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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

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

Security-Focused
AI-Powered

8 New 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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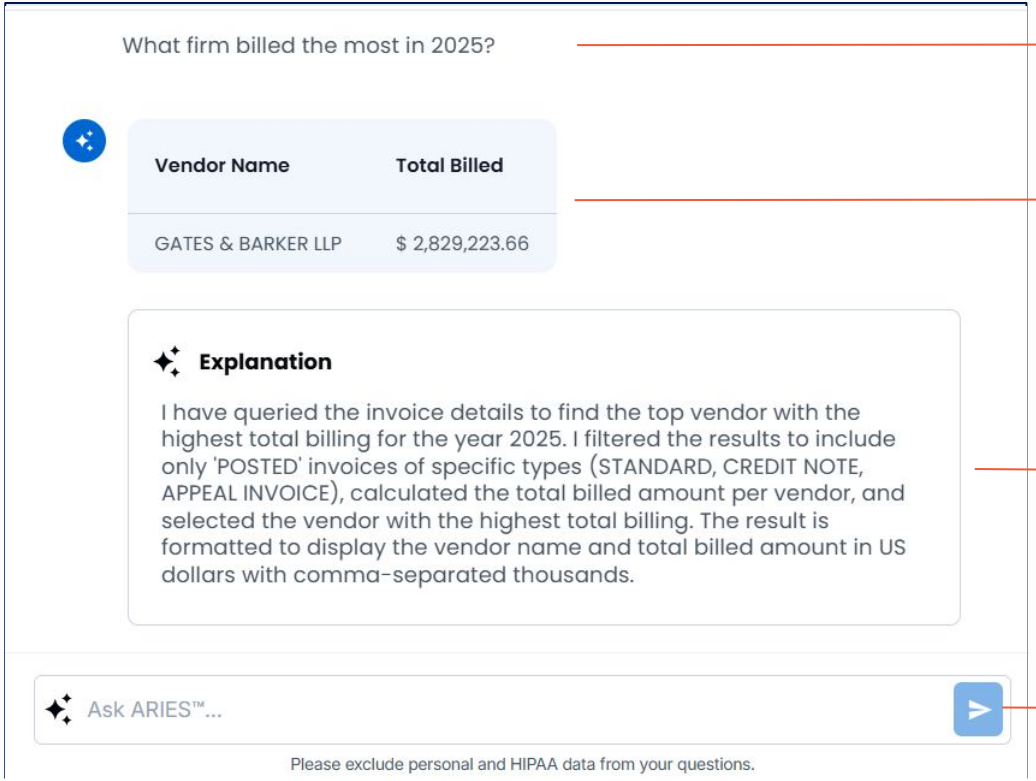
ARIES™ in Action



Ask questions in natural language

Receive answers as tabular data

Clear explanation of the query

Ask the next question

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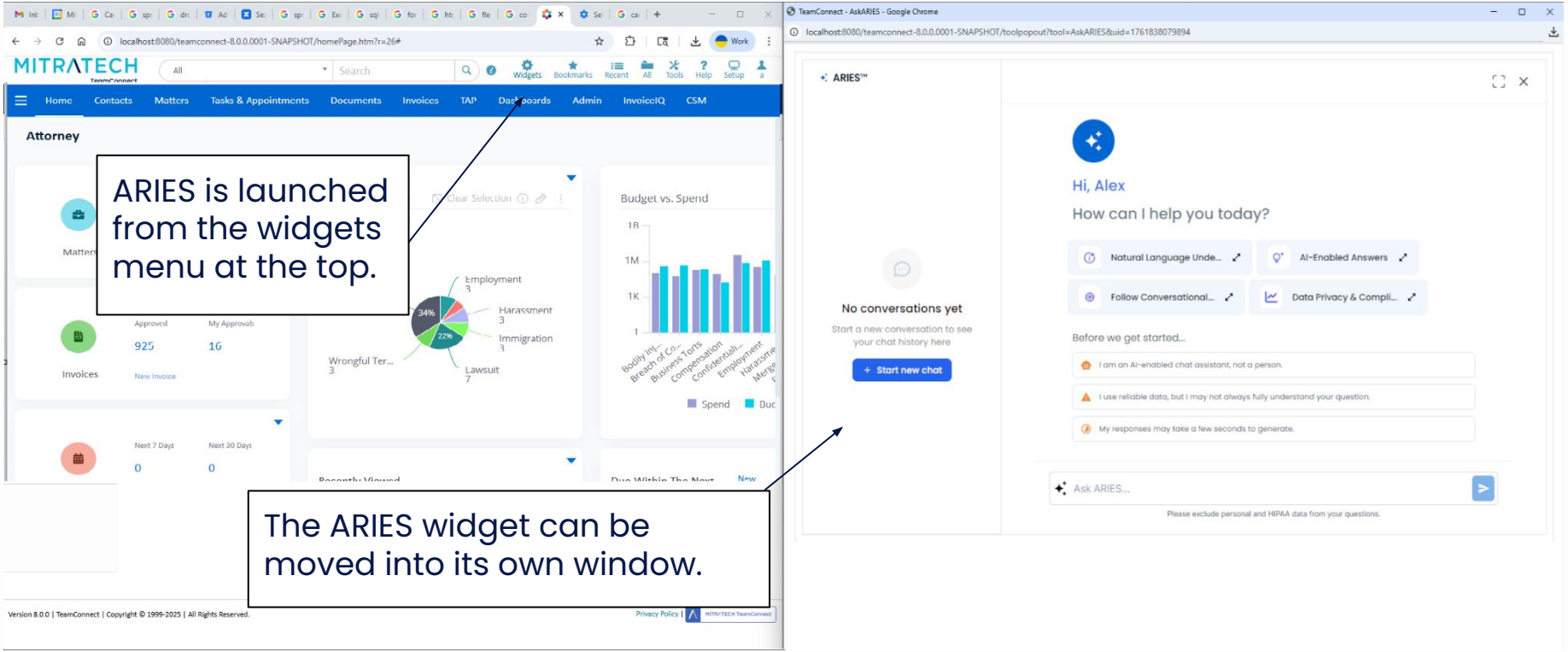
ARIES™ 2.0


ARIES is launched from the widgets menu at the top.
The ARIES widget can be moved into its own window.
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Home
Contacts
Matters
Tasks & Appointments
Documents
Invoices
TAP
Admin
InvoiceIQ
CSM
Attorney
Budget vs. Spend
Employment
Harassment
Immigration
Lawsuit
Wrongful Ter...
Invoices
Approved
My Approvals
925
16
New Invoice
Next 7 Days
Next 30 Days
0
0
Version 8.0.0 | TeamConnect | Copyright © 1999-2025 | All Rights Reserved.
Privacy Policy
TeamConnect - AskARIES - Google Chrome
ARIES™
Hi, Alex
How can I help you today?
Natural Language Unde...
AI-Enabled Answers
Follow Conversational...
Data Privacy & Compli...
No conversations yet
Start a new conversation to see your chat history here
+ Start new chat
Before we get started...
I am an AI-enabled chat assistant, not a person.
I use reliable data, but I may not always fully understand your question.
My responses may take a few seconds to generate.
Ask ARIES...
Please exclude personal and HIPAA data from your questions.

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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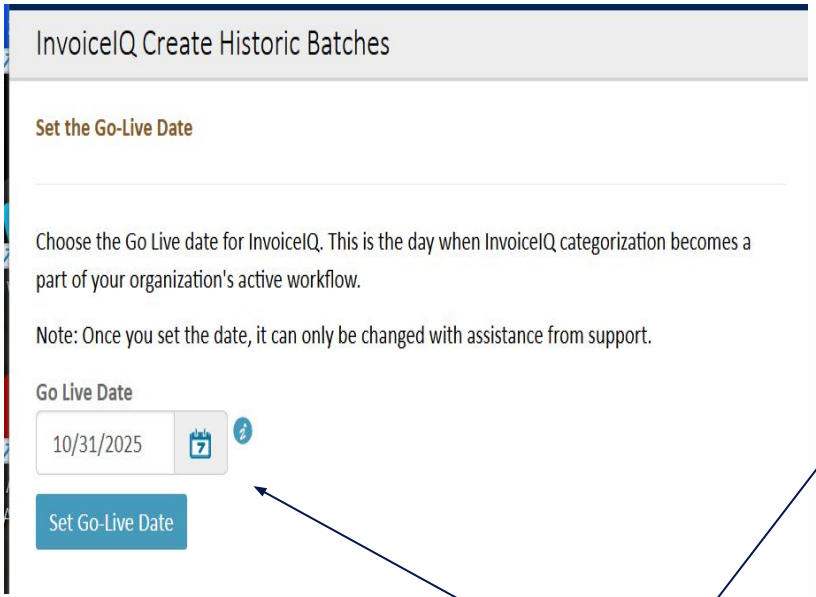
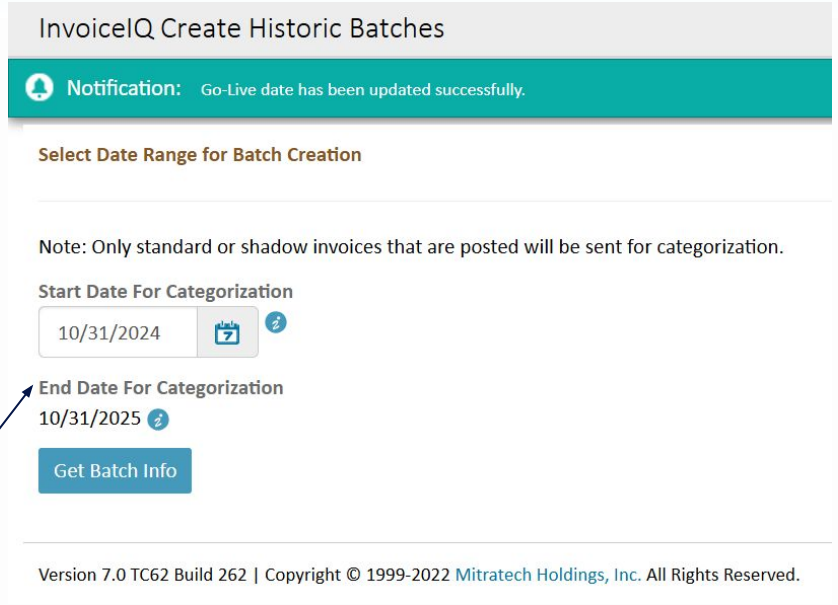
Historic Invoice Categorization





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

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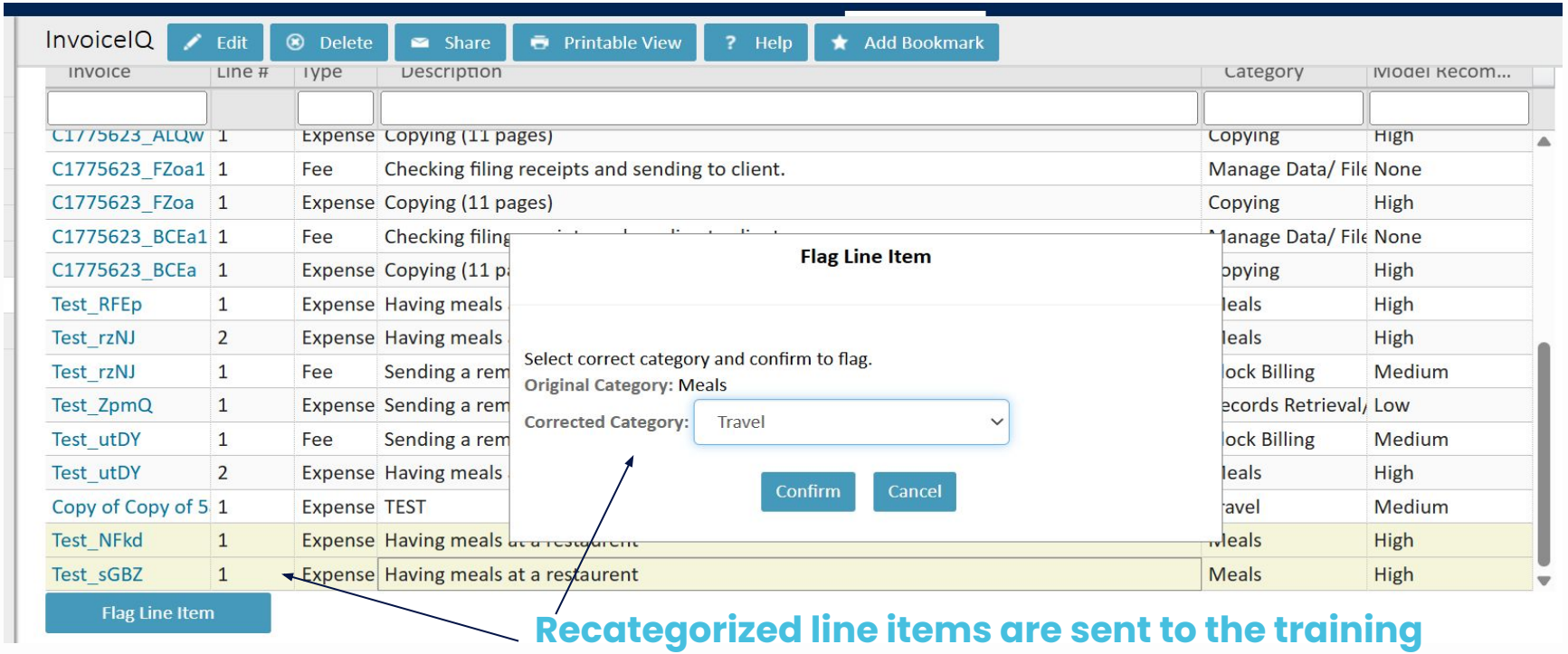
Line Item Flagging



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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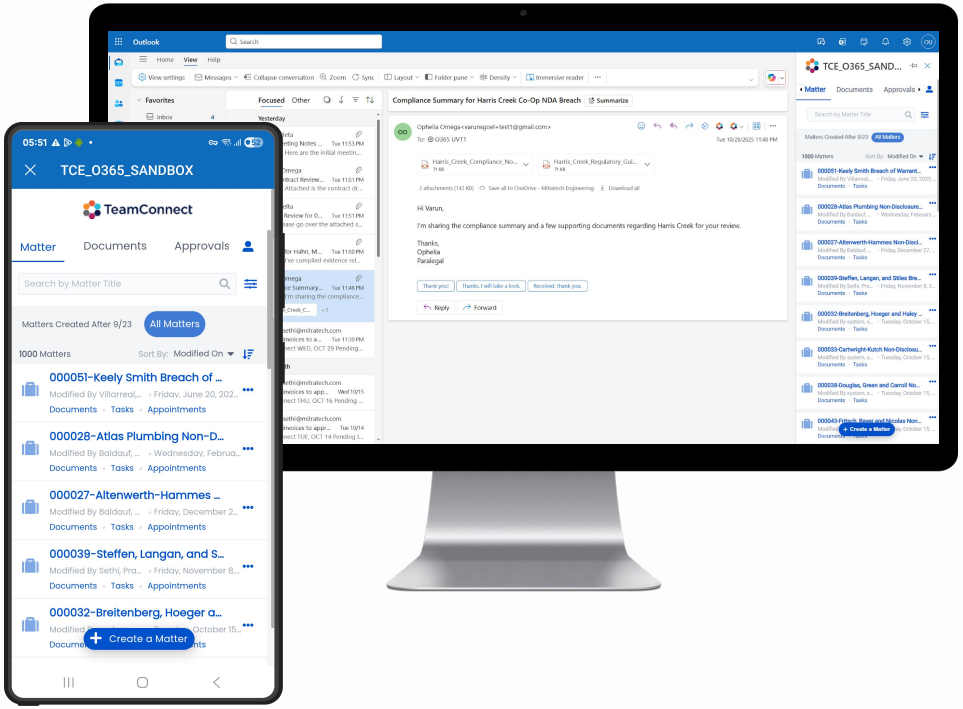
Outlook Add-in 5.0 on Web & Mobile

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



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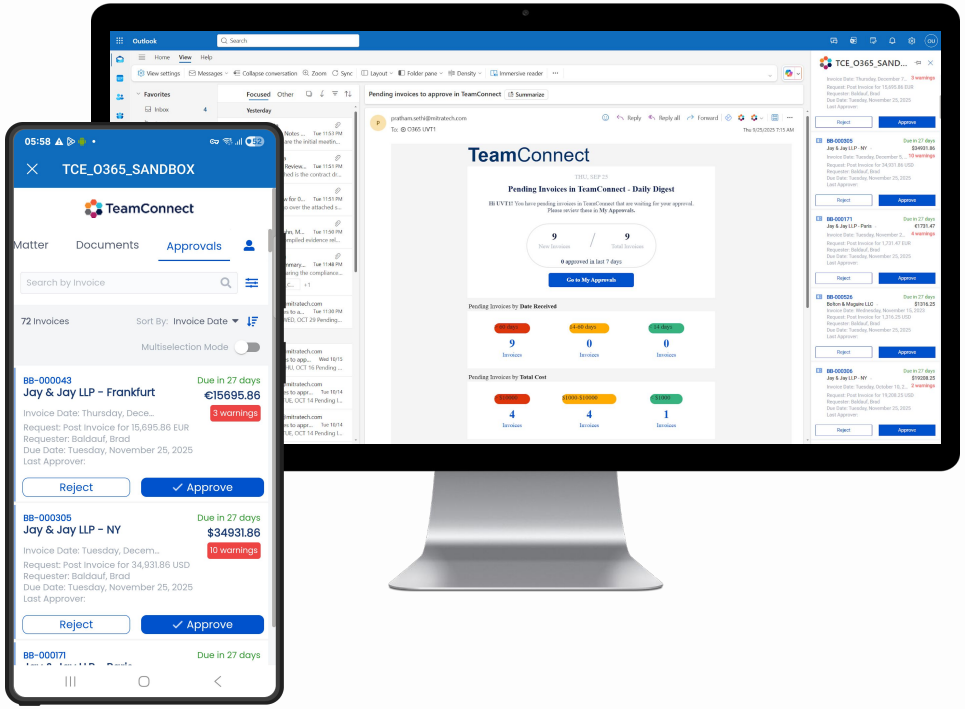
Outlook Add-in 5.0 on Web & Mobile

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.

Is there a separate deployment required for mobile access?

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

Which mobile operating systems are supported?

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

Can mobile access be disabled by the admin?

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

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

Yes, the invoice fields can be configured within TeamConnect.

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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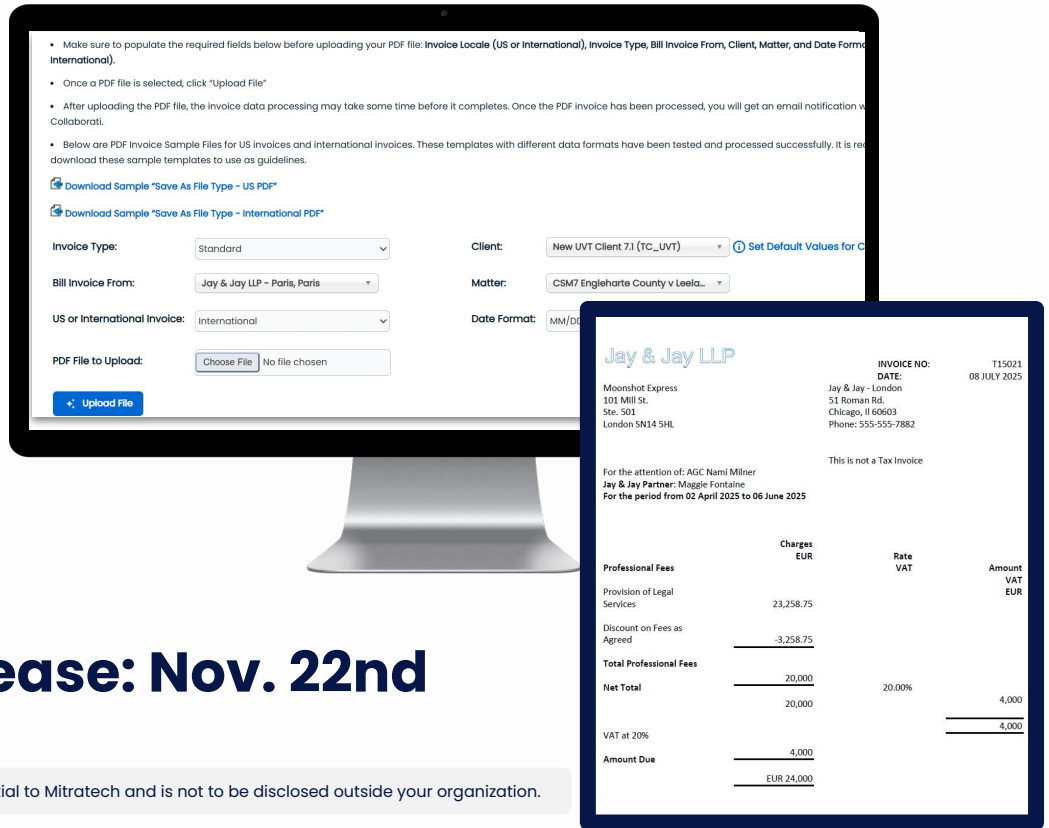
ARIES™ Non-LEDES Invoices – International

Firms can upload PDFs in any currency

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



Target Release: Nov. 22nd

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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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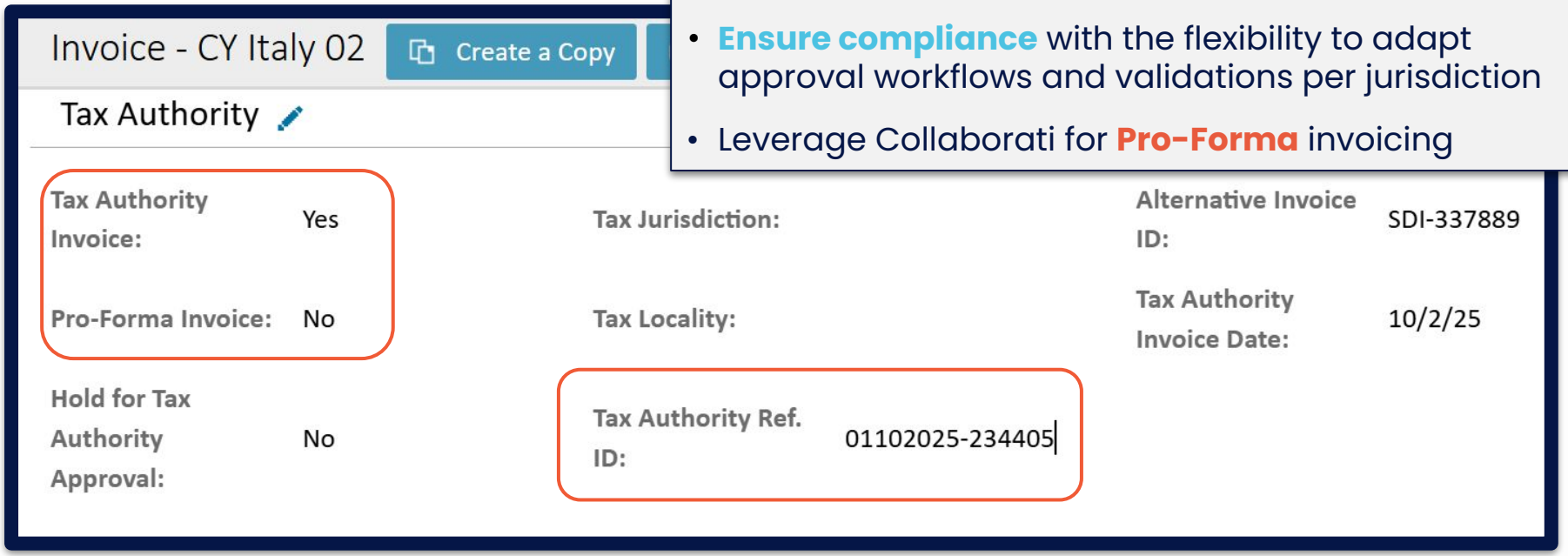
TeamConnect Invoice - Tax Authority Fields

- 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



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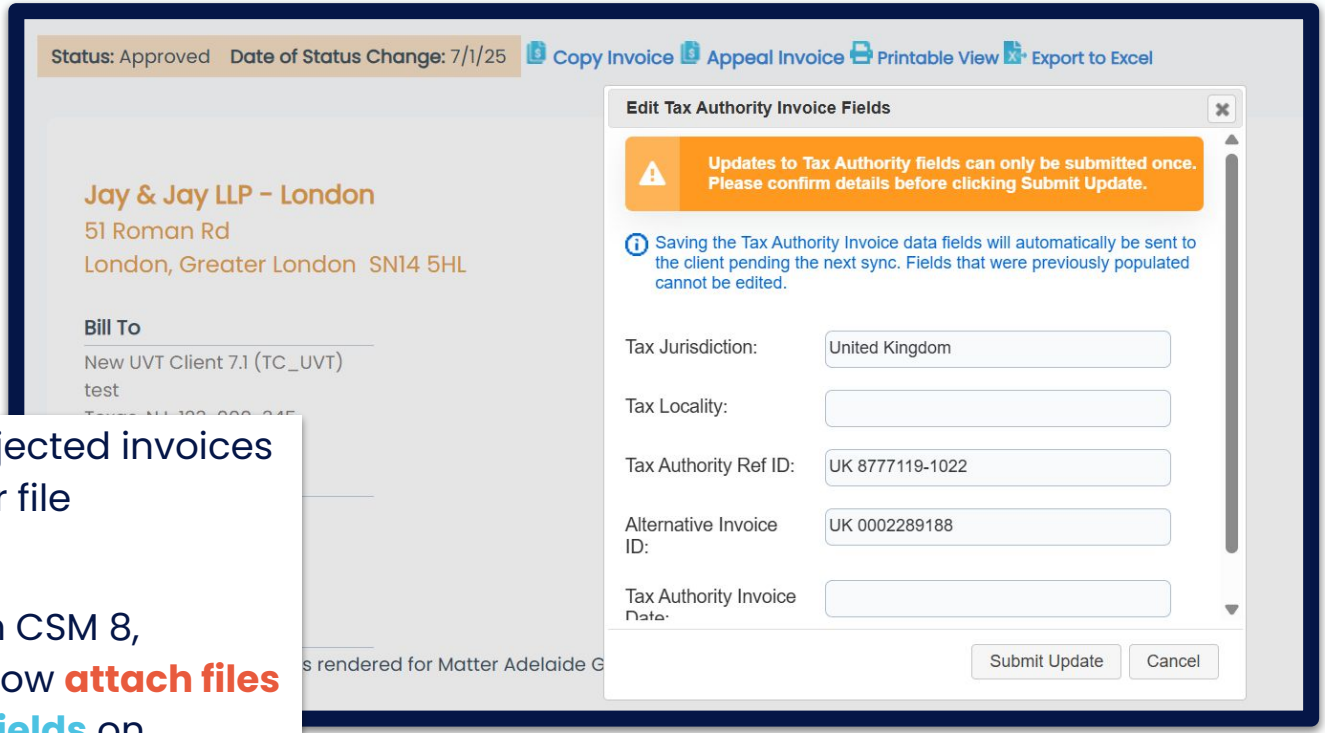
Collaborati Invoice – Tax Authority Fields



- **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

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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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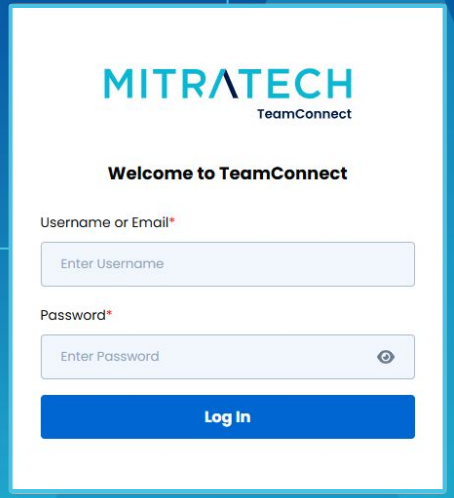
Security Framework Updates

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.**



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

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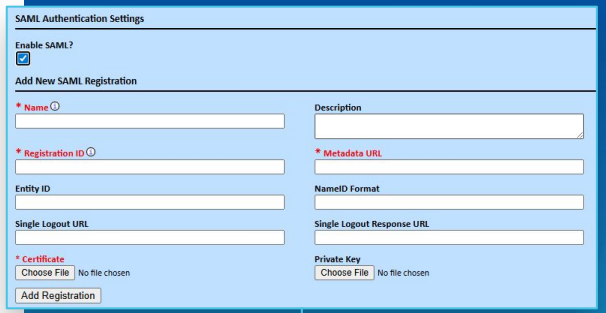
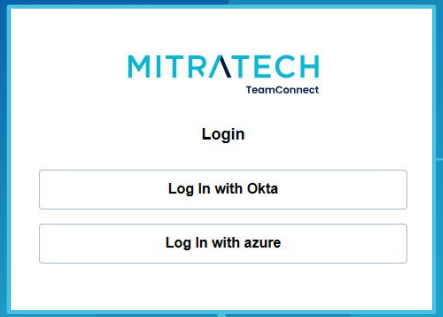
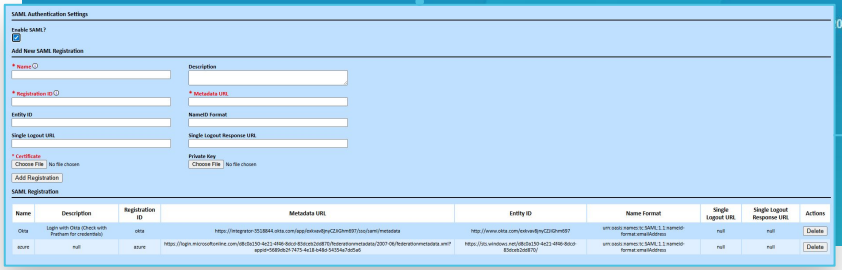
Improved SAML SSO





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.



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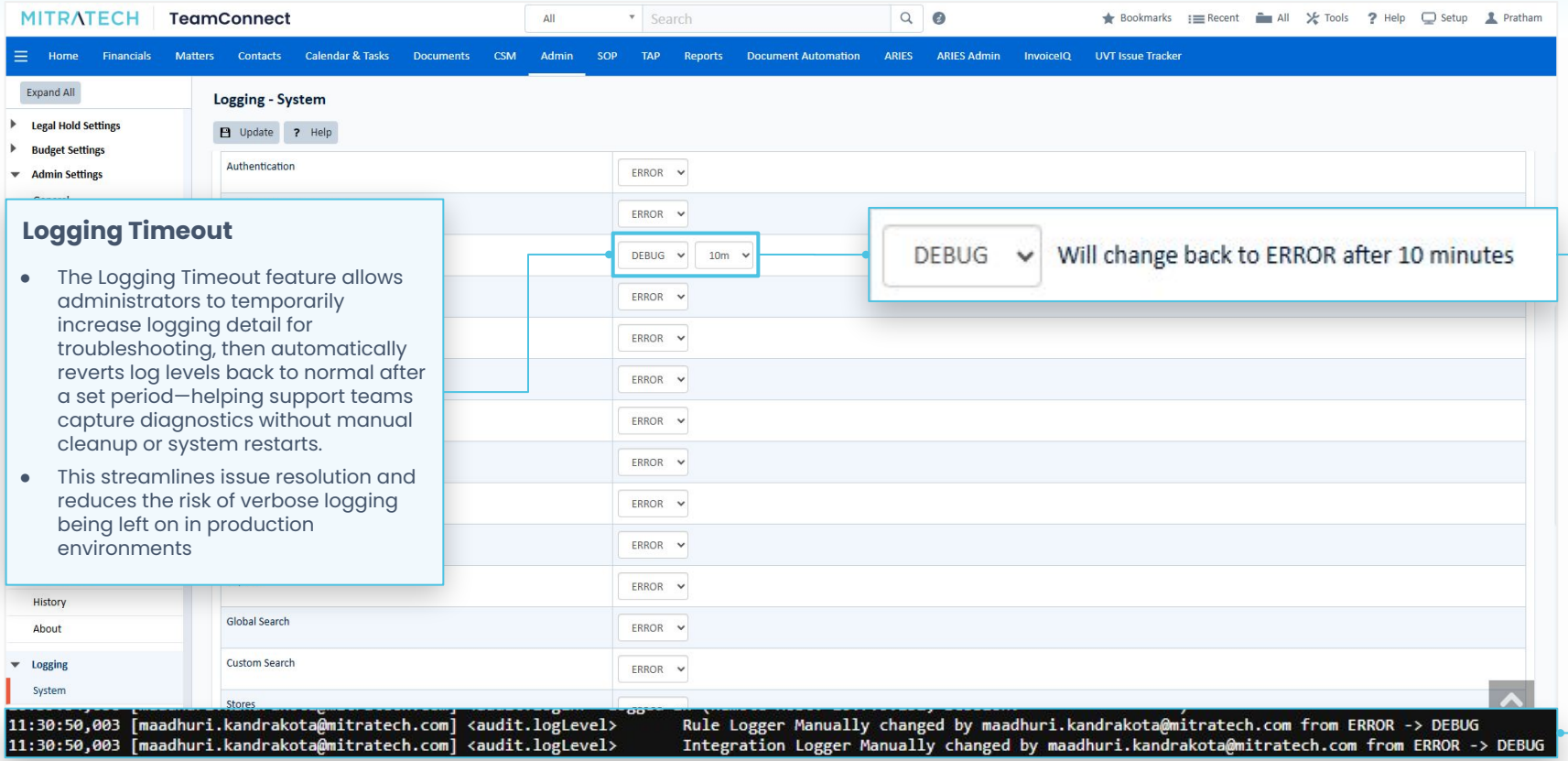
Logging Improvements



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

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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.

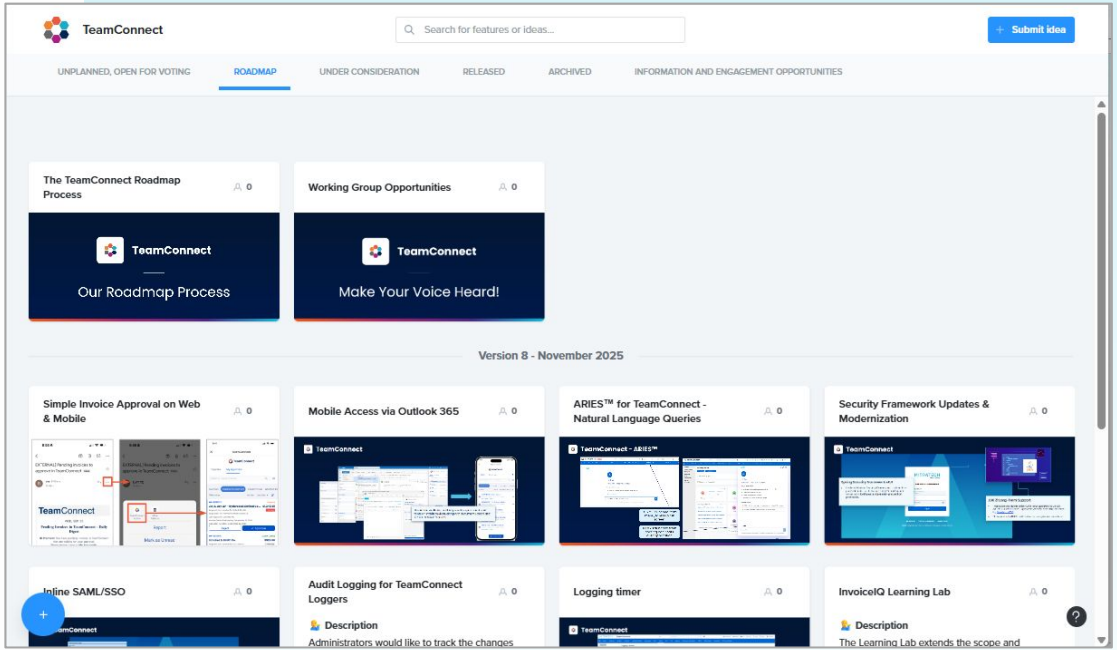
Simpler submissions and a clean, intuitive interface.

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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