MatterSphere Key Dates

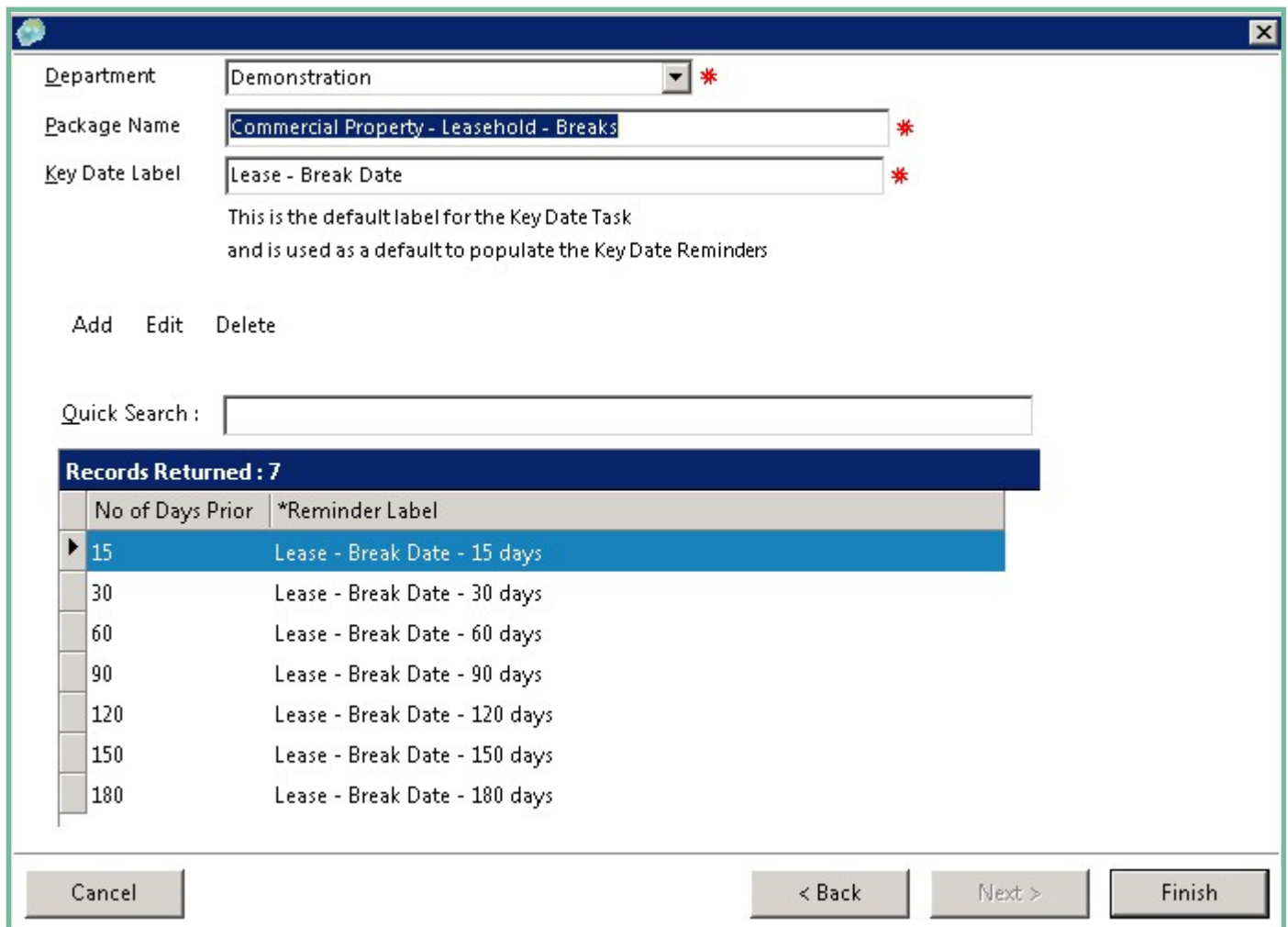## Extended Date Tracking & Team Management Functionality

Module Overview

Fusion's Key Dates is an add-In module that allows employees to enter and manage important Key Dates across personal caseload, and to manage them from personal, team and firm-wide perspectives.

Extended Key Dates Functionality

The software improves visibility and management of Key dates with the following features:

- **Key Dates -** Shows all Key dates against the individual matter

- **Supervision -** Reminder emails automatically produced to Supervisors

- **Management -** Reminder emails automatically produced to Case Handlers

- **Key Dates Packages -** Easy production of a key dates package to set several reminders prior to the key date deadline.

Compliance Reporting & Management

- Allows **Managers** to view and manage all Key Dates within department

- Assists **Compliance Officers** to easily view firm-wide compliance levels

- Allows tracking of completed key dates reminder tasks

- Allows for supervisory management of key dates against matters

Example of Supervisor Email Alert

Mon 26/06/2017 16:26

KeyDateAlerts <ctrothfusion@gmail.com>

Supervisor Alert for Hearing Date - 18 Jul 2017 - 101130/5 - Miss J Astbury

To ✅ Chris Troth

Key Date Reminder Alert for Supervisor

Fee Earner	Chris
Matter No	101130/5
Client Name	Miss J Astbury
Matter Description	Referral Branch Test
Reminder Date	18 Jul 2017
Reminder Description	Hearing Date
Key Date	01 Aug 2017

Notes

some more notes

Fusion's Key Dates is installed as a module onto your MatterSphere server and can be configured to meet your company's task tracking requirements.

Installation Costs

- There is a single installation cost, plus an annual support fee. Please Contact Gary Colclough for all costs specifications and details. Gary.Colclough@fusionmanageit.co.uk

- Installation includes onsite setup and basic configuration.

- Further customisation is often requested by clients for bespoke quality and case management tracking requirements, and is charged in addition to the standards costs, at the normal development rate.