



# 3E Proforma

## DELIVERING GREATER EFFICIENCY, FEE EARNER FLEXIBILITY, AND MODERN CAPABILITIES IN THE PROFORMA REVIEW PROCESS

The importance of having a secure and automated proforma process is undeniable for today's law firms. It reduces wasted resources and time-consuming manual processes, provides review flexibility, and improves cash flow. 3E® Proforma from Thomson Reuters (formerly 3E Paperless Proforma) helps you reduce the chance of human error, speed the proforma process, and get invoices out the door faster. As the next generation of our end-to-end proforma and billing solution, 3E Proforma seamlessly connects the lawyer and the biller experiences by leveraging cloud capabilities, 3E APIs, and 3E workflow technologies. The solution includes the existing paperless features you've come to know, but it has been completely re-architected with an initial centralized billing focus and significant functionality enhancements, with lawyer self-service capabilities coming soon. The result is greater efficiency, transparency, and profitability for your firm.

---

### KEY BENEFITS

- **Improve communication** with real-time interaction between lawyers and billers as part of the proforma workflow
  - **Stay up to date** with visual alerts and change audits for 3E billers when lawyers make edits to their proformas
  - **Streamline and expedite** the review process for improved cash flow
  - **Increase productivity** with filtering, reporting, and scenario calculations features
  - **Monitor the proforma process** with at-a-glance viewing of fee earner productivity and report status
  - **Seamlessly connect** the lawyer and the biller experiences by leveraging the cloud, APIs, and workflow technologies
  - **Work while on the go** with a responsive design for mobile tablets
-

## 3E PROFORMA ENHANCEMENTS

As the next generation of our end-to-end proforma and billing solution, 3E Proforma delivers the same features available in 3E Paperless Proforma but with the following significant architectural and functionality enhancements:

- Real-time interaction between the lawyer and biller as part of the proforma workflow
- Visual alerts and auditing of changes for 3E billers when lawyers make edits to their proformas
- Multi-card and improved group proforma editing
- 3E billing rules and eBillingHub® validation rules integrations
- Responsive design for mobile tablet device support
- Built for centralized billing operations (with distributed operations in the upcoming releases)
- Built on the 3E database and application code allowing for greater workflow efficiency

## ADDITIONAL FEATURES

- Online edit process ensures edits and instructions are both readable and implemented accurately
- Lawyers can run different scenario calculations to achieve the correct balance in compliance with the firm's billing policies
- Lawyers can filter and group proforma work lists by date, status, clients, dollar amount, and much more
- Lawyers are able to defer proformas directly to archives, reducing the steps in the process and reducing accounting's workload
- Administrative staff can easily switch between lawyer profiles without entering and exiting the system
- Real-time updates show how edits to hours or amounts will affect the outcome of the bill
- Tracking tools enable you to track all narrative and status changes made to each proforma
- Interface mirrors traditional paper proformas, making the system easy to learn and use
- Unique productivity features help improve firm performance
- Sophisticated collaboration features allow lawyers to work together at the matter level
- Superior flexibility backed by configurable workflows, enables the solution to work the way your firm works
- Built-in, configurable, and automatic approval routing

The screenshot displays the 3E Proforma dashboard. At the top, it shows the user is logged in as Wesley Noble. The main dashboard area features a summary of proforma statuses: My Proformas (37), Needs Review (10), In Review (22), Approval Pending (3), Urgent (2), and Completed Proformas (25). Below this, there is a section for 'My Proformas' with a search bar, a 'Select' dropdown, and a 'Sort' menu. A table below lists individual proforma items with columns for Proforma Number, Client, Matter, Bill Group, Merck, Forwarded status, Total, Total Fees, Applicable, Status, and Due Date. The table shows six rows of data, each with a checkbox and an information icon.

Proforma Number	Client	Matter	Bill Group	Merck	Forwarded	Total	Total Fees	Applicable	Status	Due Date
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	In Review	05/19/2020
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	Approval Pending	05/19/2020
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	Urgent	05/19/2020
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	Completed	05/19/2020
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	Needs Review	05/19/2020
1234567890	Lorem ipsum dolor sit amet...	Lorem ipsum dolor sit amet, consectetur...	Merck	Merck	Forwarded	\$95,000	\$45,000	\$60,000 (BOA)	In Review	05/19/2020

3E Proforma provides an easy-to-read dashboard that lets you view proforma status to keep on top of productivity and profitability across your firm.

Contact your account representative to learn more today.