Phoenix MatterView

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Phoenix MatterView empowers organisations to actively collaborate on content and view key data within the iManage document management system. MatterView's unique dashboard design displays crucial information, such as financials, key dates, and CRM, by seamlessly integrating with any SQL-based software solution, including Elite Enterprise and 3E, Aderant Expert, InterAction, and numerous others.

MatterView can display such information as: matter summaries (e.g. client name and address, supervising partner, practice area, etc.); milestones and key dates, with scheduled reminders; core financials from your finance / practice management system; key contacts with email launcher; tasks and reminders; and, Client Undertakings.

Features

- Displays HTML-based dashboards directly within each iManage workspace
- Delivers real-time information from multiple systems into the iManage interface giving users a 'single pane of glass' to work in Replicate "Post-it" notes against matters for efficient collaboration
- Easily associate important notes with matters for enhanced collaboration
- Powerful task manager and notification engine
- Role based security driven from iManage or Active Directory
- Centrally managed from a web-based admin module with integrated help

- Quickly create your own views and reports on data from any external system
- Automatically create sets of tasks for a matter based on work type
- Easily assign tasks to matter team members triggering personalised notifications
- Easy sorting and filtering of information
- Personalised views of tasks and notes from a single report

Benefits

- Increases user efficiency and productivity
- Improve client service by providing instant access to information from multiple systems
- Increases user adoption and enhances the functionality of iManage
- Empowers users by giving them the ability to efficiently manage matters

- Quick and cost effective deployment delivers instant ROI
- Can be managed in-house without the need for programming skills
- Improve visibility across matters for partners and management

About Phoenix

Phoenix is a global technology business and market leader in Enterprise Content and Email and Document Management, serving more than 300 customers from offices across five continents with a 24 x 7 Service Desk. As the preeminent global iManage partner with extensive expertise in implementations, upgrades, training, development and support, Phoenix has developed numerous innovative products that help clients get the most from their iManage investments.