

How to....

Integrate Free2Convey within Osprey

Within OspreyTM it is possible to integrate with Free2Convey. Integration will enable users to have complete management of conveyancing chains, all within OspreyTM.

There is the ability to map existing OspreyTM dossier data into free2Convey and the ability to utilise details held within Contacts and Organisations. Users with Free2convey accounts can create matters with an option to automatically create a new chain within Free2Convey and add to an existing chain, there is also the ability to invite other parties to join Free2Convey for the purpose of updating and viewing chains.

For matters that have already been created but not added to Free2Convey, there is a batch facility which will allow for bulk entry of matters into Free2Convey.

Set Up Required

Users wanting to access Free2Convey through OspreyTM must already have an account with Free2Convey, this information needs to be entered against the relevant users OspreyTM account, changes will also need to be made to a user's access template. *(If your company and users has not yet registered, please navigate to <https://www.free2convey.co.uk>).*

It will be necessary to have specific dossier fields created so that details can be input relating to the property being purchased or sold. These fields will need to be added to a matter extension, this is added to a matter details screen to ensure that all required details are completed in order to create a chain within Free2Convey. Dossier data is mapped to a relevant sale and purchase worktype, without this mapping, users will be unable to create a chain within Free2convey.

Changing a User Details to add Free2Convey Credentials

Navigate to:

Supervisor
System Setup
Users

Select the relevant user name and then select **'Edit'**

At the bottom of the screen there is a heading '**Free2Convey Account**'

Enter in the user's registered Free2Convey email address and the password.

Select '**Save**'

Changing an Access Template

To allow access to Free2Convey within OspreyTM and also the Batch facility option which is available within Smart Actions, a user must have the relevant access template options enabled.

Navigate to:

Supervisor
System Setup
Users
Access Templates

You can either create a new template if preferred or amend an existing one.

To amend an existing template, select the '**Edit**' option to the right hand side of the appropriate template name.

Select the heading of '**Case Management**'

Ensure the following options are checked and then select '**Save**'

- Free2Convey
 - Add/Join Chain
 - Chain Invitation
 - Free2Convey Error

Select the heading '**Smart Actions**'

Ensure the following options are checked and then '**Save**'

- Free2Convey Batch
 - Free2Convey Batch Log

Mapping OspreyTM data and Dossier Data

Data Requirements

When a chain is added within Free2Convey, the following data is entered:

Basic Information

Chain Description
Client Name
Client Reference
Fee Earner Name

Property Details

Building Name
Building No
Street
City
Postcode
Title Number
Tenure

When creating a new matter, the property details need to be entered at the same time, this is why a matter extension is required as you will not be able to submit the details without the correct information.

Data can be taken from any existing fields you have in Osprey. If you do not have dossier pages set up or any existing fields relating to the required information, it will be necessary for you to create them and then create an appropriate matter extension for your sale and purchase work types. *(If you need guidance with creating dossier pages and views, please refer to the relevant training courses we offer).*

You may invite a company and contact to join a chain by searching details held in existing entries within Contacts and Organisations by means of existing contact and organisation dossier fields, or, they can be invited from existing Free2Convey details. If you do not have a contacts and organisation field, you will need to ensure you create one for each, they need to be on the same dossier page. *(It may be easier to create a new dossier page entitled Free2Convey Invites rather than use existing ones, this page will just contain one contact field and one organisation field).*

Tenure is selected from a list field and you will need a dossier list field which has a list attached containing the following options:

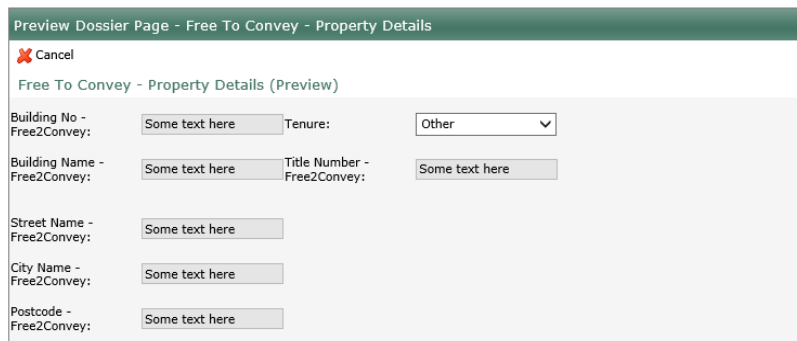
Other (**set this as the default**)

Freehold
 Leasehold
 Feuhold
 Mixed
 Unknown
 Unavailable
 Caution Against First Registration
 Rent Charge
 Franchise
 Profit A Prendre In Gross
 Manor

In respect of the Building Name or Building number, City Name and Postcode, separate freetext fields can be created for each, or, alternatively, you may use an address field. *Please note*, an OspreyTM address field has rows named **House, Area, Postal Town, County and Postcode**. If you use an address field, you may enter data in the **House** area which will merge data through into Free2Convey for either Building name or number only, **Town** can be used to merge data into City and then **Postcode** will merge data into postcode.

Below are example dossier pages relating to the fields you will need:

Property Details (example only)



Preview Dossier Page - Free To Convey - Property Details

Cancel

Free To Convey - Property Details (Preview)

Building No - Free2Convey: Tenure:

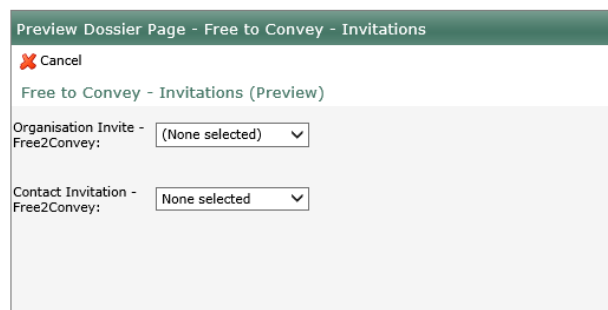
Building Name - Free2Convey: Title Number - Free2Convey:

Street Name - Free2Convey:

City Name - Free2Convey:

Postcode - Free2Convey:

Free to Convey Invitations Page (example only)



Preview Dossier Page - Free to Convey - Invitations

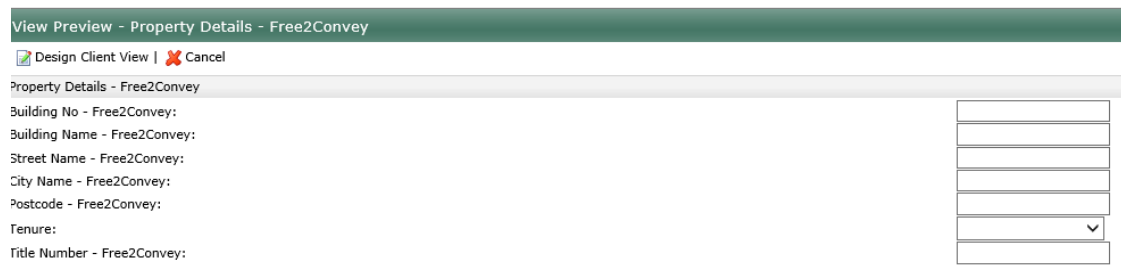
Cancel

Free to Convey - Invitations (Preview)

Organisation Invite - Free2Convey:

Contact Invitation - Free2Convey:

Below is an example matter extension. You will need to create a matter extension for both your sale and purchase work types:



The screenshot shows a web form titled "View Preview - Property Details - Free2Convey". At the top, there are links for "Design Client View" and "Cancel". Below this, the form is titled "Property Details - Free2Convey" and contains several input fields: "Building No - Free2Convey:", "Building Name - Free2Convey:", "Street Name - Free2Convey:", "City Name - Free2Convey:", "Postcode - Free2Convey:", "Tenure:" (with a dropdown arrow), and "Title Number - Free2Convey:". To the right of these labels are corresponding empty input boxes.

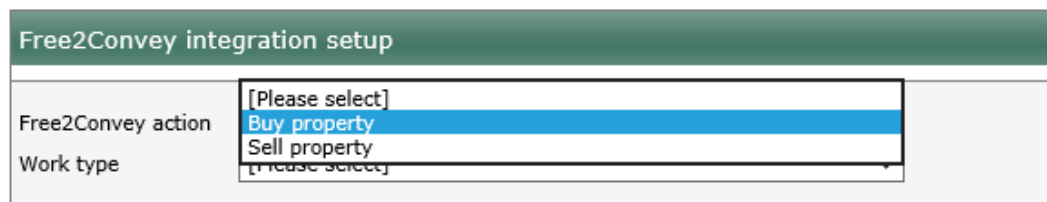
Mapping OspreyTM Data

Once you have ensured you have the relevant dossier pages, fields and matter extensions linked to your sale and purchase work types, you then need to map relevant information into Free2Convey fields.

To map fields, navigate to:

- Supervisor
- Case Management Setup
- Select 'Free2Convey'

Once you have selected 'Free2Convey', the following screen is displayed. You will need to map details for both the option of 'Buy Property' and also 'Sell Property'.

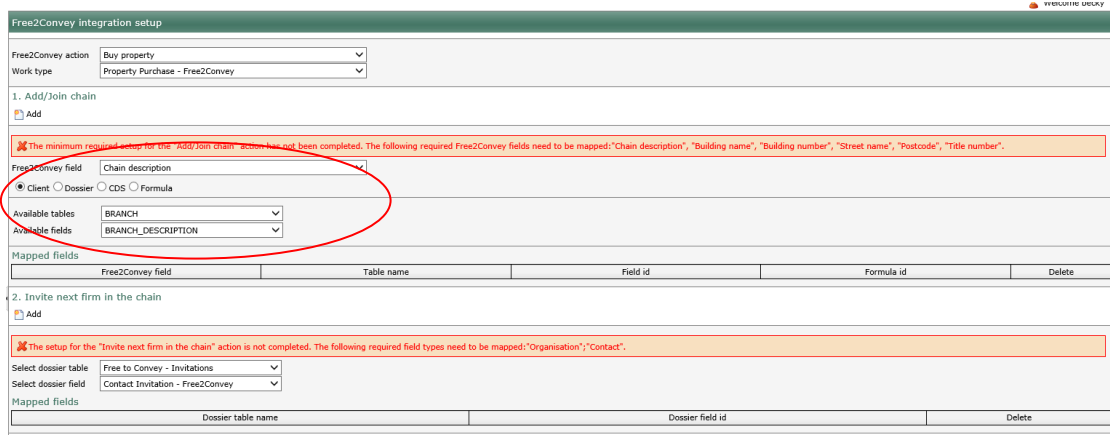


The screenshot shows a form titled "Free2Convey integration setup". It has two rows of labels: "Free2Convey action" and "Work type". To the right of these labels is a dropdown menu. The dropdown menu is open, showing four options: "[Please select]", "Buy property" (highlighted in blue), "Sell property", and "[Please select]".

Select '**Buy Property**' to start and then link to the relevant work type for Purchases.

****This part is important as Free2Convey options will not be available without completion of this stage****

The following mapping screen is displayed.



1. Add/Join Chain

From within the first section, **1. Add/Join Chain**, click the list labelled 'Free2Convey' fields, select each Free2Convey field in turn then map to the relevant area and field found within Osprey. Areas included to choose fields from are 'Client', 'Dossier', 'CDS' and 'Formula', (*in this instance, you will only ever need to select from either 'Client' or 'Dossier'*), then select save.

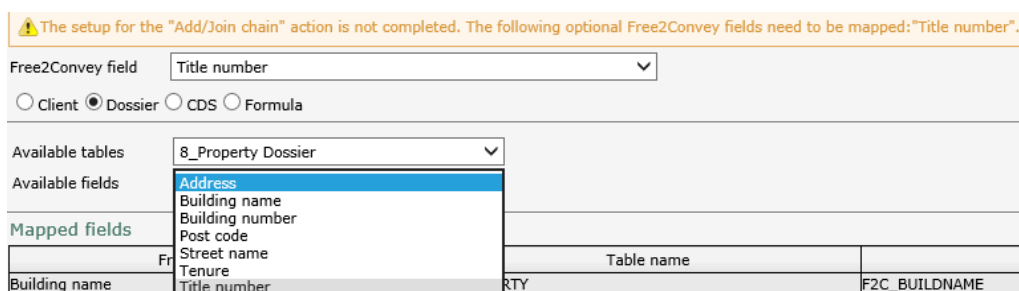
In the example below, the 'title number' is being mapped. In this instance, the title number is a field on an available dossier page named 8_Property Details.

To Map:

Select **'Title number'** from the Free2Convey Field.

Select the button labelled **'Dossier'**


Under available tables, select firstly, the correct dossier page name and then a field that best matches the Free2Convey field.



Free2Convey field	Table name	Field id	Formula id	Delete
Title number	8_Property Dossier	RTY		

Select **'Add'** to complete the mapping.

1. Add/Join chain

 Add

✓ The setup for the "Add/Join chain" action is completed.

Free2Convey field

Client Dossier CDS Formula


Available tables

Repeat for all other required fields until a message appears stating 'The setup for the 'Add/Join chain' action is completed'. (a warning appears above the mapping if all required fields have not been mapped and will prompt you which areas still need to be mapped)

2. Invite Next firm in the chain

The next section enables you to link an organisation and appropriate contact field for the purpose of sending an invitation to join a chain.

2. Invite next firm in the chain

 Add

✓ The setup for the "Invite next firm in the chain" action is completed.

Select dossier table

Select dossier field

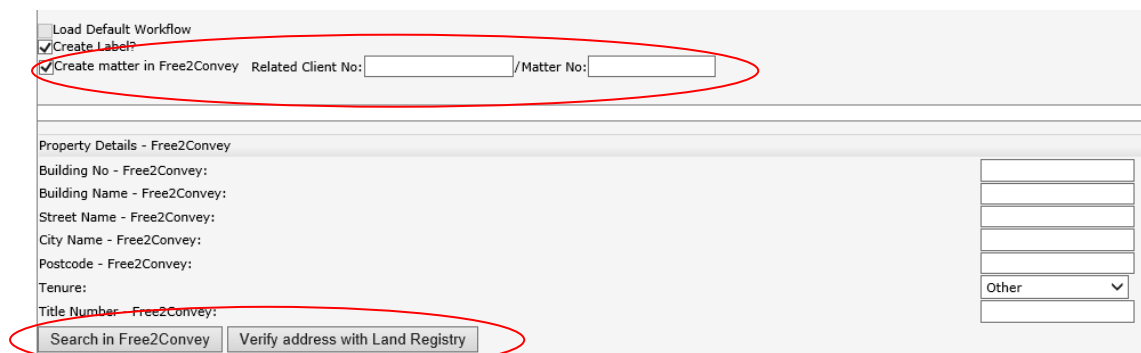
From the dossier table, select the dossier page name where your organisation is linked to and then select 'add'. Repeat for a Contact field.

All set up is now complete.

Creating Matters and linking to Free2Convey

Once all set up is complete, relevant users will now be able to create matters and then create as a chain Free2Convey if required.

Matters are created in the exact same manner as usual, however, providing that the correct work type has been selected, additional details, as shown below, will be available.



The screenshot shows a web interface with the following elements:

- Load Default Workflow
- Create Label
- Create matter in Free2Convey
- Related Client No: / Matter No:
- Property Details - Free2Convey
 - Building No - Free2Convey:
 - Building Name - Free2Convey:
 - Street Name - Free2Convey:
 - City Name - Free2Convey:
 - Postcode - Free2Convey:
 - Tenure: Other
 - Title Number - Free2Convey:
-

If these options do not appear, an incorrect work type has been selected or the mapping has not been completed.

Options that appear are as follows:

Create matter in Free2Convey

This is ticked by default, prior to saving the matter, uncheck if you do not wish to add the matter as a chain in Free2convey.

Related Client No/Matter No

Only applicable if an existing client has an associated Purchase or Sale matter and you wish to link them (*combined sale and purchase matters are explained later*)

Search in Free2Convey

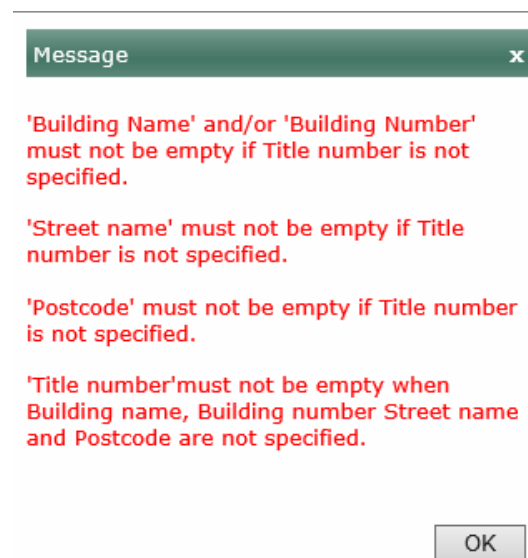
Select this once all details are completed, a check is then performed to see if the property

already exists in Free2Convey. *(If it exists, a prompt will ask you if you wish to join the existing chain)*

Verify address with Land Registry Select to check the property. If the property is found, the rest of the address detail will auto populate for you.

Enter in all suitable details and then select 'Save'.

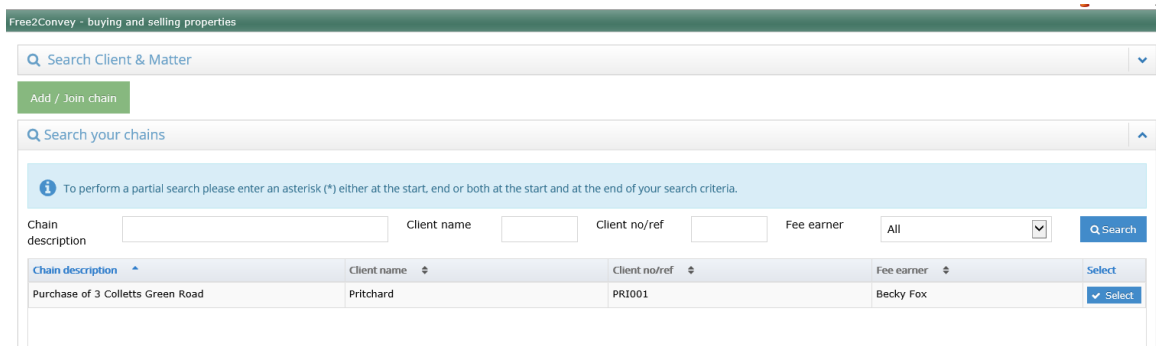
If data is incomplete, a message as shown in the example below will appear. Enter all further detail as required and then 'save' again.



If 'create matter was left checked', your matter will now have created a chain in Free2Convey.

Viewing Free2Convey Matters Via Osprey

To view matters added to Free2Convey, navigate to 'Case Management from the left hand menu within OspreyTM.



Free2Convey - buying and selling properties

Search Client & Matter

Add / Join chain

Search your chains

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

Chain description	Client name	Client no/ref	Fee earner	
Purchase of 3 Colletts Green Road	Pritchard	PR1001	Becky Fox	Select

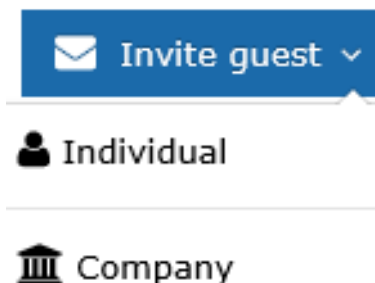
All chains will be listed.

Click '**select**' against the relevant Chain description to be able to view the Chain details. You can use the search options to search by chain description, client name etc. You can use the same wildcard search as used within the searches in Osprey.

Invite Guest

You may invite associated parties view a chain.

Select a chain to view and then select '**Invite Guest**'. You have the option to select from either Individual or Company.



Invite guest

Individual

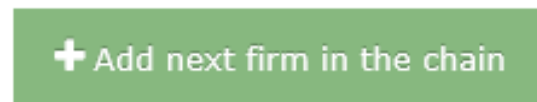
Company

You can create a brand new company and contact or individual or you can check to see if the details you require already exist within either your Osprey contacts or organisations within Free2Convey. Use the available search options to check entries. Once you have located the contact required, click 'Invite' from the bottom right of the screen.



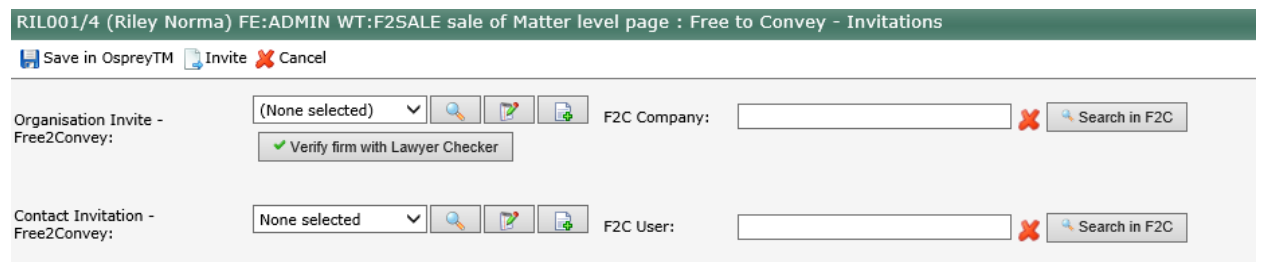
An automated email will be sent out to the invited party.

Add Next firm to a Chain



Selecting this option will take you to the relevant dossier page containing your contact and organisation fields mapped earlier within the supervisor area.

The invitation can either be sent to an existing company and contact stored within Osprey, or from within Free2Convey, alternately, a new organisation and contact can be created.



Selecting a company and contact from Free2Convey:

Selecting a Company

Select 'Search in F2C' against the F2C Company field
Select a required company using the available search options

Selecting a contact from the selected Free2Convey Company:

Select search in F2C against the F2C user's field.
Select a required contact using the available search options
(This list will only show users associated with your selected firm)

To select a Company and Contact from Osprey:

Selecting a Company

Click the drop down arrow to select from a list or use the magnifying glass to search in more detail.
Select the required Company.

To create a new Company, select the following icon and enter details accordingly.
(the contact will be populated into the field automatically).



Selecting a Contact from Osprey:

Click the drop down arrow to select from a list or use the magnifying glass to search in more detail.
Select the required contact.
(This list will only show users linked to the selected firm)

To create a new contact, select the following icon and enter details accordingly then save *(the contacts will be selected within the field automatically).*



Select 'Invite' to send your invitation.

If you check your chain within Case Management, Free2Convey, you will now notice that your chain shows the invited firm:



Buying and Selling Chains

If a client has both a sale and purchase matter, it is possible to reflect a transaction with both a sale and purchase chain.

New Clients

If you are creating a brand new client, create your client in the normal manner, however, when filling in details of the first matter, ensure that **'create matter in Free2Convey'** is unchecked.

<input type="checkbox"/> Load Default Workflow	
<input checked="" type="checkbox"/> Create Label?	
<input type="checkbox"/> Create matter in Free2Convey	Related Client No: <input type="text"/> /Matter No: <input type="text"/>

Add the second matter, this time, ensure that create matter in Free2Convey' is left checked. You will also need to enter in the details of the related Sale/Purchase by entering in the client number and related sale/purchase matter number.

<input type="checkbox"/> Load Default Workflow	
<input checked="" type="checkbox"/> Create Label?	
<input checked="" type="checkbox"/> Create matter in Free2Convey	Related Client No: <input type="text" value="STE001"/> /Matter No: <input type="text" value="2"/>

Existing Clients

Within Case Management
Free2Convey
Select



This takes you directly to the matter details page, the next matter number will automatically generate for the currently selected Osprey client, alternately, you can use the 'Search Client and Matter' option at the top of the screen, select the arrow to the right of Search Client and Matter to open the search options.

 Search Client & Matter

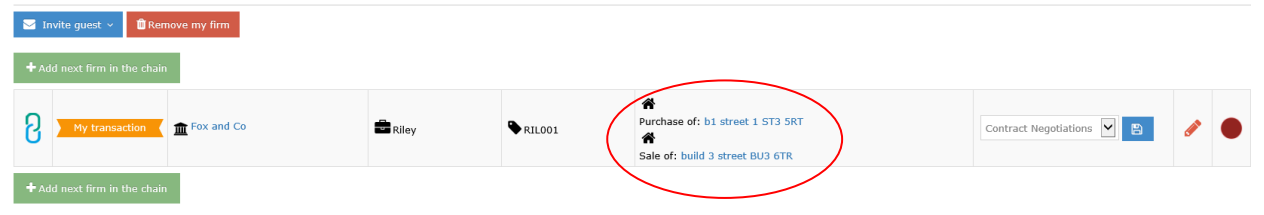
Add / Join chain

As with new clients, create the first matter, eg, the sale matter, ensuring that **‘create matter in Free2Convey’** is unchecked. Fill in the details accordingly and then save.

Create a second matter in exactly the same manner as mentioned earlier. *You can either select ‘Add/Join’ from within the Free2Convey area or you can simply just click ‘add’ within the relevant matter details screen).*

In both instances, if you now navigate to:
Case Management
Free2Convey

You will see that your transaction will appear in the chain list. Click select to view the details and you will see a combined Sale and Purchase transaction as shown in the example below:



Remove Matters

When transactions are complete or if added in error, they can be removed from Free2Convey.

Navigate to Case Management
Free2Convey

Search for the required transaction and then click ‘Select’ to view the details.

Select ‘Remove my firm’



Selecting this icon will completely remove the matter/chain from within Free2Convey.

Adding Batch matters/chains to Free2Convey

Any matters not added as a chain into Free2Convey at the point of creation, (*matters where the 'Create matter in Free2Convey', was unchecked*), can collectively have chains added into Free2convey by means of a Batch facility available within Smart Actions.

Please note, only users that have a Free2Convey account set against their user will be able to use this functionality.

To access 'Free2Convey Batch', from within the OspreyTM main menu, select:

Smart Actions
Free2Convey Batch

The screen will display any matters that have not had chains added into Free2Convey. By default, you will see purchase transactions, you can use the filter options at the top of the screen to filter by Buy and Sell properties, date opened, branch and Fee Earner.

If you use the filter options, ensure 'Search' is selected in order to refresh the results.



If necessary, all details of the transactions, other than the client and matter number, can be edited by clicking into the relevant field and overtyping the detail or making a selection from available lists. Osprey Organisations and linked contacts can be selected in relation to sending invites to view chains, or alternatively, contacts can be chosen if they exist in Free2Convey. A related sale/purchase can also be linked to a record.

#	Client No	Matter No	Building name	Building number	Street name	City name	Postcode	Title number	Tenure	Osprey organis...	Osprey contact	Free2Convey c...	Free2Convey us...	Chain status	Related Client No	Rate
1	PR0001	2		26N			T84 5VH		Freehold			Fox and Co		Contract Negotiations		
2	PR0001	4		101	Haybrook Road		W84 5TF		Leasehold					Contract Negotiations		
3	PR0001	5		2	Fleet Street		L17 8TG		Other					Contract Negotiations		
4	R3L001	5			Longbridge House		L17 8JJ		Other					Contract Negotiations		
5	R3L001	6		1	Penhaligon Way		W84 5UH		Other					Contract Negotiations		

Prior to sumitting matters as chains in Free2Convey, there are 2 check boxes that appear at the top of the screen, the options are as follows:

- Automatically Join** This is automatically enabled. When uploading the details, if the property is found in Free2Convey, the transaction will automatically be joined to the existing chain.
- Ignore invite when join** If Invite information is filled in (details added in organisation and contact for the organisation), the invitation will not be sent if left as checked.

Submitting matters as Chains

Matters can either be selected individually or in bulk.

Submitting individual entries

Right click an entry, the following options will appear.

Run
Verify record
Verify property with Land Registry
Search property on Free2Convey
Edit Osprey organisation
Edit Osprey contact

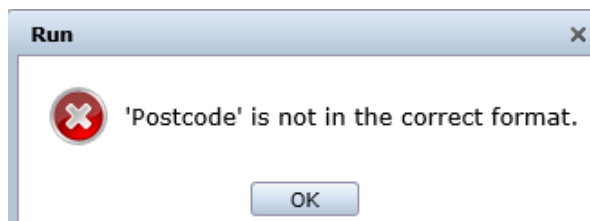
- Verify Record** Select this to check to ensure all details are correct
- Verify property with land Registry** If the property is found, all relevant property details will be pre populated
- Search Property in Free2Convey** Select to check if property already exists in Free2Convey
- Edit Osprey Organisation** If an organisation has been added to a record, select this option to amend the details

Edit Osprey contact

If a contact has been added to a record, select this option to amend the details

Select **'Run'** to submit the record as a chain in Free2Convey.

If any of the details are invalid, a message will appear on screen detailing the issues:

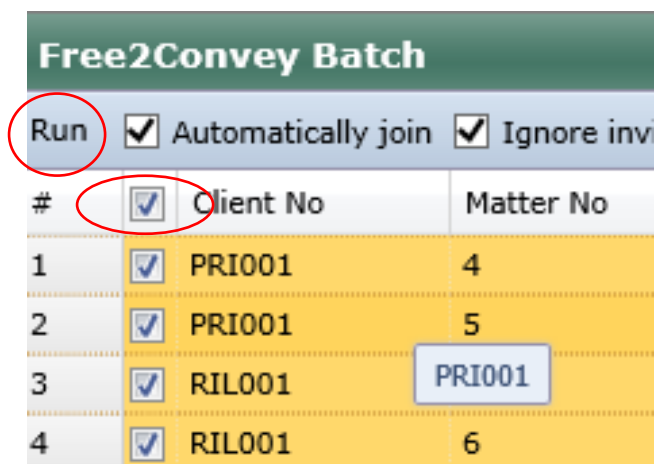


Details can be corrected accordingly, select **'Run'** again to re-submit the record.

A message will appear on screen to say **'Chain was created'**

Submitting Batch Records

To submit a batch of records, either click the check box next to each record to select individually, or, click the check box above all rows to select all:



Select **'Run'** in the top left corner to submit all records.

A log is created for all batch runs.

To view the log, select **'Free2Convey Batch log'** from the left hand menu.

All completed and failed matters will appear within the log.

Failed matters cannot be amended via the log but the record will remain within the Free2ConveyBatch area and can be amended accordingly and resubmitted.

Free2Convey Batch Log					
<input type="text"/> Search					
Client No.	<input type="text"/>	Matter No.	<input type="text"/>		
Status	Both <input type="button" value="v"/>	Create Date	<input type="text"/>	<input type="button" value="X"/>	
Description	<input type="text"/>				
1					
Client No.	Matter No.	Status	Create Date	Create By	Description
RIL001	2	Error	09/06/2016 12:09:07	becky	"Postcode" is not in the correct format.
PRI001	9	Error	09/06/2016 12:09:07	becky	"Street name" must not be empty if Title number is not specified.
RIL001	6	Success	09/06/2016 12:05:19	becky	The chain has been saved with success.
RIL001	5	Success	09/06/2016 12:05:19	becky	The chain has been saved with success.
PRI001	4	Success	09/06/2016 12:05:18	becky	The chain has been saved with success.
1					