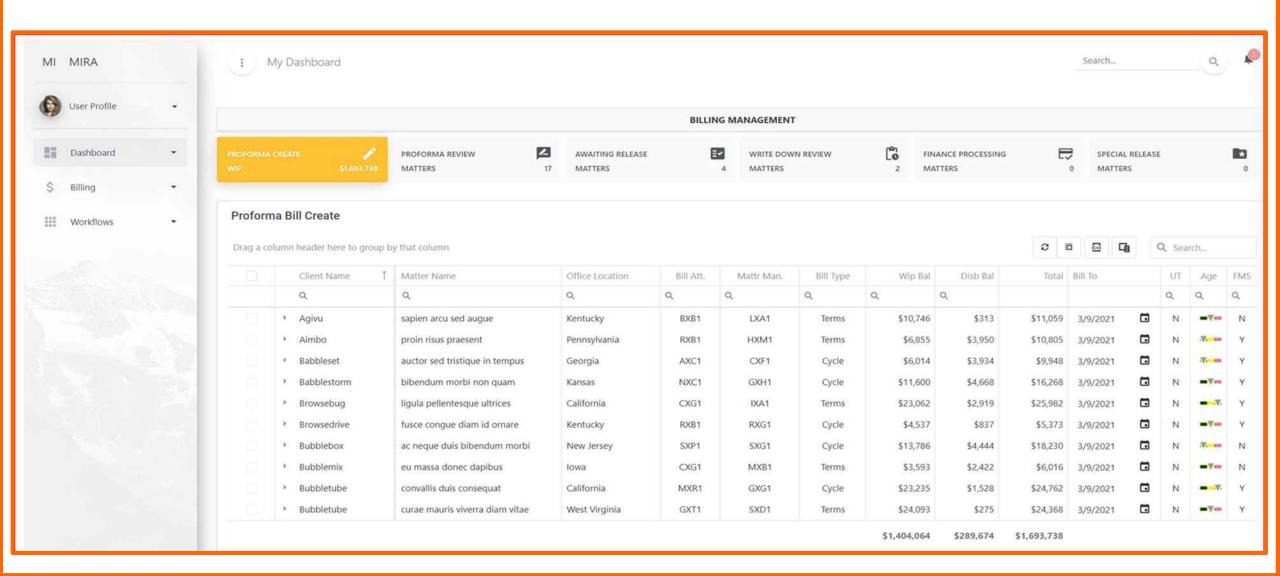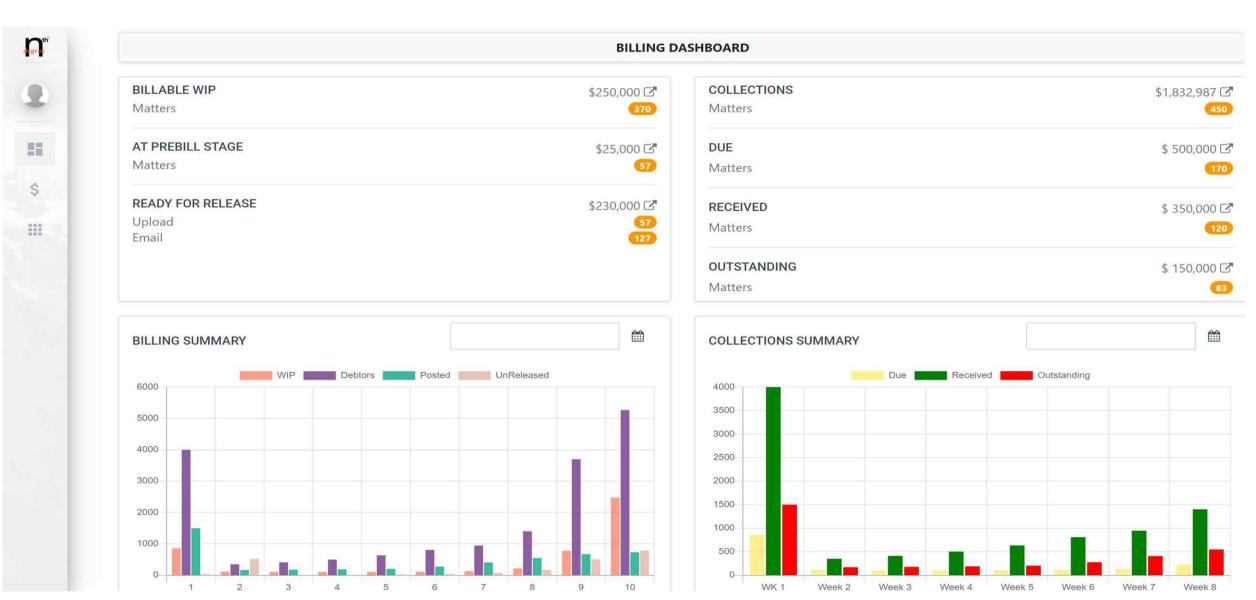# Paperless Proforma & Invoice Module

- 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
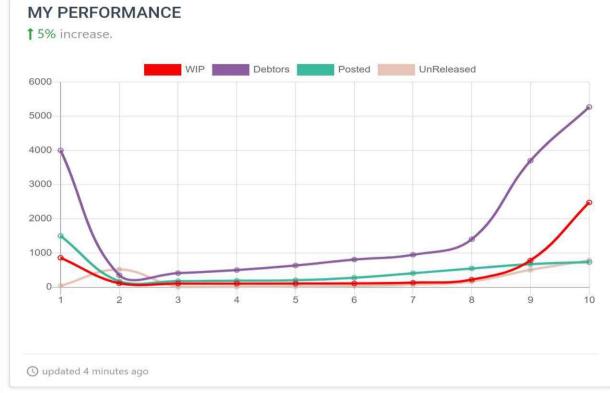
Proforma Management

Billing Dashboard

Attorney Dashboard

PREBILLS READY — $25,000
Releaseable — 5

APPROVAL PENDING — $25,000
Write Downs Pending — 5

BILLS OUTSTANDING — $125,000
30-60D 2   60-90D 2   90-120D 2

WIP BALANCE — $25,000
Billable Matters — 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.

Legend: WIP — Debtors — Posted — UnReleased

(Y-axis: 0, 1000, 2000, 3000, 4000, 5000, 6000)
(X-axis: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10)

🕐 updated 4 minutes ago

MY REALIZATION
↑ 5% increase.

Base Hours

Billed
40%

Collected
28.6%

🕐 updated 4 minutes ago

Executive Dashboard

UTILIZATION 🡥
250h `75%`

DUE UNPAID $ 120,000 🡥
Invoices `75`

REVENUE $250,000 🡥
New Matters (WTD) `57`

DUE NEXT 7 DAYS $ 150,000 🡥
Invoices `95`

DEBTORS $125,000 🡥
30-60D `2`   60-90D `2`   90-120D `2`

AT RISK $ 15,000 🡥
Invoices `15`

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

BILLING SUMMARY 🗓

BILLABLE WIP $ 150,000 🡥
Matters `95`

AT PREBILL STAGE $ 15,000 🡥
Matters `15`

READY FOR RELEASE $230,000 🡥
Upload `57`
Email `127`

Billing Summary bar chart — WIP, Debtors, Posted, UnReleased across periods 1–10.