pryme

PRYME MATTERS

It's all about clients and matters

Practice & financial management all-in-one, bringing processes, people, and data together. **End-to-End**.

Tailored for law firms, accounting firms and other matter-based businesses looking to streamline and digitise their business through an integrated end-to-end industry solution. **From intake assessment to revenue recognition**.

Pursuing a straightforward intake assessment?

STRAIGHTFORWARD INTAKE ASSESSMENT

Benefit from digitised compliance assessment in ONE single legal practice management system throughout the matter lifecycle.

As an integral part of your client intake process, from the onboarding to the ongoing due diligence, maintain full traceability for regulatory compliance. Keep all concluded assessments for later compliance verification.

Simplify client intake, whether integrated with any **Know Your Client (KYC)** software or processed manually. Make the various stages of the assessment and the ongoing due diligence an integral part of your intake process. Easily monitor changes to your existing clients.

Efficiently check for **conflicts of interest (COI)** by searching any data and obtaining a list of possible matches. Assess and update each record before making your final COI assessment.

" A better client and matter intake process which includes a thorough COI and KYC check."
Lena Broman, CFO at DLA Piper

Is your matter setup too time-consuming?

MATTER SETUP IN LESS THAN A MINUTE

Easily create a **matter compliant with Know-Your-Client and Conflict-of-Interest** approval processes.

Ensure the **necessary matter data** is captured and entered in a consistent manner, improving the quality of the data. This makes it **easier to manage and track matters**, allowing Finance to focus on their core responsibilities. Invest your time and effort in more profitable tasks than setting up a matter.

Ensure **PEPPOL-based task structure, pricing, client and matter acquirers, deadlines, and associations** to create compliant matters.

"Ensure consistency across your clients."
Sean Looby, Head of Operations at Cafico International

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Overwhelmed with time entry issues?

EASY TIME ENTRY DESPITE NUMEROUS ASSIGNMENTS

Never miss time entries again by using the **start/stop time tracker** or updating your timesheet with booked tasks in just one click.

Easily capture and record time as work is completed. **Automatically generate time records** for your parallel 4-10 different assignments worked on daily.

Input time **directly in Outlook** to submit the assignments you have completed.

Receive **briefing emails with the current timesheet** status for effortless review and prompt submission.

Minimise the time needed to include **value-adding texts to your invoice specifications by using pre-defined descriptions and description rules**. Provide, in doing so, a more detailed account of the work performed and contribute to a clear understanding of the tasks completed to clients. Ensure proper billing and invoicing for the work done.

"People started entering time even before the training."
Sean Looby, Head of Operations at Cafico International

Why is billing matters so inefficient?

COLLABORATIVE VALUE-BASED MATTER INVOICING

Streamline your matter billing to **free up resources** and allocate them towards billable client work. Your matter invoicing is now **fully integrated with Finance**.

Ensure quality through **pre-defined descriptions and approvals**. Reduce the time span needed to control and adjust the large number of entries and long descriptions.

Adjust invoiced amounts by obtaining **pro-rated calculations and re-evaluations based on performance** when necessary. Distribute the resulting amount among the contributing resources.

Calculate **Work in Progress (WIP)** automatically and post it to the General Ledger (GL) for a correct income statement at the click of a button. In addition, obtain a detailed WIP report for full audit trail.

"The system can handle the split of the cost between several receivers."
Marcus Eyre, IT Manager at DLA Piper

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Lack of insights to take data-driven decisions?

EASY DATA ACCESS & INSIGHT FROM ONE SOURCE

Take data-driven decisions based on detailed and trustful information from ONE source with drill-down functionality.

Have an overall overview to identify areas of improvement rather than having your data all spread over. Monitor risks and apply countermeasures if needed.

Visualise insights into the financial and operational health of your organisation on demand with Power BI reports. Find the report that better helps you thrive your law firm.

Obtain **reports and dashboards** on matter profitability, client engagement, fee earners performance, etc. to have **full business insights into your law firm**. Identify the areas that are performing well, and also the ones that are not, and take corrective actions if required.

"One application, one source of truth."
Marcus Eyre, IT Manager at DLA Piper

Feature highlights

INTAKE ASSESSMENT

- Compliance Assessment
- Conflict of Interest Check
- Know-Your-Client Check
- Know-Your-Client API
- Due Compliance Integration
- Legal Entity Service API

MATTER SETUP

- Quick Guide Setup
- Sales Price Templates
- Deadlines
- Team Members
- Referrals
- Approval workflow

TIME & EXPENSE ENTRY

- Time Tracker Start/Stop
- Time entry in Outlook
- Time entry in Mobile
- Extended Descriptions
- Standard Time Descriptions
- Time Description Rules
- Timesheet Briefing Email
- Expense entry in Mobile
- Attach receipts in Mobile
- Approval workflows

INVOICING

- Invoicing Creation
- Invoicing Status
- Invoicing Comments
- Prepayments
- Invoice Revaluation
- Excess Time Billing
- Dynamic Invoice Layout
- Invoice Specification
- Invoice Sending Profile
- Work-In-Progress (WIP)

MANAGE & CONTROL

- Associations
- Securities
- Client Funds
- Client & Matter Acquirers
- Closure in bulk
- Move entries
- Fee earners commission
- Acquirer commission

INSIGHTS

- Client Engagement Report
- Resource Time Analysis
- Resource Amount Analysis
- Resource Expected Achievement
- Timesheet Status Analysis
- Partner Liquidity Analysis
- Commission Analysis
- WIP Detailed Report
- WIP Summary Report
- Power BI Reporting Package