



The PLS Portal 24/7 allows our buyer and seller clients to review and action their case on line. All they need is access to the Internet, through a PC, laptop, Phone, or Tablet. The Portal enables:

- PLS to send documents, emails and letters securely
- Clients can contact us quickly online
- Clients to complete, sign electronically and return documents to PLS
- Clients to track the progress of their case



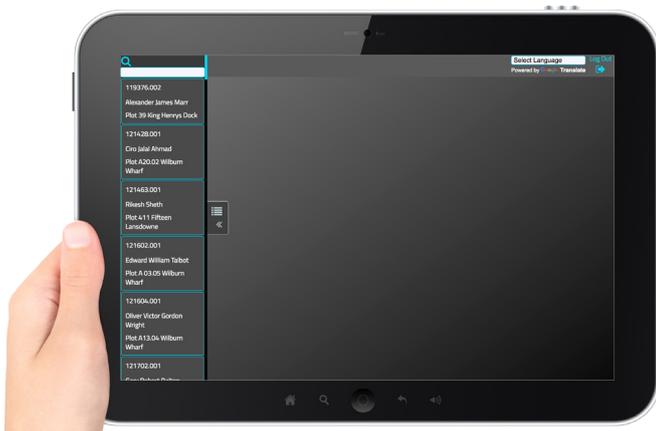
As our work referrer or introducer, you too can have access to your cases. You won't be able to view every document that our clients see. But you'll be able to see some of the document history and to view the case tracker in order to know where each of your cases is up to.

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. All you need is access to the Internet, through a PC, laptop, Phone, or Tablet.

Stage 1 - Logging In

You will have received a Login Username and Password in a separate email. Click on the link to access the PLS Portal 24/7 and type the Login Username and Password into the provided fields. (If you haven't received an email from us with your Login details please call us).

NB our clients will have different log in details which will give them a different view of the PLS Portal 24/7 and will allow them to review, action, complete and electronically sign documents securely on line.



Stage 2 - Finding a Case

You will be presented with a list of all your current live cases with us. You can also search for cases by typing a client name, address, case reference in the search field in the top left corner.

Stage 3 - Home Screen

When you have found the case you are looking for Click onto it and the case will load up. Once loaded you will see the Home screen for that case. The Home screen provides the Conveyancer and Team direct contact details. We have also added documents giving some information on the Conveyancing process.

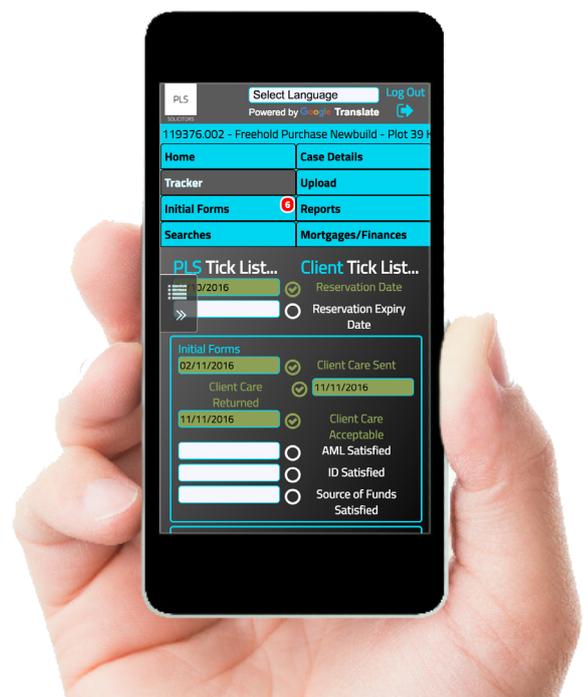


Stage 4 - Case Details

The Case Details screen shows the case type and property address and the names and contact details for all clients associated with the case.

Stage 5 - Tracker

The Tracker screen is where you can see the key milestones (or main stages) of the 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 the 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 our client.



Stage 6 - Uploading and Sending Documents to PLS

You may wish to send documents to us through the Portal. The Upload screen is the place to do that. To upload a document press the blue "+" button. You can then attach a document from your own device storage (documents library, desktop, photos). 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.

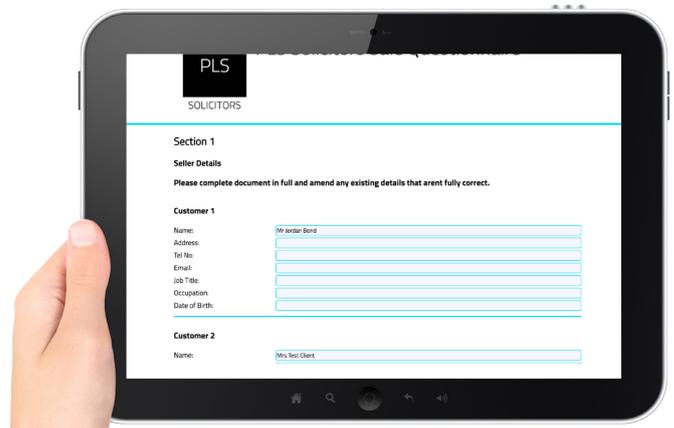
An uploaded document is received directly into our case. You must then allow us a reasonable period of time to review the case and the document.



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

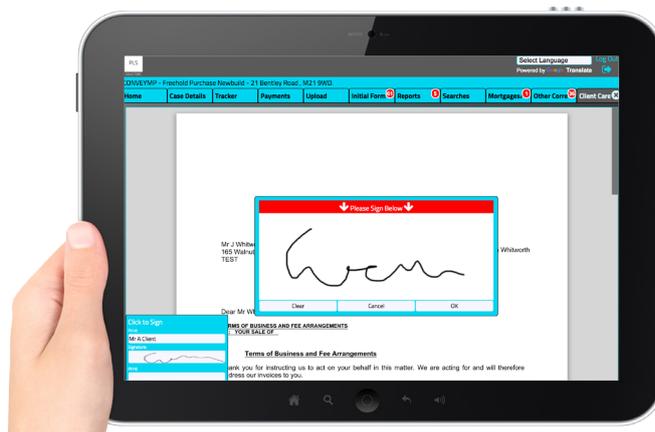
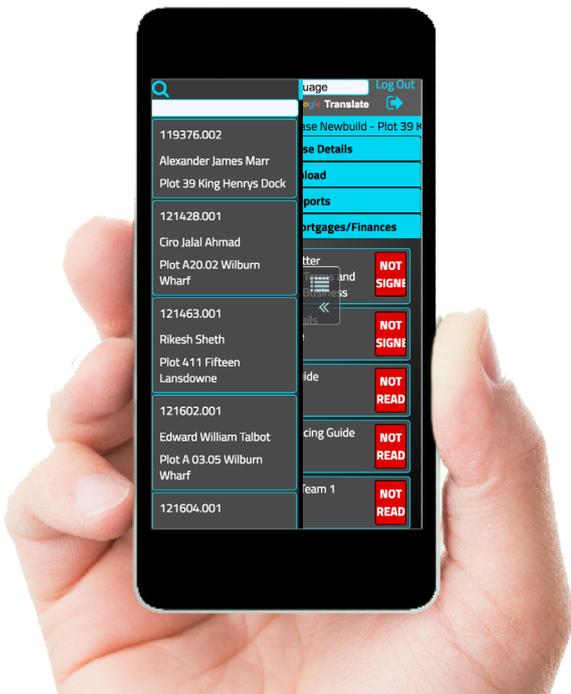
The next 5 screens (Initial Forms, Reports, Searches, Mortgages/Finances, Other Correspondence) show the various documents passing to and from us and our clients. You can see what needs attention as it is marked in red if it needs to be Read and/or Signed. Our clients must read, complete and/or sign all documents as indicated in red. They will be able to do this simply by clicking on the document name and they will be taken to the document to action.

The documents are grouped into different the above 5 categories, as we think this helps separate out the different issues of the case. Documents appear in chronological order in each category with the newest at the bottom of the screen.



Stage 8 - Documents

Our clients can click on any documents to review, action, complete and/or electronically sign them on line.



Stage 9 - Exiting a Case

When you are ready to look at your next case, Click the list icon on the left to slide out your Case list again. You can then select another Case.

If you have any questions just ask the Conveyancer dealing with your case.



PLS

SOLICITORS

CONVEYANCING
ASSOCIATION



Manchester Office:

PLS House
2 Aegean Road
Altrincham
WA14 5UW

London Office

41 Lothbury
London
EC2R 7HG

T: 0333 014 6150

E: info@pls-solicitors.co.uk

W: www.pls-solicitors.co.uk