Case Study – eSignatures & SmartForms for CMS

Virtual Signature iD

ASSISTING WITH THE INTEGRATION OF SMARTSIGN & SMARTFORMS INTO LEXIS NEXIS VISUALFILES

Kerseys SOLICITORS

CHALLENGE

- Kerseys needed to implement an eSignature product that integrated with their case management system

- Initial objectives needed to be considered along with the long terms gains whilst keeping costs to a minimum

- The initial objective was to implement a product in their residential property team, that supported a paper light initiative and speed up and improve the client onboarding experience

- The firm's principles are to offer a service that it is independent to each client enabling them to communicate with the firm how they wish, without developing a warehouse factory feel.

SOLUTION

Kerseys were set up with **Smart**Sign with the following features:

- Doc management dashboard
- Template library
- Signer geo– location request
- eWitnessing
- Third Party Link & Share
- Time stamped audit trail
- Business branding
- Configurable automated notifications
- Address lookup
- Recipient sequencing
- Recipient name check
- 6-digit One Time Password
- Two Factor authentication
- Filled form data return (XML/JSON)

RESULTS

Kerseys onboarding processes have been streamlined whilst retaining the personal, tailored approach important to their customers.

This was possible through the rapid integration of **Smart**Sign into their Lexis Nexis Visualfiles case management system with the help of our integration partner, Zylpha and the creation of a **Smart**forms library, enabling their conveyancing team to automate client inception letters as well as other forms such as the HMLR TR1

"Working in IT there is so much choice and you do get bombarded with sale enquiries and constantly chased as to when will you be ready to proceed but David and Tim did not pressure me or constantly chase me for follow up conversations, they let me take my time and go back to them when I was ready as I said I would."

Trudy Hooper

IT & Business Operations Manager Kerseys Solicitors LLP

zylpha