



# RELAY Software, Inc.

www.relayworks.com

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## Relay File Open

### Relay File Open

Relay File Open is the single entry point for Client and Matter data for your firm. The system is independent of your Accounting, Time & Billing, Document Management and Records systems. Relay File Open retrieves information from any of these systems.

Our wizard interface and workflow prompt the user for only the necessary information at each step in the workflow. Relay File Open then guides the information through **your** intake and approval processes. This streamlines the intake for the specific type of client or matter to be opened. Once completed and approved, Relay File Open writes the data to one or all of these systems, as well as notifies users that the process has been completed.

## Advantages

### Relay File Open gives you these advantages:

- The entire Relay software suite uses your existing data so there is no conversion to use Relay.
- Wizard interfaces guide you through your firm's process and eliminate useless data entry.
- A web-based interface eliminates the need for client-side installation or maintenance.
- Document Management and Imaging Integration track Retainer, Waiver, and Engagement Letters.
- Relay File Open integrates with Records Management.
- Relay File Open automatically exports and imports data into your current systems using existing vendor interfaces.

# Integration

Relay File Open integrates with standard email systems to provide email-based notifications.

The notification alerts the user at the exact moment your attention is required and contains an embedded link to take you directly in Relay where the action is needed.

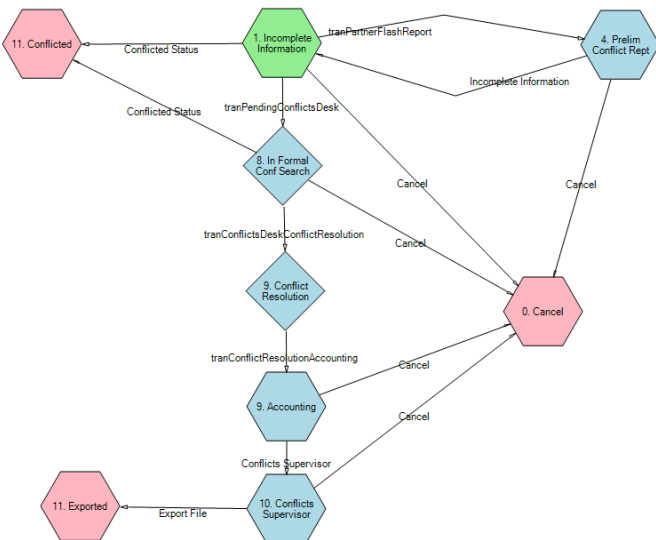
Relay File Open integrates with

Interwoven, Interaction, CMS Open, Elite, or any other SQL-based system to utilize existing data. Relay collects the existing data and new information your process requires, including waiver letters, engagement letters or any other needed information.

When the information gathering and conflicts reporting process has been completed and approved, Relay then writes the data to one or all of these systems. In short, Relay eliminates the need for creating synchronization processes after a file is opened.



# Custom Workflow



**All law firms do business differently.**

There is no process where this is more pronounced than New Client and Matter Intake. Relay File Open was designed from the ground-up to be fully customizable and flexible to meet your firm's changing needs.

Before a single line of code is written, we meet with you to discuss the overall goal of the project. The first phase of implementation is to develop the "statement of work" which will guide the rest of the project.

The statement of work is part of our commitment to the firm as a development

partner. Our technology is extremely flexible and allows us to address features you need that are not currently in the suite without a long wait.



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