WHAT IS MATTERPRO™

- matterPRO™ is a complete document and case management system for the legal space.

- matterPRO™ is a seamless, self-service, industry-specific solution that will accelerate and streamline any New Matter Intake and Management process.

- Powered by the K2 Five Platform, matterPRO™ is a configurable matter management software solution that allows your legal team to manage all matters in one place and on any device.

CUSTOMIZABLE MATTER MANAGEMENT TOOLS

- Accounts Payable
- Add New Client to Matter
- Archive Disengaged
- Bulk Mailing
- Case Settlement
- Conflict Check
- Declination
- Disengagement

- Document Index & Auto Profiling
- Email Validation
- External Lead Intake
- Mail Merge
- Medical Records Request
- Medical Records Review
- New Welcome Package
- New Matter Intake

ALERTS & NOTIFICATIONS

- Changes in Statute of Limitations
- New Paralegal Assigned
- New Intake Specialist Assigned
- New Attorney Assigned
- Client Re-engagement
- Matter Reassignment
- Case-Related Comments
- And Many More.....

CUSTOM INTEGRATIONS

matterPRO™ seamlessly integrates with many third-party systems.

Active Directory	Google	SharePoint 2013, 2016
Compulaw	iManage	SQL Server & Reporting
Concur	Microsoft Office 365	TImeZone Management
Dropbox	Mail Parcer.IO	Twilio
Elite Thompson Reuters	Oracle	UPS
Exchange	RecordTrak	USPS
FedEx	Salesforce	Verscend (Verisk, MediConnect)

OPTIONAL PRODUCT SERVICES

These optional services can further enhance the New Matter Intake & Management processes.

- Auto PDF
- Custom Escalation Service
- Document Tagging (QR Code)
- Google Geospatial Address Verification
- iManage/Elite Workspace Synchronization
- RecordTrak, Verscend Medical Record Profiling & Synchronization
- Shipping & Tracking Service (UPS/FedEx/USPS)
- Statute of Limitations Notifications
- Twilio SMS/MMS Texting with Automatic Conversation Profiling
- Website Lead Generation Connectivity

ARTIFICIAL & BUSINESS INTELLIGENCE

- Visual Maps
- Determine Current Process Bottlenecks
- Data Drill-Down Capabilities
- Intelligent Scoring of New Matters
- Dashboards & Reports
- Immediate & Accurate Auto-Fill
- Precise Auto-population of Client Data

MATTERPRO™ BI FINANCIAL DASHBOARD

The matterPRO™ BI Financial Dashboard integrates with your current time and billing system to provide a visual summary of Key Performance Indicators (KPI), Work-In-Progress, and Accounts Receivable data. The Dashboard is role-based and proides a detailed 360-degree view of all time and billing information.

- KPI summary that includes over 25 business and financial health metrics
- All graphs and charts include drill-down capabilities to view detailed data
- Budgets can be created at the Timekeeper, Matter, Department, Title, and/or Phase Level
- Data can be easily exported and shared via Print, Save as Excel, or E-mail Excel Attachment functionalities
- Administrators can configure KPIs, chart types, colors, and data formats by role
- An Accounts Receivable view reflects outstanding costs and fees while the Work-In-Progress view displays time spent but not yet billed

METHOD AUTOMATION SERVICES

ABOUT US

Method Automation Services connects people, processes, and technology. We build configurable digital process automation solutions that work with your current systems and infrastructure. Our top-tier team of business and technical architects, project managers, UX designers, and developers understand the power of business process automation for any industry and closely work with you for a seamless transformation.

OUR SOLUTIONS

- Accounts Payable
- BI Dashboard
- Change Request
- MAPWorkfloz
- matterPRO ™
- SaaS Connectors & Service Brokers
- Time Off Request Management
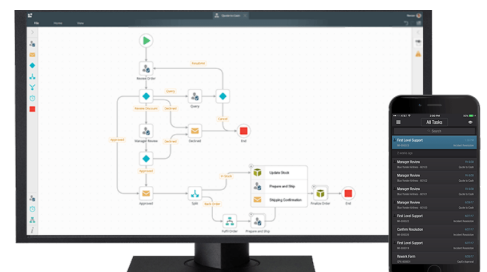- Supprt Ticket System

OUR SERVICES

Many companies struggle with error-prone manual processes across disconnected systems. Method Automation excels at solving the challenges that occur with building and supporting critical business solutions. Method Automation has delivered hundreds of initial K2 platform applications to help small and enterprise organizations achieve their goals.

BUSINESS PROCESS AUTOMATION

Process Automation combined with Workflow Integration simplifies and improves business processes. Consistent automated business rules streamline cross-departmental efforts and accelerate tasks and procedures. A configurable digitized form solution guarantees your data will automatically and safely flow in and out of your current business systems. Here are a few more reasons why we use K2.

- Low-code process automation tool
- User-friendly & re-usable forms
- Automatic notifications
- Clear process visibility
- Content permission control
- Customized reporting system and full audit trails
- IT department backing reduction
- Administrative process approvals, security setup, & error handling

Connect With Us!