Datolite SOLUTIONS

3E PAPERLESS
PRODUCT ENHANCEMENTS

Through experience gained from implementing many Paperless Proforma projects, the Datolite team have identified value add functionality that helps both front and back office Paperless users. This functionality, along with common customizations that the Datolite team can conduct, will boost adoption of the Paperless Proforma application within firms.

OUR PRODUCT ENHANCEMENT OFFERINGS ARE AVAILABLE FOR YOUR FIRM'S UNIQUE NEEDS.

DP

PAPERLESS DRAFT PREVIEW

Leveraging your firm's EDG templates for invoices and proforma formats, Datolite has built a Paperless Addon that integrates EDG with Paperless Proforma. With this Add On, users can generate a PDF preview of a marked up proforma as a draft invoice or in a proforma format. Firms can recognize huge time savings for the billing team as requests to create draft bills are no longer required.
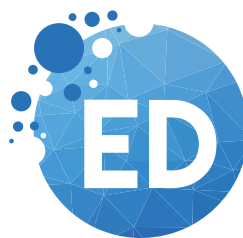
CLICK HERE FOR MORE INFO

LF

PAPERLESS LONG FORM VIEW

Display all proforma content on a single page as opposed to across multiple tabs. This Add On allows for more easy access to all information on a page while reducing the number of 'clicks' required to improve the user experience.

CLICK HERE FOR MORE INFO

ED

PAPERLESS EMAIL DIGEST

Allows reminder email notifications to be configured to send a summary of all outstanding proformas to be submitted, on a daily, weekly, or bi-weekly basis. This series of automated email reminders saves the billing team time from chasing attorneys to submit their proformas.

CLICK HERE FOR MORE INFO

AR

PAPERLESS ADVANCED REPORTING

Report on the firm's proforma editing process from front office to back office. Reporting can be done at the Firmwide or Assigned Biller level. Highlighting funds being used (trust, boa, unallocated). Various at a glance views of the proformas in process.

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CONTACT US FOR MORE INFORMATION

Datolite SOLUTIONS

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