Lawyer ERP

Meeting Agenda with Andrew

Topics:

1. **Default Privileges for Matter**
2. **Time Sheet Approval**
3. **DMS Email Integration**
4. **Report Formats**

Application Menu Structure

1. **Dashboard**
2. **CRM**
   - **Contacts**
   - **Events**
   - **Proposals**
3. **Client and Matter**
   - **Clients**
   - **Matters**
   - **Conflict Check**
4. **Collaboration**
   - **Calendar**
   - **Task**
   - **Email**
5. **Time and Expense**
   - **Listing**
   - **Grid**
6. **Workspace**
   - **Library**
   - **Knowledge Base**
   - **Matter Workspace**
7. **Billing**
   - **Invoicing**
   - **Payments**
8. **Accounting**
9. **Client Access**
   - **Bulletins**
   - **Reporting**
   - **Appointments**
   - **Billing History**
   - **Documents**
10. **Settings**
    - **Notifications**
    - **Setting Menu**