



# PowerConvey

## Business Application Template



Conveyancing cases of various natures assigned by clients such as financial institutions, and credit and leasing companies can be managed efficiently with a good workflow management system.

**PowerConvey** is the ideal and practical solution to organise your workflow. **PowerConvey** is a ready-made Business Application Template from **WORKFLOW GBS** for tracking, managing and monitoring high volumes of conveyancing cases. It assists legal firms in providing better services to their clients by providing up-to-date status reports instantaneously.

Specially designed for management of conveyancing cases, **PowerConvey** delivers the following benefits:

- Easy maintenance of every conveyancing case via online; in an orderly, accurate and consistent manner

- The mail-merge on document template and document management functions reduce the heavy volume, repetitive typing and administrative details, thus improves productivity
- Up-to-date conveyancing files are available at the touch of a keystroke, thereby allowing for timely follow-up actions
- Instantly available progress reports enables detailed analysis and prompt decisions to be made
- Connections to clients enable fast retrieval of error-free new conveyancing cases. Thus, better services is offered to clients by providing speedy and up-to-date status on all active conveyancing cases
- The system can be used to train new staff and improve distribution of the workload and subsequent monitoring lead to better staff performance and efficiency



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# Salient Features & Benefits

No.	Function	Description
A.	<b>Host Integration</b>	<ul style="list-style-type: none"><li>• supports most industry-standard data sources, including: text files, Excel files, SQL sources and XML files.</li><li>• Auto data download and upload via scheduler or base on workflow processes</li></ul>
B.	<b>Workflow Management</b>	Create custom workflow with triggers based on processing events. Easily modify workflow rules to keep pace with future changes
C.	<b>Case management</b>	Act as an electronic case folder to keep track of latest status in terms of case category, case status, person in-charge, case information, business partners assigned, documents, email and images
D.	<b>Case Distribution &amp; Assignment</b>	Auto distributes and assigns cases to relevant users or business partner base on predefine case distribution formula
E.	<b>Document/Image management</b>	Using electronic case folder to store and catalogue case documents
F.	<b>Alerts, Notifications &amp; Outstanding Tasks (Alarm Clock)</b>	Set custom alerts, notifications and outstanding tasks to automatically notify users & business partners of critical processing events
G.	<b>Management Information/Business Intelligent tool</b>	<ul style="list-style-type: none"><li>• Business partner performance report by specific tasks</li><li>• Billing (Transaction and Aging report)</li><li>• Commentary report – To show processing activities transpired since day one</li><li>• Case status report</li><li>• Status aging report by specific stages/tasks</li></ul>
H.	<b>Billing</b>	Keeping track of bills submitted by associated Business Partners per case basis. Option of calculating fees base on predefines formula can be included
I.	<b>Email/Fax/SMS</b>	Allows standard email/SMS templates to be created and linked to workflow processes to enable speedy sending of email/SMS all within one system and in the form defined
J.	<b>Security</b>	<ul style="list-style-type: none"><li>• Define security profiles for different categories of users</li><li>• Flexible combination of access rights to add, edits, delete or view</li><li>• Audit Trail</li></ul>

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