

**Stay focused. Increase profit. Reduce risk. Be connected.**



### **Dashboard view**

*Keeps you focused on your big picture and what needs to be done right now*

- Single view showing your matters, appointments, meetings and tasks
- Special display for slipped deadlines and recent messages received
- Click to the details of a contacts, matters, meetings or tasks



### **Privacy and security**

*Your, and your clients' data, is protected by the name you trust -- LexisNexis*

- Unparalleled security and privacy and your data is always available from SAS 70 Type II attested data centers
- Web-based solution with 99.9% uptime guarantee (excluding planned outages)
- Secure, world-class infrastructure, trusted by many of the largest firms, and verified by third-party security auditors



### **Contacts**

*Quick access to who you need to contact, when and where*

- Know whom you need to contact and where to contact them
- Locate, update or enter potential clients, witnesses, opposing counsel
- Add notes to the contact; send and receive memos directly from the entry



### **Conflict-of-Interest search**

*Use this comprehensive search to avoid financial and personal risks*

- Search – and find – any record or reference, even within documents
- Stores your search results for future reference
- Minimizes and protects you from potential embarrassment caused by potential conflicts



### **Daily digest**

*The confidence that you have all the details needed for you to focus on your priorities*

- Gives you the highlights of the coming day's tasks, meetings and appointments
- Alerts you to the status of work you've assigned to associates and staff
- Provides reminders of high, and low, priority activities



### **Mobility**

*A seamless link to all the critical details of your practice anytime, anywhere*

- Optimized view specifically designed for the smaller screens of smartphones and mobile devices
- Access, add and edit appointments, tasks, contacts, time and expense and matters with quick access to documents and files
- Connects your calendar, contacts and tasks from Outlook 2007 or 2010



### **Matters**

*At-a-glance access to your matters, cases or projects in one place with the relevant details accessible with a click*

- Organizes all emails, court dates, tasks, meetings, key documents, time and expense, and client details of any case
- Automatically assigns matter IDs based on settings customized for your practice
- Upload files and documents, including emails, and have access them to them anywhere from your laptop or mobile device



### **Client intake forms**

*Helps you understand how you acquire new clients...*

- Record relevant client details – how they came to you, their needs and how you can best meet those needs
- Customize the form to fit your practice or use the built-in template
- Organize details on new and prospective clients



### **Calendaring**

*Know what you need to do, when it needs to be done and where you need to be*

- View your appointments, meetings, tasks and deadlines
- Delegate and track tasks; you and your staff can update schedules as needed
- Easily synchronized with Outlook on your smartphone or mobile device



### **Time and expense tracking**

*Keep an accurate record of one of your most precious resources – time*

- Tracks expenses and time for you, and your staff, and assigns them to the appropriate client
- A timekeeper on the home screen ensures you capture all time, including emails and phone calls
- Easily exported to QuickBooks or Excel or other accounting software.



### **Document management**

- Upload, and access, files and documents directly to your smartphone, mobile device or laptop; no need for a third-party app
- Document storage is unlimited and at no additional cost
- All files are scanned for viruses



### **On-demand help**

*Unequalled simplicity and support*

- One-click set-up assistant helps you easily customize your practice preferences
- No upfront costs or consultants required to move your existing data
- Context-specific help on each screen – access help files or built-in tutorials