

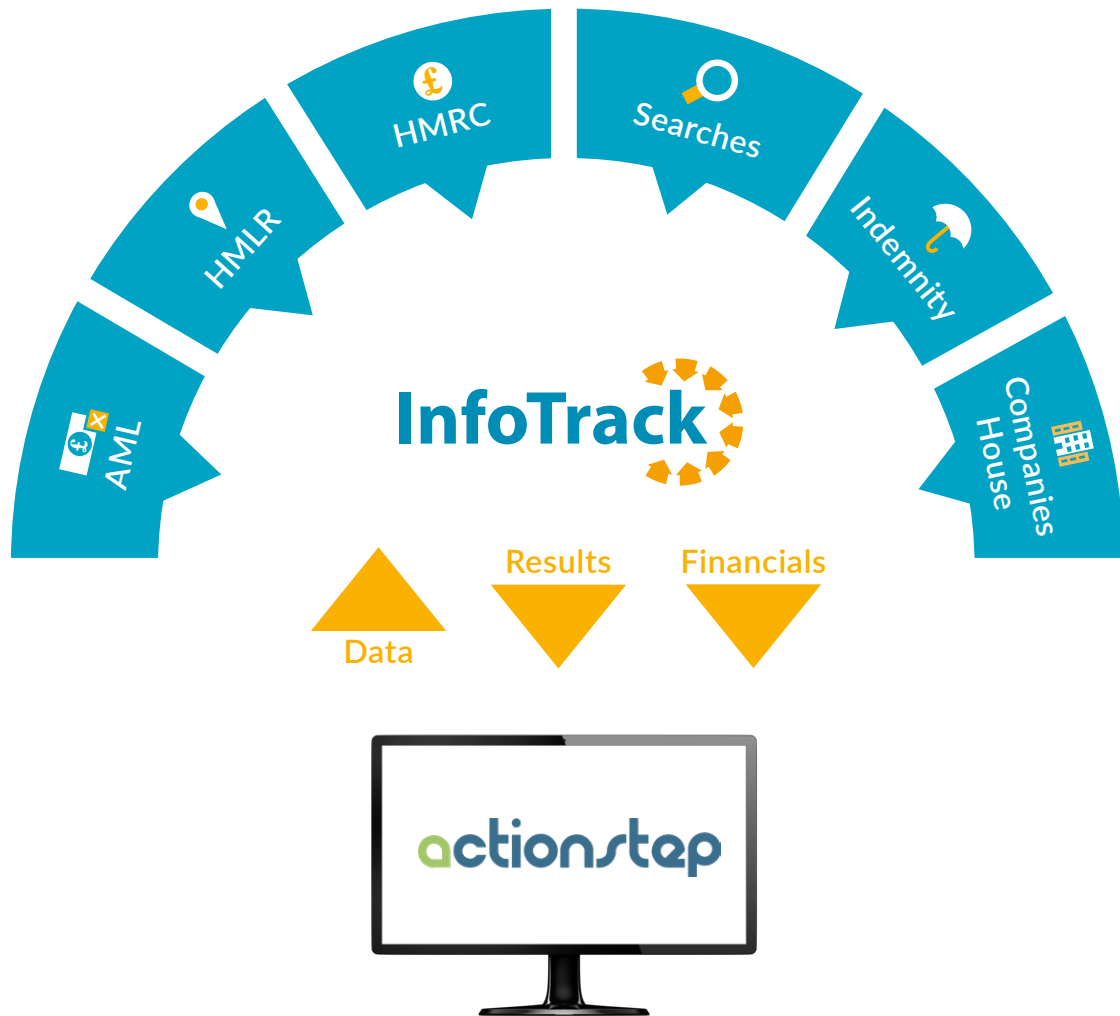
Integrating InfoTrack and Actionstep

Faster, efficient conveyancing
with integrated services from
InfoTrack, harnessing the
power of Actionstep



InfoTrack
actionstep

How InfoTrack and Actionstep integrate



“Using InfoTrack and Actionstep has enabled our firm to streamline the conveyancing process making us more efficient. The integration works very well and is highly recommended.”

**Claire Ward, Licensed Conveyancer,
Director, Hanslip Ward & Company Ltd**

HANSLIP WARD
AND COMPANY LTD

Immediate access to InfoTrack at the click of a button within Actionstep. Your credentials will be automatically entered. Below are several key features of our powerful integration with Actionstep.

Pre-population of data

- With automatic population of data direct from Actionstep 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 Actionstep.

Document Return

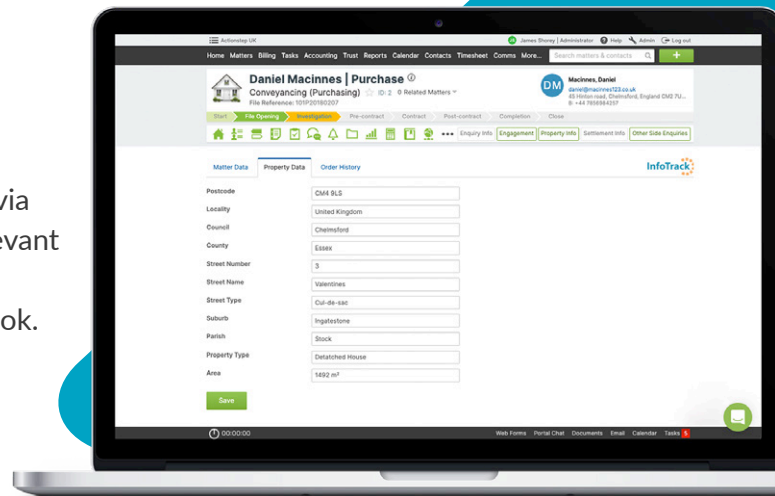
Any searches, documents or information ordered via InfoTrack will be automatically attached to the relevant matter. No need to copy and paste, or risk losing documents within your downloads folder or Outlook.

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.

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.



Compliance

- **Minimise risk and improve efficiency** – we eliminate the need to copy and paste from multiple sources, with data pulled directly from Actionstep.
- **Keep on top of compliance** – with our quickly accessible reports from MI-InfoTrack.
- **GDPR friendly** – we help you take care of GDPR as information is automatically connected to matters within Actionstep.

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.

Services offered by InfoTrack

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
- AP1 applications, unique dashboard and requisition tool
- Indemnities
- Quoting Tool

Companies

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



actionstep

www.actionstep.com
sales@actionstep.com
0203 955 7666

InfoTrack

www.infotrack.co.uk
sales@infotrack.co.uk
0207 186 8090