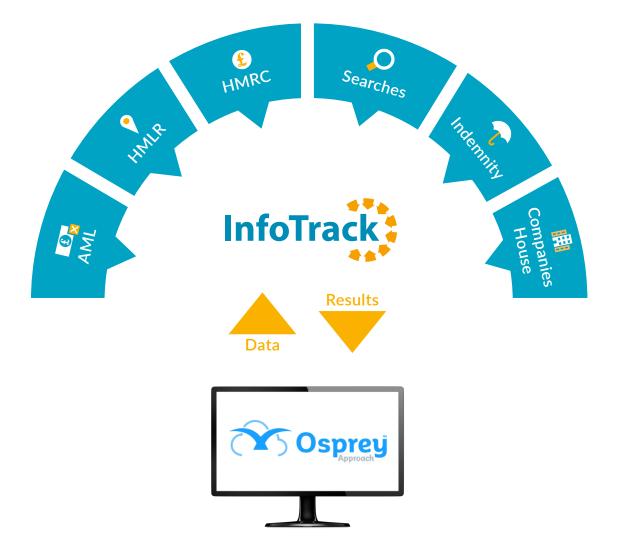
Integrating InfoTrack and Osprey Approach

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





How InfoTrack and Osprey Approach integrate



"We have recently undertaken integration with Osprey and InfoTrack and the whole process was very quick and easy to implement. Since doing so the time savings on our firm are unreal. No more keying in duplicate information which in itself is eliminating errors. We love it!"

> Jamie Connolly, Director, Thomas Flavell & Sons Solicitors

> > TFS THOMAS FLAVELL + SONS SOLICITORS

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

Pre-population of data

- With automatic population of data direct from Osprey 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 Osprey.

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.

Automated Workflows

Reduce workloads, standardise processes, and increase efficiency when you combine InfoTrack with Osprey's automated workflows. The configurable workflows automate key tasks within a conveyancing process to ensure consistency and mitigate the risk of human error, so you can deliver quality, cost-effective service to your clients. InfoTrack services are integrated into the Osprey automated workflows so you can work smarter to reduce manual admin and rekeying data to improve accuracy and productivity.

Home	Workflow Status Search Results	Bar							0
Case Management	-								
-		APPED MATTER DETAILS							
Client Ledgers		Matter Type Pardase v PROPERTY DETALS							
Contacts	Title Number	ABC123456	Property C	ouncil Stoke-on-Trent					
Crganisations	Address								
Case Bundle	Building Name		Street Nun	1711	Street Na	me Leek Road			
Packages	Town	Stoke-on-Trent	County	Staffordshire	Post Cod	e ST2 7AA			
	Street Address	1711, Leek Road, Stoke-on-T							
InfoTrack	Purchase Price	650000.00	Deposit Pr		Balance	Price			
C Time Recording	Exchange Date			ge date confirmed?					
	Settlement Date 22/10/2820 III Settlement date confirmed? V PURCHASER DETAILS								
	Title	Mr	Forename	Mark	Surname	Jameson			
	Second Name		National Insurance Nu	NR987424E	Date Of Birth	13/06/1989	83		
	Phone		Email	praccticedemo@gmail.com					
	Company Name	Jameson							
A	Address								
Help	Building Name		Street Number	43 Isabel Hill Close	Street Name		I'm Posit, your virtu	al assistant! Please, tell me wha	t you want to do
Sign Out									
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Compliance

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

Support

- Dedicated helpdesk our team supports all integrations and works hard to give you first-time fixes, with an 86% firsttime 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
- Property enquiries
- Property Report
- Digital Transfer

Companies

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







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