



## Integrated Time, Billing Accounting and Management System

### Overview

The newest product from AdvantageLaw, AdvantageXpress (**AX**) is an integrated accounting and management system is a powerful, low-cost, easy to use system that employs the very latest in technology. It ties the following functions together for a comprehensive and easy to use set of tools to help you run your business successfully.

- Timekeeping and Cost Recording
- Billing
- Accounts Payable
- Check Writing
- Accounts Receivable
- Trust Accounting
- General Ledger
- Financial Statements
- Management reporting
- Security
- Case Notes

Additional modules are available that complement the core **AX** system. They're integrated, so there's no need to re-enter the data from one system to another.

- Docket/Calendar
- Case Parties/Conflicts
- Cost recovery (phone, copy)
- Electronic Billing
- Palm Pilot Interface

The addition of docket/calendar and Parties/conflict of interest modules to the standard **AX** system makes it a complete, multi-function billing, accounting and case management application.

### Bridging the Gap

With **AX**, we wanted to bridge the gap between feature-driven sophistication and ease of use. Between tasks needed in solo practices and multifunction-oriented large firms.

We wanted to provide something different – something both aesthetic and practical, and priced well enough for any user to realize a considerable value. We think we've accomplished that with **AX**.

### Innovations

**Skins.** Put your own pictures right into **AX**. Your family, pets, scenery, whatever. It's like your personal desktop. And you can change them or add new ones.

**Favorites.** **AX** has hundreds of available reports, but maybe you only need certain ones. Just add them to your "favorites" list. Now they're instantly available to you.

**Experience Levels.** Whether you're an experienced **AX** user or just beginning, you can select the level that's right for you. If you need some guidance, **AX** walks you through a series of subtasks.

**Easy to Use.** **AX** uses Help to guide you through each form. Click on Help to read how to use the form you're working with.

Click on the Tutorial link to get a "how to do it" audiovisual demonstration and explanation on the form you're working with.

**Case Notes.** This completes the link to making your system complete. You can track case progress, discussions, negotiations, documents received and sent, and case time lines.

**Scalability.** You can go from one to over 100 attorneys without ever having to swap out your system or convert data.

**\$ 499.00**

### 3-User Network

You get a lot for a great price. You can add users and other features as needed. And **AX** comes with a 30-day money-back guarantee.



This example of an **AX** skin also shows the tasks and subtasks available. Power users click on the left hand list. The right hand list shows subtasks for each task and provides more guidance. You can mix and match tasks and subtasks as you see fit.

### Solid Firm, Solid Experience, Since 1981

AdvantageLaw has provided law office solutions since 1981. The Advantage-LM system was one of only 25 systems approved in the 80s by the ABA's Legal Technology section. **AX** is the culmination of years of experience, using input from its clients, to provide a sophisticated, easy to use management tool.

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## The Small Firm-Oriented Integrated Time, Billing Accounting and Management System

### Overview

AdvantageXpress (AX) integrated accounting and management system is a Windows relational database system that employs the very latest in technology. Designed and priced specifically for value and fast setup, it ties the following functions together for a comprehensive and easy to use system.

- Timekeeping and Cost Recording
- Billing
- Accounts Payable
- Check Writing
- Accounts Receivable
- Trust Accounting
- General Ledger
- Financial Statements
- Case Notes
- Security
- Management reporting

### Timekeeping and Cost Recording

AX utilizes a Timesheet control grid for quickly seeing your entire day of work laid out before you. You can selectively work with any time transaction in the grid, using timers if desired.



Time transactions are entered directly into the system by staff member, with pulldown search windows available for obtaining the desired matter and type of service performed. Exploding macro work codes provide a shorthand method of descriptive entry. The system also adheres to the

ABA Standard Task Code set. By way of its unique bill rate formulas, AX automatically finds the proper rate for the matter and performs the automatic extension. Spell checker is standard with the system.

All review, interactive editing and writedown/up of time, credit and cost transactions are performed within the same window as the time entry, thus eliminating the extraneous tasks of backing out of one program in order to initiate another.

### Billing

Matters can selectively be set up for billing approval by responsible attorney, billing attorney, area of law, client, or by user defined "due date" parameters. Transactions can also be written down or up, or can be selectively held and released.

There is also a new, "Quick-Bill" format that makes conventional billing a snap. You just select, print and update.

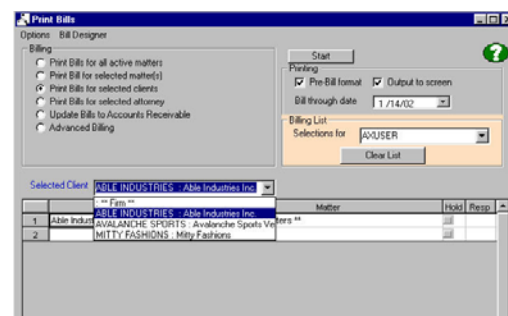
Billing comes in a variety of user defined formats, including several forms of narrative bills. Bill styles and information placement is user defined. Bill styles and heading can be custom fit for your firm's needs. Any bill can be run or rerun on demand. Interactive editing after bill print does not impact the bill process. AdvantageXpress also generates service charges and statements. Updated bills automatically integrate into accounts receivable, billing history, general ledger and attorney productivity files.

Bills can also be reversed ("un-updated") on demand, either individually or by group. This puts the billing information back to unbilled status, and removes the A/R and history information automatically.

Standard with the AX system is the ability to reprint a bill from archive, such as a bill run several years previously. This is done seamlessly and without impact to the billing and accounting system operation.

### Case Notes

Case Notes Manager is a flexible and very useful way to manage the status of your case work. Notes are classified by matter, subject, date and author. Narrative text is unlimited. Search parameters locate notes that deal with, for example, negotiations or documents.



Billing form is a one-stop place to approve bills and prebills, print and update bills into general ledger, bill history and accounts receivable.

From this form, you can bill all matters or selected clients and matters. An Advanced Billing form allows for user approval lists, special fee/receipts cutoff dates, date ranges, and other functions.

# Accounting Made Easy



The beauty of the AdvantageXpress system is its seamless integration. Entering data only once and having the system distribute the transaction automatically to all the affected subsystems is a priceless step in conserving your time and helping eliminate lost reimbursable costs. All transactions are reconcilable to the general ledger, insuring not only ease of use but accounting accuracy too.

## Accounts Receivable

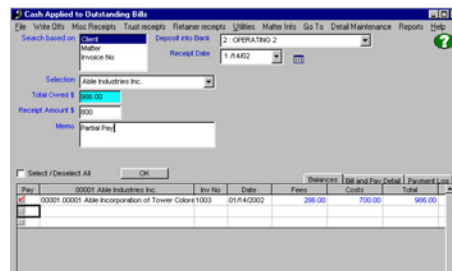
Receivables are on an open item basis. Cash can be applied by matter or by client. Application is automatic. Just click the bill to apply the cash. Advantage automatically distributes the cash into general ledger, receivable history and attorney cash allocation systems. Payment and adjustments can also be reversed on demand. Writedowns are also accommodated. Extensive audit trail reports are available for balancing deposits.

## Accounts Payable

Incoming vendor bills are handled easily via an internal voucher control system. Invoices are distributed to general ledger, 1099, open payable or check register, and client work in process systems automatically. Accommodates multiple bank accounts and profit centers. Accommodates trust disbursements. User can establish desired pay dates. System also handles recurring invoices, such as rent and note payments.

## Check Writing

Checks can be printed individually or by group, according to payment due date. Invoices can be un-approved or held. User defined check formatting is available. Checks can also be voided or reversed. Check reconciliation is part of the system.



Payments are recorded, including adjustments and attorney allocation. All reports and audit trails display from one single form, without the need to exit one function to get to the other.

## Trust Accounting

Trust receipts and disbursements are created through the integrated accounting subsystems. Separate bank accounts can be set up. Trust balances can print on client bills, as well as optionally disburse retainer funds to client billing.

## General Ledger

The system handles accrual and cash basis accounting, as well as both simultaneously. Chart of accounts is user definable. System can generate full yearly accounting detail as well as balance forward and monthly detail. Concurrent months and years can be held open without affecting the normal accounting flow of the firm.

## Financial Reporting

Formatting of statements is user defined. You can tailor your own statements with as much detail as you wish, like extra subtotaling or summarization. Accommodates budgets and previous year figures. Profit center financial reporting is included in the system.

## Management Reporting

AX has a host of management reports and graphs available to the user. In addition, there is a "My Reports" option that lets you select just those reports you use instead of having to select from the hundreds that are available. Database information can also be downloaded into other applications, including spreadsheet and files.



English-like user interface uses SQL technology behind the scenes to generate management information to your specific needs. Information can be exported to spreadsheets or other files.

# Features Into the Future



The WinVantage billing and accounting systems had more advanced features than any other system. AdvantageXpress builds on that base and adds much more. In short, you can tailor the system to run in your business environment without compromising anything. It has features like on-line tutorials that provide an audiovisual, step-by-step instruction. Experience Levels let you use the system either as a “power user” or as a layperson. Selectable “skins” let you customize your AX form with scenery or family members.

## Time/Cost Entry

- Timesheet format for easy manipulation of daily work items.
- Bill rate overrides (unlimited) for client & matter.
- Pull-down search windows. Search for matters by any word in the description.
- Unlimited transaction descriptions, with word wrap, move, insert, delete and copy.
- Exploding description macros to make composition of descriptive entry easier.
- Spell Checking.
- One-stop entry, edit and time review. On-line corrections.
- Audit by entry date, transaction date, user or timekeeper
- Global change of entries by rate, matter, timekeeper, date or work code.
- Point and click transaction holds and releases.
- ABA task code compatible, including billing.
- Ability to set multiple matter timers off and on for capturing billable time.
- Complete audit trail of holds, adjustments and deletes.

## Billing

- Bill selection by due date, client, billing attorney, matter.
- Individual user and temporary approve list options for quick or on-demand bills.
- Bill selections by exception. Mouse clicks can turn either all or individual approvals on or off.
- One-stop form to approve, print proformas, billings and updates.
- Override billing addresses or attention-to's.
- Split bill capability to allocate multiple payees, including address overrides and separate receivables.
- Reversal of individual bills or whole billing runs.
- Reprint old bills from archive, even years later.
- Variety of bill formats & styles, including narrative types. Wysiwyg style headings for font selection and wording.

## Accounts Receivable

- Open item based system.
- One-stop entry for cash receipts from bills, trust and retainer cash.
- Automatic cash application or individual overrides. Can click disputed bills off to prevent auto cash application.
- Allocates fee receipts by timekeeper or by user defined application formulas,.
- Automatic write-offs.
- Reverse or “undo” payments.
- Track by matter, client, fee type, area of law, attorney.
- Pull-down search windows.
- Automatic handling of trust and retainer receipts.

## Accounts Payable

- Open item based system.
- One-stop entry for disbursements and check printing.
- Integrated to automatically distribute disbursement into client billings.
- Can assign vendors to specific general ledger accounts.
- Can assign vendors to specific pay cycles.
- Can set up recurring disbursements (rent, etc.).
- Ability to void or redo check printing runs.
- Check formatting is user-defined.
- 1099 printing.
- Both cash and accrual based disbursement handling.
- Automatic handling of trust and retainer disbursements.
- Check reconciliations.

## General Ledger

- Accrual and cash basis accounting simultaneously.
- Concurrent months and years can be held open.
- Chart of accounts are user definable.
- Full yearly accounting detail as well as balance forward and monthly detail.
- User defined financial statement formatting, including print content.
- Multiple bank accounts.
- Budgeting by account or financial category.
- Profit center accounting.
- General and recurring journals.

## Management Reporting

- Reports can be either displayed or printed.
- SQL technology allows for user control of reporting, including selection, sorting and subtotals logic.
  - “My Reports” lists allow setup of frequently run or favorite reports by individual user.

## Case Notes

- Track by date, subject and author
- Unlimited narrative text
- Selectable parameter search routines to obtain just what you need.

# More Products



Why buy several different products, each with its own special way of operating and each with its own set of master files, when you can buy Advantage? Then you can use the same master files throughout. Eliminate having to maintain several systems. Plus, the applications integrate, and this saves you, big time, from a lot of extra work. AX lets you set up a case management system as well as an accounting system. All your work is in one place, and it all ties together

## Docket & Calendar

Calendars personal and firm related events and appearances. You can schedule several people to one event. AX lets you calendar several people to an event, yet also select only those individuals who will actually appear. You can set up docket "teams". By referencing the team in a scheduled event, all team members receive that information on his/her calendar. Jurisdiction patterns (court rules) allow you to set up related events, such as those associated with a trial. Set up or change the base date and all other dates automatically calculate. A "free time" pulldown icon lets you easily schedule meetings with other staff members. You can also print staff, firm or case calendars using a wide selection of parameters. Daily, weekly, monthly and yearly calendars are displayable at the click of the mouse. Complete with pull down menus and search windows for easier entry and lookup. And, of course, it integrates with the AdvantageXpress system, so you don't have to re-enter your master data.

## Conflicts

Search for up to 10 names at once to locate conflict of interest information. Can also search by relationship (plaintiff, expert witness) or side (for, against, neutral) or comments text to locate the relevant information. Through text comments, you can establish hierarchical relationships to locate related entities or people. Matter and client information is automatically integrated into the system, so you don't have to enter it each time for a new matter. There are comprehensive displays and reports available to find and analyze the information you have on hand.

## Contact Management

Set up your own database for items like client lists, expert witnesses, associating law firms. Names can be classified by type. AX can also automatically attach names in the contact management system to matter parties and conflicts.

## Cost Recovery Systems

Automatically interfaces photocopy, fax and phone charge systems into AdvantageXpress for billing to client. User can define per unit quantity rates. Works with most systems, such as Infotext, Equitrac and others. The system also uploads matter and client validation tables back to the cost recovery boxes.

Using the AdvantageXpress cost code data tables, you can set up unique per-copy rates by client and matter.

## Remote Entry

Allows users who are out of town or off-site to enter time from a computer, then send it electronically to the central site data base. Users can download the latest master validation tables at any time.

## Payroll

An interface into AdvantageXpress from most any present payroll system. This not only processes your payroll, but also interfaces the figures into the AdvantageXpress general ledger and financial systems.

## Bill Interfaces

WinVantage billing information can be formatted to specific file specifications and transmitted to the client or to third party fee and cost examiners. With AdvantageXpress, you have the ability to handle different bill interfaces for different clients simultaneously. We accommodate most examiners, such as LEDES, Nationwide, Chubb, ABSR/Honda, Lawtrack, CCIA/Align, Cosmos/BW, Infotext and others.



# **AdvantageLaw, Inc.**

## **The Company**

### **Background**

AdvantageLaw was founded in 1979 as a consulting firm specializing in systems design for midrange computer applications. It has been working in the legal industry since 1981, and is well regarded for its sophisticated time, billing and accounting systems. Over the years it has acquired an in-depth knowledge of this industry, and has designed specialized litigation and case management models for many large firms. In the early 1990's it began development of a comprehensive system geared especially for corporate and government law departments, with emphasis on case tracking and budgetary management.

AdvantageLaw has a national install base, and enjoys a reputation for easy to use, integrated software systems. The PC-based Advantage-LM time and billing system was one of only 25 systems nationwide that was approved by the ABA.

### **General**

The company is headquartered in the San Francisco area (Alamo, California). A branch office in Denver, Colorado, established in 1984, handles design, support, developmental and operational activities.

### **Philosophy**

AdvantageLaw has always been at the leading edge of systems design. It developed the first PC-based integrated accounting system for law firms (1983). It was the first company to implement a multi-user legal system for the

Novell network (1984), a system still in use today.

All Advantage systems are integrated. Each application ties into the other without the need for redundant entry. They allow easy interaction in real time between the computer and the user directly at the point of application. The system has made use of on-line help tools and search windows since the mid 80's.

Unlike many software providers who "freeze" their product design for many years, Advantage provides continual enhancement to its systems. This philosophy allows the software to stay current with latest technological changes.

### **People**

AdvantageLaw personnel possess solid management backgrounds, and are well versed in the workings of business. They have an uncanny ability to design from the potential user's perspective instead of the programmer's perspective. The result of this "Top Down" approach has been elegant, logical, easy to use, comprehensive systems.

### **Future**

We are always working on new technology, such as web based client/server, Palm and PDA interfaces, and ASP systems. We have also developed seamless migration paths to take our clients from earlier products and put them into its newer ones.

### **Our Commitment**

We strive to keep our company responsive to you, the user, and we strive to listen to your input on making the products better.

Our product philosophy is that of continuous change. Unlike many companies who freeze the design of the product once it's been introduced, we upgrade ours as we go. The result to you is a continuing up-to-date package, keeping up with the latest technological changes.

Through phone conversations and personal meetings, through electronic communication and via the Web, AdvantageLaw supports its clients with care and personalized service. We tend to think of our clients as extended family. In fact, a great many of our sales originate solely from referrals by our existing clients.

When you buy Advantage, we promise you the utmost in product capability, service and support. And we protect your investment by backing it up with a money back guarantee on any product in our line.

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