

# Note Sheets - Module 6

## How Do I Invite A Guest To View The Chain?



Enter your notes here

Free2Convey - buying and selling properties

Your chains

Search your chains

To perform a partial search please enter an asterisk (\*) either at the start, end or both at the start and end of your search criteria.

Chain description	Client name	Client no/ref	Fee earner	Action
Purchase of 1 High Street	Richard Wood	W00123	Christopher Leek	Select

Chain details - Purchase of 1 High Street

Invite guest | Remove my firm | Remove firm above

Contract negotiations

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You may also wish to invite your client or any associated parties to view the chain. To do so, select the 'Invite Guest' button.

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Purchase of 1 High Street	Richard Wood	W00123	Christopher Leek	Select

Chain details - Purchase of 1 High Street

Invite guest | Remove my firm | Remove firm above

Invite guest dialog box:

Title: Mr

First name: [ ]

Last name: [ ]

E-mail: [ ]

Mobile no: [ ]

Phone no: [ ]

Fax no: [ ]

Invite | Cancel

You may then enter the details of the guest you wish to invite.

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Chain description	Client name	Client no/ref	Fee earner	Action
Purchase of 1 High Street	Richard Wood	W00123	Christopher Leek	Select

Chain details - Purchase of 1 High Street

Invite guest | Remove my firm | Remove firm above

Invite guest dialog box:

Title: Mr

First name: Richard

Last name: Wood

E-mail: f2cuser2@outlook.com

Mobile no: [ ]

Phone no: 03300604940

Fax no: [ ]

Invite | Cancel

Click 'Invite' to send them an email, giving them a username and temporary password. They will also receive a second email informing them of the Chain Description to which they have been invited to view.

Free2convey guest invitation for a chain

no-reply@free2convey.co.uk (no-reply@free2convey.co.uk) Add to contacts 11:57

To: f2cuser2@outlook.com

Dear Mr Richard Wood

You have been invited as a guest to chain **Purchase of 1 High Street**.

Contact us for more information

Thank you,  
Free2Convey Team

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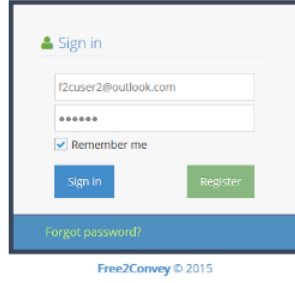
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Enter your notes here



The credentials in the email can be used to log into <http://portal.free2convey.co.uk>

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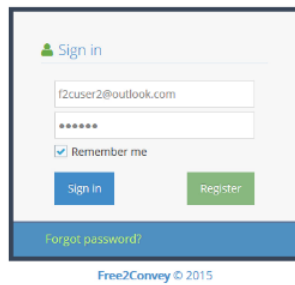
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Please note that Guests will have 'View Only' access to the chain to which they have been invited.

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