



**mattercentre**  
simple matters

# Automated Conveyancing Workflow Solution



# Streamline your conveyancing process with our **automated workflow solution**

Embrace the future of conveyancer with our cloud based platform and protect the future of your firm



# What is workflow automation?

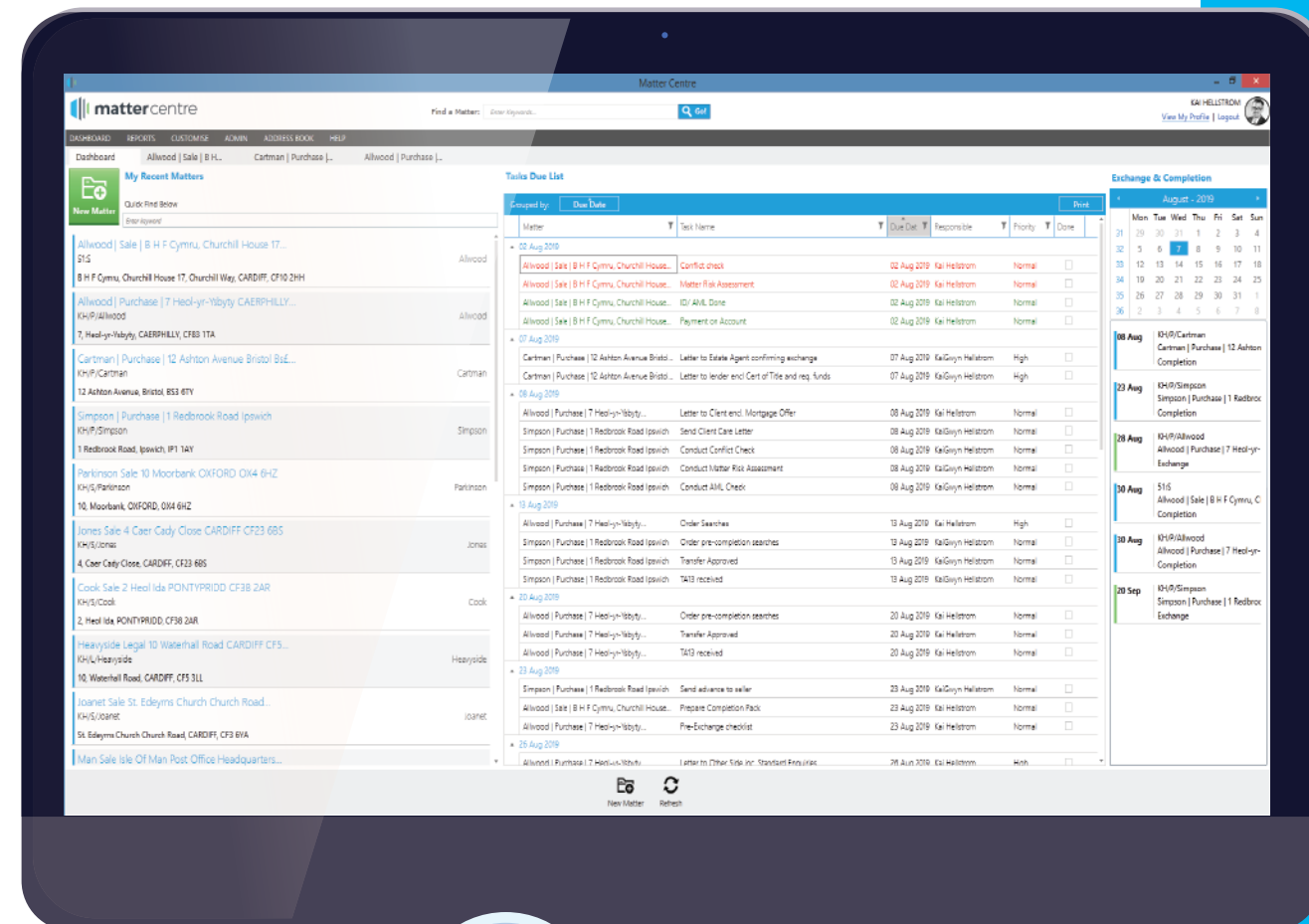
Conveyancers are facing an ever increasing demand on their time with increasing regulatory requirements and client expectations while the margins are being squeezed.

The last few years has seen a reduction in the number of conveyancing firms as they try and deal with this increased pressure.

Automation offers conveyancers the opportunity to reduce the amount of administrative work they do so they can focus on more important tasks delivering greater value.

Through the use of automation, information entered into a system can be reused to populate document, search enquiries and even SDLT submissions.

Not only does this save you time but it also reduces the amount of manual errors made and time spent on corrections.



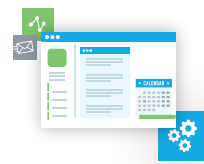
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As conveyancing becomes more commoditised, automation will allow conveyancers to expand their practice without putting increased pressure on existing resources.”

Kai Hellstrom,  
Product Manager  
GlobalX



# Key features



## Fully customisable workflows

Unify your processes with automated workflows that generate tasks and reminders for any kind of conveyancing transaction.



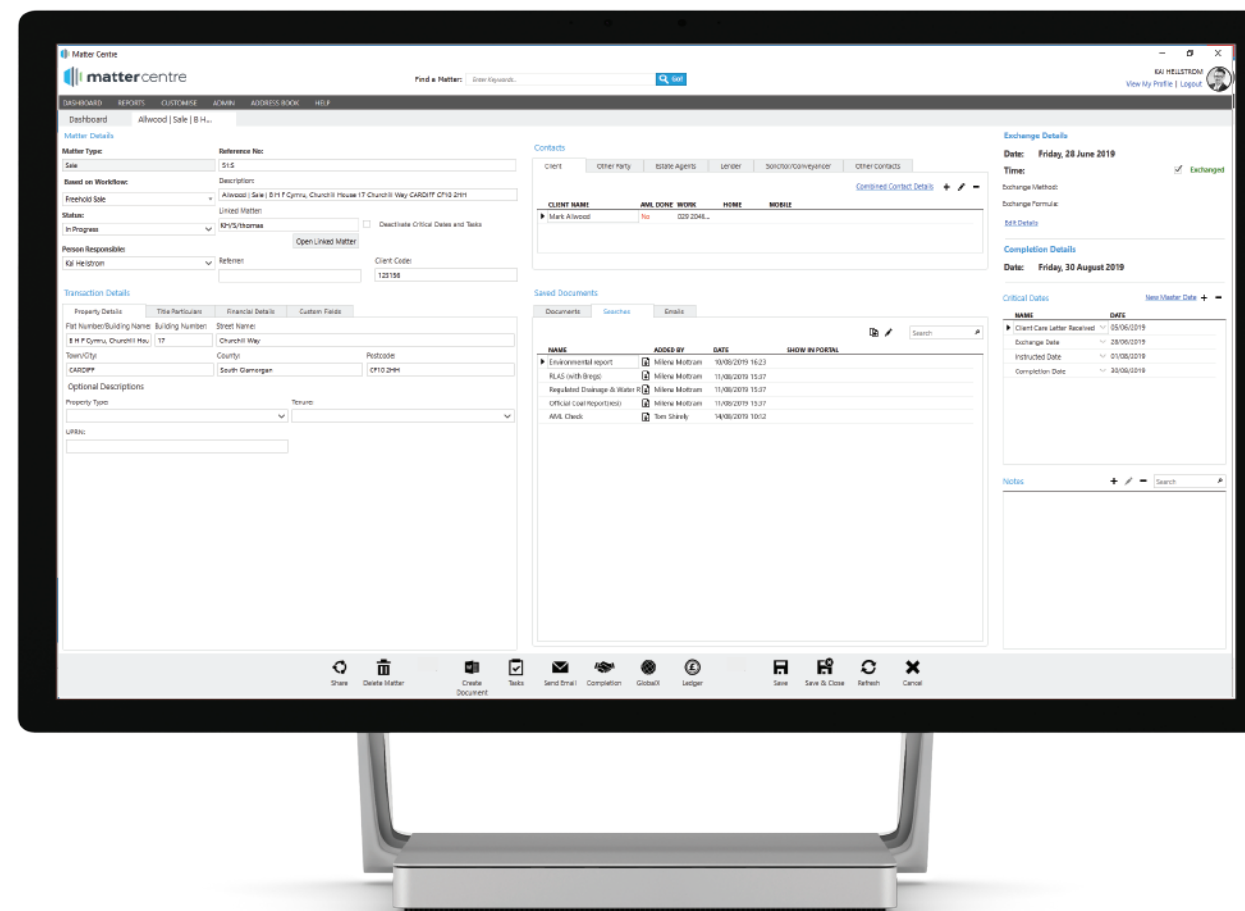
## Auto-populated forms & documents

Never rekey information again. Data captured during the transaction can be used to populate correspondence and forms designed to your requirements.



## GlobalX search integration

Order your property searches from within the system and have the documents returned straight to the associated matter without any manual intervention



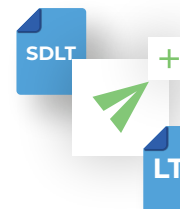
## Microsoft Outlook & Word integration

Use the tools you're used to. Save, edit and send emails and documents directly to and from the matter



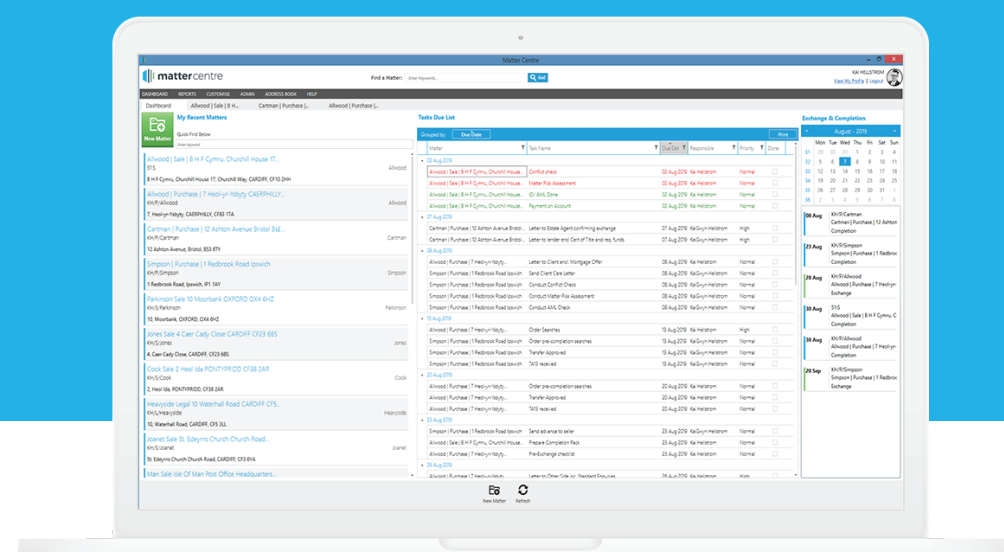
## Land Reg Title integration

Matter Centre directly connects to the Land Registry so you can order a wide range of searches and receive documents back within seconds.



## SDLT & LTT integration

Stamp Duty Land Tax submissions doesn't have to be taxing! On average conveyancers save 10 minutes per submission with our integration



# All features

## Matter Management

From contact management, to completion statements to client communication and search ordering – Matter Centre does it all. Our easy to use interface lets you manage the whole matter from one screen, making everything you need available at a glance.

## Quotation Integration

Matter Centre has its own online quotation tool but can also integrate with other options on the market

## Document Conversion

Easily combine and convert multiple documents into a single PDF with our drag and drop interface. All auto-populated letters are automatically converted to PDF before being emailed out making things that little be easier.

## Custom Matter Types

Matter Centre can handle held any transaction type not just conveyancing with custom workflows and associated documentation

## Dynamic Reporting

Quickly see the status of all matters across your businesses with our dynamic reporting dashboard. You can filter by month, type, status, team member or a combination of any to get rich insights into your business.

## Task Management

See what tasks are due and which are overdue across matters all from the home screen. Task management is easy with Matter Centre - filter by case, date, priority or person. Tasks are generated automatically by our workflows so you can get on with them instead of managing multiple lists.

## Contact Manager

Manage all your solicitors and suppliers contacts and add them to a matter for easy documentation creation

## Password Protected Matters

Control who has access to what matters by creating offices and teams or even assign password to specific matters to ensure compliance with SRA guidance on firms acting for both sides.

## Account Ledger

Easily track incoming and outgoing payments related to a matter

## Accounts Integration

Matter Centre can integrate with a range of accountancy packages allow for easy reconciliation of matter details

## Email Templates

Create your own library of standard emails templates that will automatically be saved to the matter and sent from your Outlook account

## Auto-generated Completions Statements

Generate completion statements at the click of a button using the data



# Why choose Matter Centre

## Software + Searches + Superior Service

Matter Centre is more than just software. It's the combined expertise and knowledge of GlobalIX's 30 years+ experience of serving the legal community.

Unlike practice management systems, Matter Centre has been built to meet the specific needs of UK conveyancers by conveyancers. It's been designed based on the feedback and input of our clients to solve the challenges they face daily.

When you order your searches through Matter Centre you can be confident that you'll get back accurate results without delay from our award-winning service team.

## Work anywhere, anytime

### Conveyancing in the cloud

With just a laptop and internet connection, you can conduct conveyancing transactions from anywhere at any time.

You'll have full access to all of your matters, open or closed, related documents and any communications. You'll be able to see what everyone is currently working on, what's overdue and what needs chasing.

Move your conveyancing to the cloud and the benefit of centralising your document library including all templated letters, documents and forms.

## No Servers To Keep Secure

### Enterprise Grade Cloud-Based Security

With conveyancers a key target for cyber criminals managing your own servers and keeping them secure can be a big burden (and a big bill).

As a Cyber Essential Plus accredited business, you can put your trust in our Enterprise Grade Cloud Conveyancing Software.

We understand the importance of keeping data safe and secure which is why we've built our system on top of Microsoft's Azure cloud platform.

Microsoft's enterprise grade platform comes with advanced security to protect against cyber-attacks and all your data is stored here in the UK to be compliant with data protection rules.

## Put Compliance On Cruise Control

### Control Your Documents And Client Data

Utilising Matter Centre's powerful features, you can create a robust environment that ensures company procedures and policies are followed.

Automated workflows ensure that each, and every case, follows the same exact procedure with complete transparency of who did what while making changes to processes a breeze.

With our centrally controlled document library, you can be confident that only the most current documents leave the office.

Your client's data is securely segregated and can be locked down so its only accessible by specified users, offices or teams.

## Pricing That Won't Hold You Back

### Grow Your Business Without Growing IT Costs

Conveyancers shouldn't be held back by their software. Rather than expensive per user or per case fees, we offer unlimited plans for a low monthly fee.

We don't do complex pricing or contracts. Instead we offer a simple, single competitive price that can save firms thousands of pounds, a year increasing their profitability.

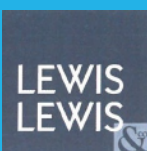
We also offer exclusive plans for those that partner with us on the Property Searches.

And as a cloud-based solution, you'll get all updates and new features free of charge.



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We started using Matter Centre in July of this year and from the beginning it made life a lot easier. From opening files to drafting documents, Matter Centre makes life simpler. The ability to see all important information on one page and the task list ensures that you can always keep up to date on your matters in a quick and easy way. The amount of time saved using Matter Centre is incredible”.



## Arrange a demo

Visit [www.globalx.co/matter-centre-enquiries](http://www.globalx.co/matter-centre-enquiries) to arrange an online demo at suitable time or call us on **0800 197 1757**



