



iSupport 

Electronic Contract of Sale
eCOS

SignIT 

Integration

REVEAL 

IDfy 

Giving you the gift of time in
New South Wales

InfoTrack 

Giving you the gift of time in New South Wales



The gift of time	5
IDfy - VOI application	9
eCOS - electronic Contract for Sale	11
SignIT - electronic signing wherever you are	13
eSettlement with PEXA	17
ASIC and PPSR reports	21
REVEAL - data visualisation at its best	23
Integration	25
iSupport - next generation HelpDesk	27

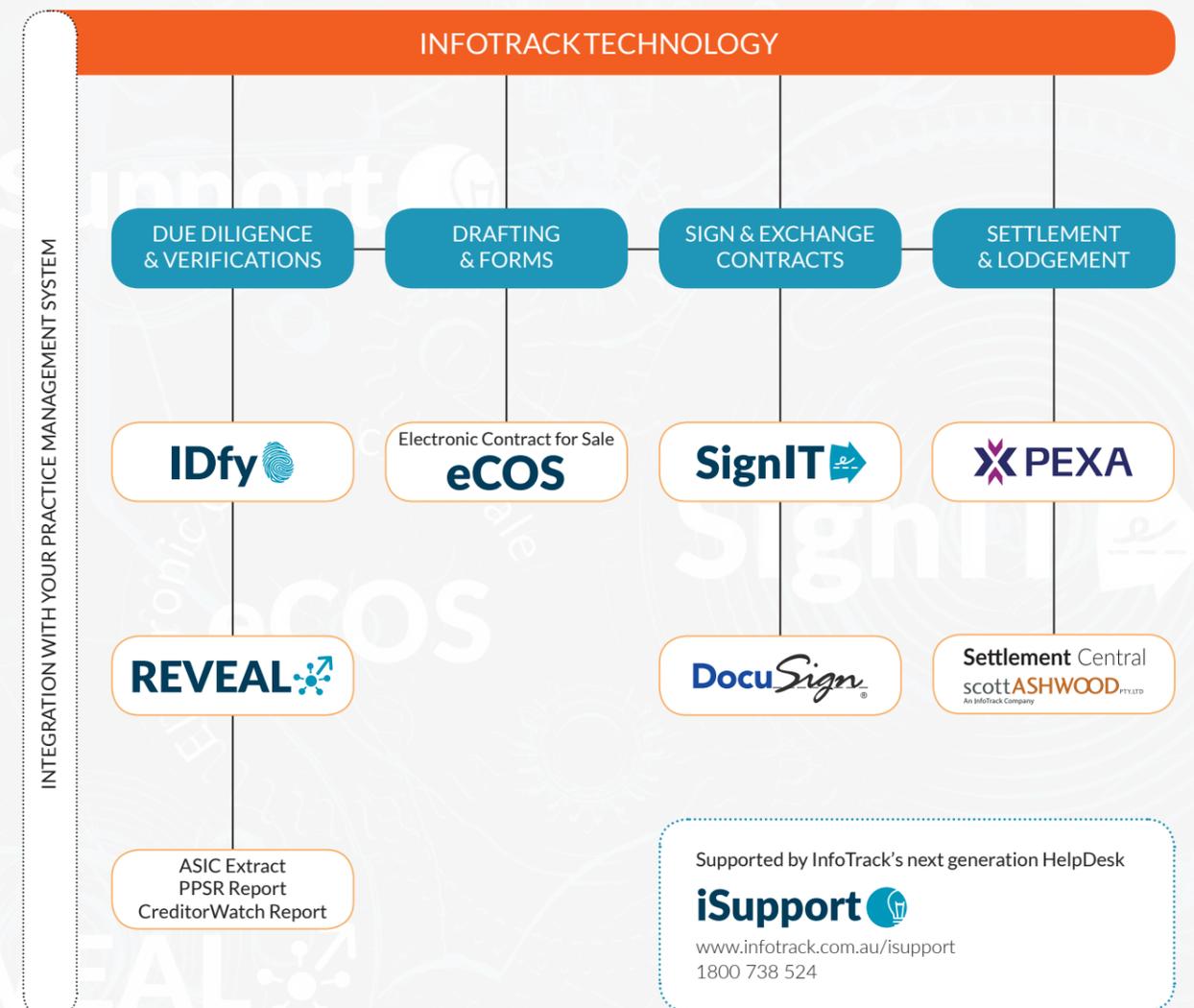


Adopting new technology in the digital era

Australia is going digital and clients expect service that is fast, simple, efficient, transparent and cost-effective. In industries that are steeped in tradition and slow to change, with administrative and manual tasks tedious but necessary, adopting new technology can seem like a daunting challenge for many practitioners.

We help simplify your processes and cut down on the time you spend on everyday tasks, giving you the gift of time so that you can better focus on building new relationships and increasing business.

Our gift of time



At InfoTrack we are innovative disruptors who are constantly shaking up the market and pushing technology and service standards higher. Our technology is not only creating new markets but breaking boundaries and influencing change in behaviours and habits never seen before.

Best of all our technology literally gives back time to our practitioners.

- John Ahern, InfoTrack CEO

The gift of time in action - how we deliver on our promise

InfoTrack connects you with secure and innovative technology that simplifies processes across your practice and helps move your business into the future.

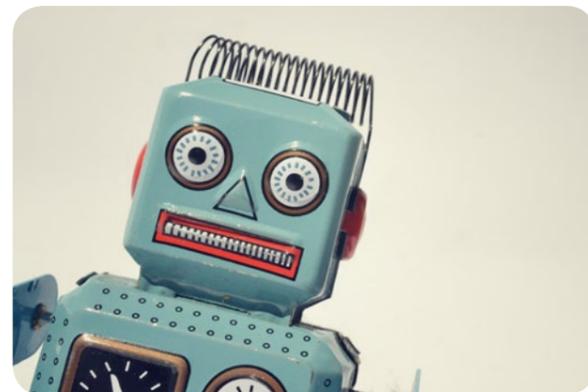


We invest heavily in development

Our development team is 35 strong and growing with all of our development done in-house. Our developers know our clients and products inside out – we never outsource ever and as a result our clients benefit from continuous and swift product developments and enhancements. How else could we release on average 43 features per week?

We customise our solutions

We customise our services for clients – we can integrate into any practice management system and we can switch product features on and off at a client's request, that's how sophisticated we are.



We listen to our clients

We talk to our clients regularly to receive feedback to optimise our technology. Our development and product teams action requests and recommendations within days, if not overnight. We're always in the loop and keep in check with what our clients need – the client is always top of mind. Our team has extensive industry experience and we know the ins and outs of a practitioner's daily life intimately.

We believe automation is key

When it comes to ordering certificates, we have developed in-house technology that automates processes so that 92% of everything that is ordered is automated from time of order to the authority. This allows your workflow to be minimally disrupted so you can get on with your work day.

The modern practitioner

The modern practitioner spends their days juggling files, meeting with clients, researching, drafting documents, chasing certificates, responding to phone and email communications and dealing with administrative tasks.

Our findings revealed a number of common pain points and frustrations faced by today's professional. Every matter is different and they are always waiting on someone or something, whether it's opposing counsel, agents, banks, customer service teams or clients. It's a constant chasing game and time is always of the essence. Managing time and costs can feel like a full-time job on its own. Dealing with difficult clients and authorities can also create frustrations.

Advances in technology have brought efficiencies, but they've also created pressure for transparency and lower costs, leaving professionals busier than ever. Everyone is struggling to do more with less as they strive to differentiate themselves in an increasingly competitive market. This means that every second counts and adopting tools that can save time is essential.

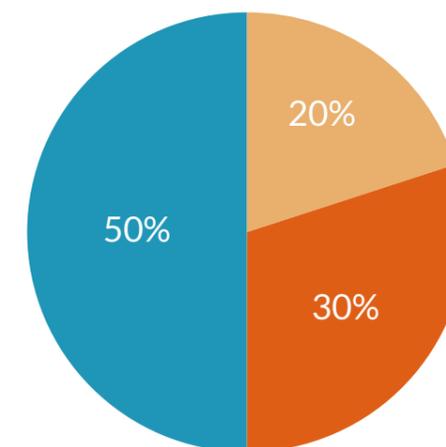
Conveyancer



Solicitor

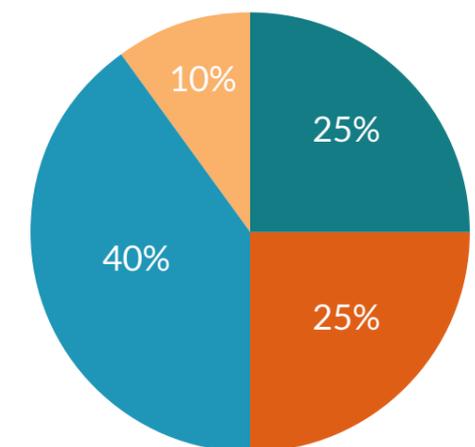


Average time spent on daily tasks



- Conveyancing/contracts
- Client meetings & calls
- Admin

Average time spent on daily tasks



- Admin & drafting
- Client meetings
- Working on files
- Emails

In 2016, InfoTrack conducted a series of independent research interviews with professionals across different industries to get an in-depth look at their day-to-day.



IDfy Verification of Identity

Verification of Identity made simple. Conduct VOI in half the time with IDfy.

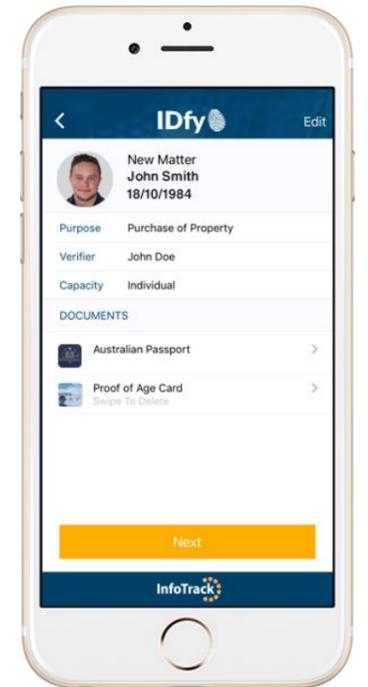
IDfy can be used in-house, out-of-office or remotely, allowing you to complete the VOI process in a few simple steps no matter where your client is. If you and your client cannot meet in-person IDfy has a remote option* that enables you to perform face-to-face VOI via video.

3 easy steps to VOI

1. Take photos of your client and each of their identity documents.
2. Sign the client and verifier declarations directly on your device.
3. Complete the VOI to receive a code to access a secure VOI report.

IDfy awards

IDfy won Australian Business Awards for New Product and Mobile Innovation in 2016. These awards recognise the transformative nature of IDfy and InfoTrack's commitment to developing forward-looking, innovative, and adaptable solutions to new challenges.




Download on the **App Store**

GET IT ON **Google Play**

“ IDfy has significantly improved and sped up the VOI process for us. IDfy is simple to use - anyone in the office can perform VOI. I would strongly recommend IDfy for any firms out there who are struggling to come to terms with the new VOI requirements or looking for an easy process to perform VOI checks. ”

- David Natoli, Solicitor at Natoli Howell



Gift of time promise

Save at least 6 minutes per client VOI

Features and benefits



Control

Gives you complete control of the VOI process - verify your client's identity from the comfort of your office.



iPhone, iPad and Android

Available through the App Store and Google Play Store.



Standardisation

Encourages a consistent, secured and streamlined Verification of Identity process.



Saving capabilities

Allows you to save incomplete identification data and finish orders at a later time once all identity documents have been received.



Secure

Creates a secure VOI process through encryption, password protection and remote storage of all data on secure cloud servers.



Storage

Securely stores your VOI information for nine years with reports valid for two years.

*Due to Android infrastructure, IDfy remote is only available for iOS.



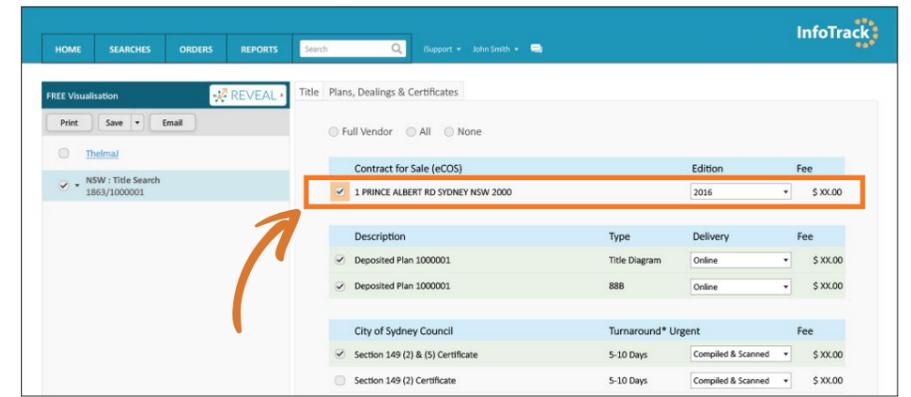
eCOS - electronic Contract for Sale

For lawyers and conveyancers in NSW, preparing a Contract for the Sale of Land can be one of the more time-consuming and tedious processes. It normally requires purchasing General Conditions pages from the Law Society, ordering searches and certificates from an information broker, preparing the Special Condition pages, and then manually piecing everything together in the correct order to compile the final Contract for scanning and sending. All of this activity adds up to continuous interruptions to workflow.

With eCOS and SignIT, we've created a one-stop-shop for all of your Contract for Sale needs. You can now compile, edit, sign and exchange a complete Contract for Sale electronically on our website from wherever you are.

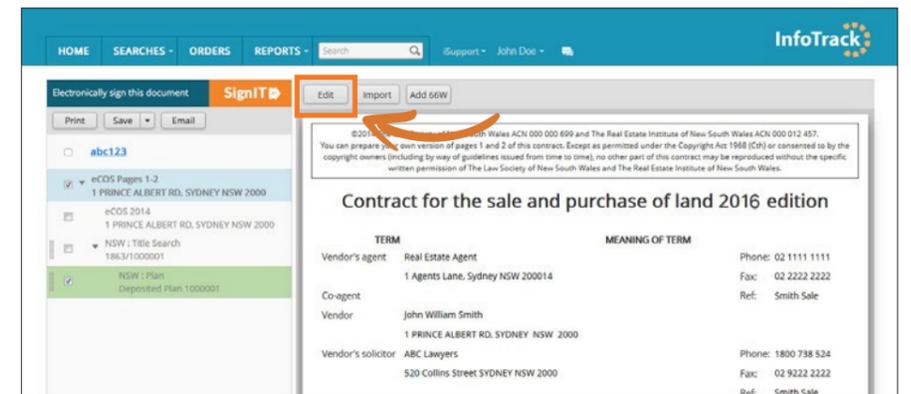
Step 1

Order your searches, certificates and eCOS on the InfoTrack website.



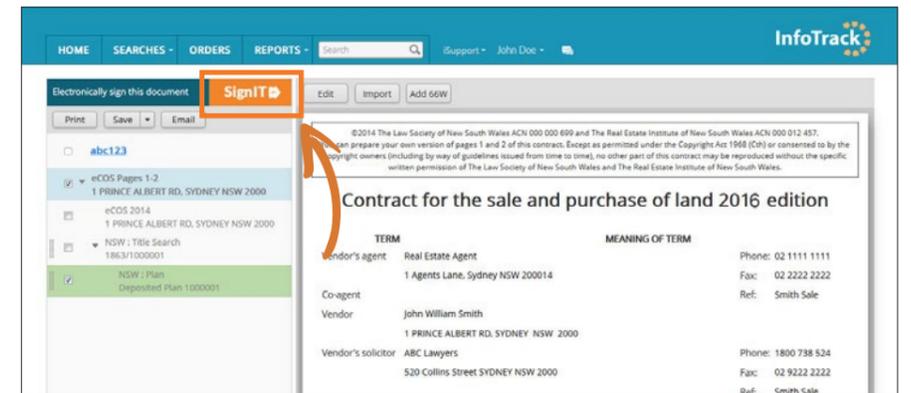
Step 2

Edit your electronic Contract for Sale



Step 3

Import additional supporting documents, then upload to SignIT.



Gift of time promise



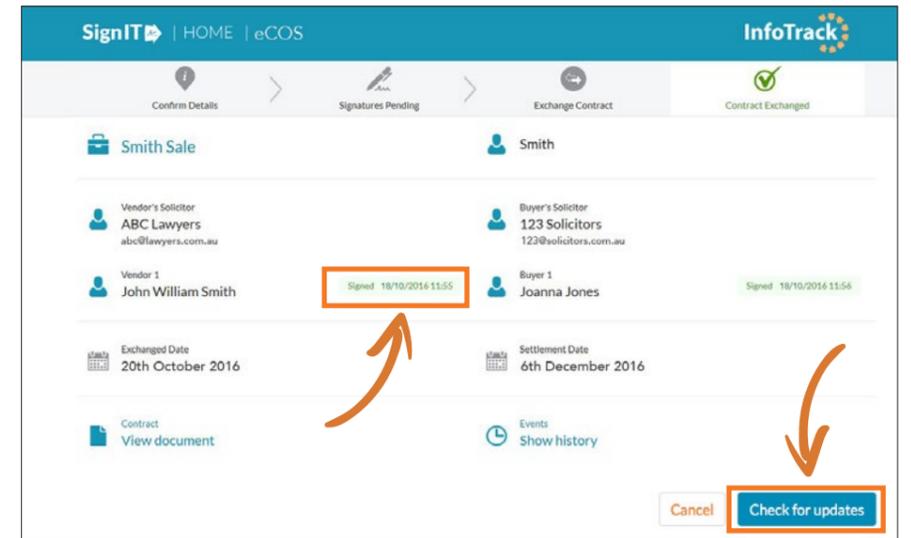
Save at least **12-18 minutes** per client



SignIT: eCOS

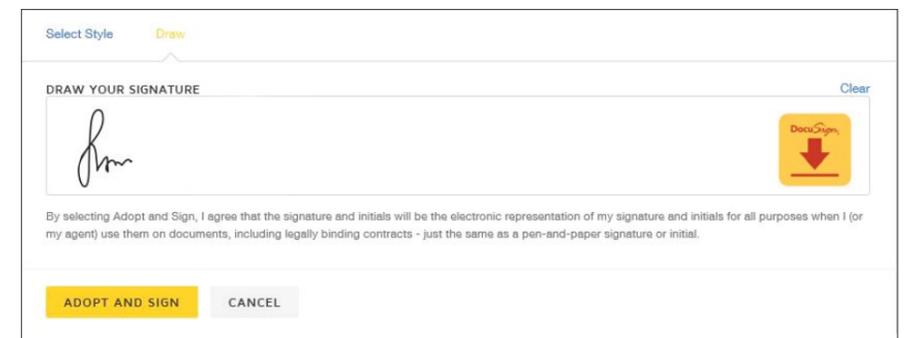
Step 1

Request and track signatures through the SignIT dashboard. Parties receive a link for signing via email, and don't need to be an InfoTrack client to sign.



Step 2

Each party reviews and signs the documents electronically with a stylus pen or adopts a standard computer-generated signature through:



Features and benefits



Single source

Order your eCOS, searches and certificates in just a few clicks and then electronically sign in our online platform.



Status update

View which parties have signed the Contract. You will automatically receive an electronic copy of the document once all parties have signed.



Editable

Easily edit the Contract for Sale, import additional documents and re-arrange the order of documents.



Secure

Fully secure signing process via DocuSign. Tracked by the latest technology with an audit trail report provided post transaction.



Time-saving

No need to manually print, collate and scan documents to compile the Contract.



Sign from anywhere

Clients can review and sign the Contract from any location at their convenience.

Gift of time promise



Save at least **12-18 minutes** per client

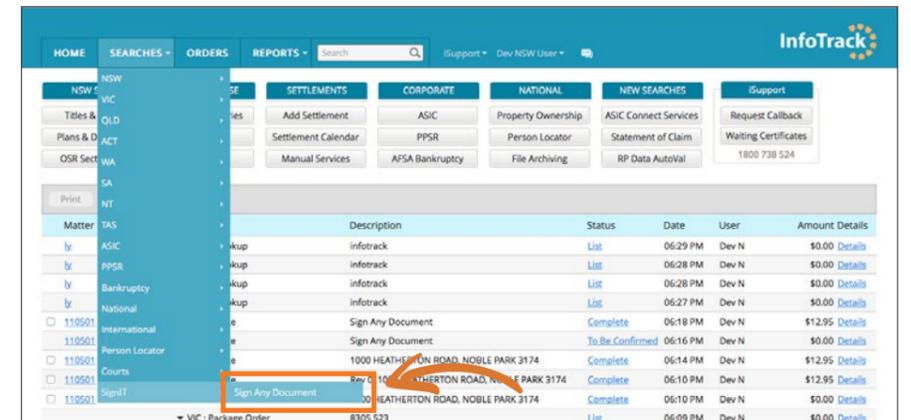


SignIT: other documents

SignIT provides you with the easiest and quickest way to execute documents by allowing you to electronically sign any document. Simply upload your document and send to the parties wherever they are. Avoid the inefficiency and delays involved with printing, scanning and posting documents once and for all.

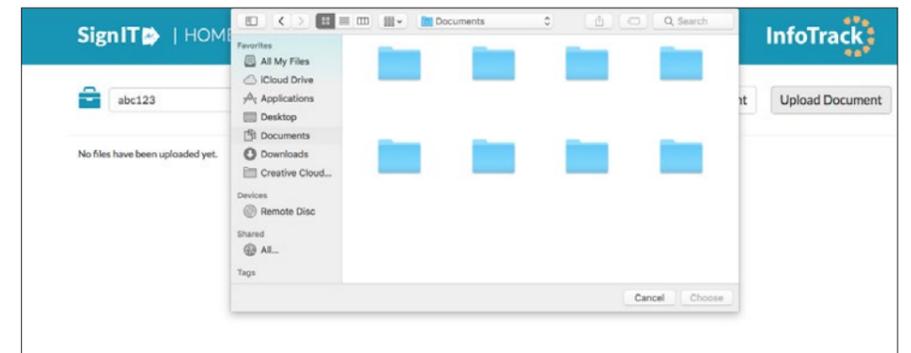
Step 1

Log into InfoTrack and select SignIT from the searches menu.



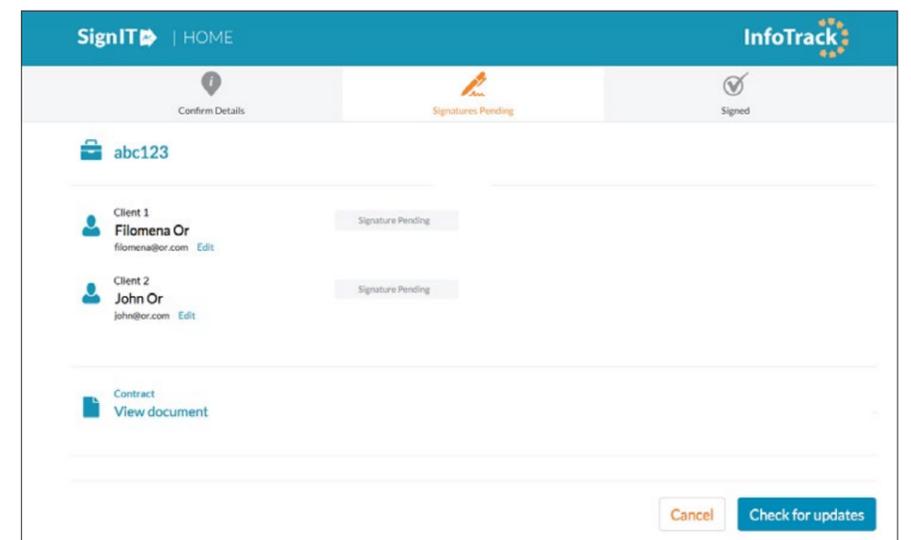
Step 2

Enter a matter reference and then upload the document you would like electronically signed.



Step 3

Enter the name and email for each of the signing parties and select 'Request Signatures'.



Step 4

Parties will receive an email with a link to sign the document. You will be notified once all parties have signed.

* It is up to you to do your due diligence to determine which documents can legally be signed electronically. The electronic Contract for Sale can legally be signed electronically.

“ Life prior to electronic signing was so much more time-consuming. Being able to electronically prepare and sign documents has truly streamlined the conveyancing process and had such a positive impact in so many ways. ”

- Kylie McArdle, Licensed Conveyancer, Ballarat Conveyancing



eSettlement with PEXA

Once exchange of Contracts is complete, you can create a PEXA workspace directly from the InfoTrack website. InfoTrack will map all of your matter information directly into the workspace so you don't have to waste time re-keying data.

Our integration with PEXA means you can avoid the hassle of printing, collating, scanning and posting documents. You no longer have to rely on couriers and settlement agents to get the job done and you'll save time, reduce errors, and have immediate reconciliation of funds.

InfoTrack's PEXA integration is the final piece of the eConveyancing puzzle allowing for a completely electronic and seamless process. From the moment a client walks in the door to the second the transaction is finished, every step can now be completed online.

Step 1

Create PEXA workspaces directly from InfoTrack with the click of a button.

Create PEXA Workspace

Matter: *

Title Reference1:

Title Reference2:

Jurisdiction: *

Representative Role: *

Financial settlement date: *

Check if other parties are registered with PEXA

Subscriber Name: Search Subscriber [Collapse](#) [Clear](#)

Step 2

Manage and launch your PEXA workspaces using InfoTrack's eSettlement dashboard.

Workspaces

Filter: Role: Order By:

Matter	Workspace id	Roles	Last Activity
00116-2016-RM-JJ	PEXA100022800	Proprietor on Title	2016-12-15T23:40:37.559Z
Status: In Preparation View More Details Launch PEXA Jurisdiction: NSW Parties: SIR James Harden Land Title Refs: 71103 Property Details: 145 TEST Street Melbourne NSW 1121			
00116-2016-RM-JJ	PEXA100022800	Proprietor on Title	2016-12-15T23:10:46.123Z
00116-2016-RM-JJ	PEXA100022800	Proprietor on Title	2016-12-15T05:00:09.001Z

Not registered with PEXA yet?

PEXA will help you register; you can start the process using any of the below methods. Make sure to select InfoTrack as your sponsor when you register to be able to create and manage your workspaces from within the matter.

[w onboarding.pexa.com.au/register](http://w.onboarding.pexa.com.au/register) [e support@pexa.com.au](mailto:support@pexa.com.au) [t 1300 084 515](tel:1300084515)

“ With PEXA, having everything in the one spot saves so much time for everyone. The biggest advantage for the vendor is being able to spend the money the same day as the sale, it's just that instant. ”
- Claire Martin, Head of Property, Kreisson



True PEXA integration

The market has been asking for true PEXA integration for some time – integration that allows for a seamless flow of information to PEXA to avoid re-keying data and to streamline the electronic settlement process. This is now a reality with InfoTrack’s PEXA integration which maps all of your matter information into the PEXA workspace with the click of a button – no need to manually upload csv files.

Our PEXA integration allows for truly end-to-end eConveyancing all under one roof with greater efficiency, transparency, connectivity, collaboration and service. The integrated workflow pre-populates data, eliminates manual processes, reduces errors, and allows for immediate reconciliation of funds. Using PEXA through InfoTrack, you only have to enter your PEXA password on your first login and all disbursements come under one bill.

Benefits of eSettlement



On-time settlement



Seamless integration



Greater certainty



Attend settlement wherever you are



Clear settlement funds faster



No more bank cheques

Benefits of true PEXA integration



Efficient



Reduced errors



Pre-populated data



No .csv files required



Seamless workflow



Single bill

ASIC Search

ASIC Extract

InfoTrack's ASIC Extract provides you with 3 x the value of a normal ASIC Extract. When you order an ASIC Extract from us, you also receive a CreditorWatch Credit Report and REVEAL workspace at no extra cost. This provides you with a more detailed picture of the company you're searching and allows for a greater level of due diligence since you can easily see the credit position of the company and the relationships between related people, companies and assets.

The CreditorWatch Credit Report contains unique data from CreditorWatch's 25,000 customers that allows you to assess the credit worthiness of any business in Australia. The CreditorWatch Credit Report provides a snapshot of a company's credit history and details risk data associated with a company.

Features and benefits



CreditorWatch report

CreditorWatch credit report included with your ASIC extract, for all legal and conveyancing firms.



REVEAL

Complimentary access to the REVEAL workspace, to visualise your search results.



Combined report

Ability to order a PPSR Search and ASIC Company Search at the same time, returned with a combined summary report.



Bulk searching

Bulk ASIC Search ability as well as copy and paste option of up to 100 companies at one time.



Email results

Auto email results options grouped into one email.



Export to Excel

Ability to export your search results to Excel.

ASIC and PPSR combined report

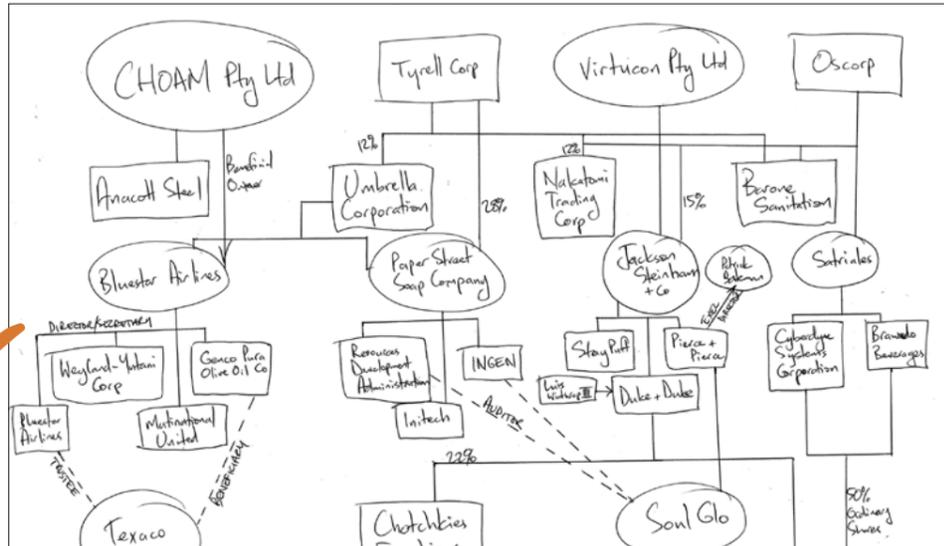
When you order an InfoTrack ASIC Extract you have the option of including a PPSR Search which will return your ASIC and PPSR results along with a summary report. The ASIC & PPSR Combined Report uses smart technology to analyse your data, identify areas of potential risk and highlight where more research may be needed. It also includes a free REVEAL workspace which aggregates your search results into one simple visualisation, instantly showing relationships between people, companies and assets.



“ There’s no doubt about it REVEAL has changed the way we interpret our searches. It removes intensive labour and time and gives us options. Analysing huge amounts of data used to be complex and time-consuming, but now with REVEAL it’s so easy with just a click of a button. ”

- Mary Digiglio, Managing Partner, Swaab Attorneys

Do your company search results look like this?



or this?



REVEAL data visualisation

REVEAL is an interactive workspace that simplifies your search results at the click of a button. REVEAL aggregates search results from multiple sources into one simple visualisation, instantly showing relationships between people, companies and assets. It allows you to easily delve into complex layers of ASIC, PPSR and AFSA search data, saving you hours of time and ensuring you don't miss out on critical information.

- Commercial Lawyer**
Provide quicker due diligence checks on acquisitions with the ability to easily perform follow on searches. Quickly and easily understand relationships between assets, people and companies.
- Accountant/Insolvency Specialist**
Significantly reduce time spent on interpreting corporate searches with accurate aggregated data and mitigate risk by minimising your chances of missing critical information.
- Banker**
Clearly visualise your borrowers' company and shareholder structures and easily export complex lending matters to excel for analysis.

Features and benefits

- Time-saving**
Analyse complex company structures and relationships faster through a single-page visual.
- Reduced errors**
Automatic data population reduces human error and business risk.
- Client engagement**
Present results to clients in an easy to understand format.
- Sharing**
Share a read-only version of the workspaces via email, while maintaining the ability to edit or cancel at any time.
- Timeline**
Easily see any changes to corporate structures from the establishment of the company through to its current form.
- Maps**
Use MAPS for REVEAL to visualise address information using Google Maps, including identifying clusters of addresses.
- Shareholder percentage**
View shareholders of a company and the percentages they hold in relation to each class of shares.
- Filtering**
Filter results by Company, Persons, Addresses, Documents or Relationships.
- Customised layout**
Customise the workspace manually, or by using one of the four layouts provided.

Gift of time promise



Save up to 2-3 hours per matter

Integration

Information, including matter reference, is automatically pre-populated into relevant search fields.

02

01

Searches are ordered directly from the matter.

Integration is simple & free of charge.

Completed search results are returned directly back to the relevant matter and stored into your document management system.

03

04

Cost recoveries are automatically captured and passed to your practice management system in real-time.

The power of integration

InfoTrack invented the integrated searching market 16 years ago. Integration as a word is often used loosely. The real meaning of integration is “the bringing together of separate elements to create a whole unit”. In InfoTrack language this means: we seamlessly and securely integrate into third-party systems, practice management systems, document management solutions and accounting software.

Who we integrate with:



We are working on the rest!

At InfoTrack we refer to our integration in 2 ways:

• Vertical integration

Vertical integration allows data to flow back and forth between your practice management system and our online search platform ensuring data is consistent and instantly accessible across all of your platforms.

• Horizontal integration

Horizontal integration links your online searching through InfoTrack, creating a seamless workflow by connecting one search to the next and providing you with critical information in a few clicks.

*While InfoTrack does not have any formal partnership in place with LexisNexis or Open Practice, the InfoTrack system may be used in conjunction with Lexis Affinity and Open Practice without breaching the end user agreement. InfoTrack remains committed to ensuring that the InfoTrack System works and will continue to work smoothly with both systems.



Over 10,000 of our users are logging their HelpDesk calls online through iSupport, our next generation HelpDesk.

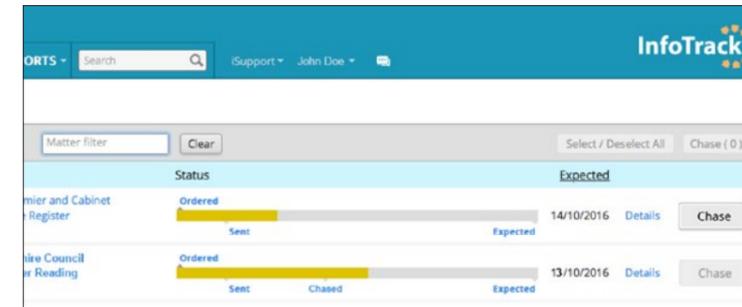


iSupport HelpDesk

Nobody supports you better.

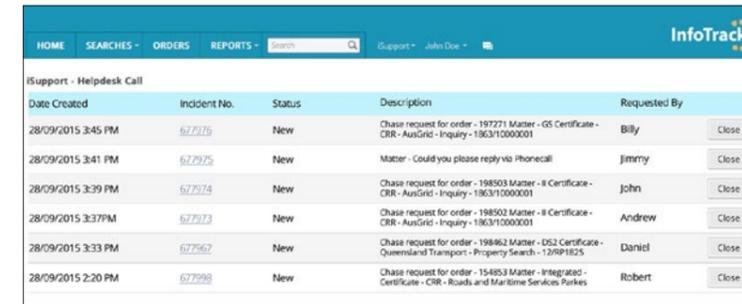
InfoTrack's next generation HelpDesk provides the control and transparency you need. With iSupport, you can access the support you need from us online in just a few seconds with minimal interruption to your workflow. iSupport puts you in the driving seat by giving you more control over your matters including the ability to:

- chase certificate orders with the click of a button.
- view notifications and add comments to your HelpDesk calls.
- request a callback at a time that is convenient to you.



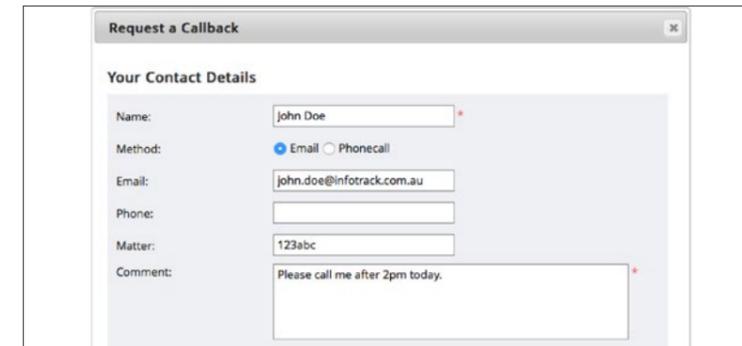
Waiting Certificates

Never wait for a progress update on your certificates again – no more phone tag or endless email chains. You can get the updates you need without picking up the phone and interrupting your workflow. Our online chasing option lets you receive real-time updates on the progress of your orders with the ability to chase them with a click of a button. Get the information you need without delay.



Notifications

You no longer have to wait for updates on your HelpDesk calls, with iSupport any updates on your call will be entered as they happen so you can easily view their progress online. With the ability to comment on your call or close it yourself, you're in the driver's seat.



Request a Callback

Getting the support you need is easier than ever – you don't even have to pick up the phone. Simply request a Callback Request from our staff in 2 clicks online and we will get back to you within 15 minutes or at any requested time by email or phone – your preference.

“ It only took me a minute to ask the question (via iSupport), I received confirmation that my question had been received, then the result came through shortly afterwards - I didn't have to leave the matter I was working in to make a phone call, or explain what I wanted over & over till I got the right person to help me. ”

- Jill Mooney, Tranter Lawyers



w www.infotrack.com.au/isupport
e helpdesk@infotrack.com.au
p 1800 738 524

The top priority for most law firms in 2016 is increasing efficiency.

Manual and inefficient processes are the key challenges for 40% of firms.

- July 2016 ALPMA/InfoTrack Survey

Download the full report at www.infotrack.com.au/alpma



Get in touch

Find out how we can literally give you the gift of time.

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