



CorpIntake™

NEVER MISS A CRITICAL DATE OR DEADLINE

A Powerful Docketing, Tickler, and Calendar System

MatterAlert is a matter-centric tickler and docketing system designed to help legal teams manage all matter related information seamlessly in one platform. The right tickler and docketing system makes it easy to keep track of all critical dates across all matters so that you **never miss any deadlines**. Here are summary of the features:

Court Rules

Automatic Calendar Event Creation

MatterAlert is integrated to Court-Rules Service which tracks critical trigger dates (such as limitation periods, deadlines, trial dates, etc.) of select courts across **North America**.

Based on Court Rules, calendar events and reminders are automatically created at the time of creating a matter.

Dates are tracked during lifetime of a matter, and if a court updates their rules, calendar events are automatically updated to reflect the new dates.

Matter Templates

Design Matter Templates for different matter types (e.g. IP matters) or specific clients to enforce collection of certain information and documents, and to automate creation of tasks and calendar events everytime a matter of same type is created.

Matter Dashboard

View/update all matter related information in one central place. This is made possible by integration to accounting system, document system, and Microsoft 365/Exchange.

Reminders

Unlimited number of reminders can be setup for each event or appointment. The reminders will be sync'd with every user's calendar and are automatically adjusted for all users when dates of the events change.

Notifications

MatterAlert notifications makes sure the matter team never misses any critical dates or limitation periods:
In-dashboard • Individual Emails • Daily Consolidated Emails • Calendar Reminders and Updates

Accounting System Integration

Matter Alert is integrated to well-known accounting systems such as **3E** and **Aderant**. Matter, client, and timekeeper information can be imported to MatterAlert automatically.

Automatic Syncing of Dates and Rules

Limitation periods and critical dates (e.g. court date or mediation date) may change over matter life span for different reasons. MatterAlert automatically adjusts calendar events dates as those dates change - either automatically or through Court Rules update, and then syncs it with all user calendars.

Ethical Wall

We understand how important it is to keep matter related information private and only accessible by the proper stakeholders. MatterAlert can be setup to synchronize with your in-house ethical wall, so when a new matter is uploaded into MatterAlert, by default only the approved users would have access to the information pertaining to that specific matter. Approved users can be manually added or removed from within the application as well.

Assistant Friendly

An assistant can be approved to manage their attorney's calendars on MatterAlert, as well as having their own personal calendar which allows them to create, change and set appointments, reminders, and assign matter specific tasks.

Variable Views and Powerful Search

When looking through upcoming events, appointments, or reminders in MatterAlert you are given the choice to view them in the calendar format or a detailed list that can be sorted, filtered, and searched based on matter, tags, assignees, dates, and other metadata assigned to each matter.

Bulk Updates

Matter teams change as people leave or join the company or the team. Using bulk updates, a docketing manager can seamlessly make bulk changes to events related to a matter or across multiple matters. For example, when an attorney departs from the firm, all events, appointments, and tasks created in MatterAlert can be assigned to a new attorney with just a few clicks. Those changes are automatically reflected in Outlook for each affected user.

Task Escalation

A specific type of timekeeper (e.g. Matter Attorney) can be defined in the matter template so that they are notified when important tasks are due and not marked as completed. This is a double measure ensuring that critical tasks are dealt with within the allotted timeframe.

Distribution Lists

Tasks and Events can be assigned to Distribution Lists (e.g. IP Department) - instead of an individual. Any member of the Distribution List will receive the event in their calendar automatically.

External Attendees

External contacts can be included as event attendees (if you choose to); in which case, the system will automatically send them event invites and reminders. This flexibility makes communication with clients and other parties so much easier and seamless.

Audit Logs

Any changes in the system is logged and can be audited. Changes include any update in the matter, adding or removing attendees, or updating any calendar task or event.

Outlook Integration

MatterAlert seamlessly integrates into **Office365** and **Exchange Servers** (2010 and above). So, calendar events and reminders created or updated in MatterAlert are automatically reflected in Outlook. With an efficiently crafted work schedule for each user, operations can run smoothly and cost effectively, boosting productivity and profitability at the same time.



Microsoft 365



Exchange 2010+

Easy Rollout

No problematic desktop installations is needed. MatterAlert is **web-based**; all the users need to connect is a browser.

Our application design is clean, modern, and responsive, and it adapts to the size of the screen users use; whether it is a desktop, tablet, or any mobile device.

Partnerships:



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