

Visualfiles® VisualConvey



“I need to know my case management system will always supply answers to the questions I haven’t yet heard”

Conveyancing is no longer a stand alone operation.
I need flexibility, control and connectivity.

LexisNexis Visualfiles has a hard won reputation for supplying best of breed case management software to conveyancing professionals. Today, nearly 20% of all conveyancing in England & Wales is processed using our technology.

The next generation of our conveyancing software – VisualConvey, has been designed to extend both the software’s inherent capabilities and also its appeal to a much broader cross section of the conveyancing industry.

a future proofed **conveyancing** solution

At a time when all players need to future proof their operations and create distinctive competitive advantage in a dramatically changing market, VisualConvey offers a highly flexible solution. It retains the core selling propositions of its predecessors but crucially provides a gateway to all the integrations necessary in a HIPs and e conveyancing environment whilst also dramatically reducing the time and resource required to implement.

The solution will be available on either a conventional basis or as a transaction priced model.

For more information call **0113 226 2000** or e-mail sales.info@visualfiles.com

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LexisNexis®



This application sets a new standard in conveyancing case management. It is a step change that pulls together in a single application all the diverse elements a conveyancer needs to assemble in order to compete in the future.

Detailed specification

A new platform

VisualConvey has been built using the latest release of Visualfiles which moves the development environment on by introducing the concept of case plans.

Case plans are discrete chunks of workflow that personalise an application to its purpose. These sit on top of generic workflows for common tasks such as file inception and can be introduced, amended or withdrawn without impacting on the remainder of the solution. In short, case plans mean that VisualConvey becomes a dynamic and highly flexible design environment.

Integration

Faced with a bewildering array of current and future integration requirements with HMRC, the Land Registry, search providers, title insurers, clients, panel managers, HIP providers and verifiers of ID to name but a few, VisualConvey includes a Gateway that will offer users a single link out to all these organisations.

The Gateway will receive, hold and translate data if necessary, in order to submit requests from within VisualConvey and receive data back into the application from third parties.

Process automation

Our celebrated workflow, based on its entity relationship model together with document assembly and automated production using robots mean that the process efficiencies that are the trademarks of LexisNexis Visualfiles sit at the heart of VisualConvey.

Users still have 'to do' lists that sit across their entire caseload which are a powerful tool when managing and automating tasks.

Product extensions

- **A prospect management solution** that allows a firm to manage the workflow associated with quoting for business and following up with prospects in order to convert them to clients.
- **An online front end** that means conveyancers can give introducers an online quotation and instruction form as well as case tracking and management reports.
- **An online client questionnaire** issued automatically to all clients with an e-mail address that takes them to a web form where they complete a questionnaire which is then loaded into VisualConvey and displayed.

Content extensions

VisualConvey comes with a complete set of default documentation and letter templates that mean users can quickly move into a live environment with the ability to include bespoke drafting based on user experience.

- **Leasehold** content has been comprehensively revamped to include considerably more detail around the leasehold process including apportionments.
- **The completion statement**, again, comprehensively revised to manage all likely scenarios. It now has the flexibility to include various legal fees, leasehold apportionments and fees due from previously aborted transactions.
- **A legal report on title** that sets out in a single document all the reporting dimensions a conveyancer needs to present to their client with clear, easy to follow instructions around what actions are now required by the client.
- **A suite of management reports** available as standard that delivers an incisive overview of key business metrics.

Presentation

- **Dashboard:** We have built a dashboard that offers individual users or more usefully, managing solicitors a snapshot of key business metrics. At a glance the user can see a graphical representation of cases opened and closed in the last 6 months; escalated matter alerts on individual cases and a pie chart of the results of the online questionnaire.
- **Outlook integration:** Targetted at the partner or solicitor more comfortable with an Outlook backdrop, VisualConvey is available as an integral element of Outlook.