



# Integrating InfoTrack & P4W



Faster, efficient conveyancing  
with integrated services



# Partner for Windows, harnessing the power of InfoTrack

With immediate access to InfoTrack from P4W, your credentials will be automatically entered.

Below are several key features of the powerful integration between InfoTrack and P4W.

## Population of data

With automatic population of data direct from Advanced P4W into InfoTrack, this single source of truth minimises the risk associated with using multiple systems, enhancing compliance across your firm and eliminating time spent re-keying. All relevant fields are mapped with information pulled directly from Advanced P4W.

## Document return

Any searches, documents or information ordered via InfoTrack will be automatically attached to the relevant matter. No need to copy and paste, or risk losing documents within your downloads folder or Outlook.

## Financial Integration

Posting slips can be generated with the full transaction-related order information and either posted directly to the client ledger on order or await approval on a line-by-line basis.

## Alerts

InfoTrack updates allows the user to view all orders that have been made through the integration.

Our unique dashboards and real-time alerts relate to more than searches. With built in logic, we alert you within your CMS to actionable items, including SDLT submission dates and AP1 requisitions.

## File Importer

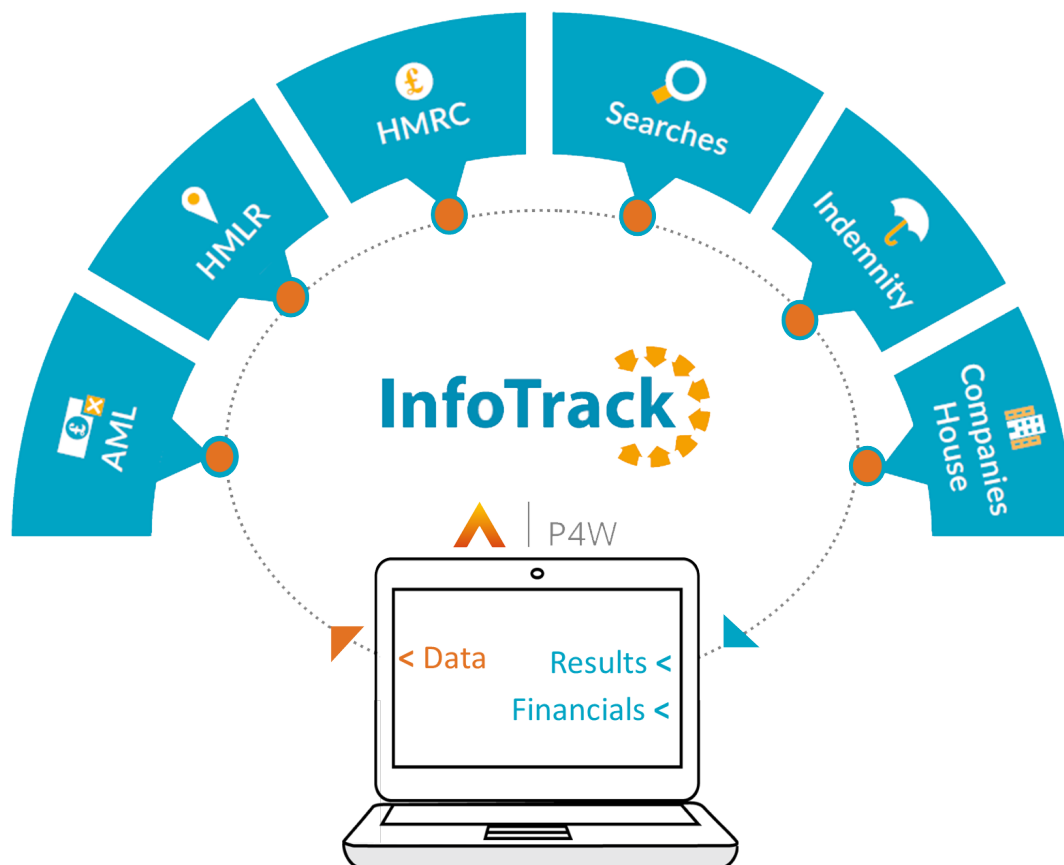
When ordering Land Registry, OS Priority, searches and AP1s, users have the ability to import documents stored in Advanced P4W into InfoTrack.

Click the 'upload' button in each product to be provided with a list of documents stored against the relevant matter. The list will include all PDFs in every matter type.



*"InfoTrack are core partners for Fisher Jones Greenwood. But with the Advanced P4W integration it really does yield savings and ensures our compliance. InfoTrack are very proactive and understand that everything needs to be seamless. The system has saved our post-completion team 20% of the time it used to take, and our finance team are no longer trying to marry up slips or chase disbursements. It was an absolute no-brainer."*

**Peter Carr >**  
**IT Head >**  
**Fisher, Jones, Greenwood**  
**LLP >**



# Assured compliance and on-going support

## Compliance

- > Minimise risk and improve efficiency: we eliminate the need to copy and paste from multiple sources, with data pulled directly from P4W.
- > Keep on top of compliance more easily with our quickly accessible reports from MI-InfoTrack.
- > GDPR friendly: we help you to take care of General Data Protection Regulations (GDPR) as information is automatically connected to matters within Advanced P4W.

## Support

- > Dedicated helpdesk: our team supports all integrations and works hard to give you first-time fixes, with an 86% first-time fix rate.
- > Client focused: we have a programme of sessions throughout the year, sharing best practice, new ideas and peer review insights.
- > Minimal resources: our team of project management experts ensures the necessary data is completed for you if you need additional support.

**Knights**plc

*"By collating information and delivering it directly to those that need it, P4W has increased process efficiency. Communication channels remain open and everyone has an improved view of client matter progression."*

Nigel Johnson >  
IT Director >  
Knights plc >

## InfoTrack



## About Advanced

Advanced has over 30 years' experience in technical systems development. We provide software solutions to more than 5,000 law firms, in-house counsel and barristers' chambers, and more than 50,000 users.

Our legal clients depend on our solutions to support their business aims and processes every day. Our legal-centric software includes integrated chambers and case management systems, process workflows, time recording, Cloud forms, Cloud dictation, document management and digital document bundles.

Many of our customers also rely on our business solutions to manage their core business processes such as HR, payroll, finance, spend management, e-marketing and IT services.

Our goal is to enable our customers to drive efficiencies, savings and growth opportunities. We do this by providing right-first-time software solutions that evolve with the changing needs of their business and the environment they operate in.

## More information

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### People

- eCOS (Electronic Client Onboarding Solution)
- Verification of Identity
- Verification of Funds
- AML
- Lawyer Checker
- Bankruptcy
- SignIT

### Land

- Land Registry searches
- Property searches
- SDLT submissions
- Indemnities
- Quoting Tool
- AP1 applications, unique dashboard and requisition tool

### Companies

- UK Companies search
- KYCIT
- REVEAL
- Register charges online (MR01)

## More information

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