











Legal Practice Management Software (Basic Features)

	Files Notes	With practice management software, everything about a case/client file should be found in one central location, i.e., in the database file. Because data is stored on the computer, users can save time completing work rather than wasting time looking for files.
	Calendaring/Appointments/Scheduling	Bi-directional Calendar (e.g., Microsoft Outlook) integration should be std. Both group and individual calendars should be standard features in practice management software. A lot of flexibility should be available to users who need to reset appointments, schedule a chain of events together or create recurring appointments. Some practice management vendors offer built-in calendaring rules for various jurisdictions to further speed up the calendaring and docketing process.
	Document Mgt Document Assembly Document Production	<ul style="list-style-type: none"> • Scan documents for paperless files and organize electronic documents for easy retrieval • Generate documents (pleadings, contracts, discovery responses, correspondence, notices, etc.) faster with more accuracy without retyping information already in the database. • Utilize document production tools, such as bates stamping, allowing easy integration with document production software, e.g., Summation.
	To-Do Lists/Tasks Rules-based Docketing/Deadlines	Bi-directional Task List (e.g., Microsoft Outlook) integration should be std. Practice management software should have proactive, interactive task or To-Do lists that make keeping deadlines easy. Most practice managers also make it easier to delegate and track the status of tasks. Various alarms and reminders can be set for these items. Automatic forwarding of To-Do lists allows you to take care of neglected items electronically.
	Contacts/Rolodex Relationship Mgt (CRM) Conflicts Checking	Bi-directional Contact Mgr (e.g., Microsoft Outlook) integration should be std. Office-wide contact management allow users to include all contact information for people, companies, and Courts, and integrate the contacts with other information found in the practice manager, i.e. linking contacts to files and appointments.
	Journal Phone Call Management Email Mgt	Users can track incoming and outgoing communications, such as phone calls, emails, faxes, etc.. A journal can also be used to record/track all major case activity, thus creating a case activity history.
	Mgt Reporting	All practice mgt systems will allow flexible and real-time reporting of case information, allowing users to easily create custom reports. Many systems will integrate with 3 rd party reporting software, such as Crystal Reports Writer.
	Time & Billing	Most practice mgt systems will have a time & billing module built in.
	Knowledge Mgt Research	Some Practice mgt systems allow Legal research to be integrated with the case files. More importantly, a knowledge mgt system will keep and organize legal authority for future cases. With each new matter, time will be spent on <i>improving the wheel</i> instead of reinventing it!.
	Additional Features & Modules	Advanced Customization , Web interface, mobile Access, Accounting
		Adapted from Law Office Computing article, 2005 Case Management: The most effective solutions for small, medium and large firms , by Natalie Thornwell