



## Digital enhancements to help you achieve faster matter completion and greater security, while meeting client expectations

Our latest release delivers e-signatures and smooth integration with Cloud Forms along with enhanced single sign-on, data imports and inclusivity options

### Electronic signatures

Our new integration with market-leader, DocuSign, offers your clients the freedom to sign any document, from any location, on any device. With 200 million+ users across the globe, they provide comprehensive e-signature functionality that legal firms can easily use and trust.

Firms can incorporate this functionality into their existing template library. Fields are available for both signature and date, and multiple signature fields can be added. Relevant matter contacts, who have been approved to sign matters online, are instantly available for selection.

Client signatures can be provided sequentially or all at the same time, giving you full control over when recipients receive, and sign, documents. Automated reminders can be set to save the time that would be spent chasing signatures. Expiry dates can also be set to manage and control access to documents.

Recipients simply receive the signature request via an email with a clear link to click to access the document and add their signature. Subsequent signatories can see those who have signed before them. Once the document is signed and completed, notification is received within ALB and a PDF copy of the signed document is automatically added to the matter history to provide a final document version.

#### Key benefits:

- > Delivers the dynamic power of Cloud technology
- > Replaces time consuming manual tasks
- > Eliminates costs associated with purchasing paper, printers, consumables or postage
- > Speeds delivery of signed documents, removing barriers and allowing faster matter completion
- > Documents are securely sent from within ALB, utilising ALB contact data, ensuring the correct parties receive the documents
- > Clients can sign and return documents easily, at a time that is convenient for them

### Cloud Forms integration

The integration of ALB and with the full digital efficiency of Cloud Forms offers the opportunity to significantly enhance the functionality of your desktop forms software.

Firms currently using Laserform benefit from a simple interface where users can access their recently viewed forms, search the wider library and access their custom mapped items. When opening a form they will directly access the new Cloud Form feature, without the loss of any mapped data.

When the form is saved in a standard way, a line in the ALB matter history is saved as a URL, linking to the form in its Cloud location. Re-opening the form returns users automatically to Cloud Forms. Required client information is automatically prepopulated with data that flows directly from ALB.

This integration offers a significant improvement in the management and sharing of forms, saving time and effort for every completed document. It also acts as a client collaboration platform that allows easy sharing with clients to enable faster form filling and accelerated matter completion.

#### Key benefits:

- > Delivers the dynamic power of Cloud technology
- > Form updates take place automatically, with no disruption to users
- > Continually expanding form library, automated versioning
- > Existing Laserform/ALB mappings remain in place, so no additional development work required
- > On-going access available for pre-existing forms
- > Convenient client collaboration for forms sharing and completion

You can find out more about Cloud Forms >> [here](#)

### Product >

ALB Practice and Case Management Software

### Release Version >

3.4

### Date >

September 2021

# ALB 3.4

## Single sign-on

ALB 3.4 will now act as a gatekeeper for all user firms who hold active user profiles and their passwords. This function will accommodate various levels of structure, from a single user on a standalone pc, to hosted clients using the Cloud directory Azure.

This development delivers real value to firms by offering centralised security and control of ALB and the ability to easily add or remove user permissions instantly, across applications, whenever necessary. It also supports the future proofing of your firm as it offers the potential to reduce the number of sign-ins required for other applications

By streamlining user access to multiple applications, your users will be able to access required systems quickly and more easily. They will also benefit from available self-service tools, including a forgotten password link.

## Key benefits:

- > Digitising processes: Embrace Cloud solutions
- > Improved security
- > Centralised control
- > Enhanced authentication process and user experience

## Faster management of data imports

The latest version of ALB also introduces two new functions that allow large amounts of data to be entered into ALB quickly.

- **Bulk matter processing**

This is an ideal solution for firms who want to quickly open new matters for existing, established clients. It's especially beneficial for firms who manage quantities of high volume, low value cases such as conveyancing.

Users can import the details of the matter via CSV. As information is often provided by another party, details of the case are listed so any required amendments can be made.

All completed items are simply selected for matter creation, and then instantly added to the relevant client record.

- **Account posting**

Scottish firms will benefit from the ability to enable bulk posting of interest payments against deposit accounts. The CSV information, provided by the bank, can be easily imported, and actioned for posting.

New postings are available by viewing the Deposit Account Tab. This saves cashiers significant time and effort in dealing with postings that have smaller transactional values.

## Enhanced database flexibility

- **Inclusivity**

To help firms who wish to become more inclusive, new data fields have been included in ALB 3.4.

A field for gender is now available, in addition to title and sex. Firms who want even greater flexibility can assign a default sex to the multiple choice title field.

- **Scottish Law**

New fields have been added to an individual's contact record and the executory module in the Scottish Probate Agenda.

Confirmed by the Scottish Law Society, changes to the executory module for private client matters include new fields for excepted or exempted estates and IHT400.

There is also an additional column within the assets table for stock price, to capture additional data around the actual estate and stock price.

For information on upgrading to ALB 3.4 please contact your Advanced Account Manager or speak to our support team

## More information

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