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Hot new products for lawyers and law office administrators.

Synergy Matters Automates the Capture of Client-Related Documents and Email

By Neil J. Squillante

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Even the most detail-oriented lawyers find it challenging to keep all the information associated with a matter in one convenient location. You shouldn't have to develop elaborate systems to achieve this. Instead, software should do this work for you.

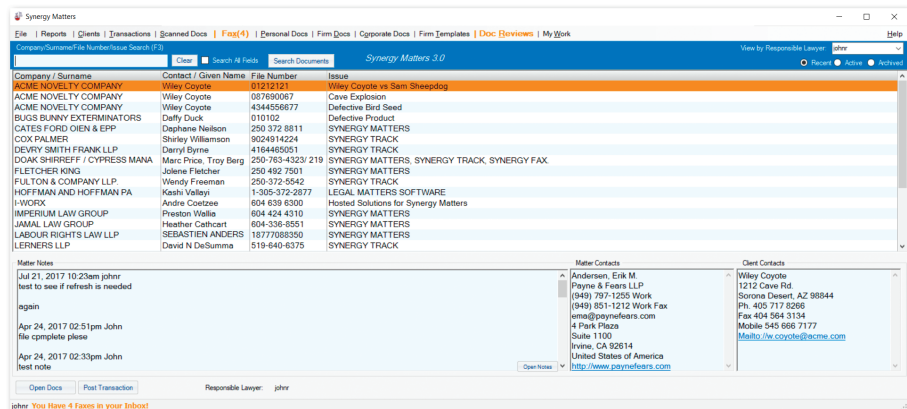
Synergy Matters 3.0 ... in One Sentence

Launching this week, Legal Matters Software's **Synergy Matters 3.0** is a document and email management system that automates the consolidation of all client-related data.

The Killer Feature

You can begin using Synergy Matters immediately after importing your client and matter information from your accounting software. As users work on matters, Synergy Matters prompts them to import their existing documents. The Outlook add-in works similarly, enabling you to import email and attachments. Legal Matters Software

“The intuitive nature of Synergy Matters makes training new staff easy, and having the same interface for bringing in emails, scans, faxes and downloaded research means the documents all end up in the correct place,” says Troy Berg, Manager, Information Technology at Doak Shirreff.



Synergy Matters Dashboard

President John Ryan tells me that most law firms get up and running in less than a day, often just two hours.

Once you import a matter's documents and email, you can grant access rights to matters and organize the information within matters using nested folders as you see fit. From this point forward, a number of tools keep all new documents and email within Synergy Matters. Automatic email capture occurs whether you initiate messages from within a matter in Synergy Matters or from within Outlook. In the latter scenario, the Outlook add-in enables you to attach documents from Synergy Matters and save your message in the corresponding matter. A similar Microsoft Word add-in captures all new client-related documents.

Integration with scanners helps you go paperless. Built-in OCR makes these scanned PDF files searchable. Synergy Matters also captures incoming and outgoing faxes.

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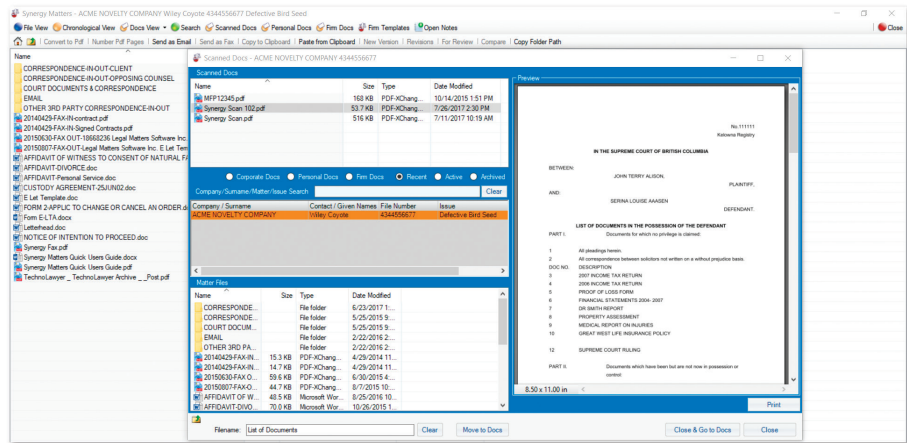
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Other Notable Features

Synergy Matters also offers new collaboration tools. When you use the For Review tool to send a document to a colleague, Synergy Matters marks the document as out for review and notifies your colleague. If your colleague makes changes, Synergy Matters creates a new version. Click the History button for a complete audit trail of who worked on the document and when. You can revert to any prior version as well as create a new version with its own history.

“Synergy Matters 3.0 is the result of lawyers working closely with us to enhance their workflows,” says Ryan. “In particular, the For Review process offers foolproof internal collaboration with an audit trail.”

Synergy Matters’ dashboard lists your active cases within the past 30 days. The search bar



Synergy Matters Scanner Integration

enables you to find any case. Within matters, the new Chronological View lists all the files in reverse chronological order regardless of their location within a folder.

What Else Should You Know?

Other features of Synergy Matters include Combine as PDF to merge selected documents into a single PDF file, automatic time capture of your activity for billing or proof of work when splitting fees, ethical walls, a notes tickler within each matter, and cost recovery. Synergy Matters runs on Windows PCs. Pricing starts at \$125 per month for up to five users.

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John Ryan
President
Legal Matters Software inc.
2217 Helgason Drive
West Kelowna, BC V4T 2W9 Canada
(855) 822-4567
jryan@legalmatterssoftware.com
legalmatterssoftware.com

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