

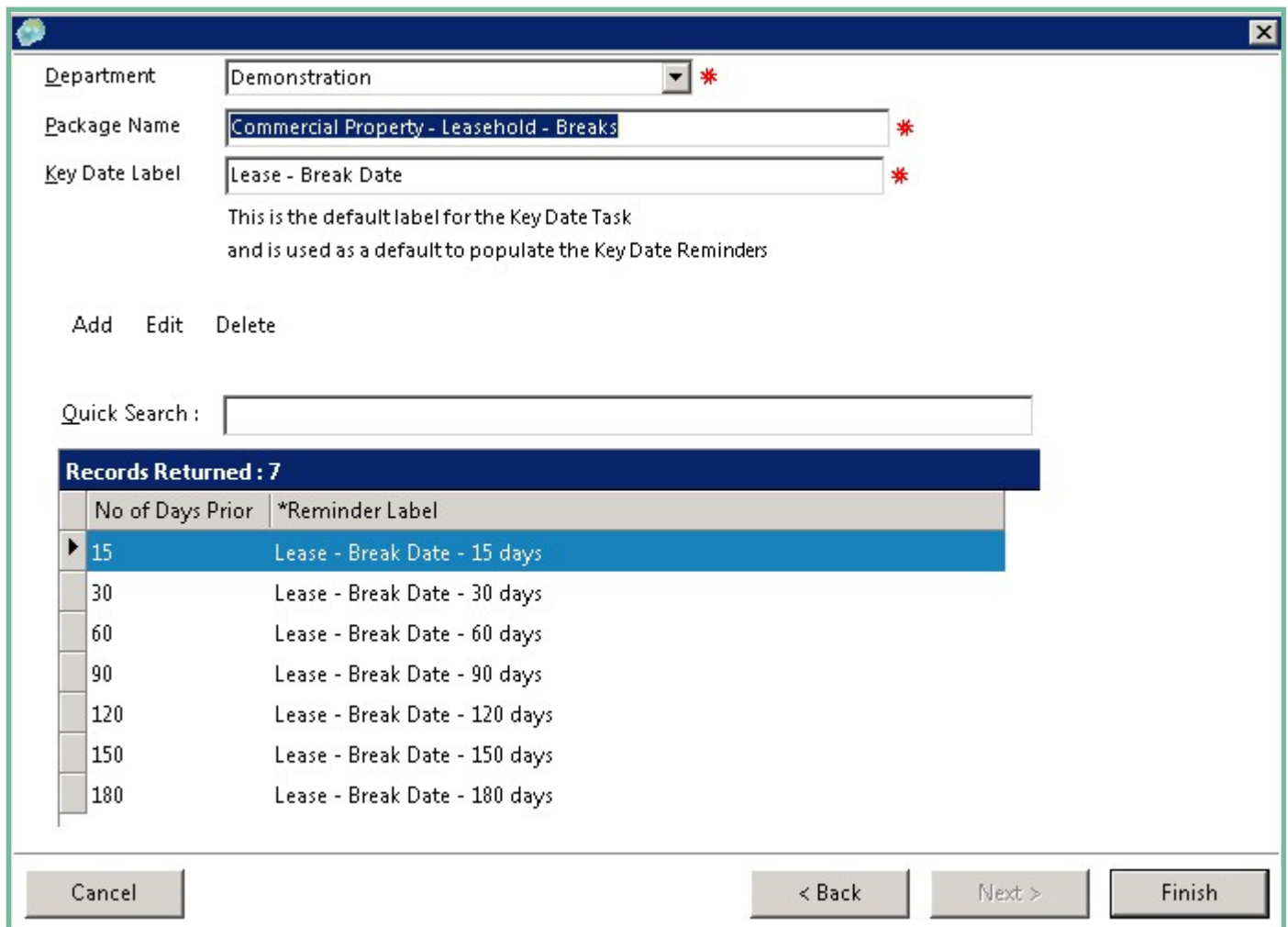
### Module Overview

**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.



The screenshot shows a software window for configuring key dates. It includes the following elements:


- Department:** A dropdown menu set to "Demonstration" with a red asterisk indicating a required field.
- Package Name:** A text input field containing "Commercial Property - Leasehold - Breaks" with a red asterisk.
- Key Date Label:** A text input field containing "Lease - Break Date" with a red asterisk. Below it, a note states: "This is the default label for the Key Date Task and is used as a default to populate the Key Date Reminders".
- Actions:** "Add", "Edit", and "Delete" buttons.
- Quick Search:** An empty search input field.
- Records Returned:** A header indicating 7 records are returned.
- Table:** A table with two columns: "No of Days Prior" and "\*Reminder Label".
 

No of Days Prior	*Reminder Label
15	Lease - Break Date - 15 days
30	Lease - Break Date - 30 days
60	Lease - Break Date - 60 days
90	Lease - Break Date - 90 days
120	Lease - Break Date - 120 days
150	Lease - Break Date - 150 days
180	Lease - Break Date - 180 days
- Navigation:** "Cancel", "< Back", "Next >", and "Finish" buttons.

## 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](mailto: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.