



ViewPoint Software for Business Ltd

Practice Manager Features

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<u>Practice Manager Features</u>	
Feature	Feature Summary
Multi Currency Sales and Purchase Ledger	<ul style="list-style-type: none"> • 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 customised • Unlimited debit / credit note templates • Invoices in client preferred language
Time / Disbursement and Productivity Management	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Invoicing government fees • Auto calculation of penalty fees • Instant penalty fee invoicing • Strike off date notification • Management of payment to third party
Matters/ Mandate / Projects	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Automated billing configuration review • File cloning • Multi fee levels and price lists • Multiple posting control options • Straight thru 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 and template library
- File notes and recurring tasks
- Correspondence generator and register
- Safe custody register
- Compliance register
- File archives register
- Enquiry
- User fields

