

Solution Accelerators

Workin *Legal* 365

Complementary to
Microsoft Dynamics 365

Design for
Lawyers



- ◆ 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
- ◆ Time 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 project.

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.

Features

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.

Benefits

Complementary features spreading stakeholders involved in a project

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



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 and 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

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 control.

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

Comprehensive overview	The Billing Cockpit provides an overview of all billing-related activities, enabling efficient processing and control.
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.



Time 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 attributable to any particular file, as well as periods of under- or overwork. You'll have a clearer vision of 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 adjust rates
- ◆ Allows to analyze processes and identify areas for improvement

Features

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 of time entry periods	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 controlling 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 be paid more quickly.

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

Benefits

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

Features

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



Additional features

A set of complementary features to enhance the standard Microsoft Dynamics 365 solution, based on WorkinWith's experience with numerous law firms.

Features

Labels translation	Customizable labels to match the terms used by employees, making the entire solution easier to use.
Analysis	Provision of the data model for BI

Benefits

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

- ◆ Data available to generate any type of report

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