



WP / DATA SHEET DYNAMICS 365 LAWYERS

In the legal sector, law firms need to acquire greater organizational capacity, optimize their resources with maximum professionalism, carry out a strict economic control of their cases and respond to the challenges of cybersecurity.

DYNAMICS 365 LAWYERS

INTEGRAL MANAGEMENT

The knowledge you need to keep your business managed and controlled effectively.



Thanks to Dynamics 365 Lawyers, the vertical solution solely developed by IFR, together with the disruptive technology that the **Microsoft Dynamics 365** platforms and **Microsoft Azure** offer, the legal sector can benefit from a global solution, powerful and cutting-edge, that allows total control of cases providing mobility and independence to all the lawyers of the firm.

The **Dynamics 365 Lawyers** solution has the functionalities for all different areas

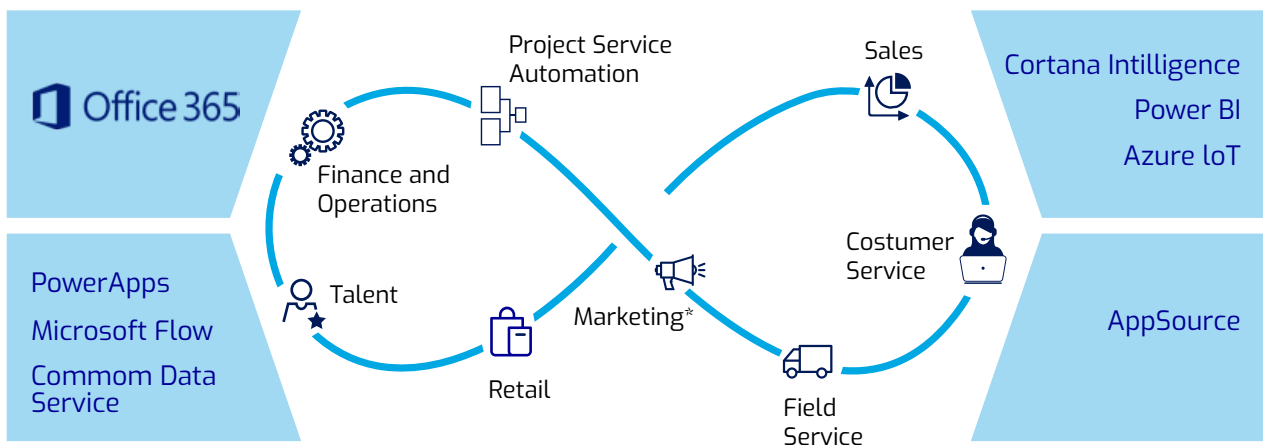
of management within the advocacy profession. Facilitating large companies in the legal sector the possibility of achieving their business objectives, without putting at risk the security of the information that they generate, nor the investment in technology that they acquire, given that the global solution **D365 Lawyers** is designed with the necessary flexibility to integrate, in a customized manner, the functionalities that are needed at every business stage.

Get the benefits of the best technology with Dynamics 365 and Azure.

TECHNOLOGICAL PLATFORM IN THE CLOUD

Dynamics 365 Lawyers allows incorporating functionalities such as marketing services with CRM, financial and treasury management, Business Intelligence, document management with SharePoint, Machine Learning amongst others. In addition, the new platform has an extensive virtual repository for downloading apps, as well as the possibility of creating your own ones.

MICROSOFT DYNAMICS 365



MAIN FUNCTIONALITIES

ENTRY MANAGEMENT

The system allows the automatic creation of cases and clients through the integration of conflict control.

CASES MANAGEMENT

From the case, it is set up the control of all areas to be managed related to the case itself.

Rates are kept for each of the lawyers or partners. They are specified by professional category and effective date. Additionally, positions, categories, disciplines, teams, etc., for each of the resources are established accordingly.

For the cases financial control, the vertical solution offers the following functionalities:

- **Expenses management**
Control of payments made to third parties on behalf of the client. The control is done from the beginning of the process with the proposed payment of the expenses, their accounting and collection.
- **Provision of funds management**
Control of provision of funds issued to the client and applied to each one of the invoices related to the fees, both by case and by customer. The system performs the netting of provision within the billing process.
- **Input of the lawyers and partner hours to the case**
The control of the hours worked is established, the nominal amount, the billing status, the actual billing amount and the write off or markup applied to each transaction.
- **Management and control of expenses**
Input of expenses to the case. Control of advances to employees.
- **WIP (work in progress)**
Control of work in progress, with functions to revalue the work in course and make the automatic postings thereof.

BILLING

Regarding the invoicing of the cases, the vertical solution offers a great deal of different billing possibilities.

- **Billing a single case to multiple clients**
- **Billing of several cases to different clients**
- **Pre-invoicing management (Write off, Markup)**
Generation of the pre-invoice. Validation flow of the pre-bill until the invoice is issued.

SALES BUDGET

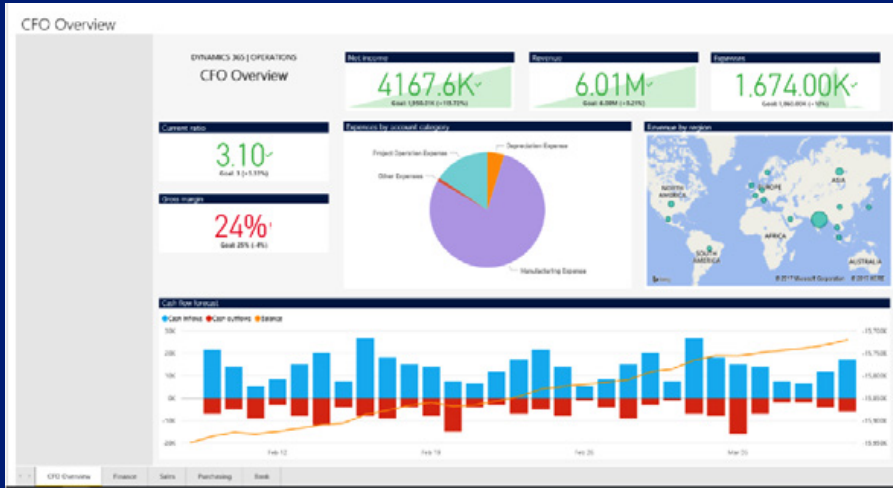
The vertical solution allows you to automatically make sales budgets of different natures, hours, amount, accounting, etc.

ANALYSIS

The vertical solution has a set of reports and queries for the complete and detailed analysis in each area.

- **Scorecard**
- **Analysis of production**
- **Billing reports**
- **Equipment reports**
- **WIP monthly target**
- **P and G and financial reports**

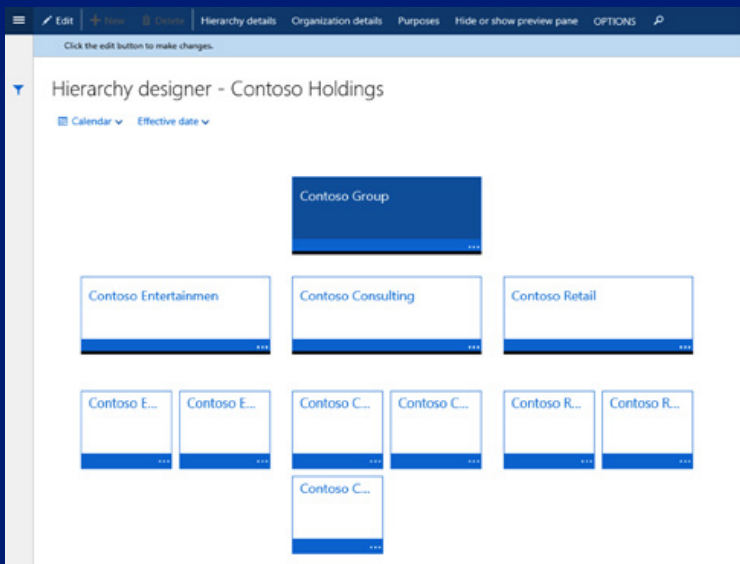
ECONOMIC MANAGEMENT



The finances of Dynamics 365 Lawyers allow an absolute control of all the activity and documentation generated, financially, by a company.

The system manages financial information in real time, with the creation of instant work flows, guarantees all the activity to be reflected to the accountancy domain.

MULTI-COMPANY



Dynamics 365 Lawyers meets the companies needs in the sector and in its most complete version, allows the management of large corporations with a network with international affiliate companies. As a global platform, Dynamics 365 can integrate, remotely, from the central of the group, the direct management of its subsidiaries. The integration allows to create all the required documentation between the companies of the same group in an automated way, as in the case of automatic creation of the sales invoices from the purchased ones.

PLATFORM AND GLOBAL SOLUTION

As a fully customized platform, both in Cloud environment and On-Premises, Dynamics 365 Lawyers allows the expansion of its functionalities according to the needs of the company. This is a highly competitive global solution in development costs, implementation, maintenance and updates.

With Dynamics 365 Lawyers you will have all the advantages of a platform in the cloud that integrates ERP, CRM, Office, BI, cognitive services and all the technology to guarantee the technological future of your company.



RELIABILITY

Dynamics 365 Lawyers is the result of more than 30 years of dedication to the development of integral business solutions. Accredited as an international reference in the Microsoft Dynamics platform, in IFR Group we know the evolution of the legal sector and we are experts in its digitization. Our reliability is based on the trust of large law firms, for which we have developed, tested and integrated, new functionalities to their ERPs.

**REQUEST A
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CONTACT

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