

Helping you to automate your business processes

Pro-File

Probate Case Management

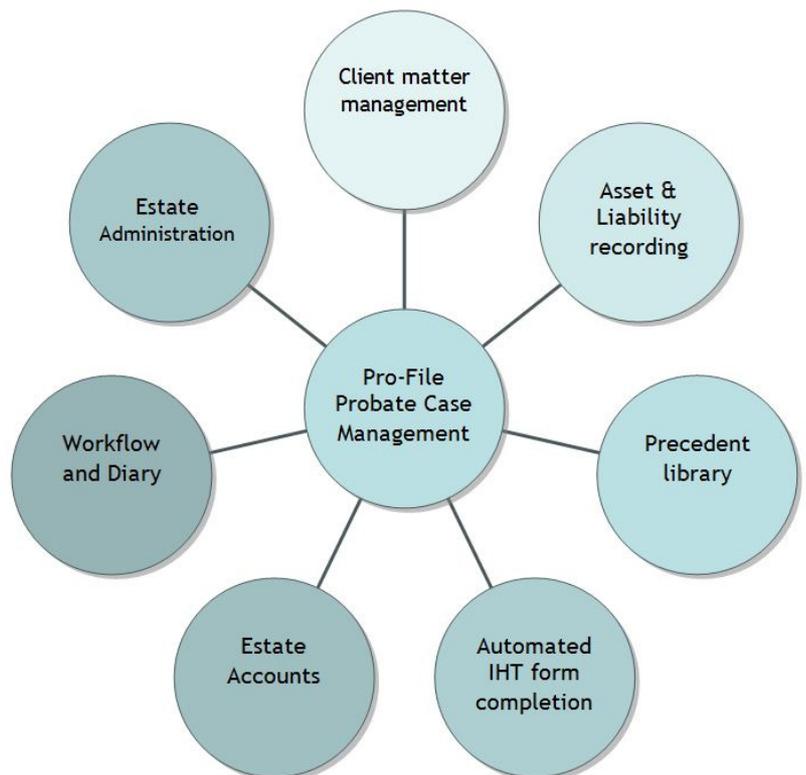
Pro-File, pay-as-you-go Probate matter handling, document assembly and form production.

Pro-File automates the procedural aspects of Probate, bringing consistency to the handling of matters without constraining the way in which the Free Earners need to work. Checks are carried out, and events monitored in the background, with those items needing attention being highlighted at start-up or on request. Costs are attributed to specific matters, and can be charged directly to the client.

- Automatically completes the IHT205 or IHT400 series of forms
- Instant production of Estate Accounts
- Increase efficiency and accuracy
- Extensive amendable precedent library
- Microsoft Office Integration
- Forms package integration
- Party and address re-use
- Diary, Workflow and To Do lists
- Extendable reporting
- Produce clear, concise interim and final accounts at any time
- Standardised format of Estate Account production

Additional features include:

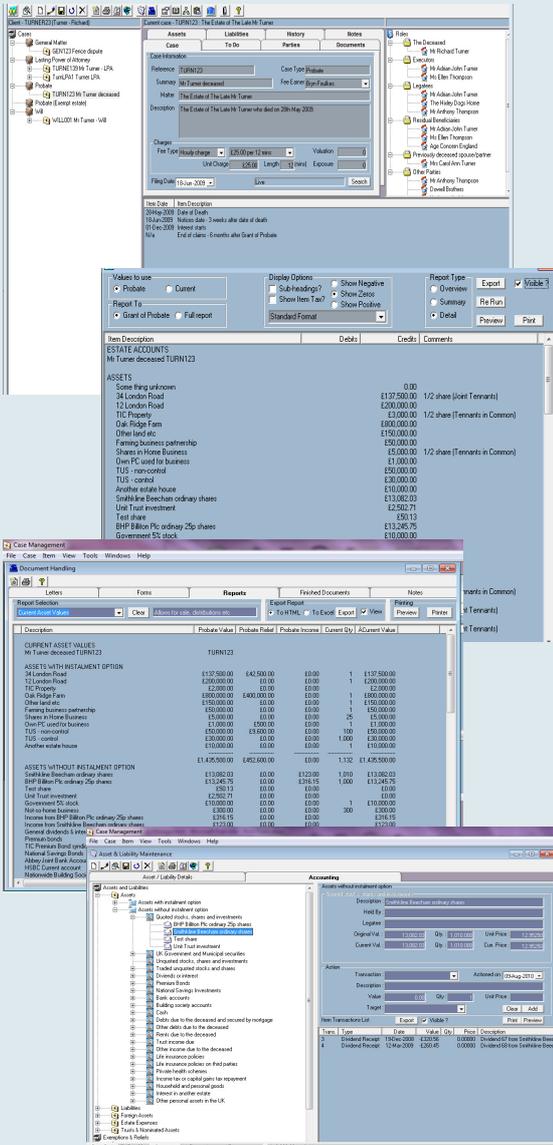
- Built-in time recording
- Disbursement recording
- Communication history
- Checklist production
- Billing reports



Now fully automated with Laserforms, OyezForms and PrintAForm integration

For further details contact: 0843 289 8443, or info@Pro-File.co.uk

SIMPLICITY BY DESIGN



- Estate Accounts
- IHT Form filling
- Precedent library
- Pay-as-you-go

Pro-File is charged on a per-matter basis, offering a low start-up cost and no ongoing maintenance fee or other hidden charges.

The clearly designed Pro-File interface allows the Fee Earner or secretary to become effective immediately. Pro-File Wizards are at hand to guide you through the gathering of the basic details needed to start a matter.

- Enables quick access to any specific matter.
- All parties to the matter are easily viewed, as are assets and liabilities, case notes, letters sent etc.
- Integrated with Laserforms, OyezForms and PrintAForm together with an extensive list of additional oaths and forms etc.
- The extensible design allows the handling of new forms when they are released.
- At any stage in the process, interim Estate Accounts can be produced in various levels of detail, at the click of a button.
- Document production is achieved by selecting the letter required and the party to whom it will be sent.
- Extensive reporting features. All reports can be printed, saved or exported to Microsoft Excel.
- Administration of the estate can be carried out through the accounting screen, which maintains a log of every transaction created against the matter.
- Transaction history available for each asset and liability.
- User-defined Workflows can be assigned to any matter. These are monitored by the program, which generates a list of overdue items at program start-up or on request.

Asset values may initially be estimated, and then updated when the actual values are received. On application of the Grant of Probate, a "snapshot" of the values at that point in time is taken automatically. This ensures that any subsequent changes to assets or liabilities can be easily identified for the submission of a corrective account.