



## Legal Portal for Partner for Windows (P4W)

### Give your clients an on-demand view of their matter

A new generation of legal consumers expect 24/7 online access to their information. Winning business is becoming increasingly difficult for firms who cannot keep pace with the technologies that meet client needs.

Digital communication channels are quickly becoming vital for law firms who wish to retain current clients and win new ones. Modern consumers of legal services want to know who is working on their matter and to be able to communicate easily with them. They also want fast access to information and documents and to become a part of the process to help things move forward quickly.

Many solicitors have benefitted from the adoption of technologies that meet these new expectations. They've found that secure interactions with clients, and related 3rd parties such as estate agents, don't just increase client satisfaction - they also enable matters to progress faster, reduce errors and save time spent on administration.

P4W's Legal Portal, our solicitor/client interface, meets the needs of all involved parties. It allows data to be requested, collected and shared easily through a web browser and gives authorised users secure access to their information via any web enabled device.

#### Automated set-up

Legal Portal securely automates the set-up of users by sending them a registration link. Users simply enter their email address and choose a password to gain entry to their matters.

All authorised clients, or 3rd parties that are involved, can get a quick overview of a matter's progression by clicking the easy-to-view matter progress icon. This takes the user to a specific matter area, showing them what percentage of the matter has been completed.

#### Milestone tracker

The matter milestone tracker allows users of Legal Portal to clearly see what stage a matter is at and what is due next.

Milestones are automatically updated by P4W, giving a real time status without creating additional work for fee earners and ensuring clients and 3rd parties can obtain updates regardless of the time of day. It's a much more convenient option for all involved.

#### Client >

Keystone Law

#### Sector >

Legal

#### Project >

Building an efficient tech platform with P4W integrations

*"P4W's flexible structure, which integrates with many market-leading technology solutions, was quickly realised. We worked with the P4W team to transform our system into an award-winning tech platform and today it is used by hundreds of lawyers who can easily access information whenever and wherever they require it."*

# Legal Portal for P4W

## The efficiency of client self-service

The actions feature within Legal Portal is a communication interface that allows data collaboration between fee earners and clients or 3rd parties. Users can view specific matter related data or, at the firm's discretion, enter or update required information and submit it directly back into P4W, removing the need for repetitive data entry.

User-friendly date fields, tick boxes, pick lists and alpha/numeric text fields are all available to make data compilation easy and straightforward. Fee earners are presented with the data for review before accepting the data into P4W.

Client self-service eradicates the need for lengthy telephone calls and paper based data collection processes and there's no additional time wasted deciphering and re-keying content.

## Secure, collaborative document sharing

Solicitors can easily and securely share documents with clients, contacts and 3rd parties from within the core application, reducing print and post costs and speeding up transactions by giving users instant access. The process also aids GDPR compliance by removing the need to send sensitive data by email.

The P4W user controls who sees each document and there's a comprehensive email notification system to let users know a document is ready for them to view. Access permissions can be revoked at any time.

## Progress notifications

A firm can choose to inform the client or 3rd party by email when important milestones, actions or updates have taken place, directing them to the portal for further information.

## More information

**w** oneadvanced.com  
**t** +44(0) 330 343 8000  
**e** hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at [www.oneadvanced.com/legal-privacy](http://www.oneadvanced.com/legal-privacy).

## Identify clients quickly

Legal Portal integrates with GB Group's IDScan to enhance the self-service ethos of Legal Portal.

This allows your client to take a picture of their driving licence or passport and capture a selfie. IDScan then checks the document for its authenticity and can confirm if the individual taking the selfie is actually the person identified in the document.

Results are passed directly back to P4W for the compliance team to review and attach the results to the relevant client record. This reduces the administration required to authenticate and check documents, as well as reducing the risk of inadvertently passing an AML check.

## Display SRA compliance

Expanding on the SRA's Transparency Regulations, Legal Portal provides users with full contact information and biography for the matter fee earner. It does this by allowing hyperlinks to be created to point to your 'About Us' page so users can view fee earner details.

## Measurable benefits

Adapting to the needs of your clients and 3rd parties by providing 24/7, any device access to matter progress strengthens your communication channels and helps to ease the administration burden.

Allowing clients to self-serve, and removing the need for paper-heavy processes, enables your firm to be more profitable and leads to higher levels of client satisfaction and repeat business. These strong advantages are delivered by this innovative, yet simple, communication tool.

**To find out more**  
about the P4W Legal Portal  
please speak to your Account Manager  
**or Contact Us**