



Jay Hong

Account Manager  
[jay.hong@lexisnexis.com.au](mailto:jay.hong@lexisnexis.com.au)

Mobile:   +61 466 843 782

Lexis *Affinity*™

Proposal for <CUSTOMER>

<DATE>

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# Executive Summary

LexisNexis is pleased to respond to a request from <CUSTOMER> with this proposal to solve the following challenges:

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# Why choose Lexis Affinity™

Smart firms choose Lexis Affinity™ for many reasons, including:

* It has a single integrated design, providing lower software costs and maintenance
* It is developed here in Australia and backed by a global organisation committed to Affinity’s support and continued development
* It is a proven application with a refined and intuitive design; and
* Our implementation method is professionally planned and coordinated, by our delivery team who carry over 40 years of experience delivering legal software solution

# Solution Specifics

This is where we spell out what we’re proposing:

1. Lexis Affinity™   
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
2. Integrity Server  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
3. Client Portal  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
4. Affinity Mobile  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
5. Settlement Adjuster  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
6. Empower  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
7. LexisNexis Searches (GlobalX)  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
8. LexisNexis Searches (InfoTrack)  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
9. SAI Global Integration  
   This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
10. PEXA Integration  
    This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
11. Macquarie Bank Integration  
    This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
12. mitimes Integration  
    This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
13. FeeSynergy Integration  
    This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.
14. Fileman Integration  
    This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing. This is a description of the thing we are proposing.

# Important notes

Please consider the notes below:

1. I have included a conditional discount. Final approval by our Credit Team is required. The offer includes:
   1. One-off costs discounted by 40%
   2. Ongoing support and maintenance costs discounted by 30%
   3. A payment plan over 36 months to minimise cash flow impact on you.
2. Costs after 36 months would be for LexisCare Maintenance only. The monthly outlay therefore is reduced significantly. Please see “Repayments” for further details.
3. All prices exclude GST.

# Assumptions and Exclusions

These assumptions and exclusions were made in preparing this proposal. I am happy to clarify or amend any you require.

1. Affinity has a range of optional features which I have excluded. In preparing a formal proposal, we will review and discuss all inclusion and exclusions to ensure accuracy.
2. I have included an allowance for data migration from FilePro, including an essential trial migration for validation and testing.
3. There are no automated Smart Precedents included in this proposal. If you would like information about available practice areas, or jurisdictions, please send through your desired practice area selections and user numbers and I’ll update the repayments table below.
4. This pricing expires on Monday 24 June 2019.

# Repayments

|  |  |  |
| --- | --- | --- |
| END USER TRAINED | Affinity – 50 concurrent users | Monthly per User |
| Initial Payment | $2,000.00 |  |
| Year 1 (per month) | $5,947.42 | $118.95 |
| Year 2 (per month) | $5,947.42 | $118.95 |
| Year 3 (per month) | $5,947.42 | $118.95 |
| *Indicative costs below after 36 months.*  *Please note a significant reduction for Affinity as the once-off costs have been repaid*. | | |
| Year 4+ (per month) | $2,572.35 | $51.45 |

Repayments include:

1. Includes discounts and terms detailed in “Important Notes”.
2. Includes software, installation, data migration, training, consulting, project management, 3 years ongoing helpline support and software updates.

# Appendix I - The power of Lexis Affinity™ (or something)

A picture containing beverage

Description generated with high confidence

## Lexis Affinity provides a range of flexible features to support the daily operation of a busy modern law practice, including:

* Manage your entire caseload more effectively, using our Client and Matter Management tools
* Keep track of what’s happening and look over the horizon to see what’s coming, with centralised scheduling and diary (inc. Key Dates tracker, Matter-based Diary, integration with MS Exchange Server)
* Automate delivery of common tasks, to reduce effort and improve quality, using custom Workflows and Procedures (Legal and Business Process Automation)
* Manage the firm’s entire library of precedents in a single location and ensure the right documents are available to all authors
* Adapt to changing needs for information and automate document drafting, using custom DataForms (no programming required)
* Re-use data to automate drafting of legal documents and correspondence (inc. email precedents and pre-populated automated forms and precedents)
* Find and update documents quickly and easily, even if you don’t have all the facts of the matter to hand, using flexible Document Management tools (inc. Drag-and-drop filing from Windows and Outlook, and full-text index searching)
* Maximise the impact of your legal research by integrating the Lexis Advance legal research platform with Affinity. Store research links and history on matters for easy review and reference
* Simplify the daily work of scheduling, and reviewing inbound and outbound correspondence using Affinity’s integration with Microsoft Office tools (Outlook, Word, Excel and MS Exchange Server)
* Keep on top of Time Recording with our range of different recording features
* Organise and manage routine Billing with less effort and more control – including ebilling, ecollection, multi-party, consolidated and split billing, auto-generation of draft bills following system rules, etc.)
* Office Accounting
* Trust Accounting (certified by NSW Law Society)
* Investments (Controlled Monies, Monies in Transit, Monies under a Power)
* General Ledger – multi-Entity, Branch, Department
* Budgets (inc. Employee and G/L)
* Finance Requisitions (inc. Authorisation control)
* Bank Reconciliation
* Creditor management (inc. scheduled payment runs)
* Flexible Fees and Rates (inc. Scale Costing and Fixed Fees)
* Improve the efficiency of your back-office, by integrating Cost & Disbursement recovery systems
* Understand and analyse your market with Affinity’s flexible Contact and Relationship Management functions
* Manage business development and marketing activities, leveraging the flexibility of custom data forms and Affinity’s powerful filter and search tools
* Analyse performance across the practice, with our suite of Reporting options – both financial and performance based (inc. Dashboards, adhoc queries & filters, custom report developer)
* Reduce cost and effort managing Safe Custody of documents, including preview of electronic copies for fast and easy access
* Keep control over Affinity with Role-based and Team-based access - and flexible security controls

## Affinity also provides a range of additional optional product integrations and features:

* Integrated property, personal, commercial and other Searches (GlobalX, InfoTrack, SAI Global)
* "Scan-to-matter" integration with Multi-function devices
* Client Portal Extranet access for Clients, Referrers and 3rd Parties
* Mobile Time Recording and Enquiries (Lawyers / Employees)
* Build time-sheets based on daily activity using mitimes
* Integrity Server – system health check and monitoring

# Appendix II - Upgrade with Confidence

The team at LexisNexis put a lot of effort into testing new releases and updates, under a range of scenarios, but it is difficult for us to check every option or environment that our clients may have. For most firms, Lexis Affinity is the lynchpin of their day to day operations and smooth, continuous operation is critical to their ability to service their client’s needs.

## Test Environment – Break the system before it breaks you

To minimise potential disruption to a firm’s critical business systems, you should have a test environment that replicates your existing network, allowing you to test changes to essential applications before releasing them in your live system.

Think about your bank and the number of changes they make to their network. They put each change through several rounds of testing, in different environments to ensure that everything works before making changes to their live systems and effecting your money.

If you have ever experienced issues as a result of an upgrade or applying a patch, you will understand the value that configuring a test environment can have in terms of lost revenue and system confidence.

## How we can help improve your upgrade success

Setting up a test environment is a straightforward process. It will take our consultants about half a day (4 hours) to install a test instance for you on a spare computer, or virtual machine that matches the other machines in your office. We will:

* Create a new “Test” database, using data from one of your overnight backups.
* Install the new Affinity update on the “Test” computer.
* Upgrade the database, to the new updated version.

We are happy to step you through this process as we go, to give you the skills to perform any future “Test” upgrades in the future without our assistance.

If this is something you would like to implement, please contact your Account Manager to arrange an Order Form.