

Amicus Attorney® vs. Microsoft® Outlook

Outlook is a good general purpose personal organizer. However, it was not designed for lawyers, does not address the information needs and work flow required by lawyers, and as such does not provide the full functionality required by most attorneys to manage their practices.

In contrast, Amicus Attorney was designed by lawyers for lawyers, and meets their practice management needs better than any other product in the world today.

There are four main cornerstones to practice management: *People* (contacts), *Events* (calendar), *Files* (client/matters) and *Time* (billable time records).

Outlook has only two of these – people and events. Without the other two, it cannot provide a true practice management solution, no matter how much you customize it.

This does not just mean that Outlook is missing files and time features. It also means that the calendar and contacts capabilities of Outlook do not meet a lawyer's specific needs.

For example, you can put an appointment in the Outlook calendar, but you cannot relate it to a client file. You cannot view all the events on a specific file. You can have a task in your calendar, but you cannot link it to other tasks, or have it automatically reschedule according to legal rules. Nor can you have that task automatically draft a document for you, while doing a time entry in the background. Amicus Attorney can do all these things.

Here are just a few of the areas in which Amicus Attorney has significant advantages over Outlook in providing an integrated solution designed for lawyers:

Case/Matter Management

The Amicus Attorney Files module provides a host of tools for managing all the people, facts and

information on each client/matter file in your practice. On a firm-wide basis you can track all the communications, schedules, tasks, time, documents, notes and custom information for each file that you open for each client. Assign juniors to a case or review a chronology of an entire transaction. Generate reports to specific clients or on cross-sections of your practice so that you understand your business better. Manage each case from beginning to end, knowing that you are on top of it and that you have all the information at your fingertips.

Outlook has no concept of a “case”, “matter” or legal file and accordingly provides none of this. This key capability is a major distinction between a contact manager such as Outlook and a practice management package like Amicus Attorney.

Time Sheets

Amicus Attorney tracks a legal professional's billable time. It allows you to conveniently review today's time entries, those from previous days, and a monthly overview. Before posting to your accounting system you can edit them as often as you like, and see a running total. Post your time entries to accounting with a click of your mouse. Amicus Attorney automatically passes the information in the correct format for your accounting package. Amicus Attorney works with over 20 leading billing and accounting software packages that are commonly used by lawyers.

On top of this, Amicus Attorney provides statistical reports so that you can compare actual billable hours against your goals, or review cross-sections of how your time is spent.

Lawyers typically find they capture more billable time from their work when they use Amicus Attorney, because of the many features that these integrated time sheets provide.

Since Outlook has no concept of time, none of this is possible.



Telephone Call Management

Lawyers spend a great deal of time on the telephone each day. Amicus Attorney has comprehensive call management, including a Call Center for taking, sending, organizing and returning phone messages; tools for tracking notes on all calls placed and received; in-context logs of previous calls by anyone on your team while you are recording a current call; automatic reminders for follow-up calls; automatic time entries for calls; and the incredible add-on Telephone Pro that even screens your calls, presents a caller's file before you speak to them, tracks long distance calls and more.

Outlook has no facility whatsoever for managing phone calls.

Document Assembly

Law is one of the most document-intensive professions in the world. Document assembly saves significant time and effort in generating documents. Using the standard text in a template document, you add all the client/matter details from Amicus Attorney, generating sophisticated documents quickly and easily.

Amicus Attorney will do document assembly with Microsoft® Word, Corel WordPerfect®, HotDocs® or any text editor. Virtually all of the information in the Amicus Attorney database can be used in your documents – from matter information to time entries.

Amicus Attorney provides numerous sample documents that are included with the software. You may use these directly, edit them to suit your needs, or create your own. The library you build up can be personal or can be shared by your entire firm.

In contrast, Outlook has basic mail merge capability, but there is no legal context. You can only generate a document using simple contact information such as names and addresses. You cannot use any file, to-do, or time entry information. Also, Outlook does not provide any legal specific templates for you to work with. Of course Outlook only works with Word.

Document Management

The large number of documents that lawyers produce causes a problem – it is often difficult to find them again when you need them. Paper documents can be clipped into a file, but their electronic versions are often lost.

Amicus Attorney solves this problem by allowing you to attach your documents to its files. Any type of document, including word processing, spreadsheets, litigation support or scanned files may be attached to the client/matter file to which it relates in Amicus Attorney. Once you are looking at a file in Amicus Attorney, you can quickly view all of the documents attached to the file, no matter who created them, and by clicking on that document, open it for review or editing. Or you can find a document just by searching the document summaries in Amicus Attorney.

Outlook does not offer document management, since it does not support the concept of client files. The “Journal” provides you with access to documents you previously opened – provided they are Microsoft documents or generated by programs that are part of the Microsoft Office Compatible program. However, there is no tie between the document and file as there is with Amicus Attorney.

Conflict of Interest

Amicus Attorney has built in conflict of interest checking. With a single search you can determine whether a given person or company has been recorded by anyone on your team, and if so on what file and what their role on that file was. You can then make an informed judgement about a possible conflict of interest.

Outlook has no such concept. You could do a search to find someone in your own contact database, but you would have no context or structure to make a conflict of interest judgement.

Timer

A key benefit of Amicus Attorney is that it integrates time directly into your activities. With Amicus Attorney the time someone spends on a task is not only tracked, but is also related to the proper file for billing. With tasks such as making a phone call, a timer is automatically invoked to ensure that your time is tracked. You can start a timer at any time, and then associate a file with it

for a time entry. The timer can be present in any application that you are using.

Outlook cannot track time on activities, and therefore cannot help the lawyer in ensuring that billable hours are accurately recorded and associated with the correct file.

Intelligent Assistance with the DO Button

Both Amicus Attorney and Outlook can provide reminders about to-dos, tasks, or appointments. However, Amicus Attorney goes far beyond this capability through the unique DO button, which adds *intelligent assistance*.

The DO button is found beside certain activities in your To Do list. When you click on the DO button, it will actually perform that task for you. For example, if there is a reminder in your calendar to draft a retainer, clicking the DO button will draft the document for you, *and* automatically do a time entry for the work! Thus the Amicus Attorney calendar doesn't just remind you of what you have to do, it helps you do it and it helps you charge for doing the work.

The DO button can perform numerous tasks for you. It can draft documents, place phone calls, check files, send email, or go to web sites. It can also run any other program on your computer, passing it whatever command line you specify. Which means it can do practically anything your computer can do.

Outlook does not have anything approaching this functionality.

Court Docketing and Precedents

Amicus Attorney has sophisticated systems for helping lawyers with statutory dates, court rules, or multi-stage transaction scheduling of any kind. Outlook has no capabilities in this area.

For automated court docketing, Amicus Attorney has a strategic relationship with CompuLaw[®], the nation's leader in up-to-date state and federal rule sets. When you select a rule set and a key date in CompuLaw, all of the steps and deadlines are automatically generated and entered in your Amicus Attorney calendar and on your client's file.

Amicus Attorney also allows you to set up your own precedents for any type of legal transaction –

from court rules to real estate closings. Any series of steps can be linked together according to the legal rules. Your precedent includes all of the appointments and to-dos associated with the activity, along with any intelligent assistance (DO buttons) that you have added. Then anyone in your firm can re-use this precedent every time they need to perform that kind of transaction, and all the steps will be scheduled for them.

Secondary Office

The ability to access practice information while away from the office, whether working at home, on the road or in another office location, is of crucial importance to lawyers. Amicus Attorney provides a unique solution that allows you to work with all of your office information from your home computer (or some other remote location), and then copy any changes back to your PC at the office.

Outlook has a similar capability, but its utility is greatly reduced by the fact that you cannot access file and time information.

Date Calculator

Lawyers often need to be able to readily determine deadline dates or the number of days between dates in order to properly schedule their activities.

Amicus Attorney provides you with a useful date calculator. You can find the date, which is a particular number of business days/calendar days/weeks/years before or after a selected date. You can also readily determine the number of business/calendar/weeks/months/years between two dates.

Outlook does not provide a date calculator.

Links With Other Legal Tools

Amicus Attorney is the hub of your practice. It shares information with more tools that lawyers rely on than any other software. Amicus Attorney links with billing and accounting, document automation, word processors, and court docketing software packages. It can share information with personal organizers. Interact with your telephone switch. Send email and access the internet directly from Amicus Attorney.

Outlook can do only a fraction of this.

Pro-active Practice Management

Think of Amicus Attorney as a pro-active assistant, anticipating your needs and providing assistance, often before you even ask for it. The combination of this pro-active approach with the integrated practice database results in many additional benefits.

For example, when first launched, Amicus Attorney does a check of your entire practice database and presents you with a Daily Report, summarizing things that need to be brought to your attention. Typical warnings would be telling you about an appointment yesterday for which you did not do a time entry, a client you have not been in touch with recently, or a file on which you are in danger of going over a quote you have given to a client.

Outlook does not have comparable capability.

The Cost of Customization

Amicus Attorney has been designed to work the way a lawyer does, right out of the box. The interface is designed so that lawyers are instantly comfortable with it.

Outlook is a general system that must be heavily customized to become more useful to legal professionals. Even with an investment in expensive customization, Outlook's capabilities do not begin to approach those of Amicus Attorney.

Customizing Outlook is not simple. The cost of this customization is often far more than the purchase price of Amicus Attorney, and is an ongoing expense as you continue to make changes to Outlook, or need to modify it when new product releases affect earlier modifications.

Of course, you can customize Amicus Attorney in many ways as well. It is highly flexible, so it can be set up to meet the needs of your particular practice.

Amicus Attorney Works with Outlook

Besides all the above, Amicus Attorney lets you have the best of both worlds.

Amicus Attorney can share information with Outlook. This allows you to take advantage of both the sophisticated practice management tools that

Amicus Attorney offers, and the Outlook tools you most frequently use.

For example, you can send email from any business card in Amicus Attorney and it brings up Outlook, with the address already filled in.

Or if you want to start in Outlook, all your Amicus Attorney contacts are available to you there. Amicus Attorney takes advantage of MAPI ("Messaging Application Programming Interface") to exchange information with Outlook. You can easily access your Amicus Attorney contacts in Outlook – Amicus Attorney shows up there as one of the Address Books.

Of course, you can exchange other information with Outlook on an import/export basis if you want to. You can even set up an import template in Amicus Attorney that will intelligently merge information coming in from Outlook. So changes or additions are brought in, but existing information is not touched.

Summary

Amicus Attorney is designed in every respect for lawyers. Every little detail about how it works and what you can do with it is designed with the legal professional in mind.

Not just *what* it does – but *how* it does it, with the natural workflow of legal tasks taken into account wherever possible.

This provides tremendous benefits over general systems such as Outlook. At the same time, Amicus Attorney works with Outlook so you can benefit from the features of both products.

Amicus Attorney is the clear choice for the legal professional.