∧advanced

Cloud Forms
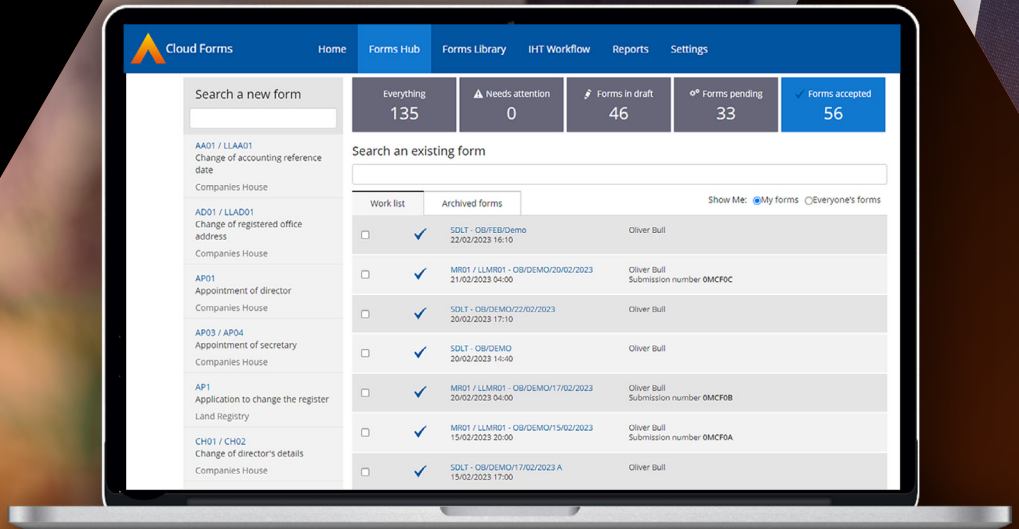# The all-in-one digital forms solution

Boost your firm's productivity and manage costs with a leaner, more efficient business solution that's based on operational funding rather than capital expenditure
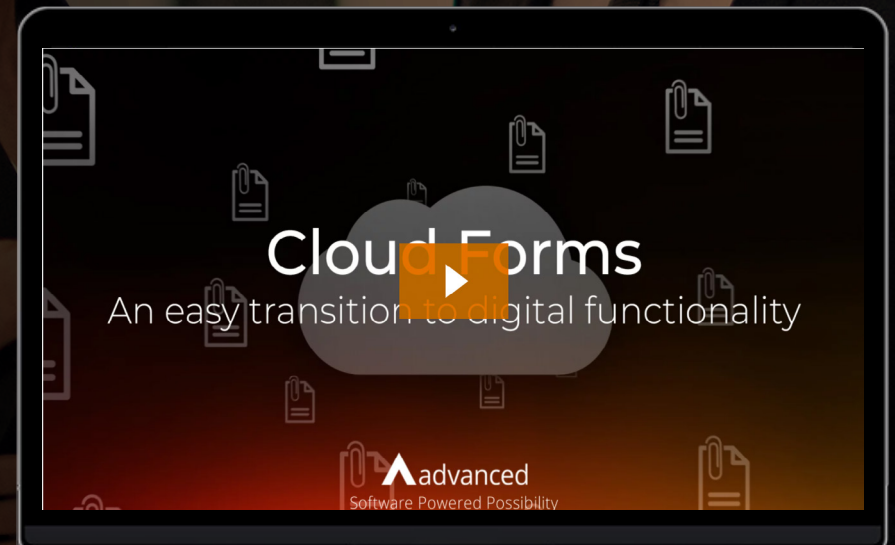
OVERVIEW

Contents

A clear, simple pathway to digital forms

This truly futureproof solution offers users an innovative selection of form features. It was specifically developed to help growing firms meet operational requirements, while ensuring user efficiency, security, and compliance.
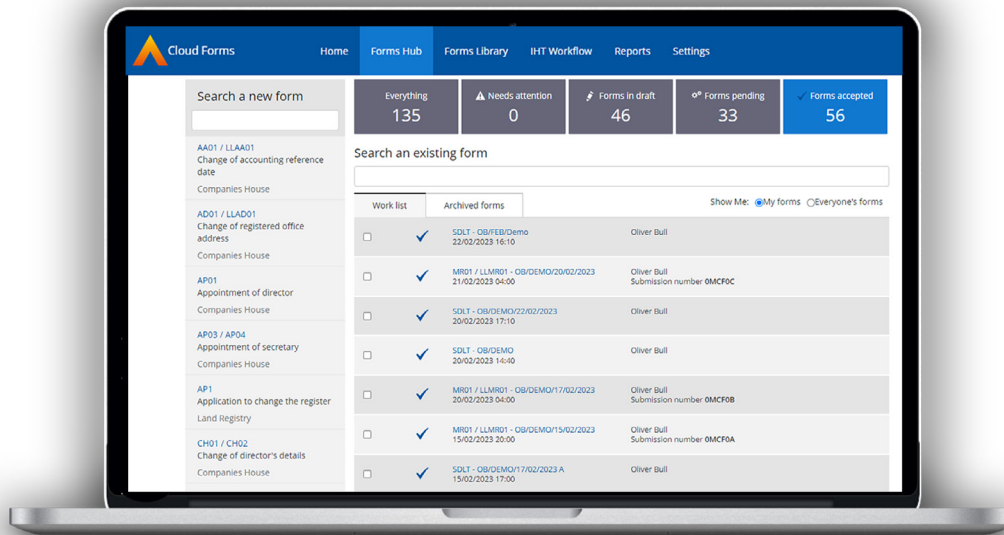
- Easy transition for current desktop software users, with an intuitive, modern UI and minimal training requirement

- Simple rollout, no local installations and users can get started straight away

- 24/7 availability from any web enabled device

- Automated, time-saving functionalities improve accuracy and performance

- Fully managed submission process

- Enforced compliance in line with governance structures

- Safeguarded by the latest security technology and the highest levels of expertise

- Built-in API and an open policy for integration with other software solutions

- Demonstrates a high level of control and efficiency to third parties like insurers, The Solicitors Regulation Authority, and accreditation schemes

Cloud Forms

An easy transition to digital functionality

∧advanced

Software Powered Possibility

Ease of use and 24/7 availability

Enable your teams to work more efficiently anywhere, any time.

All Cloud Forms users need is internet access and a browser to make remote working and seamless collaboration smooth and easy.

- A comprehensive library of over 2,000 forms

- Integrated submissions platform and digital forms

- Fast, secure access with single login

- Powerful search and navigation capability, with smart searching that surfaces frequently used forms quickly

- Files that are in-process or completed are auto-saved to the Cloud platform, ensuring no data is lost if there's an internet or power outage

- Allows secure, easy form sharing with both colleagues and clients

- Drag and drop required form attachments, and preview before submission

- Cloud Forms includes searchable online help and a single, support number to ring if further assistance is needed

- System users can be easily added, removed or updated as requirements change

- Our expert editorial team make all required form revisions before they're uploaded automatically to your library

Automated functionality

Cloud Forms offers users a level of automation that surpasses all the benefits of traditional desktop software. Specifically designed to prevent commonplace form issues and errors, the platform ensures every user has the document they need, in the correct format, instantly at their fingertips.

- Automated complex calculations save time and reduce the risk of user error
- Expand, or add, rows to ensure there's sufficient room for all required data
- Form versioning errors are prevented as all users have access to the same up to date templates
- Linked forms can be saved together as one file
- Records both time and user identification of all activity, providing a comprehensive audit trail for every document
- APIs enable automated data pre-population of data from case management, document or workflow software
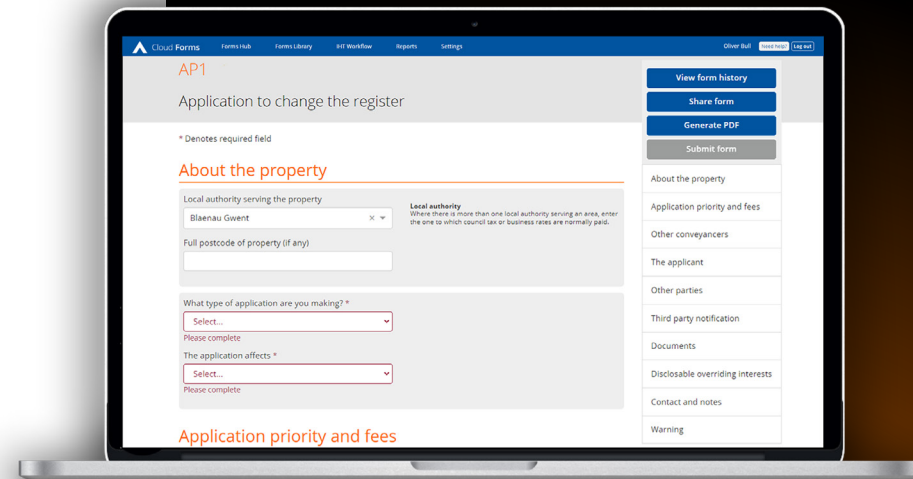
87%
of UK law jobs now offer some level of remote working

47%
say risk management is a growing concern

74%
of law firms believe digital technology improves their service quality

Managed digital submission

The Cloud Forms Hub allows you to control, and eliminate, the common barriers that hinder correct, successful form submission. By making online submissions quick and secure, your firm can reduce risk and increase accountability.
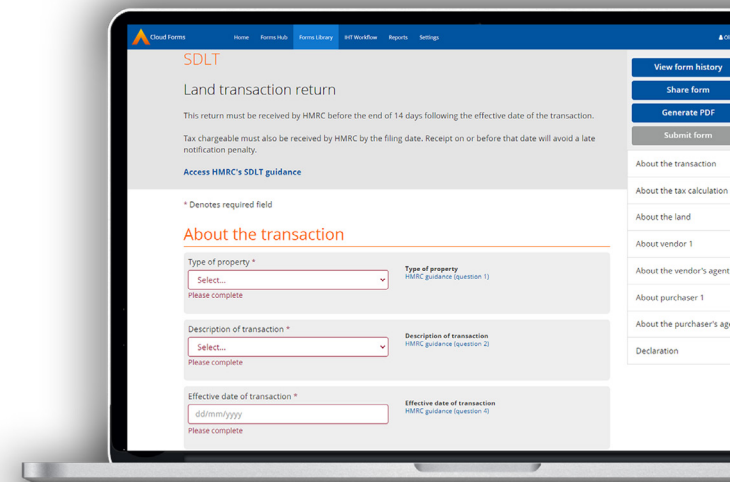
Using this platform, you can send digital submissions directly to:

✓ Companies House (mortgage, company secretarial and persons of significant control filings)

✓ HMRC for Stamp Duty

✓ Land Registry

Digital submission doesn't just reduce form completion times, The Hub also manages compliance and offers the benefit of valuable reporting information.

- Drag and drop all required submission documents

- Digital forms can be easily shared, allowing pre-approved authorisers to review and sign-off all information before submission

- Submission is only allowed once the data is confirmed as valid, reducing rejection rates

- If transmission is interrupted, your submission will be delivered as soon as the service resumes

- The entire submission process, including the management of crucial deadlines, is supervised automatically with live progress reporting

- A full audit trail is available for every submission

- Csv download of disbursements incurred, can be sent directly to your finance team

The future development of the Cloud Forms Hub will continue in line with the release of new digital channels by the relevant government agencies. When further forms move to digital, we'll be on hand to manage the transition for you.

GLAISYERS **ETL** GLOBAL

"When you compare the form collaboration cycles of Laserform and Cloud Forms, the business driver for change becomes very obvious. Five years ago, we wouldn't have thought forms could be this flexible."

Sean Edwards
Business Analyst, Glaisyers LLP
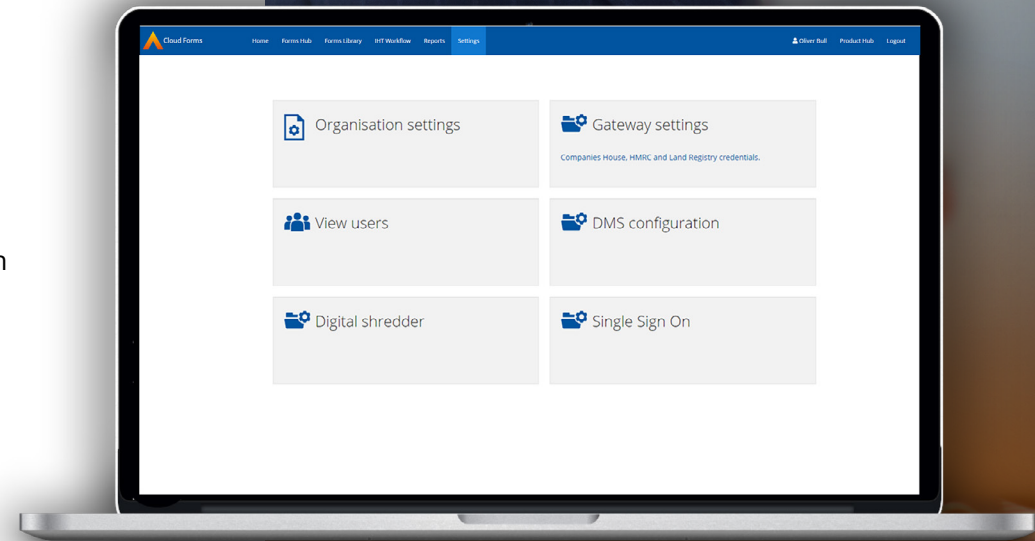
Read the full case study

Security and compliance

Risk management

Protect your firm, and your clients, with a system that enforces best practice and helps ensure on-going success.

- Establish and maintain full compliance in line with governance structures by enforcing standards with customisable data entry rules and saved text

- Allow supervisory oversight of collaborative work to ensure compliance

- In-process or completed files are auto-saved in the Cloud to ensure no data is lost

- Comprehensive surveillance features include full form histories, audit trails and reporting

- Review and analyse captured information to understand where common errors occur

- A digital shredder assists with the management of data protection compliance

- Developed with the capability to meet GDPR, SRA, SAR, LAA and Law Society regulations

Assured protection

Cloud Forms are safeguarded by the latest security technology and the highest levels of expertise. Whether you suffer a cyberattack, experience fire or flood or lose your laptop, your documents are always protected and accessible.
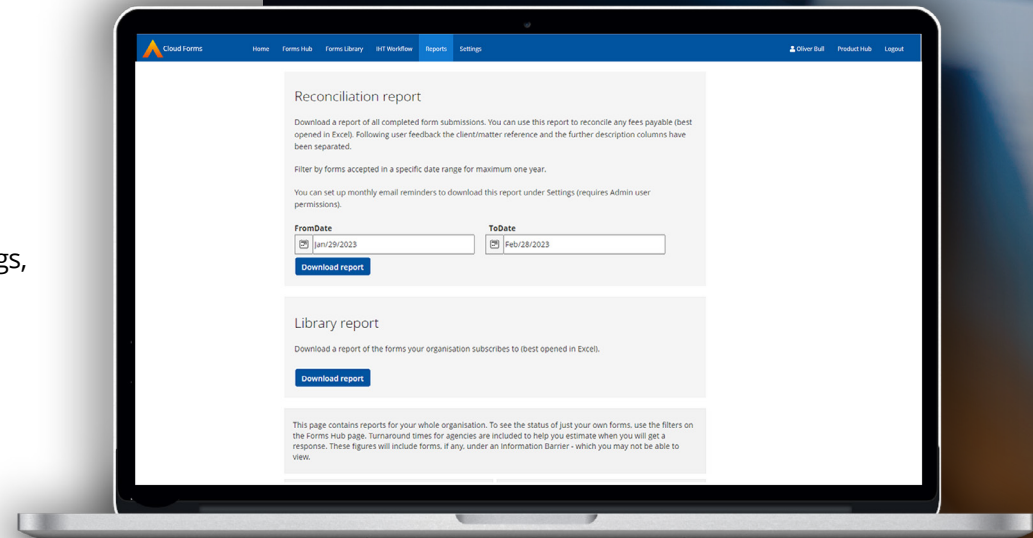
- All forms are held in AWS Cloud storage which has ISO and other international standards in place to assure you of our commitment to the security of your documents.

- Automated system backups ensure all data remains secure and available

- Data is encrypted prior to transmission, hosted over two high-security locations, and transferred via HTTPS

- Centrally controlled user access and password management

- Advanced subjects Cloud Forms to regular internal security testing using the latest automated tools

- Single Sign On (SSO) allows secure, seamless sign in and improved compliance

Cost efficiency

Cloud Forms offers your firm measurable cost reductions and efficiency improvements. It does this by reducing running costs, boosting productivity, and providing the competitive edge that enterprise-class Cloud technology offers to firms of all sizes.

- Eliminate all of the costs associated with servers and software upgrade charges

- Remove requirement for costly, rarely used, back-up and recovery hardware

- Reduce the burden of system management by eliminating the time needed to roll out, store, upgrade, manage and maintain forms software onsite

- Replace time-consuming, paper-heavy work processes to decrease operating costs

- Form submission costs are attributable to the matter they were incurred for, allowing you to move software cost from an IT overhead to a department spend

- Automate accounts information, never miss disbursement postings, achieve easy reconciliation of fees

- Pre-population for integrated forms saves re-keying data, saving time and risk of errors

- Analyse reports to see where, and why, costly errors occur to prevent future occurrences
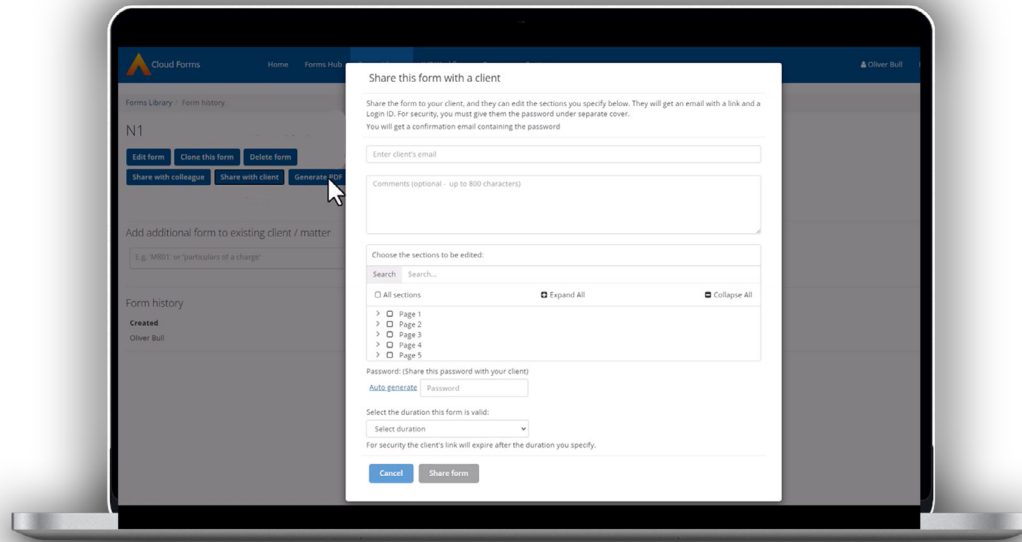
Client Collaboration

Technology has changed client expectations. With Client Collaboration, you can make them a part of matter progression - providing a better client experience and easing the pressure on your fee earners. All the recipient requires to receive the form is an email address and a PC browser.

- Your teams can share legal forms directly, and securely, with colleagues and any authorised clients or third parties

- Clients can complete forms from the location where they hold the required information, removing the need to re-key information that's gained during client conversations

- Usage instructions that show clients how to complete the form easily can be included

- Control the form fields a client can edit, and set usage time limits to ensure fast turnaround

- Notify clients that a form is ready to fill in by sending an email with a password protected link to the form

- Clients can access the form as many times as they need to, within the duration specified

- Automatic form completion notifications let fee earners know when a form is ready to progress

- The Client Collaboration module is available on all subscribed forms

The IHT400 Workflow

This time saving workflow offers busy probate and private client practitioners all of the forms related to a full HMRC inheritance tax account (commonly known as the IHT400 forms). It allows all required forms and schedules to be individually selected and linked as one intelligent file, simplifying production of the full account for HM Revenue & Customs.

- Fully customisable so you can add or remove relevant schedules for each matter

- A linked navigation panel takes users quickly to all required forms and schedules

- Add as many supplemental schedules as needed

- Work on multiple forms and schedules simultaneously

- Automated complex calculations ensure accurate completion of forms

- Print all linked forms and schedules in one batch

- Access up to date HMRC guidance using direct links to their website

- Electronically access all rates and tables, including thresholds for nil rate band amount for previous years to save time when moving between files

- Automatic population of practice and matter details on supplemental forms
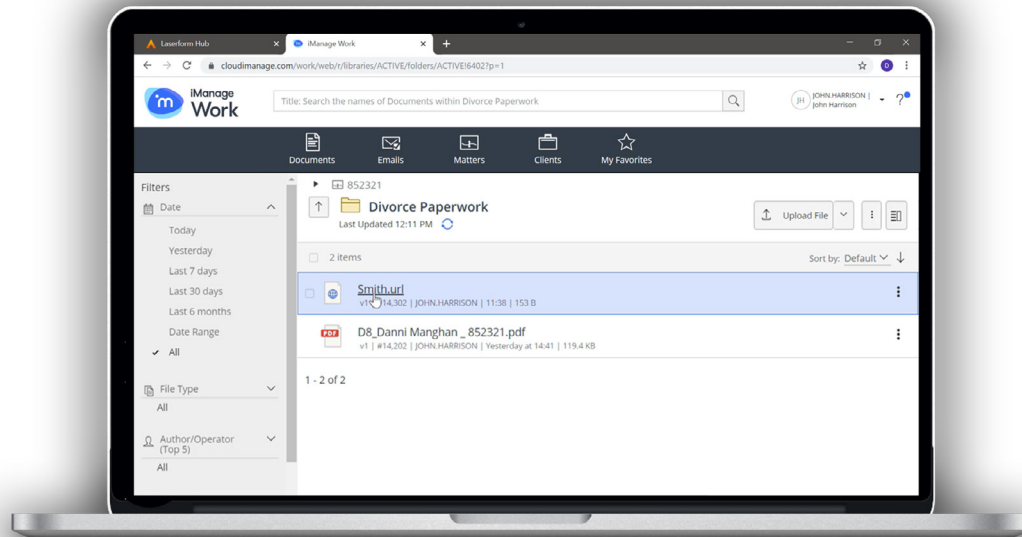
The Cloud Forms iManage integration

iManage is an intelligent, cloud-enabled and secure knowledge work platform that enables organisations to uncover and activate the knowledge that exists inside their business content and communications.

Integrating your Cloud Forms package with this market-leading platform will help you quickly store, organise, and access your forms within a wider firm context, and allow your teams to create and collaborate easily.

- Complete legal forms in a familiar work environment

- Automatically save forms, and edit them, through iManage

- iManage works in the background of Cloud Forms, enabling you to link forms directly to your document management system

- When creating a form, the initial creation page looks similar to the iManage set-up that users are already familiar with

- Forms can be quickly saved within the related client or matter file

- This integration can be quickly switched on by a Cloud Forms administrator

"Deployment was straightforward, forms are much easier to update, and we have improved accessibility for remote working."

Simon Davies, IT Integration Specialist
Verly Hulin, Project Manager
Natalie Cottle, Service Transition Specialist

Read the full case study

∧advanced

Join the 6200+ users who depended on Cloud Forms to successfully complete 32,000+ digital submissions last year

If you'd like to discover more about how Cloud Forms can deliver higher form efficiency to your firm, please get in touch.

Find out more

📞 +44(0) 330 343 4000   🖱 www.oneadvanced.com   ✉ hello@oneadvanced.com