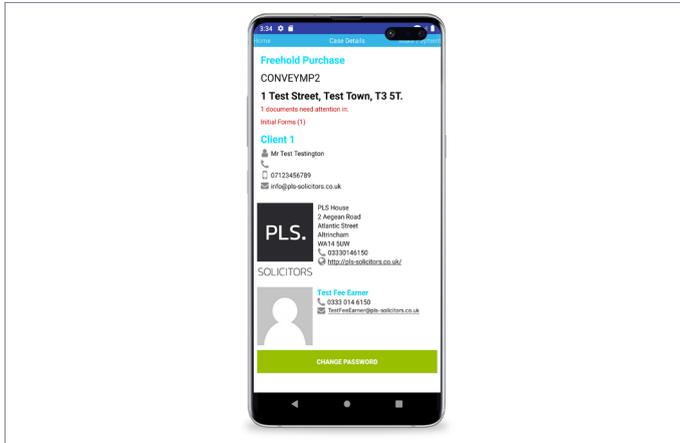
## Stage 2 - Home Screen

You will be taken to the Home Screen for your case. There are a number of Tabs or screens (e.g. Home, Tracker, Initial Forms etc.). You can click on any of the Tabs at any time to navigate around the Portal. The Red circles with a white number are telling you there are items for you to review/action in that Tab/screen.



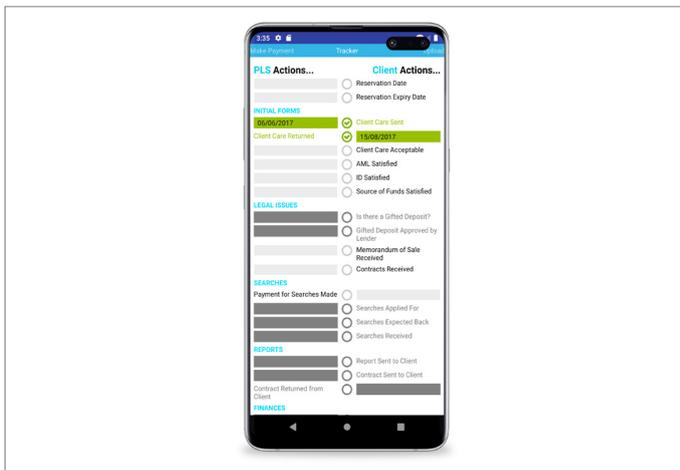
## Stage 3 - Home Screen (continued)

The Home Screen provides your Conveyancer and team direct contact details. We have also provided documents giving you some information on the Conveyancing process.



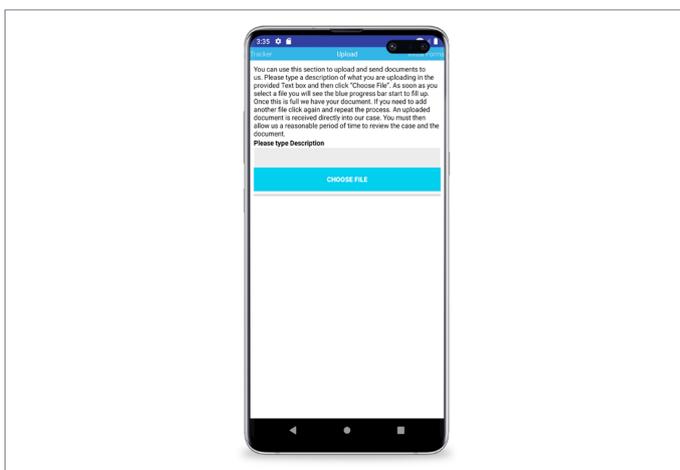
## Stage 4 - Case Details

The Case Details screen shows the property details along with the Contact details which we have for you.



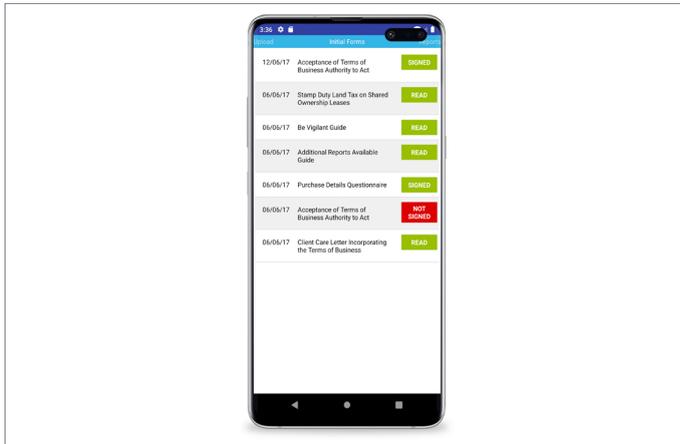
## Stage 5 - Tracker

The Tracker screen is where you can see the key milestones (or main stages) of your case. Where a date is displayed this means we have completed that milestone. The conveyancing process is not always "linear": so it is possible to complete the milestones out of sequence. All milestones need to be completed before we can complete your transaction. Some milestones are dependent on earlier milestones being hit. So, you may notice that certain milestones only become actionable (which is shown by being lit up in the Tracker) when a previous milestone has been completed. The Tracker is grouped into 2 columns: the left hand column shows actions to be performed by PLS. The right hand column shows actions to be performed by you.



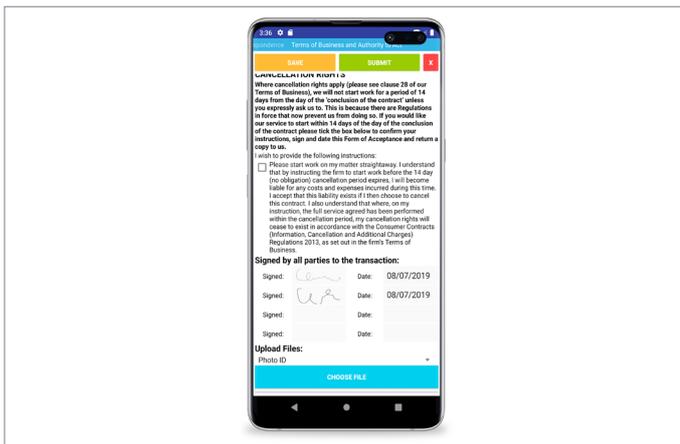
## Stage 6 - Upload and Sending Documents to PLS

The Upload screen allows you to send images or documents directly to your case on our system. To upload a document press the blue "+" button. You can then attach a document from your documents or desktop or your device storage e.g. if you are using a Phone or Tablet you can take an image directly from the Camera. Please type a description of what you are uploading in the provided Text box and then click "Choose File". As soon as you select a file you will see the blue progress bar start to fill up. Once this is full we have your document. If you need to add another file simply click the Blue "+" again and repeat the process. An uploaded document is received directly into our case. You must then allow us a reasonable period of time to review the case and the document.



## Stage 7 - Initial Forms, Reports, Searches, Mortgages/Finances, Other Correspondence

Initial Forms, Reports, Searches, Mortgages/Finances, Other Correspondence shows the various documents passing to/from us placed into their various categories. You can see what needs attention as it is marked in Red if it needs to be Read and/or Signed. You must read, complete and/or sign all documents as indicated in red. Below shows that the Sales Questionnaire needs to be completed and signed by you. Simply clicking on it and you will be taken to the document to action. The documents are grouped into different categories which we think help separate out the different issues of your case. Documents appear in chronological order with the newest at the bottom of the screen.



## Stage 8 - Signing a Document

Before submitting a document you must sign it electronically. To add your Signature click into the provided box and you will be presented with a Signature box. Draw your Signature and click OK. Whilst this may not match your usual paper signature by signing the document and submitting it to us you are confirming that the content of the document is true, accurate and comprehensive. Therefore you must not submit any document to us if you do not fully agree with its content. Once signed you will see your signature dropped into the Signature box and the document is date stamped.