

Expert - Ease

Matter Management, Regulatory Compliance
and Financial Control for Experts



So what is it?

- Expert Ease stores all of your client and other contact details in one place
- It saves all of your communication with clients chronologically, including emails, letters, phone records, reports and notes
- You can access any record with the click of a mouse
- You can write to and email people easily and securely
- You can keep records of financial transactions and prepare invoices
- It is a perfect administrator
- It is **so** easy to use

MCR Search - showing only Roles'Combo1'

People Define Market Manager Help

Name	Phone	Company	Address	City	Postcode	Role
Barney Adams		Arcadia CC	Arcadia County Council, ,			FeeEarner
Steve Allsop			18 Dale Road, ,	Chichester		Party
Adams v flint ambc						Party
Charlie Bartlett		Fishers	Fisher & Sons, Solicitors, New Lane,	Arcadia		FeeEarner
Victoria Burton			37 Tavistock Close, ,	Sidmouth		Client
Luke Carlyle			Hampton Clinic, 12 Fosse Lane,	Hove		Psychiatrist
virgin credit card						utility bills
Helen Duncan			19 Box Tree Close, ,	Dulwich		Party
Margaret Dunne		Legal Services	Arcadia County Council, ,			FeeEarner
Dave Glover			Dun Roamin', Carts Lane,		Louth	Expert Witness
Gordon Hamilton			Dural, 23 Melbourne Ave,	Lytham		Client
Patricia Hamilton						FeeEarner
Penelope Harding		Grampions	65 Forest Drive, ,			Solicitor
Victoria Hewitt			Rainbows End, Park Road,	Filey		Party
Greg Hudson	018364987665		Gordon & Scott Solicitors, 23 Newgate R	Hythe		Solicitor
Patricia Morrell			167 Palmer Ave, ,	Redcar		Client
wetq rqrqe						Psychiatrist

Last Name Search

Company Search

Show Clients Only
 Show All Contacts

Role Search

Expert Ease provides a complete list of your clients and contacts. You can filter them by their Role and search by surname and company. Everyone you know is at your fingertips.

Details - Patricia Morrell

People Define Records Standard Documents Contact Time Recorder Bookkeeper Help

Details Records Notes

First Name	Patricia	Phone	01509 334762
Last Name	Morrell	Mobile	07728736158
Salutation	Dear Patricia	Fax	
Address	167 Palmer Ave	Email	pat.morell@hotmail.com
		DX	www.hamiltonindustries.co.uk
		Role	Client ...
City	Loughborough	DOB	
Postcode	LE11 7TH	Gender	
Company	Hamilton Industries	Child	<input type="checkbox"/>

Check for Duplicates Save and Close

Everyone's details are added in the same way, clients, contacts and suppliers. It makes it so easy to keep a track of who is who.

Details - Patricia Morrell

People Define Records Standard Documents Contact Time Recorder Bookkeeper Help

Details Records Notes

Show All Show All Show All

Work Type	Category	Document/File	Status	Date	Time	Sel
Appeal Option 2	Attch Recd	Decision Making 150309.pdf	Recd	22/09/2010	13:38	
Appeal Option 3	Email out	just testing.doc	Sent	30/09/2010	13:52	
Appeal Option 2	Attch Recd	Microsoft Office Outlook Test Message	Recd	02/10/2010	13:38	
Appeal Option 2	Attch Recd	MoJ new structure.pdf	Recd	12/10/2010	13:39	
Appeal 1	Drafts	Agreement of Purchase and Sale of St	Sent	12/10/2010	13:32	
Appeal Option 2	Attch Recd	expert pro forma letter.doc	Recd	19/10/2010	13:38	
Appeal Option 3	Bills	Law Autumn Show Catalogue.pdf	Recd	22/10/2010	13:38	
General Advice	Word Document	new type .doc	Sent	26/10/2010	13:49	
Appeal 1	Email In	METER REGISTRATION.doc	Recd	27/10/2010	13:35	
Appeal 1	Email In				13:35	
Appeal 1	Documents				13:47	
Appeal Option 2	Attch Recd				13:39	
Appeal Option 2	Attch Recd				13:38	
Appeal 1	Email In				13:35	
Appeal 1	Email In				13:35	
Appeal Option 2	Email out				13:52	

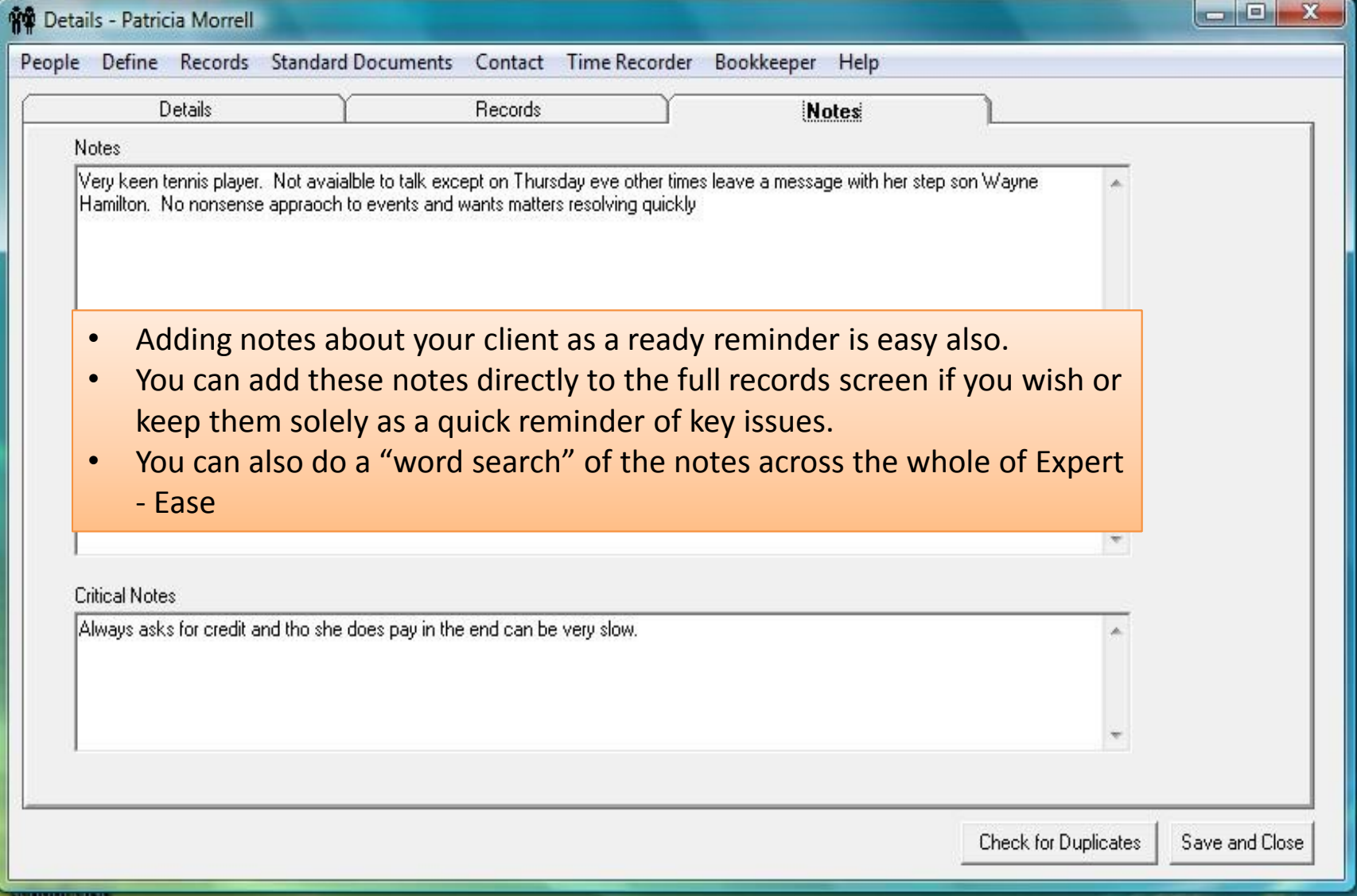
uplicates Save and Close

- Emails, attachments, documents are all stored in date order.
- Expert - Ease lets you define the nature of a record, e.g. an email out, and lets you name the record so it easy to find at a later stage.
- You can split your records for multiple work types or new matters for the same client.
- Expert - Ease is flexible to meet your needs.
- It also stores pictures, videos and sound files
- To access a record, simply double click

Client Record - Patricia Morrell

CATEGORY	DOCUMENT/FILE	STATUS	DATE	TIME
Appeal Option 2	Decision Making 150309.pdf	<u>Attch</u> Recd	Recd	22/09/2010
Appeal Option 3	just testing.doc	Email out	Sent	30/09/2010
Appeal Option 2	Microsoft Office Outlook Test Message.pdf	<u>Attch</u> Recd	Recd	02/10/2010
Appeal Option 2	<u>MoJ</u> new structure.pdf	<u>Attch</u> Recd	Recd	12/10/2010
Appeal1	Agreement of Purchase and Sale of Shares by Shareholder.pdf	Drafts	Sent	12/10/2010
Appeal Option 2	expert pro forma letter.doc	<u>Attch</u> Recd	Recd	19/10/2010
Appeal Option 3	Law Autumn Show Catalogue.pdf	Bills	Recd	22/10/2010
General Advice	newtype.doc	Word	Sent	26/10/2010
Appeal1	ME		cd	27/10/2010

- You can print a complete record of every stored record. Managing files is made simpler with Expert - Ease .
- Clients or regulators have an instant record of every action on a client's matter.



Details - Patricia Morrell

File People Define Records Notes Contact Time Recorder CashBook Outlook Help

Details **Records** Notes

From Go

To Clear

Show All Show All

Work Type	Category	Document/File	Date	Time	Sel
Assessment	Email out	Enclosed medical report.doc	13/06/2012	16:02	
Assessment	Report	Medical Injury Report prep by Nick Jenkins.pdf	13/06/2012	15:27	
Assessment	Word Document	2nd appt assessment.doc	29/05/2012	14:16	
Assessment	document	summary.docx	14/05/2012	16:50	
Assessment	Email out	Next appointment.doc	14/05/2012	16:50	
Assessment	Word Document	Assessment Notes.doc	14/05/2012	12:41	
Assessment	phone call out	AF spoke to PM re appt.doc	31/03/2012	08:50	
Assessment	Email out	Appointment.doc	31/03/2012	09:19	
Assessment	Email out	Confirm instruction to prepare a report.doc	28/03/2012	16:42	
Assessment	letter in	Receive letter of instruction.doc	28/03/2012	14:06	
Assessment	Email In	confirm instructions.pdf	20/03/2012	13:26	
Initial Instructions	Word Document	Call from G Hamilton, solicitor.doc	05/03/2012	08:09	
Initial Advice	Word Document	appointment.doc	05/03/2012	08:07	

Easy access and display of every action on a case makes selecting items for billing easy. At a glance you can see emails, attendances, letters and even invoices.

decameron software MyClientRecord Version 1.031 Save and Close

Time Record for: Patricia Morrell

File

Work Type Category
 Show All Show All Select All

Work Type	Category	Doc/File	Phone	Prep	Att	Travel	Wait	Lo	Li	Email	Dis (£)	Milage	User	Sel
Assessmen	Email In	confirm instructions.pdf	0	0	0	0	0	0	0	1	0	0	x	✓
Initial Advic	Word Doc	appointment.doc	0	0	0	0	0	0	0	1	0	0	x	✓
Initial Instru	Word Doc	Call from G Hamilton, solicitor.doc	12	0	0	0	0	0	0	0	0	0	x	✓
Assessmen	letter in	Receive letter of instruction.doc	0	36	0	0	0	0	0	0	0	0	x	
Assessmen	Email out	Confirm instruction to prepare a report.doc	0	12	0	0	0	0	0	1	0	0	x	
Assessmen	Email out	Appointment.doc	0	0	0	0	0	0	0	1	0	0	x	
Assessmen	phone cal	AF spoke to PM re appt.doc	0	0	24	0	0	0	0	0	0	0	x	
Assessmen	Word Doc	Assessment Notes.doc	0	36	90	0	0	0	0	0	0	0	x	
Assessmen	Email out	Next appointment.doc	0	0	0	0	0	0	0	1	0	0	x	
Assessmen	document	summary.docx	0	84	0	0	0	0	0	0	0	0	x	✓
Assessmen	Word Doc	2nd appt assessment.doc	0	30	120	0	0	0	0	0	0	0	x	✓
Assessmen	Report	Medical Injury Report prep by Nick Jenkins.pdf	0	150	0	0	0	0	0	0	0	0	x	✓
Assessmen	Email out	Enclosed medical report.doc	12	0	0	0	0	0	0	1	0	0	x	

Show Totals for all documents
 Show Totals for Invoiced documents only
 Show Totals for selected user
 Show Totals for Non-Invoiced documents only

TOTALS	Phone	Prep	Att	Travel	Wait	Lo	Li	Email	Dis (£)	Milage
Time (mins)	24	348	234	0	0	0	0	6		0.00
Amount (£)	£50.00	£724.99	£487.49	£0.00	£0.00	£0.00	£0.00	£90.00	£0.00	£0.00

Update Save and Close

Allocating time, keeping a record of what has been and what is yet to be billed is one of the greatest strengths of Expert Ease. Rates can be allocated by fee earner, and also by work type. Private, Legal Aid, London or non London rates are all stored and edited with the greatest simplicity. You choose what to bill, and...

Patricia Morrell
16 Gamekeepers Cottage
Toytown
TT23 3QN

02/12/2012

Invoice No. 123/456

Professional charges for work done.	
Detailed Break down attached.	
Preparation	£549.99
Attendance	£250.00
Travel	£0.00
Waiting	£0.00
Letters/emails	£30.00
Phone calls	£25.00
Mileage	£0.00
Sub Total	£854.99
VAT	£171.00
Disbursements	£0.00
Total	£1025.99

Please
Make

Then Expert Ease prepares an invoice. All at the click of a mouse. It could not be easier. You can select a simple invoice, or an invoice with a breakdown of all time items attached to it. It makes preparing invoices quick and efficient and gives the payee a record of what is being charged for, critical given the changes to legal aid and civil justice.

Work Type Category

Show All Show Al

Select All

Work Type	Category	Doc/File	Phone	Prep	Att	Travel	Wait	Lo	Li	Email	Dis (£)	Milage	User	Sel
Assessmen	Email In	confirm instructions.pdf	0	0	0	0	0	0	0	1	0	0	x	
Initial Advic	Word Doc	appointment.doc	0	0	0	0	0	0	0	1	0	0	x	
Initial Instru	Word Doc	Call from G Hamilton, solicitor.doc	12	0	0	0	0	0	0	0	0	0	x	
Assessmen	letter in	Receive letter of instruction.doc	0	36	0	0	0	0	0	0	0	0	x	
Assessmen	Email out	Confirm instruction to prepare a report.doc	0	12	0	0	0	0	0	1	0	0	x	
Assessmen	Email out	Appointment.doc	0	0	0	0	0	0	0	1	0	0	x	
Assessmen	phone cal	AF spoke to PM re appt.doc	0	0	24	0	0	0	0	0	0	0	x	
Assessmen	Word Doc	Assessment Notes.doc	0	36	90	0	0	0	0	0	0	0	x	
Assessmen	Email out	Next appointment.doc	0	0	0	0	0	0	0	1	0	0	x	
Assessmen	document	summary.docx	0	84	0	0	0	0	0	0	0	0	x	
Assessmen	Word Doc	2nd appt assessment.doc	0	30	120	0	0	0	0	0	0	0	x	
Assessmen	Report	Medical Injury Report prep by Nick Jenkins.pdf	0	150	0	0	0	0	0	0	0	0	x	
Assessmen	Email out	Enclosed medical report.doc	12	0	0	0	0	0	0	1	0	0	x	
Invoice	Word Doc	Invoice 123/456.doc												

When you return to the Time Recorder work done screen, anything that you have previously invoiced is shown in highlighted in yellow. So keeping track of what is owed on a case is instant. This feature will save you time and keep you updated.

Summary

So Expert-Ease acts as:-

- A record and case depository
- An archiving and storage solution
- A conflict checker
- A case management system
- An account management service
- A financial control tool
- A powerful reporting tool to comply with client and regulatory requirements
- It takes away much of the admin burden