WatsonRamsbottom

Onboarding

Accept Quotation

Create Portal Account

Complete tasks within your Secure Online Portal

Complete ID checks with Credas

Arrange for payment on your account

Creating a Portal Account

Head to ‘Portal Login‘.

Select ‘New User‘ where you will be able to issue a secure code to your e-mail.

TIP: Please use the same email address as your quotation

If you have not yet accepted your quotation, find your quote and click accept, found at the bottom of the quotation itself.

Your Portal Menu

My Tasks

A digital to do list which can provide us with the information we require

My Quotes

Your breakdown of costing

My Cases

A hub of all your matters with Watson Ramsbottom Solicitors

Completing Your Paperwork - Selling

Property Information Form

Also known as a TA6. Designed to give us important information regarding your property such as services, planning and compliance.

Fittings and Contents Form

Also known as a TA10. The form sets out in detail all of the fixtures and fittings staying or leaving a property upon the sale completing.

Sale Questionnaire

Also known as a PIQ. Designed to help us capture the main details of your sale and help us in answering questions by the buyers solicitors.

Disclosable Overriding Interests

To disclose to the Land Registry certain rights or interests that affect the property.

Completing Your Paperwork - Purchasing

Purchase Questionnaire

Designed to assist us in capturing details of your purchase.

Terms of Business & Client Information Form

Confirmation that you are happy to proceed.

How are you funding your transaction?

Your source of funds questionnaire as per Regulations.

Credas – Your ID Verification

Once your Paperwork has been completed. We will issue you a link to Credas, our online ID Verification provider. Credas has been designed to be secure, quick and easy to use.

Please take a clear photo of your original proof of address documents. Computer and mobile screenshots of documents are not accepted.

One form of photo identity:

- Passport (Recommended)
- Driving Licence
- Electronic Identification Card

Two Forms of Proof of Address documentation dated within the last 3 months:

- Driving Licence (Please note that we cannot use your Driving Licence as proof of address if used as your Photo Identity)
- Utility Bill
- Telephone Bill
- Insurance Letter
- Mortgage Statement
- Council Tax Bill
- Bank/Building Society Statement
- TV Licence
- HM Revenue and Customs Letter
- Letter from Benefits Agency

Payment on Account

Upon completion of your documentation, please arrange for your payment on account to be issued to:

Watson Ramsbottom Limited
Barclays Bank
SC: 20-09-72
Acc No: 00223719

Please use your Surname and the Postcode of the property / new property as a reference.

Once paid, your Onboarding is completed. Your conveyancing professional will be in touch to discuss the next steps. Please note your payment on account acts as credit on your matter.