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# TeamConnect 8.0 Hype Video



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# Release Webinar: TeamConnect 8

November 12, 2025



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# Housekeeping

- Webinar recording and slides will be emailed following the session
- Questions at the end and you can type questions into the Q&A as we go
- Please look out for our post-webinar survey

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# Meet the Team



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# Today's Agenda

- Introduction to TeamConnect Version 8
- ARIES™ with New User Experience
- InvoiceIQ Learning Lab
- Outlook 365 Add-in Mobile with New Invoice Approval
- ARIES™ Non-LEDES Invoice Capture – International
- Tax Authority eBilling Processes
- Modern Security and Support
- Integrated SAML/SSO
- Coming Soon!
- Preview: New TeamConnect Portal



## Security-Focused AI-Powered



8 New Ideas!

# TeamConnect v8: Your Voice Matters!

TeamConnect 8.0 delivers impact through cutting-edge platform and security upgrades, enriched by client-driven innovation and powerful AI capabilities.

[Be part of shaping the TeamConnect roadmap by sharing your ideas](#)



### Framework, JDK, and SAML/SSO Updates

Platform updates to fortify security and extend support; SAML-SSO now built into the platform; JDK 21 support



### Outlook 365 Add-in

Even more features, and now on mobile! Create matters, manage documents, and view/update appointments & tasks via O365 mobile apps + NEW invoice review feature



### ARIES – AI Digital Assistant

ARIES™ transforms data exploration with natural language queries—empowering faster decisions and eliminating the hassle of manual reporting.



### More Ideas

- Update Matter Open/Close via REST API
- Logger timeouts and audits
- Better support for non-US Tax calculations



### International Tax Support

Ensure clients and firms leverage the benefits of TeamConnect and Collaborati eBilling while following proper tax jurisdictional laws.



### Non-LEDES Invoice Capture – International

Move towards 100% e-billing data capture for international firms and non-US vendors aren't familiar with complicated LEDES invoice files.



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# ARIES™ 2.0

Instant insights at your fingertips — ARIES™ turns everyday users into data analysts by answering business questions in plain language, cutting reporting time from hours to seconds.

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# ARIES™ in Action

What firm billed the most in 2025?

Vendor Name	Total Billed
GATES & BARKER LLP	\$ 2,829,223.66

**Explanation**

I have queried the invoice details to find the top vendor with the highest total billing for the year 2025. I filtered the results to include only 'POSTED' invoices of specific types (STANDARD, CREDIT NOTE, APPEAL INVOICE), calculated the total billed amount per vendor, and selected the vendor with the highest total billing. The result is formatted to display the vendor name and total billed amount in US dollars with comma-separated thousands.

Ask ARIES™ ...

Please exclude personal and HIPAA data from your questions.

Ask questions in natural language

Receive answers as tabular data

Clear explanation of the query

Ask the next question



# ARIES™ 2.0

The image displays two views of the MITRATECH TeamConnect interface. The left view shows the main dashboard with a blue navigation bar at the top containing a 'Widgets' menu item. A callout box points to this menu with the text: "ARIES is launched from the widgets menu at the top." The dashboard includes various widgets such as 'Matters', 'Invoices', and 'Budget vs. Spend'. The right view shows the ARIES chat window expanded, featuring a header with the ARIES logo and a greeting 'Hi, Alex'. Below the header are several interactive buttons: 'Natural Language Unde...', 'AI-Enabled Answers', 'Follow Conversational...', and 'Data Privacy & Compli...'. A 'Start new chat' button is also visible. A second callout box points to this button with the text: "The ARIES widget can be moved into its own window."

ARIES is launched from the widgets menu at the top.

The ARIES widget can be moved into its own window.

# Availability

ARIES™ is available to **hosted** clients in the US data center.

Version 6.3.3 to 7.2 as a static window on the menu bar

Version 8.0 and above as a pop out window



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# InvoiceIQ 3.0 / 4.0

See the full picture from day one — InvoiceIQ now quickly incorporates your historic data, giving legal ops smarter insights and faster ROI the moment you go live.

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# Historic Invoice Categorization

## InvoiceIQ Create Historic Batches

### Set the Go-Live Date

Choose the Go Live date for InvoiceIQ. This is the day when InvoiceIQ categorization becomes a part of your organization's active workflow.

Note: Once you set the date, it can only be changed with assistance from support.

Go Live Date

10/31/2025



Set Go-Live Date

## InvoiceIQ Create Historic Batches



Notification: Go-Live date has been updated successfully.

### Select Date Range for Batch Creation

Note: Only standard or shadow invoices that are posted will be sent for categorization.

Start Date For Categorization

10/31/2024



End Date For Categorization

10/31/2025

Get Batch Info

Version 7.0 TC62 Build 262 | Copyright © 1999-2022 Mitrates Holdings, Inc. All Rights Reserved.

InvoiceIQ will allow you to set categorize invoices from the previous year or year to date.

# Line Item Flagging

InvoiceIQ

Edit

Delete

Share

Printable View

Help

Add Bookmark

Invoice	Line #	Type	Description	Category	Model Recom...
C1775623_ALQW	1	Expense	Copying (11 pages)	Copying	High
C1775623_FZoa1	1	Fee	Checking filing receipts and sending to client.	Manage Data/ File	None
C1775623_FZoa	1	Expense	Copying (11 pages)	Copying	High
C1775623_BCEa1	1	Fee	Checking filing	Manage Data/ File	None
C1775623_BCEa	1	Expense	Copying (11 p	Copying	High
Test_RFEp	1	Expense	Having meals	Meals	High
Test_rzNJ	2	Expense	Having meals	Meals	High
Test_rzNJ	1	Fee	Sending a rem	Mock Billing	Medium
Test_ZpmQ	1	Expense	Sending a rem	Records Retrieval	Low
Test_utDY	1	Fee	Sending a rem	Mock Billing	Medium
Test_utDY	2	Expense	Having meals	Meals	High
Copy of Copy of 5	1	Expense	TEST	Travel	Medium
Test_NFkd	1	Expense	Having meals at a restaurant	Meals	High
Test_sGBZ	1	Expense	Having meals at a restaurant	Meals	High

Flag Line Item

Select correct category and confirm to flag.  
Original Category: Meals  
Corrected Category: 

Travel

Confirm

Cancel

Flag Line Item

Recategorized line items are sent to the training database to be reviewed.



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# Outlook Add-in 5.0 on Web & Mobile



Do more right from your inbox, and now on the go!

The TeamConnect Outlook Add-in works on both web & mobile, with a new Quick Invoice Approval feature to keep workflows moving wherever you are.

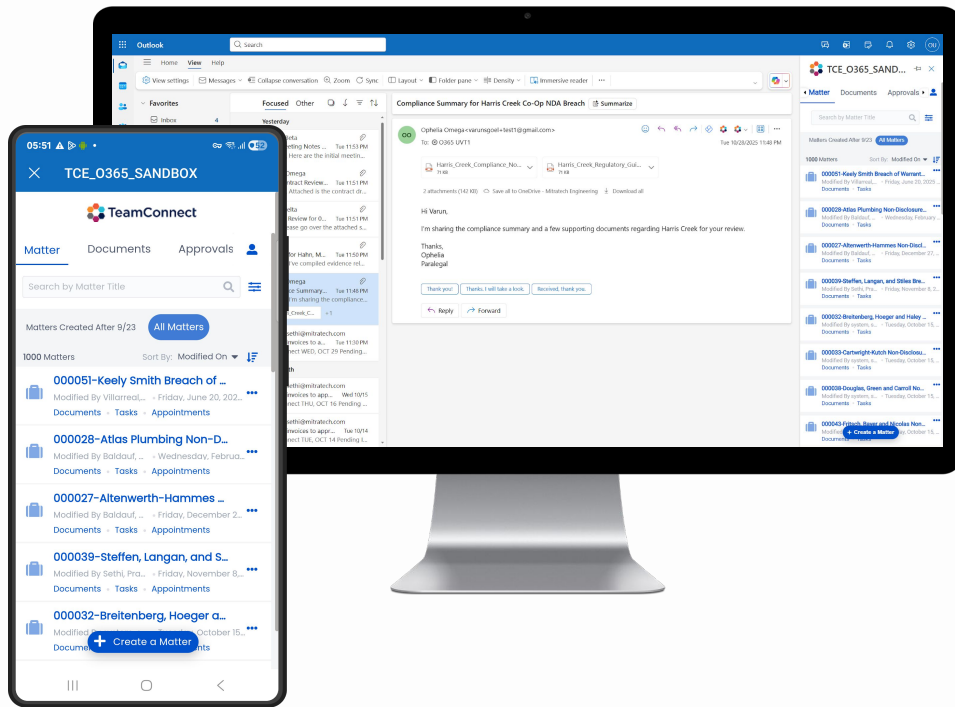
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# Outlook Add-in 5.0 on Web & Mobile

## Key Add-in Functionalities, Now Available on Mobile

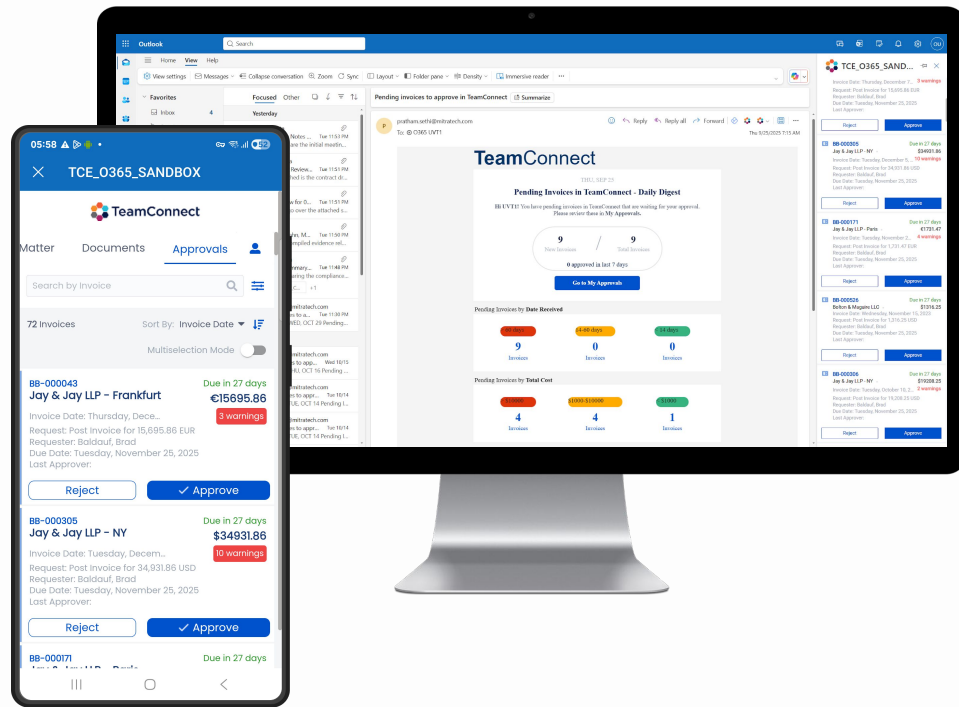
- Create & search matters
- Upload Emails & Attachments To Matters On the Go
- Manage Appointments and Leverage Two-way Sync with TeamConnect
- Manage & Complete Tasks, Including Integration with Microsoft To Do



# Outlook Add-in 5.0 on Web & Mobile

## Quick Invoice Approval on Both Web & Mobile

- View pending invoices right from your inbox and on the go
- Approve or reject invoices with a click
- View configurable details for an invoice
- Bulk approve or reject invoices
- Filter, search, and sort invoices

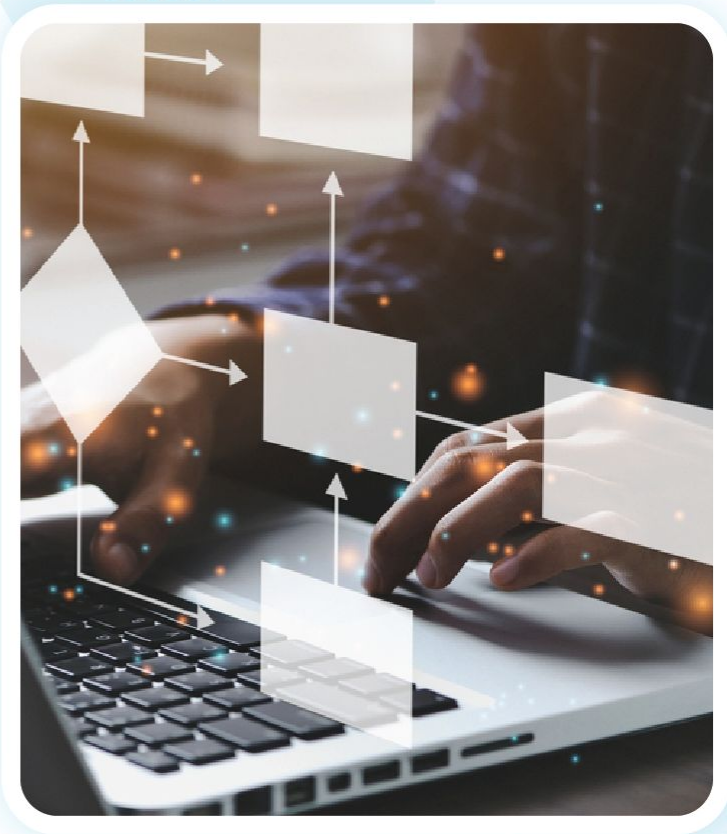




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Outlook Add-in 5.0 on Web & Mobile

# Demo



# Outlook Add-in 5.0 on Web & Mobile



## What versions of TeamConnect support the Outlook Add-in 5.0?

The Outlook Add-in v5.0 is supported with TeamConnect v8 onwards.

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## Is there a separate deployment required for mobile access?

Mobile is included with the standard Outlook Add-in deployment.

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## Which mobile operating systems are supported?

The Outlook Add-in works on both iOS and Android devices.

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## Can mobile access be disabled by the admin?

Yes, admins can disable mobile access through the Admin settings.

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## Can I control what invoice details are shown in the add-in?

Yes, the invoice fields can be configured within TeamConnect.

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## Is there a way to troubleshoot mobile issues?

Yes, users can generate and access logs for mobile activity.

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# ARIES™ Non-LEDES Invoice Capture: International Invoices

Move toward 100% eBilling capture — bringing all invoices into view across currencies to unlock better insights, stronger compliance, and smarter spend decisions.

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# ARIES™ Non-LEDES Invoices – International

Firms can upload  
PDFs in **any**  
**currency**

- Upload invoices with **international taxes** – **VAT, GST, WHT**, and others
- **Summary** level **taxes** on **Fees** and **Expenses**

• Make sure to populate the required fields below before uploading your PDF file: **Invoice Locale (US or International), Invoice Type, Bill Invoice From, Client, Matter, and Date Format (International).**

• Once a PDF file is selected, click "Upload File"

• After uploading the PDF file, the invoice data processing may take some time before it completes. Once the PDF invoice has been processed, you will get an email notification via Collaborati.

• Below are PDF Invoice Sample Files for US Invoices and International invoices. These templates with different data formats have been tested and processed successfully. It is recommended to download these sample templates to use as guidelines.

[Download Sample "Save As File Type - US PDF"](#)

[Download Sample "Save As File Type - International PDF"](#)

Invoice Type:

Client:  [Set Default Values for Client](#)

Bill Invoice From:

Matter:

US or International Invoice:

Date Format:

PDF File to Upload:  No file chosen

Jay & Jay LLP			
Moonshot Express 101 Mill St. Ste. 501 London SN14 5HL		INVOICE NO: T15021 DATE: 08 JULY 2025 Jay & Jay - London 51 Roman Rd. Chicago, IL 60603 Phone: 555-555-7882	
For the attention of: AGC Nami Milner Jay & Jay Partner: Maggie Fontaine For the period from 02 April 2025 to 06 June 2025		This is not a Tax Invoice	
Professional Fees	Charges EUR	Rate VAT	Amount VAT EUR
Provision of Legal Services	23,258.75		
Discount on Fees as Agreed	-3,258.75		
Total Professional Fees	20,000		
Net Total	20,000	20.00%	4,000
VAT at 20%	4,000		4,000
Amount Due	EUR 24,000		

Target Release: Nov. 22nd

# Non-LEDES International – FAQs

- **Do clients need to upgrade TeamConnect to get this feature?**
  - No Teamconnect upgrade is required, This is a Collaborati feature, which will be available to all Collaborati Firms/Vendors upon release.
- **Are all **invoice currencies** supported?**
  - Yes, all currencies authorized by the associated TeamConnect clients are supported.
- **Are **international taxes** (VAT or others) supported?**
  - Yes Non-US Tax Codes for Fees and Expenses are supported. They must be authorized by the associated TeamConnect client
  - Only summary level taxes are supported currently, not line item taxes
- **Will it **translate** PDF invoices in different languages?**
  - ASCII-character languages are supported but not translated.



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# CSM 8 – Tax Authority eBilling Processes

Cross-border compliance — built-in tax authority fields and functionality help you meet jurisdictional eBilling mandates while keeping approvals and reporting streamlined.

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# TeamConnect Invoice – Tax Authority Fields

- Flag **Tax Authority invoices** for easier tracking and reporting.
- **Ensure compliance** with the flexibility to adapt approval workflows and validations per jurisdiction
- Leverage Collaborati for **Pro-Forma** invoicing

Invoice - CY Italy 02

Create a Copy

Tax Authority 

Tax Authority Invoice: Yes

Pro-Forma Invoice: No

Hold for Tax Authority Approval: No

Tax Jurisdiction:

Tax Locality:

Tax Authority Ref. ID: 01102025-234405

Alternative Invoice ID: SDI-337889

Tax Authority Invoice Date: 10/2/25

# Collaborati Invoice – Tax Authority Fields

- **Fewer resubmissions** on rejected invoices due to missing tax details or file attachments
- For TeamConnect clients on CSM 8, Collaborati firm users can now **attach files** and **update Tax Authority fields** on **pending invoices** in TeamConnect

The screenshot displays the Collaborati Invoice interface. At the top, a status bar indicates 'Status: Approved' and 'Date of Status Change: 7/1/25'. Action buttons include 'Copy Invoice', 'Appeal Invoice', 'Printable View', and 'Export to Excel'. The main invoice details for 'Jay & Jay LLP - London' are visible, including the address '51 Roman Rd, London, Greater London SN14 5HL'. A 'Bill To' section shows 'New UVT Client 7.1 (TC\_UVT)' and 'test'. An 'Edit Tax Authority Invoice Fields' modal is open on the right, featuring a warning message: 'Updates to Tax Authority fields can only be submitted once. Please confirm details before clicking Submit Update.' Below this, a blue information note states: 'Saving the Tax Authority Invoice data fields will automatically be sent to the client pending the next sync. Fields that were previously populated cannot be edited.' The modal contains input fields for 'Tax Jurisdiction' (United Kingdom), 'Tax Locality', 'Tax Authority Ref ID' (UK 8777119-1022), 'Alternative Invoice ID' (UK 0002289188), and 'Tax Authority Invoice Date'. 'Submit Update' and 'Cancel' buttons are at the bottom right of the modal.



# Tax Authority eBilling Processes – FAQs

- **Is a TeamConnect 8 upgrade required?**
  - Yes, CSM 8 is supported on TeamConnect 8, so clients on earlier versions would need to upgrade.
- **How will I know if a Firm uploads a new attachment on a pending invoice?**
  - An email notification will be sent automatically. The recipients of the email can be configured in the setup rule.
- **Can I add specific workflow and validation rules based on our business requirements in each country we bill from?**
  - Yes, the new Tax Authority release provides fields and functionality seen in many different country-specific eBilling requirements.
  - After upgrading, configuration is needed for approval workflows, searches/reports, validations or other rules specific to your requirements
- **Is there a direct integration with government tax portals?**
  - No, pre-built integrations with a specific country's eBilling portal aren't part of the TeamConnect CSM 8 release.



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# Security Framework Updates

Peace of mind by design — TeamConnect's upgraded security and platform foundation ensure long-term compliance, stability, and protection against emerging risks.

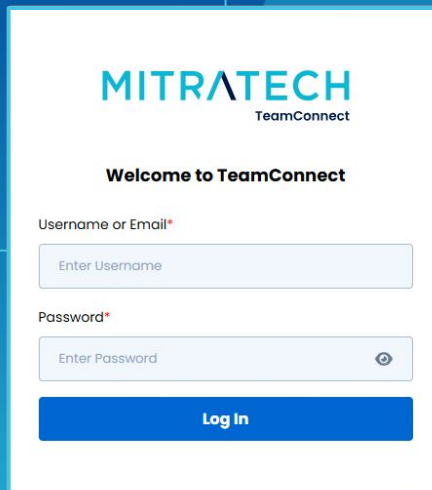
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# Security Framework Updates

## Spring Security Framework v6.0

Updated Spring Security Framework + other third party Libraries to the latest Long-Term Support versions to **fortify security & risk-prevention protocols**.



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TeamConnect

Welcome to TeamConnect

Username or Email\*

Enter Username

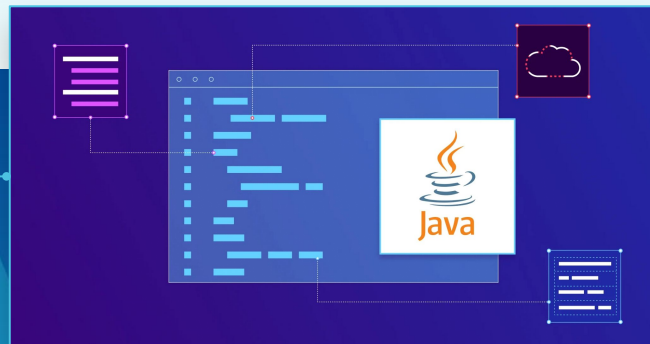
Password\*

Enter Password

Log In

[Need Help?](#) [Terms & Conditions](#) [Privacy Policy](#)

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## JDK 21 Long-Term Support

- **TeamConnect Enterprise 8.0 is now updated to JDK21** which is a Long Term Supported version and also covered by [Oracle's NFTC](#).
- The update to JDK 21 with Industry compliance standards

# Improved SAML SSO

SAML Authentication Settings

Enable SAML?

☒

Add New SAML Registration

\* Name

\* Registration ID

Entity ID

Single Logout URL

\* Certificate

Choose File

No file chosen

Add Registration

Description

\* Metadata URL

NameID Format

Single Logout Response URL

Private Key

Choose File

No file chosen

[illegible]

**Login**

[Log In with Okta](#)

Log In with azure

[Privacy Policy](#)

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## SAML SSO included in TeamConnect

- TeamConnect Enterprise 8.0 will now have SAML-SSO integrated into the platform.
- TeamConnect 8.0 SAML authentication now also supports multiple identity providers for login.

# Logging Improvements

**MITRATECH TeamConnect**

Home Financials Matters Contacts Calendar & Tasks Documents CSM Admin SOP TAP Reports Document Automation ARIES ARIES Admin InvoiceIQ UVT Issue Tracker

Expand All

Legal Hold Settings  
Budget Settings  
Admin Settings

**Logging - System**

Update ? Help

Authentication

ERROR
ERROR
DEBUG 10m
ERROR
ERROR
ERROR
ERROR
ERROR
ERROR
ERROR
ERROR
ERROR
ERROR
Global Search
Custom Search
Stores

History  
About  
Logging  
System

**Logging Timeout**

- The Logging Timeout feature allows administrators to temporarily increase logging detail for troubleshooting, then automatically reverts log levels back to normal after a set period—helping support teams capture diagnostics without manual cleanup or system restarts.
- This streamlines issue resolution and reduces the risk of verbose logging being left on in production environments

DEBUG Will change back to ERROR after 10 minutes

11:30:50,003 [maadhuri.kandrakota@mitratech.com] <audit.logLevel> Rule Logger Manually changed by maadhuri.kandrakota@mitratech.com from ERROR -> DEBUG  
11:30:50,003 [maadhuri.kandrakota@mitratech.com] <audit.logLevel> Integration Logger Manually changed by maadhuri.kandrakota@mitratech.com from ERROR -> DEBUG

# Resources

**[TeamConnect Version 8 Release Page  
on Client Success Center](#)**

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# Coming Soon

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# February 2026

## TeamConnect Business Intelligence (TCBI) for Linux



A modernization of TeamConnect Business Intelligence to a Linux-based Sisense platform, delivering faster, more secure, and fully compatible reporting along with many client-requested feature enhancements



## Advanced Docket Management

An AI-enhanced docketing capability that automatically extracts, interprets, and tracks critical deadlines from case documents—reducing manual entry and improving litigation accuracy



## Outlook 365 Document and Email Handling

Helps legal teams manage matter-related content directly within Outlook, minimizing the need to switch between systems. Includes file preview, multiple attachments, and multi-email uploads



## ARIES™ – Expanded Financials

The next phase of the ARIES™ ecosystem, extending its AI insights beyond invoices to encompass all TeamConnect financial data—budgets, cost centers, and spend analytics—to power contextual, data-driven recommendations and actions



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# TeamConnect Portal Sneak Peek

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# TeamConnect Portal

December 9th

**Improved visibility** of idea alignment with our roadmap.

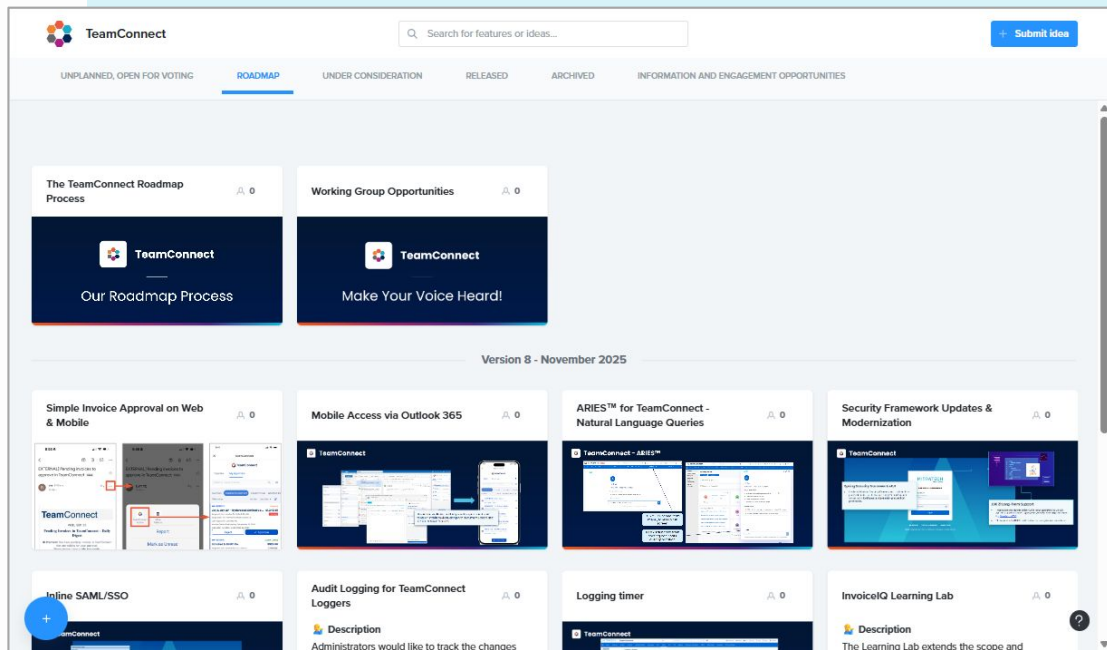
**Simpler submissions** and a clean, intuitive interface.

**Smarter feedback loops:** track idea merging and progress.

**Increased transparency:** view planned, in-progress, and released items.

**Simpler Access & Single Sign-On:** Use existing TeamConnect Community credentials.

**More Curated Experience:** Rather than standalone ideas, Productboard organizes related feedback into shared idea cards for comment, prioritization, and importance, clarifying collective needs.



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# Post Webinar Survey Q&A

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# Thank You!

For information on upgrading, reach out  
to your Strategic Account Manager

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