Conveyancing Portal.

A quick overview

NHBC

Logging into the Conveyancing Portal

① If you are an **Existing User** sign in via step 1.

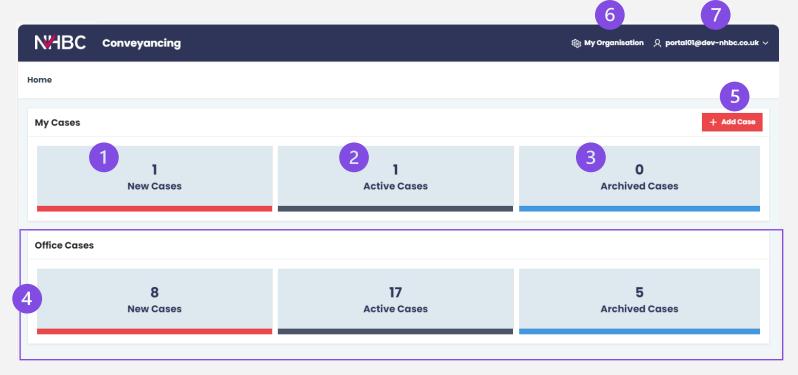② If you are a **New User** sign up via step 2.

The Conveyancing Portal is an online application that consolidates all the information required to support your clients through their purchase of a newly-built home.

It's the place where you can manage your cases and your colleagues' cases.
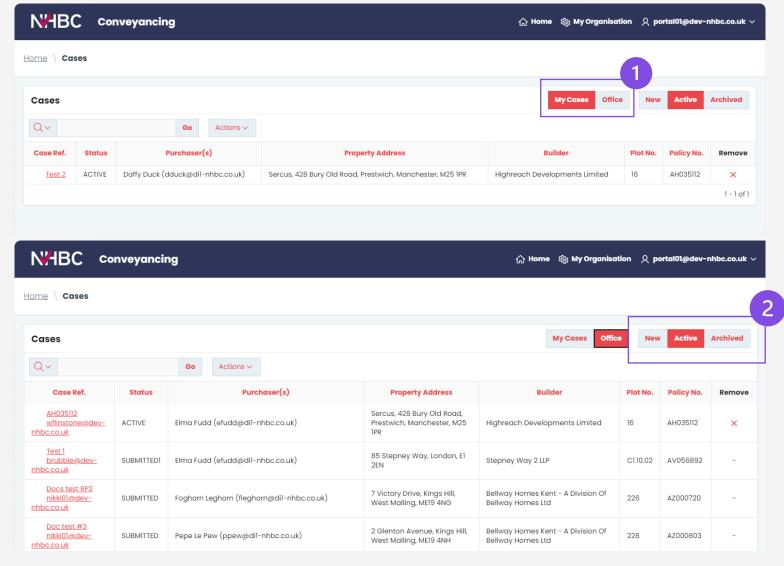
NHBC

Home page

From here you can:

1. view your cases that have not yet been progressed

2. view your cases in progress

3. view your archived cases

4. view your colleagues' cases within the same office

5. add a new case with the policy number and activation code

6. view your organisation's information
   • add users
   • change company/office address

7. access user menu:
   • view and update your profile
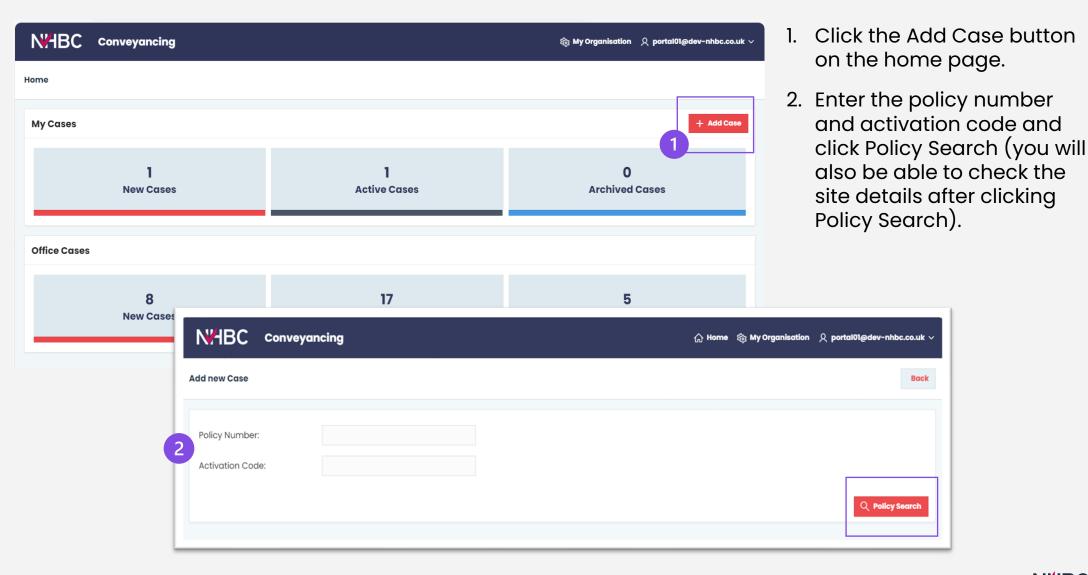   • access help documents
   • sign out

Cases

Here you can see the cases linked to your account or your colleagues' accounts.

There are ways to amend the views:

1. Whose cases (by owner):
   - My Cases – your own cases
   - Office – your colleagues' cases.

2. Case status:
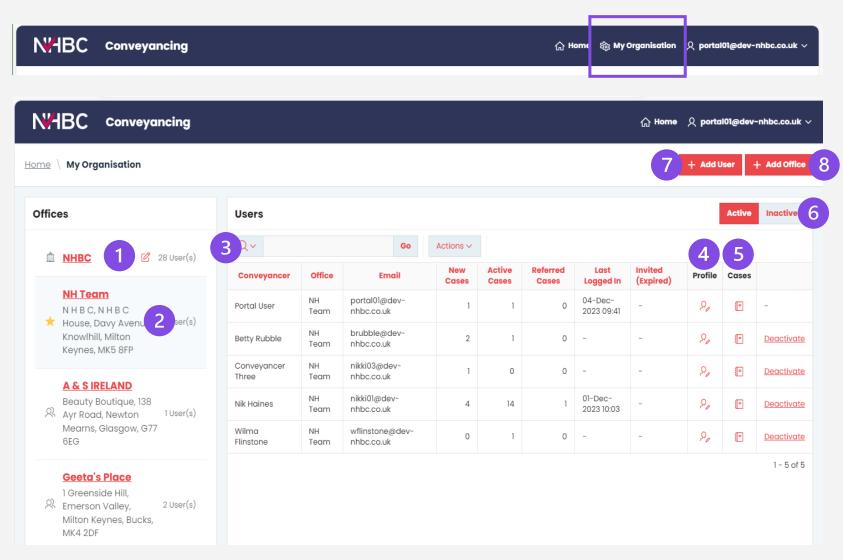   - New
   - Active
   - Archived.

Add a policy to your case

1. Click the Add Case button on the home page.

2. Enter the policy number and activation code and click Policy Search (you will also be able to check the site details after clicking Policy Search).

My Organisation

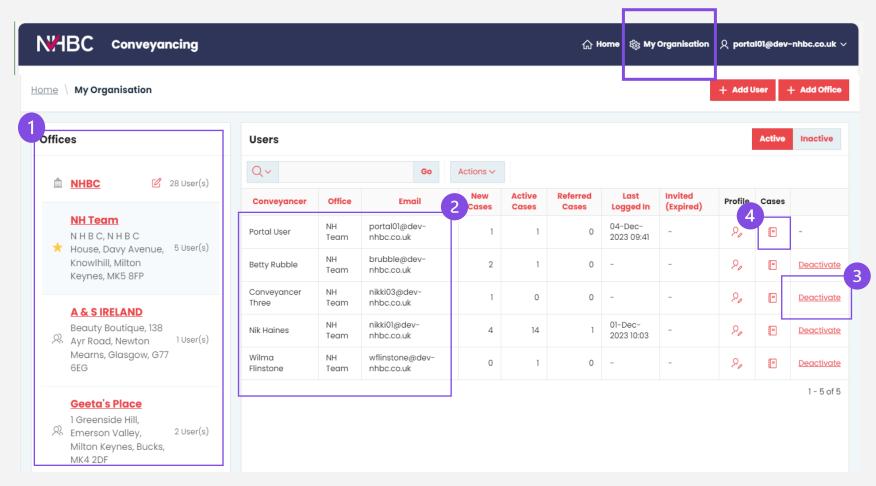**The My Organisation page allows you to manage the organisation details:**

1. view and edit the organisation name
2. view office details
3. view users based on the selected office
4. view profile of selected user
5. view cases of selected user
6. user status toggle
7. add a new user to your organisation
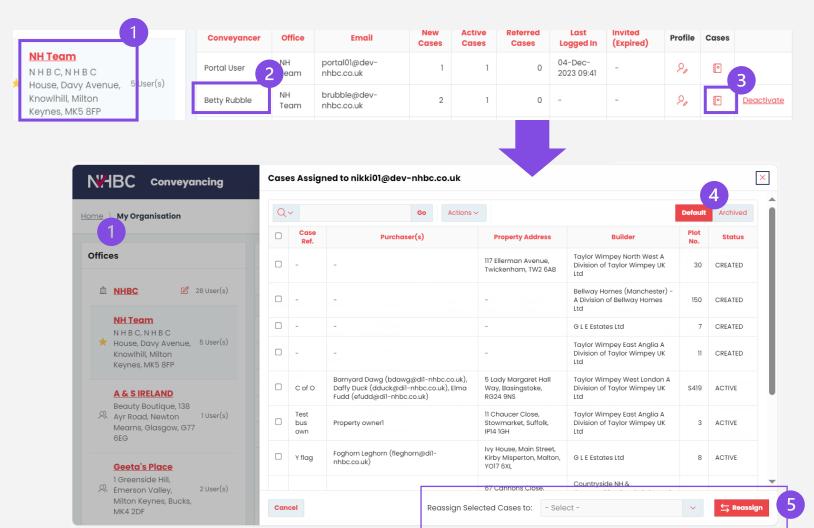8. add a new office to your organisation.

Deactivate a user

From My Organisation

1. Choose which office they are in.

2. Locate your colleague's name.

3. If you need to deactivate a user click here.

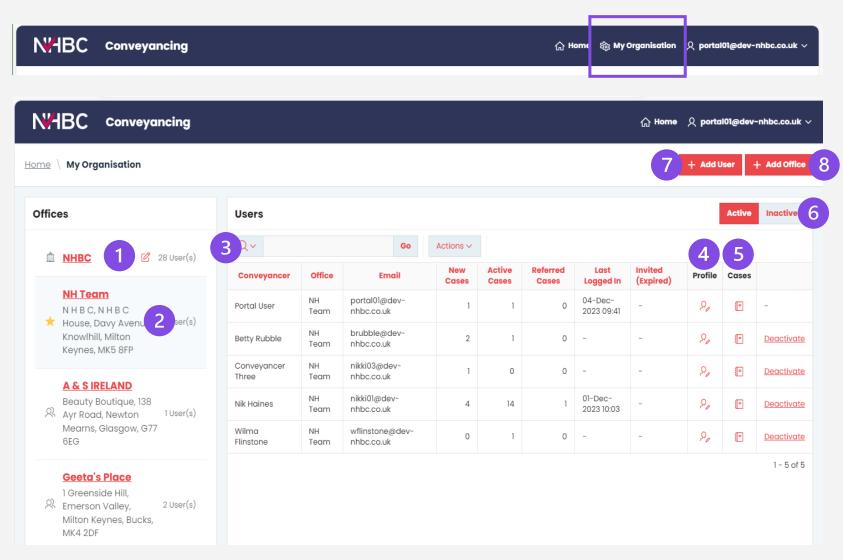4. If you need to see what cases a colleague has, click the book icon.

Reassign a case

From My organisation
1. Locate the office.
2. Locate the name of the person the case/cases sit under.
3. Click on the cases icon.
4. Amend the toggle view accordingly.
5. Reassign cases to yourself or other colleagues in your organisation.

My Organisation

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2. view office details

3. view users based on the selected office

4. view profile of selected user

5. view cases of selected user

6. user status toggle

7. add a new user to your organisation
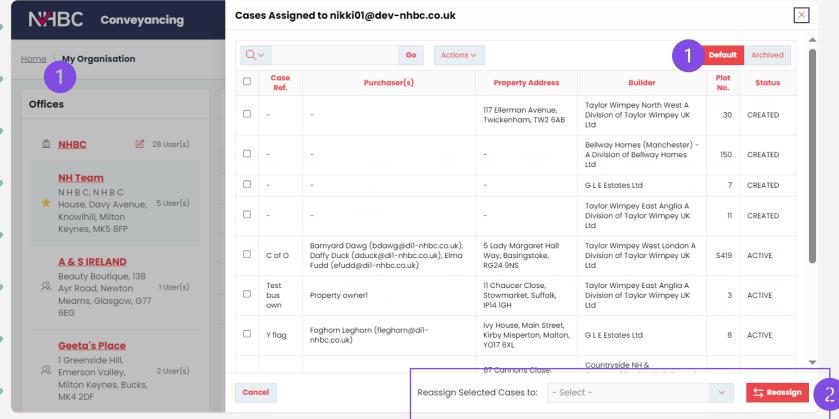
8. add a new office to your organisation.
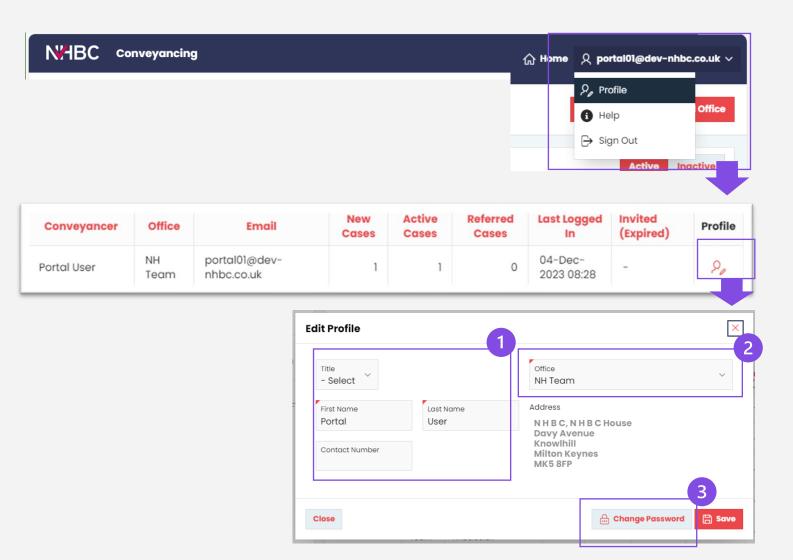
Cases for a selected user

Cases

This is a view of the selected user's cases.

1. Amend the toggle view accordingly.

2. Reassign cases to yourself or other colleagues in your organisation.

Profile – change your details/office address

Should you need to change your office or details…

You can view and edit your profile using the 'Profile' option from the user menu in the top right (or clicking the profile button for My Organisation').

You can change your:
1. personal details
2. office address
3. password.

Please Note:
If you need to change your email address you will need to contact an NHBC Customer Services representative.

Need support?

For more information about
My NHBC Portal, please contact
NHBC's Portal Support team on
0344 633 1000 or email us
at ccsupport@nhbc.co.uk