

# Practice & Case Management

# A fully integrated, practice and case management system designed for today's forward-thinking law firms and legal departments.

**ALB combines cutting edge technology and ease of use. It helps drive efficiency throughout the legal practice, providing everything your firm needs to improve productivity and grow in today's competitive market.**

## **Client >**

John McKee Solicitors

## **Sector >**

Legal

## **Project >**

Law firm specialising in Corporate law looked to improve practice efficiencies with ALB and Workflow.

*"This level of simplicity of using the Workflow Toolkit to modify ALB allows us to respond to changes in the market and improve our processes with ease."*

Philip McBride > Partner >  
John McKee Solicitors

Law firms today find themselves in a highly competitive and dynamic market.

This means that legal practices must modernise and improve efficiency to allow them to remain competitive; efficiency and effective customer relationship management are vital to future success.

These needs are met by ALB. It offers a fully integrated practice and case management system, giving the user total control over their working day. It is designed to help your staff efficiently manage their clients, cases and documents, record time, process accounts and monitor performance within an easy to use interface.

### **Tasks and appointments at a glance**

ALB's diary provides a centralised view of your upcoming tasks so you know at a glance what your commitments are for the day.

### **Monitor performance**

Real time performance monitoring of your firm's financial health with the configurable Digital Dashboard giving instant access to the KPIs most important to you. Set custom targets, and ALB will advise you on your progress.

### **Save time and improve accounts accuracy**

Pre-defined postings save time when completing a frequently posted item – you simply enter the client and matter number, choose the predefined posting and post it.

### **Efficient time recording**

Practice efficiency is at the heart of ALB, with the automatic time recording functionality collecting fee earner details and associated charge rates for documents and emails. All chargeable time can be captured, improving productivity and ensuring detailed and accurate time records.

## **Automate Processes**

With ALB, Firms can create business efficiencies and improve compliance through the simple and flexible customisation of business processes. With workflow functionality firms can tailor ALB to suit their own working practices, creating a unique case management system or modify ALB's out of the box case management modules.

## **Manage your client relationships**

ALB allows you to communicate effectively with customers, identify cross-selling opportunities and recruit new customers with easy to build campaigns monitored through evaluation tools.

## **Work on the move**

Our Fee Earner Desktop module allows remote access from anywhere with a web connection, including tablets and smartphones, with available features including time recording, adding to and reviewing document histories, accounts enquiries and cheque requisition and authorisation.

## **Solid, scalable and useable**

With appealing, modern Microsoft styling and intuitive navigation, finding your way around is easy, the number of clicks is minimised and time is saved. ALB is written in .NET and utilises a single SQL database providing a stable, scalable platform where data integrity is assured for a more streamlined approach to IT management.

## **Digital dashboard**

Access your cases at the touch of a button, see and post to your timesheet, view KPI and other reports, see accounts ledgers, documents and emails, and view your diary and appointments all through the user-definable digital dashboard.

# ALB - The complete practice solution



*"Its extensive functionality and adaptability means that ALB is perfectly suited to meet our firm's needs both now and in the future."*

James Knight >  
Practice Manager >  
Spire Solicitors LLP

*"ALB gives us everything we need from a PCMS, allowing us to work more effectively with the confidence that we will be supported both now and in the future."*

Lloyd Bowman >  
Practice Manager >  
Eatons Solicitors (500<sup>th</sup> ALB client)

*"As we look to improve client engagement, the automation that is provided by ALB will help us maximise efficiencies and ensure the customer has a first class experience."*

Stuart Maher >  
Director >  
Watson Ramsbottom

## Practice Management

The Practice and Case Management System (PCMS) brings together all the modules into one centralised application, including client and matter information, time recording, document production, diary, email management and the digital dashboard.

## Time recording

The versatile time recording functions within ALB allows both chargeable and non-chargeable time to be recorded, enabling fast and accurate representation of time spent on cases. Producing documents and saving emails automatically records time at the correct charge rate for the matter. Unlimited on-screen timers mean that fee earners can work on multiple cases simultaneously.

## Legal accounting

A single database environment provides comprehensive accounting functions compliant with the Solicitors Account Rules and HMRC. Simplified entry of daily transactions keeps data entry to a minimum, ensuring accuracy and saving time. A comprehensive range of standard reports are also included, along with VAT return, bank reconciliation, purchase ledger and cashflow forecasting functionality. Recent enhancements now enable regional accounting features for the Republic of Ireland and Scotland.

## Workflow

ALB offers a Workflow Toolkit that can provide the tools and structure necessary to deliver automated processes, accelerate working practices and ensure data consistency and compliance. The Workflow Toolkit is a suite of products designed to allow custom workflows and case-apps to be developed easily by a user without the requirement for developer skills.

## Document Management

Managing correspondence in all formats is vital in today's modern practice, and using the integrated document management system allows all documents, emails, faxes and scanned items to be added directly to a client's file at the touch of a button. The full text search facility ensures users can quickly locate documents, and versioning of documents means that the current draft is apparent.

Top Features:

- > Cutting edge technology giving stability, speed and scalability
- > Full text searching and document versioning within the integrated document management system
- > Attach scanned documents directly to a matter at the touch of a button
- > Drag and drop document and email filing
- > Instant Conflict Check ensures that inappropriate appointments are avoided
- > Anti-money laundering checks
- > Fully integrated case management modules improve efficiency and allow completion of tasks by junior members of staff
- > SAR compliant legal accounting functionality, with one click posting reversals
- > Draft billing and cheque request facility puts the Fee Earner in control
- > Identify dormant client funds (SAR Rule 14.4)
- > Reports can be exported to multiple formats for manipulation or to pass to third parties
- > Fully integrated modules for specific practice areas including Conveyancing, Probate, PI, Legal Aid and more

## About Advanced

Advanced has over 30 years' experience providing software to 5,000 law firms, barristers' chambers and coroners' offices in the UK and Ireland.

Advanced helps customers improve their overall partnership and chambers performance, specifically cash-flow and profitability. Its innovative and easy to use solutions help improve efficiency, increase income and make better use of data to enhance client service.

More than 50,000 legal services staff use Advanced's solutions every day, including: integrated chambers and case management (including workflow); electronic forms; customer relationship management (CRM); business intelligence, skills and resource management; document imaging; HR & payroll and mobile solutions.

## More information

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