Section 1 - IT Systems for Solicitors

Section 1 - Supplier Details	Supplier response:
Company name	Harvest Software
Trade or product name	Harvest Law
CRO Reg. No.	165615
Address	Unit 37, Johnstown Business Park, Waterford
Contact person	Michelle Droney / Sean Rogers
Telephone	051 872111
Email	michelle@harvestsoftware.ie
How long in business	20 years
How many solicitors firms currently use your service?	600+
Target firm size (in number of fee-earners)	1 – 10

Reference firms. Please list names, addresses and contact person of five firms who use your product or serice.

Note: This information is for reference by the compilers of the report. The names of the referenced firms will not be published as part of the report but may be given to others with the consent of the firm concerned.

- 1   Five reference firms names supplied
- 2   Five reference firms names supplied
- 3   Five reference firms names supplied
- 4   Five reference firms names supplied
- 5   Five reference firms names supplied

Summary of Products/Service offered. Note: This is a summary for categorisation only.

- 1	Solicitors accounts system	Yes
- 2	Time recording	Yes
- 3	Full practice management	No
- 4	Case/workflow management	No
- 5	Document management	No
- 6	Digital dictation	No
- 7	Knowledge/library management	No
- 8	Do you supply hardware (PC's, printers etc?	No
- 9	General systems & network support, including word processing, email and internet access & security.	No
- 10	Telephone systems	No
- 11	Payroll	No
- 12	Consultancy (unrelated to products you supply)	No

Section 2 - Practice Managment Systems & Solicitors Accounts Systems - details

Law Society of Ireland

Section 2 - Product Details	Supplier response:
A **Client data:**	
- 1 Full Contact Details For Client Recorded?	a) Included in standard package
- 2 Multiple Contacts For Same Client Recorded?	a) Included in standard package
- 3 Client Type Designation? (Ltd Co, Male/Female, Club Etc)	a) Included in standard package
- 4 Introduction Source Recorded?	d) Not available
- 5 Anti Money Laundering Compliance Check?	d) Not available
- 6 Antimoney Laundering Data (To Compliance Standard) Stored?	d) Not available
- 7 Record Terms Of Engagement For Client?	a) Included in standard package
- 8 Last Contact Date Automatically Stored?	d) Not available
B **Risk management**	
- 1 Conflict Of Interest Checking?	d) Not available
- 2 Client Identification Due Diligence Checking?	d) Not available
- 3 Section 68 Letter Check?	d) Not available
- 4 Undertakings Register?	a) Included in standard package
- 5 Critical Dates Register?	a) Included in standard package
- 6 Critical Dates Reminder?	a) Included in standard package
C **Access security:**	
- 1 All access restricted to authorised persons?	a) Included in standard package
- 2 All actions traceable to specific operator?	d) Not available
- 3 Can a full audit trail of all actions taken on the system be reviewed?	a) Included in standard package
D **Matter data:**	
- 1 Automatically generate S.68 letter?	d) Not available
- 2 Select & record work type?	a) Included in standard package
- 3 Record terms of engagement for each matter?	a) Included in standard package
- 4 Time recording?	a) Included in standard package
- 5 Record fee earner dealing?	a) Included in standard package
- 6 Record control partner?	a) Included in standard package

- 7	Record anticipated fees or fee quote?	a) Included in standard package

E Matter Accounting

- 1	Client/Matter accounting complying with regulations?	a) Included in standard package
- 2	Nominal ledger?	a) Included in standard package
- 3	Full audit trail?	a) Included in standard package
- 4	Profit & loss account?	a) Included in standard package
- 5	Bank reconciliation automatic?	d) Not available
- 6	Bank reconciliation manual?	a) Included in standard package
- 7	Can bank reconciliations be reversed / reprinted?	a) Included in standard package
- 8	Retention tax handling?	a) Included in standard package
- 9	Third party payment returns?	a) Included in standard package
- 10	Purchase ledger?	a) Included in standard package
- 11	Outlay accounting by matter?	a) Included in standard package
- 12	Outlay accrual by matter?	a) Included in standard package
- 13	Invoicing, including VAT?	a) Included in standard package
- 14	Invoice printing?	a) Included in standard package
- 15	VAT reporting and VAT3 preparation?	a) Included in standard package
- 16	Online cheque requisition/posting?	a) Included in standard package
- 17	Can cheque requisitions be searched historically?	a) Included in standard package
- 18	Cheque printing?	a) Included in standard package
- 19	Online bill drafting?	a) Included in standard package
- 20	Statements showing unpaid invoices?	a) Included in standard package
- 21	Archival and retrieval of completed matters and documents?	a) Included in standard package
- 22	Wills & deeds register?	d) Not available

F Reports

- 1	Aged debt analysis?	a) Included in standard package
- 2	Work in Progress time & outlay?	a) Included in standard package
- 3	Client account balances?	a) Included in standard package
- 4	Undertakings outstanding?	a) Included in standard package

- 5	Office/outlay account balances?	a) Included in standard package
- 6	Inactive/dormant matters?	a) Included in standard package
- 7	Client listing?	a) Included in standard package
- 8	Auto output of reports to spreadsheet?	a) Included in standard package
- 9	Peer review diary report?	a) Included in standard package
- 10	Case action diary/reminder?	a) Included in standard package
- 11	Ability to restrict access to some reports?	a) Included in standard package
G	**System Integrity & support**	
- 1	Automatic backup or mirroring?	a) Included in standard package
- 2	Rollback facility? (in event of system crash)	a) Included in standard package
- 3	Remote online support?	a) Included in standard package
- 4	On site support?	b) Optional at cost
H	**Case management / work flow**	
- 1	Receive and store incoming & outgoing emails?	Please Select:
- 2	Integrate with standard email package. If so, which one ?	Please Select:
- 3	Produce standard letters and emails from stored client & matter data?	Please Select:
- 4	Produce documents from stored client/matter data and precedents?	Please Select:
- 5	Have workflow facility enabling the automatic or semi automatic progression of	Please Select:
- 6	If you have work flow / case management, does it allow for mandatory steps,	Please Select:
- 7	Ability to store different matter information for different case types?	Please Select:
- 8	Do you have the ability to schedule a call, meeting or task through work flow?	Please Select:
- 9	Is all data stored in one data base?	Please Select:
I	**Document management**	
- 1	Organised scanning of incoming documents?	Please Select:
- 2	Document management indexing and storage?	Please Select:
- 3	Image scanning and indexing?	Please Select:
- 4	OCR facility?	Please Select:
- 5	Full document and email (inc attachments) text search?	Please Select:
- 6	Do you have a "brief builder" / document building facility?	Please Select:
- 7	Can you output documents to PDF format?	Please Select:
- 8	Do you have version control on documents?	Please Select:
J	**Precedents**	
- 1	Are precedents included?	Please Select:
- 2	How many are included?	Please Select:

- 3	Do you sell precedents separately?		Please Select:
K	**External Access**		Please Select:
- 1	Secure external access by clients?		Please Select:
- 2	Secure external access by PDA / Blackberry / iPhone?		Please Select:
- 3	Secure external access by remote home or second office user?		Please Select:
- 4	Secure external access by your IT support supplier?		Please Select: