

Integrating InfoTrack And Clio

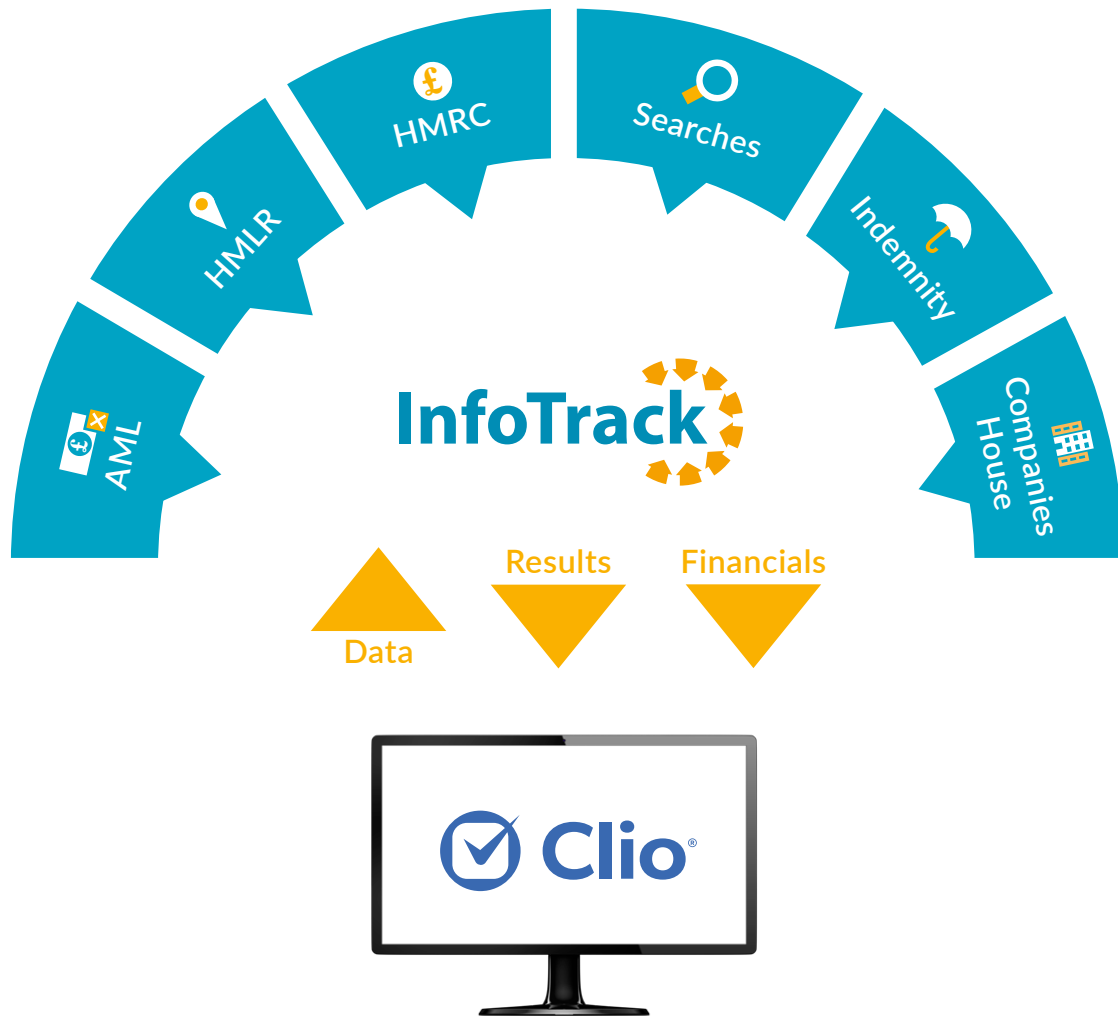
Faster, efficient conveyancing
with integrated services from
InfoTrack, harnessing the
power of Clio



InfoTrack

 **Clio**[®]

How InfoTrack and Clio integrate



“The firm has been highly impressed by the integration of the InfoTrack system with Clio. It is working seamlessly and is backed up by superb support from the InfoTrack team, should you ever need assistance. The integration has certainly saved time for all users.”

**Iain Lorrimer, Partner,
Solomons Solicitors**



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

Pre-population of data

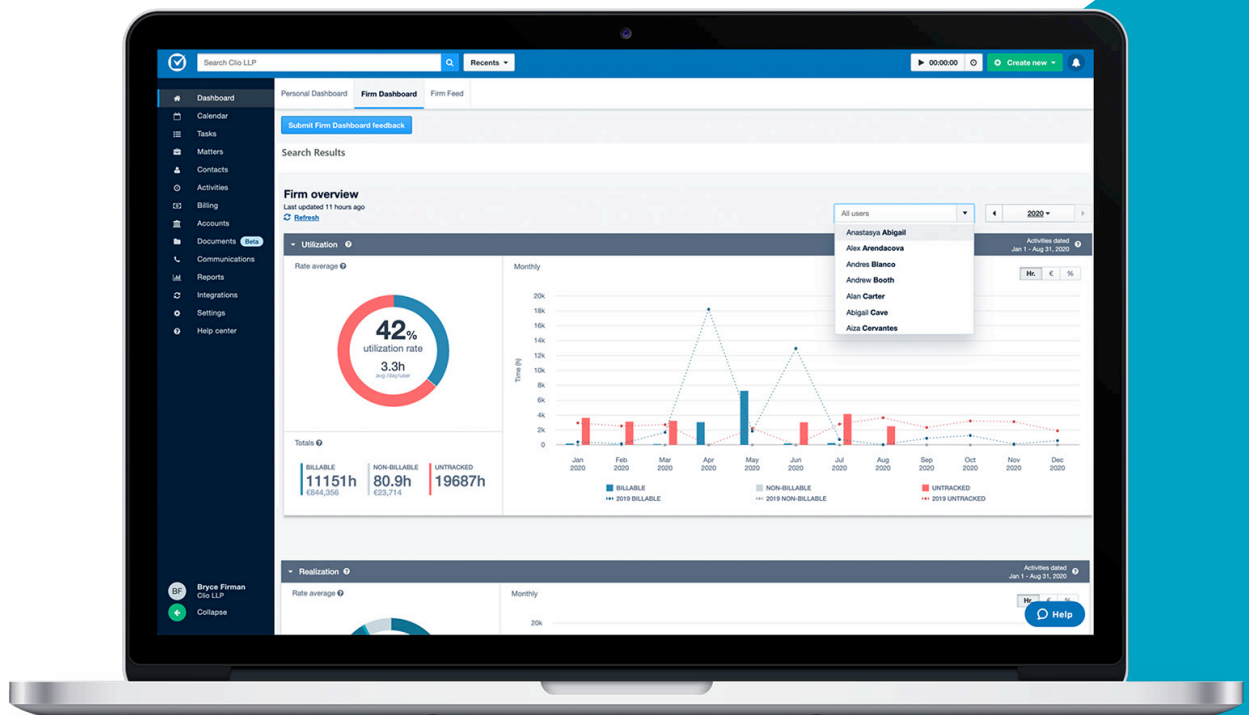
- With automatic population of data direct from Clio into InfoTrack, this single source of truth minimises the risk associated with using multiple systems, enhancing compliance across your firm and eliminating time spent re-keying.
- All relevant fields are mapped with information pulled directly from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

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.



To activate your free account immediately, just call us on 0207 186 8090 or visit www.infotrack.co.uk

Compliance

- **Minimise risk and improve efficiency** – we eliminate the need to copy and paste from multiple sources, with data pulled directly from Clio.
- **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 Clio.

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)



www.clio.com/uk
sales@clio.com
0800 433 2546



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