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Sophisticated, Matter-Centric, and Cloud-Based Legal Practice Management Software with Full Office 365 Integration

“Matter365 provides an extensive view of activity, documents, and reporting related to a matter and a new client and matter can be created with just a few mouse clicks.”

Company Name Brand
Matter365 Inc.

Product and Service Name Brand
Matter365

Recent Developments and Updates

- See a full breakdown of matter billings including time spent on matters, billable time, expenses, work in progress, and total amounts invoiced and collected.
- Add data to searchable custom fields when creating or importing new matters.
- Create time tracking and expenses for other users.
- Configure time tracking and expense items to display in invoice descriptions.

Streamlined and Powerful Legal Practice Management

Practice management software is supposed to streamline workflow, make information more accessible, and complement your daily processes. Matter365 checks those boxes by offering lawyers legal practice

management (LPM) features directly atop Microsoft 365. Single sign on (SSO) with Office 365 credentials lands you securely and directly on the home dashboard. See *Figure 1*.

A Matter-Centric View of Key Information

Matter365 provides an extensive view of activity, documents, and reporting related to a matter and a new client and matter can be created with just a few mouse clicks. Including information such as responsible and originating attorneys, source or referral, and special notes, just to name a few, enables powerful searching and tracking as a matter advances. You can customize data to collect for new matter entries in order to accommodate specific case types and you can include custom fields such as court docket number and statute of limitations. Before completing a matter setup, Matter365 gives you the option to run a conflict check on new clients by searching all the objects in your

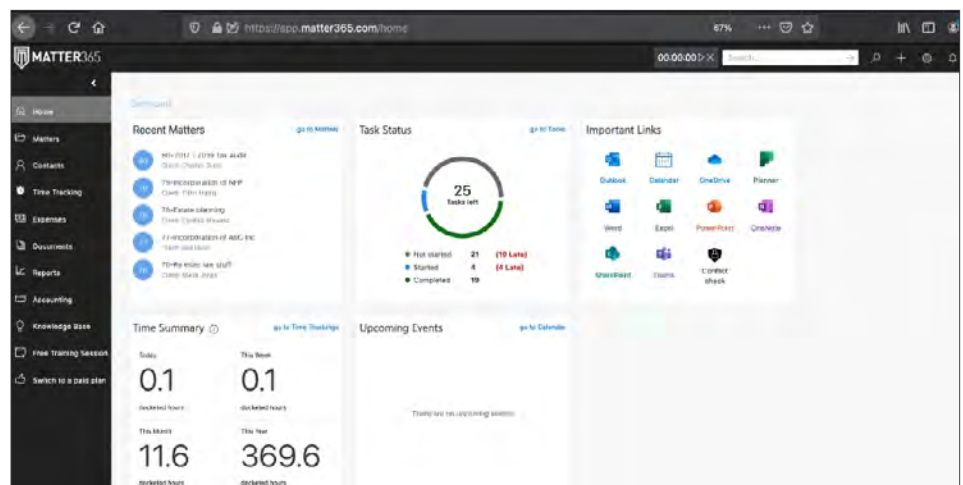


Figure 1: View recent matters and time entries, track tasks, see upcoming calendar events, and get access to Microsoft Office 365 tools and the company’s conflict checker app on the Matter 365 home dashboard. The navigation panel on the left and the timer at the top of the application remain sticky in all web views.

“By connecting Microsoft groups to matters, Matter365 creates a matter-centric organization within your Microsoft Office environment.”

“It’s easy to apply a task template to a matter plan and assign attorneys and paralegals to complete client requirements and deliver work product.”

account and returning the results in a separate window for easy review.

When a new matter is created, Matter365 creates a corresponding group in Microsoft 365. Groups are the linchpin of Microsoft 365 as apps like Planner, SharePoint, and Teams revolve around groups. By connecting Microsoft groups to matters, Matter365 creates a Matter-Centric organization within your Microsoft Office environment

Matter details are conveniently available when accessing a matter including client names and contact information, responsible attorneys, and other people pertinent to the record. Documents most recently worked on for the matter are handily displayed in the next panel to the right of matter details. An overview of open tasks for the case is also readily available along with billing and invoicing numbers. *See Figure 2.*

Familiar tabs are displayed across the top of the matter details view and provide access to documents, calendar tasks, contacts, time tracking, expenses, and notes which are all focused on the matter. A simple click on the “Show all Matter Details” link opens a window displaying at a glance key information including the matter name, status, and the group email (for example, mattername@domain.com) to send messages and other vital case information.

Tasks, Contact Details, and Microsoft Planner

You can easily access and edit a client’s contact details by clicking on their name in the matter dashboard. Matters also include the responsible attorneys, the owner, members, and guests with the ability to view matter details. Permissions are inclusive and align with group membership, so, if you’re not associated with the group, you cannot access the matter or its related documents.

Opening the tasks view from the matter page takes you directly to Microsoft Planner to observe and edit the particular matter plan. Planner empowers you to **create project templates** based on case types, attorney roles, venues, and more and includes organized tasks and subtasks for a matter. It’s easy to apply a task template to a matter plan and assign attorneys and paralegals to complete client requirements and deliver work product. Planner automatically notifies your colleagues of assignments and due dates and keeps cases on track to completion. If you haven’t looked into Planner and its potential to positively impact your efficiency, it’s worth consideration to add a review to your to-do list. *See Figure 3 on the next page.*

Viewing Documents and Emails

You can view documents in Matter365 in a fully customizable folder structure with the same view and access available with

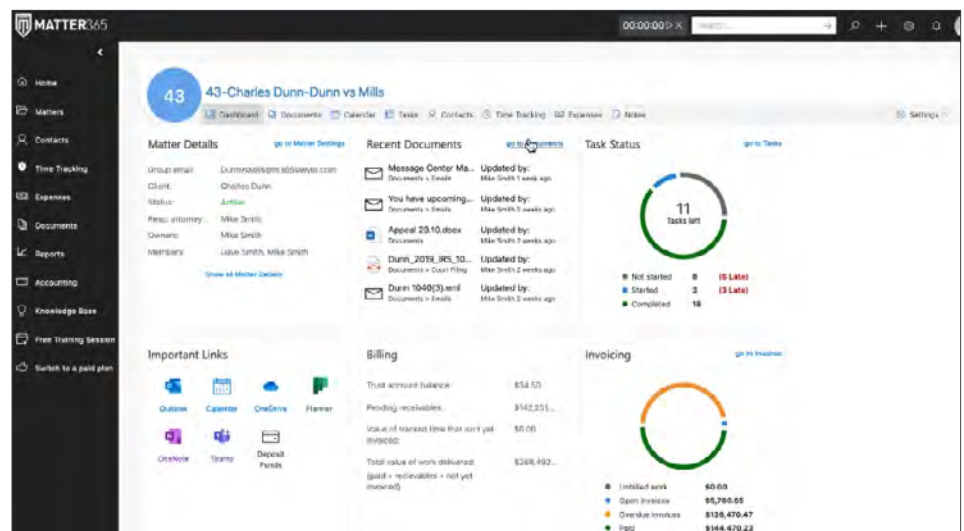


Figure 2: Matter365’s matter-centric view presents all of the critical features on a matter’s start page with drill-down links to matter settings, documents, and tasks.

“ The tagging feature in Matter365 delivers easy access to files and incorporating labels can trigger automated tasks in a matter workflow.”

“ Matter365 makes great use of the Office 365 environment by using groups to create the resources for document management, tasks (including assigning and oversight), and having OneNote and Outlook available to all users so everyone is on the same page.”

Jim Worthington,
Worthington Law Firm

Microsoft OneDrive on the desktop. Even without having to log into Matter365, you still have access to your data in Microsoft 365 whether in Outlook, OneDrive, or other Office apps. The tagging feature in Matter365 delivers easy access to files. Incorporating labels can trigger automated tasks in a matter workflow.

Matter365 works with Outlook to review emails related to matters and conveniently save incoming messages to group content. In Outlook's left navigation pane you can view all matter-related messages listed by groups. See Figure 4 on the next page.

Powerful Time Tracking and Billing Plus QuickBooks Integration

A **one-click timer** enables simplified access to track time in any web view with options to choose an applicable billing rate and apply a relevant task code. You can quickly return to a configured timer if an interruption occurs. Matter365 incorporates the Uniform Task-Based Management System (UTBMS) codes and custom task codes can also be configured. Like the web view, you can start and stop timers in core Office apps online or via a desktop version such as Outlook. That makes it easy to manage time anywhere in Microsoft 365.

Matter365 offers integration with QuickBooks Online through an application programming interface (API) and leverages

the time tracking and expense windows to enable the creation of invoices using Matter365 client data along with selectable terms, rates, discounts, and time and expense entries. For billing and invoicing, you can also export Matter365 time and expense entries in CSV format and upload them to your preferred billing app. See Figure 5 on the next page.

QuickBooks Online integration lets you choose display options such as showing the full name or initials of lawyers who provided service along with the entry description.

The billing and invoicing overviews found in the Matter365 home and matter view pull directly from QuickBooks Online. Sending and receiving updates from Intuit's accounting and bookkeeping platform keeps you apprised of paid and outstanding invoices. Using QuickBooks, Matter365 further supports management of operating accounts and trust accounting.

You can generate standard reports for accounts receivable, billing, docketed hours, and work in progress by clients and matters over time as well as by other criteria. Drill-down reports for matter and attorney details are also in the works.

Matter365 does not integrate with Microsoft 365 advanced tools such as PowerAutomate, PowerBI, and Dynamics

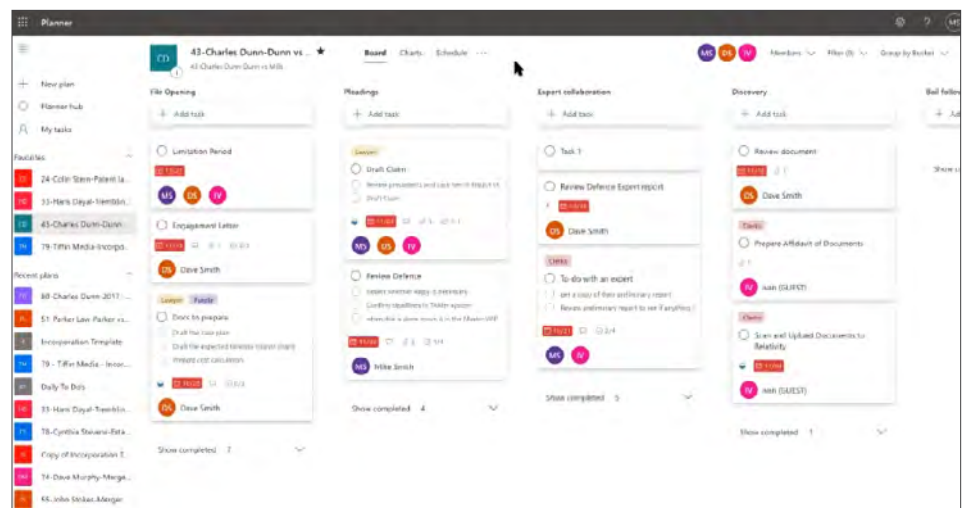


Figure 3: In Matter365's Planner view you can review all tasks related to matter plans and access other matter tools including OneNote and SharePoint. Additionally, you can export plan details to Excel and add plans to the matter's Outlook calendar.

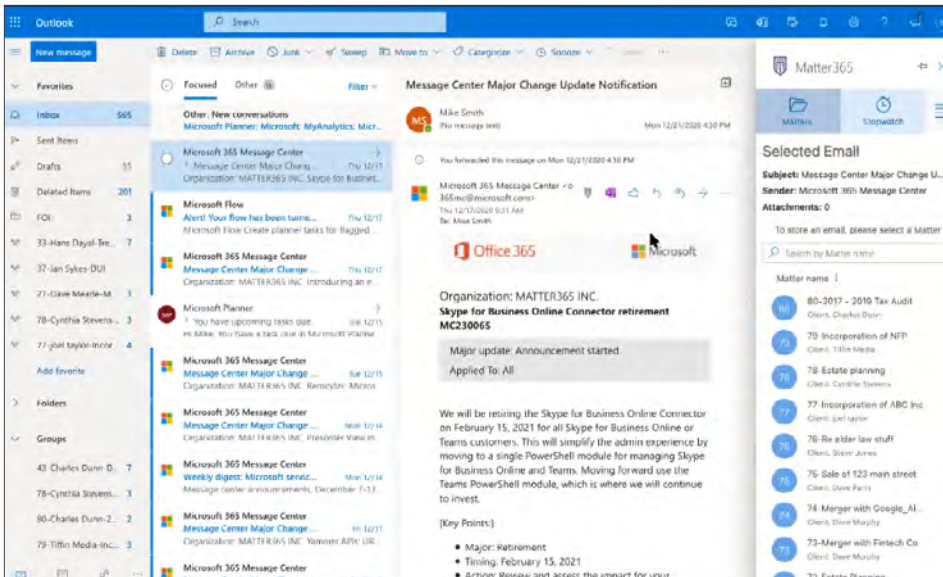


Figure 4: Matter365's Outlook add-in works in the online and desktop version. Anyone with group permission can view matter-related email and attachments and can move incoming messages to a matter.

365. As the company continues to roll out its roadmap, future enhancements are slated to include connection to more Microsoft tools and a document automation piece for customers in order to create documents from matter data.

To transform your Microsoft 365 into an LPM, Matter365 costs \$29.99 per user per month (billed annually) or \$37.99 on a month-to-month basis.

Who is Matter365?

Since 2018, **Matter365** has developed their eponymous law practice management software with deep integration into Microsoft 365. With offices in Toronto, the Boston-based company launched its beta offering in 2018 and the product became generally available in June 2019. Matter365 is steadily growing across four continents, focusing on solo practitioners and small to midsize law firms (up to 100 attorneys) that use Microsoft 365 in the US and Canadian markets. The company's target market is the cross section of lawyers within the more than **155 million active monthly business users** of Microsoft 365.

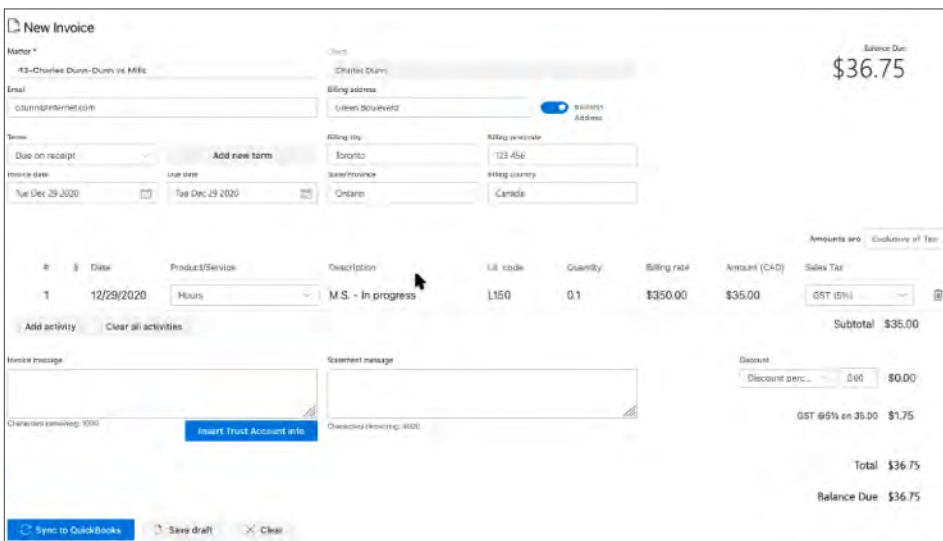


Figure 5: Create and save draft invoices in Matter365. When you're ready to bill, generate the invoice, sync it with QuickBooks, and then send the bill via Matter365 controls.

Why should you use Matter365?

- Works with Microsoft 365 to fully use your Office apps for LPM.
- All of your client data resides in your Microsoft Account, not with Matter365.
- The web-based software supports add-ins for core Office online and desktop apps.
- The company offers free training and onboarding support.
- Competitive pricing for the use of Matter365 with Microsoft 365.

Try Matter365 Today!

Try Matter365 for free for 30 days from the product home page using Microsoft 365 credentials.

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