



# **Practice Manager Features**

## **ViewPoint Software for Business Ltd**

**Date: July 2010**

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## Feature Summary

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### q Multi Currency Sales and Purchase Ledger

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- Fully multi-currency
- Draft / pro-forma debit and credit notes
- Automated Recurring Fees for fixed and responsibility fees
- Draft invoice approval and posting options
- Automated and pre-defined invoice generation options
- Unlimited number of revenue /invoicing entities
- Multiple matters (mandates / projects) per record
- Unlimited number of chargeable / non chargeable services
- Multiple fee levels per service
- Multiple price lists
- Multiple VAT / GST rates including exempt
- Invoice templates in Microsoft Word format, easily customized
- Unlimited debit / credit note templates
- Invoices in client preferred language

### q Time / Disbursement and Productivity Management

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- Variety of time recording units
- Unlimited number of chargeable / non chargeable services
- Stopwatch option for exact time keeping
- Charge time either by user rate or by service / job rate
- Per user targets for time recorded and chargeable time recorded
- Approval before invoicing option
- Record disbursements made on behalf of a client e.g. courier charges, travel costs etc
- Automated disbursement mark-up option
- Transfer time and disbursements
- Adjust / write off multiple time and disbursement entries
- Free text or Pre defined time entry narrative
- Integrated with sales and purchase ledger
- Time entry posting window

### q Work In Progress (“WIP”) Management

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- WIP time billing
- WIP disbursement recovery
- WIP recurring fees billing
- WIP consolidated billing option
- Global WIP bill generation

- Minimum WIP value before invoicing option
- Detailed enquiry and edit features

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## Q **Recurring Fees (Fixed / Responsibility Fees)**

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- Charge an unlimited number of services
- Includes government fee / third party fees
- Multiple renewal periods including per annum, per quarter, per month
- Bill in advance or arrears
- Automated pro-rated billing
- Multiple matters / revenue companies
- Multiple renewal dates
- Individual or batch generated
- Automatic update of next due date
- Automatic assignment and copy features

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## Q **Settlements / Payables**

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- Multiple search and select options
- Multi currency
- Batch settlement of sales and purchase invoices
- Settlement per one or multiple invoice detail line(s)
- Settlements to or from matter accounts
- Drill down on transaction history per record and per invoice

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## Q **Debtor / Creditor Management**

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- On-screen aged analysis screen with various selection criteria
- Multiple standard, Microsoft Word and Excel reports
- Advanced Custom Reporting
- Easy report customisation
- Multiple statement formats
- Segregation of draft invoices debtors from posted invoice debtors
- Record Bad Debt Provision Notes

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## Q **Government / Third Party Fees**

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- Invoicing government fees
- Auto calculation of penalty fees
- Instant penalty fee invoicing
- Strike off date notification
- Management of payment to third party

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## Q **Matters / Mandate / Projects**

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- Multiple matters, mandates and projects per file

- Enables multiple revenue (invoicing) entities
- Fully multi currency
- Retainer / advanced fee / fixed fee tracking
- Non-recoverable chargeable time options
- Settlement to and from matters
- Optional internal file owners per matter, mandate and project

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## q Other Special Features

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- Automated billing configuration review
- File cloning
- Multi fee levels and price lists
- Multiple posting control options
- Straight thru processing to Client Accountant

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## q Universal Features

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- Centralised Master File
- Centralised Address Book
- Multiple Client Addresses
- Multiple contact Details
- User Alerts
- Relationship Management
- Automated To- Do List
- Form / Template Library
- File Notes / Recurring Tasks
- Correspondence Generator / Register
- Safe Custody Register
- Compliance Register
- File Archives Register
- Enquiry
- User Fields