



Proposal for ${client\_name}

${pro\_date}

${ss\_name}

${ss\_designation}  
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Mobile:  ${ss\_phone}

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# Executive Summary

LexisNexis is pleased to respond to a request from ${client\_name}with this proposal to solve the following challenges:

# Why choose Affinity?

Smart firms choose Affinity for many reasons, including:

* A single integrated platform for Document Management, Matter Management, Finance and Accounts, Billing, Workflow, Time Recording, Precedents, Reporting, CRM and more, enabling practice-wide efficiencies, lower software costs and ongoing maintenance.
* Developed here in Australia, Lexis Affinity™ is backed by a global organisation committed to the ongoing support and development of the platform.
* The leading practice management solution for the mid-law market and a proven application used by over 470 firms across the Asia-Pacific region.
* A refined, intuitive and flexible interface for both practitioners and supporting roles in your firm.
* Our implementations are professionally planned and managed, by our delivery team who carry over 40 years of experience delivering legal software solutions.
* Our Consulting, Training and Support teams are there to support your practice and work with you to achieve the business outcomes you need.
* Backed by LexisCare, your firm will have access to regular software updates, our online knowledge base, online training and help videos and more (see Appendix II for details).

# Solution Specifics

This proposal includes the following:

1. Affinity Server and Workstation software  
   Lexis Affinity with ${no\_users}concurrent user licenses. Professional Services to assist your team in configuring, implementing and using the solution. Ongoing online and remote technical support and maintenance, including software updates.
2. Oracle Database SoftwareThe Oracle database is an integral part of Affinity. This proposal includes provision for ${wording\_before\_users} ${wording\_after\_users}
3. ${client\_portal}  
   ${Client Portal will enable you to increase your efficiency and collaboration with clients and selected Third Parties while delivering premium service with confidence and security. Easily exchange documents with external users and reduce enquiries by allowing online access to the matter details they need.}
4. ${affinity\_mobile}  
   ${Affinity Mobile will enable you to increase your efficiency and productivity by securely giving your staff access to the contacts, matters and documents they need on the go.}
5. ${lexis\_empower}  
   ${Lexis emPower will make you more efficient by automating your legal document production and includes regular updates to precedents and court forms.}
6. ${lexisNexis\_ser\_lic\_req}  
   ${LexisNexis Searches integrates with GlobalX for all your property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements.}
7. ${lexisnexis\_sea\_infotrack}  
   ${LexisNexis Searches integrates with InfoTrack for all your property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements.}
8. Dye & Durham Integration  
   Affinity integrates with Dye & Durham Property for property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements.
9. PEXA Integration  
   Affinity integrates with PEXA for real-time online lodgement and settlement of property matters. Link and access your PEXA workspace from within your Affinity matters.
10. Macquarie Bank Integration  
    Affinity integrates with Macquarie Bank to boost your firms’ productivity, reduce costs and improve cash flow with an innovative payment, collection, receipting and reconciliation solution.
11. ${settlement\_adjuster}  
    ${Settlement Adjuster will help you to create new and adjust existing Settlement Sheets (NSW), Settlement Statements (QLD) and Statement of Adjustments (VIC) in a fast, efficient and accurate manner.}
12. mitimes Integration  
    mitimes enables easy, accurate and automated time-recording by connecting your Affinity database, exchange server and PBX to automatically record billable activities and present them for you to approve and post. mitimes is the best way to save time and stress while increasing your billable fees.
13. FeeSynergy Integration  
    Affinity integrates with FeeSynergy Collect to increase your cashflow, reduce your debtor days and automate your current processes, all while improving the service you provide. Plus, flexible monthly payment options, secure online payment gateway and comprehensive partner dashboard will make life easy for both you and your clients.
14. Fileman Integration  
    Affinity integrates with Fileman to enable cloud-based management of your archived matter files, including storage, retrieval and destruction. The unique single fee per matter approach means you can convert the cost of file management into a legitimate disbursement.
15. Softdocs InterConnect  
    Softdocs InterConnect allows for smooth integration between Softdocs precedent libraries and Affinity.  Your team can generate SoftDocs documents directly from the matter window in Lexis Affinity.  Matter and Contact data is available in your documents with no re-keying and HotDocs interview data can be pushed back into your Affinity database.

# Investment Summary for ${client\_name}

|  |  |
| --- | --- |
| Software Licenses and Optional Products | Price ${currency} |
| 1. Affinity Workstation licenses for ${nou} concurrent users | ${lexaffusrlic\_cost} |
| 1. Affinity Server licence | ${lexaffsl\_cost} |
| 1. Oracle Standard Edition Two for ${Oracle\_License\_Details} licenses | ${orclic\_cost} |
| 1. Lexis emPower modules for ${emPower\_users} users: | ${empower\_cost} |
| * ${module1} |  |
| * ${module2} |  |
| * ${module3} |  |
| * ${module4} |  |
| * ${module5} |  |
| * ${module6} |  |
| * ${module7} |  |
| * ${module8} |  |
| * ${module9} |  |
| * ${module10} |  |
| * ${module11} |  |
| * ${module12} |  |
| * ${module13} |  |
| * ${module14} |  |
| 1. Affinity Client Portal | ${clportal\_cost} |
| 1. Affinity Mobile for up to Mobile\_users active users. | ${affimobl\_cost} |
| 1. Lexis Settlement Adjuster for SA\_users users | ${lexaffsetlcal\_cost} |
| 1. SoftDocs InterConnect | ${softinter\_cost} |
| 1. 2 Way Microsoft Exchange Integration | ${msexchinterg\_cost} |
| Software Subtotal | ${Software\_SubTotal} |
| Professional Services |  |
| 1. Data migration (see specification appended below) | ${dm\_cost} |
| 1. Staff training as described in the Important Notes section | ${implserv\_cost} |
| 1. Post implementation review and assistance – (Estimate ${ReviewDays} days) | ${postimpl\_cost} |
| 1. Allowance for travel - (Estimate No\_of\_trips trips) | ${allotrvl\_cost} |
| 1. Additional consulting: | ${impltran\_cost} |
| * Additional Precedent configuration |  |
| 1. Scoping study to assess the requirements to. | ${scopstdy\_cost} |
| Professional Services Subtotal | ${ServicesSubTotal} |
| ${UpfrontInvestment} | ${TotalCostExcl} |
| GST Payable at ${GST\_percentage}% | ${GSTonTotal} |
| Up-front Investment GST inclusive | ${TotalCostIncGST} |

**Continues on next page**

|  |  |
| --- | --- |
| Ongoing Annual Maintenance Fees |  |
| 1. Annual Lexis Care for Affinity Workstations and Server | ${aalc\_cost} |
| 1. Annual Maintenance for Oracle | ${annorcl\_cost} |
| 1. Annual Lexis Care for emPower | ${annempower\_cost} |
| 1. Annual Lexis Care for Client Portal | ${annclipor\_cost} |
| 1. Annual Lexis Care for Affinity Mobile | ${annaffmob\_cost} |
| 1. Annual Lexis Care for Settlement Adjuster | ${annsetlcalc\_cost} |
| 1. Annual Lexis Care for SoftDocs InterConnect | ${annsoftint\_cost} |
| ${TotalAnnualMaintenanceFees} | ${CareTotalExGST} |
| GST Payable at ${GST\_percentage}% | ${CareGST} |
| Total Annual Maintenance – GST Inclusive | ${CareTotalIncGST} |

Notes on Investment Summary

1. I have included a conditional discount. Final approval by our Finance Director is required. The offer includes:
   1. One-off costs discounted by ${disc\_subtotal}%
   2. Ongoing support and maintenance costs discounted by ${disc\_maint}%
   3. Annual subscription fees discounted by ${disc\_subs}%
   4. A payment plan over ${term\_month} to minimise cash flow impact on you
   5. ${Upfront payment of Software and Professional Services costs}
2. Costs after ${term\_month} are for LexisCare Maintenance only. The monthly outlay therefore is reduced significantly. Please see “Repayments” for further details.
3. All prices exclude GST. GST shown separately.
4. Please note, the pricing in this proposal is valid until 5:00pm (AEST) on ${proposal\_expiry\_date}

# Optional repayments terms

We understand that an upfront payment option can restrict cash flow therefore LexisNexis are happy to offer ${client\_name}the flexibility and convenience of amortising the upfront costs over ${term\_month}.

The repayment amounts are equivalent to **$${per\_month\_cost}**per user per month over the fixed term.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Initial Deposit** | **Software + Services** | **LexisCare** |
| Year 1 | ${initial\_pay} | ${month12} | ${lexis12\_month} |
| Year 2 | 0 | ${month24} | ${lexis24\_month} |
| Year 3 | 0 | ${month36} | ${lexis36\_month} |
| Year 4 | 0 | ${month48} | ${lexis48\_month} |
| Year 5 | 0 | ${month60} | ${lexis60\_month} |
| **Total** | **${initial\_pay}** | **${monthTotal}** | **${lexisMonthTotal}** |
| *Indicative costs below after ${term\_month}.*  *Please note a significant reduction for Affinity as the one-off costs have amortised* | | | |
| Ongoing annual LexisCare | | | ${Year\_LexisCareOnly} |

Notes on Repayment Terms

1. Costing based discounts and terms detailed in Investment Summary and “Important Notes”
2. Initial Deposit payable on order acceptance
3. Software & Services costs payable by monthly direct debit commencing on delivery of confirmed project plan. Includes Software, installation, data migration, training, consulting and project management
4. LexisCare annual support & maintenance payable by monthly direct debit commencing on date of live operation (“Go-Live”)
5. LexisCare costs will increase 5% year on year to offset cost changes in providing the service
6. A complete schedule of monthly repayments will be provided on acceptance of your order

# Assumptions and Exclusions

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

1. Lexis 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. Affinity must be installed on a dedicated server (whether on-premises, or remotely (Cloud) hosted) to ensure optimal performance. The Affinity Server requirements are set out in the Lexis Affinity OSCR – a copy of which is appended to this proposal
3. Affinity will be provided in its standard form without any special customisations to meet specific client requirements.
4. ${client\_name}will assign a dedicated project manager and will form a project team to work with the LexisNexis team to ensure effective planning and execution of agreed plans.
5. Any references to schedules, timetables or timing are indicative and provided as an estimate only. The timing around your project will depend on various factors including but not limited to your operating environment. Accordingly, we have provided an estimate which is based upon our previous experience in standard, greenfield environments and the information provided by you to date.
6. ${I have included an allowance for data migration from CURRENT\_PMS, including an essential trial migration for validation and testing.}
7. ${I have included training and education via Lexis Learning, our online learning platform which gives your team full access to all our standard courses, to complete at your own pace, in your own time and visibility of learner’s progress through the programs available.}
8. ${I have included face to face training from our specialist Consulting Team which can be conducted in person or remotely. Courses can be tailored to the needs of your staff.}
9. ${I have included a tailored package of learning and education options, utilising Lexis Learning, our online learning platform to provide all our standard training for your team, supplemented by face to face Consulting support and configuration assistance (which can be delivered remotely or in person).}
10. The scope of training is described in the Important Notes section below.
11. Standard Precedents as shown below will be provided during the implementation and will be customized to include your logo, letter head and letter footer.

* File Attendance Note
* General Letter
* Client Letter
* Fax Cover Sheet

1. ${Additional consulting has been included in this Investment Summary for more complex precedents to be created by LexisNexis, in addition to those above.}
2. ${Additional consulting has been included in this Investment Summary for simple custom workflows to be created by LexisNexis.}
3. We will provide copies of our Standard Bill Templates as part of this proposal. Any variation to the standard bill templates is considered a customisation and will be quoted separately.
4. We will integrate LexisNexis Searches for your chosen Provider(s). LexisNexis Searches provides access to transactional searches from within Lexis Affinity and we will provide weekly invoices for all searches ordered during the preceding week. Your Lexis Affinity installation includes a simple utility tool to assist your team in reconciling searches transactions.
5. ${The SoftDocs Interconnect feature requires a current SoftDocs subscription. Please contact SoftDocs to arrange a quote to match your requirements.}

# Important Notes

Payment Terms

All systems, software and services are supplied in accordance with conditions set out in the End User Contract and Order Form, a copy of which has been provided.

Whilst the fees quoted in the Investment Summary are valid until ${proposal\_expiry\_date}, prices are subject to change without notice.

A non-refundable, upfront deposit amount of ${deposit\_amount\_exGST}plus GST will be payable by you on acceptance of the order by us, and the remaining balance payable via direct debit, as follows:

### ${Plan\_Months}Payment Plan

Except for the Deposit (which must be paid as stipulated above), you must pay us the remaining balance, via direct debit, as follows:

(a) License and Professional Services Fee to be paid, via equal monthly instalments, over ${Plan\_Months}commencing 90 days from the Project Plan Delivery Date; and

(b) LexisCare Maintenance Fee to be paid, via monthly instalments, over the First Maintenance Term commencing on the Go Live Milestone.

### Upfront Payment Term

You must pay us the total cost of the License and Professional Services Fee, including any applicable LexisCare Maintenance Fee, within 30 days of the date of our invoice (to be issued upon acceptance by us of the Order Form).

Dedicated Affinity Server

Lexis Affinity requires its own server. This server is dedicated to Affinity and Oracle – no other applications may run on this server. Your Affinity Server may be hosted on-premises, or in a suitable remote / cloud hosted service. The Affinity Server requirements are set out in the Lexis Affinity Operating System Configuration Requirements – a copy of which is appended to this proposal.

If you have any queries regarding the required server configuration please contact me direct and I will arrange a consultation with our Technical Services Group.

Affinity Licences and Installation

${client\_name}will be provided with licenses to operate the Affinity Server and the requisite number of user Workstations, in accordance with the Affinity End User Contract. You will be provided with the version of Affinity currently on general release. If a newer version of Affinity software is released during your implementation, your Project Manager will discuss upgrade options with you.

Oracle Licences and Installation

Oracle is provided in accordance with the applicable Oracle licence agreement, a copy of which appears in the End User Contract. It is supplied as an application specific, runtime version of the world-leading relational database management system.

Oracle licence fees and maintenance fees are set by Oracle Corporation. The fee model is based upon either a “per named user” or a “per CPU socket” basis. Unless otherwise agreed in writing by Oracle and LexisNexis, this investment summary provides for licence fees covering only the number of named users, or CPU sockets described.

Should the practice seek to change its configuration, purchase new equipment, add CPU sockets or CPUs or increase the relevant number of named users then additional fees will be payable to Oracle. You must obtain written confirmation from LexisNexis prior to making any such changes to your system configuration.

Installation of Oracle or re-installation in the event of a system re-load requires suitable technical skills. LexisNexis provides this assistance on a professional services basis.

Business Continuity Planning

It is the client’s responsibility to ensure that all data, programmes and system files are backed up at regular intervals so as to avoid the loss of data if a system failure or other problem occurs. It is also the responsibility of the firm to ensure that the backup can be used to quickly restore the system after a failure. LexisNexis are happy to offer a Backup Proving service, if you require assistance in this regard. Please discuss this with your Account Manager.

Travel Time, Travel Costs and Out-of-Pocket Expenses

${Travel time, travel costs and out-of-pocket expenses are billed separately on an actual basis and using LexisNexis standard consulting rates.}

${Travel time has been included in this investment summary. Any travel costs and out-of-pocket expenses are billed separately on an actual basis.}

Project Management

The Affinity implementation project will be conducted according to an agreed project plan. A server and network infrastructure that will accommodate the expected number of users and data volumes must be in place prior to the commencement of the implementation.

LexisNexis will assign a dedicated project manager to ensure that the activities of LexisNexis’ team members are coordinated. It will be necessary for ${client\_name}to assign a person who will be the firm’s product champion and who will ensure that the involvement of the team at ${client\_name}is coordinated effectively. Timely response to questions and cooperation between these two people will be vital to the successful completion of the project.

Data Migration Assistance

This investment summary includes a data migration from your current system into Lexis Affinity. Please refer to appendix II for Data Migration Scope.

The Data Migration Assistance fee quoted is an estimate only that is subject to confirmation of data volumes, availability and quality for one (1) trial and one (1) final migration of one (1) entity only.

A successful migration requires a review of your data and completion of cleansing activities as instructed by the LexisNexis project team. This task can be completed in a week if you dedicate resources to the task but will take longer if completed on an ad-hoc basis. Once LexisNexis receives the data you have prepared, a trial migration will be conducted by LexisNexis for you in the project proof of concept phase and tested by you. This is followed by a final data migration by LexisNexis immediately prior to you going live with Lexis Affinity.

Installation of the Affinity server will need to be completed three (3) weeks prior to the training commencement date detailed above.

Consulting Hours Allowance

The consulting hours specified are an allowance only for implementation of the software licences described in the Lexis® Affinity Investment Summary, based on a standard set of files, formats and reconciled accounts for take-up and our experience of implementing LexisNexis software in a firm that is well prepared and organised. Actual resource requirements will be confirmed in an agreed project plan.

Modifications to this Investment Summary or Investment Summary or additional consulting time, if required, will be billed at LexisNexis consulting rates. Preferential consulting rates are available to Lexis Care subscribers. For workload and cost estimates, one day is equal to ${HoursPerDay}hours.

All work is scheduled by agreement and signed off by the client. Cancellation of scheduled consulting work or training courses by the client on less than fourteen (14) days’ notice will incur a 100% fee if LexisNexis cannot re-assign the staff involved to other client assignments. Changes to the Implementation Plan may require additional Project Management and/or consulting time related to rescheduling staff and producing a new Project Plan.

Implementation Training and Education

LexisNexis will support your team with a range of Learning and Training resources, to help your team learn how to configure and operate Affinity successfully. Your education programme and the timing of sessions will be confirmed with you at our Initial Planning Meeting.

### Self-Paced Online Learning

Our Consultants will work with your Project Team to ensure the right training is assigned to your staff based on the requirements of their role. Each staff member will be enrolled in Lexis Learning, our online learning platform. End-Users are required to complete the applicable courses prior to the agreed dates.

Each staff member will require access to a computer with internet access and a speaker or headphone capability. Each staff member will be enrolled in the Lexis Affinity End-User training course and will be required to complete the applicable modules in the course prior to any on-site face to face training.

The course covers use of:

|  |  |
| --- | --- |
| * Desktop * Phonebook - Intro * Phonebook - Conflict Checker * Phonebook - Creating New * Phonebook - Working With * Clients – Creating * Clients - Working With * Matters – Creating | * Matters - Working With * Matters - Closing and Archiving * Trust transit register * Cheque Requisitions * Fees / Time Recording * Billing * Diary * Document Management |

Ongoing access to Lexis Learning will be provided while you maintain a current LexisCare subscription. Refer to LexisCare or your proposal for course details.

### Instructor-led Remote, or Onsite Face to Face Training

«Name» will be provided with an electronic copy of the appropriate training material. Most materials are also available from the Lexis Care Service Centre for ease of access. ${client\_name}is responsible for printing the material for the training sessions. All costs associated with the preparation of the material are the responsibility of the firm.

Training of staff will be conducted remotely via Microsoft Teams, or equivalent software. Please discuss with your Project Manager if your firm’s IT policies conflict with use of MS Teams.

Some courses may be delivered on-site in a classroom environment at the offices of ${client\_name}at ${client\_address}. ${client\_name}must provide an adequate training room with one computer per attendee, and a data projector.

Subject to confirmation of a Training Plan, the scope of the training encompasses:

|  |  |  |  |
| --- | --- | --- | --- |
| **Course Title** | **Delivery Method** | **Course Duration** | **Participants (Max per session)** |
| Affinity Essentials | ${EssentialsMethod} | 1 day | 6 |
| Affinity Operations | ${OperationsMethod} | 2 days | 6 |
| Affinity Administration | ${AdminMethod} | 1 day | 6 |
| Business Process Automation (BPA) Essentials | ${BPAEssentialsMethod} | 0.5 day | 6 |
| DataForms & Precedents | ${DataPrecMethod} | 2 days | 6 |
| DataForms & Precedents (PhoneBook only) | ${DataPrecPhoneBookMethod} | 0.5 day | 6 |
| Introduction to Workflow (course and workshop) | ${IntroWorkflowMethod} | 2 days | 6 |
| Basic Scripting (course and workshop) | ${ScriptingMethod} | 2 days | 2 |
| End-User Training (Professionals & Support Staff accounting functions) | ${EUTProfMethod} | 0.5 day | 6 |
| End-User Training (BPA functions) | ${EUTBPAMethod} | 0.5 day | 6 |
| Report Writing Course | ${ReportMethod} | 3 days | 2 |
| Train-the-trainer training in the use of the professionals and support staff Accounting functions | ${TrainTrainerProfMethod} | 0.5 day | 2 |
| Train-the-trainer training in the use of the professionals and support staff BPA functions | ${TrainTrainerBPAMethod} | 0.5 day | 2 |
| Review training material and content with client | ${TrainingReviewMethod} | 1 day | n/a |

Notes

1. Train-the-trainer training consists of a LexisNexis consultant conducting a one (1) day course, then sits in on a one (1) day course your trainer conducts.
2. Training plan, including scheduling and confirmation of delivery method(s) will be confirmed at the initial planning meeting

Scoping Assessment

The scoping assessment will involve analysis of the requirements of the practice and preparation of a specification and quotation. For certain types of tasks, it is necessary to do some or all of the work in order to arrive at a final quotation. For some small projects, if the agreed scope of work can be completed within the time allowed for the scoping assessment then no additional fee will be applicable otherwise a quotation will be provided.

LexisNexis Online Research

Access to the Online Research platform and Lexis Advance is subject to the terms and conditions outlined in the Affinity EUC and order form.

emPower Forms and Precedents

emPower Forms and Precedents are automated legal templates that combine current content with easy-to-use technology to allow users to complete documents efficiently, reliably and fast.

SoftDocs InterConnect

Lexis Affinity provides integration with SoftDocs document automation and precedents through the use of HotDocs technology (www.softdocs.com.au). SoftDocs InterConnect enables data exchange between Lexis Affinity and SoftDocs. SoftDocs InterConnect is configured based on the precedent libraries used by your firm.

The version of HotDocs being used will have to adhere to the software license conditions supplied by SoftDocs along with their operating system requirements. Of note:

* You should confirm the compatibility of your firm’s Microsoft Office version with the version(s) of HotDocs software required by SoftDocs
* You are bound by the Enterprise License sold to you by SoftDocs and any software upgrades required need to be in accordance with that Enterprise License.
* For firms upgrading versions of HotDocs a charge may be incurred by SoftDocs in line with their Enterprise License.

For a detailed description of technical requirements please review the document Lexis Affinity Operating System Configuration Requirements (OSCR).

What is Out of Scope?

* 2-way Microsoft Exchange Integration
* Configuration of General Ledger drivers
* Fee templates (other than those stated)
* Foreign currency
* Sundry interfaces (Monitor, BillBack etc)
* Software changes to meet specific (unforeseen) client needs
* Migration of existing documents and precedents to Lexis Affinity
* Mapping or migration of ancillary systems processes to Lexis Affinity processes

# Appendix I – Data Migration Specification

${Append\_Data\_Migration\_Specification}

${Following our discussions, it has been agreed that client\_name do not require data migration. This proposal includes a provision of additional consulting time, to support the manual take-up of data, as part of the go-live process for Lexis Affinity.}

# Appendix II - Lexis Affinity product summary

Everything you need to run your entire practice in a single, unified solution

|  |  |  |  |
| --- | --- | --- | --- |
|  | Matter Management  Manage your caseload more effectively with everything you need on one place. Keep track of matter progress, documents, contacts and financials. Update facts of the matter and key dates using DataForms. Record time, process transactions and manage billing. |  | Document Management  Centralised document management for your entire firm across matters, contacts and clients. Find and update documents quickly with full-text searching. Drag-and-drop capability from Windows and Outlook make filing easy. |
|  | Accounting & Financials  A comprehensive Accounting solution including Office and Trust Accounting, Investments and Controlled Monies, General Ledger, Budgets, Bank Reconciliation, Creditor management, Cost & Disbursement recovery and more. |  | Billing and Invoicing  Organise and manage your routine Billing functions with less effort and more control. Flexible bill template can be tailored to your firm with convenient eBilling and collection options. Easily set up auto-generation of draft bills for review and approval using system rules. |
|  | Precedents Management & DataForms  Manage your firms’ entire precedent library and ensure your staff are using the right documents. Use LexisNexis standard forms and precedents or build your own templates. Automate document drafting using custom DataForms (with no programming) and re-use data to automate correspondence (inc. email precedents). |  | Flexible Workflow  Model and map your legal and administration processes and turn them into reusable workflows. Prompt for information when and where it's needed and automate the delivery of common tasks, reduce unnecessary work and improve the quality of your business outputs. |
|  | Diary & Scheduling  Integrate Affinity's centralised calendar with Microsoft Exchange and Outlook to enable Key Date tracking and Matter-based Diary integration. Combine your ad hoc daily tasks with workflow to create simple Task checklists. |  | Time Keeping  Keep on top of Time Recording with flexible time recording options to suit different working styles including Record-as-you-work timer, 'Traditional' fee sheet, Scale Costs, Flexible rates and Budget tracking. |
|  | Powerful Reporting  Analyse performance across your practice with our suite of Reporting options, both financial and performance based, including dashboards and over 90 standard reports with automated run-time scheduling and email distribution, filters and customisation options. |  | Safe Custody  Reduce the cost and effort of managing your Safe Custody documents, including preview of electronic copies for fast and easy access. Safe Custody records can be linked to Contacts, Clients and Matters making them easy to manage with simple archiving options available. |
|  | Microsoft Office Integration  Simplify your daily work by accessing relevant parts of Affinity from within the Office applications you spend time using. Drag-and-drop filing, auto-save from Word, Excel and PDF, easy attachments with Outlook and sync Calendars and Tasks with MS Exchange. |  | Integrated Legal Research  Browse world-class legal research content online or kick-start your research from your matter. Link content and articles to matters for easy reference. Maintain your internal research library in Affinity. |
|  | CRM & Marketing  Understand and analyse your market with Affinity’s flexible Contact and Relationship Management functions. Energise your business development and marketing activities by leveraging the flexibility of custom data forms and Affinity’s powerful filter and search tools. |  | Security & Access Controls  Keep control over Affinity with Role-based and Team-based access - and flexible security controls. |

Optional extras from LexisNexis to help you make the most of Lexis Affinity

LexisNexis Searches - Integrated property, personal, commercial and other Searches (GlobalX, InfoTrack, Dye & Durham)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Affinity Client Portal  Client Portal will enable you to increase your efficiency and collaboration with clients while delivering premium service with confidence and security. Easily exchange documents with clients and reduce enquiries by allowing online access to the matter details they need. | [Image result for castle icon](https://www.google.com/url?sa=i&url=https://pngtree.com/free-png-vectors/castle-icon-vector&psig=AOvVaw1JBmWlqJau7yOh_sOOQyeS&ust=1584597338356000&source=images&cd=vfe&ved=0CAIQjRxqFwoTCLi87KCro-gCFQAAAAAdAAAAABAP) | Integrity Server  Integrity Server will monitor and manage the performance and usage of Lexis Affinity, provide proactive support with automated service notifications and easy maintenance and system upgrades. |

Lexis Affinity integrates with a range of select providers, giving you   
easy access to the business services you need

|  |  |  |  |
| --- | --- | --- | --- |
| [Logo](https://feesynergy.com.au/) | Debtor Management  Lexis Affinity integration with FeeSynergy to increase your cashflow, reduce your debtor days and automate your current processes, all while improving the service you provide. Plus, flexible monthly payment options, secure online payment gateway and comprehensive partner dashboard will make life easy for both you and your clients. |  | Cloud-Based File Storage  Lexis Affinity integration with Fileman to enable cloud-based management of your archived matter files, including storage, retrieval and destruction. The unique single fee per matter approach means you can convert the cost of file management into a legitimate disbursement. |
|  | Integrated Searches  LexisNexis Searches integration with GlobalX for all your property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements. | [InfoTrack Logo](https://www.infotrack.com.au/) | Integrated Searches  LexisNexis Searches integration with InfoTrack for all your property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements. |
| Image result for macquarie bank | Banking & Payments  Lexis Affinity integration with Macquarie Bank will boost your firms’ productivity, reduce costs and improve cash flow with an innovative payment, collection, receipting and reconciliation solution. |  | eSettlements  Lexis Affinity integration with PEXA for real-time online lodgement and settlement of property matters. Link and access your PEXA workspace from within your Affinity matters. |
|  | Automated Time Recording  mitimes enables easy, accurate and automated time-recording by connecting your Affinity database, exchange server and PBX to automatically record billable activities and present them for you to approve and post. mitimes is the best way to save time and stress while increasing your billable fees. | [https://www.saiglobal.com/UX/custom/homev2/images/SAI_Global_logo_grey.png](https://www.saiglobal.com/) | Integrated Searches  Lexis Affinity integration with SAI Global[[1]](#footnote-2) for all your property, business and consumer regulatory information. Order searches from within matters to avoid re-keying matter details with automated saving of documents and posting of disbursements. |
| MULTI-FUNCTION DEVICES | MFD Integration  Integrated scan-to-matter capabilities via Canon, Kyocera, Konica Minolta, Fujixerox, Sharp, Toshiba and more. |

# Appendix III – LexisCare, make the most of your investment

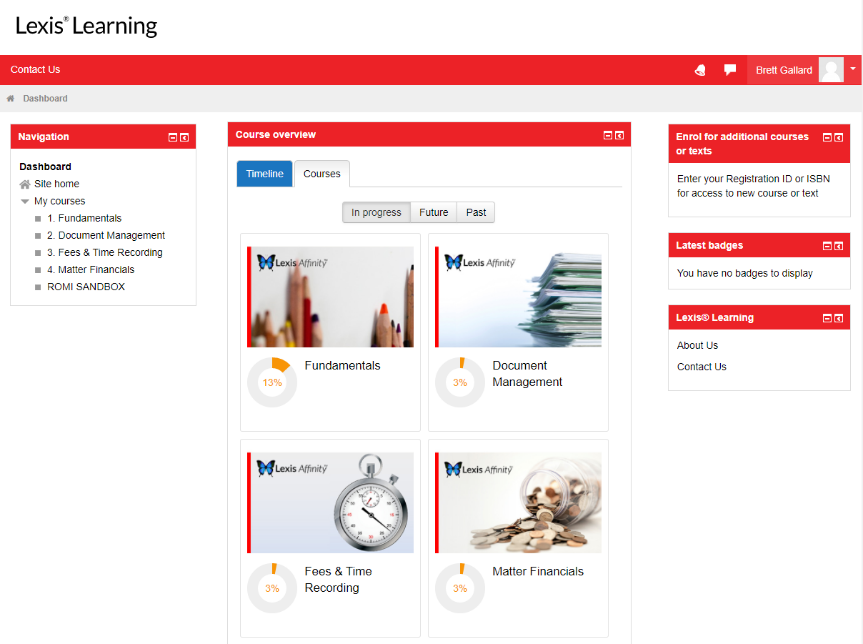
LexisCare includes much more than just support when you need it

From software updates and learning how to use new Affinity features, to upskilling new starters and ensuring your firm is using best practice, there are many benefits to having a current LexisCare subscription.

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|  | Regular Affinity software updates  Lexis Affinity is updated twice a year with significant enhancements, useability improvements and the inclusion of powerful new features. We also introduce integrations to select third party providers to give you access to innovative services from within Affinity. |  | LexisCare Knowledge Base  The LexisCare Knowledge Base is a comprehensive resource available 24x7, containing practical help on everything from basic configuration and step-by-step instructions for common activities to guidance on performing more advanced operations. |
|  | Help, when you need it  Lexis Affinity Helpline is there to assist trained operators with everything from performing common tasks, to advice on using more advanced features and resolving business impacting issues as quickly as possible. You also have the flexibility of calling us directly, or logging (and tracking) support requests online via LexisCare. |  | Complimentary Live & On-demand Webinars  LexisCare members can register to attend our regular schedule of online webinars run by our specialist Consulting Team on a variety of helpful topics, plus access to our library of recorded webinars and other video content now available within LexisCare. |
|  | Discounted Consulting rates  LexisCare members receive discounted hourly rates for a range of services our Consulting Team provide including consulting services, training sessions and Affinity HealthChecks. |  | Enhancements & Bug fixes  Every Affinity release includes over 100 enhancements and bug fixes requested by firms to improve their day-to-day experience using Lexis Affinity. |
|  | Access to User Group events and the Affinity Matters newsletter  LexisCare members have access to Affinity User Groups and the quarterly Affinity Matters newsletter which are filled with information on the latest developments in Affinity and the industry, plus tips on getting the most from your investment. |  | Opportunities to participate in roadmap development  Customer feedback is important to the Lexis Affinity team and we periodically reach out to LexisCare members to validate our product roadmap and provide input that shapes the future of Affinity. |
|  | Access to Lexis Learning online education  Lexis Learning offers a range of courses to help Lawyers and Support Staff familiarise themselves with the functions of Affinity – and keep up to date with new developments |  |  |
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# Appendix IV – Lexis Learning online education platform

Comprehensive learning at your own pace, in your own time.

Lexis Learning is our brand-new online learning platform, brought to you by the experts in the Affinity Consulting Team. Our entire portfolio of standard courses is available via a user-friendly interface, giving you the freedom to learn and upskill in your own time, at your own pace.

Our Consultants will work with your Project Team to ensure the right training is assigned to your staff based on the requirements of their role and will work with you throughout your implementation to ensure your team is trained and ready to go from day one.

Even better, you retain access to Lexis Learning after your ‘go live’ so you’ll have access to the expertise our of Consulting Team any time you need a refresher.

Standard Lexis Affinity Training Courses

Matter   
Financials

If your role involves the financial management of matters including cheque requisitions and requests, billing and managing matter ledgers this course goes into detail on the skills you’ll need.

Affinity   
Fundamentals

Perfect for new starters, this course gives you all the Affinity basics including an overview of the interface, Phonebook, Contacts, Clients, Matters, Diary and Events and how to use common functions.

Document Management

If your role involves creating and/or managing documents, then this course has everything you need to know from generating documents from matter-based precedents, saving them against matters, emailing them to clients and more.

Fees & Time   
Recording

If you record time, utilise the fee-sheet, are involved in matter financials or produce client bills, this course will give you the knowledge and skills you need.

Matter  
Archiving

This course outlines best practice when reviewing and closing matters, how to archive matters individually and in bulk, managing archives and archive locations, and requesting archive file retrieval.

Finance &   
Accounts

This course is invaluable for your accounts team and covers everything from trust receipts, cheques, journals and transit registers, petty cash and transfer fees disbursements, creditors, general ledger, bank reconciliation and much more.

System   
Administration

Essential for System Administrators, this course gives you all the knowledge you need to effectively manage your Affinity system including employee setup and configuration, matter and document management setup, finance and accounts setup and more.

Safe   
Custody

This course gives users a good understanding of the safe custody types that can be created and used, how to review edit and update existing packets, how to manage, add and move packets, and safe custody reporting.

# Appendix V - Upgrade with Confidence

LexisNexis can help you ensure continuity of your business

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.

Build a Test Environment to protect your firm

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 LexisNexis 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.*

1. Now owned by Dye & Durham [↑](#footnote-ref-2)