



Perceptive Software  
Measurable Results

## Orion Version 5.2



### Tomorrow's Firm Management Solution, Available Today!



Orion Version 5.2 is an extensive, exciting update to your Orion software. Version 5.2 includes hundreds of new features which will bring new dimension to your Orion experience. New Orion ePay™ powered by LawPay enables electronic payments by credit card or eCheck. Ethical Walls Management for Clients and Matters provides an extra level of security to protect confidential data from unauthorized access. New W-9 solutions automate W-9 distribution for greater IRS 1099 compliance. And updated iOrion 5.2 improves

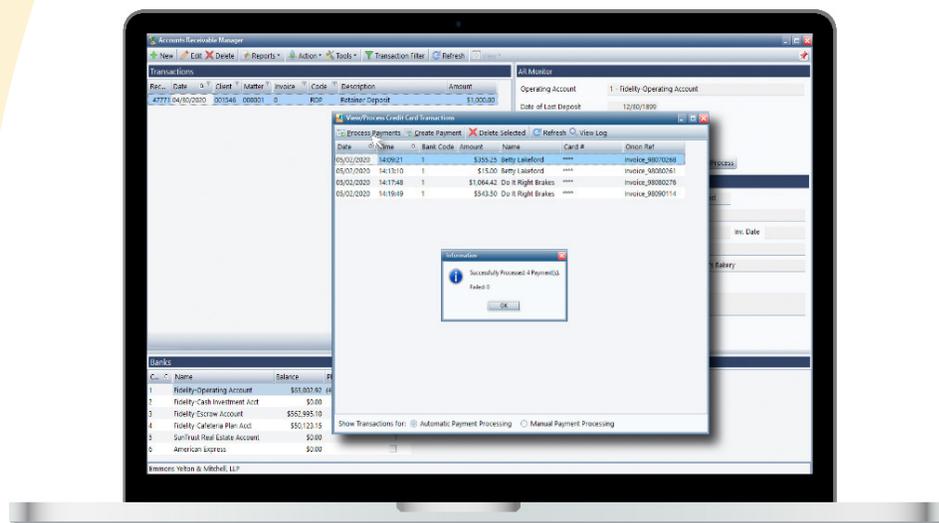
and adds more functionality from iOS and Android devices. Top this off with significant performance advances and a new 64-bit Client with support for Office 265 64-bit.

Additional highlights include the expansion of Orion's Billing Guideline Management tools to reduce the number of invoices passing through an appeals process. Also, Orion's imaging platform continues to expand to include tracking of W-9s for Vendors. 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 ePay™ with LawPay Integration

Orion's ePay takes the pain out of setting up credit card processing. Getting set up is quick and easy. The only requirement to start processing is a LawPay account, which can be initiated directly from Orion.

Clients increasingly want the flexibility of paying online by credit card or eCheck. Using the combined power of Orion ePay and online payments through LawPay, firms can be more profitable, improving cash flow while speeding up their collection time by over 30 percent, on average.



"We are excited to announce the release of Version 5.2 which enhances the Orion experience with significant updates and useful features. With the addition Orion ePay, powered by LawPay, firms can reduce their collection times and increase cashflow all while providing a more efficient way of accepting payments. Other 5.2 improvements include the ability to restrict access to specific Clients or Matters through Ethical Wall Management, the addition of W-9 Management and reporting, the ability to view payments by Project Attorney in the Payment Calendar, and the ability to request, review and approve Check Requests via iOrion. These, along with hundreds of other improvements, have been added to reinforce Orion's reputation for offering intuitive software with measurable results."

Notification of new/incoming payments occurs via Orion's A/R Manager where payments and trust deposits can be imported/processed at a click-of-a-button.

Paul Yelton

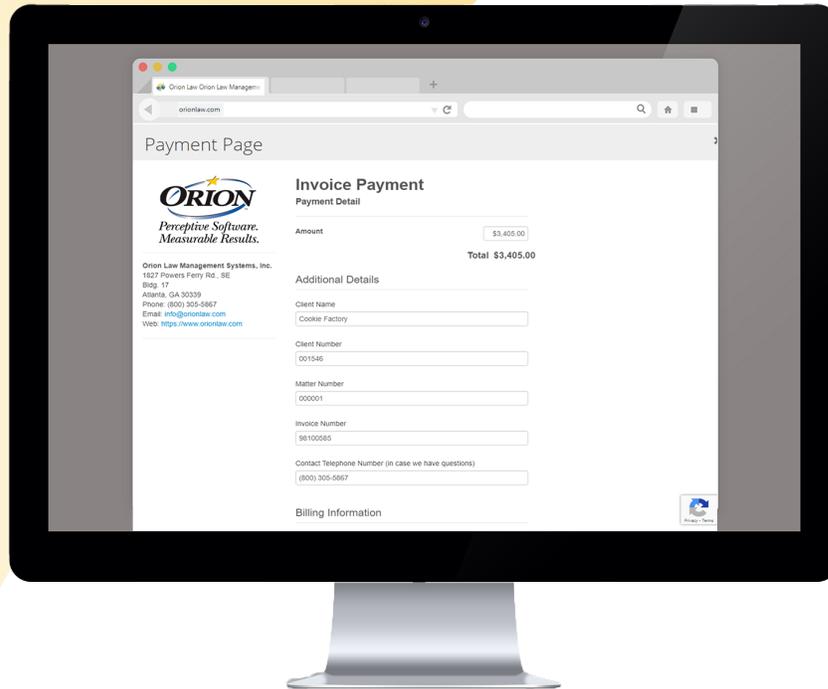
President

Orion Law Management Systems, Inc.



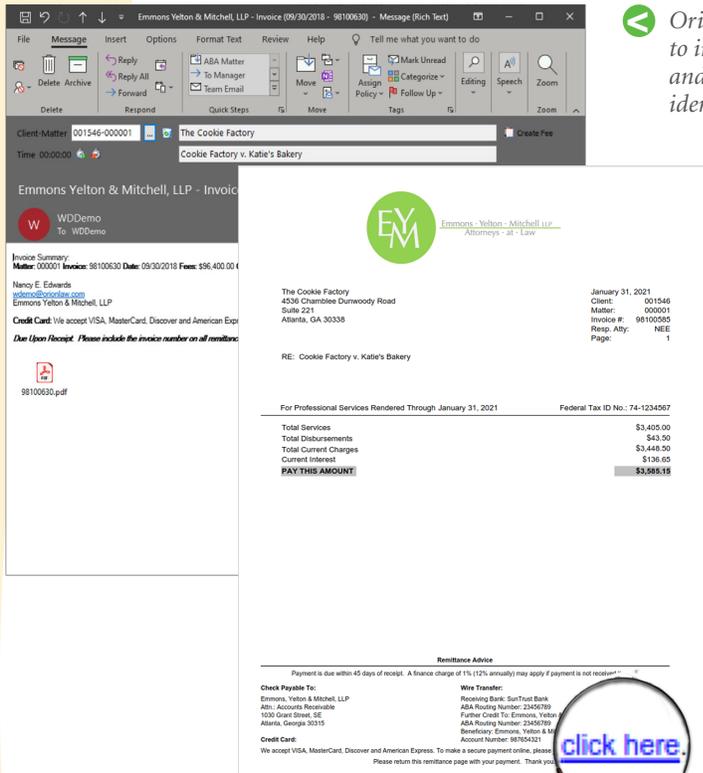
## What's New – LawPay Integration

LawPay makes it simple to include a payment link on your website so clients can immediately click to pay their invoices. In addition to the Orion-generated payment link, payments can be made online using a properly configured custom payment page which includes the Client, Matter and Invoice Number. This page can be used to link the payment to a matching record in Orion.

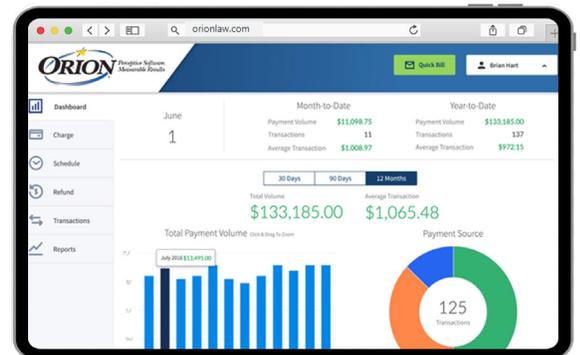


Custom payment pages can be personalized with the firm's logo and contact information, giving your clients a familiar, secure payment experience that can be initiated from your website.

Streamline credit card and eCheck payments while improving cash flow. It's as simple as sending an email from Orion's Email Bill Delivery Manager that includes a PDF copy of the bill and a secure payment link which connects the invoice to the online payment processed by LawPay.



Orion ePay – The Orion-generated payment link can be added to invoices and email templates for Orion's Email Bill Delivery and Orion's A/R Collections Manager, eliminating the hassle of identifying the proper Client, Matter and Invoice.

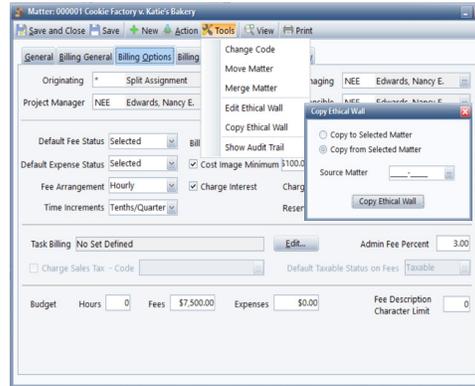
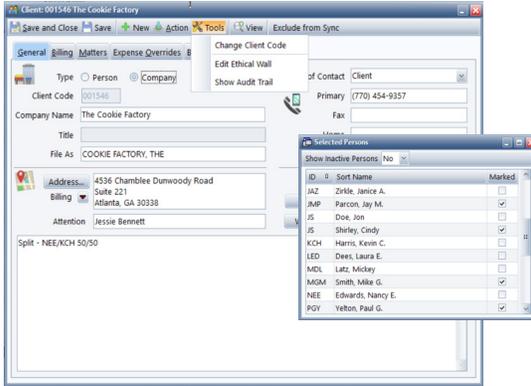


With LawPay's dashboard, you can:

- see month-to-date and year-to-date payment stats front and center
- toggle between views to see data for the past 30 days, 90 days, or 12 months
- view your ten most recent transactions and top ten clients by volume
- use the payment volume and source charts to spot trends and project cash flow

## What's New – Ethical Wall Management for Clients and Matters

An Ethical Wall is used when you do not want a specific person to have access to a confidential Client or Matter, usually because they have information relating to or interest in the outcome of a case. Whatever the reason, Ethical Walls can be set up by Client or Matter. When users are subject to Ethical Walls, they cannot search for, access, or even know the name of the confidential Client or Matter; it is completely hidden to them.

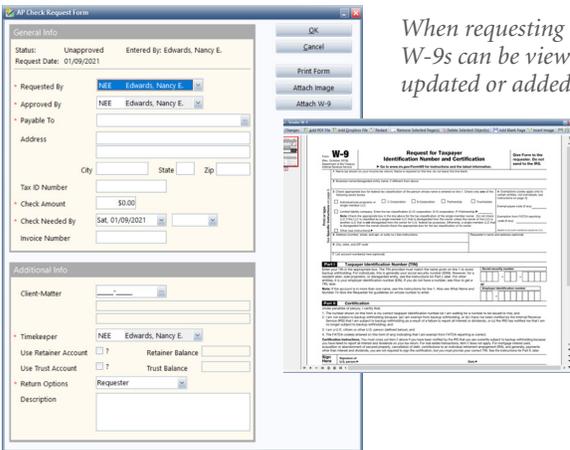


*Ethical Walls, or a list of restricted users, can be set up at the Client or Matter level.*

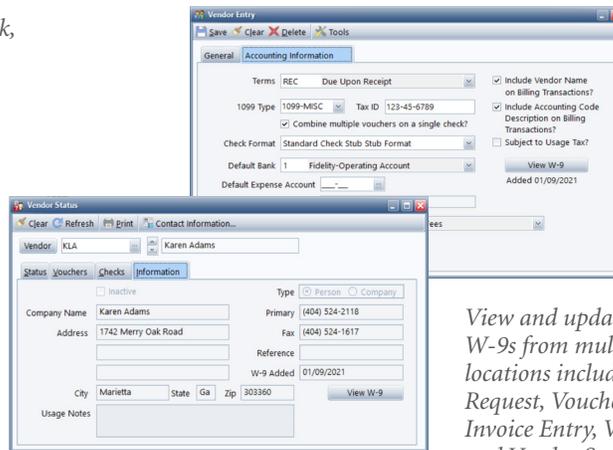
*Managing Ethical Walls, or a list of restricted users, can be copied to/from another Matter.*

## What's New – W-9 Management

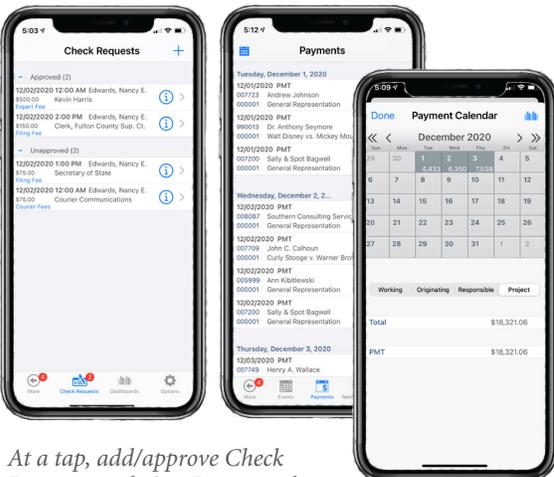
IRS 1099 compliance has been improved with Orion's W-9 management solutions. When requesting a check for a new Vendor, legal staff and attorneys can attach a W-9 from the office or on the road via iOrion. While adding or updating a W-9, the date/time stamp is recorded, which can be used to determine when an updated W-9 should be requested. Vendors with a missing or outdated W-9 are easily identified during 1099 processing as well.



*When requesting a check, W-9s can be viewed, updated or added.*



*View and update existing W-9s from multiple locations including Check Request, Voucher/Vendor Invoice Entry, Vendor Setup and Vendor Status.*



*At a tap, add/approve Check Requests and view Payments by Project Attorney right from your iPhone or iPad with iOrion 5.2.*

## What's New – iOrion 5.2

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 5.2 improves upon the widely popular mobile application by adding the ability to request and approve Check Requests right from your mobile device. In addition, the Matter Lookup and Matter views have been unified, creating a simpler, more user-friendly Matter list. Payments by Project Attorney, including split assignments, have been added to the Payment Calendar.



## What's New – BillBlast® Integration

Take the complexity out of eBilling with Aderant's BillBlast. Now integrated with Orion 5.2, BillBlast empowers law firms to increase productivity and profitability by streamlining eBilling submission, accelerating the path to payment. With Orion 5.2, BillBlast now supports the ability to extract and upload images for reimbursement requests and vendor invoices from Orion's database.



## Other Orion Version 5.2 Updates Include

### System-Level Enhancements

- Optimized load-times for all Manager Views (5x average performance improvement)
- Optimized run-times for all reports (5-10x average performance improvement)
- Addition of Orion 64-bit Client with full support for MS Office 365 64-bit
- Over 500 additional improvements

### Financial Management

- Simplified user experience in the Time Manager offering a combined view which includes a List View and an Expanded Calendar/Statistics View
- Character expansion of all codes and descriptions
- Expansion to the number of levels available to be defined and assigned to Timekeepers
- Addition of hire and termination dates for Timekeepers
- Ability to assign a reason when globally closing multiple Matters
- Improved billing guideline management with the addition of linking default task codes for Client Advance and Expense codes
- Option to adjust the bill rate for fees by a defined percent such as for travel time
- Enhanced multi-user support for billing & email bill delivery by tracking and displaying who generated, posted and emailed invoices in Orion's Billing and Email Bill Delivery Managers
- Enhanced password protection of invoices in PDF format from Orion's Email Bill Delivery and A/R Collection Manager to 256-bit Binary Encryption
- Viewing payments in the Payment Calendar by Project Attorney Assignments (with support for split percentages)
- Added 1099-NEC Flag for Vendors and style to the 1099 Processing Manager
- Added ability to import vendor invoice/voucher details from an ASCII file

### Practice Management

- Optimized performance of Orion's MS Exchange Sync for Contacts, Tasks & Appointments with support for MS Graph
- Orion's Productivity Pack now supports MS Office 365 64-bit
- Orion's Document Assembly Manager now supports MS Office 365 64-bit

### Firm Management

- Enhancements to A/R Collection Manager to better track and report on the submission and appeal process for electronically submitted invoices
- Setup of email recipients for A/R collections simplified by allowing parties identified to receive invoices by email to also be setup for A/R Collections Communications
- Improvements to the Client/Matter intake process to include the ability to copy an existing Matter (to set up a New Matter) as well as the option to move a Matter in the intake process to another client
- Added the option to export stored images of vendor invoices, receipts from Orion's Reimbursement Manager, Vendor W-9s, A/R Checks/Deposits, GL Journal Entry backup, etc. to PDF
- Expanded support to schedule exporting of reports to PDF to preset directories

*For more information about Orion Version 5.2 or other products visit*

**[www.orionlaw.com](http://www.orionlaw.com) or email [info@orionlaw.com](mailto:info@orionlaw.com).**

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