



Practice Manager Features

ViewPoint Software for Business Ltd

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Feature Summary

Multi-Currency Sales and Purchase Ledgers

- 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 rate levels per service
- Multiple price lists
- Multiple VAT/GST rates including exempt
- Invoice templates in Microsoft Word format, easily customised
- Unlimited debit/credit note templates
- Invoices in client's preferred language

Time/Disbursement and Productivity Management

- 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

Work In Progress (“WIP”) Management

- 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

Recurring Fees (Fixed/Responsibility Fees)

- 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

Settlements/Payables

- 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

Debtor/Creditor Management

- 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

Government/Third Party Fees

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

Matters/Mandate/Projects

- 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

Other Special Features

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

Universal Features

- 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