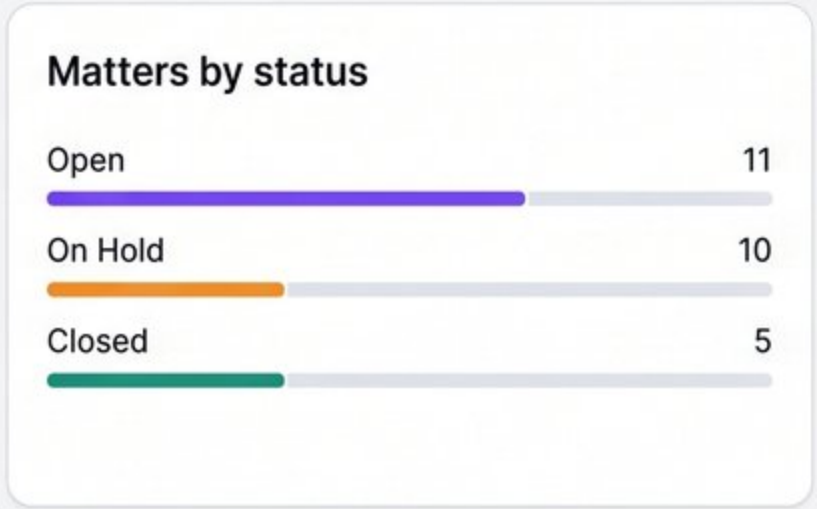
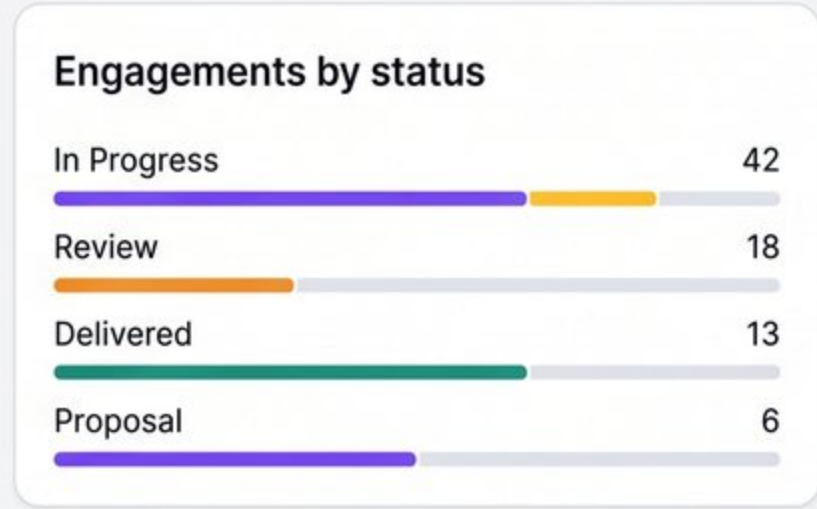
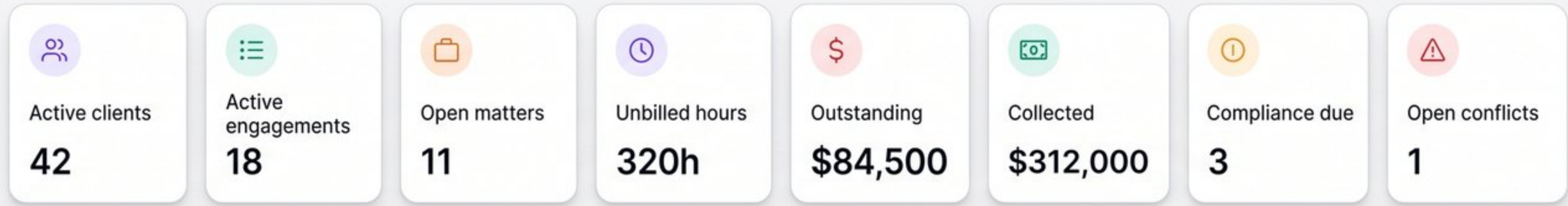


Practice overview

One governed view of clients, engagements, matters, time and billing across your firm.



Jump to

- Dashboard
- Clients
- Engagements
- Matters
- Open conflicts
- Practice Areas
- Time
- Invoices
- Compliance
- Conflict Checks
- Documents
- Analytics

- Dashboard
- Clients
- Engagements
- Matters
- Time
- Invoices
- Compliance
- Conflict Checks
- Documents
- Practice Areas
- Analytics

Clients

Every person or organization your firm serves.

+ New client

Search clients...

Status filter

42 clients						
☐	Name	Type	Industry	Status	Added	Actions
☐	Meridian Capital Advisors — Korin Silherson	Organization	Financial services —	Active	Jan 11, 2023	
☐	Northwind Legal LLP — John Bladson	Organization	Legal —	Active	Sep 11, 2023	
☐	Aster Health Group — Aster Health	Individual	Healthcare —	Prospect	Oct 11, 2023	
☐	Blackwood Tax Partners — Sonan Ederson	Organization	Financial services —	Active	Jan 11, 2023	
☐	Northwind Legal LLP — Asteral Smith	Individual	Healthcare —	Inactive	Oct 11, 2023	
☐	Blackwood Tax Partners — Raness Smith	Individual	Accounting —	Active	Jan 11, 2023	
☐	Blackwood Tax Partners — Boyan Smith	Organization	Accounting —	Active	May 9, 2023	

- Dashboard
- Clients
- Matters
- Engagements
- Invoices
- Team
- Reports
- Settings

← Back to clients

Meridian Capital Advisors

Organization · Financial services Active

Contact

 Jane Doe

 j.doe@meridian.com

 (212) 555-0123

 123 Financial Plaza, New York, NY 10004

 Client prefers communication via email for standard updates.

Conflict checks

Run check

parties searched	date	Status
Apex Merger Corp	Oct 26, 2023	Clear
Global Partners LLC	Nov 5, 2023	Pending
Globa Merger LLC	Dec 8, 2023	Clear

Client Team

- 

Alex Chen
Lead Partner


- 

Sarah Jenkins
Associate


- 

Mark Wilson
Paralegal



Engagements

Engagement name	Manager	Start date	Fee	Status	
Q4 Audit	Alex Chen	Nov 1, 2023	Fixed Fee - \$75,000	In Progress	Manage
Tax Planning 2024	Sarah Jenkins	Dec 10, 2023	Hourly - \$350/hr	Scheduled	Manage

Matters

Reference #	Description	Primary attorney	Due date	Priority ?	Status
MCA-001	M&A Advisory	Sarah Jenkins	Dec 15, 2023	 High	Awaiting Review
MCA-002	Tax Compliance	Mark Wilson	Jan 10, 2024	 Medium	In Progress

Discussion

- Add a note...Send
-  You

Need to follow up on the missing signatures for the MCA-001 matter. Sending reminder email now.

Today, 10:30 AM
-  Team member

Completed the initial conflict check for the Apex merger. Result is Clear. Updated the record.

Yesterday, 4:15 PM

Engagements

The commercial containers of contracted work — scope, fee arrangement, delivery lifecycle, and billing.

+ New engagement

18 engagements

Search engagements...

Status: All

Client: All

ENGAGEMENT	CLIENT	FEE	STATUS	STARTED	
FY26 Statutory Audit	Meridian Capital Advisors	\$120,000 / fixed	In Progress	Nov 12, 2023	...
M&A Advisory	Northwind Legal	\$80,000 / hourly	Review	Jan 05, 2024	...
Tax Restructuring	Blackwood Tax	\$45,000 / retainer	Proposal	Mar 18, 2024	...
Corporate Strategy Workshop	Sterling Solutions	\$55,000 / fixed	Invoiced	Feb 22, 2024	...
Financial Due Diligence	Apex Ventures	\$95,000 / fixed	Delivered	Apr 01, 2024	...
ESG Compliance Review	Horizon Manufacturing	\$70,000 / retainer	In Progress	Dec 03, 2023	...
Operational Audit	Nexus Logistics	\$60,000 / hourly	Closed	Oct 15, 2023	...
Market Entry Strategy	Global Dynamics Inc.	\$110,000 / fixed	Proposal	May 10, 2024	...

Showing 1-8 of 18 Engagements

← Back to engagements

FY26 Statutory Audit

Meridian Capital Advisors · Retainer

In Progress

Fee

\$120,000

Deliverables

3

Milestones

2

Time logged

84.5h

Advance lifecycle

Current relattor status of the engagement status.

Review

Cancelled

Deliverables

FY26 Statutory Audit

Draft

v1

Internal Revie...

Internal Review

v1

Client Review

Client Review

v1

FY26 Statutory A...

Accepted

v1

Milestones

Due date	Note	Status	
3/20/2024	Bills \$20,000	In Progress	✓
3/20/2024	Bills \$20,000	Accepted	✓

Time logged

Date	Narrative	Hours	Status
8/22/23	Brief parraton ne...	84.5h	Status
8/22/23	Ploat of docume...	8.5h	Status
8/24/23	Practicer our ren...	20h	Status

Discussion

New comment here...

Notes · 2 more ago

How uw comment note aboa this engagement?

[Home](#)[Dashboard](#)[Matters](#)[Reports](#)[Communits](#)[Promoss](#)[Users](#)[Settings](#)

Matters

The regulated threads of work — legal matters, audits, filings — with their own deadlines and sensitive-document handling.

[+ New matter](#)

Status filter ▾

Matter	Client	Priority	Status	Due	Actions
 Regulatory Investigation — SEC Inquiry (Ref: PSW-103)	Meridian Capital	Critical	Open	Oct 28, 2023	<button>Close</button>
Contract Dispute (Ref: PSW-104)	Northwind Legal	High	Open	Nov 15, 2023	<button>Close</button>
Annual Compliance Filing (Ref: PSW-105)	Aster Health	Medium	On Hold	Dec 05, 2023	<button>Close</button>
 Internal Audit - Q4 2023 (Ref: PSW-106)	ProServiceWorld Corp	Medium	Open	Dec 20, 2023	<button>Close</button>
Trademark Application (Ref: PSW-107)	BlueBird Tech	Low	Open	Jan 12, 2024	<button>Close</button>
GDPR Assessment (Ref: PSW-108)	Global Pharma Inc	High	Open	Nov 30, 2023	<button>Close</button>
 Patent Litigation (Ref: PSW-109)	QuantumLeap Dynamics	Critical	On Hold	Jan 31, 2024	<button>Close</button>
M&A Due Diligence (Ref: PSW-110)	Innovate Solutions	High	Closed	Oct 01, 2023	<button>Reopen</button>



Home



Dashboard



Experts



Engagements



Time



Matters



Engagements



Settings



Feedback

Time

Capture expert effort against engagements and matters — the raw material of billing and utilization.

[+ Log time](#)

Entries

156

Total hours

640.0h

Billable hours

512.0h

Non-billable

128.0h

Status filter



Date	Narrative	Hours	Billable	Status	Actions
06/18/2022	Reviewed working papers and drafted findings memo ...	2.5h	Yes	Draft	Submit
06/18/2022	Client call regarding compliance audit, business vrandi ...	2.5h	Yes	Submitted	Submit
06/12/2022	Updated engagement letter and submitted for approval...	2.5h	No	Approved	Approve
06/12/2022	Updated engagement letter and submitted for approval...	2.5h	Yes	Approved	Approve
06/22/2022	Client call regarding compliance submitted for approval...	2.5h	Yes	Approved	Approve
06/22/2022	Updated engagement letter and submitted for approval...	2.5h	Yes	Approved	Approve
08/22/2022	Updated engagement letter and submitted for approval...	2.5h	No	Billed	Submit
08/07/2022	Client call regarding compliance audit, rorterness suestz...	2.5h	No	Billed	Submit

 Dashboard Overview Invoices Pxperience Punding Collections Payments Metris Settings

INVOICES

Invoices

[+ New invoice](#)

Assemble invoices from time, milestones and fixed-fee schedules — and track what's outstanding.

Invoices

64

Outstanding

\$84,500

Collected

\$312,000

Status filter 

Number 	Client	Total	Status	Due	Actions
INV-2026-014 —	Meridian Capital —	\$42,000	Draft	2026-05-15	Mark paid
INV-2026-013 —	Northwind Legal —	\$18,500	Paid	2026-04-20	Mark paid
INV-2026-011 —	Aster Health —	\$9,800	Overdue	2026-05-01	Mark paid
INV-2026-010 —	Summit Tech —	\$25,000	Sent	2026-05-18	Mark paid
INV-2026-009 —	Stellar Dynamics —	\$55,000	Draft	2026-06-01	Mark paid
INV-2026-008 —	Nova Solutions —	\$12,300	Cancelled	N/A	Mark paid
INV-2026-007 —	Orion Consultants —	\$8,900	Paid	2026-04-30	Mark paid
INV-2026-006 —	Echo Media —	\$19,400	Sent	2026-05-20	Mark paid

COMPLIANCE

Compliance

The duties that travel with the work — acceptance, independence, licensing, CE, retention and legal hold — as gates, not afterthoughts.

[+ New check](#)

Status filter



Title	Type	Subject	Due	Status	Actions
Independence review —	Independence	Engagement	02/12/2023	Pending	Resolve
Engagement acceptance —	Engagement Acceptance	Client	02/12/2023	In Review	
CPA licence renewal —	Licensing	Matter	02/12/2023	In Review	
Annual Independence Confirmation	Continuing Education	Client	02/12/2023	Passed	
Auditor Independence Questionnaire	Independence	Engagement	02/12/2023	Failed	
Securities Trading Clearance —	Independence	Matter	02/12/2023	Waived	
Client Onboarding Check —	Engagement Acceptance	Client	02/12/2023	Pending	
State Bar License Renewal —	Licensing	Matter	02/12/2023	In Review	

8 checks



Home

Dashboard ▾

Manage ptetes

Conflict Checks

Matters

Users

Paytient

Settings

CONFLICT CHECKS

Conflict checks

Run before accepting a client or opening a matter — searched against existing clients, matters and counterparties, with a documented result and waiver.

[+ Run check](#)

7 checks

Client	Parties searched	Run	Status	Actions
Beta Corp	Beta Corp, Gamma LLP, John Roe	Apr 13, 2022	Clear	
Gamma LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Pending	Resolve
Gamma Confllict	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Potential Conflict	
Gamma LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Conflict	
Gamma Conflict Skns	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Waived	
John Ipsum LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Waived	

-  Home
-  Documents
-  Company
-  Status
-  Evidence
-  Documents
-  Settings

Documents

[+ Add document](#)

Engagement letters, opinions, filings and evidence — metadata, classification and legal hold here; the file itself lives in the shared Files service.

Classification filter ▾

Name	Classification	Status	Added	Actions
 Engagement Letter — Confidential — Final v2	Public	Draft	Apr 16, 2023	 
 Audit Report Draft — Privileged — Draft v1	Internal	Final	Apr 16, 2023	 
 Board Resolution — Internal — Final v1	Confidential	Final	Apr 16, 2023	 
 Board Resolution — Internal — Final v2	Confidential	Final	Apr 28, 2023	 
 Board Resolution — Internal — Draft v2	Privileged	Archived	Apr 28, 2023	 
 Board Resolution — Internal — Final v1	Privileged	Archived	Apr 28, 2023	 
 Board Resolution — Internal — Final v1	Privileged	Final	Apr 29, 2023	 
24 documents				



Practice Areas

PRACTICE AREAS

Practice areas

+ New area

The domains of service your firm offers — Tax, Audit, Litigation, Advisory — that engagements and matters classify against.

Tax Advisory

TAX



Active

Tax mner: xanition, sontitions and-simp, and matters teats.

Statutory Audit

AUD



Active

Statutory audit firm or enteriers and engagements.

Litigation

LIT



Inactive

Litigation in-charmatorical ingolgnments, and motion lepsions.

Corporate Finance

CFIN



Active

Corporate finance with wahe corporate.

Wealth Management

WMGT



Inactive

Wealth management to proalite and wealth management.

Regulatory Compliance

RCOMP



Inactive

Regulatory compliance and engagements, and matters classify against.

 Home Boanomes Matters Analytics Pamloms Invoices Users Settings

Analytics

Real, live metrics across the practice — no estimates, straight from your records.

Collected revenue

\$312,000

Collection rate

79%

Utilization

68%

Active engagements

18

Revenue by month



Engagements

Status	20
Matters	9
Unclosed	0

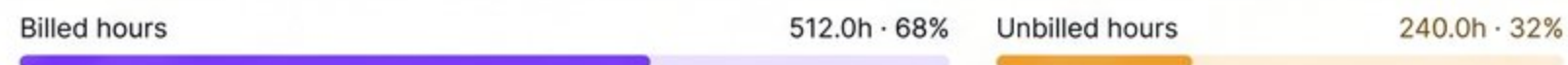
Matters

Status	20
Matters	18
Unclosed	3

Invoices

Status	18
Matters	18
Unclosed	1

Time & billing



⚡ Launching 2026 — Join the waitlist

The operating system for professional-services firms.

ProServiceWorld provides a unified, secure platform for professional-services firms to manage every aspect of their operations, from client intake to final billing. Our all-in-one operating system streamlines complex workflows, centralizes critical data, and provides deep insights: to optimize firm performance and.

[Join the Waitlist →](#)[Sign In](#)

Clients & Engagements

Manage client relationships, track engagement pipelines, and facilitate seamless onboarding from a single dashboard.



Matters & Deliverables

Centralize case and matter management, assign tasks, track milestones, and ensure timely delivery of work product.



Documents & Document Rooms

Securely store and share legal, financial, and client documents with granular access controls and secure collaboration spaces.



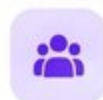
Time, Billing & Revenue

Automate time tracking, generate professional invoices, and gain real-time visibility into revenue and financial performance.



Compliance & Conflicts

Simplify regulatory compliance with integrated checks, manage ethical conflicts, and maintain comprehensive audit trails.



Governed & Multi-Tenant

Deploy and manage firm data with enterprise-grade security and data residency compliance across global offices.

ENGAGEMENTS list

[Create engagement](#)

New engagement



Client *

Meridian Capital Advisors



Name *

FY26 Statutory Audit

Practice area



Fee type

Fixed



Fee amount

120000

Currency

USD

Start date

 June 2023

Description

Cancel

[Create engagement](#)



TIME

Search...

Filter

Team Hours Minutes

 Sarah Chen 2.00 0.00 Ben Carter 3.00 10.00 Jom Team 2.00 0.00 Sarah Chen 3.00 20.00 Ben Carter 3.00 0.00 Ben Carter 8.00 0.00 Tom Eaa 4.00 0.00

Log time



Against

Engagement



Engagement *

FY26 Statutory Audit



Date

2026-07-06



Hours

2

Minutes

30

Rate (per hour)

\$ 450

Billable



Narrative

Reviewed working papers and drafted findings memo.

Cancel

Log time

Launched

+ Log sannder

July 2026



Tue

Wed

Thu

Fri

Sat

Project A
Client BProject A
Client BProject A
Client BProject A
Client BProject A
Client BProject A
Client BProject A
Client AProject A
Client B

10:15 AM

88%



ProServiceWorld



Clients



Search clients...

All Clients

Active

Prospects

Archived

AD

Acme Dynamics

Sarah Chen
SaaS

ACTIVE

GC

Globex Corp

David Miller
Healthcare

ACTIVE

IS

Innovate Solutions

Maria Garcia
Tech

PROSPECT

ZR

Zenith Retail

James Wilson
E-commerce

ACTIVE

QD

Quantum Dynamics

Alex Thompson
Consulting

PROSPECT



Dashboard



Clients



Projects



Invoices



Profile

Practice Overview / Dashboard

Practice overview

Active clients

42

Active engagements

18

Open matters

11

Unbilled hours

320h

Outstanding

\$84,500

Collected

\$312,000

Compliance due

3

Open conflicts

1

Engagements by status



Matters by status



Revenue (last months)



Documents

Add document

Name *

Engagement Letter — Acme FY26

Classification

Confidential



Choose a file...

(Optional — stored in the shared Files service.)

Description

Add document details...

☐ Place under legal hold (cannot be disposed)

Cancel

Add document

Created ↓	Owner	Status		
Dec 17, 2023	Acme Rowav	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Dec 17, 2023	Confidential	Normal		...
Sep 17, 2023	Confidential	Normal		...
Sep 11, 2023	Confidential	Normal		...
Sep 11, 2023	Confidential	Normal		...
Sep 11, 2023	Confidential	Normal		...



Dashboard

Clients

Engagements

Matters

Time

Invoices

Trust Accounting

Compliance

Conflict Checks

Documents

Practice Areas

Analytics

Signatures

My Signatures

Client Portal Access

My Portal

ProServiceWorld > Engagement detail page

Harlow & Finch LLP ▾



FY26 Group Tax Restructuring

In Review

Client: Northwind Logistics Ltd · Practice area: Tax · Fee arrangement: Fixed · Partner: A. Raymond

Unbilled hours

62.5

Milestones

3 of 5

Deliverables

2 in client review

Milestones

Name

Scoping memo — Complete

Draft structure paper — Complete

Client review — In progress

Deliverables

Name

Structure paper v3 — Client review

Board summary — Internal review

AI Assistant



Ask me to do things on this screen

Context: Engagement · id ending 4f2c

Where does this engagement stand and what is unbilled?



This engagement is status. Where does this engagement stand and what is unbilled?

- Scoping memo — Complete
- Draft structure paper — Complete
- Client review — In progress

62.5 unbilled hours.

Runs as you · credits checked

AI client — proserviceworld MCP

 proserviceworld · 23 tools

 Which Northwind engagements are in review and what is unbilled?

> proserviceworld_clients_list

> proserviceworld_engagements_list

▼ proserviceworld_time_log not called

-  Currently, the following two engagements are in review:
- 1. FY26 Group Tax Restructuring (Northwind Logistics Ltd): 62.5 unbilled hours.
 - 2. Corporate Compliance Audit (Global Systems Inc.): 45.0 unbilled hours.

Signed in as a.raymond@harlowfinch.com · inherits your roles



 Dashboard

 Clients

 Engagements

 Matters

 Time

 Invoices

 Trust Accounting

 Compliance

 Conflict Checks

 Documents

 Practice Areas

 Analytics

 Signatures

 My Signatures

 Client Portal Access

 My Portal

Workspace/Organ... ▾

🔍 Global search



Engagements

Engagement	Client	Practice area	Status	Fee	Unbilled
FY26 Group Tax Restructuring	Northwind Logistics Ltd	Tax	In Review	Fixed	62.5h
Insurance Book Review	Calder Brokers	Advisory	In Progress	Hourly	18.0h



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- Compliance
- Conflict Checks
- Documents
- Practice Areas
- Analytics
- Signatures
- My Signatures
- Client Portal Access
- My Portal

Platform

Permissions

Export

Activity & audit export

Last 7 days

Mutations only

All actors

Time ↓	Actor	Operation	Resource	Result
09:14	a.raymond	pswUpdateClient	Client 8c41	Success
09:12	a.raymond	pswLogTimeEntry	Time entry 22b9	Success
08:57	m.okafor	pswResolveConflictCheck	Conflict check 5d10	Success

pswUpdateClient



contactEmail [REDACTED]
contactPhone [REDACTED]
notes [REDACTED]
id 8c411-6778ec34ea1
workspaceId [REDACTED]
clientId [REDACTED]
address [REDACTED]
status ACTIVE

Privileged/confidential records retain structural fields only



- Dashboard
- Clients
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- Compliance
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- My Signatures
- Client Portal Access
- My Portal

Conflict check — Northwind Logistics Ltd Pending

Searched parties Northwind Logistics Ltd Vale Freight Holdings J. Petrov

Proposed findings (concept) Roadmap

- 1 High — Vale Freight Holdings appears as opposing party on matter M-2291 (closed Mar 2025) View record
- 2 Medium — J. Petrov listed as director of existing client Calder Brokers View record
- 3 Low — Name similarity only: Northwind Marine Ltd, no engagement history View record

Attach as draft finding Clear check Waive with reason

Deterministic match over your own records - reasoning attached - a human still clears or waives



- Dashboard
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- Compliance
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- My Portal

AI Operations

Findings Activity Spend

Cadence: Daily 07:00 · Asia/Kolkata · off by default

FY26 Group Tax Restructuring

High

5 weeks in Review, 62.5h unbilled, 1 open compliance check

Records read: engagement, 14 time entries, 1 compliance check

Open engagement

Dismiss

Insurance Book Review

Medium

invoice 30 days outstanding, retainer expiring

Estate Planning

Low

deliverable in client review 21 days

Run summary: 42 engagements scanned · 3 findings · model pass on 3 · cost 0.4 credits

Proposals only — this loop never changes a record



Draft invoice INV-2026-0412 — Northwind Logistics Ltd

Billable hours

62.5

Draft total

9,375.00

Findings

4

Date	Practitioner	Hours	Rate	Narrative	Finding
12 Jun	A. Raymond	3.5	150	"call"	"Thin narrative"
13 Jun	S. Mehta	6.0	150	"review"	"Thin narrative"
14 Jun	A. Raymond	4.0	150	Drafted structure paper v3	OK
15 Jun	S. Mehta	2.0	175	Client call re filing	Rate differs from engagement fee arrangement

Suggested narrative (concept)

Roadmap

Draft

Reviewed draft structure paper v3 ahead of client review; updated milestone Client review

Based on: deliverable v3 moved to Client review, milestone updated 13 Jun

Accept

Edit

Reject