PROLAW
THE COMPLETE INTEGRATED SOLUTION TO MANAGE YOUR ENTIRE FIRM
Today more than ever, law firms need to run leaner and run smarter. Competition is stiffer, clients are more demanding, and budgets are limited. To compete with and stay ahead of the competition, your entire team needs to work efficiently and effectively together. You need a complete solution that is integrated: a solution that combines client and matter management as well as time entry, billing, and accounting. Your staff needs up-to-date information and instant and easy access to the data and tools they need—when they need them.

The ProLaw® comprehensive business management solution faces these challenges head-on by enabling small and mid-sized law firms to fully automate the practice and manage the business of law. ProLaw streamlines and automates your processes, maintains and improves profitability, and meets your growth expectations by integrating all four major areas of firm investment, including financial management, client & matter management, risk management, and business development. In short, it gives you the tools you need to manage the entire matter lifecycle from beginning to end.

Imagine entering data just once and having it propagate for other areas to share, while managing your firm in one place aided by integration with Microsoft® Outlook®, Word, and Excel®. As a fully integrated law firm software solution, ProLaw helps you coordinate all functions from matters and contacts to time entry, billing, and accounting.

Enhanced business management capabilities provide you at-a-glance business metrics while measuring performance, so you can keep a real-time pulse on your business. When you need legal research or dockets, access Westlaw® without leaving ProLaw. Don’t worry about security, as built-in controls ensure your data is secure and kept confidential.

ProLaw eliminates data silos and connects your entire organization. This true integration produces more efficient workflow, maximized efficiency, and increased profitability, so you can do more with fewer resources and confidently tackle today’s challenges as well as tomorrow’s.

**WITH PROLAW, YOU CAN:**
- Boost profitability by working more efficiently and billing more hours
- Maximize firm efficiency and lawyer productivity with software that works the way you do
- Streamline data entry through a single, intuitive, easy-to-use platform
- Manage the entire matter lifecycle to service clients more efficiently and effectively
- Improve decision making through business management functionality that provides real-time business intelligence about the health of your firm
A SINGLE, INTEGRATED DATABASE

Built on the .NET platform, ProLaw helps you simplify your practice and enhance productivity firm-wide. The single database integrates your accounting and billing system with your case and client information, which eliminates redundant data entry and lets you use the data in far more meaningful ways. In addition, your staff benefits from a familiar interface through the comprehensive integration with Microsoft Outlook, Word, Westlaw research, court rules, and many other popular applications.

ON-PREMISE OR CLOUD DEPLOYMENT

Organizations can benefit from the full power of ProLaw and have a choice of on-premise or cloud deployment based on their business needs and preferences. For on-premise deployment, ProLaw features an n-tier architecture that scales to meet your organization’s needs. The subscription pricing and hosting services offered through ProLaw Cloud, powered by CenturyLink®, makes it easy for your firm to manage costs and scale to meet your changing needs.

MICROSOFT OUTLOOK AND OFFICE INTEGRATION

Because we know the programs in which your lawyers spend the majority of their time working, ProLaw is fully integrated with Microsoft Outlook and the Office suite of products. This tight integration lets staff work in the programs where they’re most comfortable. A direct connection to Outlook and many convenient features allow you to truly automate your workflow and increase productivity and efficiency.

- Keep all information in one place
- Gain more billable hours with automatic pop-ups that prompt for time capture
- Link documents and data information directly from Outlook to ProLaw

PROLAW PORTAL

You can manage all aspects of your firm from any location and bring all staff online remotely from a Windows® desktop or Internet Explorer® via ProLaw Portal. Now, matter, relationship, and document management and time tracking are available anytime, anywhere.

- Stay current with events, tasks, and deadlines that are entered in the system and automatically synchronized with Outlook
- Clients can view matters and check documents in and out via the Internet
- Lawyers can easily enter hours to capture more billable time
- Add matters, event notes, and trust notes when communicating with clients

The ProLaw Dashboard

A main feature in ProLaw’s industry-leading approach, it provides a single access point to each key function that everyone in your office needs.
PROLAW MOBILE

Gain access to data, input information, and enter time directly into ProLaw from anywhere and at any time with ProLaw Mobile. Using your iPad®, iPhone®, or Android™ device, you can enter, review, and edit time worked for immediate entry into ProLaw with real-time mobile access.

• Retrieve contact information and view current matter information
• Update matters by adding notes
• Keep calendars current and respond to clients in a timely manner
• Save emails and attachments
• Conduct full-text searches to easily find and access documents
• View billing statements

BUSINESS MANAGEMENT

Get instant access to real-time business metrics that will help you make informed business decisions. Provide business intelligence for management and lawyers through easy-to-view management and user dashboards. Snapshots and drill-down capabilities of key business metrics, such as Top 10 Work in Progress, Total Accounts Receivable, Total Work in Progress, and more, eliminate the need to run reports by providing management with important data at their fingertips. Individual users can easily manage their book of business and monitor performance indicators in a single view from the user dashboard. View reporting metrics like Fees Per Month, Current Work in Progress, YTD Fees, and more in easy-to-read charts and graphs.

BIPRO

ProLaw firms also have the advantage of utilizing BIPRO™, which integrates seamlessly with ProLaw Back Office to provide a financial analysis dashboard detailing seven KPI’s (Key Performance Indicators) identified by law firm managing partners. Developed by Advanced Legal, BIPRO uses patented visual technology to display data in easy-to-use interactive charts. BIPRO offers the unique ability, based on security settings, to change views from firm-wide to originating or working lawyer, as well as define results by area of law. Several customization capabilities make it possible for lawyers and non-financial managers to easily interpret and act on key financial metrics. BIPRO also includes SSRS reports with new releases scheduled quarterly.

FIRM-WIDE REPORTING

Knowing what is happening in all corners of your firm is vital to managing expenses and productivity. ProLaw’s reporting tools capture information on all activities, so you can analyze data quickly in standard and customized reports.

• See in real time what’s happening with staff efficiency, deadline management, and cash flow
• View details and change parameters on the fly
• Interpret and present information using charts and graphs
• Customize reports for desired content and format, or use an array of standard reports
• Create and edit reports with the ability to drag and drop information from all areas of ProLaw
FINANCIAL MANAGEMENT

At the heart of ProLaw is industry-leading functionality that helps you streamline and automate your financial management processes to improve efficiency and increase profitability. Easily manage your accounting, time and expenses, invoicing, contingency analysis & disposition, and payables management from one robust solution.

ACCOUNTING MANAGEMENT
Maximize the productivity of your financial and operations staff with powerful tools that help you streamline, organize, and automate your core accounting functionality.

- Manage your general ledger, accounts payable, and accounts receivable functions
- Easily check accounts receivable, trust, retainer, and work-in-progress balances
- Gain valuable insight into your firm’s business and profitability through powerful financial analysis reports
- Break out the data by lawyer or practice area for profit center financial reporting
- Maintain books on a cash, modified cash, or accrual basis
- Simplify the budget process and align business activities with goals and objectives

Payables Management
Take control of all your liabilities, costs, and charges in a single system. ProLaw’s payables management has the sophistication and flexibility to make payments with unmatched efficiency, improve cash management, control expenses, and increase your bottom line.

- Support write-offs and management of unapplied cash
- Save time with automation features that let you attach invoices to accounts payable entries
- Accelerate the entire payment cycle with check-approval workflows
- Robust inquiry and reporting tools help ensure you’re controlling costs most effectively
- Track and manage vendor relationships and payments
- Easily scan invoices or receipts into the system
- Benefit from numerous payment options, support for multiple checking accounts, account-split capabilities, and the ability to make partial payments or pay at the matter or client level

Collections
Our specialized collections module ensures you get paid on time for your services. Manage your firm’s accounts receivables and utilize tools and tracking to help subrogation firms collect external debt.

- Improve cash flow by closely monitoring outstanding receivables before they’re at risk
- Maintain client relationships with consistent communications on aging receivable accounts
- Access case, debt, payment, and contact information quickly to track subrogation collections
- Ensure successful external collections by automating debt tracking
- Streamline workflow with payment schedules

TIME AND EXPENSE MANAGEMENT
Sophisticated time and expense tracking tools are built into ProLaw to help you streamline the capture of daily activities. With more accurate and automated tracking, you can increase billable hours and recoup client cash, ultimately leading to increased profitability.

- Flexible and convenient timers automatically capture billable time from all key applications such as Outlook, Word, Excel, and Adobe® Acrobat Reader®
- Pop-ups prompt lawyers to submit time as they work on billable hours
- Enter time from Internet Explorer or your mobile device
- Easily convert activities or events into time entries
- A convenient dashboard check request form for expenses automatically creates an accounts payable record
- Set default prices for expense types to speed up data entry
INVOICE MANAGEMENT
ProLaw’s invoice management tools help you achieve better billing practices and a stronger bottom line. Using the powerful and innovative transaction and reporting capabilities, you can improve invoice creation and distribution, shorten billing cycles, and satisfy your customers’ unique billing requirements.

- Streamline bill processing to produce timely and accurate invoices for print or electronic distribution
- Easily customize invoices using built-in formats and drag-and-drop customization
- Meet hourly, flat fee, or alternative fee arrangements
- Save countless hours of manual data entry by automatically splitting billable hours and expenses across multiple matters or billing parties
- Eliminate the possibility of errors and ensure bills are accurate before printing with pre-invoice generation and editing tools
- Meet both your clients’ and the firm’s needs with highly configurable billing setup of rate levels, rate overrides, billing frequencies, and more

CONTINGENCY ANALYSIS & DISPOSITION
If you handle cases on a contingency basis, you know the challenges it can present. ProLaw’s comprehensive financial management system helps you meet the special accounting requirements with ease.

- Continually monitor, calculate, and manage case settlements quickly and efficiently
- Intuitive worksheets let you calculate client and firm net under different settlement scenarios
- Easily automate and manage settlement analysis, lien tracking, mass settlements, and more
- View real-time status and current charges at any time
- Sophisticated tools keep track of lienholder and payment amounts and co-counsel percentages
- Get support for tiered percentage settlements

CLIENTPAY
If you accept credit card payments, ClientPay® is an add-on software solution that seamlessly integrates with ProLaw. It is powered by Persolvent and provides a single point of entry for credit card payments and receipts. Your firm can now accept payments via credit cards and post those transactions directly in the ProLaw accounting system. ClientPay can turn card acceptance from an error-prone, time-intensive task into an efficient, accurate, and cost saving process.
Whether you’re looking at the big picture or are handling the day-to-day details, ProLaw makes it easy to manage your client information and matters throughout the entire lifecycle—from start to finish. ProLaw’s robust Client & Matter Management capabilities give you the tools to effectively monitor the information that matters. And, because your client and matter information is fully integrated with your accounting and billing system, the shared information can be used in meaningful ways.

ProLaw transforms the way you manage your daily activities by unifying all of your important tasks and data into one integrated solution. Easily retrieve and file all the data you need—from appointments, to emails, to reference materials—from any Windows desktop or Internet Explorer.

Sophisticated tools help you create documents and organize them for storage in one central, secure repository for easy access. In addition, you can easily pull in research by connecting to Westlaw directly from the ProLaw desktop. With all the vital information you need at your fingertips, you’ll improve collaboration, consistency, and productivity across your firm.

CASE AND MATTER MANAGEMENT

Fully automate and streamline information storage and get immediate access to the important information you need, when you need it.

- Manage all of your case and matter information in one simple, integrated solution
- Save time and enter information only once with comprehensive integration into your financial management solution
- Lawyer dashboard helps centralize information and provides one-click actions, calendar view, and reminders
- Perform legal research with instant access to Westlaw
- Track, cross-reference, or relate matters and parties to each other
- Automatically synchronize case activities and deadlines with Outlook

DOCUMENT MANAGEMENT

Improve the consistency and streamline the organization of your firm’s vital documents. A secure, centralized repository offers fast document retrieval for convenient access to the information you need.

- Create and store electronic documents, videos, pictures, audio files, and more by client, matter, event, or other key information
- Advanced searching tools simplify file search efforts
- Easily file emails and their attachments
- Connect any file type to a matter and/or client with drag-and-drop tools
- Cross reference documents to multiple matters and contacts and related documents to events and other documents

DOCUMENT ASSEMBLY

ProLaw’s intuitive document assembly tools help you simplify the production of documents, reduce data input errors, and create a valuable repository of your organization’s critical documents.

- Improve the accuracy and speed of document generation
- Document production is completely integrated with the ProLaw document management system and docketing calendars
- Develop sophisticated templates and custom forms with drag-and-drop fields while easily merging information from the ProLaw database
- Integrate with Microsoft Word
- Automatically convert documents into a PDF
EMAIL AND ELECTRONIC FILE MANAGEMENT

ProLaw’s integration with Outlook lets you easily manage the large volume of emails and electronic file attachments your firm receives on a daily basis. Find and share information across your firm with just a few clicks.

- Search, retrieve, and organize your emails and related attachments with ease
- Each email and attachment can be organized by client, matter, date, or type
- A lawyer-friendly Outlook view gives you direct access to ProLaw information from Outlook, allowing easy editing
- Pro File emails and attachments directly from Outlook to ProLaw
- View real-time ProLaw matter information and read documents and other event information from Outlook
- Convert documents to PDF on the fly and attach to an email when saving as a ProLaw document

PRACTICE AREA MODULES

ProLaw’s practice libraries are backed by 20 years of consulting and a strong partnership with Westlaw and are based on the best practices used by our clients. Utilize practice-specific custom tabs, reports, and example forms.

- Bankruptcy
- Contracts
- Corporate Secretary
- Estate Planning
- Immigration
- Insurance Defense
- Intellectual Property
- Labor
- Legal Opinion
- Legal Services Matter Intake
- Licensing
- Litigation
- Personal Injury
- Probate
- Real Property
- Workers’ Compensation

IN-CONTEXT LEGAL RESEARCH

It’s never been easier to perform legal research from within the case you’re working on in ProLaw, which works with Westlaw.

- Search numerous Westlaw databases related to your matter with one click
- Automate steps in your search process to save time
- Import charges directly from QuickView+® to easily bill clients
- Directly link to the actual court rule and the editorial enhancements of Westlaw
- Pro File Westlaw results to matters or clients in ProLaw
RISK MANAGEMENT

Today’s legal landscape is constantly changing, and we know that with that change comes risk. In response, ProLaw provides tools to help mitigate your risk, so you can go about conducting business as usual—confidently and safely. From business intake, to contact management, to docketing and calendaring, ProLaw’s risk management solution helps protect your firm and your clients. Delivered in a single, integrated system, ProLaw eliminates data silos. By combining front office functionality with back office financial management applications, we’ve increased visibility and have given you a better way to manage your financial management and regulatory activities.

CONFLICTS MANAGEMENT
Now you can efficiently analyze prospective clients to decide whether you should accept or decline work by easily identifying potential conflicts before you begin the work.

- Instantly search database contacts and fields in your database
- Check new contacts and their relationships against the existing database
- Search records through multiple criterion
- New parties and relationships are easily added to the database for future searches

RECORDS MANAGEMENT
Access and maintain records while protecting your firm from unwanted risk through the proper maintenance of your files. ProLaw’s records management capabilities reduce legal, regulatory, and compliance risks and safeguard your physical files.

- Efficiently manage your physical file inventory
- Put the proper plans in place for storage, retrieval, and disposition of files
- Automated recordkeeping tracks the status, history, location, and who accessed the physical files
- Get an up-to-date status on any document with check-in and check-out procedures
- Match electronic records to physical files for faster information gathering

RULES-BASED COURT DOCKETING AND CALENDAR MANAGEMENT
Confidently manage all of your appointments, tasks, deadlines, and details and stay on top of key information. ProLaw’s powerful rules-based court docketing and case management tools reduce missed deadlines, keep you current, and lower your overall risk.

- Manage all dates, events, and documents related to a case in one place
- Automatic synchronization between ProLaw and Outlook tasks and appointments keeps you organized
- Point-and-click calendar provides full views for easy scheduling
- Create your own custom rules or import applicable court rules from Westlaw legal calendaring rules
- Westlaw legal calendaring rules have been combined with ProLaw’s powerful docketing and case management capability to provide a comprehensive legal calendaring solution
- Reduce risk by avoiding missed critical court deadlines
- Stay current with timely rules updates and turn to specialized rules sets to meet your needs
Give your firm an edge with ProLaw’s client and contact management tools. You can streamline your contact essentials, so you don’t miss anything that may lead to new business. An up-to-date database of clients, prospects, and relationships makes it easy to manage clients, cases, and marketing activities. You can build a complete record for each contact, including multiple addresses, phone numbers, and financial and matter information and automatically sync lawyer’s Outlook contacts with the ProLaw system. With all of this critical contact data in one place, you can easily build your pipeline and streamline your business development activities.
THE SOFTWARE FOR EVERYONE IN YOUR OFFICE

ONE OFFICE

FINANCIAL MANAGEMENT
- Accounting Management
- Time and Expense Management
- Invoice Management
- Contingency Analysis & Disposition
- Firm-wide Reporting

CLIENT & MATTER MANAGEMENT
- Client Management
- Case and Matter Management
- Document Management
- Document Assembly
- Email and Electronic File Management
- Practice Area Modules
- In-context Legal Research

RISK MANAGEMENT
- Conflicts Management
- Records Management
- Rules-based Court Docketing and Calendar Management

BUSINESS DEVELOPMENT
- Client and Contact Relationship Management
As the integrated comprehensive business management solution for your firm, ProLaw helps you automate the practice and manage the business of law—from beginning to end. No matter what your role is in the process, ProLaw delivers the benefits and functionality you need to successfully perform your job.

**Executive Directors and Managing Partners**
Help your team work more efficiently and bill more hours, so you can run your firm more profitably.

As an executive director or managing partner, you expect technology to support you in running your firm more profitably. Only ProLaw integrates Microsoft Outlook, Word, and Westlaw to help you organize information flow and manage your firm in cost-efficient ways never before possible.

- Analyze how well your firm is performing from a completely integrated suite
- Rely on up-to-date data and key metrics such as fee analysis, financials, and profit indicators to reveal your most profitable clients, matters, and practice areas
- Run your business on the industry-standard Microsoft .NET platform and adapt to your changing needs easily
- Improve your bottom line and extend your investment well into the future

**Lawyers**
Accomplish more and easily manage your day with software that works the way you do.

You’re a lawyer managing dozens of cases in different stages with deadlines, documents, and pressures coming from multiple directions. You need legal case management software that works the way you do. With sophisticated tools that are accessible in common everyday programs and from a mobile app, ProLaw delivers.

- Increase efficiency and effectiveness with ProLaw’s unique integration capabilities
- Track deadlines and deliverables, save and retrieve documents, and view real-time ProLaw matter information from within Microsoft Office applications
- Access key functions from your iPad, iPhone, or Android device with ProLaw Mobile
- Get legal research and dockets from Westlaw with a simple click
- Enter and track billable time with pop-up prompts directly in Outlook, Word, Excel, and Adobe Acrobat and Reader

**Finance Managers**
Ensure accurate and efficient accounting, time, and billing to maintain a smooth-running and profitable firm.

When you’re in finance, you’re always under the spotlight. From managing pre-bills to cutting checks to running reports, ProLaw keeps your system running smoothly—with no surprises. And its accuracy, efficiency, and adherence to standard accounting practices helps you maintain a profitable organization.

- Close and balance the month with ease
- Manage pre-bill and billing functions, as well as accounts receivable and payable with new efficiency
- Provide input to aid decisions with real-time metrics and “what-if” analyses
- Quickly view financial performance and business status with charts and graphs
**IT Specialists**

Efficiently run your firm with proven technology that delivers unmatched stability, support, and integration capabilities.

You're in charge of IT, and you want best-of-breed applications that work together and use proven technology like Microsoft SQL. As the nation’s leading legal business management software, ProLaw delivers on the .NET platform, the standard for interoperability of Microsoft applications. With its power, you can confidently, efficiently, and effectively run the firm.

- Seamlessly integrate with the rest of your applications
- Be assured with a proven track record of stability and support
- Run efficiently with industry-standard technology
- Bring everyone up to speed quickly and seamlessly with the Microsoft applications that can be accessed from mobile devices with ProLaw Mobile

**YOUR PARTNER FOR SUCCESS**

Thomson Reuters Elite offers an end-to-end Enterprise Business Management Solution that allows law firms and professional services organizations to run all operational aspects of their firms, including business development, risk management, client and matter management, and financial management. As an industry leader for organizations across the globe, we understand the business and financial aspects of firm operations, and we have the tools to streamline processes, improve efficiencies, and provide the flexibility you need to change and grow your business.

For a complete list of ProLaw features, visit ProLaw.com.