



Paperless Proforma & Invoice Module

- Timely and accurate billing, leading to significantly improved cashflow
- Consistent and compliant distribution of proforma management
- Enhanced understanding & visibility of billing pipeline and revenue at risk
- Increased collaboration between attorneys and finance
- Real-time visibility of proforma and invoice progress with intuitive dashboards
- Improved efficiency and reduced cost associated to billing
- Ability to measure workload and performance metrics to identify potential bottlenecks
- Approval rules & routing for financial write-downs and discounts
- Mobile-friendly interface allowing attorney edits of proforma fees and costs
- Dynamic end-to-end workflow from WIP to proforma creation to invoice delivery
- Powerful edit capabilities, including search, summary, and quick actions
- Automated email notifications
- Automated and validated updates to Elite 3E
- Support for paper-based proforma distribution and collection

Proforma Management

MI MIRA
My Dashboard
Search...

PROFORMA CREATE
WIP \$1,693,738

PROFORMA REVIEW
MATTERS 17

AWAITING RELEASE
MATTERS 4

WRITE DOWN REVIEW
MATTERS 2

FINANCE PROCESSING
MATTERS 0

SPECIAL RELEASE
MATTERS 0

Proforma Bill Create

Drag a column header here to group by that column

🔄 📄 📄 📄 🔍 Search...

<input type="checkbox"/>	Client Name	Matter Name	Office Location	Bill Att.	Matr Man.	Bill Type	Wip Bal	Disb Bal	Total	Bill To	UT	Age	FMS	
	🔍	🔍	🔍	🔍	🔍	🔍	🔍	🔍			🔍	🔍	🔍	
<input type="checkbox"/>	▶ Agivu	sapient arcu sed augue	Kentucky	BXB1	LXA1	Terms	\$10,746	\$313	\$11,059	3/9/2021	📄	N	🟢🟡🔴	N
<input type="checkbox"/>	▶ Aimbo	proin risus praesent	Pennsylvania	RXB1	HXM1	Terms	\$6,855	\$3,950	\$10,805	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Babbleset	auctor sed tristique in tempus	Georgia	AXC1	CXF1	Cycle	\$6,014	\$3,934	\$9,948	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Babblestorm	bibendum morbi non quam	Kansas	NXC1	GXH1	Cycle	\$11,600	\$4,668	\$16,268	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Browsebug	ligula pellentesque ultrices	California	CXG1	IXA1	Terms	\$23,062	\$2,919	\$25,982	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Browsedrive	fusce congue diam id ornare	Kentucky	RXB1	RXG1	Cycle	\$4,537	\$837	\$5,373	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Bubblebox	ac neque duis bibendum morbi	New Jersey	SXP1	SXG1	Cycle	\$13,786	\$4,444	\$18,230	3/9/2021	📄	N	🟢🟡🔴	N
<input type="checkbox"/>	▶ Bubblemix	eu massa donec dapibus	Iowa	CXG1	MXB1	Terms	\$3,593	\$2,422	\$6,016	3/9/2021	📄	N	🟢🟡🔴	N
<input type="checkbox"/>	▶ Bubbletube	convallis duis consequat	California	MXR1	GXG1	Cycle	\$23,235	\$1,528	\$24,762	3/9/2021	📄	N	🟢🟡🔴	Y
<input type="checkbox"/>	▶ Bubbletube	curae mauris viverra diam vitae	West Virginia	GXT1	SXD1	Terms	\$24,093	\$275	\$24,368	3/9/2021	📄	N	🟢🟡🔴	Y
							\$1,404,064	\$289,674	\$1,693,738					

Billing Dashboard

nth



BILLING DASHBOARD

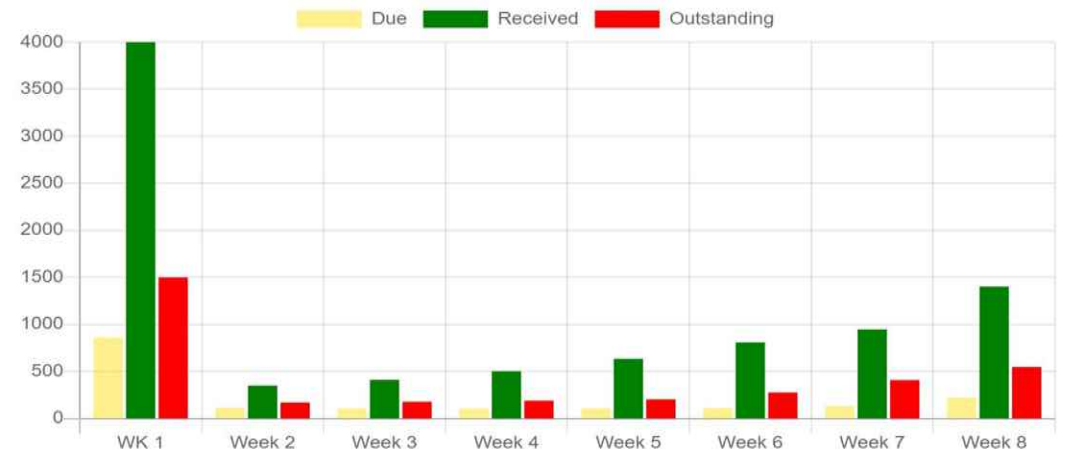
BILLABLE WIP Matters	\$250,000 ↗ 370
AT PREBILL STAGE Matters	\$25,000 ↗ 57
READY FOR RELEASE Upload Email	\$230,000 ↗ 57 127

COLLECTIONS Matters	\$1,832,987 ↗ 450
DUE Matters	\$ 500,000 ↗ 170
RECEIVED Matters	\$ 350,000 ↗ 120
OUTSTANDING Matters	\$ 150,000 ↗ 83

BILLING SUMMARY



COLLECTIONS SUMMARY



Attorney Dashboard

ATTORNEY DASHBOARD

PREBILLS READY

Releaseable

\$25,000

5

APPROVAL PENDING

Write Downs Pending

\$25,000

5

BILLS OUTSTANDING

30-60D 2

60-90D 2

\$125,000

90-120D 2

WIP BALANCE

Billable Matters

\$25,000

7

REVENUE (LAST 30D)

Sup. \$50,000

Billed \$ 25,000

Coll. \$ 20,000

UTILIZATION (WEEK)

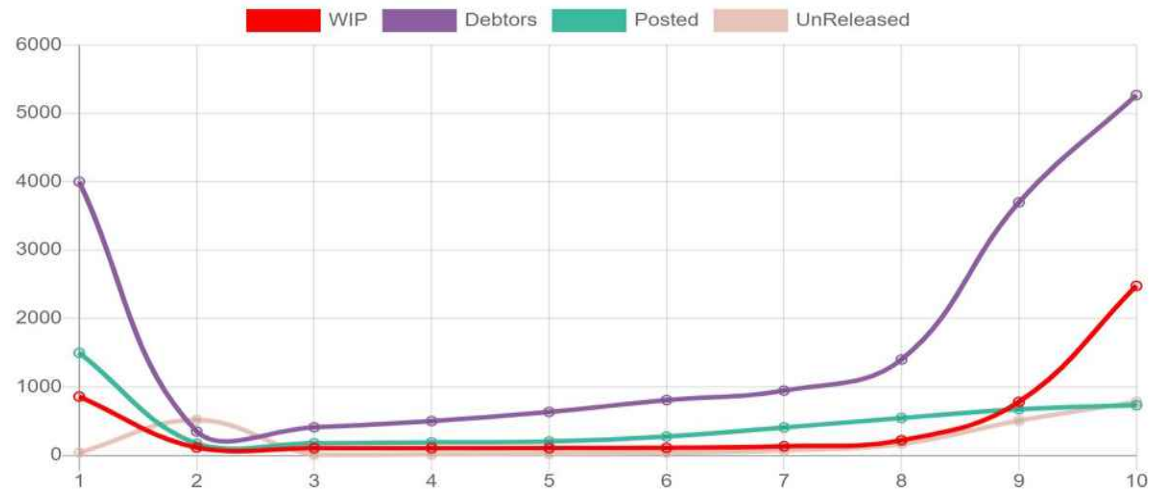
Base 25h

Billed 20h

Billable \$ 25,000

MY PERFORMANCE

↑ 5% increase.



🕒 updated 4 minutes ago

MY REALIZATION

↑ 5% increase.



🕒 updated 4 minutes ago

Executive Dashboard

EXECUTIVE DASHBOARD

UTILIZATION 250h 75%

REVENUE New Matters (WTD) \$250,000 57

DEBTORS 30-60D 60-90D 90-120D 2 2

DUE UNPAID Invoices \$ 120,000 75

DUE NEXT 7 DAYS Invoices \$ 150,000 95

AT RISK Invoices \$ 15,000 15

CURRENT WIP (UNRELEASED TIME) Matters \$ 120,000 75

BILLABLE WIP Matters \$ 150,000 95

AT PREBILL STAGE Matters \$ 15,000 15

READY FOR RELEASE Upload Email \$230,000 57 127

