CorpIntake

A Matter Intake Application Tailored to your Needs

The Problem

Collecting information relating to client and legal matters when accepting a client case often involves multiple, disjointed applications (e.g., word processor) and outdated technology (hand-recorded notes). The result is scattered information across multiple files or programs, which slows down productivity while increasing administration costs.
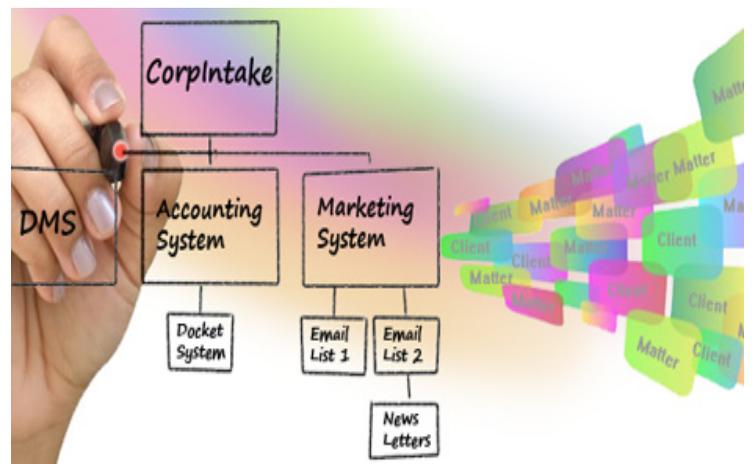
Our Solution

CorpIntake is a Web-based technology that captures client and matter related information in one sharable location. This expedites the process of checking for conflicts and opening a matter for a client because it allows users to view, manage, and receive information in real time.
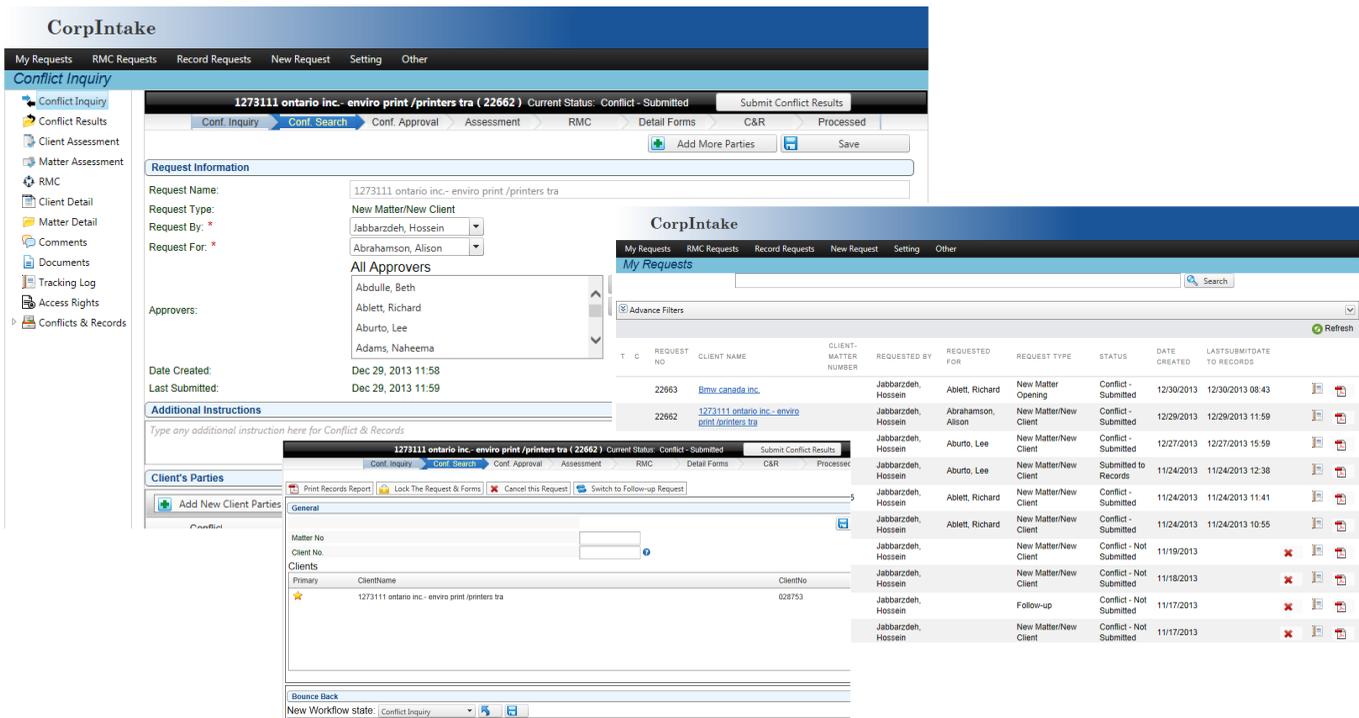
Every time a new client comes on board, or a new matter is opened for an existing client, detailed information needs to be collected about the client or case. This process usually involves collecting information at various stages, preliminary conflict searches, and approval by management committees; all which are difficult to handle manually.

CorpIntake automates the process of collecting client information, allows users to search for conflicts between parties, runs a built-in workflow for approval and is accessible anywhere with a secure connection. Partners, assistants and other users can enter information using predefined drop-down menus and customizable notes, and can receive real-time email notifications regarding status updates and requests.

Features & Advantages

- **Reduces conflict** approval time by providing a complete digital approval workflow process.

- **Increases revenue** by accelerating the file-opening process by collecting client and matter information via a web interface.

- **Enhances communications** by sending instant e-mail notifications to all stakeholders related to the matter.

- **Provides full audit and tracking** of all activities in the workflow.

- **Minimizes risk** by providing approval workflow process for the Risk Management Committee.

- **Integrates** with other applications such as SharePoint, DMS, and Records Management infrastructures.

- **Collects** the information through dynamic questionnaire forms that are tailored to your needs.

- **Reduces manual data entry** by pre-populating client and matter information.

- **System properties**:
    - Accessible via browser (no local installation required).
    - Built on latest .Net Framework technology.
    - Integrates with accounting systems
    - Provides information for DMS (Document Management Systems) to automatically generate workspaces

Learn more at www.PaayaTech.com/CorpIntake

About PaayaTech

PaayaTech designs, develops, and supports custom applications and enterprise-wide solutions for companies of all sizes in different market sectors to dramatically enhance user experience, foster collaboration and increase business productivity.

• *CorpSync*: Our Web-based technology that automatically updates contact and personalized corporate information in Outlook, smartphones or any other mobile device that synchronizes with Microsoft Exchange.

• *CorpIntake*: Our Web-based technology that captures client and matter related information in one sharable location. This expedites the process of checking for conflicts and opening a matter for a client because it allows users to view, manage, and receive information in real time.

• *EPlus*: Our Web-based application which integrates with Thomson Elite and enables users to manage day-to-day financial activities more effectively and efficiently.

•*DocBuilder*: This Microsoft Word tool bar enables users to generate legal and professional documents more in a more efficient way.

We also provide technology-enabled services to solve complex problems, provide business intelligence, integrate internal systems into one platform, and other consulting services.

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