



Matter intake

Streamline your matter management



Streamline your matter intake and matter management.

Streamline your matter intake and matter management workflows with Custodian Matter intake seamlessly integrated with iManage. Business users can create new legal matters in the Matter intake portal, or directly from Microsoft Outlook. Matters can be assigned to legal counsels either automatically based on rule-based workflows, or through an intake queue where individual matters can be triaged and assigned.

Save time, ensure compliance, and enable seamless collaboration across the organisation by unifying matter intake, matter management and contract automation.

What is PSA offering?

- > Flexible matter intake processes
- > Seamless iManage integration (Cloud/On Prem)
- > Use Smart Hub inside iManage for transparency
- > Add contract automation powered by Sysero
- > Add Smart Templates for template management



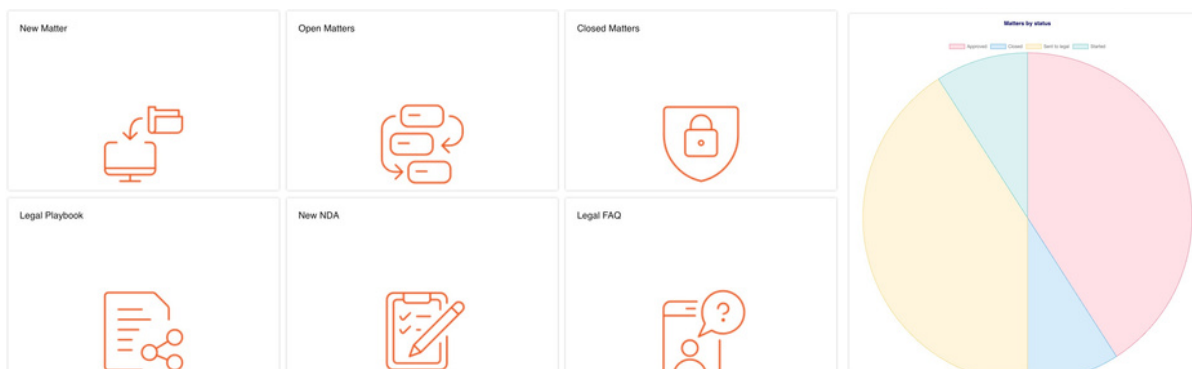
psasolutions.com contact-se@psasolutions.com



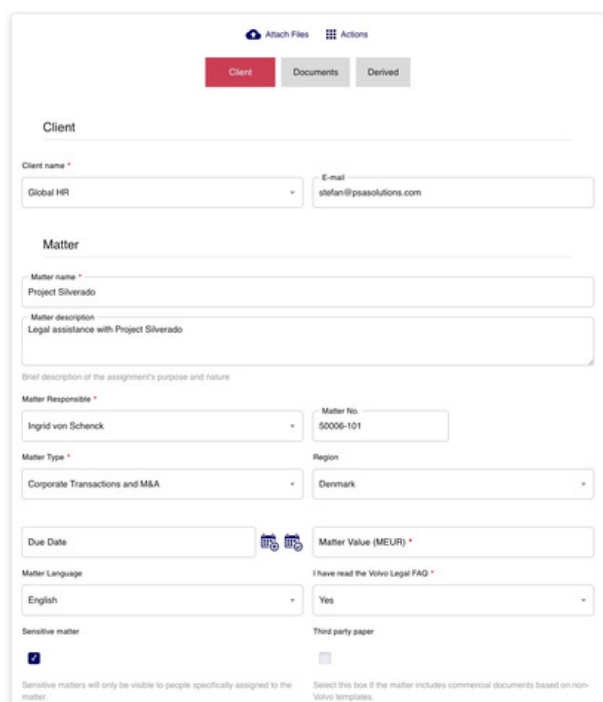
The European legal tech and integration experts

Matter intake portal for business users

The matter intake portal provides business users with a unified legal front door for matter management, legal information and self-service applications (e.g., an NDA automation app).



Seamless and transparent matter intake and matter management



The solution offer flexible intake forms and workflows to make sure it can be optimised to the requirements of any in-house legal team and their internal and external stakeholders.

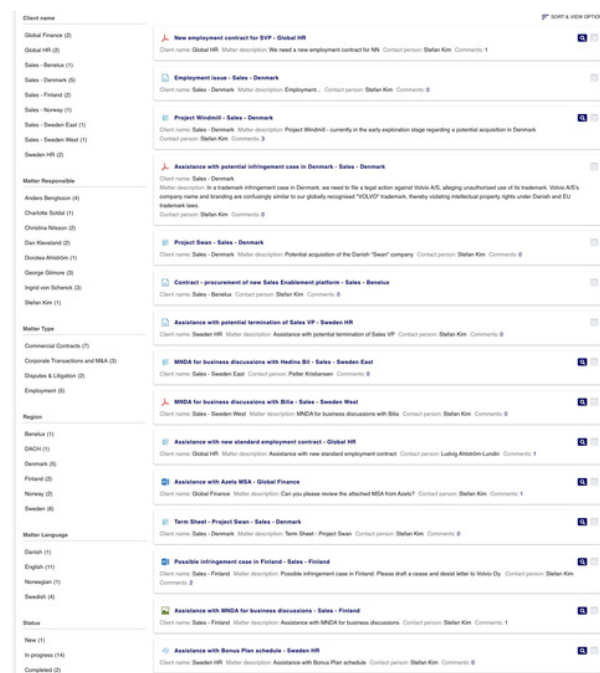
Matters can be assigned to legal counsels either automatically based on rule-based workflows, or through an intake queue where individual matters can be triaged and assigned.

Business users can check status on their own matters in real time, and add additional information if requested by Legal.

The legal team gets full overview over all active matters, and can move them along pre-defined workflows to ensure the best business outcomes for all stakeholders.

The solution offer dynamic filters, embedded chat functions, flexible and transparent reporting, and also integrated AI features powered by Open AI.

With the seamless integration to iManage, documents flow automatically over to iManage, and with Custodian Smart Hub, matter data from Matter intake is surfaced inside iManage.



Client name	Matter description	Contact person	Comments
Global HR (2)	New employment contract for SVP - Global HR	Stefan Kin	Comments: 1
Global HR (2)	Employment issue - Sales - Denmark	Stefan Kin	Comments: 0
Sales - Denmark (1)	Project Windfall - Sales - Denmark	Stefan Kin	Comments: 3
Sales - Denmark (2)	Assistance with potential infringement case in Denmark - Sales - Denmark	Stefan Kin	Comments: 0
Sales - Norway (1)	Project Swan - Sales - Denmark	Stefan Kin	Comments: 0
Sales - Sweden East (1)	Contract - procurement of new Sales Enablement platform - Sales - Sweden	Stefan Kin	Comments: 0
Sales - Sweden West (1)	Assistance with potential termination of Sales VP - Sweden HR	Stefan Kin	Comments: 0
Sweden HR (2)	MNDA for business discussions with Hestia BI - Sales - Sweden East	Stefan Kin	Comments: 0
Matter Responsible	MNDA for business discussions with Billa - Sales - Sweden West	Stefan Kin	Comments: 0
Anders Banghøj (4)	Assistance with new standard employment contract - Global HR	Stefan Kin	Comments: 1
Charlotte Sæter (1)	Assistance with Korea MSA - Global Finance	Stefan Kin	Comments: 1
Christina Nielsen (2)	Terms Sheet - Project Swan - Sales - Denmark	Stefan Kin	Comments: 0
Das Kleveland (2)	Possible infringement case in Finland - Sales - Finland	Stefan Kin	Comments: 2
Denise Andersen (2)	Assistance with MNDA for business discussions - Sales - Finland	Stefan Kin	Comments: 1
George Sjöman (2)	Assistance with Bonus Plan schedule - Sweden HR	Stefan Kin	Comments: 0
Ingrid von Schenck (2)			
Stefan Kin (1)			