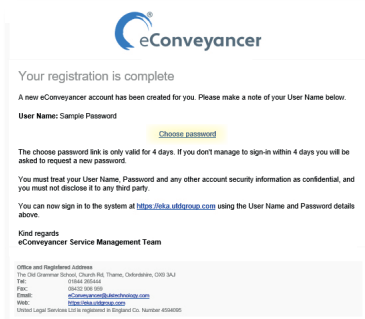


Step by Step Guide

1

Setting up your account

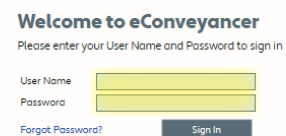


You will receive an email link as above, from your sales representative.

Click '**Choose password**'
Once created, you will receive an email saying your password has been set.

2

Login Screen



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.

You can now log onto the system by clicking **<https://eka.utdgroup.com/>**
Enter your User Name and Password details onto the log on screen.

3

New Quote Tab



If you hover over the '**New Quote**' tab, you will see a drop down of all the different quotes you can access on the eConveyancer system.

- Buy a House
- Buy and Sell a House
- Sell a House
- Buy to Let Purchase
- Limited Company BTL Purchase
- Let to Buy
- Transfer of Equity
- Remortgage
- Cashback Remortgage
- Limited Company BTL Remortgage
- Fixed Fee Remortgage
- Will
- Survey



4

New Quote Tab

Just Move In
Free Home Setup Service from Just Move In
Just Move In can help your customer with setting up or switching suppliers for council tax, water, sewerage, energy, broadband, media, removals, storage and other home related services, during their conveyancing journey.
☐ I, the [Introducer] confirm that the named party to this transaction, consent to Just Move In contacting them to offer assistance with setting up council tax, water, sewerage, energy, broadband, removals, storage and other home related services, during their conveyancing journey.

The quote screen will look the same across all case types, **relevant** questions are asked based on the case type.

Select a language preference if your clients would prefer communication in a language other than english.

When quoting for England you **DO NOT** need to enter an address, you can proceed leaving this blank.

You **MUST** enter a postcode for Wales, otherwise it will pull through the incorrect stamp duty.

You do NOT need to select a lender on any case types except cashback remortgages.

N.B. Adding in a lender will pull through the solicitors on that lenders panel.

You can select this to allow JMI to contact your clients to assist them in switching their suppliers.

5

Quoting and the DigitalMove pop up screen

What is DigitalMove?
DigitalMove is a free web app designed to improve the customer's experience. It works equally well on tablet, mobile or desktop.
The Conveyancing Starter Pack is available instantly upon instruction, so that they can begin completing the conveyancing forms straight away.
Other features include document upload, messaging, progress updates plus lots more helpful information.
Benefits of using DigitalMove
1. Speeds up conveyancing by putting the customer in control.
2. Guides the customer through the process in very simple steps.
3. Enables the customer to communicate with their conveyancer quickly and efficiently.
IMPORTANT NOTICE
DigitalMove relies on the customer completing their conveyancing forms online. If your customer would prefer to receive their Starter Pack in the post, you have the option to opt out before you instruct.
Continue - do not display this message again

After the client details have been entered press '**View Quotes**'.

A **DigitalMove** pop up will appear explaining the benefits of using this. Click '**Continue**'.

(This is optional)

6

Quoting

| Service Provider | Distance | Rating | Price | Total |
|-----------------------|-------------|--------|----------|----------|
| Solicitor Sample Name | 143.0 miles | 94% | £800.40 | £4444.00 |
| Solicitor Sample Name | 40.0 miles | 88% | £834.40 | £4444.00 |
| Solicitor Sample Name | 124.7 miles | - | £878.40 | £4444.00 |
| Solicitor Sample Name | 87.4 miles | 92% | £994.40 | £4444.00 |
| Solicitor Sample Name | 125.2 miles | 85% | £928.40 | £4444.00 |
| Solicitor Sample Name | 122.4 miles | 94% | £944.40 | £4300.00 |
| Solicitor Sample Name | 142.4 miles | 85% | £968.40 | £4444.00 |
| Solicitor Sample Name | 40.5 miles | 88% | £1004.40 | £4300.00 |
| Solicitor Sample Name | 14.1 miles | 82% | £1044.40 | £4300.00 |
| Solicitor Sample Name | 19.3 miles | 84% | £1142.40 | £4200.00 |
| Solicitor Sample Name | 72.9 miles | 85% | £1274.40 | £4300.00 |
| Solicitor Sample Name | 19.3 miles | - | £1358.40 | £4500.00 |
| Solicitor Sample Name | 38.8 miles | 94% | £1478.40 | £4500.00 |

The screen now shows a full selection of solicitors that are not ON HOLD at the time the information has been entered.

Use the '**Sort by**' option to rearrange quotes based on Rating, Distance, Price and A-Z.

Click '**Change Quote Criteria**' to edit the information entered.



Quoting

Select your chosen solicitor firm, you will then see the screen shot opposite which shows you the quote.

You can **PDF**, **PRINT** and **EMAIL** the quote by selecting one of the icons here.

Quoting

Click the **'Calculator'** icon to adjust COMMISSION.

You will see a Commission pop up appear where you can edit the details.

If you are happy with the quote press the **'Instruct Now'** button.

Confirm Customer Details

Once you have clicked the instruct now button you will see the '**Confirm Client Details**' screen.

N.B. You will need to enter D.O.B. for Limited Company Buy to Let.

Click **'Next'**.



10

Confirm Conveyancing Quote

After you have clicked Next, you will see the **Confirm Conveyancing Quote** screen.

For Purchase and Remortgage, confirm the address.

If no address is available, select 'purchase address is not known'.

Click 'Next'.

11

Confirm Instruction

The DigitalMove tick box can be unchecked if a client chooses not to have a digital experience but would rather receive their documents through the post.

Please provide any notes that you deem important for the solicitor to be made aware of.

After you have clicked Next, you will see the **Confirm Instruction** screen.

Make sure you select the tick box at the bottom.

Then click 'Instruct'.

