



Perceptive Software
Measurable Results

Orion Version 5



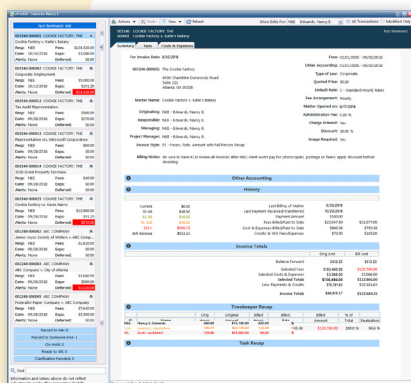
Tomorrow's Firm Management Solution, Available Today!

Orion Version 5 is an extensive and exciting update to your Orion Software. Version 5 contains hundreds of new features, including the addition of Orion's ePrebill Manager, continued enhancements to iOrion, the widely popular mobile platform for Orion, significant enhancements to the Client Intake and Conflict Avoidance System and the addition of tracking Attorney Assignment History & Reporting.

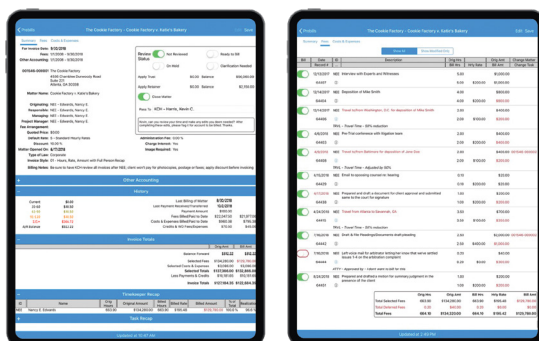
Highlights also include the expansion of Orion's Billing Guideline Management tools designed to reduce the number of invoices having to pass through an appeals process, the continued expansion of Orion's imaging platform to now include tracking of payments applied to Client invoices but also journal entries in the General Ledger. These updates and add-ons enhance the Orion experience and are available at no additional cost to customers enrolled in our maintenance plan.

What's New - Orion's ePrebill Manager

Orion's ePrebill Manager provides a structured electronic method of distributing prebills for review, editing, markup, one-click acceptance and approvals. It increases visibility into the status of prebill assignment and also reduces paper and printer costs of a paper-driven process. The ePrebill Manager speeds up the firm's billing cycles and increases cash flow by getting bills out sooner. The ePrebill Manager is fully integrated with Orion's desktop application and iOrion, Orion's mobile solution.



Orion's ePrebill Manager offers a cleanly presented design, mirroring the traditional prebill layout. This format allows for a smooth transition to handling prebills electronically while also offering much greater productivity and collaboration.



Blending the trusted reliability of Orion's Desktop application with the innovative and intuitive user experience found in Orion's mobile application, iOrion, Orion's ePrebill Manager app provides a full-featured solution for attorneys that find themselves on-the-road or simply prefer a tablet version rather than the Desktop application.

"We are excited to announce the official release of Version 5 which enhances the Orion experience with significant updates and useful features. With the addition of the ePrebill, firms will see greater productivity and collaboration while reducing the overall time spent each billing cycle. Other improvements include enhancements to the client intake process, streamlining conflict searches, the ability to track where legal services are rendered as well as the continued expansion of Orion's e-billing guidelines management tools. These, along with hundreds of other improvements, have been added to improve upon Orion's reputation in offering perceptive software with measurable results."

Paul Yelton
President

Orion Law Management Systems, Inc.



What's New - iOrion Version 5

For today's legal professionals, a full-featured mobile access tool is more than "nice-to-have" – it's a necessity. iOrion® is a complete financial management mobile application that allows legal professionals to access data from Orion using any recent-model Apple iOS® or Google Android® device. With basically no training and very little setup, lawyers and their legal staff are able to immediately begin entering time and performing other important tasks on any compatible mobile device. iOrion Version 5 improves upon the widely popular mobile application by adding intuitive features such as the ability to request a rideshare using Uber or Lyft as well as to get directions using popular applications such as Apple® Maps, Google Maps™ and Waze™.



At a tap, request a rideshare or driving

What's New - Enhancements to Client/Matter Intake and Conflict Avoidance

The impact of an unidentified conflict of interest can be significant for a law firm in many ways. Direct consequences can be felt if the law firm is unable to pursue a particular matter when a conflict of interest is discovered. Depending upon when the conflict is discovered and their severity, consequences can include lost of repaid legal fees or even disbarment. Yet, this must be balanced with the need to efficiently complete the process of opening new Matters.

In this latest release, Orion has been updated to provide a more efficient method of adding parties to a new Matter. Names can be copied from a document and pasted directly into the Matter Intake form or they can be imported from a text file, simplifying the process over manually typing names, aliases and relationships for the new Matter. Once added, performing a search can now be conducted directly from within the Matter Intake by selecting the "Conflicts Search" option.

Matter Intake (9/15/16 COOKLE FACTORY, THE)

Assigned to: NEE Edwards, Nancy E.

Matter Name: Cookie Factory vs. Kevin Harris

Additional Matter Description

Conflict Names (Search/Add)

Name	DEA/A...	Relationship
Alexandra Krosney		RELATED TO ADV...

Billing/Responsible Attorney: NEE Edwards, Nancy E.

Conflict Search: Assigned to: LED Dees, Laura E.

Conflict Check Complete? ☐ Completed?

Add Matter Information

Opened Date: 01/19/2019

Retainer Letter Sent? ☐ Yes ☐ No

Retainer Letter Executed? ☐ Yes ☐ No

Retainer Deposit Received? ☐ Yes ☐ No

Budget - Fees: 10000

Budget - Expense: 2500

Billing Address

Bill to: The Cookie Factory

Address: 6336 Chambliss Dunwoody Road, Suite 221

City: Atlanta State: GA Zip: 30338

Country: United States

Attention: Jesse Bennett

Phone: (770)-454-9356 Fax: (770)-454-9356

☒ Use Client's Address

Import Options

File: C:\Users\jdoe\Desktop\Names.txt

☒ File has a header row

Conflict Search

Requested By: NEE Edwards, Nancy E.

☒ Matter Name

☒ Related Conflict Names

☐ Billing, Bill To

☐ Billing, Attention

Batch Search

Conflict Search Results

Name	Relationship	Client Matter	Client File As	Matter Name	Opened	Closed	Reg Affy
Kevin Harris, Promoter, 2	ADVERSARY	004952-000002	COOKIE FACTORY, THE	Harris, Kevin vs. Harris, Kathryn	8/23/2013		CBS
Charles Smith	ADVERSARY	004952-000002	COOKIE FACTORY, THE	Harris, Kevin vs. Harris, Kathryn	8/23/2013		CBS
Chris Spaulding	ADVERSARY	004952-000002	COOKIE FACTORY, THE	Harris, Kevin vs. Harris, Kathryn	8/23/2013		CBS
Clay Shirley	ADVERSARY	007963-000002	CONFIDENTIAL SECURITY A...	Harris, Kevin vs. Parson, Jay	1/24/2014		GAG
Harris, Jessica	ADVERSARY	004948-000002	COOK AND EAT	Harris, Kevin vs. Parson, Jay	5/7/2014		NEE
Harris, Katherine	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Jason Clark	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Jason Clark	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Kevin Harris	ADVERSARY	001346-000002	COOKLE FACTORY, THE	Cookle Factory vs. Kaleb's Bakery	6/47/2006		NEE
Kevin Harris	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Paul Veloso	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Paul Veloso	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Robert Smith	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Robert Smith	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Scott Breneman	ADVERSARY	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
HARRIS, KEVIN C.	CLIENT	000003	HARRIS, KEVIN C.		9/28/2003		DU
KEVIN C. HARRIS	CLIENT	000003	HARRIS, KEVIN C.		9/28/2003		DU
KEVIN HARRIS	CLIENT	000003	HARRIS, KEVIN C.		9/28/2003		DU
Cook and Eat vs. Harris, Kevin	MATTER	004948-000002	COOK AND EAT	Cook and Eat vs. Harris, Kevin	10/12/2018		NEE
Cookle Factory vs. Kevin Harris	MATTER	001346-000002	COOKLE FACTORY, THE	Cookle Factory vs. Kevin Harris	10/12/2018		NEE
GENERAL REPRESENTATION	MATTER	000000-000001	Kevin Harris	General Representation	9/14/2003		NEE
Harris, Kevin vs. Harris, Kathryn	MATTER	004952-000002	COOKIE FACTORY, THE	Harris, Kevin vs. Harris, Kathryn	8/23/2013		CBS
Harris, Kevin vs. Parson, Jay	MATTER	007963-000002	CONFIDENTIAL SECURITY A...	Harris, Kevin vs. Parson, Jay	1/24/2014		GAG
Harris, Kevin vs. Parson, Jay	MATTER	004948-000002	COOK AND EAT	Harris, Kevin vs. Parson, Jay	5/7/2014		NEE
Harris, Kevin vs. Parson, Christopher	MATTER	000333-000004	Kevin C. Harris	Harris, Kevin vs. Parson, Christopher	1/25/2002		NEE
Michael J. Ellis	CLIENT	000000-000001	COOKLE FACTORY, THE		10/12/2018		NEE

Names, Aliases and their Relationship can now be Imported, dramatically improving the efficiency of requesting a new Matter.

In addition to providing a more resourceful method of adding names, Orion Version 5 also expands the scope of what can be included when performing a search, adding accuracy to the results presented. Prospective Clients, new Matters for existing Clients and the parties involved in those cases, while in the Intake process, are now included in all searches. Furthermore, any previous "formal" search, similar to those conducted for new Clients, Matters and searches conducted when during a lateral-hire, are also included. Conflict avoidance is made simpler yet more reliable than ever before with Orion Version 5.

Conflict Searches have been Simplified by Providing the Option to Conduct the Search Directly from the Matter Intake

What's New - Attorney Assignment History Tracking & Reporting

Tracking Attorney Assignment History provides a new advantage to key revenue-related reports. While assigning the Originating, Managing, Project Manager and Responsible Attorney, as effective date can be assigned. For the Originating and Project Manager fields, not only can these assignments be split, but a historical reference as to how these splits have been assigned or changed over time is now maintained.

While running key revenue-related reports, when the "Use Assignment History" option is selected, the attorney assignment effective date is taken into consideration. Additionally, for where these assignments are split, the allocated percentages are also factored-in based on the effective date.

EffectiveDate	PersonName	Percent
EffectiveDate : 1/1/2018 (2)	Edwards, Nancy E.	75
1/1/2018	Harris, Kevin C.	25
EffectiveDate : 6/17/1996 (1)	Edwards, Nancy E.	100
6/17/1996	Edwards, Nancy E.	100
EffectiveDate : 1/1/1994 (1)	Pearson, Chris	100
1/1/1994	Pearson, Chris	100

Attorney Assignments now offer an Effective Date for Historical Record-Keeping & Reporting Purposes

Key Revenue-Related Reports Now Include the Option of Using the Assignment History and Effective Dates

When Saving a Fee, if a Word, Phrase or Character is Found that is not Allowed by the E-Billing Company, the User is Notified so that they may Correct the Entry

What's New – Enhanced Billing Guidelines with Reserved Word Enforcement

Electronic billing is supposed to streamline the billing and payment process, yet many firms struggle with the complexity and unexpected requirements that e-billing often brings. At Orion, we're committed to providing tools to simplify the e-billing process. Version 5 expands on its billing guidelines management tools by adding Reserved Words enforcement. Once a Reserved Word Set is assigned to a Matter, as a Fee is entered, the description is scanned for words, phrases and even specific characters that have been flagged by the e-billing company for rejection. When found, the word, phrase or character can atomically be replaced, or the attorney/legal staff can manually adjust the transaction before saving it.

This scan can also be conducted globally prior to generating prebills, from Orion's ePrebill Manager and even prior to generating the final invoice while the billing manager is applying the annotations/changes presented by the attorney.



What's New – Work Location Tracking & Reporting

Effectively reporting on where a legal service is performed has become an important aspect to state and local city gross receipts tax laws. While states and many cities have varied standards, which dictate how employers withhold income tax for employees that work for periods of time in a state where they don't live, the need to track the time spent in those key states and cities is critical. In this latest release, Orion has introduced the option of relating the location in which the service was rendered to each Fee/Time entry.

Work Locations can be Assigned to Fee/Time Entries to Provide Accurate Reporting for State/City Payroll Taxes

Other Orion Version 5 Updates Include

System-Level Enhancements

- Improved Grid Controls & Functions Including a Universal “Find”, Column Auto-Sizing, Addition of User Option to Set “Alternating Colors” for Grids for Improved Readability and Auto-Totalling on all Unit & Amount Columns
- Added a “Calculator” to all Amount Fields for Simplified Data Entry
- Addition of Orion’s Quick-Launch® Tool for Streamlined Access to Commonly Used Features

Financial Management

- Enhanced Global Editing of Clients, Matters & Expenses
- Added option to Hide Inactive Vendors, Bank Accounts & General Ledger Accounts in Lookups & Manager Views
- Added Ability to Option to Flag Vendors in Accounts Payable as Subject to a Usage Tax (and Added Associated Usage Tax Report)
- Added Navigation to Edit Client & Matter Information from Prebill Manager/Bill Prep
- Added Ability to Import Journal Entries into the General Ledger (e.g. AJE’s from Payroll Systems) as well as Budgets

Practice Management

- Added Navigation Support for Google Maps & Bing Maps in Contacts
- Simplified Phone Dialing, Initiating Email Communications & Browsing to a Company’s Website in Contacts (by Clicking on the Phone Icon on the Contact Detail Card)

Firm Management

- Enhancements to A/R Collection Manager to better Track the Submission and Appeal Process for Electronically Submitted Invoices
- Expansion of Orion’s Notification Management Tool to Now Include Check Request Approvals & Completion of Client/Matter Intake
- Improvements to the Client/Matter Intake Process to Include Assigning Task Sets to Clients, Entering Billing Instructions to a Client Intake.
- Records Management - Added Ability to Perform Global Edits, Auto Increment & Assign Next File Numbers, Hyperlink Browsing to Network Attached Storage of Scanned Files as well as Importing the Location (and related information) of a File from 3rd Party Applications
- Added Report Preview, Logic & Balancing to Reporting System
- Expanded Support for Export Reports to Excel XLSX Format

For more information about Orion’s ePrebill Manager or other products visit
www.orionlaw.com or email info@orionlaw.com.

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