3E MATTERSPHERE INTEGRATION WITH 3E

INTEGRATE YOUR MATTER MANAGEMENT AND FINANCIAL SOLUTIONS FOR A FULL OFFICE SUITE

One of the biggest challenges facing firms today is to find ways to integrate siloed data and close the gap between transactional and case-based information. For your firm to succeed, you need a complete, end-to-end software solution that not only gives you financial and practice management tools, but also has the capability to integrate these critical processes across the board. Thomson Reuters Elite delivers both. 3E® MatterSphere® integrates seamlessly with 3E, providing you with a complete solution that handles both front and back office operations, improving efficiency and productivity and ultimately increasing profitability.

By integrating MatterSphere with 3E, you overcome the challenges of siloed data, close the divide between the financial system and the matter management system, eliminate the need to jump between programs, and save your users valuable time. MatterSphere revolutionizes matter management operations by enabling firms to view and manage day-to-day activities, including working with clients, cases, workloads, and related documents and reference materials, all from within the Microsoft® Office® environment. 3E provides powerful financial and practice

management tools that automate your accounting operations and offer instant access to critical financial and operational data.

With a simple click on the MatterSphere Ribbon Bar, the real-time back office information created through 3E is instantly and easily available to the front office. In addition, because MatterSphere is embedded in the familiar Microsoft Office application, it naturally connects to how fee earners work and minimizes training requirements. MatterSphere can passively capture time spent on certain MatterSphere activities, so there is no need to log on and off the system, resulting in less missed time. MatterSphere can be customized to your firm's business processes through the Software Developer Kit. Desktop users can choose the functions they want as they need them with the MatterSphere modular design. You gain an overall integrated solution and have the best of the most powerful of capabilities available to professional services organizations.

With MatterSphere you can move ahead to a more profitable future knowing that you are working with one of the world's leaders in providing professional services firms with the most innovative of business solutions. With more than 70 years of experience, Thomson Reuters Elite has the proven expertise to make it happen for you.

INNOVATIVE SOLUTIONS FOR MORE THAN 70 YEARS

Whether you are part of a global institution, a multi-national firm, a boutique practice, a mid- or small-sized firm, a corporate legal department, or a government agency, Thomson Reuters Elite can provide you software products and services that help you broaden your strategic visibility over your business operations, simplify and boost firm-wide compliance, and confidently take on the future.

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BENEFITS

- **Speed up everyday processes**, such as time recording, in both portal and mobile environments

- **Reduce time for training and adaptation and connect naturally** to how fee earners work because MatterSphere is embedded seamlessly within Microsoft Office

- **Increase efficiency and reduce redundancy** with the easy-to-navigate Command Centre

- **Overcome the challenges of siloed data** by providing real-time back office financial and reporting data to the front office

- **Simplify access** with a single login through MatterSphere, gaining instant access to 3E

3E INTEGRATION KEY FEATURES

- MatterSphere understands and respects 3E effective dating

- Standard 3E reports show real-time data in the MatterSphere Command Centre, including Matter Inquiry, summaries at the billing timekeeper level for hours and amounts, WIP, and net investment

- A simple modification allows hosting of any other 3E reports or processes in the MatterSphere Command Centre

- Client and matter information can be created and modified via MatterSphere, then passed through to 3E with a quick click of the mouse

- Powerful new matter intake capabilities of MatterSphere will intake information and automatically send it to 3E

- Time recorded through the MatterSphere Office-embedded time capture process passes through to 3E; ad hoc timecards created in MatterSphere also pass through to 3E

- Timecard integration respects matter-defined rules. For example, if Phase Task and Activity codes are required, they must also be entered in MatterSphere

- With 3E Design Gallery, you can publish files from 3E such as invoices to the matter in the MatterSphere DMS

- With 3E, Phase Task Activity codes from 3E are auto populated into MatterSphere

- Through the 3E Workspace Integration Framework data sync, you can make edits to clients and contacts in 3E, MatterSphere, and 3E Workspace, and the data is kept in sync

- Access your client and matter information and documents when on the go using MatterSphere in Workspace

- View 3E data in the MatterSphere Command Centre through 3E Workspace

ACCESS INFORMATION ON THE GO

- 3E Workspace allows lawyers to make the most of MatterSphere and 3E by providing access on the go

- Lawyers can get an integrated view of 3E and MatterSphere information, including clients, matters, tasks, and milestones using Workspace

- Mobile time entry through Workspace allows lawyers to track time on the go

- Workspace displays any time recording information taken in MatterSphere and sent to 3E

MatterSphere information appears in the 3E interface giving a more complete view of clients and matters.

To learn more about 3E MatterSphere integration or for a global list of office locations, visit **elite.com/3e/matter-management**.

The intelligence, technology and human expertise you need to find trusted answers.

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