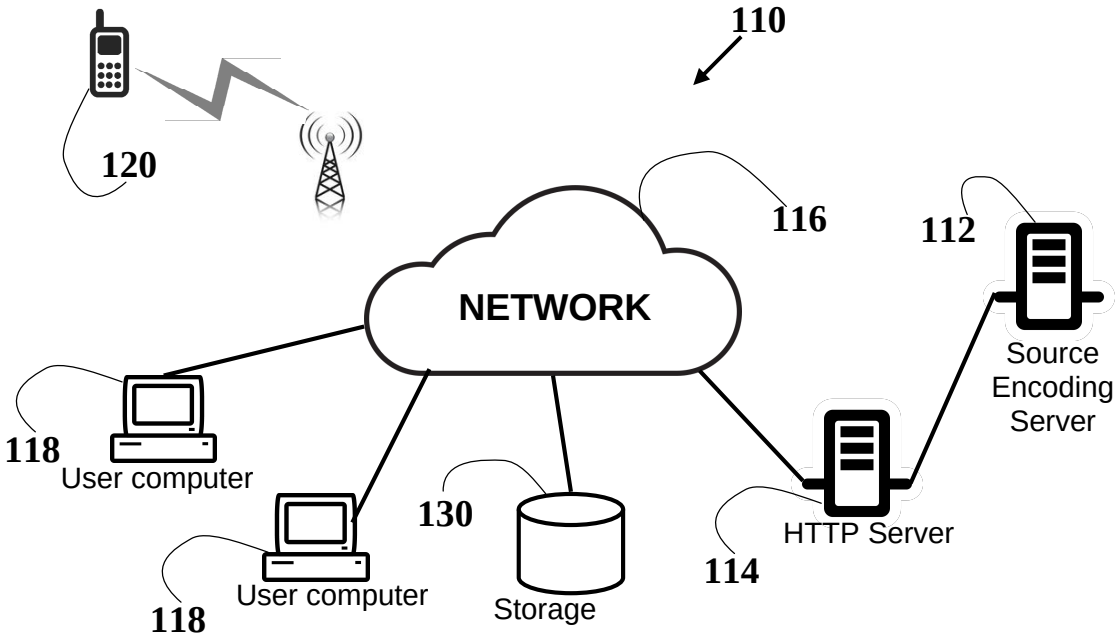


**Figure 1**

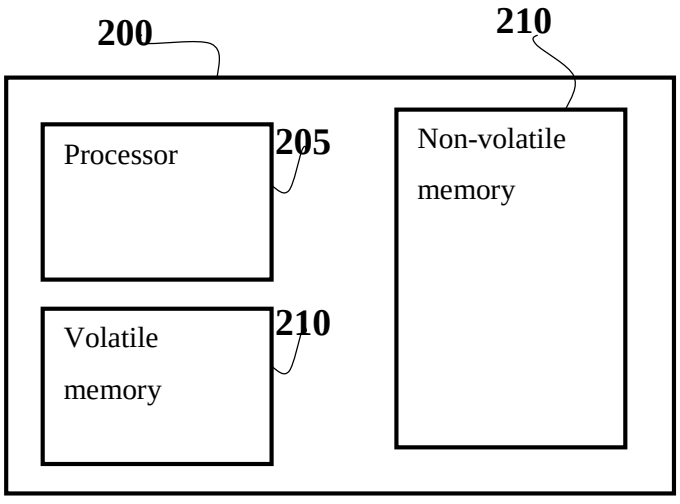


**Figure 2**

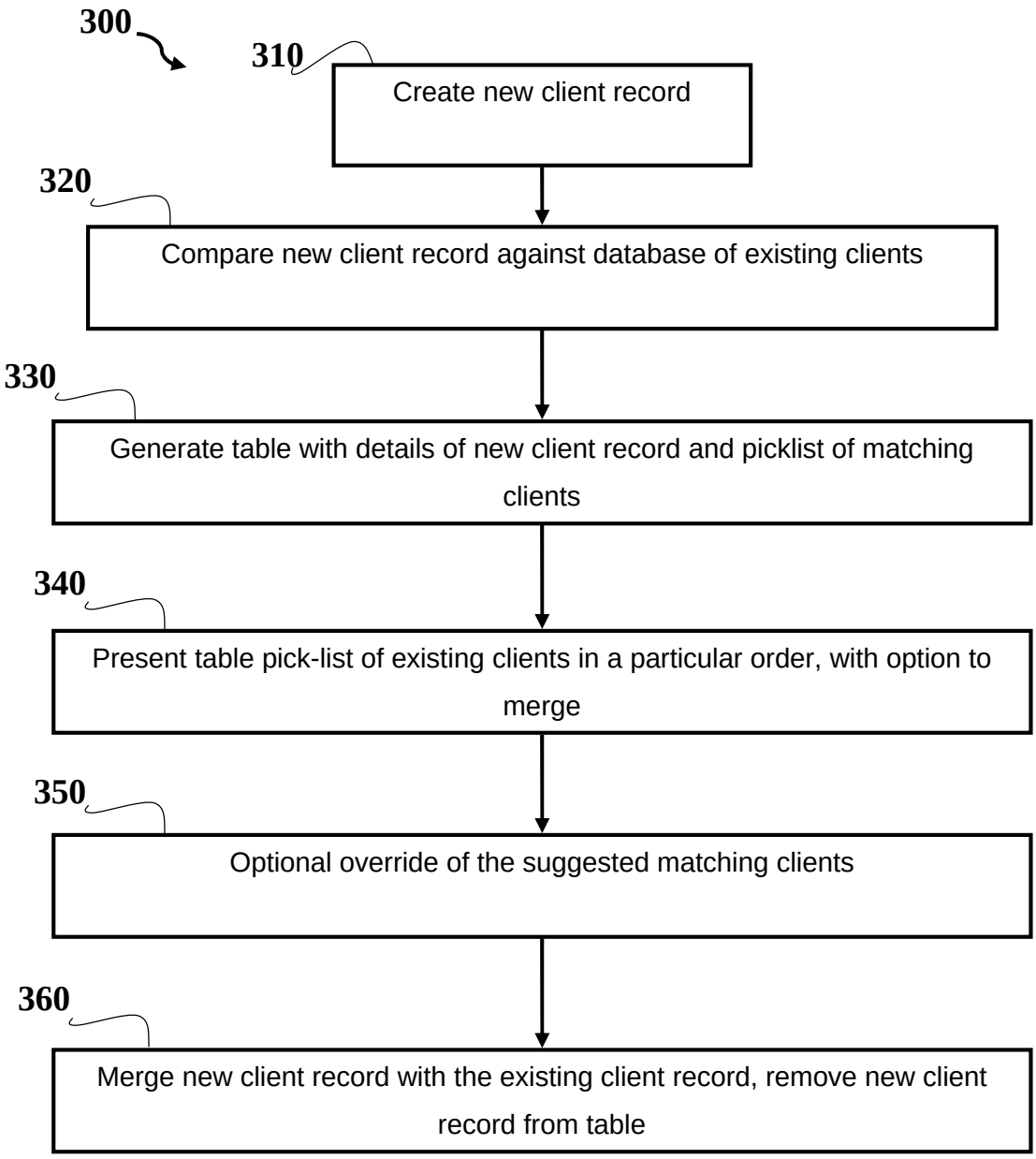
300
310
Create new client record
320
Compare new client record against database of existing clients
330
Generate table with details of new client record and picklist of matching clients
340
Present table pick-list of existing clients in a particular order, with option to merge
350
Optional override of the suggested matching clients
360
Merge new client record with the existing client record, remove new client record from table

**Figure 3**

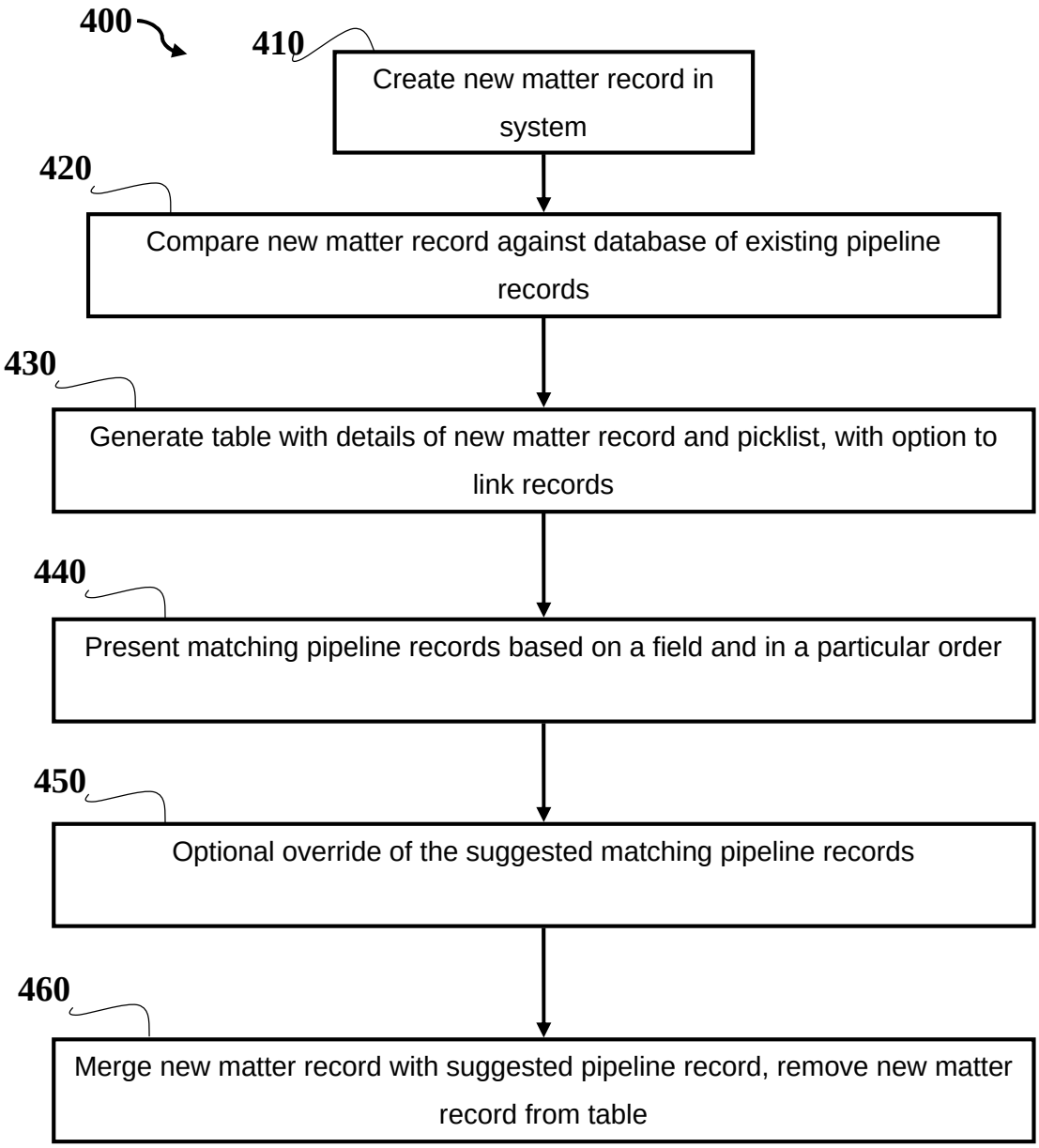
400
410
Create new matter record in system
420
Compare new matter record against database of existing pipeline records
430
Generate table with details of new matter record and picklist, with option to link records
440
Present matching pipeline records based on a field and in a particular order
450
Optional override of the suggested matching pipeline records
460
Merge new matter record with suggested pipeline record, remove new matter record from table

**Figure 4**

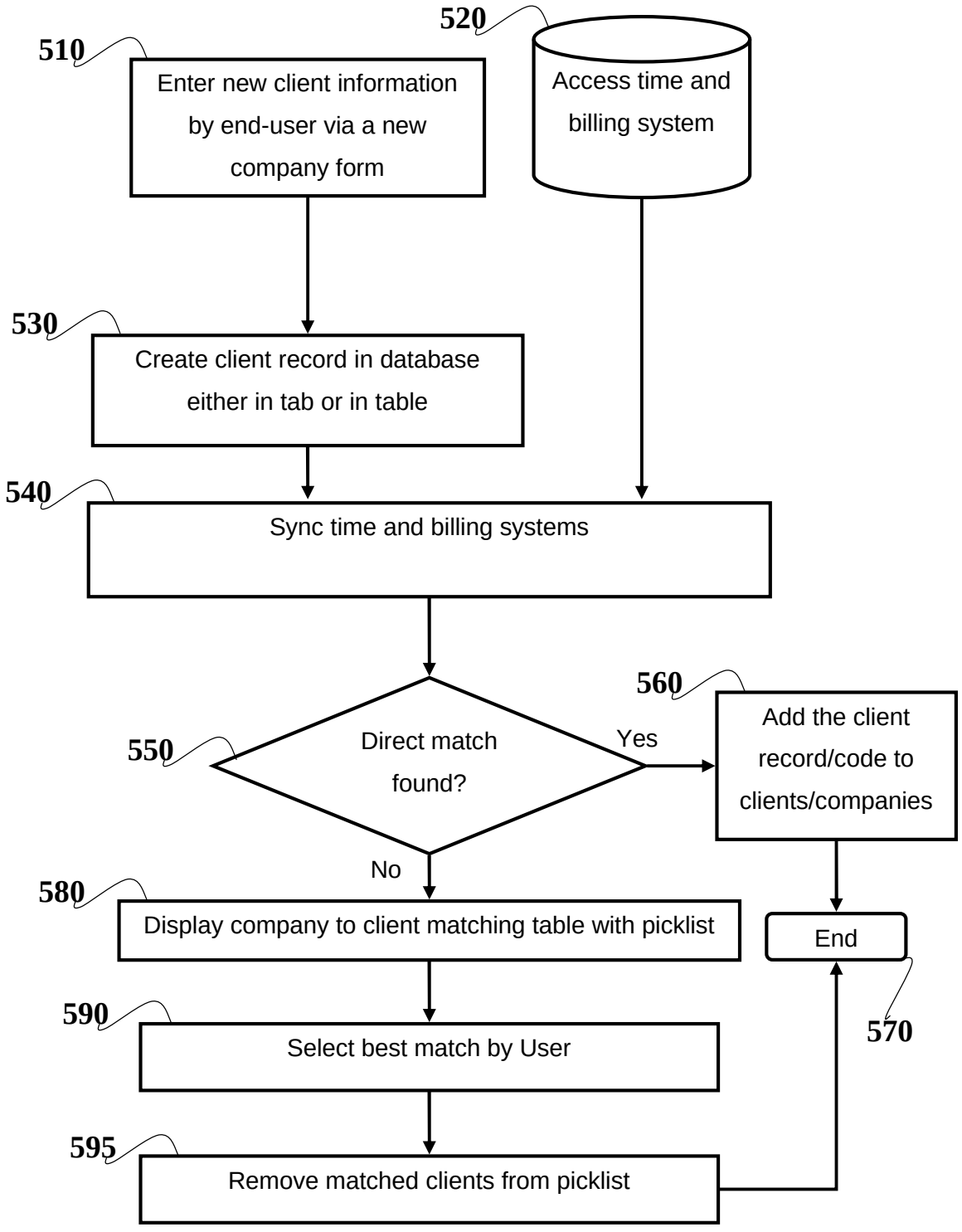
510
Enter new client information by end-user via a new company form
520
Access time and billing system
530
Create client record in database either in tab or in table
540
Sync time and billing systems
550
Direct match found?
Yes
No
560
Add the client record/code to clients/companies
570
End
580
Display company to client matching table with picklist
590
Select best match by User
595
Remove matched clients from picklist

**Figure 5**

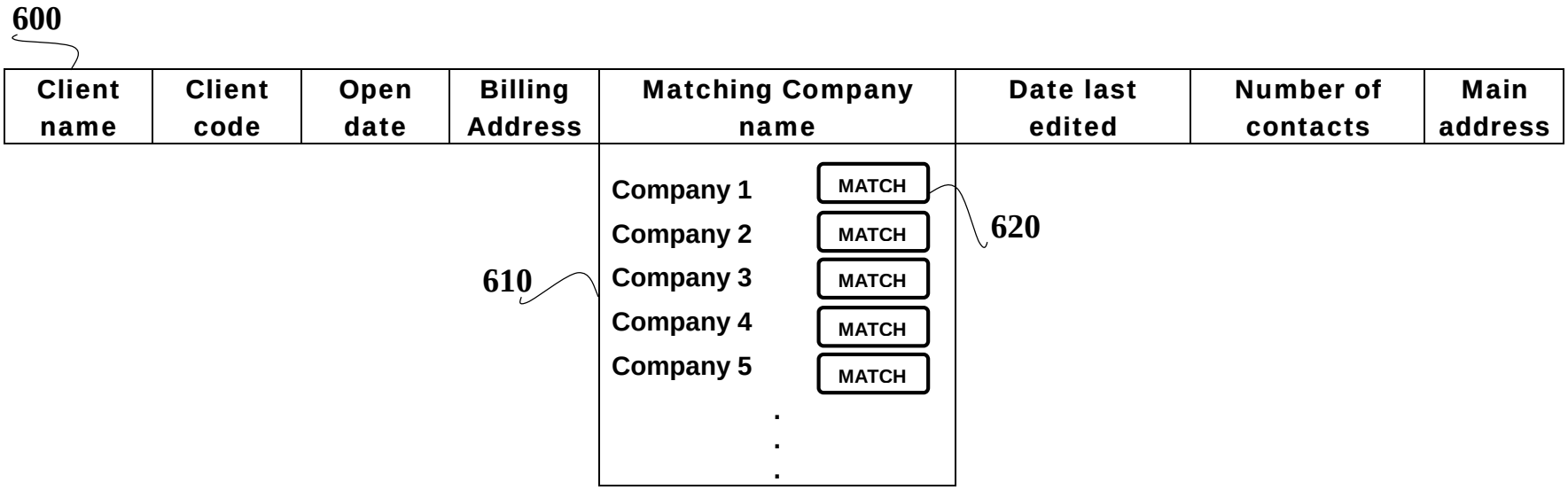
600
Client name
Client code
Open date
Billing Address
Matching Company name
Date last edited
Number of contacts
Main address
Company 1
Company 2
Company 3
Company 4
Company 5
MATCH
MATCH
MATCH
MATCH
MATCH
610
620

**Figure 6**

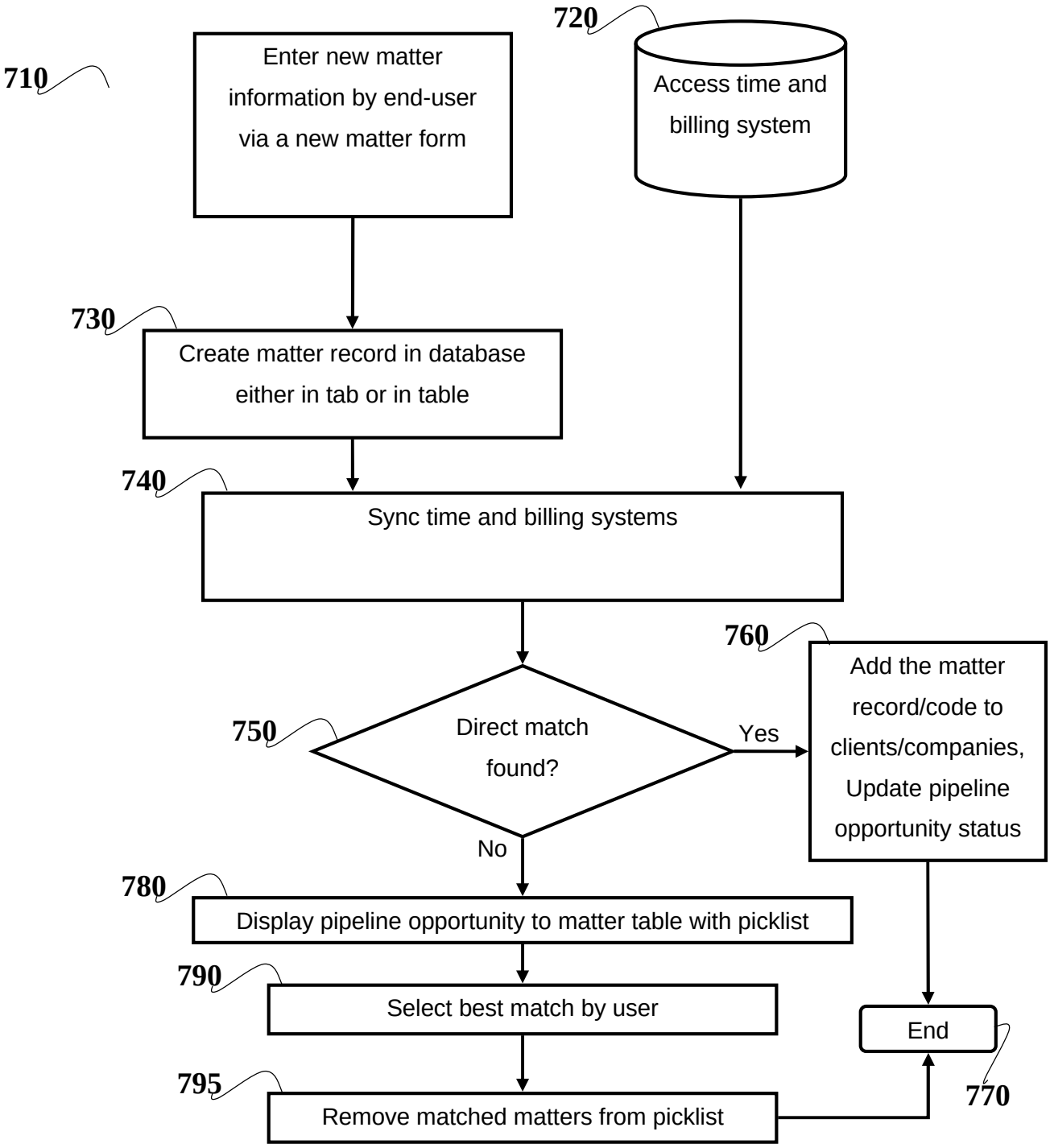
710
Enter new matter information by end-user via a new matter form
720
Access time and billing system
730
Create matter record in database either in tab or in table
740
Sync time and billing systems
750
Direct match found?
Yes
No
760
Add the matter record/code to clients/companies, Update pipeline opportunity status
780
Display pipeline opportunity to matter table with picklist
790
Select best match by user
795
Remove matched matters from picklist
End
770

**Figure 7**

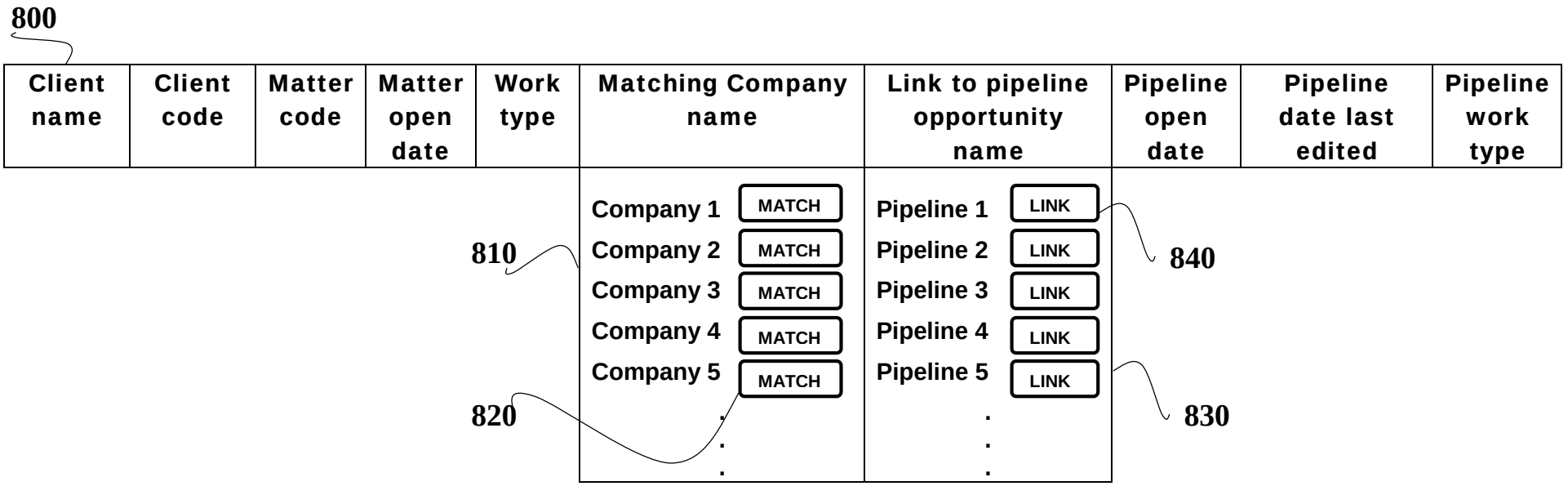
800
Client name
Client code
Matter code
Matter open date
Work type
Matching Company name
Link to pipeline opportunity name
Pipeline open date
Pipeline date last edited
Pipeline work type
Company 1
Company 2
Company 3
Company 4
Company 5
MATCH
Pipeline 1
Pipeline 2
Pipeline 3
Pipeline 4
Pipeline 5
LINK
810
820
830
840

**Figure 8**