



Legal First - Building the Best

Experts in thinking **inside** the square for legal software



Legal First runs inside any browser

Legal First has been developed using long standing industry knowledge, legal services accounting knowledge and trust compliance expertise with web based development tools.

Using the latest PostgreSQL database and Javascript programming.

Document production using Microsoft Word stored directly onto the matter in the browser.

Legal First has taken several un-rushed years to develop and has been funded by the remaining clients using a legacy system in Australasia, a select few beta clients and research and development grants.

The software is now ready for the Australasian and Asian markets (with support based in Australia, New Zealand and Singapore).

Please read on for why it is set to become one of Australasia's leading practice management systems for lawyers and professional services.

Legal First summarises data at account, client and matter levels at the time of posting transactions so that accessing account, client and matter information at any time is fast and up to date.

KPIs and reports are fully customisable to meet each firm's specific needs. There are over 400 secure reports out of the box with full search capabilities and reports can be marked as favourites per user.

Custom Fields at client, matter and staff level can be added easily at any time.

Per User **Dashboards** - intuitive and tailored for each users different needs with **Artificial Intelligence** on dashboards and all screens remembering each individual users preferences as they use the software.



Legal First - Strengths

- 100% Web Based - runs inside your browser - nothing to load on the computer!
- **Fast**, summarises at account, client and matter level for every transaction posted
- Constant balance checks. **IT MUST BALANCE. It is an accounting system**
- Handles both accruals and cash based accounting. Easy to switch between them
- Written from an end users perspective with support in mind
- Full data updates (for Dashboard, KPIs and reports). Speedy access to information
- Impressive real-time management reporting and EIS (Executive Information System)
- Caters for both Cash Based and Accruals Based accounting
- No down time, fast backups and fast scripted upgrades
- No unnecessary restrictions
- Alerts
- Custom fields
- Interactive and customisable parameter driven reporting
- Designed to be fast - so it will scale for large organisations
- Everything required to run a law firm from the one system and provider

Legal First Practice Management System - All the necessary ingredients are in LF

- Contacts - Clients, Staff, Suppliers and Other (track prospects)
- CRM capabilities - allowing users to connect contacts in any way, report and merge
- Matter Management
- Custom Fields
- Timesheet Entry
- Timers
- Time and Disbursements by Matter
- Bills “Bill any cent of any item to anybody”
- Notes
- Disbursements
- Reports
- Accounts
- General Journals
- Bank Reconciliations
- Creditors
- Account Budgets
- Staff Budgets
- Safe Custody
- Trust
- Investments
- Security
- Workflow
- Document Production and Storage on matters and contacts
- Email Production and Storage on matters and contacts
- Foreign Currency
- Integration with Outlook
- Integration with iManage, M-Files and Net Documents - the leaders in document management (but now with it's own very good document management capabilities)



100% Web Based

Legal First is 100% web based - it runs in a browser - simply open any approved browser and log in for all capabilities. Legal First can even be used on your mobile phone. No software to load (other than an approved browser and optionally Word and it's affiliates). It can be run securely on the internet or inside your own secure intranet.

Written from an end users perspective with SUPPORT in mind

Legal First has been designed with "supporting end users in mind". The design is based fundamentally on the requirements of individuals supporting and using the system.

3 parts of a Legal PMS - Summary Tables, GL, Practice Management (PMS) Tables

The General Ledger is where all your data is accumulated for accounting purposes - it must be reliable and balance with your practice management tables and the data summaries. Practice Management System tables store all details like timelines and bills, data summaries store data in summary format for fast access and sorting.

Real Time Balance Checking and Alerts (as a result of the above)

Why are we showing the most technical report as the introduction to Legal First? That is a question with many answers. See below for the way Legal First patrols balances at all levels.

This makes Legal First easy to support - it was written with users and support in mind. If a system is easy to support - then it's end users can use it with confidence and ease. The Accounts Overview Report is the all-seeing report - all aspects of your business are monitored, displayed and checked. Knowing that all aspects of your system balance is the most important factor for any professional services business.

Omnipotent Lawyers 1						
Accounts Overview						
Practice Area	Practice Management Master Summaries	PMS Table Totals	General Ledger Account No. and Name		GL Account Balances	
Debtors	34,021.02 g	34,021.02 g	157210	Client Debtors	34,021.92 g	
WIP	3,807.96	3,807.96 g	157250	Work in Progress	3,807.96 g	
Unb. Soft Discs	66.45	66.45 g	157230	Unbilled Soft Disbursements	66.45 g	
Unb. Misc Discs	0.00	0.00 g	157231	Unbilled Misc Disbursements	0.00 g	
Unb. Hard Discs (Peel Crd)	0.00	0.00 g	019767	Unbilled Hard	0.00 g	
Total	208,323.70				258,325.70 g	
Unpaid Trade Creditors		3,003.19 g	175100	Trade Creditors	3,003.19 g	
Unpaid Prof Creditors		114.19 g	175200	Professional Creditors	114.19 g	
Unpaid Misc Creditors-should be ZERO		0.00			0.00	
Fees Posted Cr/Bills		455,327.00 g		Fees Income	455,327.00 g	
GST Paid from 1/04/15 to 30/06/15			178600	GST on Purchases	265.91 g	
GST Collected from 1/04/15 to 30/06/15			178700	GST on Sales (Possible)	2,738.65 g	

Three parts of the system displayed and all aspects shown ON ONE PAGE. To analyse any aspect in more detail - click on the drill to the right of any amount. REAL time balancing with drill down capabilities.

Makes using, balancing and supporting easy. Gives all parties a Birdseye view of the current system balances.



Drill down Part=General Ledger- Aspect=Debtors to see the details by client held in your GL

General Ledger Details				
Debtors - \$57,210 - \$34,021.92				
DATE	Matter	BILL NO	BILL AMOUNT	CURRENT AMOUNT
A Pleasure To Deal With Pty Ltd-7				
01/04/15	10002 Industrial/Law A Pleasure To Deal With Pty Ltd	10000	3,000.00	
01/04/15	10001 Contract Law A Pleasure To Deal With Pty Ltd	10002	2,047.32	
01/04/15	10003 CLO to LegalFirst Project A Pleasure To Deal With Pty Ltd	10003	6,000.00	10,400.00
A Plumber Called O'Brien To Prove Apostrophe's Work Pty Ltd-8				
01/04/15	10004 Industrial/Law A Plumber Called O'Brien To Prove Apostrophe's Work Pty Ltd	10005	1,000.00	
01/04/15	10003 Contract Law A Plumber Called O'Brien To Prove Apostrophe's Work Pty Ltd	10000	3,400.00	
01/04/15	10005 CLO to LegalFirst Project A Plumber Called O'Brien To Prove Apostrophe's Work	10000	8,070.75	13,180.07
Abs Gymnasium-10				
02/04/15	10007 Contract Law Abs Gymnasium	10700	600.00	
02/04/15	10008 Industrial/Law Abs Gymnasium	10700	1,840.00	
01/04/15	10000 Industrial/Law Abs Gymnasium	10004	1,840.00	
01/04/15	10007 Contract Law Abs Gymnasium	10011	200.00	4,180.00
Absolutely Springfield Pty Ltd-9				
01/04/15	10008 Industrial/Law Absolutely Springfield Pty Ltd	10000	1,000.00	
01/04/15	10005 Contract Law Absolutely Springfield Pty Ltd	10007	700.00	2,170.00
Apple and Pear Board-12				
01/04/15	10011 Contract Law Apple and Pear Board	10004	600.00	600.00
Bartocks Wise Bar-20				
01/04/15	10017 Commercial Law Bartocks Wise Bar	10001	200.00	100.00
Bazinga Science Labs-21				
08/01/15	10053 Payroll/Bazinga Science Labs	10740	10.00	
20/01/15	10053 Payroll/Bazinga Science Labs	10740	20.00	
01/02/15	10019 Commercial Law Bazinga Science Labs	10719	200.00	
04/02/15	10053 Payroll/Bazinga Science Labs	10773	20.00	
12/02/15	10053 Payroll/Bazinga Science Labs	10774	20.00	
31/02/15	10053 Payroll/Bazinga Science Labs	10775	20.00	
02/03/15	10010 Commercial Law Bazinga Science Labs	10700	200.00	
05/03/15	10053 Payroll/Bazinga Science Labs	10704	20.00	
10/03/15	10053 Payroll/Bazinga Science Labs	10705	20.00	
20/03/15	10053 Payroll/Bazinga Science Labs	10707	20.00	
01/04/15	10019 Commercial Law Bazinga Science Labs	10002	200.00	900.00
CA-45				
02/04/15	10005 Project Work CA	10700	600.00	
01/04/15	10005 Project Work CA	10005	200.00	800.00
Cletrapaulo-139				
01/11/14	10054 Payroll/Cletrapaulo	10000	52.00	
20/11/14	10054 Payroll/Cletrapaulo	10721	10.00	
27/01/15	10029 Searches Cletrapaulo	10700	100.00	
30/01/15	10054 Payroll/Cletrapaulo	10700	57.00	
01/04/15	10020 Commercial Law Cletrapaulo	10000	310.00	620.00
			Total: \$34,021.92	

If any aspect of your system falls out of balance - which seldom happens nowadays in Legal First (due primarily to this kind of monitoring in the first place) an email is sent to Legal First support.

We must patrol it as we are not omnipotent (no one is) and we cannot (nor can you) check your system for technical issues, user errors (e.g. unforeseeable user key press combinations) or the odd mistaken enhancement in all places, at all times.

Legal First has the above process in place to capture any discrepancies quickly and before any major damage can be caused. It is an accounting system.

This unique monitoring system - based on 20 years' experience supporting large legal practices - is a fundamental key to the success of the Legal First software.

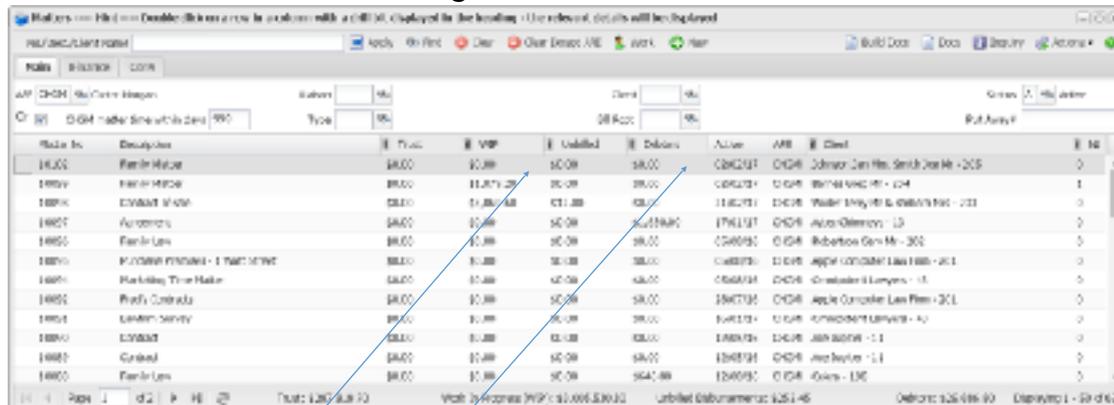
This unique monitoring and analysis allows management users and support to monitor the software with no interruption to end users.

It forms the fundamental method used to test Legal First and its data integrity.



Real Time Summaries.

All Client and Matter Balances are summarised “real time” within Legal First. This allows for fast reporting and displaying of all aspects of Legal First. To illustrate this -see the screenshot of the Legal First Matters Home Screen below:



Sort by any aspect by simply clicking on the column heading - real time. This is important-a system with 100,000+ matters works like a system with 100.

Summaries allow for fast and detailed reporting - for example the Operations Report (designed based on current public company and big business requirements) brings together all the information about your business on to one screen.

Legal First Operations Report



See Net Position improve, bank balance increase and trends trending, all on one screen.



Full Data Summary, EIS and KPI Reporting.

Summarised data allow for more detailed KPI reporting.

EIS - Executive Information “Numbers View” Click any area to display more details

LEGAL FIRST

EIS - Executive Information System - Executive Fees - March 2015

Drill Down... Click MTD or YTD --- PART 5 - THE ANALYSIS --- ADDITIONAL VIEWS - CLICK ITEMS THROUGH VIEW

Fees		Actual	Budget	Variance	Scheduled	Premium	Over %	By Department	By Client
Month	MTD	21,178	20,252	926	122%	4,181	93.2%	MTD	MTD
Year	YTD	221,575	173,200	48,375	128%	9,922	93.9%	YTD	YTD

Chargeable Time

	Actual Hrs	Budget Hrs	Value	Adjusted
Month	148	110	130	295%
Year	1,543	969	2,464	147%

Client Breakdown

	Actual Value	Budget	Variance	Adjusted
Month	71,919	20,252	51,667	354%
Year	704,293	173,200	531,093	419%

Non-Client Time

	Value	Hours
Month	0	0
Year	0	0

LOOK AT OTHER DEPARTMENTS, CLIENTS, MATTERS, HANDLERS & BILLABLES

	Debit	WIP	Open Dates	Closed Dates	Closures	Total Debt	Total Credit	Balance	High/Low	Comments
5-20-15	111	0	0	0	0	0	0	111	High/Low	WIP
30-2015	11	0	0	0	0	0	0	11	High/Low	WIP
60-2015	1	0	0	0	0	0	0	1	High/Low	WIP
90-2015	1	0	0	0	0	0	0	1	High/Low	WIP
120-Cases	0	0	0	0	0	0	0	0	High/Low	Creditors
180-Cases	0	0	0	0	0	0	0	0	High/Low	Creditors
190-Cases	0	1,214	0	0	0	0	0	1,214	High/Low	Creditors
Total	123	1,214	0	0	0	0	0	1,337		

Month Report: MTD Fees

LEGAL FIRST

EIS - Executive Information System - March 2015 - Fees by MTD - Fees Value by Fee Earner Name

Fee Earner	MTD Fees	MTD Budget	Actual	Adjusted	MTD Premium	YTD Fees	YTD Budget	Actual	Adjusted	YTD Premium
601 - Admin Fees	6,000.00	7,000.00	5,000.00	85.7%	1.00	62,000.00	60,000.00	5,000.00	80.0%	0.00
602 - Client Matters	8,000.00	7,000.00	9,000.00	128.6%	0.00	90,000.00	60,000.00	20,000.00	90.0%	1,000.00
611 - Other Matters	2,000.00	7,000.00	4,000.00	57.1%	1.00	20,000.00	20,000.00	4,000.00	80.0%	0.00
603 - Other Matters	5,000.00	0.00	1,500.00	30.0%	0.00	10,000.00	0.00	10,000.00	0.0%	0.00
604 - Other Matters	0.00	0.00	0.00	0.0%	1.00	0.00	0.00	0.00	0.0%	0.00
Total	21,000.00	28,000.00	29,500.00	105.4%	3.00	222,000.00	150,000.00	49,000.00	87.5%	1,000.00

Click again for further analysis - Fees by Client - Click on any client to see matters etc.

Month Report: MTD Fees

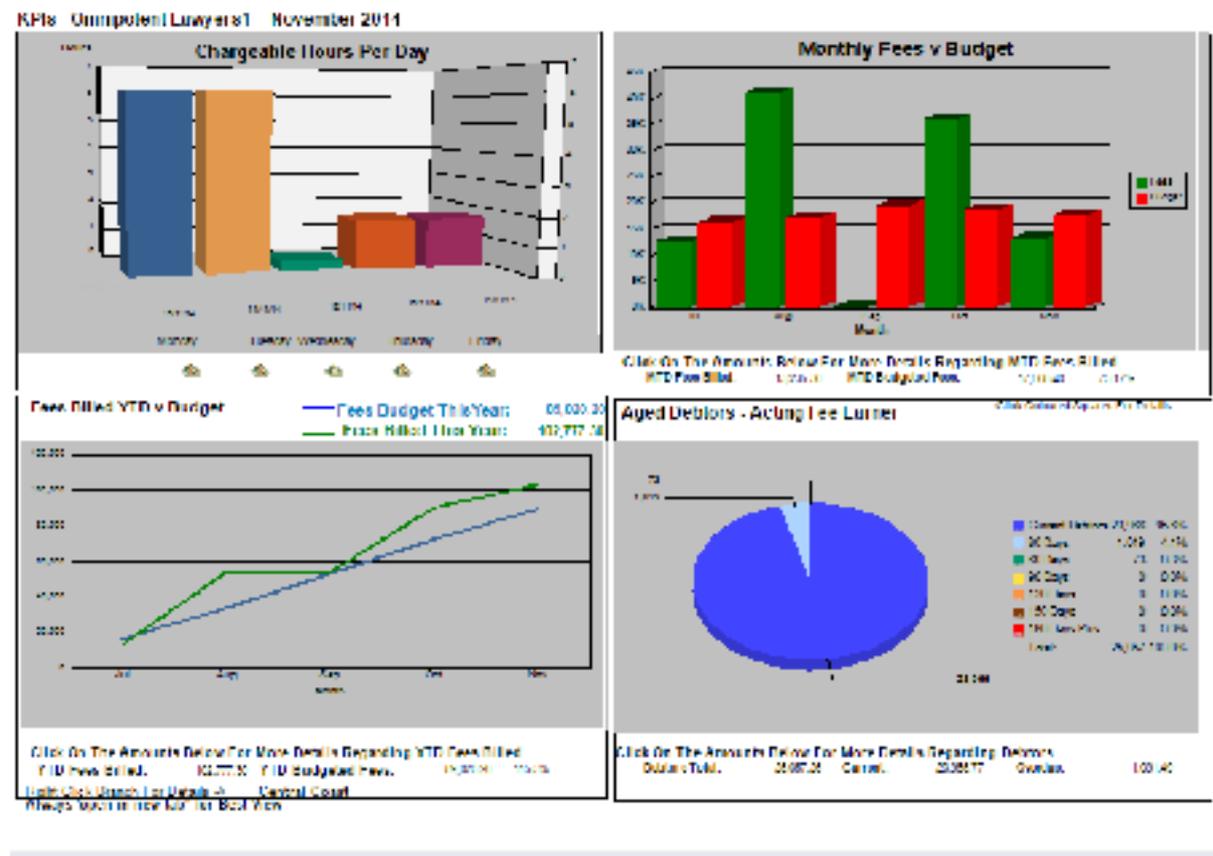
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EIS - Executive Information System - March 2015 - Fees by MTD - Fees Value by Fee Earner Name

Client	MTD Fees	MTD Budget	Actual	Adjusted	MTD Premium	YTD Fees	YTD Budget	Actual	Variance
1 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
2 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
3 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
4 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
5 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
6 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
7 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
8 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
9 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
10 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
11 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
12 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
13 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
14 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
15 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
16 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
17 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
18 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
19 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
20 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
21 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
22 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
23 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
24 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
25 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
26 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
27 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
28 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
29 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
30 - Admin Fees	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.00

Drill down to the details making up each summarised number.

Customisable Dashboards.



Graphical Dashboards - customisable.



Accounting Date

Small businesses often want to just post their data ... when they can get to it.
Larger businesses want users entering in data all day, every day.

For the latter - the accounts department should want and need an Accounting Date.
Accounts dictate when the previous accounting day (month and/or year) has ended.

Legal First caters for both.

So - at any time the accounts department can change the accounting date to the new day, month or financial year.

Upon date change, Legal First emails a set of pre-ordained and customised reports to management.

To the end users - it will mean that if they have not entered their time for the month, day or year passed by - they will be posted into the accounts for the current period.

This feature means that the accounts department and management can read and analyse any reports knowing that the figures are never (*) going to change.

(*) Note - that if the Accounts department do decide to revert the Accounting Date backwards - this **is allowed** and is **as simple as changing the accounting date backwards** again- but the finalised pre-ordained reports and customised reports must be re-processed and emailed when the date is changed forwards, once again.

Cash Based and Accruals Based Accounting

Similarly - small firms will be cash based for GST and accounting, large firms will be accruals based.

Legal First caters for both of these accounting essentials and can change from one to the other.



No Down Time

When an accounting date change is made or a data backup is taken there is **absolutely no downtime for users**.

Therefore, during the normal usage of Legal First, no one waits for anyone.

The only time the system is not available is when it is being upgraded and such is the design and nature of Legal First, this is easy to do and usually takes about 5 minutes and is executed after normal business hours.

No Unnecessary Restrictions

Similarly - there is nothing that anyone can process or perform in Legal First that will restrict other users in anyway at any time. Of course, Legal First has security and users can be restricted from certain areas. For example -adding and maintaining staff members can be restricted to management users only. Paying and receiving money can be restricted to accounts users only.

Alerts

Email alerts of any kind can be setup and can be triggered at a certain time or at the press of a button.

Outlook Integration

Emails automatically or manually saved against matters.

Task Management and Workflow

Tasks can be assigned to matters either automatically or manually.

Workflows can be setup using the accounts workflows and task templates to assign workflows and tasks to matters by type upon creation.

For example - documents for cost assessment and trust compliance can automatically be applied to matters by type upon creation. Along with things like Matter Opening Fees and/or Fixed Fee Charges and any task templates can be assigned to matter types.

CRM capabilities

Contacts can be identified as leads/prospects when crated and tasks assigned at contact level to patrol the path of turning prospects into clients.

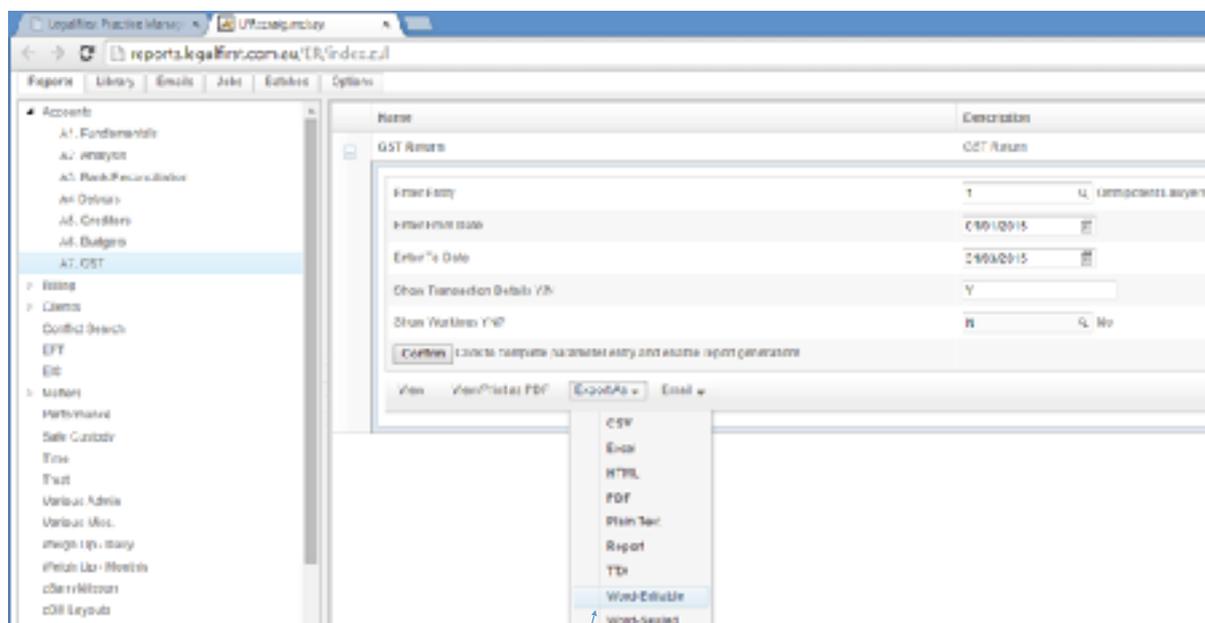
Custom Fields

Custom fields of any type can be added to the system for matters (can be differentiated by matter type) and/or contacts (clients, staff, suppliers and prospects).

Interactive and Parameter Driven Reporting

All relevant report parameters can have a search button to query the database.

The system uses the accounting date to make sensible defaults for all its date parameters - e.g. in April the GST returns report defaults to the previous quarter - in March it defaults to the current quarter.



Simply View, Print or Export (as just about anything) any report.

Reports can be secured giving only the access warranted for each user.

Users can mark any report as a favourite to make them easier to find as there are over 400 reports available in the standard Legal First product.

Document and Email Production

We can provide document templates or you can use your own or any combination of the two.

Any data field in Legal First can be merged with any document or email.

Documents are stored on matters and/or contacts and are easily accessible from inside the browser.

100-point identification compliant

Simple scan and drop any identification clients are willing to divulge and store them securely against each contact.

Full Trust Reporting Compliance

Full trust compliance. Trust report management screen with all reports required in one easy to manage screen. Automated and manual trust statements and receipts.