

# Equitrac Active Integration Billing Connector



## Automatic and accurate matter-centric cost allocation.

Completeness, speed and accuracy in recovering reimbursable costs depends on employees charging expenses to correct client/matter codes. But manual cost recovery approaches can be inefficient, slow and error-prone. Manually exporting client/matter tables or importing transactions can invite mistakes or delay availability of new client/matter codes to employees waiting to use them. Incorrect, invalid or missing billing codes for client-related copies, prints and scans can in turn delay invoicing and cost recovery.

Now, Equitrac Active Integration – part of the Equitrac Professional® 5 cost recovery solution – simplifies and increases your recovery of client costs by automatically exchanging client/matter and expense information, in near real time, with all leading time and billing (T&B) and practice management systems.

### Two systems combined into one powerful revenue generator.

- Capture, allocate and bill for any client related expenses, anywhere in your firm, without changing the way your attorneys work.
- Increase billing accuracy; reduce disputed items and writeoffs.
- Speed invoice completion, cost recovery and cash flow.
- Increase the return on your T&B system investment.

### Saving time, increasing accuracy.

Equitrac Active Integration makes matter-centric cost recovery a routine and virtually automatic part of recoverable activities. New client/matter codes are made available to Equitrac users within minutes of creation. Easy-to-use search and history features let users quickly find client/matter codes at their own desktop, at copiers and MFPs, or at any Equitrac device. All captured activity is transferred automatically to the billing system with no exceptions or errors allowing rapid billing cycles and faster recovery of billable expenses with fewer write-offs.

### Processes designed for precision.

Pro-active fault detection and timely error notification alert administrators in case of data transfer issues or problem transactions. Web-based exception editing lets you allocate, correct and approve expenses from any PC, ensuring that transactions are correct before reaching the billing system.

### One platform for fully integrated cost recovery.

Equitrac Professional 5 allows you to import all client disbursement items such as research, couriers, postage, phone calls and catering. With Equitrac Professional 5 connected to your billing system through Active Integration, you get a single, seamless, solution for realizing your full cost recovery potential.

*"The solution took only 2.8 months to pay for itself because we were losing more revenue than we thought."*



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The Legal Profession's Leading Cost Recovery Solution

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## Multiple approaches to one result: increased cost recovery.

Through either product-specific application programming interfaces (APIs) or push or pull interaction with ODBC-compliant databases, Equitrac Active Integration works seamlessly with the legal profession's most popular T&B and practice management systems, including software from Elite®, Aderant™, LexisNexis®, Juris®, Tabs3™, Timeslips, OMS, Orion, Axxia®, AIM, Videss and others.

### API Integration.

API interfaces to the Aderant®/CMS and Elite practice management systems feature automatic transfer of transactions cost data to T&B and near-real time synchronization so that new client/matter billing codes are available immediately across the entire firm at every desktop and MFP. Equitrac transactions are delivered directly and automatically to the billing application to eliminate manual and error-prone batch processing.

### ODBC validation integration.

Based on similar technology developed for Microsoft Active Directory synchronization, Equitrac's ODBC validation approach provides effective validation integration with all ODBC-compliant databases. An automated wizard quickly and effectively maps Equitrac Professional 5 to one or more source databases; periodic traversal of the ODBC source tables keeps the Equitrac tables synchronized with additions, changes and deletions. ODBC validation integration requires no programming or scripting, supports third party integration tools and can avoid billing vendor export fees and configuration.

### ODBC transaction pull from Equitrac Professional® 5.

Time and billing systems that can read external ODBC sources can access Equitrac Professional 5 to collect transactions that are ready to post for rapid and timely pre-bill processing and invoicing. No configuration or process initiation is required on the Equitrac Solution and transactions can be processed as frequently as necessary.

### ODBC transaction push to time and billing.

With little or no special configuration and customization, Equitrac Professional 5 can deliver transaction data to one or more external ODBC tables in the time and billing system's data base in an easily processed native format. Manual or scheduled process initiation from within the billing system provides a connection as reliable as an API integration.

### ODBC transaction integration to third party tool.

Using either transaction push or pull, Equitrac Professional 5 can deliver transactional data to a third party integration tool such as IntApp™, making it easy for firms to manage synchronization and transactional data exchange with external systems.

### Flat file validation and transaction integration.

Equitrac Professional 5 still supports the exchange of local or network flat files with validation and transaction information in virtually any format. Validation files on the network can be processed as soon as they are updated for immediate access to new client/matters across the Equitrac solution. Transactions can be exported in summary or detail format for periodic import processing by the time and billing system.

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## Advanced Features

### Comprehensive integration techniques

- API integration with select partners
- ODBC validation and transaction integration
- Flat file integration
- Microsoft® Active Directory integration

### Comprehensive reporting

- Billing detail report
- Billing summary report
- Billing batch reports

### Exception and approval handling

- Stop problem transactions for review and correction before they enter the billing system
- Set rules for transaction approvals and exceptions
- Direct email notification of exceptions and approvals to users
- Allow users to manage exceptions and approvals from their desktop with web based tools
- Proxy rights so that assistants and managers can access data for others

### Integrates with current technology

- Supports all ODBC compliant databases as validation sources and transaction table destinations
- Equitrac transactions in Microsoft® SQL or Microsoft® SQL Server™ 2005 Express Edition database for external pull

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