



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.

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INTRODUCTION

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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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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 :	<ul style="list-style-type: none"> - Bank, Tax and Productivity Reports - Dashboard - COREMatter Settings - User Roles Maintenance 	<ul style="list-style-type: none"> - Client Maintenance - Matter Maintenance - Matter Workspace - Business Operations Related Reports 	<ul style="list-style-type: none"> - Input of Activities / Disbursements - Invoicing - Disbursement Vouchers Creation - Suppliers and Purchases 	<ul style="list-style-type: none"> - Cash and Bank Accounts - General Ledger - Other Journals
ICON :				

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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.

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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

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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.

MATTER	MATTER DESCRIPTION	CLIENT	PARTNER IN CHARGE	FILE REF NO	PRACTICE AREA	OPEN DATE
000107	This is a sample matter description	Sample and Test Co	JAS	A-0000001	Defamation	03/12/15
OM000003	This is a sample matter version 2	Sample and Test Co	JAS		Criminal	03/12/15
000101	S&P Agreement	Setia Mall Bhd	JAS	TNT/001/Nov15	Conveyancing	24/11/15
000100	Suit against Gamuda	MK1 Holdings Bhd	SSF		Commercial Litigation	29/09/15
000098	Litigation suit against Pepsico for infringement of patent	Fort Bonifacio Holdings	SSF	CMT0091O/1231/Oct15	Commercial Litigation	20/10/15
000097	Suit against Sony PS4	Dark Echo Gaming Sdn Bhd	SSF	SONY/123/10Oct	Commercial Litigation	13/10/15
000096	Suit against Nintendo Japan	Dark Echo Gaming Sdn Bhd	SSF	SONY/123/10Oct	Commercial Litigation	01/01/15
000085	S&P for Batu Maung Property	Nikmat Hartamas Sdn Bhd	SSF	TAY/1231/2015	Conveyancing	30/07/15
000084	Suit against Courts Mammoth Subang Jaya for price fix	Ali Baba Sdn Bhd	SSF	LIT(15)009/ABSB/HKT/CMSJ	Commercial Litigation	25/07/15