



ELITE 3E COLLECTIONS

WITH ELITE 3E COLLECTIONS YOU CAN:

- Remain informed on the current status of all outstanding collection items with timely notification of collection steps and thresholds
- Shorten collection cycles with improved visibility into all aspects of collection items
- Reduce firm exposure to credit risk by continuously monitoring the firm's credit risk exposure in any situation
- Streamline and automate manual processes with advanced workflow and collaboration capabilities
- Increase firm cash flow and profitability by maximizing efficiency and reducing losses

IS YOUR COLLECTIONS PROCESSING KEEPING UP?

In today's fast-paced marketplace, professional services firms need to have efficient and robust processing systems to increase positive cash flow while delivering more effective customer service. ELITE 3E® Collections provides these solutions—all within one desktop screen.

Collections gives firms the ability to view collection status and billing information in real time. Collections is fully integrated with 3E Invoice Management and gives attorneys and staff convenient access to all the information they need in one screen, with the option to drill-down into more detailed invoice and client information.

Collections is an integrated component of the 3E Business Optimization Suite, a powerful business process platform designed specifically for legal and professional services firms. 3E provides core financial management and practice management features along with built-in application development capabilities that help transform your firm's unique business processes to achieve strategic advantage.

The world's leading law firms have turned to industry-standard software like ELITE 3E to improve processes and boost profitability. With more than 60 years of experience, Elite has the proven expertise to make it happen for you.

CONSULT THE EXPERTS

Elite has consistently been an award-winning provider of financial and practice management solutions to global professional services firms.

ELITE 3E COLLECTIONS

KEY FEATURES OF ELITE 3E COLLECTIONS

- Web-based collections management and consolidated view
- Comprehensive real time integration with 3E financial and practice management applications
- Multiple workflows and collaboration processes automate and shorten collection cycles
- Set custom events and notifications with advanced calendar scheduling
- Powerful built-in reporting and metrics provide increased visibility into every aspect of the collections process

FULLY INTEGRATED SOLUTION

- Complete integration enables automatic updates whenever information is updated in other 3E applications
- Client payment, current collection status and activity can be accessed from within relevant screens, allowing users to track the status of all invoices
- Collectors can easily access relevant client and matter information including account history, WIP billing information, open invoices, invoices in collection, current overdue amounts and the most recent cash posted

CONSOLIDATED VIEW

- Provides a summary of relevant collection details and drill-down capabilities within a single screen
- Users can instantly view all open invoices, then drag-and-drop different parameters such as collection client, matter, collector or invoice status to design a custom layout
- Once the information is displayed on screen, it can be easily circulated via email or print format

SUPPORT BUSINESS GROWTH

- Effectively manages the activities of multi-national firms and national firms spread out over multiple offices and practice groups
- Full support for complex company structures, as well as multiple languages, currencies and date formats
- Using the 3E Document Composition Service or Crystal, firms can design customized collection correspondence including reminder statements, letters and emails

MANAGE COLLECTION STEPS

- Collections can run processes to create collection items by invoice, client, matter, payor, billing group or billing address
- Client and matter information, invoice details and account history are available on the collection item screen
- Collectors can view unbilled WIP, trust balances, doubtful amounts and write-offs, with current amounts displayed in real time
- Follow-up actions can be automatically created for when unscheduled payments are not made in time

ASSIGN MULTIPLE WORKFLOWS AND PROCESSES

- Firms can create a default workflow and global threshold from the Collections control panel
- Groups can be defined by client, matter, collecting office, invoice status or other criteria as needed
- Firms can easily set exceptions for specific clients, matters or offices, and at the same time maintain automated, standardized collection procedures

SET COLLECTION EVENTS AND NOTIFICATIONS

- Collection events trigger email notifications to attorneys, firm management or collectors at different stages in the collection process
- Email notifications can be sent one at a time or in a daily digest for review
- Firms can set a wide variety of collection events, including workflow steps, reminders for follow-up actions, receipt of payment, write-off approval or rejection, and thresholds
- Using an intuitive event scheduler, users can easily set up collection event criteria, tasks or steps to be performed, timeframes, frequency setup and staff notifications

Collection Item

Invoice	Invoice Date	Payor Name	Invoice Currency	Exchange Rate	Receipt Amount	Open Amount
> 0100212	7/12/2006	AIMRRG, INC.	USD		3,000.00	0.00

When a cash receipt is posted to an invoice in collection, current amounts are displayed in real-time.

Calendar and Tasks

The screenshot displays the 'Collection Action Calendar' for June 2007. It shows a grid of dates with various collection actions scheduled. Below the calendar, there is a table of 'Invoice Collection Item' details, including fields for Number, Type, Description, Client Nbr, Due Date, Collection Total, Curr, and Collector. A 'Collection History' section is also visible. On the right, a 'Scheduled Collection Actions' window is open, showing a list of actions with columns for Scheduled Date, Action By, Action Type, Step Nbr, Call Date, Action, Number, Type, and Description. The actions include tasks like 'Phone payor', 'Follow-up email to client', and 'Email client'.

The calendar displays upcoming tasks and events; click on a date to display a daily work list of open items or to view a report.

WORK SMARTER WITH CENTRALIZED INFORMATION

- Collectors can quickly view all open tasks or group collection items by matter, client or collection status and drill down into collection details
- Collection Calendar keeps track of daily collection tasks and provides managers with a viewpoint to all collection activity
- Narration windows enable firms to document disputed accounts or write-offs, reducing liability

ANALYZE AND REPORT COLLECTION STATUS

- Flexible inquiries allow users to search for information using a variety of pre-set parameters, and filters can be applied to deliver a more relevant subset of information
- Metrics deliver multi-dimensional information that users can slice and dice with drag-and-drop ease to hone in on key areas of interest
- 3E reports can be run on specific workflow progress; overall collection status by office location, practice area and timekeeper; client-level summary collection receipts with links to supporting detail; collection promises and collector statistics

EMBEDDED WORKFLOW AND COLLABORATION

Embedded workflow capabilities allow firms to streamline, automate and track the progress of a collection item from start to finish. With these flexible capabilities, users can collaborate with one another to effectively manage collection items.

PERSONALIZED FOR YOUR BUSINESS

Rapid application development capabilities in 3E allow firms to employ a Software Factory approach to personalizing solutions, resulting in a reduced total cost of ownership. Firms can modify screens to use unique terminology, adapt work processes to match the way the firm operates, and create additional database tables to link data with external applications or data sources. All of these changes remain intact when firms upgrade to the next version of 3E.

ROBUST SECURITY AND AUDIT CAPABILITIES

Powerful 3E platform security ensures that only users with appropriate rights can retrieve information. Access to client, matter or project master files can be restricted to firm-defined groups or individuals, and comprehensive audit controls provide a full history of all changes.

Collection Control Panel

The screenshot shows the 'Collection Control Panel' with various configuration options. On the left, there is a 'COLLECTION GROUP SEARCH SEQUENCE' section with fields for Matter (2), Client (1), Payor (3), Billing Tkpr, Supervising Tkpr, Section, Matter Department, Billing Tkpr Dept, Practice Group, Matter Office, and Billing Tkpr Office. The main area contains settings for 'Default Collection Group' (Finstein-standard), 'Manage Collections By' (Client), 'Add New Invoices to Existing Open Collection' (checked), 'Select Invoices Where Today Is' (Greater than or equal to invoice due date), 'Initialize Collection Contacts To' (Client Contacts), 'Use Related Client' (unchecked), 'Collection Threshold' (100.00), 'Threshold Currency' (USD), 'Currency Type' (Daily Rates), 'Conversion Date Type' (Due Date), and 'Default Collection Email From Address' (richard.benson@thomson.com).

Define rules and exceptions for how collection items are organized and created.

YOUR PARTNER FOR SUCCESS

Elite is a leading global provider of financial and practice management systems and consulting services to professional services firms. Elite is a business within Thomson Reuters (NYSE: TRI) and is comprised of a team of experts with decades of experience working with some of the largest firms in the world. Elite is a Microsoft® Gold Certified Partner.

To learn more about the latest release of ELITE 3E Collections or for a global list of office locations, call **323-642-5200** or visit **elite.com**.

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