

SELECTED BENEFITS

Type	Characteristic	Differentiating Feature	Flexibility To Address Changing Needs	Software Support	Ease of Use and Productivity Enhancement	Integration For "Best-of-Breed" Selection Flexibility	Technology Basis For Growth
Feature By Workflow Area	Centralized entity management system to easily add or modify unlimited address/phone records, track contact history, and define relationships	√	√		√		√
	Integrated marketing functions with time & billing and a gift-giving tracking modification that allows reporting to be handled in exactly the same way as it currently is conducted by your marketing personnel	√	√		√		
	Integration of Contact Management workflow with Microsoft Word and Outlook including ability to export folders to Outlook	√	√		√	√	
	Rules based file opening	√	√		√		√
	Cllient/Matter Set-up Templates	√			√		
	Time entry features that make extensive use of drop-down lists, short-hand abbreviation codes, spell checking both on-the-fly and for transactions that are grouped on a draft bill; search across all fee and cost narrative in register for specific text string; copy from-to feature for transactions	√			√		
	ProVantage Briefcase gives timekeepers on-the-go fee, cost, expense entry as well as extensive inquiry and productivity tools.	√	√		√		
	Automatic synchronization between offline entries and edits in Briefcase and central database upon reconnect	√			√		
	iFee Internet browser-based fee and cost entry	√			√		
	Auto-ditto features in WIP				√		
	Auto detect task-based matters for timekeepers upon entry	√			√		
	Timekeeper calendar summary of billable fees, nonbillable fees, firm time, and total. Double click a day with missing time to start a time entry. Toggle between calendar and weekly graphical views.	√			√		
	Personalized timekeeper productivity measures such as budget achievement, realization and utilization	√			√		

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Feature By Workflow Area	Powerful timekeeper inquiry of fees by matter, client, timekeeper, and accounting status for any date range	√			√		
	Client cost inquiry of costs by matter, client, entry id, and accounting status for any date range; cost inquiry into origin (AP vendor invoice or WIP) and real time payment status	√			√		
	Optional fee-entry rules to give the firm needed quality control of fees entered into the database	√	√				√
	Ability to run draft bills by flexible selection criteria including billing accounts, clients, and/or matters or relevant organizational dimensions such as office, department, section, practice group, timekeeper types, billing cycles, auto bill limits, etc.	√	√		√		
	Forms design built around Microsoft Office products such as Word and Excel so you can easily customize draft bills, bills, statements, checks, collection letters, balance sheets, cash flow statements, and profit/loss statements	√	√		√		√
	Flexibly create formats in a WYSIWYG environment	√	√				
	Unlimited formats available for each type of document		√		√		√
	Display “Fees” as “Costs” option on draft and bill formats	√			√		
	Ability to reprint any document type, even in a different format if desired		√		√		
	Flexible draft bill adjustments for single transactions or prorations by groups of transactions organized by timekeepers, locations, cash/noncash costs, tasks, fee codes, etc.	√	√		√		
	Ability to merge WIP transactions on existing draft bills, reject individual transactions, reject groups of transactions, reject all transactions back to WIP at original or adjusted value		√		√		
	Ability to transfer a transaction to a different draft bill or to another client/matter altogether without having to reject draft bill first	√			√		

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Feature By Workflow Area	Ability to split one or more transactions across multiple matters without having to reject draft bills first and reentering WIP	√			√		
	Ability to add transactions to a draft bill that have not been entered previously into WIP	√			√		
	Provide a complete audit trail of all changes to any fee or cost transaction (inquiry and report)	√	√		√		
	Complete billing and payment ledger online with summaries for bills, payments, credit memos, retainers, etc. as well as the capability to drill down into detail behind each of these ledger entries	√	√		√		
	Support for a wide variety of billing arrangements including group (multiple client & client level) billing, matter level billing, and split billing with date-effective individual splits for fees, costs, add-ons (latter req. Split Billing)		√		√		
	Rules-based value billing to support intellectual property billing arrangements and realization	√	√		√		√
	Support for e-billing standards such as LEDES, Tymatrix, LegalGard, etc. (Req. E-Billing)	√	√		√		
	Support for 4-level deep phase/task structures and budgets under any matter	√	√		√		
	Copy Matter Task Budgeting Set-up Templates				√		
	Ability to budget any project by any combination of date range, timekeeper, and task code and compare to actuals.	√			√		
	Ability to create a complete billing package during the printing process that is collated by the firm's relevant dimensions	√			√		
	Rules-based collection processing by user-defined collection groups with reporting capability defined by timekeeper types	√	√		√		
	Real-time inquiry for financial and billing performance data organized around clients and matters		√		√		
	Online inquiry for client ranking as well as reporting of same	√	√		√		
	Memorized transaction capability in GL and AP				√		
Mass budget creation in GL		√		√			

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Feature By Workflow Area	Pop up GL inquiry from any ProVantage workflow area so you can immediately gauge the impact of a fee transaction, bill, payment, AP invoice, etc. on the GL	√			√		
	Complete GL inquiry engine for locating transaction sets in GL by number, journals, source numbers such as invoice number, entry, creation, and posting dates, entry ID, reference line information, posting account or posting account ranges, dollar amount or dollar amount ranges, etc.	√			√		
	Automated interface between GL and all other subsystems (WIP, AR, AP, and Trust) through the use of rules that mirror the way you operate your business (cash, modified cash, modified accrual, or accrual)	√	√		√		
	Profitability reporting				√		
	Timekeeper Budgeting				√		
	Robust, flexible executive information decision support system with summary information and drill down through relevant organizational dimensions for critical success measures such as utilization, realization, and profitability (Requires Executive Portfolio)	√	√		√		
	Over 100 reports that come standard with ProVantage; each report offers selection and sorting criteria and can be stored for reuse and/or scheduled using relative date selection criteria	√	√		√		
	Use of industry-standard report writer to build ProVantage reports that provide the firm with the capability to create new reports and modify existing reports easily; built-in database aids for easily adding custom reports	√	√		√		
	Design & Technology	ProVantage software is a mature product built with best tools and rigorously tested for quality	√	√	√		
	Completely built on Windows platform						√
	32-bit thin client/server architecture	√					√

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	Single, integrated Microsoft SQLServer database supports all marketing, time & billing, accounting, and executive information functions	√	√				√
Design & Technology	Integrated application environment complete with, menu, toolbar, context panel, status bar, task palette, and active grid area to make it easy to understand where a user is in the software	√		√	√		√
	Internet-ready						√
	N-tier ready						√
	Security manager to manage & control access by groups with fine granularity down to single fields in many cases; unlimited number of firm-defined groups	√	√		√		
	Firm options that organize the software around the way that you do business rather than forcing you to work the way the software works	√	√		√		
	User-defined fields manager	√	√		√		
	Component based software model; development tools and components are packaged so the firm can extend the capabilities of ProVantage with its own resources if desired	√	√		√		√
	Intuitive interface allows you to know what to do when you find the information you want	√			√		
	Keyboard equivalents throughout the software for people who do heads down data entry				√		
	Wizards that walk end-users through the entire file opening process with time-saving set-up templates also available	√			√		√
	Streamlined work flow procedures throughout the software				√		
	Unique word search capability allows you to find information fast	√			√		√
	In-list editing	√			√		
	Date-effective records throughout the software for timekeeper assignments to clients and matters; client and matter assignments to offices, departments, sections, and practice groups; timekeeper credit allocations; fee, cost, and addon rates; split percentages for split billing; etc.	√	√		√		√

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Design & Technology	Variety of tools available to the firm that support your use of ProVantage including ability to create and modify payment application methods, manage fee and cost recovery batch processes automatically, modify fee, firm time, and cost entry screen to your specs, and to conveniently set up defaults for timekeepers to minimize key strokes	√	√		√		
Service	Context-sensitive help screens with ability to annotate and edit text	√	√	√	√		
	Finding information through Help quickly through topic locators and hyper-links to related subject areas			√	√		
	Release history changes are accessible online	√		√	√		
	A reverse chronological list of help screens accessed by each user is available online	√		√	√		
	Each firm has available administration tools for managing processes, clearing queues, etc. before making support phone calls	√		√	√		
	Unlimited phone support through 1-800 number			√			
	Enhancement releases included in maintenance fees	√	√	√			
	Responsive and problem-solving support team	√		√			
	No process to contend with when you are seeking resolution of a problem or have a support question	√		√	√		
	95+ percent success rate in resolving problems on the first call	√		√			
	Rapid escalation early on in problem resolution cycle	√		√			
	Internet accessibility for FAQs, knowledge base, downloads, etc.	√		√			
	Convert historical data from previous accounting system. Quality control throughout the conversion process	√		√			
	Experience in converting many DOS-based systems	√		√			
	Folding of customization requests into mainline product so the firm can leverage ideas from other members of the ProVantage installed base and vice versa	√		√			

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Personnel	ProVantage software is built by people with many years of experience in the legal vertical market	√		√			
	Low turnover of key personnel in support and R&D			√			
Best-of- Breed Integration Benefits	Obtain optimal functionality and configurability with TimeMatters for your firm rather than accepting lowest common denominator solutions with vanilla functionality in areas of docketing and case management		√			√	
	Map individual solutions to specific problem areas of the firm such as cost recovery, document management, fixed assets, etc.					√	
	Use SQL versions of practice management solutions to seamlessly sync data across applications	√			√	√	