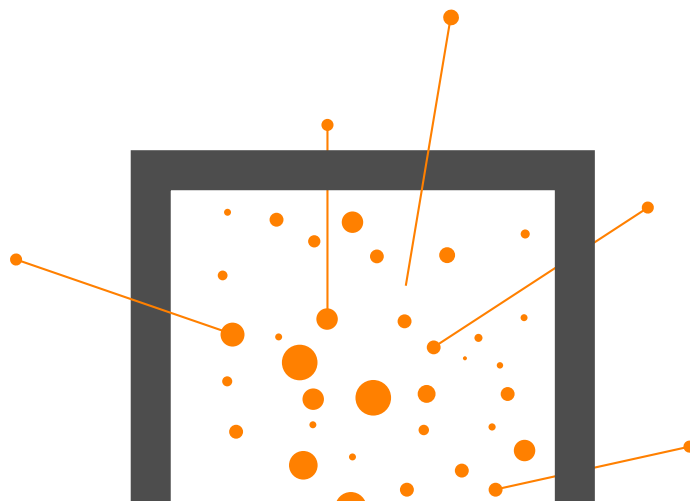


Practice and Matter Management

Firm Central

2017 Enhancements



The intelligence, technology and human expertise
you need to find trusted answers.



the answer company™
THOMSON REUTERS®

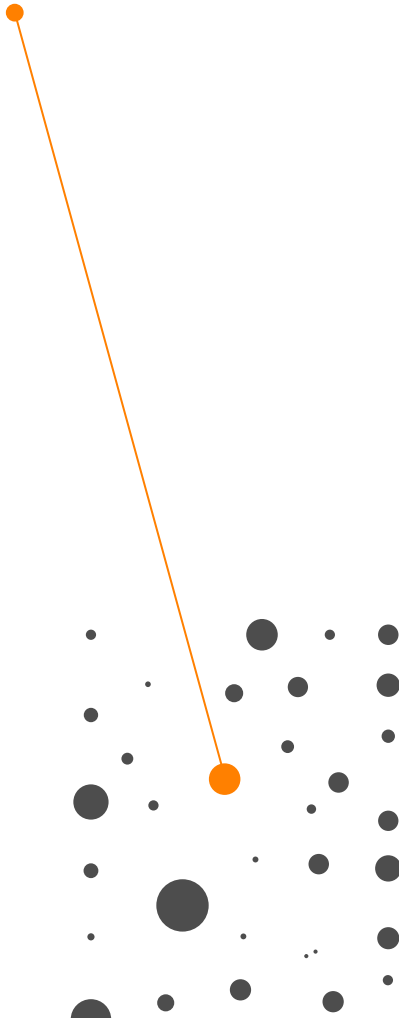


Overview

Designed for high street law firms and sole practitioners, Firm Central is the mobile-enabled and cloud-based matter management and billing solution that connects your documents, contacts, calendar, time and billing, legal research and more to provide a complete and current view of your entire firm.

We would like to provide an insight into the work that we, at Thomson Reuters, have been doing to ensure that Firm Central remains invaluable to the work that you do.

In consultation with our customers, we have introduced new functionality, developed existing features and streamlined the navigation. We have also delivered countless bespoke training sessions and a wealth of support materials for users.





Behind the scenes

✓ Tailoring training and support

To help users make the most of our solutions, we delivered comprehensive and tailored training sessions to suit each organisation's needs. We also provided first class support to customers via phone, email and face-to-face throughout the year.

✓ Enabling further integration

We continued to integrate Firm Central with other Thomson Reuters solutions such as Contract Express and Practical Law, to help users obtain greater value from their subscriptions and our legal solutions.

✓ Keeping users informed

With plenty of enhancements to Firm Central in 2017, we have worked to ensure that users remain informed of developments and experience the full benefit that these changes bring. To help achieve this, we invited customers to attend our inaugural product conference, Generate 2017, and re-launched our product development blog, Broadcast.

✓ Acting on feedback

In 2017, we continued to work closely with customers to understand their evolving needs. Through focus groups, customer events and surveys, we gained invaluable feedback from users which helped to shape our product development roadmap and supporting resources.

✓ Streamlining operations

We streamlined our internal operations and adopted a more global approach to product development, with the aim of improving efficiency, fast-tracking innovation and aligning our solutions for customers.

Find out the latest news

Read Thomson Reuters Legal product development blog, Broadcast, to stay informed of upcoming changes to our legal solutions, new enhancements due to launch and key content additions.

To receive the next Broadcast newsletter, please sign up at legal-solutions.co.uk/newsletter

Did you know?

Customer training

In 2017, we held a wealth of online and face-to-face training sessions for users across our legal solutions. Here are a few of the highlights:

WE TRAINED OVER

14,750

END USERS*

*(excluding students) a 30% increase on 2016

WE DELIVERED OVER

14,050

TRAINING HOURS IN 2017

WE CREATED OVER

85 350

GENERAL AND
SPECIALIST TRAINING
MATERIALS FOR USERS

OVER

40%

OF SESSIONS COVERED
MORE THAN ONE
LEGAL SOLUTION

98%

OF USERS TRAINED SAID
THEY WOULD RECOMMEND
TO A COLLEAGUE AND

97%

SAID THEY LEARNED
SOMETHING NEW

98%

OF USERS TRAINED SAID THEY
FOUND THE ONLINE SOLUTION
MORE VALUABLE IN THEIR
DAY-TODAY ROLES

To book a training session for users in your organisation, please email trainingrequest@thomsonreuters.com or contact your dedicated Account Manager.

*Figures included from January 2017 – November 2017.

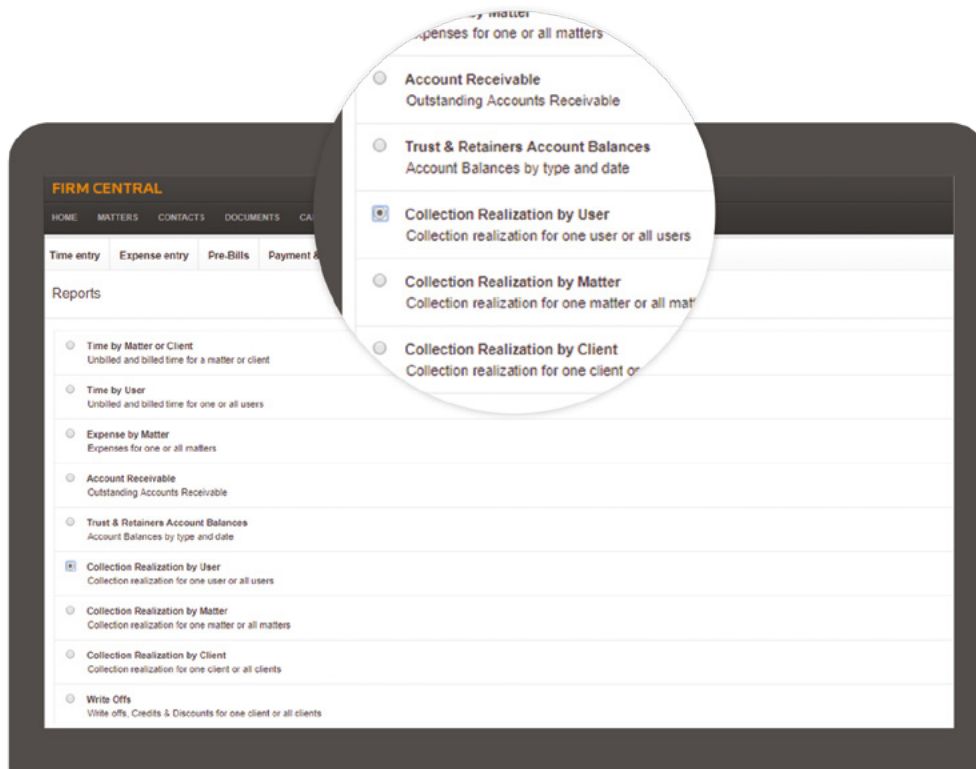
Highlights

The enhancements have been categorised under three key themes; analytics, enhanced user experience, and innovation and integration.

Analytics

Fee-earner productivity report

To monitor individual fee earners' performance and productivity, administrators have the ability to generate a 'Collection Realisation by User' report which provides detailed information on billed, collected or written-off fees within a specified time frame.

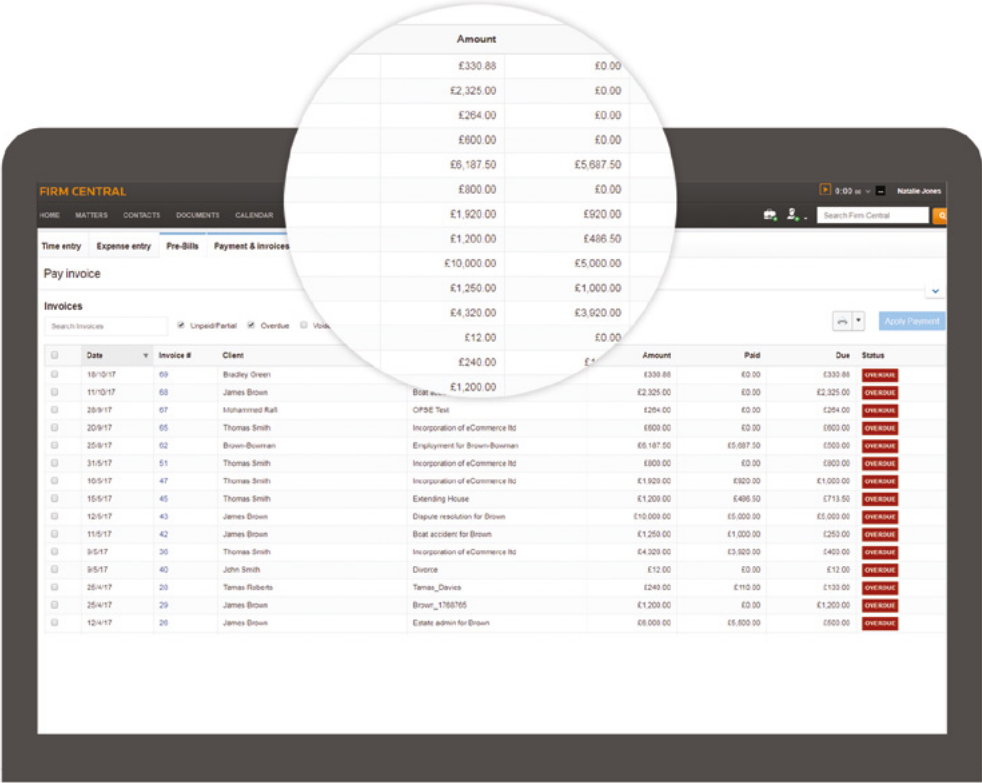


Innovation and integration

Time and billing management

From the time and billing tab in Firm Central, users can easily and accurately record time and expenses, manage pre-billing, promptly issue invoices, track payments, manage client Trust Accounts and report on various aspects of billing activity.

- **Track your time** – Enter your time into the timesheet for a matter or use the timer to record the time spent on a task.
- **Enter and record expenses** – Easily input expenses for matters or clients, use appropriate coding and allocate the relevant VAT rate.
- **Manage pre-billing** – Manage and edit your bills and check everything is in order before invoicing a client.
- **Create and issue invoices** – Create invoices and share with clients effortlessly via the secure client portal.
- **Track payments** – Browse, track and pay invoices to keep on top of your finances.
- **Manage client money accounts** – Create, record and monitor activity on your clients' money accounts effortlessly.



		Amount	
		£330.88	£0.00
		£2,325.00	£0.00
		£264.00	£0.00
		£600.00	£0.00
		£5,187.50	£5,687.50
		£800.00	£0.00
		£1,920.00	£920.00
		£1,200.00	£486.50
		£10,000.00	£5,000.00
		£1,250.00	£1,000.00
		£4,320.00	£3,920.00
		£12.00	£0.00
		£240.00	£0.00
		£1,200.00	£0.00

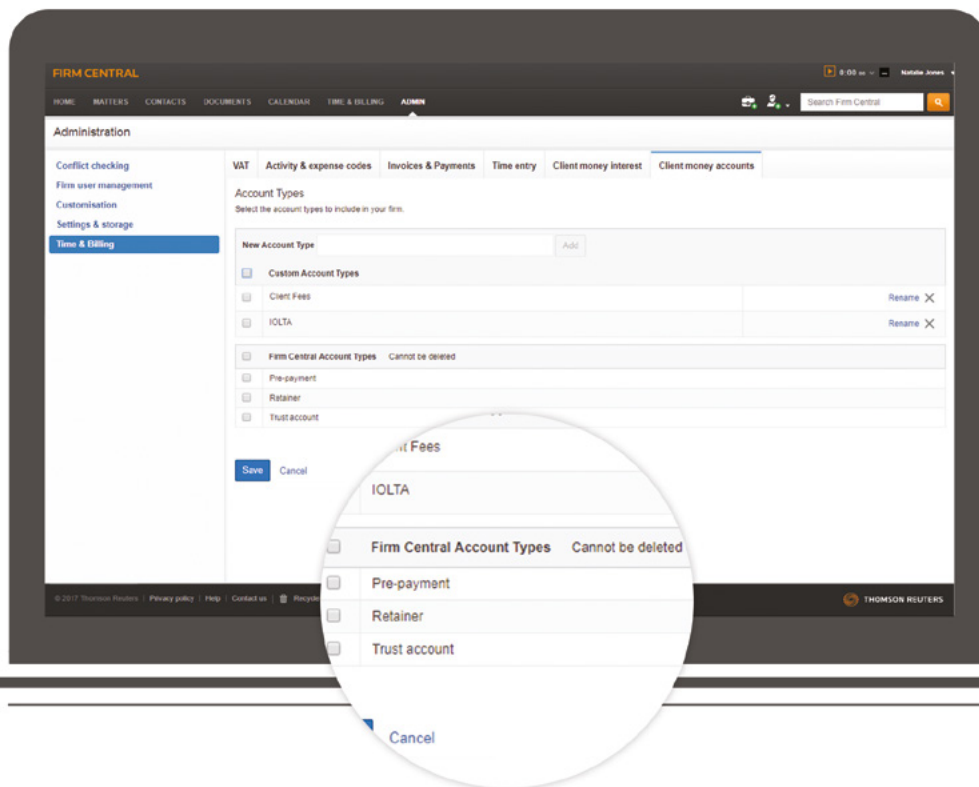
	Date	Invoice #	Client	Amount	Paid	Due	Status
	18/10/17	59	Bradley Green	£330.88	£0.00	£330.88	OVERDUE
	11/10/17	68	James Brown	£2,325.00	£0.00	£2,325.00	OVERDUE
	28/9/17	67	Mohammed Rafi	£264.00	£0.00	£264.00	OVERDUE
	20/9/17	65	Thomas Smith	£600.00	£0.00	£600.00	OVERDUE
	25/9/17	62	Brown-Bowman	£5,187.50	£5,687.50	£0.00	OVERDUE
	31/5/17	51	Thomas Smith	£800.00	£0.00	£800.00	OVERDUE
	10/5/17	47	Thomas Smith	£1,920.00	£920.00	£1,000.00	OVERDUE
	15/5/17	45	Thomas Smith	£1,200.00	£486.50	£713.50	OVERDUE
	12/5/17	43	James Brown	£10,000.00	£5,000.00	£5,000.00	OVERDUE
	11/5/17	42	James Brown	£1,250.00	£1,000.00	£250.00	OVERDUE
	9/5/17	36	Thomas Smith	£4,320.00	£3,920.00	£400.00	OVERDUE
	9/5/17	40	John Smith	£12.00	£0.00	£12.00	OVERDUE
	25/4/17	28	Tamasz Roberts	£240.00	£110.00	£130.00	OVERDUE
	25/4/17	29	Brown_1785765	£1,200.00	£0.00	£1,200.00	OVERDUE
	12/4/17	26	James Brown	£6,000.00	£5,600.00	£400.00	OVERDUE

Enhanced user experience

Time and billing management enhancements

In line with customer feedback, we have continually improved existing and developed new time and billing features, which give users the ability to:

- Make changes to existing pre-bills for increased flexibility – Users can add new time or expense entries to an existing pre-bill, change the user or date on time or expense entries.
- Add date filters to client money account statements – Easily print or download client money accounts statements filtered by a specific date range, which limits the balance to only the transactions in the selected time bracket.
- Create and manage multiple client money accounts – In preparation the accounting capabilities due for release in 2018, we have given users the ability to create new account types. This allows users to select from the pre-defined Firm Central account types or create their own types in the admin view.



User permission default setting

Administrators have the ability to set the default access permissions for all Firm Central users. If a user is not allocated a permission level, the default setting for new users is Denied Access. This feature gives administrators greater protection of their firm's data. In addition, default fee rates can be set for users – with the ability to overwrite them as necessary on a matter-by-matter basis.

Invoice display

We have delivered significant improvements to invoice template layout and functionality. Administrators can include bank details and SRA number as well as details of payment transactions and timekeeper summary. In addition, users can opt to include previous balance and payment received sums in the summary, making it quicker and easier for clients to review and process the invoices your firm generates.

FIRM CENTRAL 8:24 AM Mr. Attorney

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING DASHBOARD ADMIN

Search Firm Central

Administration

- Conflict Check
- Firm User Management
- Customization
- Settings & Storage
- Thomson Reuters Product Integrations
- Deadline Assistant
- Time & Billing**
- Product Integrations
- Accounting

VAT	Activity & Expense Codes	Payment & Invoices	Time Entry	eBilling
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Customize Invoice

Invoice Number
1000 (change)

Set Payment Terms
Due 30 days after invoice date.

Payment terms of 0 days will display on invoice as "Due upon receipt."
Payment terms of a specific number of days will calculate the due date based on the invoice date.

Firm Invoice Settings

[Edit Settings](#)

Firm Name: PM&E Law Firm
Firm Address: 49 Featherstone Street, London EC1Y 8DY
Office: (020) 7777 7777
Fax: (020) 7777 7778
Mobile: (020) 7777 7779
Website: www.pmebiz.co.uk
Firm Logo: [Image]

Trust Replenishment Message: Please note: Funds have been below the agreed upon amount. For more information, please refer to your retainer agreement or contact your attorney.
Footer Text: CPA, 7777. Please contact your attorney if you have any questions about this bill.

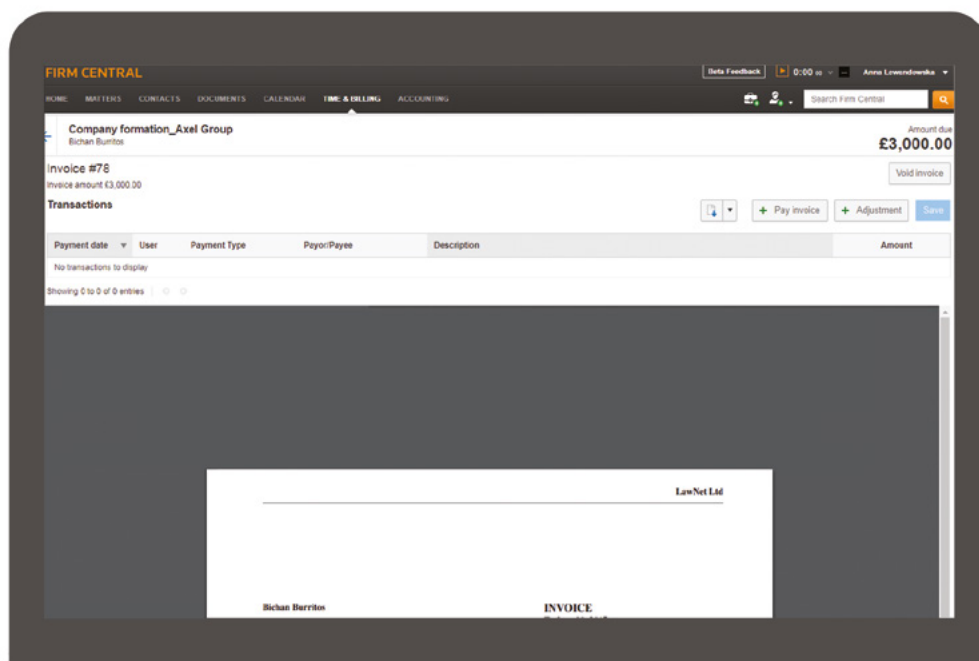
Remittance Slip Information

Bank: Lloyds Bank PLC

Notes:
Adding remittance slip information section. This information will be included when the remittance slip is included on the invoice template.
The CPA number may be added to the disclaimer footer text at the firm's discretion and in the format they choose. There will be no form field at the time to capture it for use elsewhere.
A previous version of this form had the VAT included on this page. As there is a VAT page, the UK recommendation is that the VAT number NOT be moved from its current location on the VAT page.
The edit version of this screen should follow the current standards for editing.

Invoice reversal

You may find from time to time that you have generated an invoice for a client pre-maturely and need to make amendments. In this scenario, you can change an invoice back into a pre-bill, once all previous transactions have been reversed. This makes invoice management more efficient and provides greater transparency for accounting purposes.





What's new?



Q1

Introducing time and billing management

The ability to record your time and expenses, manage pre-billing and invoices, track payments, manage client Trust Accounts and report on billing.



Q2

Time and billing enhancements

These include week-view time entries, non-billable expense entries, trust account date filter and more.

Functionality enhancements

These include the ability to transfer a matter to another client, save the same email address for several contacts, 'CC' and 'BCC' fields in the client portal, and setting default permission levels for new users.



Q4

Reporting enhancements

Monitor individual fee-earners' performance and productivity by generating a 'Collection Realisation by User' report.

Multiple types of client money accounts

Users can select from the pre-defined account types or create their own types in the admin view.



Q3

Time & billing enhancements

These allow users to make key changes to pre-bills e.g. add / remove entries, change the user or date on time or expense entries for a matter or client.

User interface improvements

The main task list has been extended and made more prominent.

Collection realisation reports update

The ability to include invoices paid in a date range in reports by client and by matter.

Invoice enhancements

The layout has been improved for pre-bills and invoices, and users have more flexibility in the information featured in the summary boxes on these documents.

What's next?

Reporting and dashboard enhancements

Designed to give admins and users easier access to reports and the key metrics for their matters to enable more effective practice management.

Core feature enhancements

Improving the field customisation within matters and allowing template matters to be created/used when opening new matters.

Drafting capabilities enhancements

Users will have the ability to share contacts between Firm Central and Contract Express for improved contact management, insert an auto-signature for client communication and choose from an extended number of templates for legal correspondence.

Improved data migration support

Enhance the tools to import contacts, matter & financial information.

New CRM capabilities

Support lead and campaign management for new business development.

Time and billing enhancements

Based on customer feedback to ensure evolving needs are met.

Improved user interface

The display will be streamlined and more intuitive, making key features more accessible and important information more prominent.

Accounting management capabilities – Building on Firm Central's time and management capabilities, admins will be able to manage financial accounts, calculate and track VAT, process invoices and payments, and produce financial statements like profit and loss so you can stay on top of business.

Further integrations:

- **Practical Law** – further integration to enable access to Matter Maps and content recommendations in Firm Central
- **Westlaw UK** – further integration to enable users to search for Westlaw UK content within Firm Central
- **Contract Express** – the ability to draft client engagement documents and notes, incorporating contact details in Firm Central

New accounting provider integrations

With third parties such as Quick Books and Xero.

Event-driven pre-bills

Configure matters to enable the automatic generation of a pre-bill when a milestone is triggered, such as when a date or expense value is reached.

2018



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