Transitioning to Realtime Conveyancer

We want your move to Realtime Conveyancer to be easy! Following these few simple steps will ensure the transition goes smoothly.

From seeing a Demo to Transacting in the system generally takes between 1 to 4 weeks depending on how much you'd like to customise and how quickly you can prioritise your time. See our steps below to assist you on your journey to adopting our world class system built by conveyancers for conveyancers.

Step	What's involved	Task time	Typical duration*
Demo	• Book a demo at your preferred time via our website or using the Book a Time with Me link in the email of one of our friendly team. Let us show you how Realtime Conveyancer can make you 50% faster and 100% happier in your business by removing the most cumbersome tasks in conveyancing. • Review our Standard Workflow and consider how that will work for your practice, or if you'll need workflow and template customisations. It can also be a good opportunity to review some of your existing workflows and processes - how long have you had them for? Could they be ripe for an update? We can make that easy!	45 minutes to 1 hour	1 week
Apply	• When you're ready, fill in your Application Form online to get started. • We'll send you an invite to set up your Activation meeting and team Training session. We'll also request the details of team members who need access so we can set up your accounts. Remember, you'll be charged by Matter not person so add as many team members as you need! Billing details will also be set up by our accounts team ready for when you start transacting in the system.	15 minutes to apply 24 hours to setup team access	
Activate	• The next important step is to set up your Activation meeting. At this meeting, we'll orientate you as the principal - or your office manager if you're a larger team - around the system and work with you to set up your organisational settings, trust account and fees and disbursements. • This includes showing you how to do typical tasks and securely move from your current system. As part of this, it is handy to have copies of your logos, email signatures and any templates that need to be set up in the platform. This will make sure the system feels familiar to your team when they start using it. • To complete your Activation, book your team in for their Essential Kick-off Training.	One to three day turnaround depending on customisations	2-3 weeks
Onboard	• To ensure your experience is seamless, we will set up a two-hour training session in your offices at a time that works for you. It will teach your team how to do typical tasks inside Realtime and get them comfortable with the system so you can transition easily off your current system. • Experience shows that spending this time up front will save you significantly in the long run. Don't stress. We will bring morning/afternoon tea - because everything is easier with cake!	Two hour intensive kick off session	
Support	• Need help? Our 24-hour AI assistant Ruby has loads of tips and tricks at your fingertips for fast answers all day every day. • We also run regular workplace training sessions, virtual sessions when required and webinars and undertake roadshows to help you refine and revise your skills. • You can also lodge a support ticket through the platform our team will be on standby to help by email and phone during business hours.	As required	On demand

* Based on average experiences by current clients

REALTIME conveyancer