

Wilson Proforma Tracker Software

Collaborate on proformas using an integrated and intuitive workflow

Improve Invoice Accuracy and Speed Turnaround Time

Proforma management – it's an essential function at any legal or professional service organization that can be one of the most challenging. Without a controlled workflow to manage this process, collecting input from timekeepers on a timely basis can be difficult, leading to delays in billing and inaccurate invoices that are rejected by clients. From a technology perspective, dealing with complex invoices and getting data in or out of the backend financial system can be tricky as well.

Now there is a simple way to address all these challenges and more. With the Wilson Proforma Tracker, organizations can manage the entire process with greater ease and gain valuable insight into anticipated billing while enhancing performance.

Enhance collaboration with a workflow-based process

Wilson Proforma Tracker simplifies the preparation and validation of proformas. It integrates with Elite Enterprise and 3E and provides instant access to timekeeper data from an intuitive mobile-friendly user interface. Administrators and timekeepers can edit proformas either electronically or on paper, improving front-office participation.

A firm-specific dynamic workflow gathers input and makes it easier to collaborate on time and expense details. The software maintains an audit trail of edits, so you can validate billing information or return to a previous version of the information with ease. The validated data is then updated in the backend system to

ensure consistent records and to prevent duplicate effort.

Additionally, having a workflow-based billing process helps to enforce compliance with any financial rules the firm has implemented, such as an approval procedure for write-downs above a certain threshold.

Firms can manage the finance department's workload more efficiently, whether the distribution of proformas takes place in individual offices or from a centralized billing department. Senior-level billers can focus on complex invoices, while junior-level billers can deal with the high-volume, but low-change invoices.

Increase Visibility Into Billing Processes

Improving the proforma process leads to timelier billing and collections. But to do so, you need insight into the process to determine opportunities for improvement. With Wilson Proforma Tracker, firms can capture the timing and the efficiency of the entire process – from the creation of the draft invoice to its final distribution, while gaining insights such as:

- ➔ How long the proforma process takes from the prebill to the bill state and distribution
- ➔ Where the bottlenecks are
- ➔ Who is delaying the process
- ➔ What types of bills are getting delayed and from which practice areas
- ➔ What volume and what value you will bill each month

Certified consulting services and proven methodology

Integration with Elite Enterprise or 3E enables access to real-time data, which fuels the Wilson Proforma Tracker workflow. Our certified Elite consultants help ensure a fast time to value with a proven implementation methodology that takes your firm from installation to pilot in as little as 90 days:

INSTALL: First 30 days

- Standard screens and functionality
- Configuration of financial system
- Demonstration of functionality
- Identification of customizations

BUILD: Next 30 days

- User testing
- Customization development
- End-user training preparation
- Bug fix and code freeze

PILOT: Final 30 days

- Sign-off
- End-user training
- Partial rollout
- Firm-wide planning

With Wilson Proforma Tracker, firms can prepare proformas with greater speed and accuracy, leading to timelier billing and collections. The software clearly defines user roles, events, and workflow stages to increase front-office participation in the proforma process. Firms can more easily manage a distributed or centralized process to lower costs and better monitor billing timing, efficiency, and compliance with write-down rules.

Wilson Proforma Tracker Workflow

➔ Prepare the proforma in Elite 3E or Enterprise

Actions	Timekeeper	Title	Timecards	Rate	Work Hours/Amount	Bill Hours/Amount
<input type="checkbox"/>	Foster Jean	New Qualified Fee Earner	3	\$700.00	18.00 / \$12,600.00	13.00 / \$9,100.00
<input type="checkbox"/>	La Toya Todd	Fee Earner Support	1	\$300.00	4.00 / \$1,200.00	4.00 / \$0.00
<input type="checkbox"/>	Dunlap Kathryn	Partner	3	\$500.00	15.00 / \$7,500.00	15.00 / \$7,500.00
<input type="checkbox"/>	Jani Michelle	Partner	4	\$500.00	20.00 / \$10,000.00	20.00 / \$10,000.00

➔ Route the proforma for electronic or paper-based collaboration for singular and group bills until approved

Actions	Proforma	Matter	Client	Fees Costs	Total	Actions	Stage	Proforma Reviewer
<input type="checkbox"/>	290	10024-001	NFS Concession Sub	Tray Akman	\$117,200.00 / \$5,000.00	<input type="checkbox"/>	Proforma Review	Foster Jean

➔ Finalize the proforma and submit for billing

Technical Specifications

DATABASE

Co-opt FMS
Quad-core Intel / AMD > 2 GHz
16 GB RAM minimum
60 GB additional disk
SQL Server 2012 or greater

WEB SERVER

Quad-core Intel / AMD > 2 GHz
Windows Server 2012 R2 64 bit
IIS 8.5 or higher

WEB BROWSER

IE (9+), Edge, Chrome, Safari, Firefox

MOBILE DEVICE MANAGEMENT

Good Technology
MobileIron

MOBILE DEVICES

iOS, Android, Windows