



Practice Management Feature Checklist

It is important to determine whether the feature listed is 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 ToDos
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