

LegalOne is an all-in-one, best-of-breed solution tailored for small and medium-sized Law Firms and Legal Services Providers who want to be prepared for next generation business models and ensure operational agility. Providing access to cutting-edge **Document and E-mail Management** capabilities – seamlessly integrated with **ERP** – **purpose-built for project centric businesses** – LegalOne allow you to work smart and grow profitability. **Work smarter – work connected!**

best-of-breed ✓

all-in-one ✓

rapid deployment ✓

fast results ✓



Integrated Client Onboarding, KYC/AML

Custodian Client Onboarding help you make the client onboarding process smooth, compliant, and automated. With Custodian Client Onboarding, you secure regulatory compliance while ensuring a great user experience. Our solutions deliver integration with leading information sources, supports digital signature solutions, and delivers a complete audit trail.

Client Onboarding & Matter Intake

- **Smooth onboarding and intake process:** Workflow-powered and interactive client onboarding and matter intake process.
- **Improved data quality:** Seamless punch-out to external data sources (company info).
- **Compliance and control:** Integrated Conflict of Interest search.
- **Automate processes:** Automated creation of clients and matters in ERP and DMS.

Anti-Money Laundering Control

- **AML Risk Assessment:** Risk assessment with dynamic forms based on risk profile.
- **Client Interaction:** Interactive forms allowing clients to contribute and upload requested information.
- **Digital Signatures:** Allowing sign off using digital signatures



Intelligent Document and E-mail Management

iManage Work empowers you to create, manage and collaborate on documents and emails from anywhere on any device. Built from the ground up to meet the needs of professionals, iManage is relied upon by over 1 million professionals globally. Continuous user research delivers innovative new features that make iManage the system demanded by users not mandated by IT.

Document and E-mail Management

iManage Work 10 is the industry's leading document and email management application, empowering professionals to manage information more productively and securely.

- **Work productively:** Manage documents and emails more efficiently and intuitively
- **Work from anywhere:** Mobile first design lets users work remotely on any device
- **Find anything:** Smart search cuts through clutter to deliver personalized results
- **Work smarter:** Streamline everyday tasks like emailing documents and saving work to folders
- **Work seamlessly:** Integrations with Office 365 enable users to do more from inside the familiar Office and Outlook interfaces
- **Work safer:** Industry-leading security and governance ensures that iManage Work is the safest place to store information

Collaboration & Sharing

- **iManage Share** allows you to collaborate with clients and securely share files and documents.
- **Share directly from iManage Work:** Share, edit and collaborate on work product in a single interface.
- **Share files from your Outlook email:** Share files as secure links directly from Outlook.
- **Work smarter and faster:** Automatically create new workspaces and add collaborators. Automate tasks like metadata scrubbing and file uploads.
- **Secure firm-branded web portal in a snap:** Give colleagues access to documents from a single responsive interface on phone, tablet or desktop, branded with your firm logo.
- **Know what is shared and with whom:** Secure and governed-shared workspace inherits security from the project in iManage Work. Full audit trail and supervisory reporting.

ERP purpose-built for Project Centric Businesses

Deltek Maconomy Essentials provide comprehensive out-of-the-box ERP capabilities – purpose-built for project-centric businesses. Leading Law firms, PSOs and other project-based businesses in the Nordics and across the world use Deltek Maconomy to connect and automate the project lifecycle that fuels their business.

Client Centric Focus

- **Full client overview:** Client workspace with flexible reports providing full client engagement control – projects, billing, profitability etc.
- **Automated and compliant client onboarding:** Client onboarding through the fully integrated LegalOne Client Onboarding Application.
- **Embedded conflict search:** Embedded conflict search – related parties.

Financials

Financial efficiency

- **Flexible billing processes:** Workflow-supported billing processes, allowing de-centralised billing on project or client level.
- **Smart cash collection:** Workflow-supported cash collection processes.
- **Connectivity for electronic billing**

Financial control

- **Automatic revenue recognition:** Fully automated revenue recognition – based on time and material or progress evaluation for fixed price agreements.
- **Embedded vendor invoice management:** Allowing cost control and compliant approval processes.
- **Ageing control;** WIP, Account receivables, Account Payables.

Reporting and Analytics

- **Multidimensional:** Multidimensional accounting model pre-defined for project centric businesses.
- **Embedded reports:** Tailored for projects centric businesses.

Time and Expense

- **Time tracking:** Time can easily be captured on any device and at any time. (TIQ time optional for automated time tracking)
- **Expense capture:** Expenses can easily be captured on any device and at any time, with scanned receipts for approval.
- **Approvals:** Time and expense approval processes ensure full cost control and fast billing routines.

Matter Management

- **Smart matter creation:** Matter Creation through the fully integrated Client Onboarding App.
- **Flexible pricing:** Flexible billing rules based on time and material or fixed price agreements.
- **Time and expense capture:** Integrated and intuitive time and expense capture.
- **Flexible billing:** Workflow supported billing processes on matter or client level.
- **Full matter control:** Matter workspace with flexible reports providing 360-degree project profitability control.



Seamlessly Connected

Powered by **Custodian** – a Digital Services platform with advanced iPaaS capabilities – we ensure an integrated solution, where **iManage** for document management is seamlessly connected with **Maconomy Essentials** project lifecycle management and financials. Through industry-specific productivity apps – you can also add selected services to further boost efficiency.

Connected Workflows

The Custodian Digital Services platform ensures connected workflows between **Deltek Maconomy Essentials** and **iManage**.

- **Automatic workspace creation:** Workspaces are automatically created in iManage upon client onboarding and project creation in Maconomy
- **Meta data integration:** Workspaces are automatically populated with selected metadata from Maconomy, e.g., client name and number, project name and number, descriptions, status etc. This ensures a high degree of automation and control.



Add-on LegalTech applications

Additional LegalTech applications are available as add-ons, allowing you to ensure even smoother processes, increased efficiency, and an optimised digital ecosystem.

Automated Time Tracking



TIQ Time is an add-on to LegalOne – making time tracking amazingly easy.

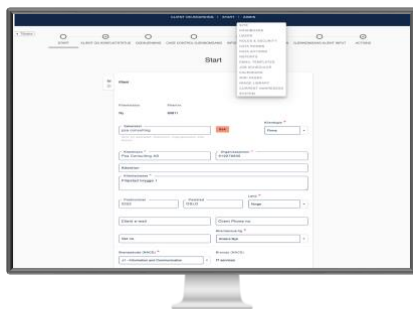
With TIQ Time, everything you do is automatically tracked and integrated into your timesheet (with your acceptance of course). But not only that – fuelled by machine boosted smartness – TIQ helps you with consistent narratives, smart glossaries, multilingual spell checking and to ensure compliance with billing rules defined.

Custodian Productivity Apps

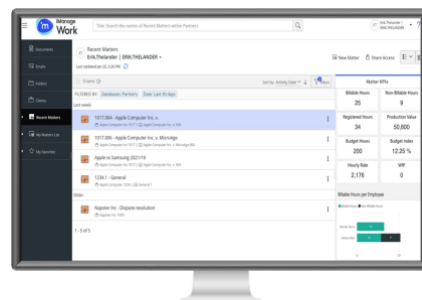


Custodian provides additional applications and microservices to further optimise your processes and accelerate efficiency. Amongst other, the following applications are available as add-ons.

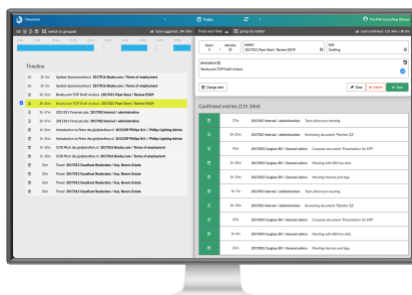
- Custodian Electronic Invoicing
- Custodian Leds invoice converter
- Custodian Digital Signature for iManage
- Custodian Smart Templates



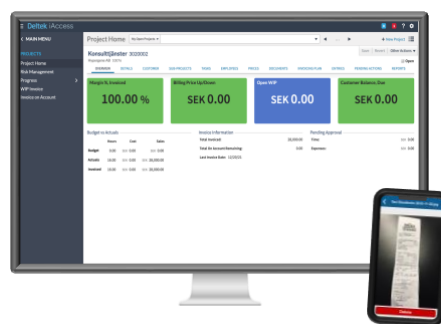
CLIENT ONBOARDING



DOCUMENT MANAGEMENT



AUTOMATED TIME TRACKING



FINANCIAL CONTROL

About PSA Consulting

PSA is a Nordic tech and expert advisory firm with offices in Oslo and Stockholm. We deliver cloud solutions and expert services to help law firms and other professional services firms with intelligent digital transformation. We deliver our cloud-based integration platform Custodian and purpose-built productivity apps and are also an official reseller and systems integrator partner of leading legal tech and PSO tech solution providers such as iManage, Deltek, Henschman, LawVu, Litera, Sysero and TIQ Time.

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