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Service Definition

OneAdvanced Legal

OneAdvanced Limited

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1. Overview

Established and built in the UK by OneAdvanced, OneAdvanced Legal exists to help UK and Irish law firms supercharge productivity and performance with a cost-efficient Cloud-native platform.

One single platform to power your law firm and built as a modern solution for legal professionals, OneAdvanced Legal isn't just integrated practice, case and accounts software, it's also a comprehensive and scalable platform that caters to your practice needs 24/7, from any location. This user friendly, easily accessible, and secure solution is complimented with continuous deployment, ensuring you're always working on the latest version of the software.

Financial control with comprehensive, integrated legal accounts

- ✓ Capable of meeting GDPR, HMRC, SRA, SAR, LAA, and Law Society regulations.
- ✓ A suite of reports provides the insight needed to monitor firm wide performance.
- ✓ Streamlined, compliant VAT returns using the Business Tax Portal.
- ✓ Fully integrated with case management, allowing smoother flow of financial information between departments.

Information management underpinned with data security

- ✓ All client, matter, contact information in a single database provides one true data source.
- ✓ Incorporated GDPR tools ensure users can manage data and documents compliantly.
- ✓ Documents stored centrally in the cloud, allow organised 24/7 access to all users.
- ✓ Full text search allows users to quickly locate documents.
- ✓ Simplified report queries surface results and insight that can be exported and shared.

Enhanced productivity building a high-performance culture

- ✓ Deep Microsoft integration offers a familiar, user-friendly experience.
- ✓ Persona created dashboards deliver real time information about each user's workload.
- ✓ Incorporated legal forms, with automated data pre-population.
- ✓ System-prompted time recording captures both billable and non-chargeable time.

- ✓ Automated templates ensure the correct document or form version is being used firmwide.

2. Software Modules

OneAdvanced Legal is available as a single SaaS solution, with a portfolio of solutions sold in three commercial subscription options.

Note these subscriptions are provided as a bundle on a per user per month basis.

Standard	Plus
✓ Practice and Case Management ✓ Legal Forms ✓ Business Tax Portal ✓ National Will Register ✓ Thirdfort *	✓ Practice and Case Management ✓ Legal Forms ✓ Business Tax Portal ✓ National Will Register ✓ Case Management Modules ✓ Agendas ✓ OneAdvanced AI ✓ Thirdfort *

* Should you wish to utilise the integration with Thirdfort, please liaise with your OneAdvanced sales representative

2.1. Functionality

Legal Forms

Legal Forms is a comprehensive form's library included in the OneAdvanced Legal. Using trusted functionality of our market leading Laserform and OyezForms desktop software combined with the Cloud technology, Legal Forms combines a submission platform for government agency

digital submission with forms in both .pdf and digital format. Cloud flexibility also enables secure, easy form sharing with both colleagues and clients, so matters can be completed more quickly. Our experienced editorial team make all required form revisions and upload them automatically to your library to ensure you are working from up-to-date templates.

The National Will Register

The UK's Will Registration and Search Service. With over 10 million will in the system, and growing. It exists to ensure that untraceable wills are a thing of the past and that no estate can be incorrectly distributed. The National Will Register, working with The Law Society, is widely used by the legal profession, Will writers, PI insurers, government agencies, genealogists, charities and the public. Out of every five Will Searches, one results in a will being located where the estate was presumed intestate, or a later will being discovered that supersedes the Will being used to distribute the estate. This integration will enable your firm to seamlessly register your clients' Wills with The National Will Register for no cost, or conduct a Will Search from within the platform for any instructed probate matters within the OneAdvanced Legal Module.

Business Tax Portal

With the Making Tax Digital (MTD) legislation now in place, we understand that many businesses will still be unsure on how to meet the HMRC regulation. At OneAdvanced, we have a deep understanding of the rules in place and we have worked alongside HMRC to produce a solution that will enable finance teams to comply with ease and minimal effort. Using Business Tax Portal, organisations can submit their VAT digitally and directly to HMRC with our secure and computable Application Programming Interface (API) link.

Thirdfort – Money Laundering Prevention

Thirdfort is a third party supplier that provides integration with OneAdvanced Legal to carry out online identity/money laundering checks. From basic information entered into OneAdvanced Legal, using Thirdfort this will interrogate the Thirdfort database over the internet and have returned from it information about the individual. This is to assist in identifying any possible issues around money laundering.

Please Note – A subscription must be taken out with Thirdfort directly.

Case Management Modules

OneAdvanced Legal (Plus subscription) comes with a suite of pre-defined case management modules, introducing process management which can be tailored to meet the needs of each firm. All modules are included as part of the Plus subscription, details of the work areas covered can be found below.

- Conveyancing
- Re-mortgage
- Family
- Personal Injury (including portal)
- Crime
- Civil Public funding
- Cash Collection (Credit Control)

OneAdvanced Legal – Agendas

OneAdvanced Legal (Plus subscription) comes with the ability for firms to create their own Agenda modules. Agendas are an introduction to process management, allowing firms to define a module, that prompts a user to follow tasks to complete an objective. The benefits of implementing Agendas includes risk management, improved efficiencies, promoting consistent firm processes.

OneAdvanced AI

OneAdvanced AI is included in OneAdvanced Legal's Plus subscription. It is cutting-edge technology integrated into OneAdvanced Legal, empowering law firms to harness the power of artificial intelligence in a safe and secure environment. OneAdvanced AI is a UK-hosted, private LLM, enabling firms to automate document generation, extract insights from large datasets, and streamline workflows. The benefits of leveraging OneAdvanced AI include enhanced productivity, improved accuracy, and data-driven decision making, ultimately driving business growth and competitiveness in the UK legal market.

2.2. Parameters

Licensed based on the number of named users.

2.3. Excluded / Out of Scope

Integrations – OneAdvanced Legal has a suite of APIs that enable integrations to OneAdvanced Legal within the firm's tech stack, depending on which applications need to flow in data for OneAdvanced to consume or send out data captured. Any requirements for integration of third-party solutions is discovered during Solution scoping to ensure clear agreement and management of these requirements.

Third party solutions – customers are responsible for procurement of their own third-party solutions, OneAdvanced does not procure these for customers

Fair usage policy – OneAdvanced reserves the right to manage excessive or unreasonable usage of the OneAdvanced Legal solution. In such cases, we may take measures including, but not limited to, throttling the service or implementing other reasonable mitigations. This may apply to automated or bulk processing that exceeds normal usage patterns, or any other activity that may be considered detrimental to the overall service. Customers are expected to use the OneAdvanced Legal solution in a responsible and reasonable manner, consistent with the intended purpose and functionality of the service.

3. Optional Modules

File Quality Review Agent and Matter Quality Agent

The File Quality Review and Matter Quality agents are advanced modules available within OneAdvanced Legal as a bundle. Designed to enhance law firms' quality management and compliance, these agents enable firms to proactively monitor and review the quality of their files and matters, identifying potential issues and areas for improvement. By leveraging these agents, firms can ensure adherence to internal processes and external regulatory requirements, ultimately reducing risk and improving overall quality standards.

4. Third Party Software

Applicable terms and conditions for Third-Party Products relating to a Software or Service are located: [here](#).

5. Pre-requisites

- Each user must have a suitable Microsoft 365 subscription, examples include: Business Standard, Business Premium, E3 or E5. This is not supplied by OneAdvanced and will be procured by you.
- Microsoft 365 Business Standard, Business Premium, E3 or E5 subscriptions include SharePoint and OneDrive. SharePoint includes 1TB of storage (firmwide). OneDrive includes 1TB of storage per user. If you require additional storage, this can be purchased at the rates in operation at Microsoft at the time of order.

- Internet connection with a min download speed of 10mbps.
- Internet browser, Microsoft Edge, Fire Fox, Chrome, Safari
- Recommended screen resolution 1366 x 768 other resolutions supported.
- 3rd party integrations require a direct agreement with the 3rd party.

6. Service Platform

Hosted solutions or software as a service solutions are provided in accordance with the [Service Platform Overview](#).

7. Security

Hosted solutions or software as a service solutions are provided in accordance with the relevant technical and organisational [Security Measures](#).

8. Support

Support services are provided in accordance with the relevant [Support Terms and Conditions](#) for the Customer Care Package as contracted.

We understand and recognise the mission critical nature our products play in your organisation. We are dedicated to transforming the service delivery experience you receive from us that prioritises your long-term success, at every stage of your journey with us.

8.1. Customer Care Packages

To support your growth, we've created three customer care packages, each designed to give you the right tools and services for where you are on your journey.

Offering	Essentials	Enhanced	Elite
Multi-channel Technical Support	Support Portal	+ Phone	+ Phone
Software Downloads, Updates, & Maintenance	✓	✓	✓
Case Management	✓	✓	✓

Offering	Essentials	Enhanced	Elite
Support Portal, Knowledge base & Community	✓	✓	✓
Escalation Management	✓	✓	✓
Severity Level 1 Target Response Time	2 hours ¹	1 hour	30 mins
Severity Level 2 Target Response Time	4 hours	4 hours	4 hours
Severity Level 3 Target Response Time	8.5 hours	8.5 hours	8.5 hours
Severity Level 4 Target Response Time	25.5 hours	25.5 hours	25.5 hours
24/7 Customer Service Centre Access	✓	✓	✓
Case Support	Digital Engagement	+ Support Agents	+ Priority Routing
Case Reporting	Self-Serve Dashboard	+ Twice Yearly Reports	+ Technical Success Manager
Service Centre Users	3	5	10
Service Desk Hours Mon-Fri excluding Bank hols ²	09:00 - 17:00	09:00 – 17:30	08:00 – 18:00
In Product Support Tools Where Applicable	✓	✓	✓

² for product specific variations, please refer to our [Customer Support Handbook](#), the times stated are subject to sector specific variations e.g., Healthcare

Offering	Essentials	Enhanced	Elite
FAQs	✓	✓	✓

9. Platform and Security

We power the world of work through our sector-focused software, bringing together mission critical **workflows** and a unified **user experience** that connect your organisation.

All underpinned by our **Delivery Platform** - offering scalability, security and connectedness by providing shared services such as cyber security, data analytics and AI innovation.

USER EXPERIENCE

A common user experience and persona-based analytics, reporting and dashboards means ease of adoption across your organisation.

WORKFLOW APPLICATIONS

Connected, sector specific, workflows mean you'll have a smarter data driven user experience with user specific tools.

DELIVERY PLATFORM

Secure and scalable services for real connectedness. Cloud services for cyber security, user governance, API and integration management, a data layer and ethical AI and Machine Learning.

PLATFORM TECHNOLOGY – SYSTEMIC DELIVERY

Our platform is built for scalability, security and connectedness: with key components designed to enrich our Sector Portfolios. The platform embeds critical components, such as identity & access management, a common user-experience and API management into our Sector Portfolios with a systemic “build once, deploy many times” methodology.



SECURITY

System security by design with strict policy enforcement through automation. Integrated & proactive threat monitoring and intelligence.



Fully encrypted end-to-end environment



Protect data at a **user, department or organisational level**



Customisable, including whether you want your chats remembered or not



Private Spaces enable you to share and collaborate around role, team or organisational data in a **private and secure environment**



Manage and control usage – seamless access across OneAdvanced Portfolios



Single sign on – providing security and convenience for the end user accessing all OneAdvanced solutions



OneAdvanced Platform controls usage

OneAdvanced meets the requirements for the following accreditations:

- **ISO 27001:** The international standard for information security.
- **Cyber essentials plus:** The highest level of certification offered under the Cyber Essentials scheme.

SAFE. TRUSTED. SECURE

Our platform drives scalability, security, and seamless connectivity, serving as the foundation for our software. It unifies workflows across your organisation, ensuring the tasks you need are completed efficiently. Now enhanced with next-generation AI capabilities, it enables independent, adaptive problem-solving to tackle challenges with precision.

INTRODUCING THE ONEADVANCED TRUST CENTRE



Trust Centre

At OneAdvanced we understand that trust isn't given; it's earned. That's why we're launching our Trust Centre, a centralised online resource designed to make it easier for businesses to partner with us confidently. We've built this platform with your needs in mind, ensuring transparency, reliability, and clarity in every aspect of what we do. UK businesses are grappling with significant data and AI challenges. With 71% of organisations reporting data breaches and 63% targeted by cyber-attacks, the demand

for stronger protection measures has never been more urgent. Furthermore, 60% of businesses now view AI as a high or critical risk, with data security standing as a key concern.

The Trust Centre is our solution to tackling these challenges head-on. Designed to provide a secure, transparent framework, it helps businesses effectively manage risks related to data and AI.

Our mission is clear: to Power Your World of Work. The Trust Centre marks a vital step forward in that journey - offering you fast, reliable access to the information you need to evaluate OneAdvanced with confidence.

WHY TRUST MATTERS MORE THAN EVER

Trust is a critical currency in today's fast-paced, digital-first business environment. From customers to partners, businesses expect their suppliers to demonstrate accountability and provide transparency on how they manage data, ensure compliance, and maintain robust security measures.

Achieving data protection and AI compliance can be a daunting task, requiring significant time, resources, and budget. In fact, nearly a quarter of UK businesses cite budget constraints as their biggest security hurdle. To address this challenge, we've made a substantial investment in cutting-edge tools, streamlined processes, and dedicated resources, so you can focus on what matters most – your business – without shouldering the burden of costly compliance alone.

With the launch of the OneAdvanced Trust Centre, we're delivering a comprehensive solution to address your questions, streamline information access, and ensure you stay informed with the latest updates.

A COMMITMENT TO EARNING YOUR TRUST EVERY DAY

At OneAdvanced we believe trust is not a one-time achievement but an ongoing responsibility. We'll be continuously updating the Trust Centre to include the latest certifications, evolving industry standards, and fresh resources, ensuring you're always equipped with the most relevant and accurate information.

Our goal is to empower your organisation to make informed decisions and innovate with confidence, knowing that OneAdvanced is a reliable partner committed to your success.

Please see OneAdvanced's [Trust Centre](#) for more details.

9.1. OneAdvanced AI



Introducing **OneAdvanced AI** - a private, secure AI service for role, organisation and sector specific work in UK organisations. OneAdvanced AI is designed to support customers who are looking to adopt AI but have privacy concerns and skill/knowledge limitations around AI.



UK hosted AI Service ensures that your data stays on UK soil, ensuring compliance with local regulations



Business-grade, **customisable, privacy controls** allow you to set permissions by user, function or organisational level



Secure AI for business. Built to give companies confidence in AI adoption without compromising security

Features include:

- UK-hosted, private, AI service
- Identity management controlled by the organisation
- Unified user experience (WCAG 2.2 AA compliant)
- Privacy controls set by user
- Secure personal environment for file upload and storage
- Reasoning AI to show logic process of conclusions, analysis and answers

We're redefining AI for business - **safely, securely**, and with real results.



Protect your data: Our UK-based hosting ensures that your data remains in the UK, under your control and in compliance with local regulations.



Work privately: Our private spaces allow you to upload files to a secure environment. Bringing the power of AI to your documents without compromising on security.



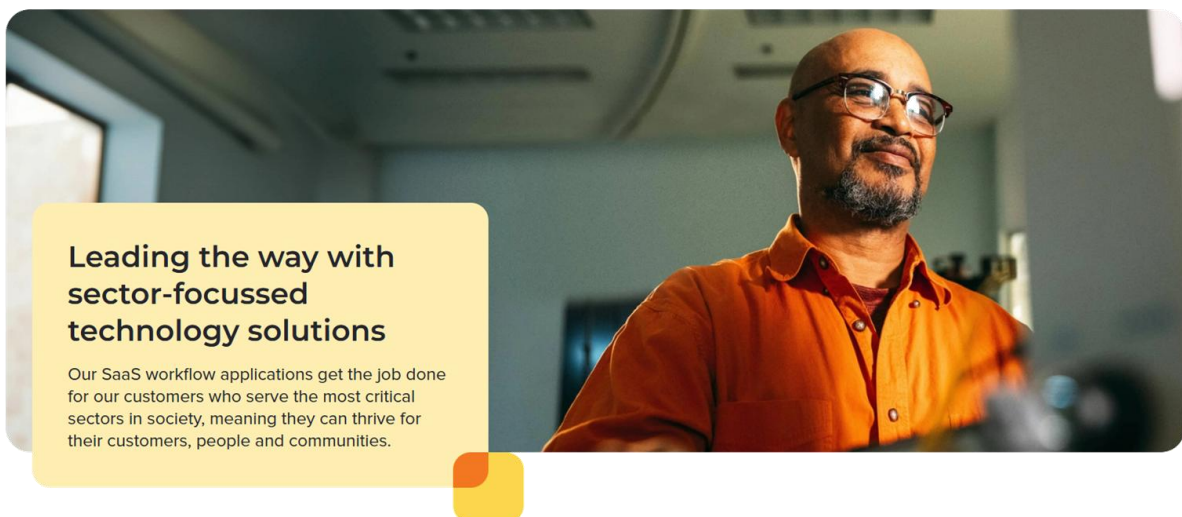
Enhance productivity: Our Retrieval-Augmented Generation technology combines data sources to enhance work, making it easier to complete tasks and achieve goals.

Explore how we uphold the principles of Responsible and Transparent AI [here](#).

10. Introducing OneAdvanced

OneAdvanced is the UK's third largest provider of business software and services with a £330m turnover, 10,000 customers and 1,800 employees. We provide enterprise and market-focused solutions that allow our customers to reimagine what is possible, innovate in their sectors and improve the lives of millions of people in the UK.

OneAdvanced solutions help to care for 65 million patients in the UK, send 10 million sports fans through the turnstiles, manage over £1 billion in charity donations, support 2.5 million students and get over 1.2 billion passengers to their destinations on time. By continually investing in our people, partnerships, and technologies, we provide right-first-time solutions that evolve with the changing needs of our customers and the markets they operate in.



We are more than just a software company. We **power the world of work** for our customers. Read more about us including information surrounding our culture and values [here](#).

ESG

Our Bettering Society ethos is at the heart of the way we do business. We are committed to leveraging our solutions to provide a brighter future for everyone, improving our societal impact and engagement. We achieve this across the four pillars of our ESG Strategy.

Our purpose is clear: to create a fairer, more inclusive society through the power of our people and our software by 2030. At the heart of this is our Bettering Society ethos - our guiding principle that shapes everything we do.

- **Better for the Planet** – by working with communities to reduce inequalities and empower more people to make climate-conscious choices.

- **Better for our People** – by breaking down barriers to career opportunities and creating pathways for meaningful, inclusive growth.
- **Better Technology** – by delivering solutions that drive positive outcomes for our customers, their people, and the wider communities they serve.
- **Better Business** – by upholding ethical, responsible, and compliant practices that reduce inequality and promote long-term trust.

Our ambition is to embed sustainability and integrity into every aspect of our business. We are investing in transformative technologies and strategic partnerships that accelerate our impact, while maintaining accountability through transparent reporting and meaningful stakeholder engagement.

Discover how OneAdvanced AI delivers trusted, UK-hosted AI solutions with a focus on sustainability, fairness, and accessibility through our [AI ESG Statement](#).

OneAdvanced has also made a commitment to transparency and accountability, publishing an annual Societal Report that outlines its progress towards its ESG goals. Please see [OneAdvanced 2024 Societal Report](#).

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A full list of its trading subsidiaries is available at www.oneadvanced.com/privacy-policy/

Powering the world of work

Our business software is the trusted choice for critical sectors, including healthcare, legal services, and education. We keep the world of work moving.

Speak to our expert consultants for personalised advice & recommendations, & get support on the products you are interested in.

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