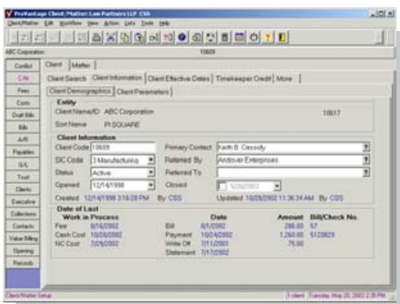
Solutions

Time & Billing

PROVANTAGE®
Financial Management • Business Intelligence

CLIENT/MATTER management

The ProVantage® Client/Matter Management subsystem saves time and helps avoid costly mistakes by using the power of the ProVantage Entity Management System (EMS) to centrally manage client information, avoid client/matter conflicts, and track all client matters.



Client Setup stores all relevant client information

The complexity of business and individual relationships can make it difficult to identify conflicts of interest. Yet those conflicts can have a chilling effect when they're discovered after a client has signed a contract with your firm. Having access to as much client information as possible is the key to avoiding these surprises as well as to providing the best client service and effectively growing your portfolio of clients.

To keep track of this information and put it to work to optimize your practice, ProVantage Software, Inc., a leading developer of integrated business solutions for financial and information management, has developed the ProVantage Client/Matter Management subsystem. Client/Matter Management integrates with the ProVantage Entity Management System (EMS) to enable professional service firms to steer clear of client conflicts and efficiently and easily manage in-depth information on new clients.

ProVantage Client/Matter Management enables your firm to:

- Save time and avoid mistakes by searching all existing clients, client relationships, related parties, and existing matters for potential conflicts of interest.
- Capture critical client information not found in traditional systems and use it to manage and analyze all aspects of your client relationships.
- Centrally maintain detailed fee and cost rates and contact information, saving time and eliminating duplication and inconsistencies.
- Establish unique billing options for each client or matter.
- Automatically adjust billing information by changing the effective date for changes of personnel associated with clients.
- Provide easy access to relevant information for any group of users specified by the administrator.

ProVantage Client/Matter Management helps you optimize your existing portfolio of clients and avoid conflicts of interest

ProVantage Client/Matter Management provides an unprecedented set of tools for analyzing all aspects of your portfolio of client/matters. Its powerful search, management, and analysis capabilities enable you to capture key client relationship information, quickly identify conflicts of interest, and provide better service to your existing clients. It also helps to ensure that client information is easily accessible across the firm.

Client/Matter Management consists of:

Conflict Management
Saves time and helps your firm avoid costly mistakes by identifying conflicts of interest prior to accepting new clients/matters.

Entity/Related Party Search
Searches all existing entities and related parties for potential conflicts of interest.

Related Party List/Details
Lists all related parties for a selected individual or company entity and enables users to drill down into the details of a selected related party.

Advanced Related Party Search
Identifies potential conflicts by searching for related parties using Boolean search algorithms.

Client/Matter Maintenance
Makes all key client information accessible across the organization to improve service, billing accuracy and save administrative time.

Client List/Search
Saves time, quickly locating clients by searching on a variety of client-related information.

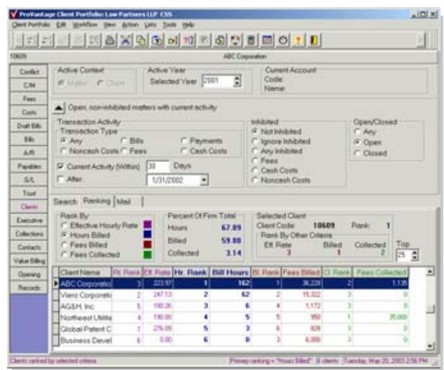
Client Information/Parameters
Improves client service and helps reduce billing errors by capturing critical client information—including referred by/to, rate structure, fee basis, and date opened/closed—and making it accessible across the firm.

Automatic Effective Date Updates
Tracks start and finish (effective) dates for up to five timekeepers and location assignments associated with specific clients or matters. Automatically adjusts reported information based on changes of personnel associated with clients.

Timekeeper Credit
Specifies the proportion of total client fees and costs to be credited for each timekeeper on a date effective basis. Accurately tracks attorney credits by client or matter, without having to adjust critical accounting information.

Matter List
Saves time by quickly locating and listing all matters related to selected clients.

Matter Information
Captures matter detail information including title, area of law, who it was referred by/to, date opened/closed, status, fee rates, and up to five user-defined fee/cost calculation rules. Helps to improve service by making critical matter information accessible across the firm.

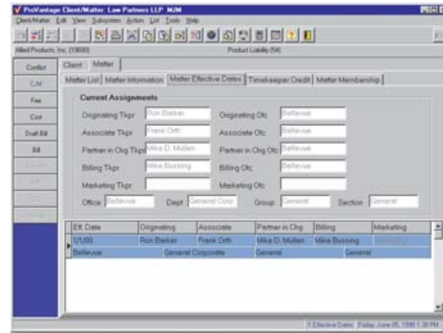


Optional Client Portfolio module enables users to view clients' rankings in terms of effective hourly rate, hours billed, fees billed and fees collected

Matter Membership
Helps to avoid billing errors and simplifies the billing process by linking all related matters to a selected account.

Account Maintenance
Simplifies the management of client accounts and related matters for single matter, multi-matter or split billing.

Account Search
Locates accounts by searching on any account-related information.



Matter Effective Date allows administrators to set up start and finish (effective) dates for up to five timekeepers and location assignments associated with specific client matters. It automatically adjusts reported information based on these changes of personnel.

Account Effective Dates
Helps avoid the time-consuming task of manually backing out transactions by maintaining effective dates that automatically update entries for matters and billing attorneys on selected accounts.

Account Matter Membership
Maintains the list of matters and their effective dates associated with selected accounts.

Client Portfolio™
A powerful graphical analysis tool that helps firms improve client service and maximize revenue by presenting up-to-date status information on all clients and client matters. Users can:

Analyze client/matter activity, realization, investment, aging and A/R history information.

Review investment, value of work, collections, and Work in Progress adjustments by client and client/matter.

Integrate third-party, office desktop tools such as Microsoft® Excel, Word and Outlook for additional analysis and reporting capabilities. Client Portfolio is a separately licensed module.

System Requirements

Requires ProVantage® Central

ProVantage Software, Inc., 4040 Lake Washington Blvd. NE #208 Kirkland WA 98033
Phone: 800-843-2188, Fax: 425-828-6080
E-mail: sales@provantagesoftware.com, Web site: www.provantagesoftware.com