

USERGUIDE

This document is an extract of the CoreMatter User Guide, for the full report, please contact Business Network Solutions Singapore at danielchan@bnsasia.biz.

COREMatter User Guide Version:

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Last amended by: Joshua Tan



USERGUIDE

INTRODUCTION

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- USER ROLES

What is COREMatter?

COREMatter is a Practice Management System ("PMS"), Accounting and Billing system, developed specifically for SME legal firms.

It is a industry standard based, cloud-based solution, developed on the Microsoft Azure platform, providing access for its users, anywhere and at anytime.

COREMatter incorporates client & office accounts, capturing activities and disbursements on a timely basis whilst providing real-time financial health of the practice for the Legal Partners.

* Do note that the User Guide by default, is based on a user with full Administrator access rights. Where applicable, the guide will specify sections typically used by certain user roles. Please refer to the following page for a typical firm user-roles set up.

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COREMatter Guide - User Roles

User Roles

With regards to internal security, COREMatter gives and limits access to certain sections and screens the various roles and functions in your firm.

The below is a guide of the typical roles and functionalities for legal firms. Throughout this guide, do note of assistant icons to identify typical user of a functionality. These will be located at the top right of each page.

Your COREMatter contact will assist in customizing the modules / privileges for your firm during the pre-deployment phase. Subsequently, a user with [Administrator] access will be able to make amendments should the firm's needs change over time.

Do note that the typical functions of each role are non exhaustive.

COLOR CODE:				
USER ROLE:	ADMINISTRATOR	PARTNER	SOLICITOR	ACCOUNTS
TYPICAL FUNCTIONS:	- Bank, Tax and Productivity Reports	- Client Maintenance	- Input of Activities / Disbursements	- Cash and Bank Accounts
	- Dashboard	- Matter Maintenance	- Invoicing	- General Ledger
	- COREMatter Settings	- Matter Workspace	- Disbursement Vouchers Creation	- Other Journals
	- User Roles Maintenance	- Business Operations Related Reports	- Suppliers and Purchases	
ICON:	Admin	Partner	Solicitor	Accounts

What is on the home page? (1/1)

home conflict check clients matters unbilled items memo tax invoice vouchers suppliers banks ledger reports settings

Admin Partner Solicitor

2

Layout

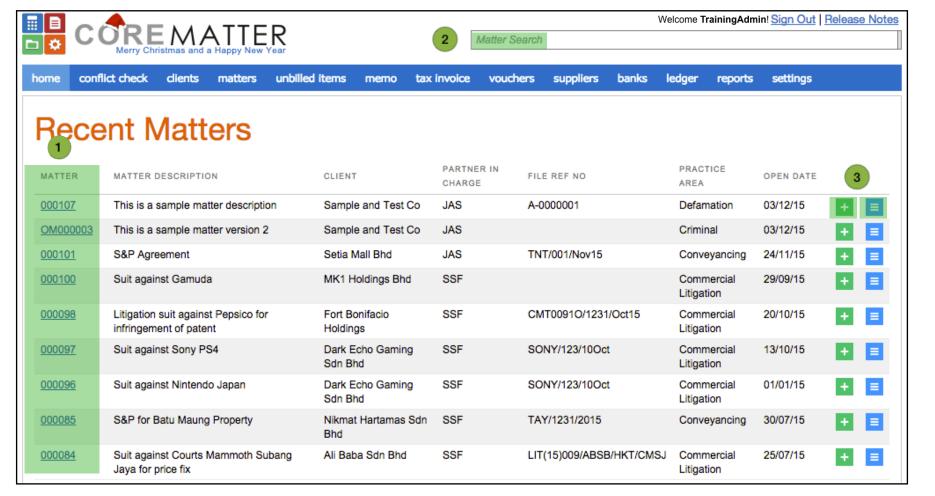
Once you have logged in, you will be directed to the [Recent Matters] page, which displays the last 10 matters that the user has been working on.

This allows faster access to your current work without having to search.

2 Matter Search

The 'Matter Search' bar is a comprehensive search bar allowing you to quickly search for your matter file based on the matter's:

- (1) Matter No.
- (2) Matter Description
- (3) Client Name



3 Shortcut Icons

The symbol allows a user to quickly create a new activity to capture and log in time spent by a lawyer on a particular activity for that particular Matter.



Clicking the symbol allows a user to create a memo in relation to that Matter. Within the creation, a user is able to add email reminders for future reference.

Create Memo				
Date *	07/12/15			
Matter *	000107 - A-0000001 Sample and Test Co This is a sample matter descriptior ▼			
User *				
Type *	Notes ☐ Email Alert ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐			
Description *	This is a sample description			
Submit Submit 8	Email Now Cancel			

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