



Revolutionary Home Moving Technology for the Property Industry

Convey365 Conveyancers



Built by Conveyancers for Conveyancers, Convey365 is the first complete end-to-end, fully integrated conveyancing IT system in the UK.



Our Convey365 IT system is available by invitation only, is complimentary to use and guaranteed to increase profitability.



Tested on 60,000+ transactions and with 100,000+ satisfied clients, Convey365 is both award winning and the safest conveyancing IT system in the UK.

Our History

Convey365 is a totally independent and sister organisation to award-winning and industry-leading conveyancing legal practice Convey Law. Over the last 20 years we have built the IT systems, compliance policies, procedures and training infrastructure to support your business.

We understand the challenges and difficulties of running and growing a specialist residential conveyancing legal practice. Our Conveyancer partnerships facilitate business growth, using the very best IT system, with complimentary compliance, security and staff wellbeing policies, procedures and professional training.

The Convey365 Introducer Franchise

- ✓ Bespoke, Secure, Accessible & Compliant
- 👤 Client Quotes, Sales & Referrals Made Easy
- £ The Most Effective Client Onboarding & Communication
- 🛡️ Complete Risk & Security Compliance
- 🏦 Linked Accounts & Bank Payment Reconciliation Systems
- 🕒 Realtime Legal Panel KPI Management & Reporting
- 📖 Complimentary Training & Development
- 😊 Work – Life – Balance
- ❤️ Giving & Charity



Convey365 - Bespoke, Secure, Accessible & Compliant

Our award winning IT products are guaranteed to increase client satisfaction and profitability.

Convey365 is the safest conveyancing IT system in the UK, providing ID and AML compliance to HM Land Registry Safe Harbour standards, we are Cyber Essentials Plus and ISO270001 Accredited and compliant to SRA, CLC and FSA standards. All IT products are white labelled to Conveyancer brand requirements and our open API links to all required conveyancing services and legal panels.

Client Quotes, Sales & Referrals Made Easy

Our white labelled online quoting system can be hosted on the Conveyancer website, provides transparent, real-time conveyancing quotes to regulatory standards, and is customisable to different fee structures and referral fees for all transaction types.

Our Conveyancers enjoy access to our Convey Elite Legal Panel, enjoying referral work from our Introducers and through our Convey Quote website referrals.

The Convey365 Call Centre facility allows for ease of client contact, sales conversion, onboarding and payments, with an open API link for Introducers of business.



The Convey365 Portal & App

Highly Effective Client Onboarding & Communication

Our online Client Portal & App delivers the required legal, AML and financial information to the Conveyancer, and links directly to our Conveyancer Case Management System (CMS).

The Client Portal includes the following key features:

- Artificial Intelligence & Document Production
- Client ID to HMLR Safe Harbour Standards
- Source of Funds & Open Banking Compliance
- Risk & Source of Wealth Validation
- Client Communication & Case Tracking Updates
- Digital Signatures, Document & Reports
- Cyber Security Protection



Artificial Intelligence & Document Production

Document production and form filling is AI assisted, with automated Avatar videos on every screen, and with our AI Chat Bot available 24/7 to talk to Clients and guide them through the onboarding process.

Client Identification to HMLR Safe Harbour Standards

HMLR Safe Harbour Standards are achieved through our ID Validation App with live video – biometrics – cryptographic passport scanning - electronic data and address verification - producing validated ID Reports and signposting next steps in the event of non-compliance



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The first in the UK to directly
access HM Passport Data in 2021



Source of Funds Compliance

Clients itemise and validate funds through our industry-leading Proof of Funds Online Calculator, and our Open Banking App. Gifts and Loans are managed with similar automated Gifto validation checks.

Open Banking Security

Our Open Banking IT facility to transfer Client funds is a pioneering, totally secure and cyber-safe money transfer functionality.

Risk & Source of Wealth validation

Risk assessment is engrained within the Convey365 IT system, with client requirements, personalities, finances and the complexity of the transaction continually assessed.

Client Communication & Case Tracking Updates

All Client communication – email – telephone – documents – can be managed through the Client Portal or App, increasing engagement, managing expectations and providing a completely cyber safe communication environment.

Digital Signatures, Documents & Reports

Clients sign Contracts, Forms, SDLT Returns, Deeds and Reports in the Client Portal, with dual authentication and HMLR Safe Harbour standards providing validation and effective cyber security.

Cyber Security Protection

All Convey365 IT systems have been built to the highest IT security specifications and standards, deploying industry best practice to combat and eradicate cybercrime.

- ✳ Multi-Factor Authentication
- ▶ Cyber Security Client Videos
- 🔒 Secure Hard-Coded Client Account Bank Details
- £ CBAC & Open Banking Verification & Transfers
- ✓ Conveyancer & Lender Bank Account Verification
- ⚠ Integrated HMLR Property Alert & Fraud Restrictions on completion



The Convey365 Conveyancer Case Management System

Convey365 CMS is revolutionary and market-leading:

- ⚙️ Revolutionary Digital Conveyancing Workflows
- 📊 Priority Defined Conveyancer KPI Dashboard
- 🤖 Integrated & Automated Artificial Intelligence
- £ Complete Accounts, Payment & Reconciliation Integration
- 📄 Excellent Management Information
- 💬 Online Client Service Reviews
- 🔗 HMLR, SDLT & Introducer Integration
- 📞 Telephone, Post and Video Integration

Revolutionary Digital Conveyancing Workflows

Convey365 CMS checklist workflows and KPI milestones ensure client service delivery, transaction safety and risk compliance.

Priority Defined Conveyancer KPI Dashboard

The CMS Dashboard assists case management, client service delivery and KPI compliance:

- 📞 Pilot Calls – client introducer call reminders
- 📈 Projected Exchanges – cases to exchange in the month
- 🔔 Completions & Reminders – diarised completions & reminders
- £ Fees & Billing – average fee earning data
- 💬 Client Service – feedback service scores
- 🏠 Capacity Management – number and type of transactions
- ⚙️ Work Allocation – to individuals or department



Pioneered the first electronic exchange of contracts in 2018



Integrated & Automated Artificial Intelligence

Convey365 CMS has Artificial Intelligence - AI - at its core. Title Check, Search and Mortgage Offer reporting and automated AI contract production compliment the AI Client facing Avatars and Chat Bot to help both Clients and Conveyancers.

Post and emails are automatically categorised and allocated to the correct transaction, with the correct execution of Deeds and documents AI verified on arrival. Our AI raises and answers additional enquiries and identifies additional legal work and fees.

Conveyancers use their expertise alongside expert AI reporting and resolution functionality, which saves time, increases communication, revenue and profitability.

Complete Accounts, Payment & Reconciliation Integration

Convey365 CMS is linked to our bespoke Accounts Management System (AMS), with Completion Statements automatically posting completion day accounts instructions.

Management Reports include all relevant, Client Accounts, HMRC and HMLR reconciliation reports, and a plethora of reports required to manage and run a busy and fully compliant conveyancing practice safely and to CLC and SRA regulatory standards.

Our Payment Manager System (PMS) is both fantastic and revolutionary:

- ✔ It provides an interactive report of expected funds and completions
- ✔ Identifies and reconciles expected transfers into Client Account
- ✔ Facilitates outward payment following reconciliation
- ✔ Notifies CMS & Conveyancers automatically of fund transfers and receipts
- ✔ Completion day checklists ensure full reconciliation before payments are made
- ✔ CBAC searches & Open Banking client transfers are integral for cyber security



Excellent Management Information

The Portal MI Reports link to CMS and have been defined over the last ten years to provide every conceivable management and KPI matrix to run a successful Conveyancing business.

Billing and Fee Earning – Charging Appropriately

The CMS increases revenue by ensuring every client is charged appropriately:

- ✔ It recognises additional work and automates appropriate additional legal fees
- ✔ Fee discounts require appropriate authorisation
- ✔ Introducer additional charges are automated and charged appropriately
- ✔ Legal Costs are updated automatically as they occur in the Client Portal
- ✔ Fees on cancelled transactions are calculated and workflow recovered

Online Client Service Reviews

Client Service Reviews (CSR) are requested through the Client Portal, with an automated online review link to Trust Pilot, Google and the ESTAS.

HMLR, SDLT & Introducer Integration

HMLR, SDLT and search provider API integration facilitates the seamless request and transfer of information and documentation, with automated accounts reconciliation.

Telephone, Post and Video Integration

CMS Telephone integration allows for ease of use, missed call and returned call reporting and automatic telephone recording. Video conferencing with on-screen checklists and form-filling explanations, facilitates excellent client service, due diligence, and identity verification.



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Supporting you in building
your business



Convey365 Conveyancers

Our objective is to support and help you:

- ✓ Build your business
- ✓ Increase your profitability
- ✓ Train your team
- ✓ Manage risk and compliance
- ✓ Achieve work life balance
- ✓ Support your favourite charities

The Convey Quote website and Elite Legal Panel provide infinite opportunities for revenue. Our IT systems are guaranteed to remove many of the pain points of residential conveyancing, making your business more efficient and profitable. Training and Risk compliance is automated through CMS, with scripts and our Chat Bot explaining why and how the system and workflows work.

The Convey365 “Exchange” – Engage Your Tribe!

Our “Exchange” Intranet is an internal Social Media communication platform and directory. Our Conveyancer partners enjoy complimentary:

- ✓ Conveyancing Policies, Protocols & Procedure precedents
- ✓ Access to HR & Wellbeing HUB
- ✓ Star of the Month Voting System
- ✓ Departmental Precedent Folders
- ✓ NQA Training and Development

With so many people working away from the office The Exchange is a proven way to keep the Company Tribe together and engaged. Out of 150 individuals and with only 30% in the office most of the time, our Tribe voted Convey an “Outstanding” place to work in the Top 100 UK Companies Survey 2025.

Charity Fundraising and Giving

The Conveyancing Foundation Charity Lotto is integrated into our Convey365 IT system and has helped to raise over £1.2 million for charity since 2010. Giving is good for the Soul - We will help you to support your chosen charities!





Revolutionary Conveyancing

The Convey365 is the most effective conveyancing IT system in the UK.
It is user-friendly, safe and revolutionary – it is the future of conveyancing in the present.

Convey 365, Maxwell Chambers, 34-38 Stow Hill, Newport. NP20 1JE

📞 01633 261780 ✉ info@convey365.com 🌐 www.convey365.com

