

## Integrated Billing, Accounting and Practice Management

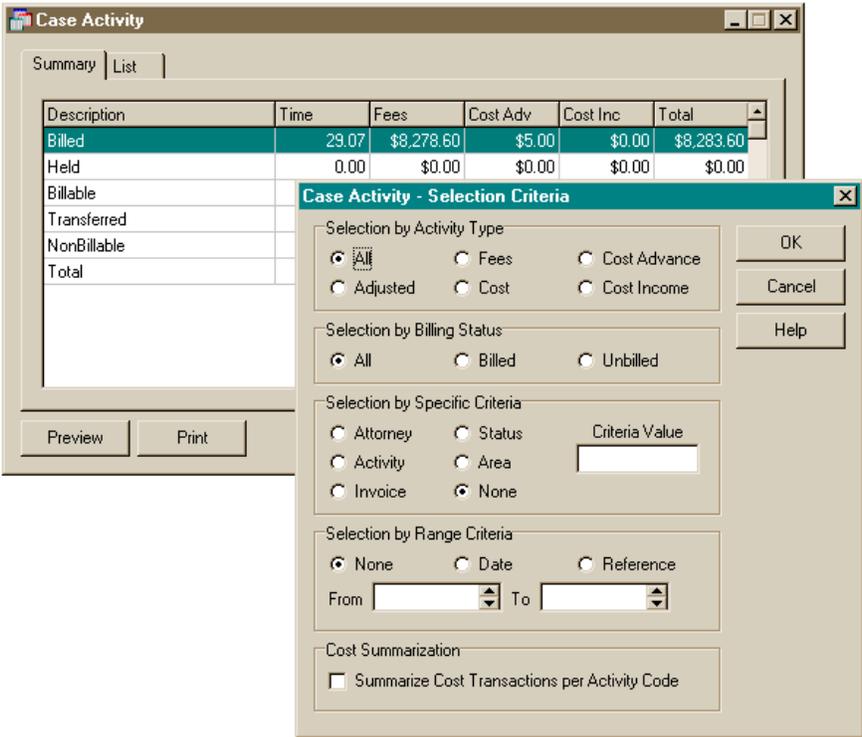
Fast, responsive, comprehensive and intuitive is how Versys clients describe Legal Insight software. Legal Insight has a great track record of improving the ability of law firms to efficiently:

- Capture more attorney time.
- Produce bills to meet client requirements.
- Prepare vendor 1099's.
- Create flexible financial reports.
- Produce meaningful practice management and accounting reports.
- Close accounting cycles efficiently.
- Use SQL and ODBC with Business Intelligence software to analyze the practice.
- Keep track of file folders with bar coding, off-site container management, flexible inquiry, and extensive reporting.
- Meet the ad-hoc reporting demands of partners.

### Drill-Down to Details

Detailed fee and cost transactions can be selected and sorted in hundreds of ways to analyze a matter. Selections include any combination of the choices shown on the “Case Activity - Selection Criteria” window on the right. For example, an inquiry could quickly show prior year transactions for one attorney, that were adjusted before they were billed.

Both the originally entered and the billed time and values are maintained for each transaction. Internal notes can be placed into fee or cost transactions for inquiries and reports.



## Information On-Demand

With the Legal Insight QuickView module, the accounting staff, attorneys, and secretaries have immediate access to desired information about clients and matters. Search logic makes it easy to find clients and matters without knowing their respective codes.

Cleanly formatted reports accompany the on-line views of information and optionally print in two colors.

To optimize performance, statistical summaries in the Legal Insight database are automatically updated with every transaction. This results in a very fast and responsive system.

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**Legal Insight Inquiry**  
**Case Statistics**  
31355 ... Kramer Holdings  
1 ... Real Estate

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*Basic Information*

	Date	Amount		
Last Invoice	03/25/2015	\$507.50	Trust Balance	\$14,900.00
Last Adjustment	03/25/2015	\$365.00	Advance Balance	\$0.00
Last Receipt	03/25/2015	\$5,000.00	Balance Due	\$76,614.75
	<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>
	\$464.00	\$0.00	\$0.00	\$0.00
			<u>Over 120</u>	\$76,150.75

*Accounts Receivable Information*

**MonthToDate Summary**

Type	Fees	Cost Adv	Cost Inc	Late Charges	Total
Balance Forward	\$81,150.75	\$0.00	\$0.00	\$0.00	\$81,150.75
Billed	\$507.50	\$0.00	\$0.00	\$0.00	\$507.50
Cash Receipts	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Adjustments	-\$43.50	\$0.00	\$0.00	\$0.00	-\$43.50
Written Off	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Advance Applied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Ending Balance	\$76,614.75	\$0.00	\$0.00	\$0.00	\$76,614.75

**YearToDate Summary**

Type	Fees	Cost Adv	Cost Inc	Late Charges	Total
	\$76,614.75	\$0.00	\$0.00	\$0.00	\$76,614.75

## Time Tracking



The Timer Toolbox shown here provides a convenient and efficient means for attorneys, paralegals, and other timekeepers to capture their time as they

work. The Timer Toolbox is a part of the AboutTime software developed by Versys for its Legal Insight software, as well as for use with any other billing system. Versys clients are using AboutTime with demonstrable success. The attorneys like its ease of use. More time is captured, which means increased revenue.

AboutTime includes a convenient calendar view and a variety of reports and full-sized entry screens for attorneys. Other entry screens include efficient "after the fact" time and/or cost entry for either attorneys or secretaries. For a quick and easy web demonstration, please contact us at (415) 693-1700, ext. 320. You can also find more information on our web site at [www.versys.com](http://www.versys.com).

## Pre-Bill Editing and Billing

Legal Insight allows the accounting department, secretaries, and attorneys to easily:

- Prepare bills on-demand or on any periodic cycle.
- Move fee and cost transactions to other clients or cases.
- Automatically split fees and costs between various financially responsible parties.
- Prorate fees and costs within hours, rates, and amounts.
- Set transactions back into work-in-process without billing them on the current invoice or mark transactions as being on "hold" to exclude them from being billed until taken off hold.
- Describe a combination of cost transactions to present as a single item on a bill, without losing the underlying details for internal accounting.

## Unlimited Bill Formats

The easiest way to produce a very presentable bill in a client-required format is to use powerful tools for editing. With the Legal Insight Invoice Designer you can format and place text or content where desired.

The Invoice Designer, as shown below on the right, can present as many invoice sections as are needed to address the most demanding requirements of your law firm clients. Standard invoice templates are provided with appropriate sections, such as "Fees", "Fees Recap", "Cost", "Cost Recap", and "Totals". Users can create new invoice templates and invoice sections or modify the templates that are provided, and then save the changes for use with specific clients and cases. Legal Insight invoice templates and complete validation tables are provided for Uniform Task-based Management (UTMS) bills.

Bill formatting parameters work with the templates for even easier control of major sequence and presentation issues, such as sorts by Attorney or by Date, Synopsis or Total Only presentations, etc. This reduces the need to create new templates for each bill formatting nuance. User-definable formats can also include logic to exclude individual summaries and their related text when a summary amount is zero (as in a Tax on Fees summary).

### Jenkins & Jenkins

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March 25, 2015

<b>John Jones</b> <b>Acct Dpt</b> <b>1407 2nd Street</b> <b>New York City, NY 10022</b> <b>Attn: John Davidson</b>	<b>Client</b> 31355 <b>Case</b> 1 <b>Invoice</b> 47103
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*For Professional Services Rendered Through: March 25, 2015*

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>	<u>Amount</u>
03/01/2015	LJP	Telephone conference with client.	0.50	72.50
03/11/2015	LJP	Office conference with client.	1.00	145.00
03/23/2015	LJP	Attendance at closing.	2.00	290.00
			<b>3.50</b>	<b>\$507.50</b>

## Efficient Client/Server Technology

The Legal Insight Client/Server design provides a unique blend of server-based and desktop-based performance optimization. Because the database is fully SQL-compliant, all data in Legal Insight is available to other applications via ODBC. This open architecture, balanced by security, allows easy access to needed data for use in spreadsheets and word processors. The database also supports OLAP business intelligence software and Web access for Intranet or Extranet purposes.

All Legal Insight Client/Server software is built with a fully object-oriented Rapid Application Development environment. A significant amount of system administration time and effort is saved, both initially and on an on-going basis, because Versys provides centrally controlled installation and fully automated "as used" upgrades for all computers on the network. Desktop systems and the Server run on all Windows systems, beginning with Windows 2000.

## One Integrated Solution

Legal Insight includes modules for:

- Time-Capture
- Cost Import
- Time Management
- Billing
- Accounts Payable
- Accounts Receivable
- Trust Management
- General Ledger
- Conflict Checking

**Client Statistics**

Date	Amount	Trust Balance
Last Invoice: 03/25/2015	\$507.50	\$48,400.00
Last Adjustment: 03/25/2015		
Last Receipt: 03/25/2015		

Current: \$464.00

Buttons: Preview, Print

**Case Statistics**

Date	Amount	Trust Balance	Advance Balance	Balance Due
Last Invoice: 03/25/2015	\$507.50	\$14,900.00		
Last Adjustment: 03/25/2015	\$365.00		\$0.00	
Last Receipt: 03/25/2015	\$5,000.00			\$76,614.75

Current	Over 30	Over 60	Over 90	Over 120
\$464.00	\$0.00	\$0.00	\$0.00	\$76,150.75

Buttons: Preview, Print, Close, Help

## Product Experience and Depth of Functionality

The Legal Insight software functionality incorporates all the large and small enhancements that have accrued from more than 20 years of beneficial use by law firms ranging in size from five to over 400 attorneys. The product has been developed and used in a relational database from its inception. The Windows Client/Server implementation is built on the same proven and responsive database architecture.

Here are two examples of the functional depth of the Legal Insight software: 1) Accounts Payable and Trust checks can be printed in one pass onto blank check paper with the required check format with MICR encoding, and 2) file folder labels can include bar codes and/or integrate to the production of color-coded tabs.

## Versys Software, Inc.

Versys Software and its most recent predecessor company Versys Corporation have a long history of providing high quality products, accompanied by full service to clients in the legal community. Before focusing on the legal profession in 1985, the prior company Industry Data Services developed professional billing software for the medical profession, full accounting and project management software for construction companies, and inventory and parts management for the auto dealership business. This varied background provided the basis for the development of the Legal Insight billing, accounting, and practice management software.

The company is headquartered in San Francisco. Between the San Francisco office and support offices in New Jersey, Massachusetts, South Dakota and Arizona, Versys offers 12 hours of availability on all working days. On-site consulting and training is provided for new software installations and may be scheduled for specific projects. Our clients consistently report that our support staff is friendly, capable and responsive.

**VERSYS**  
SOFTWARE INC

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