

How to...

Use the Free2Convey SmartClient

Issue

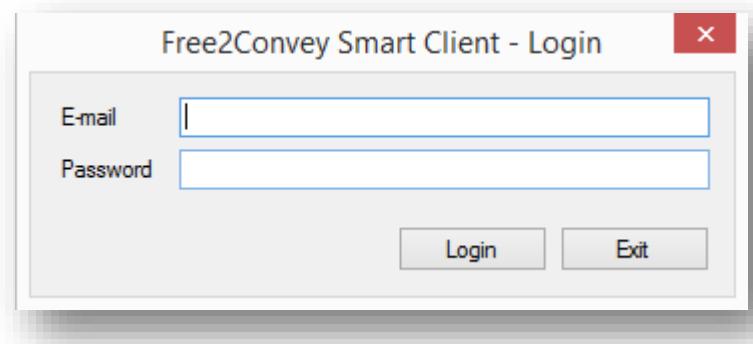
You would like to upload your Sales and Purchases directly to Free2Convey but you are not an OspreyTM customer.

The Free2Convey SmartClient allows you to upload your chains directly into Free2Convey.

Firstly, you will need to download and install the Smart Client from:

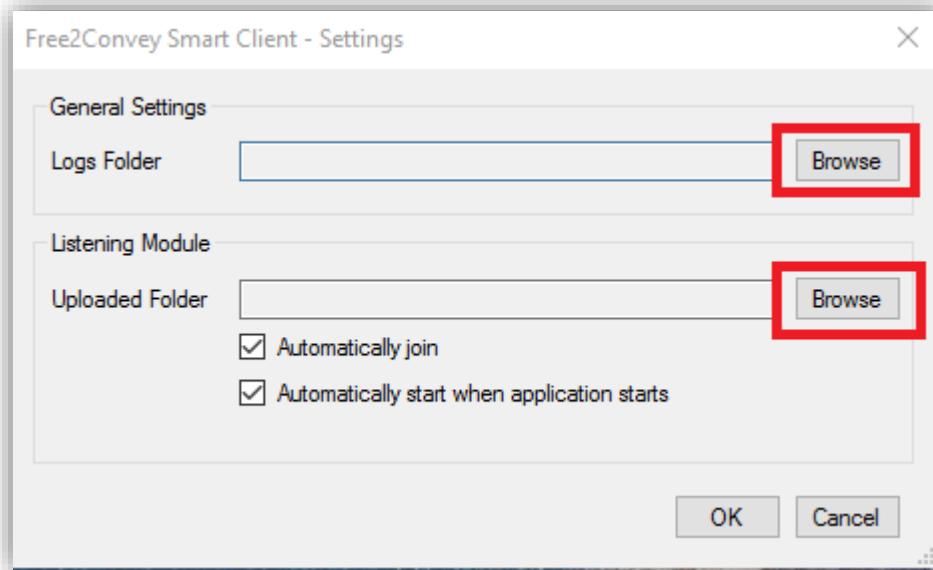
<http://deploy.free2convey.co.uk/products/smartclient/setup.exe>

Once installed, you will be presented with a login screen. Enter the user credentials you use to log into <https://free2convey.co.uk>:



If the wrong credentials are entered, an error message will be displayed to inform you that you have entered invalid credentials. If you cannot remember your password, you will need to access <https://free2convey.co.uk> and reset the password. This option can be found in the login section.

Choose 'Login' to log into the Smart Client. You will be prompted to choose a Logs folder and an Uploads Folder:



The **Logs Folder** contains the audit logs for the Smart Client (e.g. for uploads of Purchases and Sales).

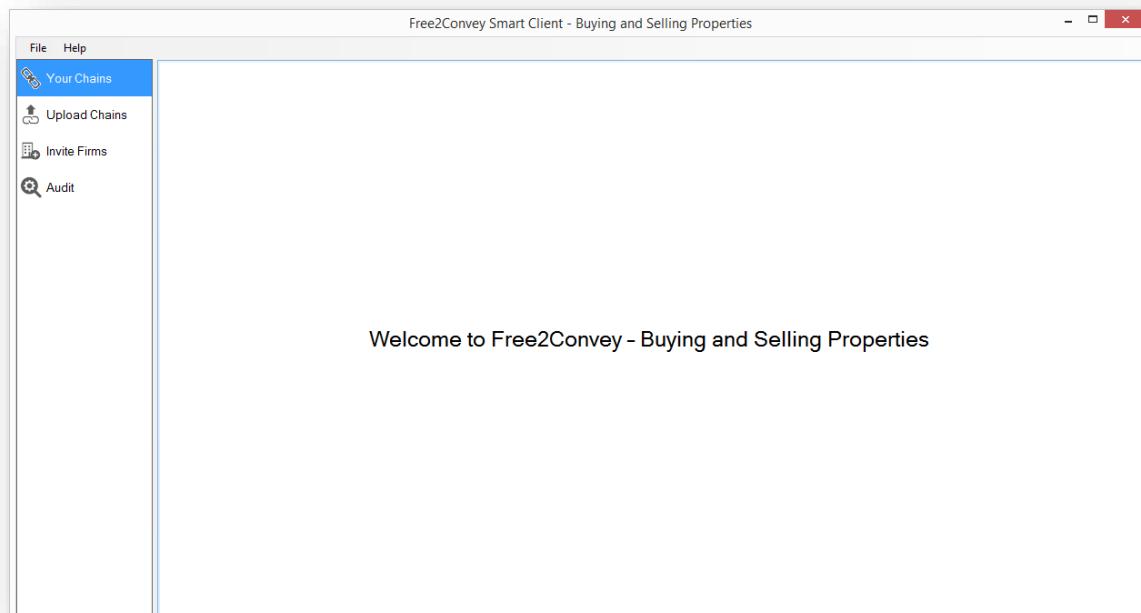
The **Uploaded Folder** is where the Smart Client will automatically check for new files to upload to the Free2Convey site using the “Listener Module”. These files will need to be saved in CSV format using our predefined template. This template is available to download from the Smart Client itself.

There are also two additional options available underneath the Uploaded Folder:

Automatically Join: Ticking this option will automatically join all chains where a join is possible; unticking this option means that no join is made and all entries where a join is found will be rejected by the application and no Free2Convey chain will be created.

Automatically Start When Application Starts: If this option is ticked, the Listener Module will automatically start and wait for files to process. Unticking the option will set the Listener Module to “Not Running” when the application is started.

Once the locations have been selected, the Smart Client will open up.

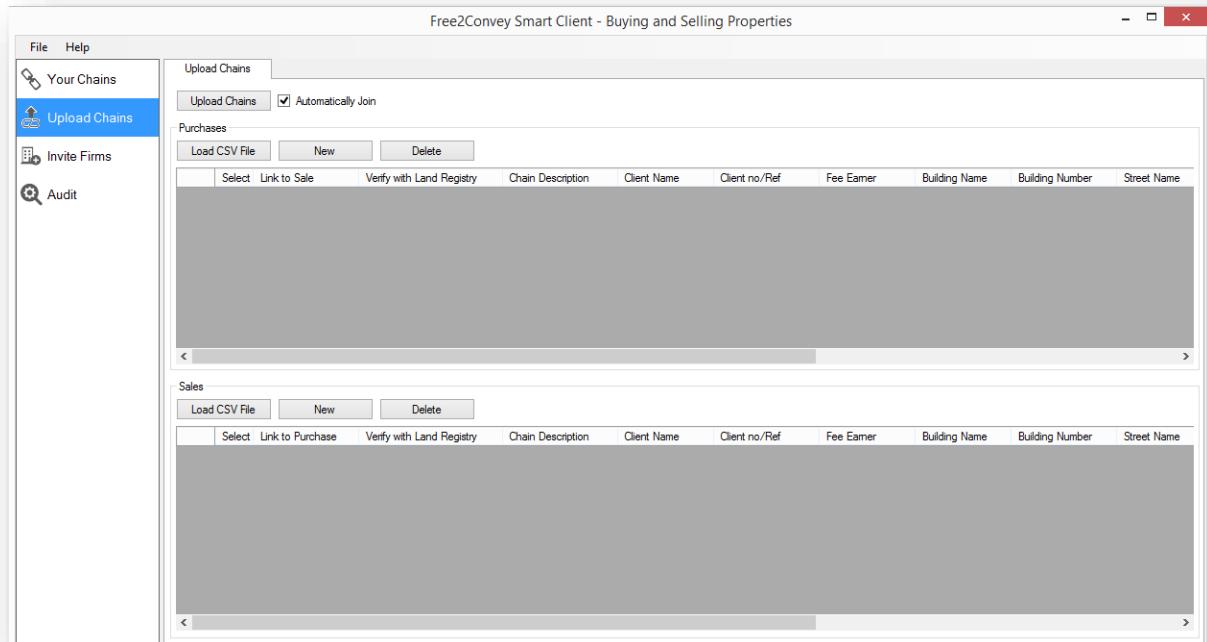


Your Chains

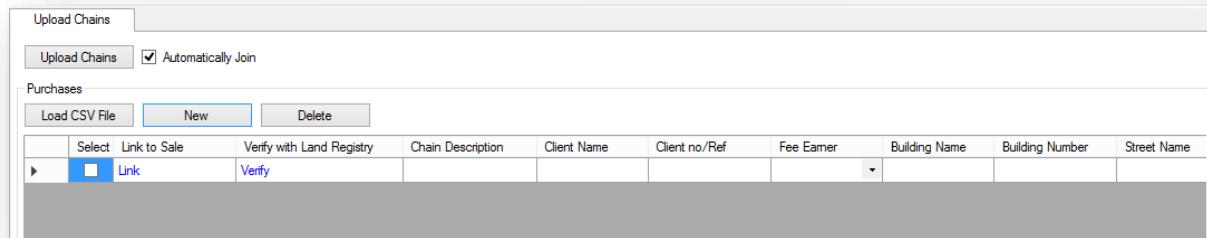
Your Chains is a link to the Free2Convey site, it automatically logs in with the credentials previously entered to log into the application and directs you to the Your Chains page.

Uploading Chains

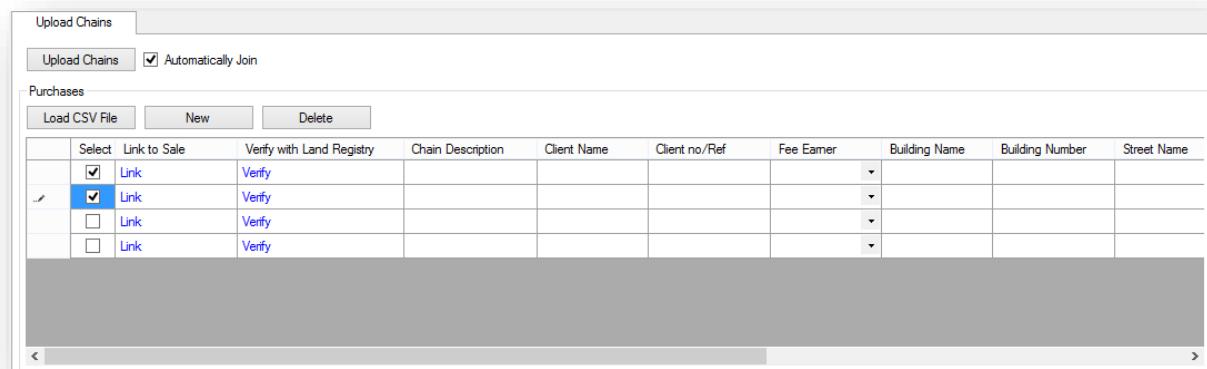
Upload Chains allows manual entry of purchases or sales. It is split into two sections, Purchases and Sales. Both of these contain the same options.



Choose 'New' to add a new line. You will then be able to enter the relevant details for this entry:



The entries of this table can be selected by choosing the 'Select' box and then clicking on the 'Delete' button. Multiple entries can be selected.



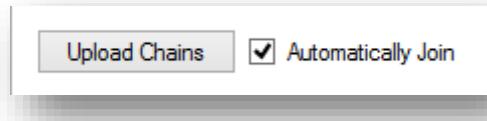
It is also possible to load CSVs into this area using the 'Load CSV File' option under the Purchases or Sales sections. As each section is destined for a different action (either Purchases or Sales), you must upload your Purchases and Sales CSV files individually.

The application will only successfully process files in the correct format. We would recommend using the ‘Upload Chains CSV Template’ for this, which can be downloaded from the ‘File’ menu. If the file uploaded does not match the correct format, you will be presented with an error message advising you of the missing or incorrect information. An error message will also appear if the file you are choosing to upload is empty or there are no property details.

When uploading a file while one or more entries are already in the table, a warning message is displayed to inform you that the existing records will be overwritten.

Each entry from the Upload Chains section can be checked with the Land Registry. For this, the user will need to have the Land Registry search active in their Free2Convey account. This can be done from the Free2Convey website, from the ‘More Actions’ menu within the Users area. If this account does not have the search enabled, an error message is displayed when attempting to verify an address.

Once you have entered all of the relevant information, you must select ‘Upload Chains’ at the top to upload them to Free2Convey.



When uploading the chains, all properties that have been verified with the Land Registry are checked in the Free2Convey database to automatically join a chain if possible.

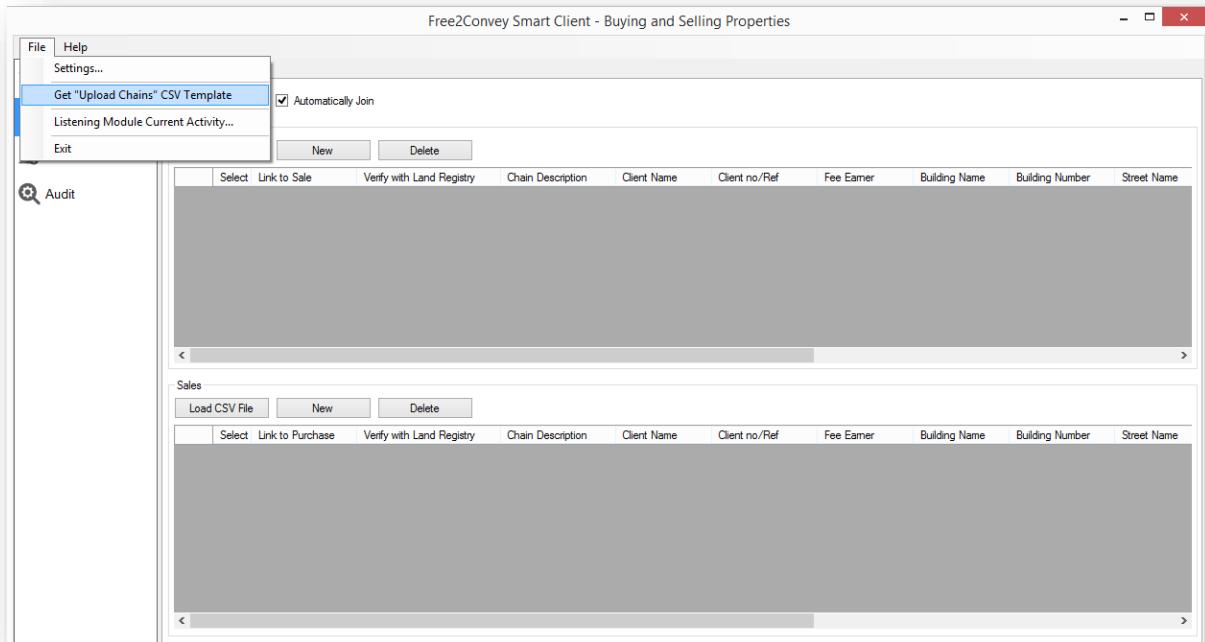
If the ‘Automatically Join’ option is unticked and a join is found, the chains will be rejected and remain in the list.

The properties that were not verified with the Land Registry, or are not available, will remain in the list.

If the validation fails for any line in the list, an error message is displayed and no other entry will be processed until the incorrect line is either corrected or removed. Any entries where the validation fails will be highlighted in red. The reason for the error can be checked by hovering the mouse over the problematic row.

Listening Module

The alternative to using the Upload Chains area is to drag and drop the upload CSV file(s) into the Uploaded Folder to allow automatic uploading into F2C using the Listening Module (which runs when the Smart Client is open). The template to do this can be downloaded by Choosing File > Get “Upload Chains” CSV Template:



This will allow you to save a copy of the template to your computer. The file can then be populated with either Purchases or Sales.

Please note the title of the file should be prefixed with either “**Purchase**” or “**Sale**” accordingly before it is dragged and dropped into the Uploaded Folder.



The first row of the file should always contain the following columns:

- Chain Description
- Client Name
- Client No/Ref
- Fee Earner
- Building Name
- Building Number
- Street Name
- City Name
- Postcode
- Status

Only one entry in either Building Name/Building Number is required. The Fee Earner and the Status should perfectly match the information available within Free2Convey. These columns are case sensitive and any difference will result in a failure to import. Chain Description and Postcode are also mandatory fields and must be completed otherwise the upload will fail.

The Fee Earner should be a Fee Earner registered with the company on Free2Convey.

The status should be set to one of the following:

- Completed
- Contract Negotiations
- Exchanged
- Ready to Complete
- Ready to Exchange
- Solicitors Not Known
- Waiting Solicitors Update Record

Once the file has been copied into the Upload Folder, the Smart Client will attempt to upload it into Free2Convey. It will automatically create either a Succeeded or Failure subfolder, further categorised into Purchases or Sales and move the file into the appropriate subfolder.

If a file fails to upload, the reason for this can be checked from the Audit section in the Smart Client.

Invite Firms

The Invite Firms area displays a list of chains where the other firm has not been invited.

The image shows the 'Invite Firms' section of the Smart Client. On the left is a sidebar with icons for 'Your Chains', 'Upload Chains', 'Invite Firms' (which is selected and highlighted in blue), and 'Audit'. The main area has three tabs at the top: 'Upload Chains', 'Audit' (disabled), and 'Invite Firms'. Below the tabs are two buttons: 'Send invites' and 'Refresh'. A table titled 'Firms to Invite' is displayed, showing two rows of data. The columns are 'Ready to Invite', 'Invite Firm Above', and 'Invite Firm Below'. The first row has 'No' in all columns. The second row has 'No' in the first column and 'Invite' in the last two columns, which are underlined.

	Ready to Invite	Invite Firm Above	Invite Firm Below
>	No		Invite
	No	Invite	

Select the 'Invite' link under either Invite Firm Above/Invite Firm Below column headings to open the Invite Form:

Free2Convey Smart Client - Invite Firm

Chain description	<input type="text"/>				
Company search - check to see if the law firm already uses Free2Convey					
Company name	<input type="text"/> <input type="button" value="Search"/>				
<input type="checkbox"/>	Name	Address	Phone no	Email address	Select
Company details					
<input type="button" value="Clear"/>					
Name	<input type="text"/>				
Address 1	<input type="text"/>	Address 2	<input type="text"/>	Address 3	<input type="text"/>
Town	<input type="text"/>				
Phone number	<input type="text"/>	County	<input type="text"/>	Post code	<input type="text"/>
Fax number	<input type="text"/>				
Email address	<input type="text"/>				
User search					
First name	<input type="text"/>	Last name	<input type="text"/>	Email	<input type="text"/> <input type="button" value="Search"/>
<input type="checkbox"/>	First name	Last name	Email address	Mobile number	Select
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

The 'Chain Description' field is a free text field, and should be populated with a chain description relevant to the firm you're inviting. For example, if your matter relates to the purchase of a property and you are inviting the firm handling the sale, you would populate the chain description field with 'Sale of...'. The chain description must be entered to make an invite.

The Company search can be made using either a full or partial search. For partial searches, a minimum of three characters is required.

Once the search has been made, the company can be selected from the results by clicking the 'Select' link.

	Name	Address	Phone no	Email address	Select
<input checked="" type="checkbox"/>					Select

Once the company has been selected, the Company Details section will be populated with non-editable fields containing the company information.

The Users section will then populate with the users registered under the selected company. A user can then be selected, which will populate the Contact Details section with non-editable fields containing contact information.

Hit 'Save' to save the selection made and return to the Invite Firms screen. The 'Ready to Invite' status will then change to 'Yes'.

Firms to Invite			
	Ready to Invite	Invite Firm Above	Invite Firm Below
	No		Invite
▶	Yes	Invite	

It is also possible to add a new company and user to be used for the invite. Open the Invite Firm window as normal. A chain description must be filled in, but do not look for a company. The Company Details section can then be manually populated. After this, the Contact Details section should be manually populated.

Once both sections have been completed with valid information, it is possible to save this and use it for the invite.

The 'Ready to Invite' status will change to 'Yes'.

After a company and contact have been selected for at least one chain, the invites can be sent. To do this, hit the 'Send invites' button.

Invite Firms			
	Ready to Invite	Invite Firm Above	Invite Firm Below
	Send invites		
			Refresh
Firms to Invite			
	Ready to Invite	Invite Firm Above	Invite Firm Below
	Yes	Invite	Invite
	Yes	Invite	
	No	Invite	

A message will then appear to say that only the chains marked as 'Ready to Invite' will be uploaded. Choose 'OK' to continue.

Any chains where a company and user were not selected will remain in the list.

If only one invite was sent for a middle link chain, it will remain in the list with the invite available on the remaining end only.

It is possible to update this list at any time by selecting the 'Refresh' button.

Audit

The Smart Client has an auditing facility built in, which can be accessed from the Audit option on the menu.

The default filter applied when accessing the Audit section is to monitor the Listening Module activity for the current date.

The screenshot shows a software interface with a sidebar on the left containing icons for 'Your Chains', 'Upload Chains', 'Invite Firms', and 'Audit'. The 'Audit' icon is selected. The main area has tabs for 'Upload Chains', 'Audit', and 'Invite Firms', with 'Audit' selected. A 'Filters' section includes dropdowns for 'Type' (set to 'Listening') and date range ('Date from' 30/05/2016, 'Date to' 06/06/2016), and buttons for 'Search' and 'Clear Filters'. Below these is a table titled 'Date' with a list of timestamped entries. The first entry is highlighted in blue: '31/05/2016 17:30'.

Date
31/05/2016 17:30
31/05/2016 17:30
31/05/2016 17:26
31/05/2016 17:26
31/05/2016 17:23
31/05/2016 17:23
31/05/2016 15:55
31/05/2016 15:34
31/05/2016 15:32
31/05/2016 15:29

It is possible to change this filter to monitor the Listening Module, Upload Chains, or Invite Firms. It is also possible to alter the date range. Choose 'Search' to apply the new filter, or 'Clear Filters' to revert to the default.

Click on any of the records in the list to display the details in the section below. The default filter applied here is Status: Failed.

It is possible to filter this section by Status (either Failed or Succeeded), Description, Chain Description, or Client Name. Choose 'Search' to apply the new filter, or 'Clear Filters' to revert to the default.

This section allows you to view the reason for Upload failure.

The screenshot shows a 'Filters' section with dropdowns for 'Status' (set to 'Failed'), 'Description' (empty), and 'Chain Description' (empty). Below this is a 'Export to CSV' button. A table follows, with columns: Status, Chain Description, Client Name, and Description. One row is highlighted in blue: 'Failed', 'Purchase of 5 Birch Lane', 'K Andrews', and 'Postcode' is not in the correct format.

Status	Chain Description	Client Name	Description
Failed	Purchase of 5 Birch Lane	K Andrews	'Postcode' is not in the correct format.