

Integrations



Billing Integration | Orion

Required Modules

- Both the export of matters to PaperCut and the import of charges from PaperCut use the Orion Expense Recovery module, which must be licensed from Orion.

Data Export From Orion (To PaperCut)

- Client/ matter information can be automatically exported from Orion on a scheduled basis.

Data Import To Orion (From PaperCut)

- PaperCut will automatically export a CSV file to a Windows folder on a scheduled basis.
- The importing of data (cost recovery) into Orion occurs automatically on a scheduled basis.

Vendor Support

- The customer does need to schedule time with Orion vendor support, who will configure the Orion Expense Recovery module.

Scheduling

- It is recommended that the Orion integration is a dedicated session with the customer and Orion support.



Export Options -Client/Matter Information

- Exporting client/matter information from Orion is an automatic process.

Frequency

- The sync can be scheduled to run on the hour or daily.

Export Options -Transactional/Cost Information

- Papercut will automatically export a CSV file to a Windows folder on a scheduled basis.
- The importing of data (cost recovery) into Orion occurs automatically on a scheduled basis.

Frequency

- Daily, weekly, or monthly.

