Web Forms

Easy web-form data captured into your PCMS.

Client data capture made easy.
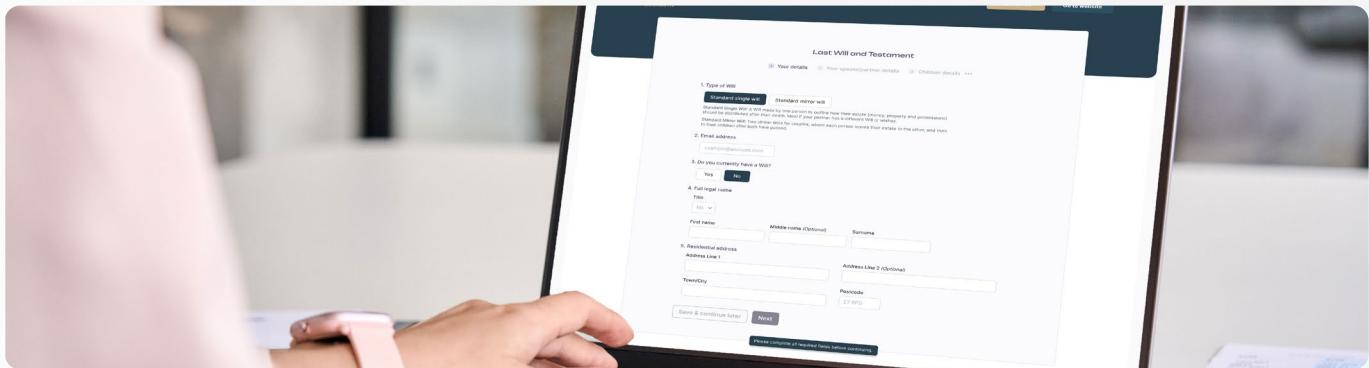
Instead of relying on paper forms, PDFs, and scattered email exchanges, firms can create tailored digital forms that guide clients through a smooth, intuitive onboarding experience. Forms are fully customisable to reflect firm-specific workflows, data requirements, and compliance obligations.

By digitising the entire intake process, firms reduce administrative burden, eliminate manual data entry, and accelerate case progression.

Submitted information flows directly into existing systems, giving teams immediate access to structured, reliable data.

Examples of Web Forms you can use

✓ **New Client Enquiry Form** – Initial contact details, matter type selection, and basic conflict checking.

✓ **Conveyancing Instruction Form** – Buyer/seller details, property information, mortgage status, and ID checks.

✓ **Remortgage Questionnaire** – Property details, lender information, title number, and existing mortgage particulars.

✓ **Will Planner / Estate Planning Form** – Personal details, executors, beneficiaries, and asset overview.

✓ **Lasting Power of Attorney (LPA) Instruction Form** – Donor details, attorney choices, preferences, and instructions.

✓ **Family Law Initial Assessment Form** – Divorce, separation, finances, or child arrangement information.

✓ **Employment Law Enquiry Form** – Claim details, employer information, employment dates, and key documentation.

✓ **Personal Injury Intake Form** – Accident details, injuries sustained, medical treatment, and evidence upload.

✓ **Commercial Client Onboarding Form** – Company details, directors, AML information, and matter requirements.

✓ **Litigation Case Intake Form** – Dispute details, parties involved, timelines, and supporting documentation.

✓ **Probate Information Form** – Estate details, death certificate information, assets, liabilities, and executors.

✓ **Immigration Client Assessment Form** – Visa type, personal history, eligibility checks, and document uploads.

✓ **Crime & Defence Client Intake Form** – Incident details, representation requirements, and legal aid eligibility.

Collect Data Digitally

Capture client information quickly and effortlessly through intuitive, user-friendly webforms. Clients can complete forms at their convenience, and your team receives structured, accurate data without the delays or inconsistencies that come with paper, PDFs, or email exchanges.
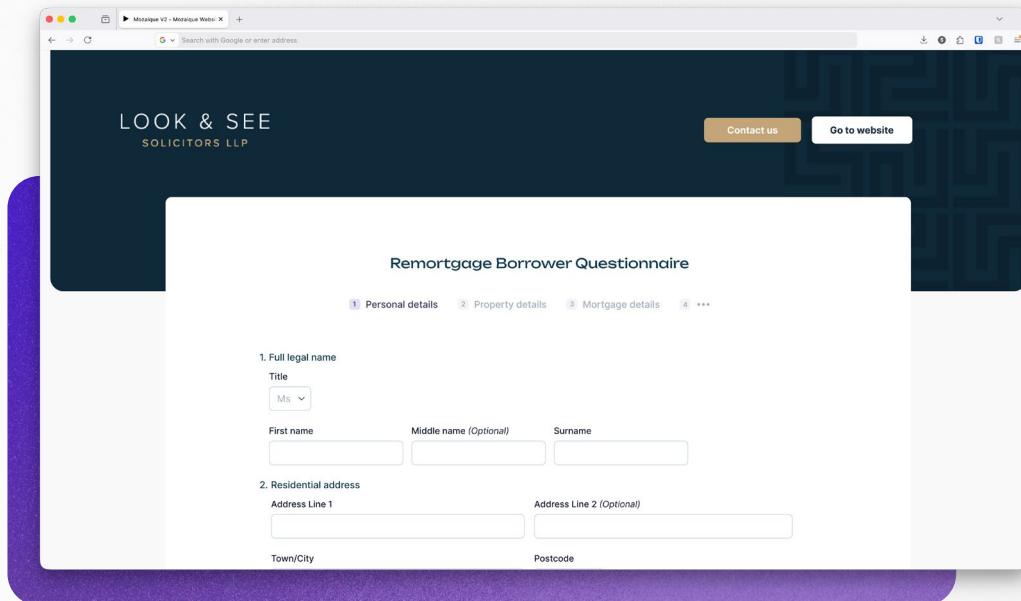
Fully Branded Web Forms

Create digital forms that reflect your firm's identity with custom branding, colours, and messaging. Every interaction feels professional and on-brand, reinforcing trust and delivering a cohesive client experience from start to finish.
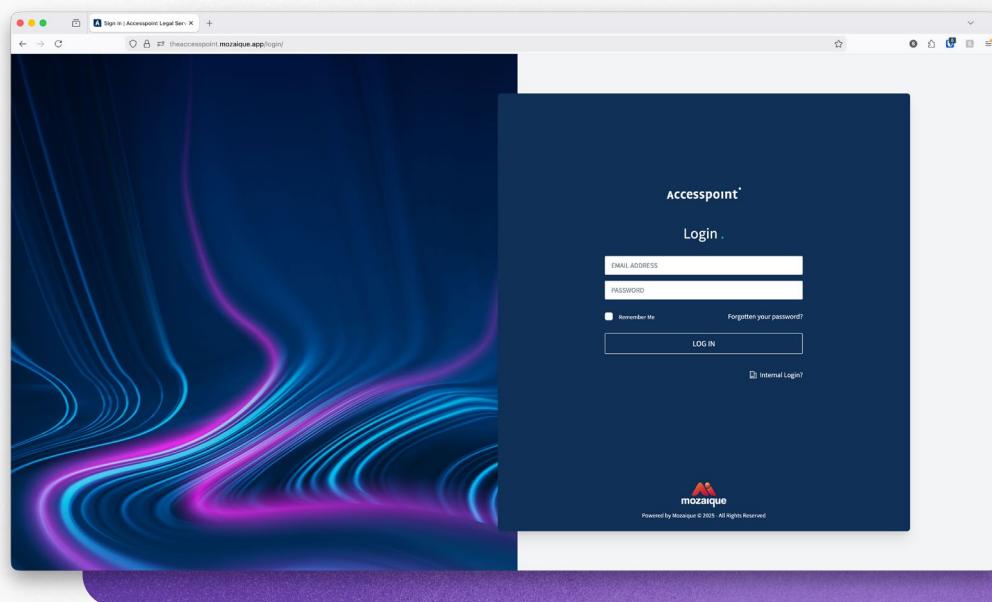
Website Enquiry Form

Convert your existing "Contact Us" form into a smarter, more powerful enquiry tool. Our technology enhances your standard website form with intelligent data capture, ensuring every enquiry is structured, complete, and instantly usable. Instead of receiving unformatted messages, your firm gets clear, organised information routed to the right team or department, helping you respond faster, prioritise effectively, and deliver a better first impression to every potential client.
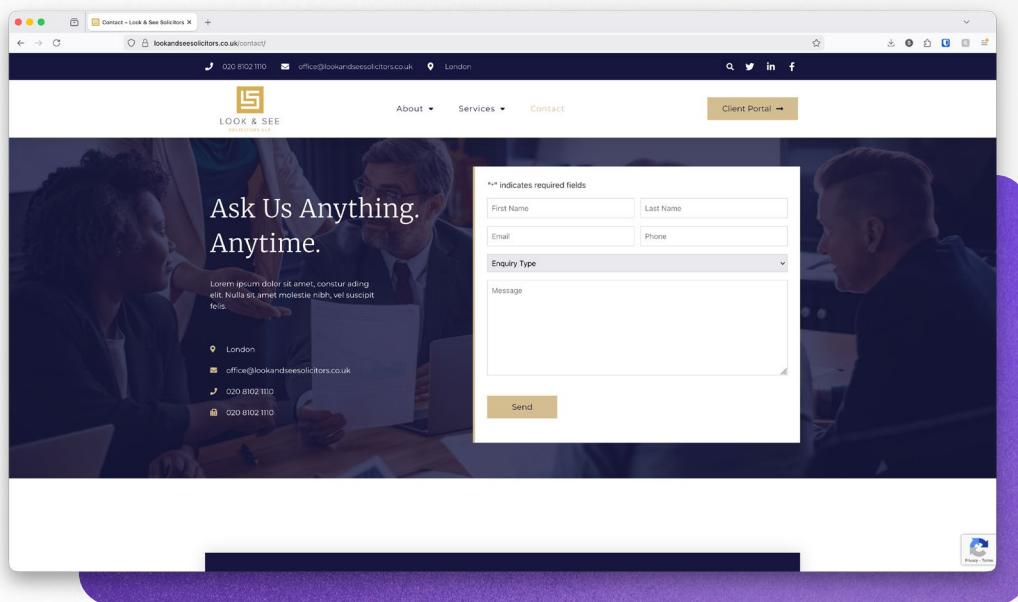
Department Specific Web Forms

Build tailored webforms for each practice area or department, ensuring you collect the exact information needed for different matter types. This keeps workflows efficient, reduces follow-up queries, and improves data accuracy across the firm.
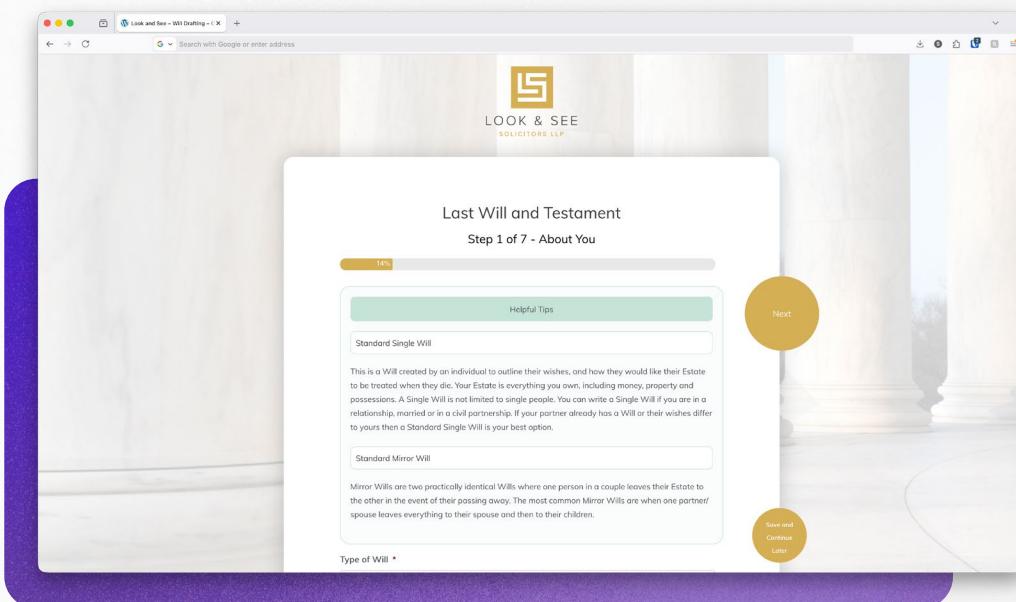
Secure Data Storage

Protect sensitive client information with secure, encrypted data capture and storage. Our platform ensures compliance with industry regulations and best practices, giving both your firm and your clients complete peace of mind.

PCMS/CRM Integration (optional)

Automatically sync captured data into your existing PCMS, CRM or other systems, removing the need for manual entry. We provide bespoke Webhook functionality so that information flows instantly into the right place, streamlining your processes and accelerating case progression.

Your Data
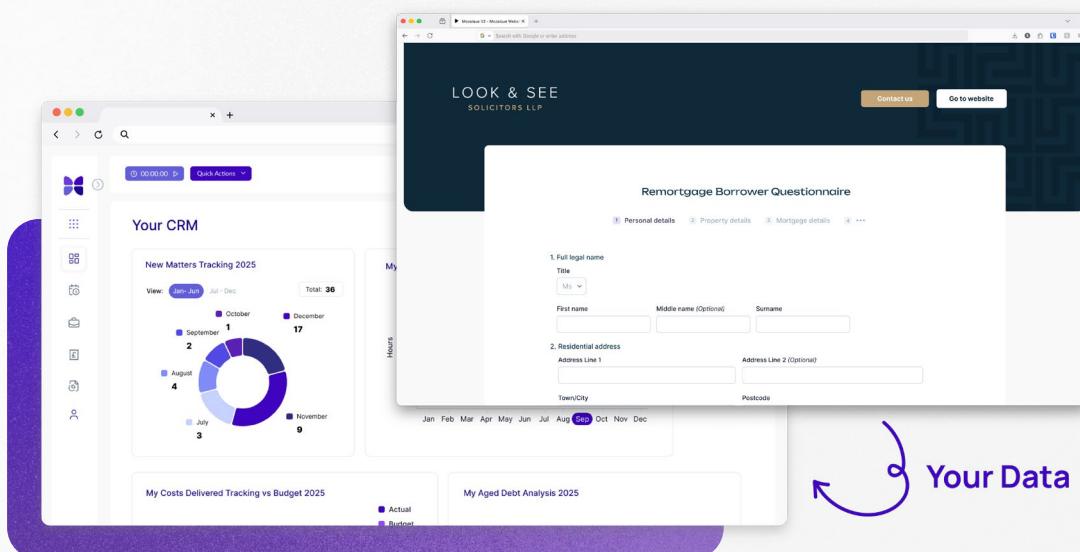
Conditional Logic

Build intelligent forms that adapt to each client's responses. Show or hide questions dynamically to keep forms concise, relevant, and easier for clients to complete.

Validation & Error Checking

Ensure data accuracy with built-in validation rules that prevent incomplete or incorrect submissions, reducing the need for follow-up clarification.

Automated Notifications

Receive instant alerts when a client submits a form, and trigger automated follow-up emails or tasks to ensure nothing slips through the cracks.

Multistep Form Layouts

Break complex forms into clear, manageable steps. This improves user experience and helps clients progress confidently through longer questionnaires.

Progress Saving

Allow clients to save their progress and return later, reducing abandonment and supporting more thoughtful, complete submissions.

Analytics & Tracking

Monitor form performance with insights into completion rates and submission trends, helping you refine and optimise your onboarding process.

Mobile-Optimised Forms

Deliver a seamless experience on any device. Forms automatically adjust to mobile, tablet, and desktop screens, ensuring accessibility and ease of use.

Guided Experience

Provide clients with clear instructions, tooltips, and guidance throughout the form, helping them understand exactly what information is needed and reducing the likelihood of errors or delays.

Website Integration

The webforms are hosted alongside your website for a smooth, uninterrupted journey. Clients can complete onboarding tasks reducing friction and improving engagement.