

Solution Accelerators

Workin *Legal* 365

Complementary to
Microsoft Dynamics 365

Designed for
Law firms



- ◆ Stakeholder management with roles on files and search for potential conflicts of interest
- ◆ Risk analysis questionnaires on customers and files
- ◆ Billing cockpit with adjustment management
- ◆ Timesheet entry
- ◆ E-Billing
- ◆ Set of complementary features to enhance the standard D365 Finance solution



Stakeholder management with roles on files and search for potential conflicts of interest

File management feature tailored to the specific needs of law firms in Microsoft Dynamics 365.

Additional feature for setting up and managing stakeholders by determining their roles in a file.

This feature is linked to a search for potential conflicts of interest, which enables you to identify any situation where your firm's interests could conflict with those of a client.

Benefits

Complementary features spreading stakeholders involved in a file

- Managing the ecosystem of stakeholders involved in a file
- Conflicts of interest are identified
- Files security and accessibility are guaranteed

Features

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| Management | Managing stakeholders and their roles on files, enables law firms to manage the completeness of their relationships with third parties. |
| Compliance | The search for potential conflicts of interest is an essential feature to ensure integrity and transparency in the representation of your customers, thus avoiding any potential conflict of interest. |
| Security | XDS framework for files, enabling data to be stored indefinitely in a centralized, secured manner, while remaining available to all parties. |



Risk analysis questionnaires on customers and files



Only created for law firms, this feature complements file management in Microsoft Dynamics 365.

Law firms are required to carry out customer written assessment of business risks.

This feature also includes a compliance process when a file is opened.

Benefits

File management takes into account current legal obligations.

- ◆ Risk analysis questionnaires structured for greater compliance
- ◆ File opening process review workflow ensures transparency, efficiency and effective management throughout the legal file lifecycle

Features

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| Risk assessment | Risk analysis questionnaires on customers and files makes it easier for you to comply with current regulations. |
| Time saving | The review workflow for the file opening process ensures compliance and saves time for all involved parties. |



Billing cockpit with adjustment management



This feature centralizes the invoices management for optimized processing and monitoring.

Featuring billing line grouping and advanced discount rule management, this feature enables law firms to efficiently manage their multi-dimensional discount programs, minimizing errors and reducing processing times.

Benefits

Real-time overview of the billing process

- ◆ Efficient billing process
- ◆ Improves efficiency and maintains compliance
- ◆ Automates complex financial processes

Features

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| Comprehensive overview | The Billing cockpit provides an overview of all billing-related activities, enabling efficient processing and monitoring. |
| Prioritization and distribution | Allows invoices to be classified so that tasks can be allocated efficiently to team members. |
| Follow-up | Management and monitoring of actual invoiced rates aligns invoicing and fee valuation monitoring. |
| Grouping | Flexible management of grouping and adjustment for invoice lines. |
| Discount Rules | Advanced management of discount rules automates complex processes between stakeholders. . |
| Analysis | Advanced management of discount rules provides a precise view of the effectiveness of discount programs. |



Timesheet entry

The benefits of this feature go beyond more accurate invoicing, as it enables to gain a more detailed understanding of the day-to-day work of employees.

This feature can also be used to assess the tasks volume that are not assigned to any particular file, as well as periods of under- or overwork. You'll have a clearer vision on how your law firm operates and what you need to do to improve the management of your business.

Benefits

An innovative solution tailored to the specific needs of your law firm

- ◆ Guaranteed billing transparency
- ◆ Better evaluates working hours to optimize billing and to adjust rates
- ◆ Facilitates processes analysis to identify areas for improvement

Features

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| Time entry and integration | Time entry and integration enables employees and the whole firm to gather information on productivity, enabling them to optimize resource allocation. |
| Time entry follow up | Tracking time entered by employees enables you to analyze and optimize time spent working on files. |
| Status period of time entry | Possibility of blocking time entry for a given period and/or shifting time entry to a previous period. |
| Timesheets mass approval | New screen for viewing and checking timesheet transactions of employees working on files, and for managing mass approvals. |



E-Billing

This feature digitizes the creation, issue and storage of invoices via a dedicated digital platform.

“LEDES” structured invoicing is beneficial for law firms, providing a clear understanding and review of detailed tasks and expenses, while enabling invoices to get paid faster.

It guarantees the reliability, security and speed of your billing.

Benefits

E-Billing offers significant benefits in terms of efficiency, security and compliance.

Features

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| Reliable invoicing | Automated invoicing processes reduce human error associated with manual data entry. |
| Improved BFR | Digital invoicing reduces invoice approval and payment times. |
| Savings | Savings on printing, mailing and storage costs are a real benefits. |
| Time saving | Enables faster invoice processing, helping to reduce payment receipts times. |
| Legal Compliance | E-Billing is required by more and more international groups. |
| Configuration | Editing descriptions and managing forbidden words |



Additional features

A set of complementary features to enhance the standard Microsoft Dynamics 365 solution, based on WorkinWith's experience in implementing numerous projects.

Features

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|-------------------------------|---|
| Labels personalization | Customizable labels to match the terms used by employees, making the entire solution easier to use. |
| Analysis | Data model provisioning for BI |

Benefits

An innovative solution tailored to the specific needs of your law firm

- ◆ Data available to generate any type of reports

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