

# MoveEasier User Manual (Agents & Clients)

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## 1. Introduction

MoveEasier is our award winning Internet case notification system which allows us to keep you, and your designated agent(s), immediately informed of actions taken place in regards to your specific matter(s). For example, this will allow you to be kept up to speed on the preparation of your Home Information Pack (HIP) for a given property as well as developments in your sale. Whenever significant stages in your transaction(s) are reached both you, and your designated agent(s), will receive an email and/or SMS text message to update you regarding your transaction. This information is also available online so that you, and your designated agent(s), can log in and easily see the progress of your transaction(s). You can also print and download this information. The system also records any and all email and/or SMS text message correspondence, sent via the system, between Agents, Clients and Fee Earners, which can also be accessed online.

If you would like other parties to be added to your matter(s) so that they too are updated on a regular basis, such as a mortgage broker or financial adviser for example, then please do let a member of the department know so that we can set this up for you.

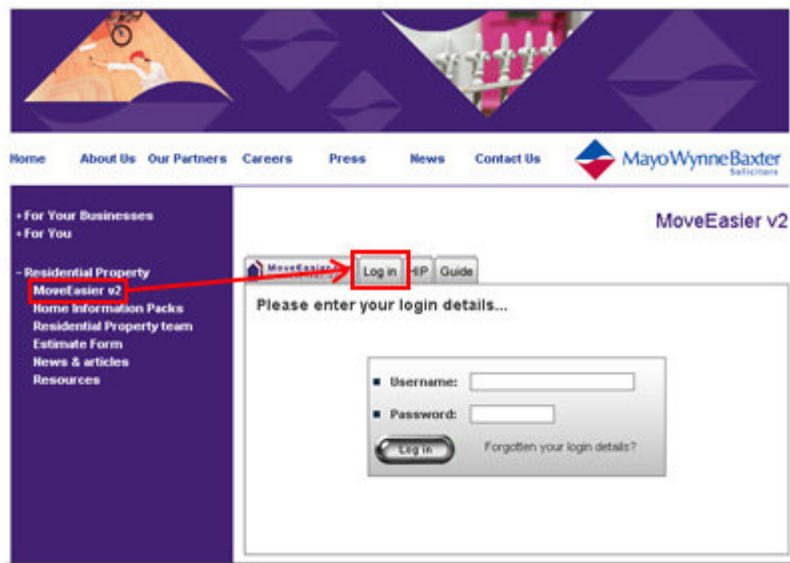
**Note:** SMS text messages sent via MoveEasier cannot be replied to since they are sent automatically by the system. The system does, however, allow Agents, Clients and Fee Earners to contact each other online.

## 2. Accessing the system

### 2.1. Logging into the system

The MoveEasier system can be accessed from the **Residential Property** section of the firm's Extranet, i.e. main website, at [www.mayowynnebaxter.co.uk](http://www.mayowynnebaxter.co.uk).

You can log into MoveEasier by selecting the **MoveEasier v2** link from the left hand menu followed by clicking on the MoveEasier **Log In tab** (see image below).



At this stage you will need to enter your **username** and **password** in order to log in. You should already have these details to hand since the system automatically emails, and/or SMS texts, your log in details to you when your account is initially setup.

If per chance you do not have your log in details to hand then you can request them by clicking on the **Forgotten your login details?** link. This will email and/or SMS text your login details to you. If this isn't an option, however, then a member of the department will be able to assist you over the phone to help get you started.

## 2.2. Home Information Pack (HIP) Direct Access

MoveEasier can also be setup so that certain worktypes can be accessed without login details i.e. **direct access**. This can be useful, for example, in the case of a HIP where by Agents may need to provide HIP access to potential buyers without allowing them access to the related transaction. In such an instance a HIP which has had direct access enabled by us will have a unique direct access code. This code can be freely given out thus allowing third parties to directly access the HIP via the **HIP tab** (see image above). Simple entering the relevant direct access code will bring up the HIP in question.

## 3. Selecting a matter and worktype

Once you have logged into MoveEasier you will be presented with the **Display Worktype** page (see image below). You can select the matter you wish to access by clicking on the **Available Matter(s)** dropdown and selecting the matter of interest. A matter is effectively a case file, or transaction, that you have in progress with the firm. You may have one or more matters with the firm.

**Note:** The Available Matter(s) dropdown only contains live matters. You will need to use **Worktype Searching** (section 5) in order to bring up archived matters. If you have no live matters with the firm then the Available Matter(s) dropdown will contain no matters.

Having selected a matter you can then select an attached worktype. A worktype is a series of stages which, when completed, equate to a meaningful task e.g. a freehold sale with a HIP. A matter can have several worktypes attached to it each of which can be displayed by clicking on their green arrow button adjacent.

**Note:** The Available Matter(s) dropdown is populated alphabetically, the first matter of which will automatically be displayed upon logging into MoveEasier. Similarly, the matter's first worktype will also be displayed by default.

Once you have selected a worktype its workflow i.e. all of its ordered stages, will be displayed. It is the workflow that is of importance since this information will detail the status of the worktype.

**Display Worktype**

Available Matter(s): ----- Click here to select an alternate matter -----  
Client-Matter Number: 102352-000003 55 Dillingburgh Road Eastbourn...  
Matter Description: 55 Dillingburgh Road Eastbourne.  
Worktype: Freehold Sale with a HIP  
Attached Worktype(s): Freehold Sale with a HIP  
Freehold HIP →

**Users**

Attached Client(s): Mr Liam Young  
Attached Agent(s): Mr David Sargant (Houses 4 U)  
Attached Fee Earning(s): Sally Dean

**Workflow**

Stage	Progress
Forms sent to client	Date: 21/07/2008 SMS: Sent Email: Sent
HIP ordered	Date: 25/07/2008 SMS: Sent Email: Sent
Forms returned by client	Date: 24/07/2008 SMS: Sent Email: Sent
Energy Performance Certificate received	Date: None SMS: Not sent Email: Not sent

#### 4. Accessing worktype messaging

Worktype messaging is used to communicate online regarding any given worktype. It can be used to communicate with any, and all, users attached to a worktype. In addition worktype messaging will retain any correspondence sent. Whilst traditional methods of communication can obviously still be used to get in touch with the firm, communications sent via worktype messaging are particularly useful since they are linked to the worktype thus it's easier for attached users to see what's going on.

You can access worktype messaging by clicking on the envelope icon at the top of the screen (see image adjacent).

Once accessed, you can use worktype messaging to contact any of the worktype's attached users.

Any correspondence will be retained in the message log.

You can return to viewing the worktype in its entirety at any time by clicking once more on the envelope icon at the top of the screen (see image below).



The small green arrow on the icon denotes that clicking on it will return you to the worktype.

**Display Worktype**

Available Matter(s): ----- Click here to select an alternate matter -----

Client-Matter Number: **102352-000003**

Matter Description: **55 Dillingburgh Road Eastbourne.**

Worktype: **Freehold Sale with a HIP**

Attached Worktype(s): **Freehold Sale with a HIP**  
**Freehold HIP** →

**Users**

Attached Client(s): **Mr Liam Young**

Attached Agent(s): **Mr David Sargant (Houses 4 U)**

Attached Fee Eamer(s): **Sally Dean**

**Messaging** Send

Available Recipients:

Recipient	User Type	Email
Liam Young	Client	<input type="checkbox"/>
David Sargant	Agent	<input type="checkbox"/>
Sally Dean	Fee Eamer	<input type="checkbox"/>

Dear <salutation> <forename> <surname>,  
**Message:**

Regards

Send

**Message Log**

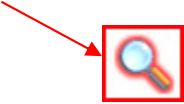
Recipient	User Type	Format	Originator	Date/Time Sent
Mr Rager Roberts	Agent	Email	System	04/08/2008 14:39
Destination	sales@ragerroberts.co.uk			
Message	Dear John Luker,			
	The following stage has just been actioned for matter 102352-000003 / Freehold Sale with a HIP: HIP available/supplied.			
	Regards MoveEasier.			

**Recipient**      **User Type**      **Format**      **Originator**      **Date/Time Sent**

## 5. Accessing worktype searching

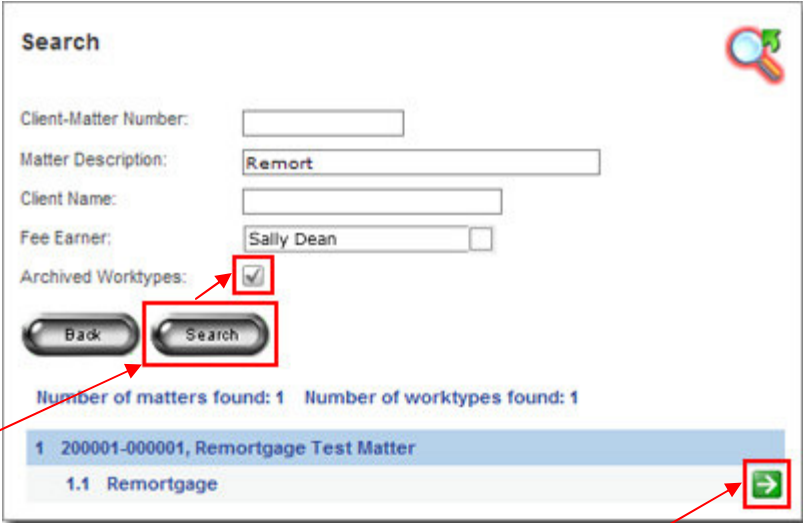
Worktype searching is used to access live or archived matters and their worktypes.

You can access worktype searching by clicking on the magnifying glass icon at the top of the screen (see image below).



Once accessed, you can use worktype searching to view any live or archived matters and/or worktypes. That said, you are only able to access worktypes which you are attached to.

To perform a search simply enter the relevant search criteria, select the archived worktypes check box to include archived worktypes in your search and then click on the search button.

A screenshot of a web application's search interface. At the top right is a magnifying glass icon. Below it are input fields for 'Client-Matter Number', 'Matter Description' (containing 'Remort'), 'Client Name', and 'Fee Earner' (containing 'Sally Dean'). There is a checked checkbox for 'Archived Worktypes'. Below these are 'Back' and 'Search' buttons. A summary line shows 'Number of matters found: 1' and 'Number of worktypes found: 1'. Below that is a list of results: '1 200001-000001, Remortgage Test Matter' and '1.1 Remortgage'. A green arrow icon is visible at the end of the second result line.

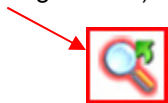
Once you have performed your search you will be able to access any worktypes found, which you are attached to, by clicking on their green arrow button adjacent.

**Note:** It is recommended that you narrow your searches by providing at least some search criteria.

This will lead to faster searches. In addition, when entering manually typed search criteria less is more.

**Example:** When searching for the matter titled **Remortgage Test Matter** (see image above) it is advised to search for the word **Remortgage**, or at least part of it e.g. **Remort**. This will reduce potential spelling errors and thus incorrect matches. That said, there is a trade off: less criteria will lead to more search results being generated. The best way to perform a search is to enter the matter's unique **Client-Matter Number** and nothing else.

You can return to display worktype at any time by clicking once more on the magnifying glass icon at the top of the screen (see image below).



## 6. Settings

Should you wish to amend any available settings then you can do so from the settings page which can be accessed by clicking on the spanner icon at the top of the screen (see image below).



At the time of writing this material, this page allows you to amend account settings only. Going forwards additional settings will no doubt be introduced as the software evolves.


If your account has been given administrator privileges then you can also manage accounts for other users in your organisation. This option is only available to administrators and is not applicable to clients.

You can return to display worktype at any time by clicking once more on the spanner icon at the top of the screen (see image below).

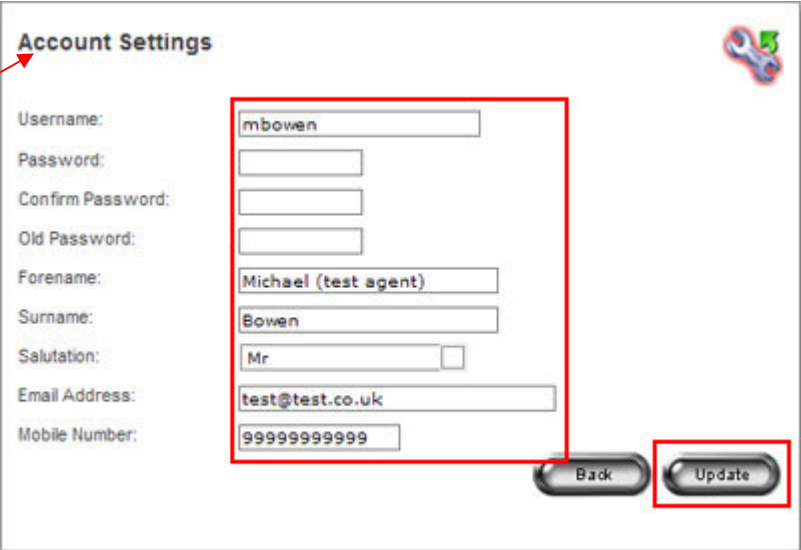
A screenshot of a web application's settings page. At the top right is a spanner icon with a green arrow. Below it are two options: 'Configure my account settings' and 'Configure other user accounts', each with a green arrow button to its right.

## 6.1 Amending your account settings

Configure my account settings is used to amend your own account settings.

Configure my account settings 

Once accessed, you can use configure my account settings to amend any of your own account settings by filling in the fields (see image adjacent) and then clicking on the update button.



**Account Settings**

Username:

Password:

Confirm Password:

Old Password:

Forename:

Surname:

Salutation:


Email Address:

Mobile Number:

**Note:** The **Email Address** and **Mobile Number** fields are not mandatory, i.e. you do not have to fill in these fields, however, omitting these details will mean that you **will not** receive email and/or SMS text messages sent via the system. It is therefore highly recommended that you enter valid details into both of these fields else you will have to log into the system regularly to keep up to date with your matter(s).

## 6.2 Managing your organisation's user accounts (agent administrators only)

Configure other user accounts is used to manage accounts for other users in your organisation.

Configure other user accounts 

Once accessed you can use configure other user accounts to perform the following account management tasks:

**New Account:** To create a new account simply fill in the fields, select the administrator check box if you wish to give the account access to configure other user accounts, and then click on the add button (see image adjacent).

### Existing Accounts:-

**Amend Account:** To amend an existing account simply click on the relevant account's forename, surname or username to bring up the account settings page for the selected account.

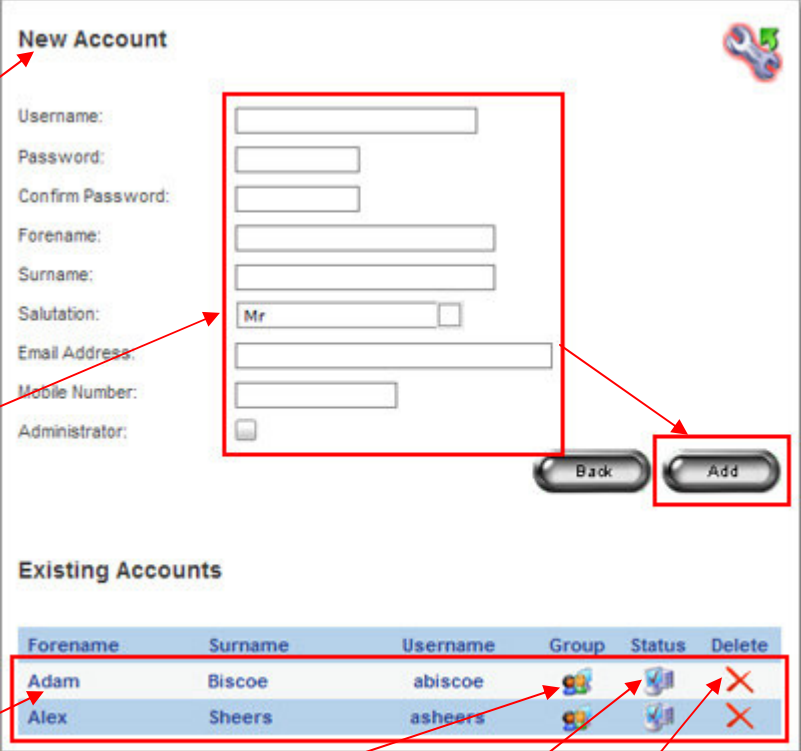
**Toggle Group:** To toggle the group for an existing account, between **User** and **Administrator**, simply click on the group icon for the relevant account.

**Toggle Status:** To toggle the status for an existing account, between **Disabled** and **Enabled**, simply click on the status icon for the relevant account.

**Note:** Disabled accounts can not be used to log in i.e. they are locked down.

**Delete Account:** To delete an existing account simply click on the delete icon for the relevant account.

**Note:** Whilst this action will bring up a confirmation dialogue box, deleting an account is ultimately **irreversible!** That said, an account can always be re-made, however, it will need re-attaching to any formerly attached worktypes.



Forename	Surname	Username	Group	Status	Delete
Adam	Biscoe	abiscoe			
Alex	Sheers	asheers			

## 7. Logging out of the system

You can log out of the system at anytime by clicking on the large green arrow icon at the top of the screen (see image below).



**Note:** The system will automatically log out any idle accounts after a period of time for security purposes.