

# RedView

Legaltech for the Business of Law

---

# What is RedView?

- RedView is an integrated ecosystem of “extension” products for practice management systems.
- What is an extension product?
- With Chrome, when the product doesn’t do everything, you need you install an extension.
- RedView does the same for case/practice management systems.



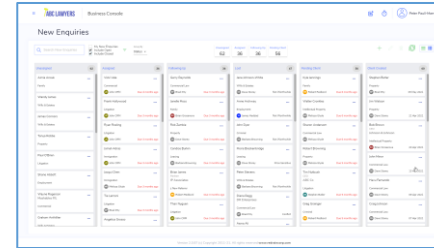
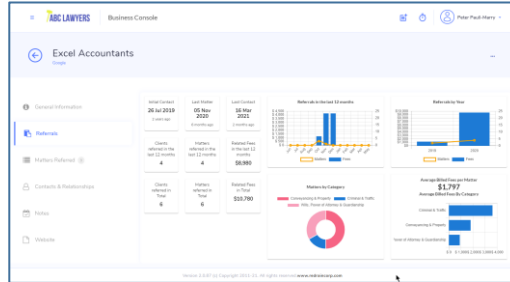


# Goals

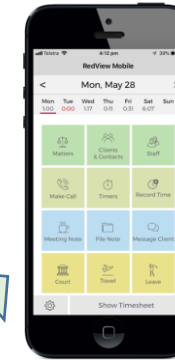
- Supplement the PMS with functionality it doesn't provide
- Provide lawyer focused solutions
- Cloud-based tools that can be accessed anywhere, anytime without the need for VPN, remote access etc..
- Native smartphone apps for mobile access
- Seamlessly integrate with Office 365
- SaaS technology to deliver new features quickly and easily
- Be quick to install & implement and need minimal or no training

## Tasks/Concierge

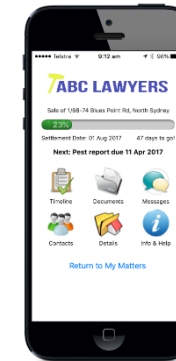
## CRM



## Lawyer Mobility & Time Recording

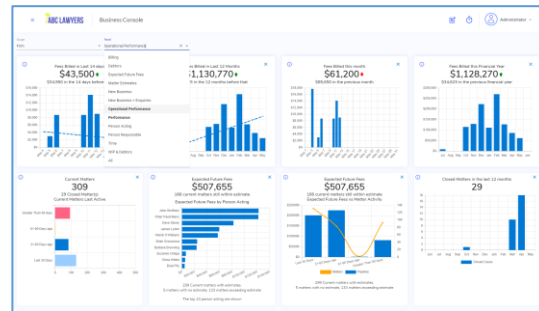


## Secure Messaging

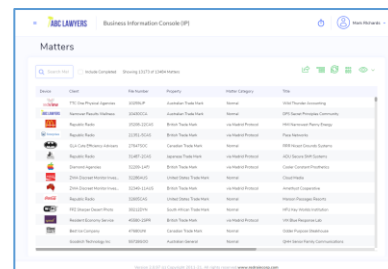


## Client Mobility

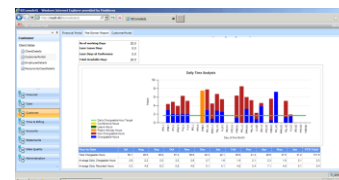
## Business Intelligence



## Lawyer Desktop & Time Recording

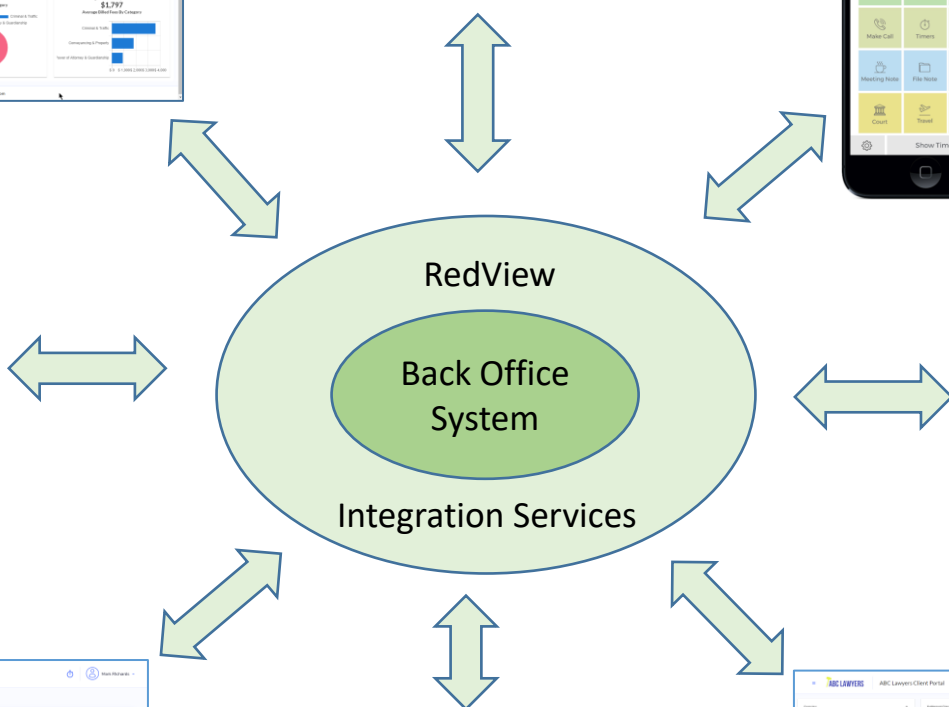
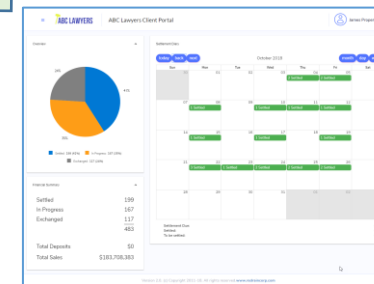


## Reporting/eStatements



On Premise (selected systems)

## Client Web Portal

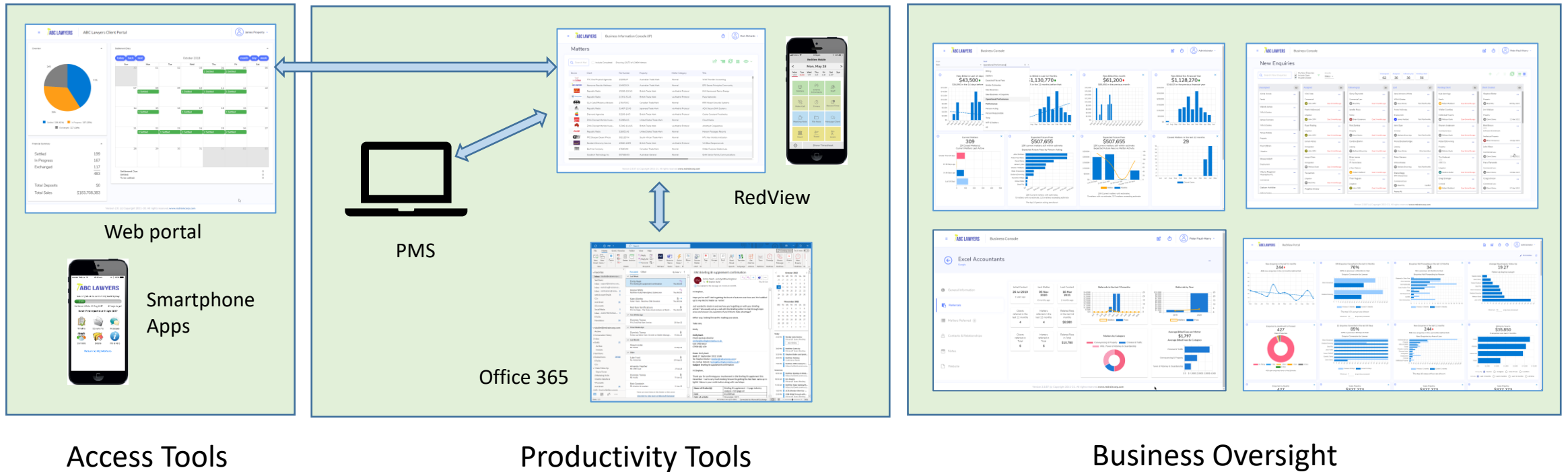


# The RedView Working Environment

Clients & Associates

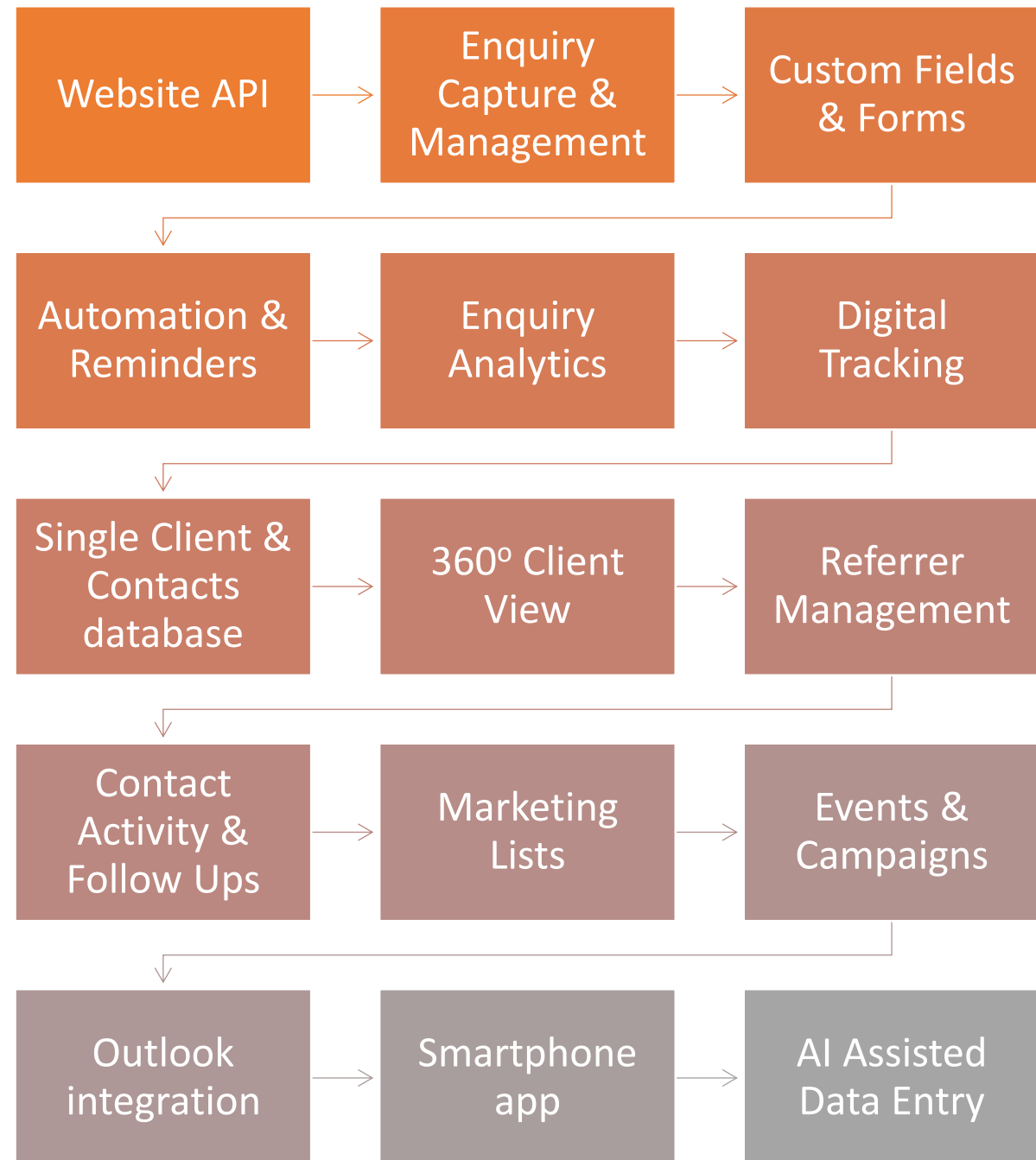
Lawyers & Practitioners

Partners & Management

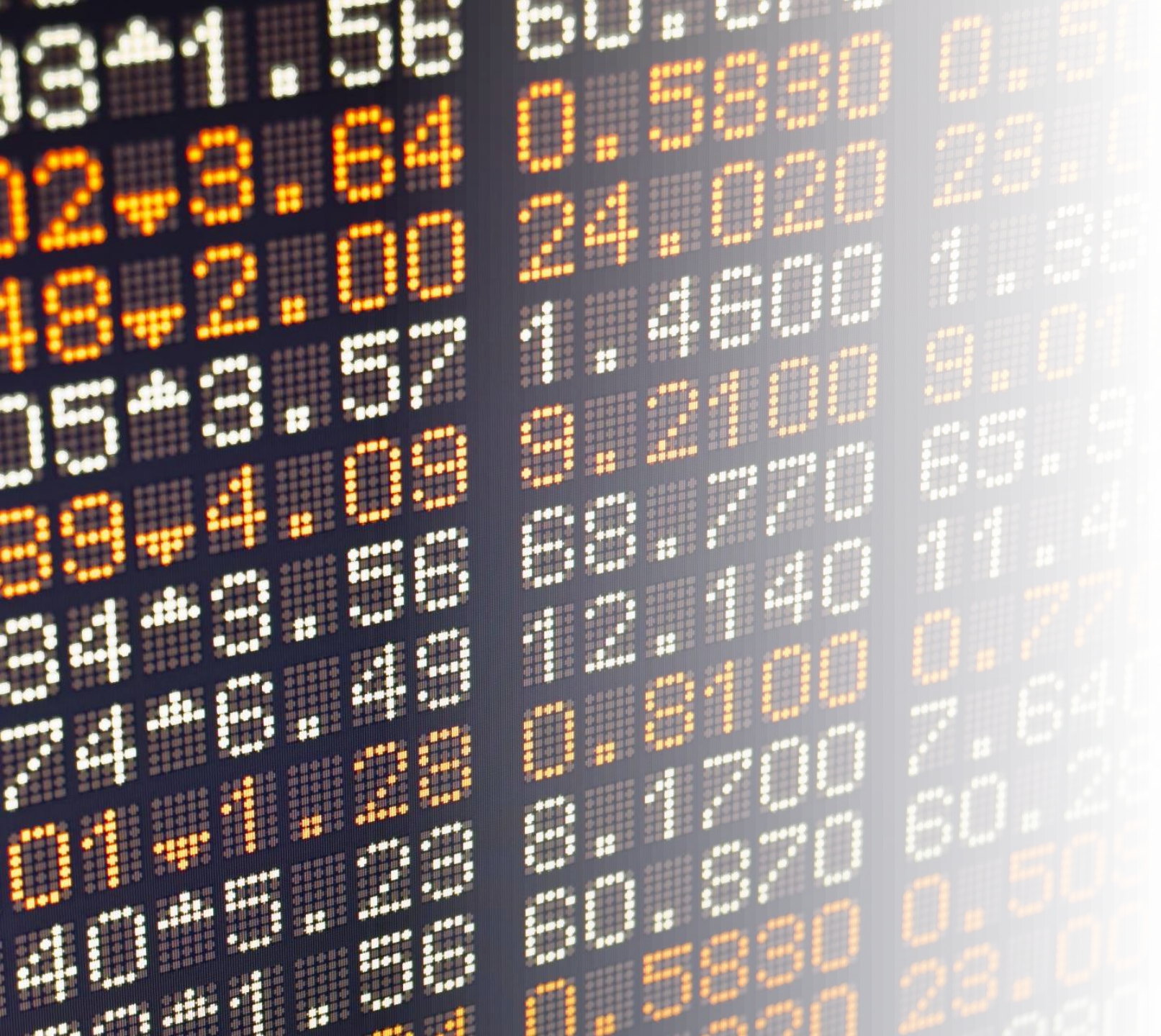


# RedView CRM

A complete,  
end to end  
CRM solution  
for law firms







## RedView Acuity

---

- Configurable Business Intelligence
- Firm & Fee Earner dashboards
- Oversee, drill down and follow up
- Structures for Teams, Departments, Offices
- User assistant access
- Staff budgeting
- Matter Lists
- Forecasting

# RedView Connect



Client B2B Web Portal



Smartphone access



Matter information & documents



Client Dashboard



Document upload, new instructions, messaging



# RedView Tasks

- Simple task logging
- Outlook integration
- Manage tasks for teams of people
- Reminders
- Kan Ban Boards
- Firm wide monitoring
- Management analytics



# RedView Concierge



Streamlined Phone  
message  
management



Message taking  
automation



Integrated with  
PMS contact data



Outlook add ins



Reminders



Firm wide message  
monitoring




# RedView Desktop

- A browser-based timesheet for simple capture of time
- Simple and rapid access to client and matter information
- A 360<sup>0</sup> view of client data, consolidating financial information
- An Outlook add in to access your timesheet and record time
- Access and delegation control

# Office 365 Integration

- Outlook Add Ins
- Actionable messages

Phone Message



**Phone Message for Anderson received from Abram Cook - 0455123963, message taken by Simon Butler**  
Last Updated Wednesday, July 24, 2024 01:04 PM

Description: Phone call from 0455123963

Call Received: 24 Jul 2024 11:04 PM

Priority: No Priority

Message Title: PhoneTask Sale wth Matter

Notes: Sale

Due Date: 31 Jul 2024 08:36 PM

Owner: Anderson

Assigned By: Simon Butler

Matter: 200003 (Sale)

Client: Test 123 Org

Returned Call

Left Message

Assign

View Task

New Task

CRM

Phone Message

Acuity

Timeslip

RedView

RedView CRM

Existing Contact (pp@firm.com - 0099)

CLEAR

CLOSE

Contact \*

Peter MacGregor

User \*

Peter Paul-Marry

New Activity

Matter Type	Matter No.	Matter Title	Person Acting
Sale	24-1353	Sale of 67 Latrobe apartment	Dave Storey
Employment Dispute	24-1212	Employment Dispute	Olivia Wilder

Address

13, Padstow Road, Eight Mile Plains QLD 4113

Contact Details

marketing@redraincorp.com

0416 773 665

9899 8899

Contact Information

Tags

Client Importance: B - Important Client

Mailings: Newsletter

Relationship Manager

Peter Paul-Marry

Relationship Quality

★★★★☆

Marketing Consent

☒

UPDATE CONTACT INFORMATION

Background Information

Peter prefers to be called Pedro. He has a strong interest in spo...

Recent Activity

Date	Activity
10 Jul 2024	Peter Paul-Marry good discussion
8 Jul 2024	Peter Paul-Marry good email
2 Jul 2024	Invite to November Barristers and Solicitors
24 Jun 2024	Peter Paul-Marry spoke again about patent work

New Task

CRM

Phone Message

Acuity

Timeslip

RedView

RedView Time

Timeslip (pp@firm.com - 0099)

TIME ENTRY

TIMESHEET

KPIS

Mon 1:00

Tue 0:00

Wed 0:00

Thu ✓ 0:00

Fri 0:00

Day Totals

0 chargeable unit - \$1312.5

0 non-chargeable unit

2 items in draft, 65 units

<

Thu Jul 25 2024

>

MV

24-1190

Mr Lance Liopold

Submitted

Motor Vehicle Accident - T. Liopold, Waverton NSW

MV

19-0007

Mrs Diana Ruddolph

5 Units

Draft

Motor Vehicle Accident

Pu

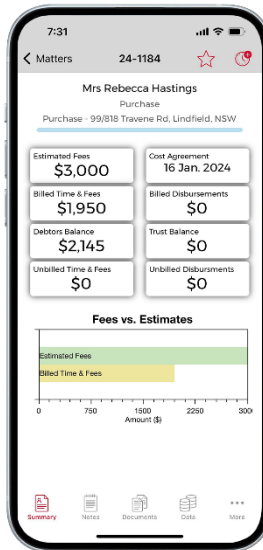
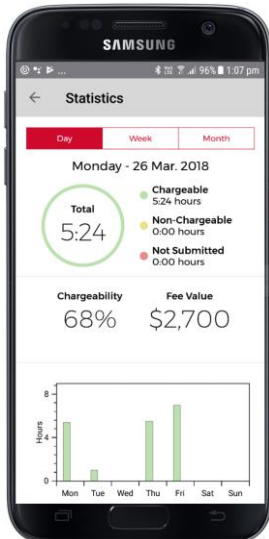
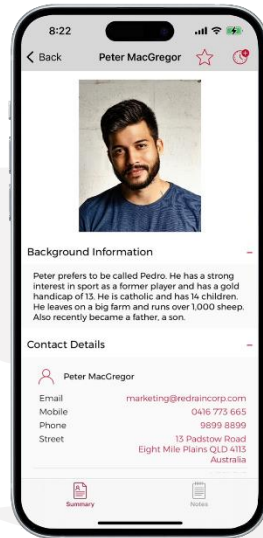
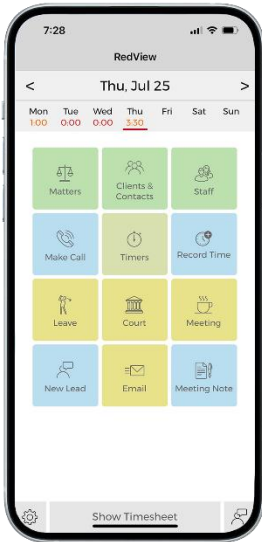
19-0020

Ms Jane Rutter

60 Units

Draft

Purchase



# RedView Mobile

- Information on the go
- Client marketing information
- New Enquiry Capture
- Meeting note capture
- Time recording
- Personal Performance KPIs
- Native Apple & Android apps