

Integrations guide.

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About Us



WE WANT TO MAKE LAWYERS' LIVES EASIER THROUGH THE SMARTER USE OF TECHNOLOGY.

Founded in 2004 as a case management consultancy, Zylpha released its first product in 2007.

Since then the company has continued to develop software for the legal profession with the sole aim of automating manual processes, removing errors, reducing cost and minimising risk to the practice.

We stay true to our consultancy heritage by managing, implementing and supporting development projects within both SolCase™ and Visualfiles™. We do this for clients globally.

WHO WE ARE

We are a small business of 12 talented IT professionals who are based just outside of Winchester, Hampshire.

WHAT WE DO

We write software for the legal sector, integrations for case management and document management systems and deliver consultancy along with improvement and implementation projects.



OUR CLIENTS

Our clients are either law firms, local authority legal teams or legal departments within large organisations. In the last few years we have been working with law firms outside of the UK too.

TECHNOLOGY PARTNERS

We are proud to be official technology partners with some of the most innovative and talented organisations that help to support the legal sector.



Adobe Sign



LexisNexis®



iManage



PayPal



Peppermint
Technology



SOS
INNOVATE AND EVOLVE

LDMglobal

Personalized Discovery Solutions

Official
Technology
Partners

Our Values

WE WANT TO DELIVER QUALITY PRODUCTS THAT OUR CLIENTS ARE HAPPY WITH, SO THAT THEY STAY AS CLIENTS.



BE PROUD OF WHAT WE DO

We like to solve the problems, that legal teams experience on a daily basis, through developing effective solutions for use in case management systems. Our focus is to remove as much administration from the legal process as possible, enabling lawyers to focus on the important stuff.

OUR PERSONALITY

NO BUZZWORDS

We don't reach out, salute flag poles or open kimonos - we do try and use clear and concise language where appropriate and provide updates regularly.

A FRIENDLY APPROACH

We like to provide a friendly, supportive service to our clients. However, don't expect robots that are not going to understand the nuances of your organisation.





OUR PEOPLE

We recruit people who have either technical or legal expertise and who fit our 'Client First' work ethic.



OUR CLIENTS

We work with firms and organisations of all sizes, who all have the same desire to enhance their systems.



SUPPORT

We believe that when things go wrong you want to speak to someone who knows what they are doing.



WE CELEBRATE SUCCESS

Some large companies just move on to the next paying project as soon as possible regardless of the outcome. At Zylpha however, we like to celebrate the success of a completed project as we know that the work carried out will have made a difference to the client that we have been working for.

OUR COMPANY IN NUMBERS

500+



PROJECTS COMPLETED

In 12 years, we have successfully completed over 500 projects for our clients.

100+



ACTIVE CLIENTS

We have over 100 active clients who continue to trust us and utilise our services.

50+



AWARD WINNING CLIENTS

Many of our clients have gone on to win critical acclaim on the back of projects we have completed.



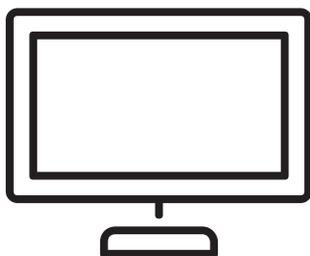
Document Bundling



CREATING PAPER BASED BUNDLES IS A TIME CONSUMING, STRESSFUL AND UNPLEASANT EXPERIENCE.

With our innovative software in place, photocopying, hand pagination and manual typing of the index are now a thing of the past. By eliminating these time consuming parts of the administrative process, you can build bundles that are

free of errors and at a fraction of the time normally taken. Our systems are designed to make your life easier and give you back control and means no more late nights, courier costs or archive boxes full of paper bundles.



CUSTOMISE TO YOUR HEART'S CONTENT.

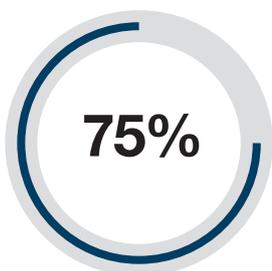
With Zylpha you are completely in control of what the software does at the click of a button. You can build the electronic bundle in the way you want without compromising on the integrity of your documents.

MORE THAN JUST COURT BUNDLES.

Many of our clients use our software to produce board packs, contract packs, marketing reports, training guides, and more without needing additional software.

About our Bundling Software

SINCE BEING LAUNCHED IN 2007, OUR BUNDLING SOFTWARE HAS GONE FROM STRENGTH TO STRENGTH MAKING IT THE EASY CHOICE WHEN MOVING AWAY FROM PAPER BUNDLES.



COST SAVING

On average clients using our electronic document bundling software save over 70% compared to their manual document bundling processes.



CLIENT SATISFACTION

In our latest satisfaction survey our electronic document bundling software achieved a satisfaction rating of over 91% making it the number one product.



TIME SAVING

Zylpha electronic document bundles take minutes to produce rather than the hours normally associated with the task. This frees staff to work on other projects.

REGULARLY UPDATES AND NEW FEATURES

We constantly look for new and exciting features to add to our bundling software. Every new enhancement must make it easier to build bundles or help to remove the stress and pressure normally associated with bundling.



EASY TO USE, AND ROBUST

Built by lawyers for use by lawyers. It can handle large bundles yet user friendly and can be learnt in just minutes.



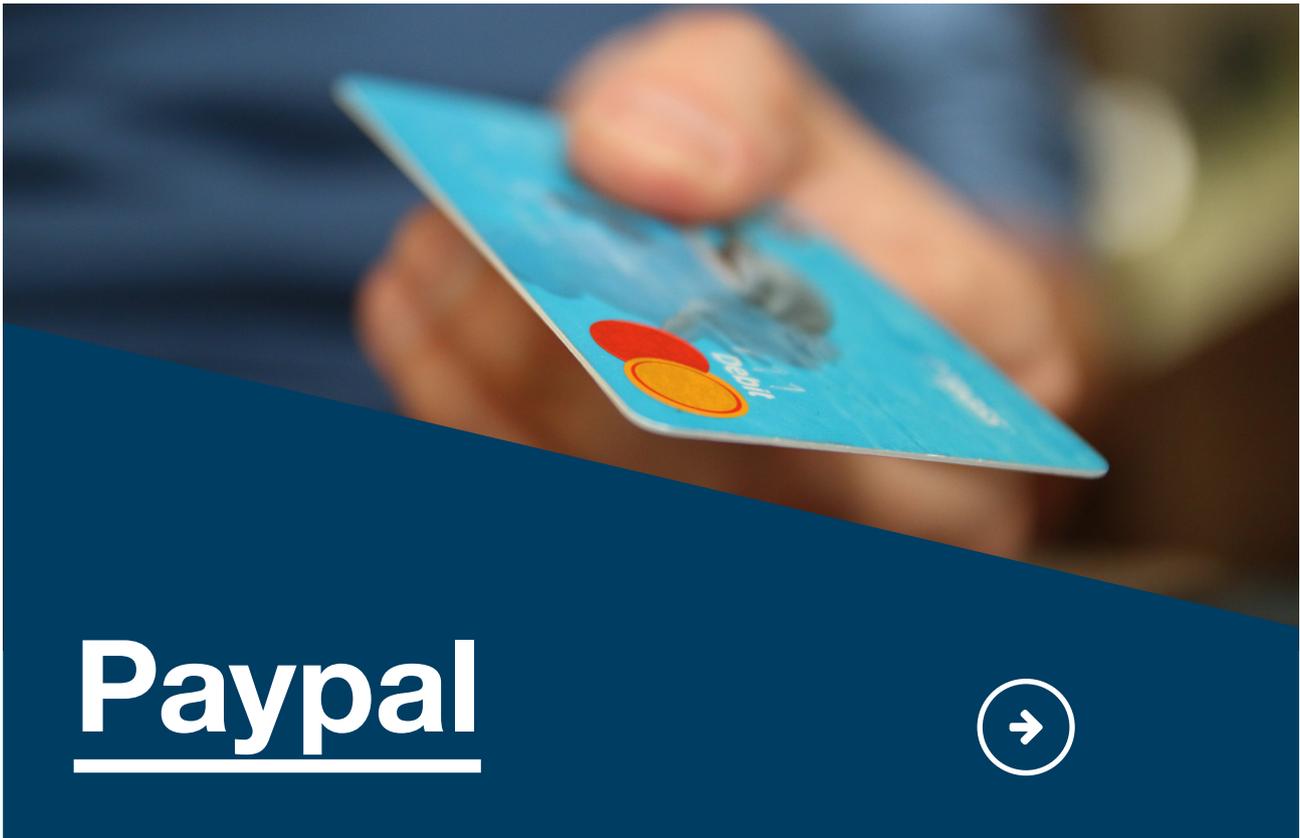
LEGAL SYSTEM AGNOSTIC

Access your documents and folders, regardless of whether they are on your computer, your server, CMS or DMS.



TRIED AND TESTED ACROSS THE UK

Used daily by law firms, local authority legal teams, corporate legal teams and Government departments



GET PAYMENTS FASTER FROM YOUR CLIENTS USING PAYPAL – A REPUTABLE BRAND NAME THAT THEY KNOW, LIKE AND TRUST.

Whether it is for disbursements or legal fees, getting money from clients is still one of the most frustrating and time consuming parts of the administrative legal process.

This is especially true when you add in the highly frustrating time delays from chasing outstanding payments and putting matters on hold until they are received.

Chasing a client for payment (regardless of whether it is for fees or disbursements) is a waste of your lawyers' time, and completely inefficient.

With scam artists targeting law firms and their clients as easy pickings, it's left a sizable problem for law firms to address with a solution.

Unfortunately, many proposed solutions are unmanageable, too difficult for clients to work with, or just inadequate in any modern law firm that is trying to protect its reputation.



With Zylpha's PayPal integration it is possible to request payments directly from within your system and notified when the payment has been received. There's no more chasing clients. Interestingly though, it appears that many clients quite like to pay through PayPal too.

Choosing PayPal provides greater flexibility too as your clients can pay you by PayPal, debit card or credit card and the secure PayPal checkout button is embedded into all your email invoices. Your clients can pay you in a couple of clicks, whether they have a PayPal account or not.

Our PayPal integration also plays nicely with others. Combine it with Adobe Sign to send out client instruction forms and take payments at the same time. Clients get the speedy professional service that they want, you get client sign up and payments faster.

PayPal is a trusted global brand used daily by your clients. In fact, PayPal is the UK's number one online and mobile payment method.

Key Benefits

GLOBALLY TRUSTED BRAND NAME.

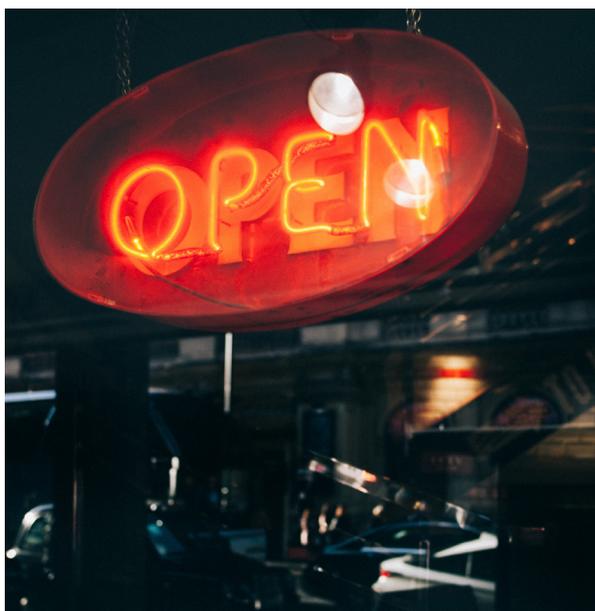
Why risk your reputation with a payment tool that your client might not know. Surely, only the best is good enough and PayPal is the number one trusted payment tool used by small and medium businesses. If you use it, it will be popular with your clients too.

FASTER PAYMENTS.

Your clients don't need to enter their debit or credit card details and other information if they already have a PayPal account. If they don't have a PayPal account, then can either sign up or pay direct to you by card. It's quick, easy and painless.

REDUCE WAITING TIME.

Time spent waiting for monies on account is time wasted and avoidable. You can move much faster by getting clients to use PayPal, allowing you to progress their case efficiently whilst the competition is waiting for a cheque.



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Available for:
Visualfiles
SolCase



Electronic Signatures



PRINTING AND SENDING DOCUMENTS SLOWS EVERYTHING DOWN. BRING YOUR CASES BACK UP TO SPEED WITH ADOBE SIGN.

Sending documents for signature through the post or DX significantly slows down the progress as you wait for it to be delivered, signed and then returned. Add in time pressures, cost, security or brand perception and it is

easy to see why many of the UK's brightest law firms are now adopting electronic signatures, as well as updating their internal processes to better leverage the full capabilities of eSignature technology.

In this ultra-competitive legal services marketplace, it can be a considerable source of frustration when a prospective client has chosen another firm in the meantime, especially if you have gone through the trouble of sending them out comprehensive documents to sign and opened a file in readiness. All that time, money and effort gone to waste.

So why not stack the odds in your favour by getting your documents to the front of the queue with electronic signatures. This leaves the competition way behind as they continue to struggle to get paper documents returned.



Adobe Sign

With Zylpha's Adobe Sign integration there is no need to wait for the post/DX to arrive, and it is proven to reduce the amount of incomplete returned documents and compress the time taken to complete a matter. The immediacy also boosts your client experience greatly as they can sign documents on the go using their computer, tablet or smart phone.

Whatever you need to get signed, make it a faster, better experience with eSignatures. Adobe Sign is the world's top eSign solution. And it's as easy to deploy as it is to use. It's the electronic signature provider of choice for Zylpha because of its easy-to-use system, great support and reputable brand name.

Adobe Sign is also so much more than just getting electronic signatures. Use it to send out detailed forms such as your client instruction form, medical records form of authority or Seller's Property Information Form. Once completed electronically these can be recorded back into your existing system automatically.

It can also be used for sending documents to your own staff such as employee contracts, staff handbook updates, technical questionnaires and much more.

With electronic signatures from Adobe Sign and Zylpha's integration you are only limited by your imagination.



Key Benefits

SEND FROM WITHIN YOUR SYSTEM

You can send documents to be signed from within your existing systems. You can prepopulate fields with data that you have from within your system, speeding up the process and impressing your client from the start.

SIGN ON ANY DEVICE.

Complete forms and sign them by computer, tablet or phone. No specialist software is needed to view the documents and forms can be started on one device and then completed on another.

REDUCE WAITING TIME.

Reduce timescales by compressing the amount of waiting for documents to arrive. Clients receive documents the day you send them, potentially saving weeks on returned documents.

Available for:
Visualfiles
SolCase
iManage



Letterhead & PDF utilities



ADD YOUR BRANDING TO DOCUMENTS, CONVERT FILES TO PDF, ADD PASSWORDS AND MUCH MORE FROM ONE ADD-IN.

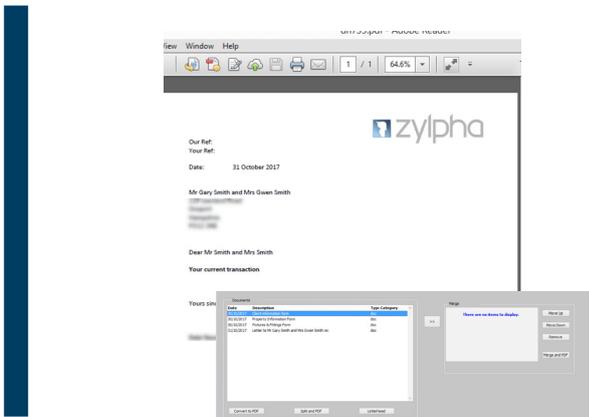
Our letterhead and PDF utilities add-in, brings additional functionality to your Visualfiles system that your users will enjoy. At the heart of the add-in is the ability to take a document from your case history, convert it to PDF, add

your firm's details and logo and also add a password to the final PDF (if required).

This functionality makes it straightforward to email PDF documents to clients at the click of a button without having to leave Visualfiles. As standard functionality all documents converted using the letterhead functionality are added automatically back to the case history saving the user time throughout the process.

Documents do not need to be sent just to clients, but can also be sent internally as PDF protecting the integrity of the original document.

The add-in also includes additional functions such as splitting pages out of an existing document and also the ability to merge documents into a single file.





Postcode Anywhere



THE SIMPLE WAY TO CHECK POSTCODES AND ADD ADDRESSES TO YOUR VISUALFILES MATTERS.

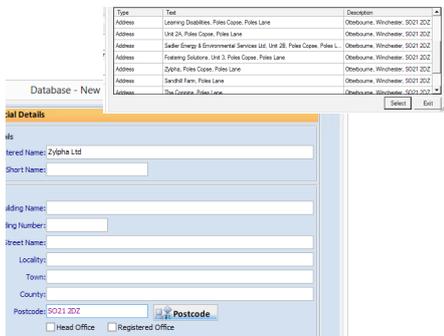
When it comes to creating a new client matter, every second counts. That's why we developed our Postcode Anywhere integration - to make manual data entry of addresses a thing of the past.

Creating the right first impression with your client can make all the difference when dealing with their matter, something as simple as an incorrectly typed address or postcode can make all the difference in the client's mind as to whether you can be trusted.

Our Postcode Anywhere integration searches against a daily updated list of addresses not just from the UK but across the world, benefiting not just your UK clients.

This cost effective integration combines the expertise of Zylpha's integrations team backed by the pedigree of Postcode Anywhere's market pioneering postcode product.

Our postcode anywhere integration removes the chance of erroneous data in your case management system, protects the perception that your client has of your firm.





REQUEST INFORMATION AND SUBMIT REGISTRATIONS TO THE LAND REGISTRY AT THE CLICK OF A BUTTON.

LAND REGISTRY INTEGRATION

The Land Registry business gateway makes it easy for organisations who regularly request information from

HMLR to get information or submit application online. Our Land Registry Business Gateway integration now makes it easier for Visualfiles case management system users to submit requests and have all relevant information returned to them and then automatically stored back within Visualfiles.

Business
Gateway



The integration covers a range of different search types that are available from the Land Registry and like many of our other integrations removes time consuming, error prone administration from the property legal process.

Use our Land Registry integration on its own, or with other add-ins or work flows to complement or enhance your existing processes within Visualfiles.

Key Benefits:

REDUCE COSTS AND REMOVE MANUAL DATA ENTRY.

Using the business gateway is cheaper than requesting by post, but with our integration you also save time costs due to reduced manual data entry.

IMPROVE SPEED, CERTAINTY & ACCURACY.

When copy typing data into your case management system there is a greater risk of erroneous data being added. By automatically parsing data from the Land Registry to your system, this increases accuracy which can help speed up your matter both delighting your client, and you being able to invoice the client faster.

FULL PORTAL FUNCTIONALITY

As more functionality is added to the HM Land Registry Business Gateway our tools will be updated to include these new fields, processes and searches.



EDRS INTEGRATION

The Government's electronic document registration service is designed to provide an easy to use online process that dramatically speeds up the process whilst reducing the cost by up to 50%.

However, you still have to take the information and input the data into the government portal. Our solution extracts the data from your database and automatically processes the data into the eDRS portal format and delivers the information in seconds.

This new process enhances the benefits of speed and costs of registration by reducing the labour costs whilst ensuring greater accuracy.

Key Benefits:

Reduce average end-to end processing times.

Reduce postage/DX costs and manual processing costs

Cut back on paper consumption

Available for:
Visualfiles
SolCase



ANTI MONEY LAUNDERING VERIFICATION SYSTEM THAT BRINGS INDIVIDUAL SEARCHES INTO YOUR VISUALFILES ENVIRONMENT.

Anti-money laundering regulations are something that legal professionals have become accustomed to carrying out, as non-compliance brings with it heavy financial penalties or even imprisonment.

The need to demonstrate satisfactory verification for each client or beneficial owner can take a great deal of time, adding additional cost and time delays.

Our widely acclaimed anti-money laundering tool, powered by SmartSearch, benefits from the very latest technology which unites an infinite group of firms, users and locations with the common purpose of fulfilling their AML regulatory obligations in the most efficient manner possible.

The very latest technology delivers an unrivalled user experience to over 1,750 client firms and around 25,000 users, enabling them to comply with the latest 2017 Anti Money Laundering (AML) Regulations and fulfil their AML, Customer Due Diligence (CDD) and Know Your Customer (KYC) compliance obligations.

With no requirement for clients to provide identity



documents, the “SmartSearch Way” is much more convenient for your clients and more cost effective for your Firm. From start to finish an Individual AML check takes less than 30 seconds and a Business AML check takes less than 3 minutes, including automatic Sanction & PEP screening.

With just one click, AML checks can be carried out, with the results being returned directly into your existing system. Each check also provides a PDF report which it is also able to add to the history of that client/matter. SmartSearch gives you complete functionality required to process any type of AML search all from a single and easy to use platform.

Real-time hosting of all your businesses search activity and AML outcomes enables you to recall on-demand any AML outcomes to support an internal audit or an external visit from your regulator. A flexible search budget means you can select any type of search plan to suite your budget.

Utilising our AML check integration provides a clear audit trail with results that are both transparent and easy to understand.



Key Benefits

FASTER CHECKS.

Carry out AML checks with one click of a button. This significantly reduces the amount of time it takes to complete your AML checks when compared to manual paper-based AML checks.

CONTAINED IN VISUALFILES.

As the AML checks are electronic, they have a digital footprint which means that they are both auditable and can be both stored and accessed from within your Visualfiles case management system.

ONE SOLUTION.

Our AML SmartSearch integration provides both individual and business AML checks. This eliminates the problems of using separate systems, or complicated processes.

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Available for:
Visualfiles
SolCase



Client Matter Inception

A FREE ADD-IN FOR VISUALFILES TO MAKE IT EASIER TO COMPLY WITH CLIENT MATTER INCEPTION (CMI) PROCESSES.

Our Client Matter Inception (CMI) add-in is an easy-to-use tool that collates information from different parts of your system, making it easy to see if your client is compliant with your CMI/KYC processes.

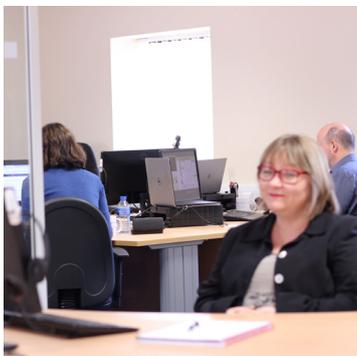
Our CMI tool shows you the outcome of AML checks, payments on account and signed instructions forms from your clients.

These can be mapped against your existing tools and add-ins or can be combined with our electronic signatures, AML checks and PayPal add-ins.

As the add-in generates its own data, it makes it easier than ever to see which files are noncompliant, how long they have been open and who needs additional training.

Many of our clients also use the tool to schedule email notices to department heads or fee earners so they are aware of non-compliant matters.

The CMI add-in is completely free for you to use whenever and however you wish.



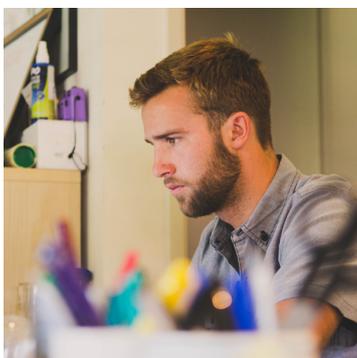


EL/PL & RTA Portal



THE EASY WAY TO SUBMIT AND MANAGE CASES THROUGH THE MOJ PORTAL FOR EL/PL & RTA CLAIMS.

The MOJ RTA Claims Portal went live in 2010 to streamline and speed up the processing of low cost Road Traffic Accident claims within the 15-day time limit.



With over 500,000 claims per annum and 500 organisations already using the MOJ Portal Software, it has rapidly become the logical approach to processing claims in the industry. Manual web-based data input is laborious and error prone, which negates many of the advantages of using the Portal. However, users of Zylpha's MOJ portal integrations have the ability to overcome this limitation by using our tools to remain ahead of the competition in this fast-moving market.

It is an automated yet fully customisable integration designed exclusively to process claims rapidly and seamlessly through the Portal, saving you time, effort and cost whilst maximising your margins.

Now in its 7th year, both of our MoJ portal integrations are used daily by some of the largest claimant and defendant legal teams in the UK.

Pricing

INTEGRATIONS ARE EITHER AVAILABLE AS PACKAGES (BELOW) OR AVAILABLE TO PURCHASE SEPARATELY.

PERSONAL INJURY

A package which includes our best selling products designed for high volume personal injury departments and law firms.

INCLUDES:

EL/PL

RTA

ADOBE SIGN

INSTALLATION & TRAINING

CONVEYANCING

Designed for conveyancing professionals who want to remove unnecessary administration from their workflow and get to exchange faster.

INCLUDES:

LAND REGISTRY

EDRS

ADOBE SIGN

ADOBE FORMS PACKAGE

INSTALLATION & TRAINING

CMI/KYC

Built to speed up the CMI/KYC process and enhance your existing processes.

INCLUDES:

CMI ADD IN

SMARTSEARCH

PAYPAL

INSTALLATION & TRAINING

£17,600PA

£17,600PA

£11,700PA

DOCUMENT BUNDLING PRICES

Please contact us direct to discuss our document bundling prices as these are based on the volume of licences and also your integration needs.

THIRD PARTY COSTS

Many of our integrations will be subject to third party costs. Further information available on request. Please contact us for further details.

Integration Costs

SYSTEM INTEGRATIONS

Looking to purchase just one integration? Purchase one of our integrations from just £5000 per annum including all updates, maintenance and support. Does not include Smartsearch integration (price below)

**£5000
PER ANNUM PER
INTEGRATION**

INSTALLATION & TRAINING

In addition to an integration there's installation, configuration and training required. On average you should budget for two days per integration to cover this.

£895 PER DAY

SMARTSEARCH INTEGRATION

Our Smartsearch integration is available for a limited time for just £2500 per annum. Installation and training costs priced separately.

**£2500
PER ANNUM**

SYSTEM CUSTOMISATION

Have custom requirements? Speak to our development team today to find out how we can put your ideas into practice within our electronic document bundling software.

**£895
PER DAY**

**WE TAILOR ALL QUOTATIONS TO THE CLIENTS NEEDS.
PLEASE CALL US ON 01962 658 881 FOR YOURS.**

Support

OUR DEDICATED OPERATIONS TEAM IS ON HAND TO SUPPORT YOU WHEN THINGS ARE NOT QUITE AS EXPECTED.



When something is not working the way it should, or you have questions that need answers you want to speak the right people who know what they are talking about.

Our highly experienced operations team who manage the day-to-day support of all of our products are experienced legal IT professionals with a thorough understanding of our software.

We don't want our clients to ever feel that they cannot contact us whether it's about a problem, a question or even a feature request. That's why support is provided 9am to 6pm, Monday to Friday (excluding holidays).

SUPPORT TICKETS

On average we receive 20 support tickets a month. 90% of support tickets are satisfactorily closed in less than five days.

TYPES OF SUPPORT

We provide two different types of support depending on the product, this is either first line support or third party support. If you are not sure which you have, please contact us on support@zylpha.com

Training



WE HAVE A RANGE OF TRAINING TOOLS AVAILABLE FOR OUR CLIENTS ALL DESIGNED TO MAKE IT STRAIGHTFORWARD TO GET UP TO SPEED WITH OUR SOFTWARE.



TRAINING GUIDES

Easy to use training guides on getting started with our software and building bundles.



E-LEARNING VIDEO

We've developed an online video course that can be taken at your own time and pace.



REGULAR WEBINARS

We regularly run webinars for both new and advanced users. Contact us for further details.



ONLINE TRAINING

We can run bespoke online training sessions specific to your needs.

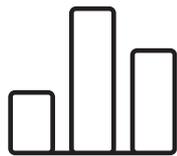


We provide a range of different training materials from guides and manuals through to bespoke training. Contact us for more details and availability.



Onboarding

WE WANT TO MAKE IT EASY AS POSSIBLE TO GET UP AND RUNNING WITH OUR INTEGRATIONS AND SOFTWARE.



**INFORMATION GATHERING
AND RESEARCH**



**DESIGN AND
DEVELOPMENT**

STAGE 1

>>

STAGE 2

INFORMATION GATHERING & RESEARCH

We'll ask you for information on your IT system, case management/document management systems and IT infrastructure to identify any possible issues.

DESIGN & DEVELOPMENT

Based on your requirements our development team may make changes to the bundling software to work with your existing systems and/or infrastructure.



STAGE 1. INFORMATION

You'll need to complete a quick questionnaire which we will have tried to complete as much as possible before sending it over.



STAGE 2. DEVELOPMENT

We might need your input on certain enhancements or ask you to configure system components such as stored procedures used for system integrations.



STAGE 3. TESTING & IMPLEMENTATION

You'll need to set some time aside to install the software on your own system and also to test the release of our software.



STAGE 4. TRAINING

We'll need to agree a training timescale, what kind of training is being delivered, any follow up required and who will be involved. Whilst this is the last stage discussions might begin a lot earlier on.



TESTING AND IMPLEMENTATION



TRAINING

STAGE 3



STAGE 4

TESTING & IMPLEMENTATION

Once we have carried out testing on our system we will deliver the software release and work with your team to get it installed and implemented correctly.

EVALUATION & TRAINING

Once everything is set up correctly we will begin training on the software based on your requirements and what you have purchased.

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SO21 2DZ

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