



# Webinar Series:

## Orion Reimbursement Manager

Presented By: Kevin Harris

The screenshot shows the Orion Reimbursement Manager desktop application. It features a main window with a menu bar (New, Edit, Delete, Reports, Submit, Deny, Approve, Action, Tools, Filter, Refresh) and a toolbar. The interface is divided into several panes:

- Requests:** A table listing requests with columns for Date, Requested By, Client Matter, Description, Amount Total, Status, and Image. The table contains several rows of data, including requests for estate analysis, board meetings, and business dinners.
- Reimbursement Monitor:** A summary section showing counts for Open Requests (2), Total Open Requests (\$620.70), Approved Requests (1), and Total Approved Requests (\$41.14).
- My Unapproved Requests:** A table listing unapproved requests with columns for Date, Client Matter, Description, Amount, Status, and Image.
- Request Detail:** A detailed view of a specific request, showing fields for Date, Name, Request Type, Description, Amount, Status, and Image.
- Expense Reimbursement Entry:** A form for creating a new request, with fields for Request (14 - Entered), Date (Mon, 03/03/2014), Employee (NEE Edwards, Nancy E), Vendor (NEE Nancy E, Edwards), Matter (002421-000001 - ALLISON, YOLANDA), and Description (Meeting with Mrs. Allison regarding estate analysis & retirement planning).
- Detail:** A detailed view of a request entry, showing fields for Date (03/03/2014), Matter (002421-000001 - Estate Planning), Type (MILE Mileage), Amount (\$74.24), and Description (Mileage to/from client's accountant's office).

The screenshot shows the Orion Reimbursement Manager mobile application interface, displayed on a tablet and a smartphone. The tablet screen shows a list of reimbursements with columns for Date, Status, Description, and Amount. The smartphone screen shows a detailed view of a reimbursement entry, including fields for Status, Date, Client Matter, Account, Description, and Add Detail.



# Reimbursement Manager

Eliminating Paper-Based Reimbursement Requests

- Introduction & Background
  - How many of your attorneys travel or are involved in business development?
  - Tired of keeping track of paper receipts for purposes or based on Client requirements?
  - Is your firm still using a paper-based system?
  - If so, why?
  - Ready for a better way that integrates with Orion?



# Reimbursement Manager

Eliminating Paper-Based Reimbursement Requests

- Robust Features Include
  - User friendly interface for the Desktop and iOS devices via iOrion
  - Improved workflow between the front and back office
  - Business development expenses automatically post to the appropriate general ledger account
  - Administrators can define the reimbursement types, limiting what attorneys and staff can use



# Reimbursement Manager

Eliminating Paper-Based Reimbursement Requests

- Robust Features Include
  - Customizable email templates for alerting attorneys and legal staff on change in reimbursement status
  - Attach digital receipts for immediate processing
  - As expenses are approved, A/P Vouchers are automatically generated for payment processing



# Reimbursement Manager

## Eliminating Paper-Based Reimbursement Requests

- Are you ready to see Orion's Reimbursement Manager?

The desktop interface includes several key components:

- Requests Table:**

Request	Date	Regarded By	Client Matter	Description	Amount Total	Status	Image
14	3/2/2014	NEE	002421-000001	Meeting with Mrs. Allison regarding estate analysis & retirement planning	\$74.24	Entered	
1	3/4/2014	NEE	001546-000001	Interview with Experts and Witnesses	\$532.78	Submitted	
10	3/6/2014	NEE	001546-000001	Deposition of Mike Smith	\$500.30	Needs Info	
12	3/10/2014	NEE	000001-000001	Business Dev - Brad Wilson Golf Outing	\$295.92	Submitted	
2	3/12/2014	NEE	001546-000001	Meeting with board members regarding possible settlement	\$637.57	Needs Info	
9	3/13/2014	NEE	001546-000001	Deposition of Jane Doe	\$556.95	Entered	
- Reimbursement Monitor:**
  - Open Requests: 2
  - Total Open Requests: \$628.70
  - Approved Requests: 1
  - Total Approved Requests: \$41.14
- Expense Reimbursement Entry Form:**
  - Request: 14 - Entered
  - Date: Mon, 03/03/2014
  - Employee: NEE Edwards, Nancy E.
  - Vendor: NEE Nancy E. Edwards
  - Matter: 002421-000001 | ALLISON, YOLANDA
  - Description: Meeting with Mrs. Allison regarding estate analysis & retirement planning
  - Amount: \$74.24
- Detail View:**
  - Date: 03/03/2014
  - Matter: 002421-000001 | Estate Planning
  - Type: MILE Mileage
  - Amount: \$74.24
  - Description: Mileage to/from client's accountant's office
  - Status: Entered

The mobile app interface displays a list of reimbursement requests categorized by status:

- Approved (1):** \$41.14
  - 02/16/2013: Dispute case assessment with board members
- Entered (2):**
  - 03/03/2014: Nancy E. Edwards Meeting with Mrs. Allison regarding estate analysis & retirement planning (\$74.24)
  - 03/13/2014: Nancy E. Edwards Deposition of Jane Doe (\$556.95)
- Needs Information (2):**
  - 03/06/2014: Nancy E. Edwards Deposition of Mike Smith (\$500.30)
  - 03/12/2014: Nancy E. Edwards Meeting with board members regarding possible settlement (\$637.57)
- Submitted (2):**
  - 03/04/2014: Nancy E. Edwards Interview with Experts and Witnesses (\$532.78)
  - 03/10/2014: Nancy E. Edwards Business Dev - Brad Wilson Golf Outing (\$295.92)



# Reimbursement Manager

Eliminating Paper-Based Reimbursement Requests

- Pricing
  - Starts at \$1995.00 and varies based on firm size
  - Software Maintenance & Support Increase (15% of the software purchase price will be added to the annual Software Maintenance & Support Contract)



# Reimbursement Manager

Eliminating Paper-Based Reimbursement Requests

## Questions?

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