

What's New in 3E

DELIVERING ENHANCED INTEGRATION, STREAMLINED TASKS, AND LESS MANUAL WORK

Streamlined functions, improved billing, and more automation are just some of the key enhancements you get with the latest release of 3E®. As part of our commitment to giving you the tools you need to succeed, we've made several enhancements across the 3E portfolio of products, many of which are a direct result of our customers' requests. In addition, we have continued to focus on standardization improvements to minimize the number of client customizations, saving you time, effort, and costs. With improvements to electronic billing integration, time entry, fixed fee setup, and more, 3E 2.9.1 enables your firm to perform more functions faster and easier.

KEY HIGHLIGHTS

- **Enhanced eBillingHub® integration.** Save time and eliminate the need to move between platforms with enhanced eBillingHub and 3E integration for proforma submission.
- **Key time entry feature enhancements.** Experience faster, more efficient, and intuitive time entry.
- **New Firm Field Configuration process.** Reduce the time, costs, and effort needed for adding new fields to 3E.
- **Improved 3E Paperless Proforma™.** Enjoy a faster, more streamlined proforma editing experience.
- **Fixed Fee Bundles.** Eliminate hours of manual data entry with predefined time, cost, and charge bundles.

The screenshot displays the Thomson Reuters 3E Workspace interface. The main dashboard area features a 'Matters' table with columns for Matter, Matter Name, Client, Billing Fee Earner, Open Date, Close Date, and Action. Below this is a 'This Week's Time' table with columns for Timer, Hours, HH:MM, Matter, Matter Name, Client, Narrative, Work Date, Status, and Action. On the right side, there is a 'Tasks' sidebar with a list of tasks: '3E Time Modify Time Card Update', '3E Matter Notes', '3E Payer Payer', and '3E Entity Entity Maintenance'. A red callout box highlights the 'Tasks' sidebar, showing a dropdown menu for sorting options: 'Start Date', 'Modified Date', 'Due Date', 'Name', and 'Description'. The interface also includes a 'Post Time by Client' section with a pie chart and a 'Dashboard' header.

Updated navigation in Workspace improves the user experience and provides additional task sorting options.

ENHANCED eBILLINGHUB INTEGRATION

Submit a proforma directly from 3E to eBillingHub to validate and correct errors before submitting the final invoice to ensure full and prompt payment.

- Continued 3E and eBillingHub integration allows billers and e-billing specialists to operate within 3E rather than moving back and forth between 3E and eBillingHub
- Billers can submit proformas directly from 3E to eBillingHub for submission to clients/e-billing vendors for review
- Correct billing guidelines issues or errors prior to submission of the final bill, helping to speed up billing payments and ensure bills are paid in full without rejections from vendors

FIRM FIELD CONFIGURATION

Eliminate the need to customize 3E using the integrated development environment by allowing new fields to be added directly through the 3E user interface, reducing the time, cost, and effort needed for a basic configuration change.

- Save time, cost, and effort by quickly adding desired fields to grid views
- The ability to add fields to forms will be available in an upcoming 3E User Interface release this year

TIME ENTRY ENHANCEMENTS

Time entry is quick and efficient and provides users with more control over their experience, including display of personal time filters, sorting options, and the ability to switch users.

- Time entry is more intuitive and user-friendly with updates such as the ability to post all entries from the calendar with one-click
- Additional updates include an improved look and feel so you can get more information with quicker navigation
- Personal time filters let you see the time elements that are most important to you at any given moment. Choose from any combination of Pending, Posted, Billable, Non Billable, Unassigned, and Missing time or the option to see none at all.
- Revamped Timekeeper Selection honors the "allow time entry for all timekeepers" option, eliminating the onerous task of regularly updating user-to-timekeeper mapping and making switching fee earners easy and efficient. The updated display also clearly identifies the current fee earner.

FIXED FEE BUNDLES

Set up and pre-define time, cost, and charge types bundles for highly repeatable and predictable work. Once assigned to a matter, all related entries can be created automatically, eliminating hours of manual data entry.

- Streamlines and automates the data creation and billing process for fixed fee work that is repetitive in nature by allowing 3E to automatically create and post entries, generate proformas, and, in an upcoming release, generate invoices with no proforma review or editing required
- Intended for highly repeatable and predictable work, bundles can be defined to effectively create pre-defined work entries and price lists or fee schedules for such work
- Manual time, cost, and charge entry is eliminated by automated creation and inclusion on proformas

PAPERLESS PROFORMA ENHANCEMENTS

Benefit from a faster, more streamlined experience with matter, proforma, and administrative options brought to the forefront.

- Proforma level reason codes can eliminate the need to update multiple, individual entries
- Matter Notes are brought to the forefront, resulting in more efficient review and fewer clicks

ADDITIONAL ENHANCEMENTS

- The ability to transfer collection items from one collector to another eliminates the need to manually transfer each item one by one
- Proforma Adjustments option eliminates manual calculations by including flat fee charges so flat fee adjustments will automatically be calculated and added to other proforma adjustments
- A standardized method to import and load data in generic format for vouchers and GL/journal statements makes importing external data faster and more cost effective
- The ability to set default contacts for Collections and Proformas eliminates the need for manual updates and alleviates mistakes
- Improved out-of-the-box stock templates add additional configurability to 3E Templates, minimizing the need to customize and reducing costs and implementation timelines

Contact your account representative or visit
<https://www.elite.com/whats-new-in-3E-2-9-1/>
 to learn more today.

