



The Advantages of Fully Integrated Front and Back Offices



IF YOU'RE STILL USING DIFFERENT SOFTWARE APPLICATIONS FOR FRONT OFFICE AND BACK OFFICE THEN IT'S TIME TO ASK YOURSELF WHY.

CLOUD COMPUTING BRINGS ENTERPRISE-GRADE SOFTWARE TO SMALLER FIRMS GIVING YOU MORE CONTROL, BETTER VISIBILITY, A CENTRAL DATABASE, AND IMPROVED STAFF PRODUCTIVITY - ALL AT A LOWER COST.

Business Accounting

Actionstep has a full general ledger so it handles not only your client billing, but all other aspects of your business such as accounts payable/receivable, banking, check writing, and financial reporting. But best of all the accounting information is fully integrated with your front office so you can easily account for time, disbursements, and matter profitability.

Trust Accounting

Actionstep helps you manage any funds you hold for your clients by tracking each matter's "claim" to the funds held in your trust bank accounts. Built-in rules and special reports help you to stay in compliance with state bar ethical requirements.

A (VERY) BRIEF HISTORY

Let's rewind a decade or two.

Big businesses learned very early on that they could not grow successfully without fully integrated information systems. They needed visibility across marketing, sales, production, and finance. But in those days it took an army of programmers and a truckload of hardware to pull this off.

ERP

These systems were called "enterprise resource planning" applications or "ERP" for short (a horrible acronym for sure, but it stuck). Unfortunately they were way too expensive for small businesses.

Small businesses were forced to cobble together a set of non-integrated desktop programs like spreadsheets, contacts lists, email, calendars, and accounting applications to manage their operations. Not ideal.

THE "CLOUD"

Cloud computing has leveled the playing fields and enabled software manufacturers to offer a centralized service to a multitude of clients. This has dramatically reduced the cost of deployment and allowed the manufacturers to offer enterprise-grade features to small businesses at a modest monthly cost.

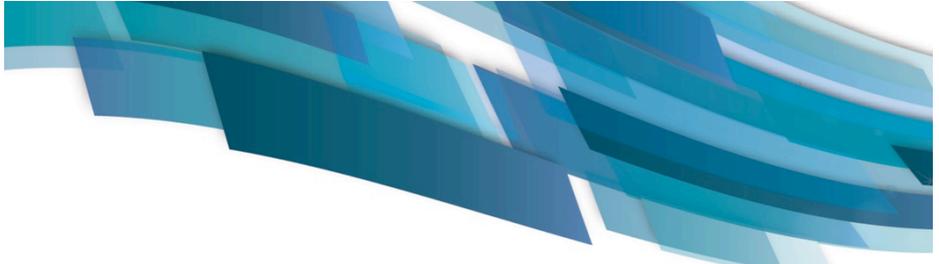
ACTIONSTEP

Actionstep offers a fully integrated "ERP" solution which spans the whole operation; from marketing and sales to matter management, billing, accounting and reporting.

A single central database means that you only have to enter data once and everything is linked from that point forward. This gives you enterprise-wide reporting and allows staff to input and access accounting data in the front office.



A CENTRAL, SHARED
DATABASE IS THE KEY TO
GOOD INFORMATION



actionstep

Seriously Good Practice Management Software

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TECHNICAL SUPPORT

Need help? Give us a call or send us an email.

Technical support is included in your monthly subscription. Optional paid consulting is available for system setup, data migration, and training.

COST

With Actionstep you get the whole enchilada for just \$60/user/month (may vary by currency).

No long-term contracts.

<http://actionstep.com/pricing>

FREE TRIAL

See for yourself: signup for a free trial, or register for a demo.

Or just give us a call to discuss your needs.

<http://actionstep.com/contact>

Why your life will be easier

Here are just a few ways a fully integrated system will help you...

DON'T MISS ANY BILLABLE ITEMS

Task timers, and automatic suggestions based on user activity make it easy for staff to fill in the blanks on their timesheets. Disbursement templates and the ability to code invoice and credit card line items to matters make it easy to recover costs. On the road? No problem, use our mobile app to enter time.

GET PAID ON TIME

When you add a calendar appointment Actionstep tells you if the client owes you money so you can collect it at the meeting. Get a list of your accounts receivable emailed to on a regular schedule, and launch debt-collection workflows to manage past-due accounts. You work hard, you might as well get paid!

GET RID OF BOTTLENECKS

Don't let your bookkeeper or trust accountant be the information bottleneck in your firm. Actionstep presents the accounting data right within the matters and gives your staff immediate access to this information. No more sending requests to "accounts" to find out the financial status of a matter. Permissions ensure that staff members only see what you want them to see.

NO DOUBLE DATA ENTRY

Because a central database is shared across the organization you only need to enter data once. A single contact record is kept for your client and linked to all activity from the first time they touch your website to the final invoice of the last job. If you open a contact record you can see the full history of that contact's activity with your firm.

VISIBILITY ACROSS THE FIRM

A central database provides you with unprecedented reporting capabilities. You can track the profitability of your marketing campaigns by comparing the actual costs of the campaigns against real revenue banked from leads resulting from each campaign. And because the accounting data is linked to matters you can get instant visibility into matter profitability and how your staff are spending their time.