

# Product Overview

TRUST *e* SOLUTIONS  
Version 4.0



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A new vision in bankruptcy case management.

## Customized Case Management

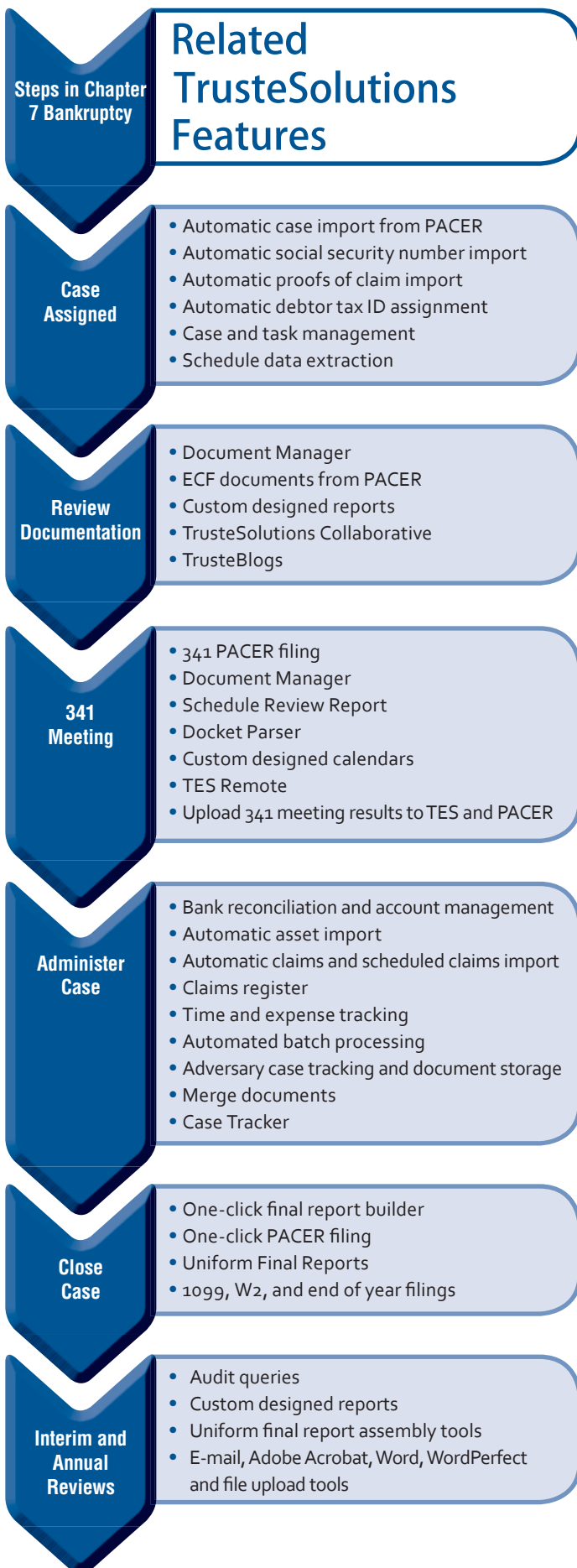
Effective customization of technology that supports case management processes translates into improved efficiency. TrusteSolutions™ software simplifies case administration with its flexible framework. Trustees can get to their information quickly, automate manual processes, and focus on revenue-generating functions instead of data entry.

### Features and Highlights

- **Consolidated 341 Preparation** – From a single screen trustees can do tasks including:
  - Create 341 meeting agendas
  - View case lists and generate reports
  - Update 341 meeting status
  - Submit PACER filings
  - Download documents and case status to TES remote to take to 341 meetings
- **Schedule Review** – To be profitable, trustees must be able to quickly separate asset cases from no-asset cases. TrusteSolutions develops custom Schedule Review reports with each trustee that show the exact data needed to make quick, informed decisions.
- **Interim Report Preparation** – Creating interim reports is time consuming and stressful. TrusteSolutions supplies trustees with audit reports that flag a wide variety of data issues and enable the trustees to fix problems easily. These reports can be further specialized to meet the unique needs of each office.
- **Report Assembly** – TrusteSolutions aggregates all United State Trustee (UST) required reports into a single area so they are easy to find, assemble, and file electronically.

### Unparalleled Access to Data

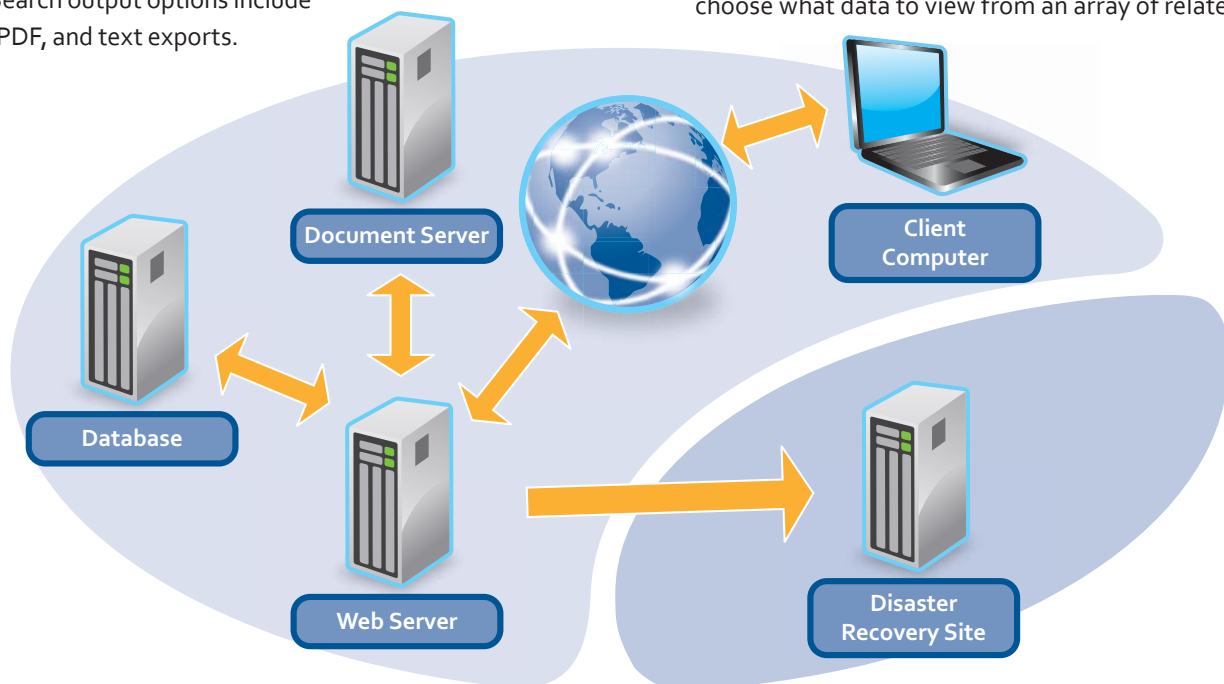
TrusteSolutions enables trustees to be more efficient by building upon our highly customizable framework. TrusteSolutions offers comprehensive data management capabilities and robust search options. The interface is intuitive and has an improved screen layout. Used in combination, these features help reduce the time trustee offices spend on data entry and other manual tasks.



## Features and Highlights

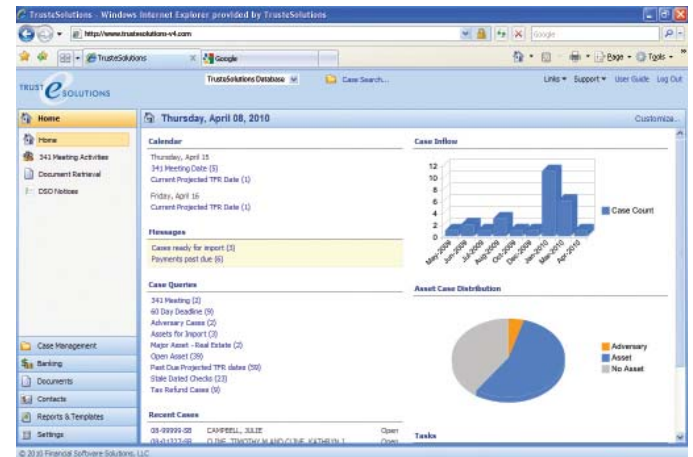
The TrusteSolutions database is optimized to give trustees unparalleled access to their case data.

- **Docket Parser** – The TrusteSolutions Docket Parser extracts data from docket entries and stores it in the TrusteSolutions database. The TrusteSolutions customizable framework can present the data in a variety of ways, from adding tasks to calendars based on types of docket entries, to storing important upcoming dates, extracting fee and expense amounts, and automating data entry. Efficiencies can be created by automating these manual functions and synthesizing data into meaningful reports.
- **Custom Reports** – The flexible framework enables TrusteSolutions to develop most custom reports within days of the request being made.
- **Document Manager** – The Document Manager is a complete online file management system. Users can batch upload and access a variety of file types including e-mails, ECF documents, correspondence, bank statements, and voice mails. Document Manager permits the user to share files with certain professionals, allows the user to quickly e-mail ECF documents, and provides the user a means of quickly adding time, expense, or task entries linked to a specific document. Drag-and-drop file categorization, e-mail, and file upload are also available.
- **Advanced Search Options** – TrusteSolutions enables users to conduct global searches for cases and documents. They can customize their search results by narrowing parameters such as case status, document category, and 341 hearing date. Search output options include Excel, PDF, and text exports.



## Intuitive and Customizable

TrusteSolutions is simple to learn and use because the interface is modelled after commonly used software like Microsoft® Office Outlook. Regularly used features are easily accessible, and the screen layout is standardized across all features.



## Features and Highlights

- **Customizable Home Screen** – The home screen offers a high-level view of important information related to current and upcoming cases. Users can access their calendar, import new cases, run custom queries, see upcoming tasks, and navigate to recent cases. Users can also create their own home screen by adding, removing, and rearranging the panels.
- **Customizable Screens** – TrusteSolutions allows the user to modify the view of the case, asset, claims, transactions, and many other screens. The user can choose what data to view from an array of related data.



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