

PRACTICE MANAGEMENT FEATURES – CHECKLIST

- ❖ IS THE FEATURE LISTED A “MUST HAVE” FOR YOUR FIRM?
 - OUTLOOK EMAIL INTEGRATION
 - GMAIL EMAIL INTEGRATION
 - OUTLOOK CALENDAR SYNC
 - GOOGLE CALENDAR SYNC
 - OUTLOOK CONTACT SYNC
 - GOOGLE CONTACT SYNC
 - DOCUMENT ASSEMBLY
 - WORKFLOWS / CALENDAR PLANS FOR AUTO CREATION OF APPOINTMENTS AND TO-DOS
 - DOCUMENT MANAGEMENT
 - TIME ENTRY
 - MATTER CUSTOMIZATION BASED ON MATTER TYPE (TRACK DIFFERENT CASE DETAILS FOR DIFFERENT PRACTICE AREAS)
 - CONTACT CUSTOMIZATION BASED ON CONTACT TYPE (TRACK DIFFERENT CONTACT INFO BASED ON CONTACT CATEGORY)
 - MOBILITY
 - CLIENT PORTAL
 - DROPBOX INTEGRATION
 - VIEW MULTIPLE FIRM MEMBER CALENDARS
 - MESSAGING
 - REPORTING
 - CONFLICT CHECK
 - MOBILE TIME ENTRY
 - TIMERS
 - AUTO CLIENT / MATTER NUMBERING
 - SECURITY FOR INTERNAL WORK GROUPS (TO CONTROL ACCESS TO CERTAIN INFORMATION BY USER OR USER GROUP)
 - CLOUD BASED
 - TRADITIONAL ON PREMISE SOFTWARE
 - QUICKBOOKS INTEGRATION
 - HOTDOCS INTEGRATION