# How Practice Management Software is Different from Outlook

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> *Why use Practice Management Software?*
>
> **Unlike Outlook, which is designed for any business to use, all features in practice management software are specialized for law firms.**

The best way to think about the difference between Outlook and practice management software is the old expression, "Jack of all trades, and master of none." Microsoft designs Outlook to be general enough that absolutely anyone can use it. Most likely your doctor, your child's principal and the owner of your favorite restaurant all use Outlook. It is the jack of all trades. Conversely, legal practice management software focuses on one trade – attorneys. You will find every feature of the software designed for law firms. The difference can save you time, make it easier to organize your practice and help you capture more of your billable time. Here are some differences between the two.

## Business Card v. Client File

Contacts in Outlook are designed to keep track of personal information – the information on a business card. In contrast, practice management software is designed to track entire client files, including contact information. That means, out of the box, Outlook is ready to track information like "Nicknames," "Birthdays" and "Spouses," while practice management software has case and client files that are ready to organize information like jurisdiction, area of practice, documents related to a case, meeting notes, research and e-mail (see the chart below for other examples).

## Conflict of Interest Search

Outlook can search your computer for e-mails, appointments and contact information for signs of a conflict. Practice management software can search the records of everyone in your firm for e-mails, appointments, contacts, meeting notes, notes on fee and cost entries, research and other client file information. Your conflict search includes the entire office, no matter who is out of the office that day, and the search only takes a few seconds.

## Tracking Time

Because practice management products were designed for law firms, most are designed to work with billing software. That means you can easily turn your appointments, e-mails, research and time spent writing documents into billing entries. Tracking your time becomes much more efficient when you can turn any appointment on your calendar into a billing entry.

## Document Assembly

Outlook and Word integrate through "mail merge" functionality. This lets you insert fields from a contact into a standard letter, but your options are limited to the personal information tracked in Outlook (e.g. name, address, etc.). In practice management software you can do the same thing, and much more with document assembly functionality. You can insert into a document any information from a case file (e.g. insurance carrier, opposing counsel, etc.). The document assembly process can also automatically create a billing entry for the time you spend on the document. It can automatically schedule a follow up task for you x number of days after you create the document, for example, to follow up with opposing counsel regarding the letter you are sending them. You can even have the document assembly process prompt you to fill in a few blanks for information that you may not have in the practice management software case file – for example the date that a document was signed.

## Sharing Information

Practice management software makes it easier to work with a team of people in your law firm. You can view appointments for your team members to see when someone is free for a meeting. When you pull up a client file, you can see all of the information for a case - that means every e-mail that anyone has sent or received, as well as all documents, research and notes that anyone has for a matter. This helps you save time that you would otherwise spend keeping track of the work other people in the office have or have not done.

## How Practice Management Software is Different from Outlook...Cont.

### Chain of Events and Court Rules

Outlook lets you create recurring events. For example, you can schedule a regular staff meeting each Tuesday at 9am. Practice management software can do that, but it also can automatically create a series of appointments and tasks that you can reuse – Calendar Plans. This can be helpful if, for example, there are a series of things you need to do each time you open a new case file. It can also be helpful to track court rules or the tasks that you need to complete prior to a trial. The items in your calendar plan can be automatically created and scheduled based on a reference date, for example the date of the trial. Once created, each task will appear on your calendar or task list based on the time frame calculated from the trial date.

### Cost to Customize

You can get around some of Outlook's limitations through customization (which can be expensive). For a law firm, Outlook cannot approach the level of usefulness that practice management software can offer. Do not try to stuff your case file into a Rolodex. If you want software that helps you manage your practice, you should be using practice management software designed for lawyers.

***What Outlook and PracticeMaster offer without customization:***

| | Outlook | PracticeMaster |
|---|---|---|
| **Fields:** | | |
| Nickname | ✓ | ✓ |
| Spouse's Name | ✓ | ✓ |
| Birthday | ✓ | ✓ |
| Name | ✓ | ✓ |
| Address | ✓ | ✓ |
| Phone | ✓ | ✓ |
| E-mail | ✓ | ✓ |
| Area of Practice | – | ✓ |
| Time Keeper | – | ✓ |
| Tax ID | – | ✓ |
| Client Number | – | ✓ |
| Date of Fee Agreement | – | ✓ |
| Verdict / Outcome | – | ✓ |
| Statute of Limitations | – | ✓ |
| Opposing Attorney | – | ✓ |
| County of Filing | – | ✓ |
| Jurisdiction | – | ✓ |
| Judge | – | ✓ |
| **Track Fees** | – | ✓ |
| **Track Costs** | – | ✓ |
| **Track multiple matters for a client** | – | ✓ |
| **Automatically associate E-mails with a matter** | – | ✓ |
| **View a Calendar for everyone in your firm** | Exchange Required | ✓ |
| **Share contacts across your firm** | Exchange Required | ✓ |
| **Share matter information (notes, E-mails, etc.) across your firm** | Exchange Required | ✓ |
| **Intra-office instant messaging that can link to client and calendar records** | – | Client Server Version |

***About Software Technology, Inc.***

Software Technology, Inc., the maker of **Tabs3 Billing Software** and **PracticeMaster Practice Management Software**, has been at the forefront of developing software for law firms for thirty years.

Tabs3 is one of the most widely used time and billing products in the United States and has been an industry leader since its introduction in 1979.

Tabs3 is designed to integrate with PracticeMaster, the emerging leader in practice management software. Among its many features, PracticeMaster provides an easy way for firms to create a firm-wide calendar, search for conflicts of interest, and organize case and contact information.

There are over 425,000 active user licenses of Tabs3 and PracticeMaster software combined.

For more information call **(402) 419-2200**, e-mail **sales@tabs3.com**, or visit **www.Tabs3.com**.