

DIGITAL TRANSFORMATION



e-Billing & Vendor Management



EVOLVE WISELY

Index

1. About MATTERLINQ

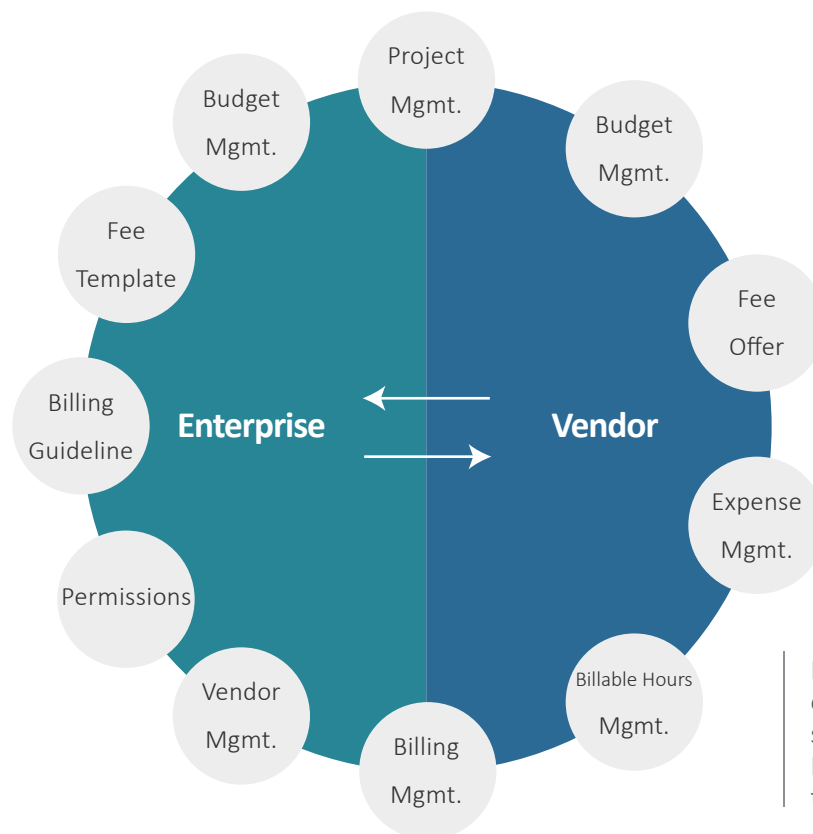
2. Key Modules

- a. Project Management
- b. Budget Management
- c. Fee Management
- d. Billing Management
- e. Permissions
- f. Vendor Management
- g. KPI & Report
- h. Generative. A.I

About MATTERLINQ

Designed for Corporate e-Billing & Vendor Management

MATTERLINQ ensures that bills submitted by vendors comply with enterprises' business rules through the powerful billing guideline function and machine learning capabilities. Enterprises can collaborate with multiple professional service providers, managing internal and external requests on the same platform. MATTERLINQ helps enterprises greatly save manpower and time costs and effectively improve the efficiency and accuracy of reviewing bills.



MATTERLINQ provides the ease of integration and high scalability of a complete RESTful API, and continues to grow the ecosystem.

About MATTERLINQ

Key Modules

Project Management

Project-centric, streamline work and collaborate effectively.

Budget Management

Internal multi-layer approval, and track internal and external budget percentages in real time.

Fee Management

The enterprises create the fee template, and the vendor submits the fee offer.

Billing Management

Setting billing guideline to automatically review the bills comply with enterprises' business rules.

Permissions

Customized multi-level privilege configuration based on roles and objects to meet the complex logic requirements of enterprises.

Vendor Management

Manage and collaborate with multiple vendors in a single platform.

KPI & Report

Intuitive KPI real-time monitoring provides strategic reference indicators for management.

Generative A.I.

Simplify your document writing process with A.I. generation tools.



Comprehensive

Internal and external management integration: All data is stored centrally, so that you can fully grasp each project's progress and expenditure and help you plan and manage reasonably.



Discover Insights

Discover Insights: Gain a competitive edge by delving into vendor relationships, understanding cost structures, and unlocking global business opportunities on our platform. Achieve unparalleled transparency and seize lucrative prospects for both businesses and service providers.



Safety Compliance

Fully encrypted data transmission and storage, effectively protect all data, without worrying about exposure to corporate information. The comprehensive and rigorous authority allocation helps enterprises reduce risks and meet compliance standards.



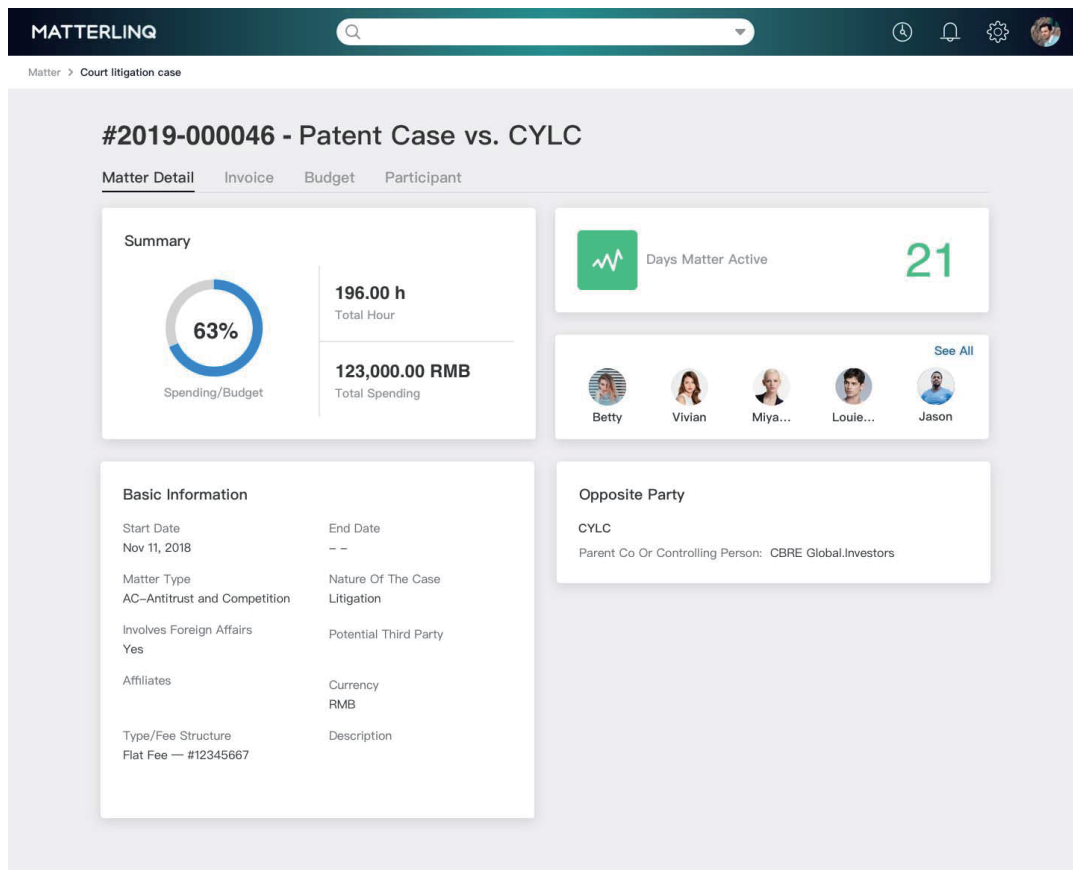
Intelligent Insight

Assist decision making: Insightful information enables enterprises to make strategic spending decisions and implement their policies effectively. Powerful KPI and big data universal searches provide management insight into the complete picture of vendors and timekeepers.

Project Management

Project-centric Effective collaboration with internal and external

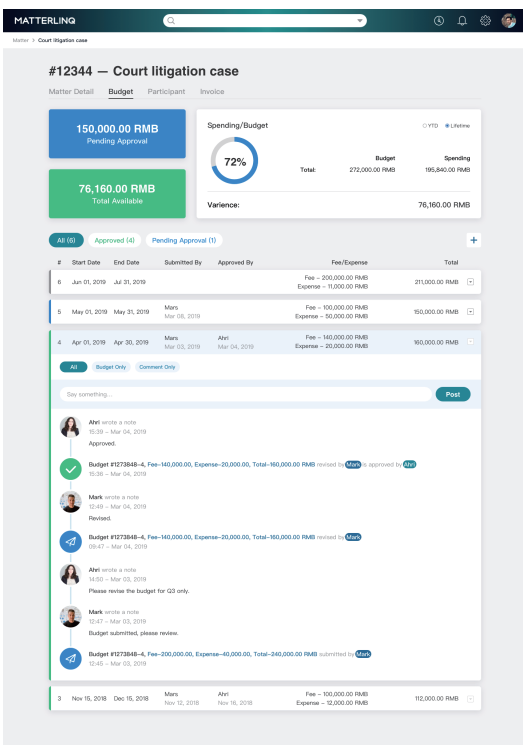
Project-centric makes corporate work more convenient and intuitive. The basic workflow is streamlined, and the team can collaborate more effectively in their roles through enterprise-level permission management. MATTER-LINQ provides powerful e-Billing functions such as collection, organization, tracking, auditing, and reporting so that enterprises can fully grasp all project information.



Budget Management

Intuitive Budget Status Internal & External Budget Approval at Multiple Levels

With permission management, multi-level approval of a project's internal budget can be performed in MATTERLINQ. On the budget list page, you can intuitively understand the internal total budget, the budget approved by the outside vendors, and the percentage of the bill amount approved. Helping the enterprises track the internal/external budget progress and expenditure percentage of the project in real-time.



Leave Comments

MATTERLINQ provides message function, which can renegotiate the budget proposed by external service providers to run effective two-way communication and reduce additional costs.

See your budget status at a glance and track your project budget in real time

Fee Management

Enterprises Create Templates

Multiple Vendors Submit Offers

Manage multiple fee offers from multiple service providers for different project types. An enterprise formulates a fee template, and a service provider can submit a fee offer according to its template.

After the service provider submits the fee offer, the enterprises can select the preferred service provider to cooperate with the chosen offer and effectively formulate the charging rates for subsequent project collaboration. The template can be created by different project types; it supports fixed rates, billable rates, and even mixed. It enables enterprises to control, predict and effectively reduce the cost of selecting service providers.

- Create different fee templates for different project types
- Automatically review the fee offers submitted by service pro-

Fee Offer ID	Firm	Effective Date	Offer Amount	Last updated
#1238112	Stems & Lockhart Law Firm	Dec-01, 2019	30,000.00 RMB	Dec-01, 2019 Updated by Julius Cain
#1238145	Stems & Lockhart Law Firm	Jan-21, 2018	5,000.00 RMB	Jan-01, 2018 Updated by Julius Cain
#1238132	Stems & Lockhart Law Firm	Dec-15, 2019	10,000.00 RMB	Jan-14, 2019 Updated by Julius Cain
#3238112	Stems & Lockhart Law Firm	Dec-01, 2018	40,000.00 RMB	Oct-01, 2018 Updated by Julius Cain

Billing Management

Offer a streamlined setup for billing standards, enabling the automatic adherence of service provider invoices to businesses specifications, thereby reducing manpower and time spent on auditing costs.

Businesses can customize rules to their specific requirements, leveraging automated audits within the system to reject or issue warnings for non-compliant invoices. This automated workflow enhances overall efficiency, precision, and cost-effectiveness, ensuring that service providers comply with regulations and effectively implement invoice standards.

Business Rules — Invoice Validation
Business Rules

Budget Validation 3009 By turning on this rule, the firm will not be able to submit an invoice without a budget being approved prior invoice submission.

budgetValidation 1009 By turning on this rule, system will validate the invoice against the available budget of the matter.

▼ Fees

#	Date	Timekeeper	Task /Activity Code	Description	Rate	Hours	Adjustment	Total
1	2018/10/19	Louis Litt	X102	Basic paperwork	100.00	12	-100.00	1,100.00

Reason:

Subtotal: 1,100.00 USD

▼ Expenses

#	Date	Participant	Expense Code	Description	Unit Cost	Units	Adjustment	Total
1	2018/10/19	Candice Yao	X102	Flight Ticket for Business Trip to ...	399.00	1	0.00	399.00

Subtotal: 399.00 USD

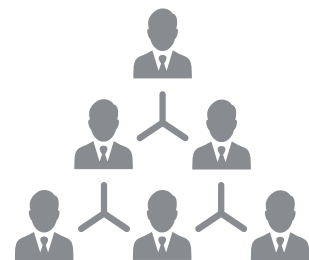
Enterprises can dispute the the single item individually and select the reason tags

Permissions

Comprehensive & Rigorous Permission Configuration

Permissions can be customized with multi-level permission configuration based on roles and objects to meet the complex logic requirements of enterprises.

Based on job functions to give specific users corresponding permissions. Flexible permission configuration enables different users to exercise access/edit/manage information related to their job roles. A user can even be assigned multiple role permissions to achieve a flexible set of permissions configuration functions.



User Permissions User Group Permissions

Enterprises can set up a group of many users and grant permissions to the entire group. The user group permissions will be added to the single user permissions, so that the users in the group will get the group permissions.

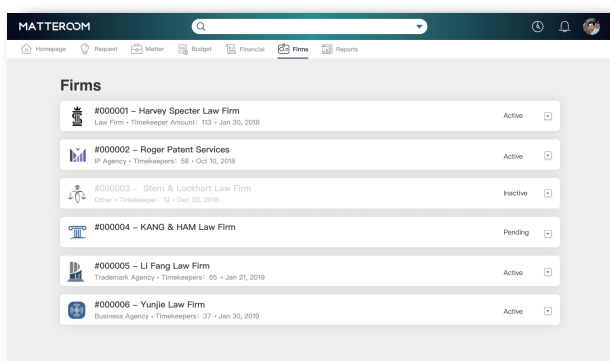
Vendor Management

With a one-to-many feature, enterprises can manage and collaborate with multiple vendors in a single platform, such as law firms, accounting firms, consulting firms, and other professional service firms. MATTERLINQ quickly and comprehensively integrates different data types such as projects, budgets, expenses, fees, billable hours, documents, and communications. With MATTERLINQ KPI, enterprises can compare multiple service providers comprehensively and multi-dimensionally.

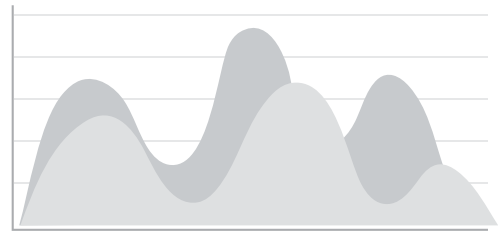
Enterprises can view the information of service providers, such as timekeepers and their rates, so as to have a comprehensive understanding of many different service providers and quickly obtain multi-party information.

Connect Vendors

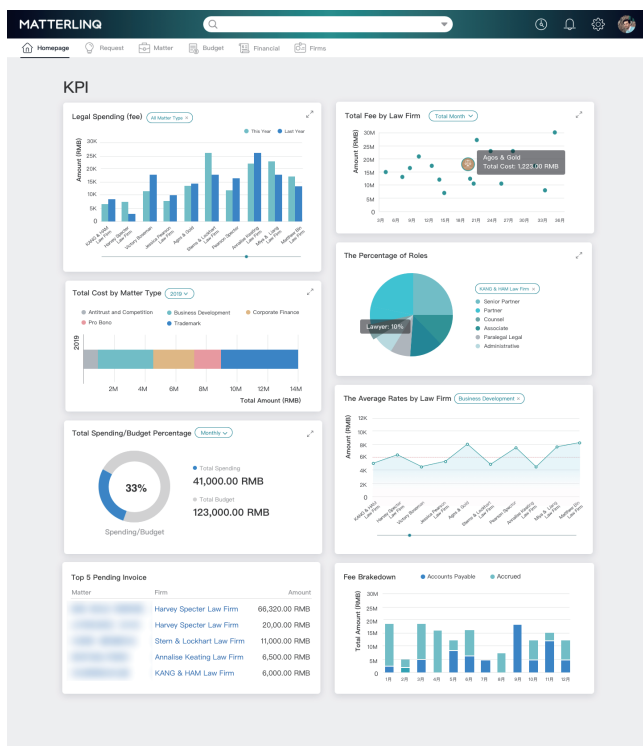
After connecting, the service provider can quickly and easily record timesheets and expenses, submit fee offers and budgets, etc. in MATTERLINQ. Vendors can instantly access and track each item of Project information, submitting bills that meet enterprises' billing guidelines.



KPI & Report



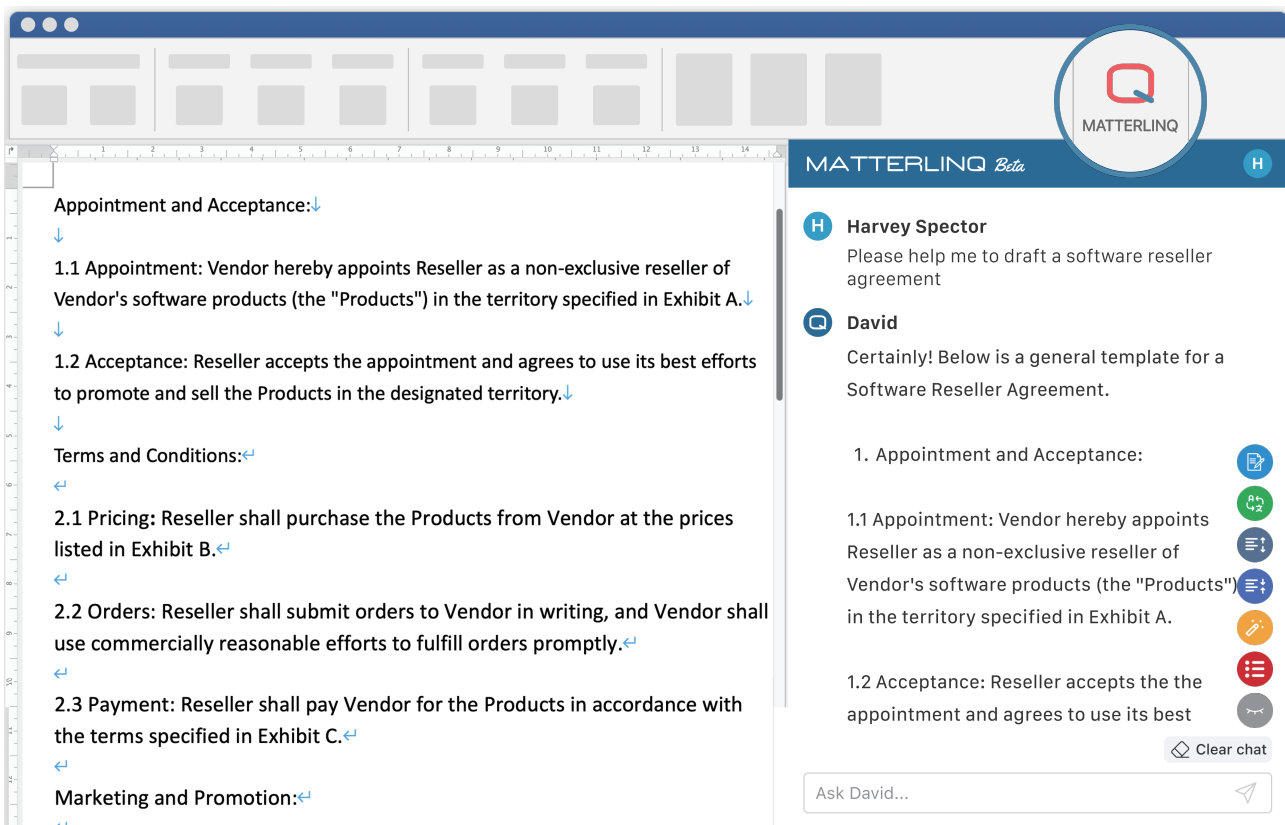
MATTERLINQ's powerful KPI and big data universal search bring complete information, so that management can gain insight into overall data indicators such as various project expenditures, service provider fee rates, expenditure ratios, and export reports as a strategic reference basis.



Modules can be configured according to customer's requirements to provide strategic reference indicators for management. The intuitive KPI monitors the data of each dimension in real time, helping the project management and the person in charge to understand the data of the project type and the proportion of expenditures of the cooperative service provider in real time.

Generative AI

Our Generative AI Plugin for O365, enabling real-time interaction to streamline document creation. Experience faster drafting of contracts, documents, and emails with intelligent suggestions and instant assistance, revolutionizing your workflow.



LEWIS
LWEE

WISE
LY