

Preview WebTCards Standard Business Conveyancing Work Tracking System

Screen shots and how to create your own Planning System in 2 easy steps

For help with the design and set-up of your system e-mail
Support@WebTCards.com or call UK (044) (0) 7717-653177



WebTCards

Helping Business Plan, Review & Schedule

Sample Standard WebTCards Conveyancing Work Tracking System

Your Company logo here Conveyancing : Conveyancing Control System Change Pswd Support LOG OUT

Boards : Work tracker

DESIGN BOARD CREATE T-CARD BATCH CARDS FIND SUMMARISE EXPORT REFRESH LICENCE SOFTWARE

Board view, visitor 8 [Filter Board](#) [Key Indicator View](#)

| With Solicitor 6 TCards | Waiting Instruction 0 TCards | Waiting Deeds 0 TCards | Waiting Contract 1 TCards | Waiting Enquiries 0 TCards | Waiting Search 0 TCards | Waiting Mortgage Offer 0 TCards | Client Contracts 0 TCards | Ready To 0 TCards |
|--|---------------------------------|---------------------------|---|-------------------------------|----------------------------|------------------------------------|------------------------------|----------------------|
| <ul style="list-style-type: none">↕ Mrs S. Lindsay↕ KT23 4EF↕ Bell | | | <ul style="list-style-type: none">↕ Miss Harris↕ TW7 5DH↕ Daniels | | | | | |
| <ul style="list-style-type: none">↕ Mrs A. M. Graham↕ HA6 2LE↕ Daniels | | | | | | | | |
| <ul style="list-style-type: none">↕ Mrs Hardie↕ DT1 2BJ↕ Daniels | | | | | | | | |
| <ul style="list-style-type: none">↕ Mrs Toynbee↕ TQ13 9TS↕ Daniels | | | | | | | | |
| <ul style="list-style-type: none">↕ P. C. Lindsay↕ GL56 0UP↕ Gabby | | | | | | | | |
| <ul style="list-style-type: none">↕ Sir Peter Osborne↕ GL53 9Qz↕ Gabby | | | | | | | | |

Sample WebTCards Conveyancing T Card

Created By: Conveyancing on 28/10/2009 16:50

Board :

T-Card Template : All

Panel :

* Client :

* Our File Ref. :

* Agent :

Solicitors Note Pad :

Initial Letters :

Client Instructions :

Contract Received :

Deeds Received :

Contracts Sent :

Local Search Sent :

Addn. Enquiries Sent :

Addn. Enquiries Recd :

Local Search Recd :

Mortgage Offer Recd :

Replies to Addn Enqs :

[Click here to e-mail this TCard](#)

Each T Card records a Task

Step 1 Design your Board and Panels

WebTCards.com

Board and Panel Creation

Board Details (Tip : A Board normally represents a Process)

Board Name :

Board Description :

Board Colour : ... Panel Colour :

[View Audit](#)

Panels (Tip : Each Panel represents a step in the Process)

| Panel Name | Sequence | Delete |
|---|--------------------------------|----------------------------------|
| <input type="text" value="With Solicitor"/> | <input type="text" value="1"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Instruction"/> | <input type="text" value="2"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Deeds"/> | <input type="text" value="3"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Contract"/> | <input type="text" value="4"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Enquiries"/> | <input type="text" value="5"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Search"/> | <input type="text" value="6"/> | <input type="button" value="X"/> |
| <input type="text" value="Waiting Mortgage Offer"/> | <input type="text" value="7"/> | <input type="button" value="X"/> |
| <input type="text" value="Client Contracts"/> | <input type="text" value="8"/> | <input type="button" value="X"/> |

A Board represents your Business Process and the Panels the Steps in that Process.

To design a system for your business, login/register for the [free 21 day trial](#), then click Design Board and Create Board and Panels.



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Step 2 Design your T Card Template

WebTCards.com

T-Card Template Creation - Design your blank T-Card

T-Card Template Details (Tip : Choose a Name which describes the information you will type onto each card)

Template Name : Mail Queries to :

Template Colour : ... Default Board :

Board Colour : Panel Colour :

 [View Audit](#)

Design your T-Card (Tip: Type a Label Name for each line of information you will record e.g.'Name', 'Quantity'etc)

| Seq | Label Name | Description | Data Type | Max Char | Mandatory | Header | Delete |
|-----|--|--|-----------|-------------------------------------|-------------------------------------|--------------------------------|----------------------------------|
| 1 | <input type="text" value="Client"/> | <input type="text" value="Client"/> | Text | <input type="text" value="50"/> | <input checked="" type="checkbox"/> | <input type="text" value="1"/> | <input type="button" value="X"/> |
| 2 | <input type="text" value="Our File Ref."/> | <input type="text" value="Our File Ref."/> | Text | <input type="text" value="10"/> | <input checked="" type="checkbox"/> | <input type="text" value="2"/> | <input type="button" value="X"/> |
| 3 | <input type="text" value="Agent"/> | <input type="text" value="Agent"/> | List | <input type="button" value="Edit"/> | <input checked="" type="checkbox"/> | <input type="text" value="3"/> | <input type="button" value="X"/> |
| 4 | <input type="text" value="Solicitors Note Pad"/> | <input type="text" value="Solicitor Note Pad"/> | Text | <input type="text" value="1000"/> | <input type="checkbox"/> | <input type="text"/> | <input type="button" value="X"/> |
| 5 | <input type="text" value="Initial Letters"/> | <input type="text" value="Initial Letters"/> | Date/Time | | <input type="checkbox"/> | <input type="text"/> | <input type="button" value="X"/> |
| 6 | <input type="text" value="Client Instructions"/> | <input type="text" value="Client Instructions"/> | Date/Time | | <input type="checkbox"/> | <input type="text"/> | <input type="button" value="X"/> |
| 7 | <input type="text" value="Contract Receivd"/> | <input type="text" value="Contract Receivd"/> | Date/Time | | <input type="checkbox"/> | <input type="text"/> | <input type="button" value="X"/> |
| 8 | <input type="text" value="Deeds Received"/> | <input type="text" value="Deeds Received"/> | Date/Time | | <input type="checkbox"/> | <input type="text"/> | <input type="button" value="X"/> |

Each T Card records a Task, before you can create your T Cards you must design a T Card Template – a list of the information you want recorded on each T Card

To design a T Card click Design Board and Create Template. Each T Card can have up to 40 lines.



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Congratulations you have a fully working WebTCards system

- Now try some of our advanced features
 - To sort the T Cards automatically on your Board or to allow others to access your Board securely, click design Board and then Advanced Options
- See what you can do with your WebTCards System
 - Set your T Card colour to change automatically using the T Card Template List data type
 - Filter Board
 - Find T Cards
 - e-mail T Card
 - Graphical summaries with Key Performance Indicators
 - And so much more

