

Timekeeping is the Lifeblood.
Billing is the Pulse.

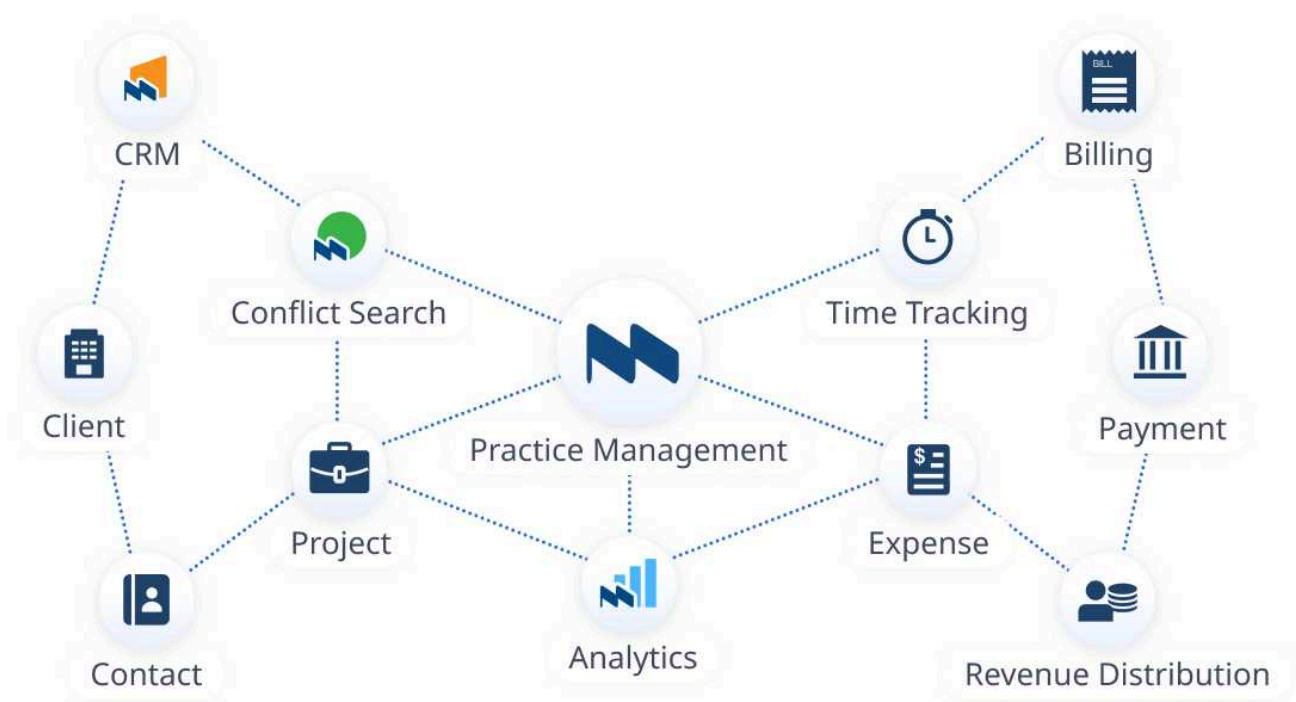
Practice Management For Professionals

MATTEROOM | <https://www.matteroom.com/>

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Specialized for Professional Teams The key to operational excellence

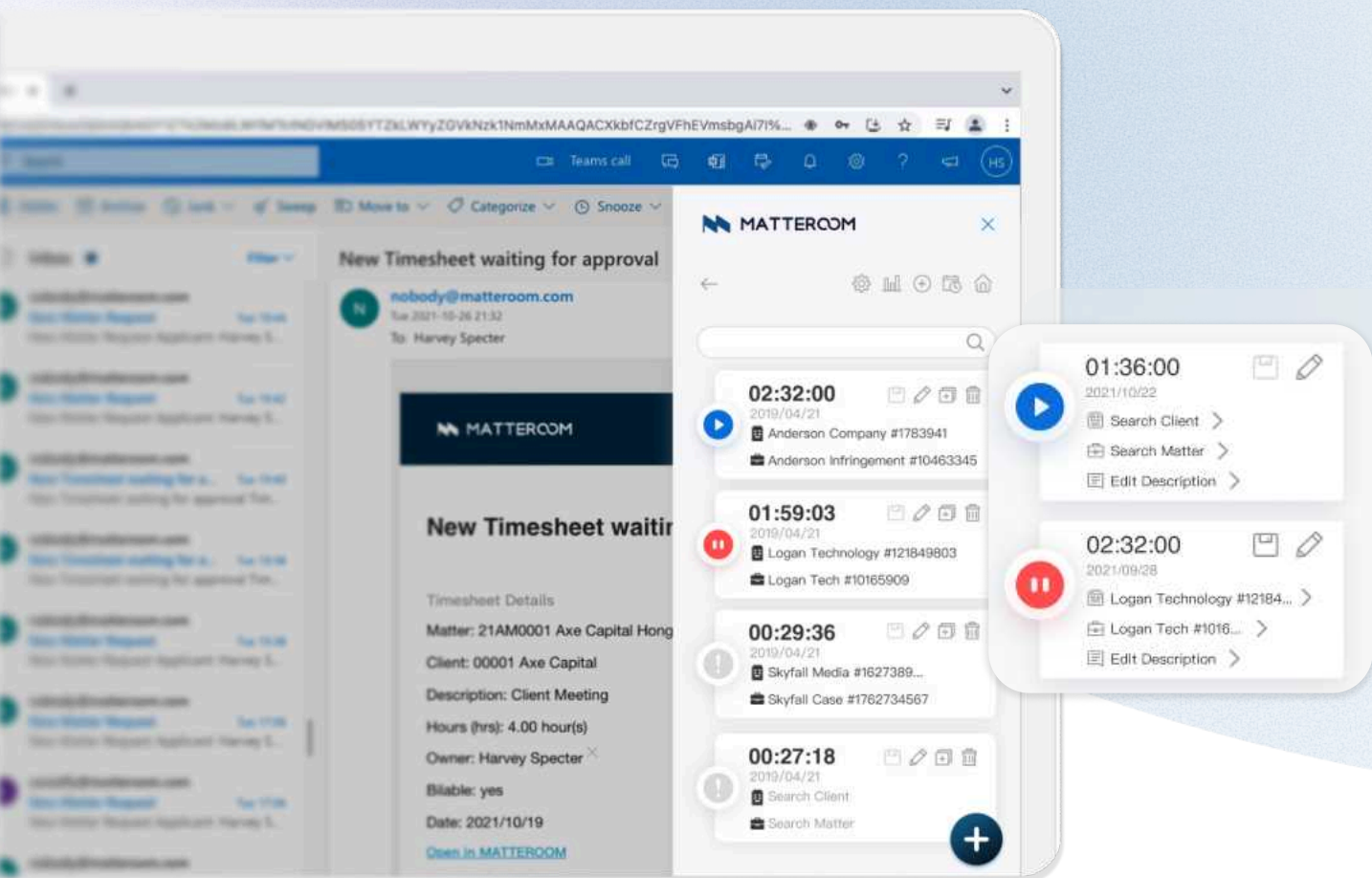


MATTEROOM is a scalable practice & finance management SaaS designed for professional teams, MATTEROOM evolves with your business, optimizing operations across Legal, Accounting, Engineering, Marketing, and Consulting.

From Time & Expense tracking to Billing and Finance management, MATTEROOM enables businesses to simplify their daily operations. Our Analytics provides actionable intelligence to firm leaders by offering real-time data insights through dozens of analytics reports. We prioritize user experience and affordability, designed with the flexibility to meet the unique needs of companies of all sizes, from small firms to global enterprises.

Clocking & Timesheet

Our clocking feature is device-independent and works effortlessly across platforms, making it easy for timekeepers to log their hours and stay on top of their timesheets.



Work Anytime & Anywhere

Timekeepers can clock anywhere and anytime using our web/mobile app or Office Add-on. The clocking feature is device-independent and works across platforms.

Auto Multi-Device Syncing

While you are traveling or visiting clients, start the clocking from mobile app is just one click from your phone. The time entries are auto synced between all devices in real time.

Billing Management

MATTEROOM allows management to track each project/matter's financial status in real time, along with key performance indicators such as available budget, the ratio of billable to non-billable hours, aging receivables, and more.



Bills & Payments



Multi-currency



Smart Billing

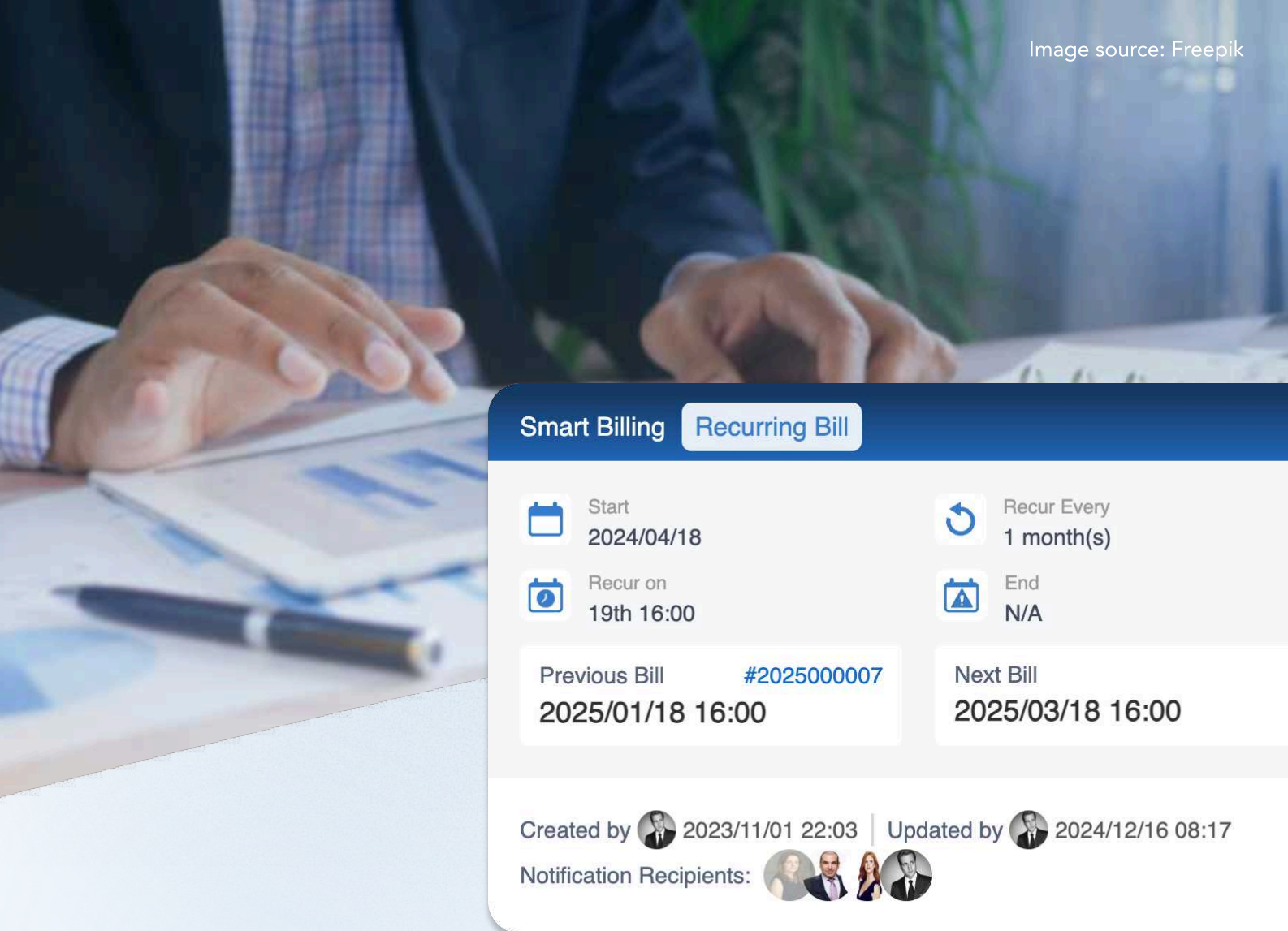
Prebill Tracking

The Prebill feature helps you quickly track which matters still have billable hours, or disbursement available to bill. And provides a quick one-click billing function.





Multi-currency Support


Experience the ultimate multi-currency solution for simplified billing, efficiently handling all currency conversions like a breeze. We automatically convert all items into the billing currency.




Smart Billing **Recurring Bill**

 Start
2024/04/18



 Recur on
19th 16:00


 Recur Every
1 month(s)

 End
N/A

Previous Bill **#2025000007**
2025/01/18 16:00

Next Bill
2025/03/18 16:00

Created by  2023/11/01 22:03 | Updated by  2024/12/16 08:17

Notification Recipients: 

Smart Billing – Cut Costs by 30%

Once set up, Smart Billing takes care of everything. It streamlines your billing cycle with automated billing process to reduce billing turnaround and make billing more efficient for you. No more chasing timesheets or correcting invoice errors. Just streamlined, transparent billing that gets you paid—faster and smarter.

Billing Audit Trail

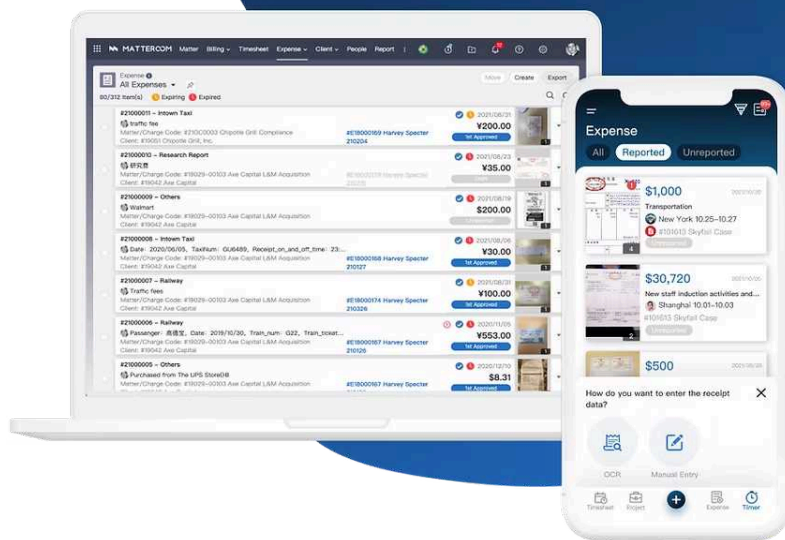
Ensures transparency and accountability by keeping a detailed record of all billing activities. It tracks who made changes, what changes were made, and when they were made, providing a clear and traceable history. This helps firms optimize their billing processes and make informed decisions.

Expense Management

Go paperless and hassle-free data entry with Matteroom's expense and disbursement management module! Simplify your process by snapping a photo of your receipts, and our system will do the rest. With our built-in business rules and instant notifications, you can ensure your billable expenses are promptly processed without any delays.

Cutting-edge AI Technology

This module offers Smart AI Add-on, whereas digital photo receipts can be auto-recognized and populated into the system, saving hours on boring data entry.



Streamlined Approval Process

Our Single Expense Rejection also makes the approval process much more efficient. Authorized users can approve a single expense or the whole expense report via our App, too.

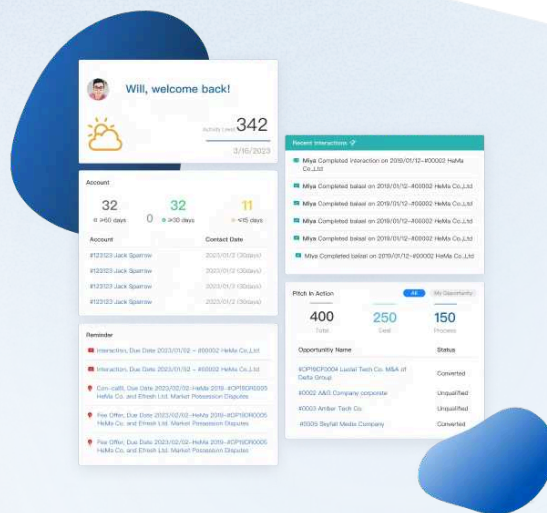
Expense and disbursements management is no longer a painful process because expense submission and approval can all be done via the app, reducing overhead significantly and saving your administrative staff from the physical "Paper Ocean".

Customer Relationship Management (CRM)

Our design ensures all data to be analyzed from different angles in real-time, and increases the cross-selling opportunities. A client-centric CRM simplifies the complex process into only two stages. First, it tracks all customer/contact activities incorporating billing information, like payment terms & discount levels to determine each customer's behavior. Secondly, it tracks profits and other financial contributions to present your customer value digitally.

Work Anytime & Anywhere

This notification framework not only sends emails but popular social collaboration networks are connected to help professionals avoid missing any critical updates.



Cross-selling Across The Firm via Teams

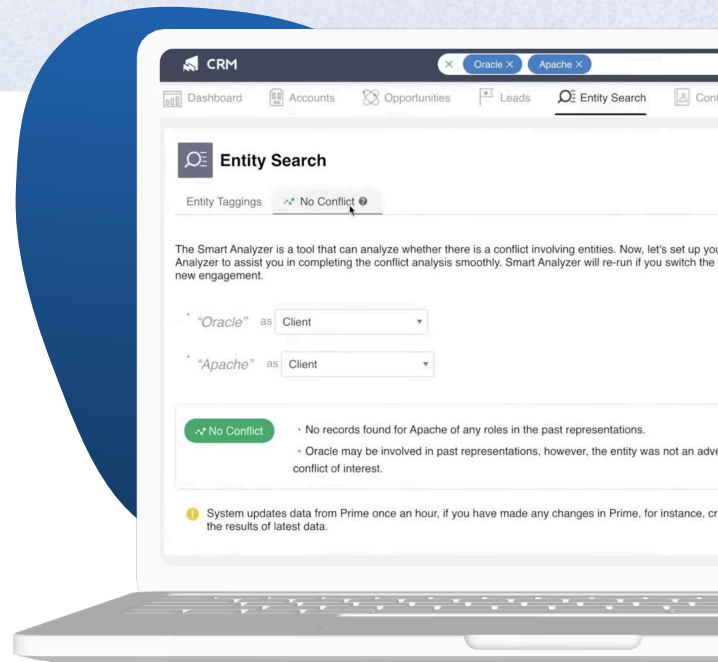
MATTEROOM CRM helps the partners determine and record all of the client's needs to exercise cross-selling different services when the opportunity arises. Our CRM helps firms track internal referrals.

Conflict Search & Matter Intake

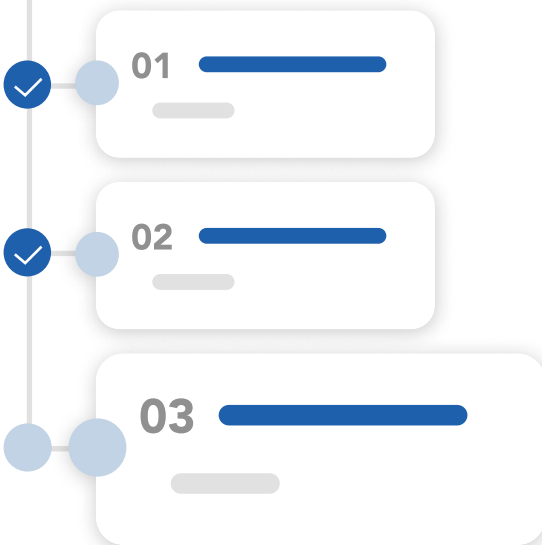
Conflict Search indexes Practice Management data, providing powerful discovery capability to quickly identify conflicts by context. The system also provides various configurations to ensure the best practices are adopted by your firm.

AI-Powered Pre-Search

MATTEROOM's Pre-Search, powered by Azure OpenAI, auto-tags entities and analyzes context to identify potential risks and conflicts early. It streamlines intake and KYC processes while supporting compliance with faster, more intelligent conflict checks.



Begin



Powerful Flow

Our strong process management system is capable of handling complicated approval logic and scheduling. All user interactions are fully logged to provide a full audit trail. This vital capability can also be easily scaled for large size firms.

Analytics

The intuitive analytics widgets can be presented in real-time, so key stakeholders can instantly appreciate the performance of an individual, a team, and financials of a single matter, practice team, or the whole firm. MATTEROOM provides Analytics against the ONE backend eliminating silo data to drive accurate business insights. By gathering the data of each dimension, management can comprehensively view the firm's operation profile. The more you know, the more you can act. The same engine also supports Conflict Search and can be extended into a full-blown Data Warehouse.

AR Aging Report

Cash Flow Report

Utilization Rate

Timesheet Summary

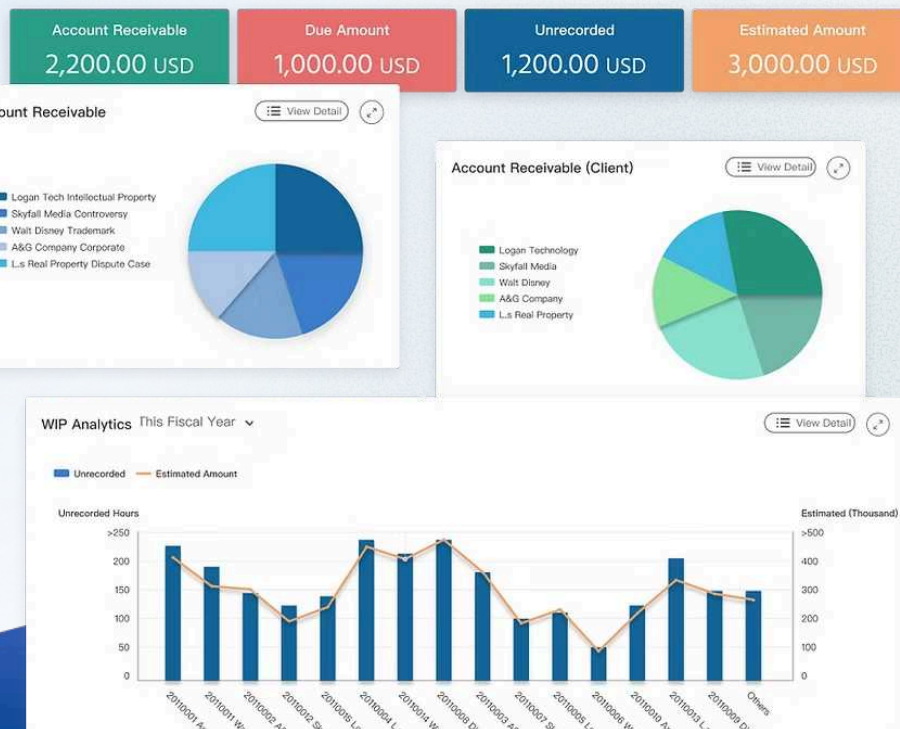
Missing Timesheet

Revenue Report

Fee Earner Details

Invoice Detailed

and more.

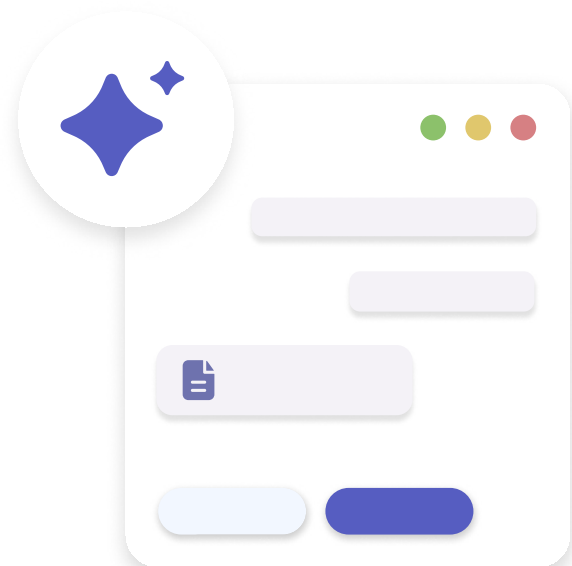


Integration with Microsoft 365

Seamlessly connects with Microsoft 365 to enhance email and document management, keeping your operations organized and efficient.

Minimum Training Efforts with Seamless Workflows

Integrates with OneDrive, Copilot, and Teams to streamline legal work, no setup or steep learning curve. Legal professionals can manage documents, get real-time matter intake alerts, and approve disbursements or bills with a single click, all within one workspace.



Turn M365 into a Premier Legal Platform

MATTEROOM refines Microsoft 365 to meet legal best practices, creating a premier platform for case, document and knowledge management with Planner, OneDrive, and Copilot.

Seamlessly Integration with the World's Most Powerful Softwares

Building a strong technology ecosystem and improving workflow with various third-party applications integrations.

Document Management



Our solutions are highly integrated with the world's leading document management systems. Single-click in MATTEROOM will automatically create a file workspace for the corresponding project in the document management system and fully synchronize member permissions.

Tool Application



Our solutions integrate the world's most advanced tool applications. Eliminate the inconvenience of frequent platform switching. No need to search and switch, make your work more efficient and professional.

Explore MATTEROOM Now

Choose MATTEROOM with Google Workspace or Microsoft 365 to have your operation in 24 hours.

Professional

from **\$39** USD

user/month

- Expense & Reimbursement Management
- Advanced Billing Management
- Multi Offices
- MFA using Microsoft or Google Authenticator
- iManage Connector
- NetDocuments Connector
- Mobile App
- +\$10 Advanced CRM
- +\$10 Conflict Check Express

Premium

from **\$59** USD

user/month

- Everything in Professional
- Analytics
- Microsoft Office Add-in
- Smart Billing
- Advanced Tax Management
- QuickBooks Connector
- Private Key for all data encryptions stored in your own Azure KeyVault
- Full Transparent Database Encryption w/ Private Key
- Full Disk Encryption w/ Private Key
- Onboarding Training
- +\$10 Advanced CRM
- +\$10 Conflict Check Express

Enterprise

Contact Us

- Everything in Professional and...
- Conflict Search Legal Only
- Advanced Analytics
- Advanced CRM
- HR Management (Annual Review)
- Connector Customization
- On-site Training
- Data Migration Service
- Helpdesk & Managed Service

Want timekeeping that works as fast as you do – and billing that keeps up? Book a demo session with our local team: <https://www.matteroom.com/booking>

Want Timekeeping That Works As Fast As You Do – And Billing That Keeps Up?

[Book a Demo](#)

 **MATTEROOM** Pro is a DNA.

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