3E PAPERLESS PROFORMA

KEY BENEFITS OF 3E PAPERLESS PROFORMA

• Streamline and expedite the review process for improved cash flow
• Reduce paper usage and costs within the pre-bill workflow
• Increase productivity with filtering, reporting, and scenario calculations features
• Review proformas securely while out of the office without transporting confidential, printed documents
• Expand visibility of productivity and profitability with a wide range of pre-built reports for managerial review and analysis

Legal and professional services firms everywhere are facing increasing pressure to reduce wasted resources and replace time-consuming manual processes, while consistently improving cash flow. 3E® Paperless Proforma™ from Thomson Reuters Elite is an intuitive, browser-based pre-bill distribution and mark-up solution that lets you reduce the chance of human error, speed the pre-billing process, and get invoices out the door faster.

Paperless Proforma works with 3E to replace or supplement cumbersome and time-consuming paper-based proforma distribution and mark-up procedures for both fee earners and accounting staff. Fee earners can review proformas while out of the office without needing to transport confidential, printed documents, and the web-based interface lets lawyers make changes online then send them back to accounting instantly. For staff members, Paperless Proforma is easy to learn as it mirrors accepted proforma mark-up conventions, and the ability to switch between fee earner profiles without entering and exiting the system increases ease of use.

Not only does Paperless Proforma improve the financial management time cycle, it provides sophisticated auditing, tracking, filtering, and reporting capabilities. Staff can now monitor the pre-bill process with at-a-glance viewing that gives them the information they need in order to track fee earner productivity and instantly learn the status of reports. In addition, management can view top-level statistics on open, submitted, and archived pre-bills to stay on top of productivity and profitability.
3E PAPERLESS PROFORMA HIGHLIGHTS

- Pre-bill data is acquired from 3E and becomes readily available for the billing lawyer
- On-screen edit process ensures edits and instructions are both readable and implemented accurately
- Fee earners can run different scenario calculations to achieve the correct balance in compliance with the firm’s billing policies
- Users can filter and group pre-bill work lists by date, status, clients, dollar amount, and much more
- Integration with eBillingHub® allows users to validate for e-billing errors that might cause bills to be rejected, and correct them on the spot
- Audit trails can be created that allow for compliance with government regulations
- Fee earners are able to defer pre-bills directly to archives, reducing the steps in the process and reducing accounting’s workload
- Administrative staff can easily switch between fee earner profiles without entering and exiting the system
- The number of pre-bill reports and the total financial value per fee earner in the firm can be monitored
- Reporting capabilities allow you to drill down into the details of specific pre-bills to learn who the owner is and its status
- A shared summary gives real-time updates as to how edits to hours or amounts will affect the outcome of the bill
- Tracking tools enable you to track all narrative and status changes made to each pre-bill
- Interface mirrors traditional paper pre-bills, making the system easy to learn and use
- Unique productivity features help improve firm performance
- Sophisticated collaboration features, allowing fee earners to work together (either parallel or sequential) at the matter level
- Superior flexibility backed by configurable workflows, enables the solution to work the way your firm works
- Built-in, configurable, and automatic approval routing

To learn more about 3E Paperless Proforma or for a global list of office locations, visit elite.com.