

**Are you ready to  
unlock your potential?**

**Visualfiles™**

Legal management software that delivers on  
what it promises and beyond.

## Would you like to handle more cases, increase your margins and improve customer experience in a constantly evolving market?

The UK Property Market is more competitive today than ever before. Buyers and sellers are faced with significant choice and have high expectations of delivery. To stay ahead of the competition, you need to be able to differentiate your offering, provide a consistently high level of customer service and offer more value to your client. Clients and prospects no longer hope that you will use technology to improve their experience - they expect you to.

The challenge you face is how can you achieve all these things and become a more profitable business? The answer is Visualfiles.

Trusted by the majority of the UK's leading conveyancing practices, Visualfiles is the proven case and legal project management system that enables you to handle more matters, more effectively, at a lower cost whilst improving client experience.

Visualfiles has long been the market leading agile, business focused case management tool - but now you can take the power of Visualfiles out of the box using the Conveyancing Accelerator and deliver a quicker ROI.

*"Visualfiles came up trumps as a proven, modern system that can robustly scale in line with our ever multiplying business transactions... It is the lowest risk/highest reward option."*

IT Director, MyHomeMove

## Automated Intelligence and integration lets you achieve more whilst doing less

Time spent jumping between multiple websites rekeying information and chasing multiple third parties slows you down and increases the cost of a conveyancing transaction. It also takes the case handler away from working on the more complex issues and just as importantly spending time speaking with the client. Visualfiles provides integrations with key industry providers, be that for searches, the Land Registry or HMRC. It also manages processes such as the Land Registry's Electronic Document Registration Services (eDRS) to reduce duplication and risk rekeying information already held on your system.

Unlike many other systems, it also enables you to integrate with the third party products you need to work with - not just the ones that the provider offers.

To differentiate the service that you provide, you need a software platform that is not only highly powerful out of the box, but one that enables you to continually refine and improve your offering to stay ahead of the market.

### Land Registry data shows that:

- Six of the top 10 conveyancing firms in the UK use Visualfiles, including MyHomeMove, Countrywide Conveyancing Services and O'Neill Patient Solicitors LLP.
- More than 60% of the sale and purchase transactions undertaken last year were processed using Visualfiles.

Businesses who use Visualfiles for their property and conveyancing requirements improve processes and adapt faster than their competitors to changing market conditions. They are able to do this because Visualfiles is a fully configurable business tool that puts the power back in to the hands of the business.

**This is what makes us the no.1 legal conveyancing software in the UK conveyancing market.**



## What do you get with the Visualfiles Conveyancing Accelerator?

With Visualfiles you get a complete system to manage your cases end to end, from contact management, document production, email management and task automation. When you add our Conveyancing Accelerator you will receive the automated workflows, documents and key data capture you require to deliver an efficient conveyancing service, including management of activities to support the complete customer conveyancing lifecycle:

- Quotation
- Instruction
- Exchange
- Completion
- Abortive sale/purchase
- Linked sale and purchase

### With the Visualfiles Conveyancing Accelerator, you can:

- Increase caseload volumes without compromising the quality of work
- Minimise costs of producing work through automating tasks, processes and workflows
- Increase customer service levels by freeing up staff from any administrative work, allowing them to spend more of their time developing client relationships and winning new business

## Transforming productivity into profitability

- **Case and Matter Management** – Visualfiles is ideal for high volume transactional operations as well as low-volume, high-value bespoke work.
- **Process Automation** – The most flexible legal management software in the market that can scale up and out, evolving and adapting to rapid business needs.
- **Workflow Automation** – Rich development capabilities in the back-end with proven, fast ROI performance, and automated intelligence that enables high-speed background task completion.
- **Third Party Integration** – Out of the box integrations with Microsoft Office, iManage and other leading industry software, whilst adhering to industry standard.
- **Real-time Business Reporting** – Enabling better, faster, more informed tactical decisions to help you drive increased top-down profitability.
- **Client Intelligence** – Powerful real-time insights about your clients to help you maintain and grow your firm’s reputation.

## Conveyancing Accelerators - features and benefits

The Accelerators include all the data and workflows needed to deliver an efficient conveyancing service.

Implementing the Conveyancing Accelerators will give you rapid access to features that will speed up, streamline and de-risk the entire conveyancing process.

Feature	Benefits
Undertakings	Reduces the risk associated with failing to record undertakings by taking away the burden of recording, releasing and producing documents. This helps to ensure that professional obligations are met, and that compliance professionals have full visibility of obligations and exposure.
Financial transactions	Reduces the risk of misquoting prices and fees, and provides early warnings of insufficient funds to enable rapid rectification. This helps to avoid typical sources of embarrassment and client frustration.  Can be linked with your financial systems to automate the transfer of information and completion statement production (subject to integration).  Supports bank transfer requests, with authorisations built in to reduce the risk of fraud.
Security	Supports the recording and checking of security information for parties involved in a transaction, helping to avoid fraudulent phone calls.
Best-practice templates	Enables production of correspondence and other documents needed during the conveyancing process, automatically pre-populated with data from the system, which reduces effort and the risk of error.
Integration with Lexis SmartForms <sup>1</sup>	Automates the production of conveyancing forms, fully populated with case data.
Contact management	Acts as the single point of truth, enabling you to enter contact information once and attach it to any transaction, saving time and effort for users, and helping to avoid mistakes.
Integration with postcode provider <sup>2</sup>	Streamlines postcode and address lookup and reduces the risk of error.
Key stage checklist	Enables you to verify that all steps in a transaction have been carried out.  Helps your junior staff through a supported process, to reduce the risk of errors and complaints.
User guidance and supervision	Enables your staff to be supported according to their experience, so that management is by exception and work is allocated to appropriate team members.
Task allocation	Allows you to make best use of resources based on work volumes, staff skills and absences.
Integration framework	Enables you to integrate Visualfiles with your chosen providers of searches, Inland Revenue integration and other services, to speed up search, stamp duty and other processes. Also helps to avoid duplication of effort and the risk of human error.
Process enquiry handling	Ensures that enquiries are recorded and responded to, tracked and managed.
Opportunities	Supports improvement in your conversion rate and better reporting around new business success.

<sup>1</sup>Lexis SmartForms requires a subscription. Integration with other forms packages can be achieved through additional services.

<sup>2</sup>Out-of-the-box integration with a dedicated postcode provider. Integration with alternative providers can be achieved through additional services.

## Adding capacity through robotic process automation (RPA) workflow

In the residential conveyancing and real estate sector, Visualfiles uses the VisualRobot™ automated intelligence functionality to make a number of existing processes, such as document creation and searching, faster without the need for human intervention.

Why use the VisualRobot within your business? Because you can capture and interpret applications for processing a transaction, manipulate data, trigger responses and communicate with other digital systems real-time, without any hassle or any day-to-day business disruption.

### Benefits of using the VisualRobot:

- Fee earners get more time to do high value work.
- Staff can spend more time working on customer relationships to grow the business organically.
- Simpler, sleeker customer experience that will enhance your reputation within the market.
- Less overhead costs and increased profitability.
- Improved compliance and risk management.

*“We are investing in Visualfiles to enable us to stay a step ahead in the game. Visualfiles will help us to get off the ground quickly, the flexibility it gives us to customise the platform and deploy other complementary applications is something no other solution on the market is able to offer. In adopting Visualfiles, we are future-proofing our technology; and over time, as we create our own unique workflows and processes, we will be developing our own IP. For a firm of our size, this would not be possible without a system like Visualfiles.”*

Director, Fletcher Longstaff

*“It is a proven solution that delivers today, but will do so in the future too. It is the best solution for a high volume business such as ours. It is highly scalable, a capability that is essential for a conveyancing offering. Visualfiles will certainly deliver business efficiency gains and good visibility of the key performance indicators of the firm.”*

IT Director, MyHomeMove

## Plug-and-play tailored modules for tailored customer service

The out of the box Conveyancing Accelerator modules enable you to unlock the power of Visualfiles quickly, as they are designed to be implemented swiftly in order to support the end-to-end conveyancing workflow. By deploying them, your business will be able to:

- Boost caseload volumes without affecting quality of work.
- Lower costs and time spent on cases.
- Free up senior members of staff from administrative work to spend more time on business and relationship development.
- Enable bulk instructions, exchange of data, and reports on real-time performance.
- Allow faster integration with third parties, such as the Land Registry Business Gateway and other online providers, to simplify searches and conveyancing processes.
- Demonstrate greater compliance and risk management, reducing insurance premiums and showing suitability for panel entry.

The conveyancing modules include purchase, sale and quotation, remortgaging, plot and probate, as well as complaints, business intelligence and risk and compliance.

**Do more - better, faster and more profitably. Unlock your potential today.**  
**Legal management software that delivers on what it promises and beyond.**

*“The biggest benefit of Visualfiles is that it facilitates incremental business efficiency. We are endlessly tweaking the system to boost efficiency gains.”*

Managing Partner, O'Neill Patient Solicitors LLP

*“Visualfiles will future-proof our business. The solution is inherently scalable, and a proven leader in the conveyancing market.”*

Chief Executive, YourConveyancer

*“We believe that Simplify has the opportunity to shape the conveyancing market for the better over the coming years. We aim to make life simpler for our customers, introducers, partners and colleagues. With many thousands of people depending on us each year to have the best experience in their property transaction, our business needs a proven technology platform to deliver on our ambition. I am pleased we have selected Visualfiles to deliver our goal.”*

CEO, Simplify

## Contact Us

Search “Visualfiles Conveyancing” online

[www.lexisnexis-es.co.uk](http://www.lexisnexis-es.co.uk)

+44 (0)113 226 2065

LexisNexis Enterprise Solutions, No. 3 City West Business Park, Gelderd Road, Leeds, LS12 6LX, United Kingdom. A division of RELX (UK) Limited. Registered office 1-3 Strand London WC2N 5JR. Registered in England number 2746621. VAT Registered No. GB 730 8595 20. LexisNexis and the Knowledge Burst logo are registered trademarks of Reed Elsevier Properties Inc., used under licence. © v3.2.1 LexisNexis. All rights reserved. The information in this brochure is current as of 01/20 and is subject to change without notice.