

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



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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. LindsayKT23 4EFBell			<ul style="list-style-type: none">Miss HarrisTW7 5DHDaniels					
<ul style="list-style-type: none">Mrs A. M. GrahamHA6 2LEDaniels								
<ul style="list-style-type: none">Mrs HardieDT1 2BJDaniels								
<ul style="list-style-type: none">Mrs ToynbeeTQ13 9TSDaniels								
<ul style="list-style-type: none">P. C. LindsayGL56 0UPGabby								
<ul style="list-style-type: none">Sir Peter OsborneGL53 9QzGabby								

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="Delete"/>
<input type="text" value="Waiting Instruction"/>	<input type="text" value="2"/>	<input type="button" value="Delete"/>
<input type="text" value="Waiting Deeds"/>	<input type="text" value="3"/>	<input type="button" value="Delete"/>
<input type="text" value="Waiting Contract"/>	<input type="text" value="4"/>	<input type="button" value="Delete"/>
<input type="text" value="Waiting Enquiries"/>	<input type="text" value="5"/>	<input type="button" value="Delete"/>
<input type="text" value="Waiting Search"/>	<input type="text" value="6"/>	<input type="button" value="Delete"/>
<input type="text" value="Waiting Mortgage Offer"/>	<input type="text" value="7"/>	<input type="button" value="Delete"/>
<input type="text" value="Client Contracts"/>	<input type="text" value="8"/>	<input type="button" value="Delete"/>

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

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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="checkbox"/>
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="checkbox"/>
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="checkbox"/>
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="checkbox"/>
5	<input type="text" value="Initial Letters"/>	<input type="text" value="Initial Letters"/>	Date/Time		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
6	<input type="text" value="Client Instructions"/>	<input type="text" value="Client Instructions"/>	Date/Time		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
7	<input type="text" value="Contract Receivd"/>	<input type="text" value="Contract Receivd"/>	Date/Time		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
8	<input type="text" value="Deeds Received"/>	<input type="text" value="Deeds Received"/>	Date/Time		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

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

