

This brief guide provides a quick “How To Guide” in placing orders through the Anglia Research Portal. Alternatively, you can watch a short “How To” video here:

Ordering Estatesearch Reports

1. Accessing the Portal

1.1. You can register and login on the dedicated Anglia Research portal by following this link:

<https://app.estatesearch.co.uk/r/anglia-research>

Enter your username. Your username will typically be your company email address.

1.2. Enter your password. This will have been set by you when you activated your account. If you have a password, it will typically be your company email address followed by a number. If you do not have a password, you will be prompted to create one. Your password must be at least 8 characters long and contain at least one uppercase letter, one lowercase letter, one number and one special character.

2. Viewing Cases

2.1. Upon log in you will be able to see all your present and past cases, including any draft cases with no reports.

2.2. By default, we will display only the cases that you have ordered or are managing. You can select to view all cases, including those that are not yet ordered or managed.

2.3. You can quickly search your cases by typing your reference or the subjects name in the search bar at the top of the page.

3. New Cases

3.1. You can place a new order by clicking ‘New Case’ in the top right of the ‘My Cases’ page.

3.2. Create the case by selecting the type of matter (Bereavement or Mental Capacity) and whether the case is for a will or a grant of probate.

3.3. Complete the case details by entering your reference, the name of the deceased, their date of birth, their date of death, their address at the time of death and their current address later.

3.4. Clicking 'Create Case' will create a case for the deceased against which you can then 'Order Reports'. You can quickly skip to 'Order Reports' by selecting this when creating your case.

3.5. Select any searches required including our award-winning Asset and Liability searches, the Financial Profile Service. You can also easily add Gazette Notices, Local Advertisements or Will Searches. Once selected click “Place Order”

3.6. Finally, we will ask for any additional information relevant to the searches selected including previous names, previous addresses, and national insurance number. Any additional information held is helpful in supporting our enquiries as part of the asset searching process.

3.7. The final step will also ask you to provide a few key pieces of evidence in order to enable the search.

Which for bereavement matters will be;

- 1) A copy of the death certificate, coroner's report or solicitor's certificate verification form;
- 2) Evidence of your appointment. If you acting as Executor, a copy of the Will or Grant OR if you're advising a client, a copy of a signed client engagement letter;
- 3) A copy of our Letter of Authority copied on to your headed paper and signed by a member of your firm (once we have a copy on file, we can automatically generate future letters).

N.B. We will also continue to accept instructions using forms of evidence previously submitted to Landmark FAS.

3.8. Confirm and accept the Order for the Case.

4. Completed Orders

4.1. Once an Order has been placed you will receive notification by email that it is underway. You will be able to see the Order is 'Processing' when viewing your Cases. By clicking 'Open Case' you will be able to see which Reports associated with the Order are still processing and the expected date of delivery.

4.2. Once a Report associated with an Order is complete you will receive an email with a notification including a link so you can quickly log in to view and download the completed Report.

5. Additional Orders

5.1. If you wish to order an additional search or Report against a Case, simply click 'Open Case' and select 'Order Reports' in the top right-hand corner. You will then be able to quickly add any additional searches required.

6. Invoicing

6.1. Invoicing is all arranged centrally. We raise invoices at the end of each month for all Orders placed in the preceding month, sending details to you or your central accounts team depending on your company's preference.

7. Getting in Touch

7.1. We hope you find the above User Guide helpful and informative. You can also access the following short training videos online;

- [“How To” Ordering Estatesearch Reports](#)
- [“How To” Evidence Requested for Estatesearch Asset Searches](#)

If you need any further IT help or support, please do not hesitate to contact the helpdesk team:

T: 0330 900 1700

E: helpdesk@estatesearch.co.uk

