



# MatterAlert™

NEVER MISS A CRITICAL DATE OR DEADLINE

## A Powerful Docketing, Calendaring & Tickler System + MATTER DASHBOARD

MatterAlert is a matter portal and a docketing, tickler, and calendar 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 critical dates across all matters so that you **never miss any deadlines.**

Here is a summary of the features:

### 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.

### Court Rules

#### Automatic Calendar Event Creation

MatterAlert is integrated to the Calendar-Rules service which tracks critical trigger dates (e.g. deadlines, trial dates, etc.) of courts across **North America.**

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

The dates are tracked during the lifetime of a matter, and when a court updates their rules, calendar events are automatically updated.

### Matter Templates

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

### 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 make 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

MatterAlert 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 the matter's 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 them with all user calendars.

## Ethical Wall

We understand how important it is to keep matter-related information private and make it accessible to authorized 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 of 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 an extra measure, ensuring the timely completion of critical tasks within the allocated 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 feature improves communication with clients, delivering a more efficient and seamless experience.

## Audit Logs

Any changes in the system are logged and can be audited. Changes include any updates to the matter, added or removed attendees, or any task or calendar event updates.

## Outlook Integration

MatterAlert seamlessly integrates into **Microsoft 365** 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+

## Pacer & Court Notices

Receive court notices and dockets automatically with live court docketing and case information.

- Monitor case for any updates.
- Covers federal districts and Bankruptcy courts.
- Email alerts on new dockets.
- Automatic or on-demand document download.
- Integrated to DMS (iManage, netdocuments)

### Partnerships:



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