



# The OneAdvanced Journey

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Practice and Case Management

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## ***How was your experience while investigating, and purchasing, OneAdvanced Legal?***

The experience was quick and positive. The licence for our old system was about to expire in February. When I was offered the new modern and best-of-breed software with all the advanced features, I didn't think too long. The offer was too good to miss.

OneAdvanced Sales, Product and Solutions teams were thorough, detailed and consistent in their product demonstrations and explanations. Tashan Everett and Bradleigh Smith were at the beginning of my journey, but were supported by many others too.

## ***What do you think of the OneAdvanced Legal portfolio so far?***

The portfolio has all the features of the previous system, but is much improved with new, convenient, and very useful tools. I was worried that I might not find the familiar, favourite features of the old software, but they are all there.

The data transfer was very accurate. I'd like to give a huge thanks to the Professional Services team who did such a great job for us.

eLearning is also absolutely brilliant. It's helped a lot, especially at the start.

## ***What features are you finding most useful or valuable to have?***

Some of the new or improved features and tools are:

- Posting in general is much easier and quicker, and shows the balance on the ledger before I press save
- The set-up for the posting of clients, interest, and calculation of interest, between chosen dates is a great new feature
- The ability to use various search criteria for nominal- to-nominal transfers, is a big improvement
- . . . and hiding reversed entries helps a lot to keep everything tidy 😊
- You don't need to close the month before you start posting to the next one - posting goes to the correct period automatically according to dates, and exports client ledgers to Excel

## ***How have you found your time working with Advanced in the Early Adopter process?***

It's been a very positive experience, thanks to Lucy Pinder for all the regular updates, answering enquiries, resolving issues and generally keeping her eye on everything.

I had a very informative, and helpful sessions with Michael Thomas and Mike Walker. The support Team on the other end of the dedicated phone line is brilliant, I've spoken so far with Pete, Rob, and Kohen.

This is just short thanks, but there many more colleagues from OneAdvanced who were helping with much wider services. Everything is quick, efficient and professional.