

# Professional Advantage

## ProVantage 6.5

### ProVantage Software Inc.

(800) 843-2188

www.provantagesoftware.com

Price: \$500 per professional user with a minimum of five professional users  
Windows SQL 7.0/2000; Windows NT 4.0/2000/2003 Server

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ProVantage Suite from ProVantage Software Inc., is a financial management software product designed for law firms of all sizes. Version 6.5, released in June 2003, contains several new features including new drill-down tabs in "Fees," "Costs," "Draft Bills," "Bills" and "Accounts Receivable." Twenty-one new reports have been added to ProVantage's long list of available reports, bringing the total number to more than 170. The Strategic Business Unit provides firms with the capability to group clients according to industry.

To run ProVantage you must have a Windows NT 4.0/2000/2003 server with at least 512MB RAM, a Pentium III processor and 2GB hard drive space, and Windows SQL 7.0/2000. Workstations need 128MB RAM; 50MB of hard drive space and a Pentium-level processor running at 200MHz with Windows 98/ME/2000/NT 4.0/XP.

ProVantage's main screen features a pull-down menu bar at the top of the screen, with the current work area listed ("Conflict," "Client/Matter," "Payables," "General Ledger," and more) along with "Edit," "Workflow," "View," "Action," "List," "Tools" and "Help" options. Below are a series of function modules, and to the left of the screen you will find the program areas, known as subsystems, listed in a vertical grid.

Adding a new client, or client/matter is easy. Click on the "Client/Matter" tab to the left of the screen, and then click on the "New" icon above. Finally, click on the "New Wizard" found in the drop-down menu. The wizard takes you through the entire setup process. Here you can choose entity type: company/organization, individual or uncertain. When completed, choose to be taken directly to the "Client/Matter Account Wizard," where you can set up fee para-

meters and effective dates for various items, including originating, billing, settlement and marketing. A complete records management component tracks all file-related functions, including opening and checking files in and out, transferring files to storage and scheduling files for deletion. For those on the go, fee information can be entered using iFee. Only Microsoft Internet Explorer, a login and password, and Internet access are required.

The Conflict Checker helps you avoid conflicts by performing a multiple word search on clients, contacts and related parties. Results of this search can be printed directly from the screen, or by using the "Conflict Report" option.



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The Executive Portfolio provides a detailed breakdown of specific areas by various criteria, which can be further broken down by firm and by staff. You also can view billing hours, average amount billed per week, and work-in-progress balances and percentages.

Entering fees is quick. ProVantage easily handles time entry for multiple timekeepers, and for one time or special fees, you can use the "Rate Override" function. If you track client-related costs, they are entered by client/matter, and a timekeeper field can be added. Fee codes and American Bar Association codes can be found in the drop-down lists available on the fee-entry screen. There is enough space for unlimited fee descriptions, and you can use the built-in abbreviation codes.

ProVantage makes client management simple, with easy integration with Microsoft Outlook. Clicking on the various tabs gives you a quick analysis of your firm's clients, including current activity, accounts receivable aging, a nice billing and lag-time graph, and

client payment information. As a convenience, clients also can be ranked by performance.

The general ledger provides your firm with a complete accounting/financial system. In the "Payables" module, you can assign invoices to regular general ledger accounts or enter them as client/matter invoices so they appear on the client billing when it's processed. The "Receivables" module-posting area is designed with law firms in mind. The main screens provide quick and easy access to post payments, retainers, client write-offs and credit memos.

ProVantage offers an unlimited number of statement formats. For your convenience, statements, bills, checks and collection letters can be produced in Word. If you prefer, you can create statements as Excel files. There also is an option to create e-bills. Current supported standards for e-billing include Legal Electronic Data Exchange Standard, LegalGuard, Litigation Advisor and Tymetrix formats. There also is an option to create custom electronic billing formats to fit your firm's specific needs.

Along with the standard reports available in ProVantage, the Focal Point Reportwriter is available for producing in-depth, analytical reports that can be directly exported to Excel.

The "Contacts" feature provides contact management and marketing tools for promoting your firm. Using the "Contacts" module, you automatically can address letters, faxes and e-mails from prospect lists, and schedule meetings and presentations.

ProVantage also offers both on-site training and remote training for new users. At a cost of \$500 per user, with a minimum of five users, this program is affordable, sophisticated and scalable enough to fit the needs of law firms of all sizes. **LOC**

## Closing Argument

**Pros:** Comprehensive financial management program with a terrific time and billing function, and excellent reporting capabilities.

**Cons:** Might be too much for small (one- to two-person) firms.

**Verdict:** I recommend it. ProVantage offers law firms the luxury of a complete financial system, with general ledger, accounts payable and accounts receivable, along with client/matter management, and time and billing — all completely integrated. ProVantage also offers comprehensive invoice, statement and bill formatting.