Run a sale, purchase or remortgage

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The conveyancing pack gives you sale, purchase and remortgage work types with their stages and standard tasks. Each matter keeps the property's details, the date its tax return is due, and a completion statement you build as you go.

Before you start
An admin switches on the **Conveyancing** pack. It adds the **Residential sale**, **Residential purchase** and **Remortgage** work types, with Scottish versions if you work in Scotland.

1 Open the matter

Go to **Matters**

Open a matter in **Residential sale**, **Residential purchase** or **Remortgage**. See Open a matter.

2 Work through the tasks

As the matter reaches each stage, its owner gets that stage's standard tasks, like **Check ID for every buyer** and **Get bank statements showing where the money comes from**. Tick them off in **Tasks**.

3 Fill in the property

Choose **Conveyancing** down the matter's side. Fill in the **Address**, **Title number**, **Price** and, outside Scotland, the **Tenure**, then press **Save**.

The links underneath open the land registry and tax sites you'll need.

4 Keep the tax return on time

On a purchase, Desk works out when the stamp duty return is due, 14 days after completion, or the LBTT return in Scotland, 30 days after the date of entry. Set the completion date in **People and dates**, and the matter's owner hears a week before it's due.

5 Check for fraud

Under **Fraud checks**, the buyer's bank statements and the signed transfer or disposition show once they're in the matter's documents. Press **Check for alterations** on a statement, or **Check signatures** on a deed.

6 Build the completion statement

For each line, say what it's for, choose **Received** or **Paid out** and give the amount. Press **Add a line** for more. The total tells you what the client pays you or you pay them. Press **Save**.

7 Make the PDF

Press **Make the PDF**. The statement goes in the matter's documents, ready to send to the client.

In Scotland it's called a settlement statement.

If something goes wrong

There's no Conveyancing in the list down the matter's side.
The matter isn't in one of the conveyancing work types, or the pack is off. Check its work type, or ask your Desk admin.

A bank statement doesn't show under Fraud checks.
Desk looks for documents described as bank statements or proof of funds. Give the document a description like that in **Documents** and it will show.