

Matter Management Solution Feature Breakdown

Black = Available now Blue = Planned - subject to change*	Definitions	Material All the essentials you need to get your matter management up and running.	Max Take matter management to the next level with advanced features, more capability, and personalized support.
Platform			
Matter Groups (Practice Areas)	Group matters by type	✓	✓
Matter Relationships	Create system relationships for multiple related matters (parent/child/sibling)	✓	✓
Matter Tracking	Ability to track matters through its lifecycle within the system	✓	✓
Matter Reviews	Set up a process for matters to go through an approval process before being published	—	✓
Matter Templates	Create custom templates for different matter types	3	Unlimited
Matter Custom Fields	Support for custom fields (or attributes)	20	Unlimited
Confidential Matters	Ability to keep confidential matter information secret or private	—	✓
Matter Activity Log	An audit log of all matter-related activity within the system	✓	✓
Matter List Report	Comprehensive list of all matters, filtered by status	✓	✓
Matter Inventory Report	Overview of open, closed and pending matter counts, and averages by matter lead / lead attorney or matter group / practice area	✓	✓
Matter Status Report	Report that gives insight into the status of matters	✓	✓
Matter Leads Workload Report	Report showing matters by matter lead to better understand workloads	✓	✓

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Document Management			
Setup Categories	Create document categories	✓	✓
Setup Labels	Create document labels	10	Unlimited
Create Folder Hierarchy	Created folder hierarchy for better organization	✓	✓
Upload Files	Ability to upload and attach files	✓	✓
Duplicate File Upload Check	Check files for duplicates when uploading	✓	✓
Download Files	Ability to download files	✓	✓
Download Folders (multiple files)	Ability to download folders (and multiple files)	—	✓
Move Files	Ability to move files to different locations	✓	✓
Malware Scanning & Management	Scan uploaded files for malware	✓	✓
Document Version Control & History	Version control for documents and access to version history	—	✓
Full Text Search	Ability to search entire document (titles and body)	—	✓
OCR Capability	Support for Optical Character Recognition (OCR) in search	—	✓
In-app File Preview	Preview files without leaving SimpleLegal	—	✓
256-bit AES and SSL/TLS encryption	Top-tier data security	✓	✓
Box Integration	Integration with Box	—	✓
iManage Integration	Integration with iManage	—	✓
Create Default Folder Structure	Ability to create a default folder structure	—	✓
Document Management Report	Report to better understand how document management is being used	—	✓
Document Workbench	Create and manage documents from directly within SimpleLegal.	—	✓

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Legal Service Requests

Request Legal Assistance	Legal service requests	—	✓
Custom Legal Request Forms	Create custom legal service request forms	—	✓
Track Legal Request Status	Track the status of legal service requests	—	✓
Legal Request Workflow	Establish and manage a matter intake process	—	✓
Email Notifications	Legal service request email notifications	—	✓
Convert Legal Request to Matter	Seamlessly convert legal service requests into trackable matters	—	✓
Legal Request Report	Report to better understand how legal requests are being used	—	✓

Task Management

Create Tasks	Create matter-related tasks	✓	✓
Create Subtasks	Created matter-related subtasks	3 per parent task	Unlimited
Create Tasks from Template	Create tasks from custom templates	—	✓
Task Attachments	Attach files to tasks	3 per task	Unlimited
Task Comments	Add comments to tasks	✓	✓
Private Tasks	Make tasks private	—	✓
Task Types	Track different task types	Standard	Custom
Task Priorities	Track different task priorities	Standard	Custom
Task Status	Track task statuses	Standard	Custom
Generate Task Templates (manual setup)	Set up task templates manually	—	✓
Generate Task Templates (using AI)	Set up task template using artificial intelligence	—	✓
Bulk Edit Tasks	Execute changes and updates across multiple tasks in the system	✓	✓
Task List Export	Export a list of all tasks	✓	✓
Task Notifications	Notifications for tasks	✓	✓
Task Assignment (Multiple)	Assign tasks	✓	✓

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Task Management (Cont.)			
Task History	Track a task's history	✓	✓
Task Followers	Add followers to tasks	✓	✓
Task List View	A list view of tasks	✓	✓
My Tasks View	A view of tasks assigned to you	✓	✓
My Requests View	A view of tasks created by you	✓	✓
Task Following View	A view of tasks you're following	✓	✓
Task Quick View (Home Page)	Task module on home page	✓	✓
Task Calendar View	View tasks in a calendar view	✓	✓
External Calendar Integration (MS, Google, Apple)	Integrate tasks with an external calendar	—	✓
Task Kanban View (Board)	View tasks in a kanban view	✓	✓
Task Workbench View	View tasks in a workbench view	✓	✓
Task Utilization Report	Report that provides insight into task utilization, assignment, prioritization, and categorization.	✓	✓
Task Health Report	Report on tasks based on their status (ahead of schedule, on time, or delayed) that helps identify workload based on task assignments	—	✓
Task Productivity by User Report	Report on tasks and status by user	—	✓
Task Progress by User Report	Report on task progress by user	—	✓
Task Optimization Report	Report on task types, organized by their strategic value and complexity, to better understand matter resource allocation	—	✓

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Event Management

Event Types	Setup and track different event types	Standard	Custom
Customize Event Types	Customize event types	✓	✓
Create & Manage Events	Create and manage events	✓	✓
Setup Recurring Event	Create and manage recurring events	—	✓
Custom Event Reminders	Create custom event reminders	—	✓
Private Events	Make events private	—	✓
Setup Court Rules	Subscribe to and select the relevant jurisdictions from a 3rd party vendor and integrate it with SimpleLegal	—	✓
Add Court Rules	Automatically find related court events for a specified jurisdiction and add those dates to your calendar	—	✓
Event Reminder Notifications	Notifications that remind about events	✓	✓
Bulk Edit Events	Execute changes and updates across multiple event records in the system	✓	✓
Export Events	Export events for offline analysis	✓	✓
Events List View	A list view of all events	✓	✓
Agenda View	A view of all your events	✓	✓
Events Calendar View	View events in a calendar view	✓	✓
Events Calendar (Team)	View all events for the team in a calendar view	✓	✓
External Calendar Integration (MS, Google, Apple)	Integrate events with an external calendar	—	✓
Event Summary Report	High-level report summarizing events	—	✓

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Matter Collaboration Management

Internal collaboration with legal and business teams on matter status	Collaborate internally with on matter status	✓	✓
Copy shared files	Ability to copy files that have been shared	—	✓
Download shared files	Ability to download files that have been shared	✓	✓
External collaboration with outside counsel on matter status	Collaborate externally with law firms on matter status	50 messages	Unlimited
External collaboration with outside counsel on matter files	Collaborate externally with law firms on matter files	5 Files	Unlimited

Reporting and Analytics

Standard reports (real-time)	Access to out-of-the-box, real-time report library	✓	✓
Ad-hoc reports	Ability to create ad-hoc reports	✓	✓
Enhanced reports (snapshot)	Access to enhanced reporting capabilities (create new reports, tailor existing reports, access to more data and analysis capabilities)	✓	✓

Vendors

Vendor setup	Initial vendor setup in system and onboarding	✓	✓
CounselGO (vendor collaboration portal)	Ability for law firms to access and use vendor portal (matter collaboration)	✓	✓
Vendor groups	Group vendors together within system (for budgeting and reporting)	—	✓
Vendor surveys	Ability to survey in-house team for feedback on law firm performance	—	✓
Collaboration with a vendor on non-matter files	Collaborate with a law firm on non-matter files	Material 5 Files	Material 5 Files
Copy shared non-matter files	Ability to copy non-matter files that have been shared by vendors	—	✓
Download shared non-matter files	Ability to download non-matter files that have been shared by vendors	✓	✓


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Account Overview And Setup

Bulk actions	Execute changes and updates across multiple records in the system	✓	✓
Address book	Store and find contact information of billing and matter stakeholders	✓	✓
Vendor setup	Initial vendor setup in system and onboarding	✓	✓
User management	Create and manage SimpleLegal users (role, notifications, login, etc.)	✓	✓
User teams	Manage user teams and their permissions	10	Unlimited
Conditional custom attributes	Associate 2 or more custom fields together so they are dependent on each other	—	✓
Permissions	Manage permissions for individual user access	—	✓
Storage	Storage limits for documents	500GB	3TB

Support

Access to customer success team	Access to CS team	✓	✓
Live webinar and on-demand training	Access to user trainings	✓	✓
Online knowledge base	Access to online help center	✓	✓
Law firm / vendor support	Technical support for law firms, free of charge	✓	✓
Email support	Email support for customers	✓	✓
In-app guidance	Guidance for new functionality and features within the SimpleLegal application	✓	✓
Live chat	Live chat support for customers	—	✓
Annual success planning	Dedicated time with Success to review goals and plan how to get there	—	✓

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Add-ons			
Custom reports	Reports built specifically for an individual customer	Add-on	Add-on
SimpleLegal API	Access to SimpleLegal's REST API	Add-on - 10K transactions per month per API token	Add-on - 10K transactions per month per API token
Third party integrations	Integrations with other applications like AP, ERP, time tracking, IP management, etc.	Add-on	Add-on
Sandbox environments	Test environment for customers to test changes prior to them going live in production	Add-on	Add-on
Single sign on (SSO)	Apply SSO for easy login and greater security	Add-on	Add-on
"Single tenant environment (dedicated environment)"	Host SimpleLegal on a distinct software instance running on infrastructure that is not shared with other customers	—	Add-on
"Historical data migration (service only; one-time charge)"	Migrate historical data from prior e-billing solution into SimpleLegal	Add-on	Add-on
Outlook Integration	Integration with Outlook	—	

*Safe Harbor Statement

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