

The original All-in-One®
Software Suite for
Case and Financial Management

Front Office Product Sheet 



AIM® - Attorney's Information Manager

Product Features

- All case related materials are stored in a digital matter file organized by tabs for easy retrieval of information
- Documents may be organized utilizing shared document folders for quick access and user collaboration
- Matters can be opened in two ways, with full detail or by a summarized intake screen for instant matter creation
- One contact record is generated with multiple defined relations to reduce duplicate entries and ease conflict checking
- Personal contact lists are stored in a 'selected names' list for the user
- Complete reporting of docket events by attorney, date ranges, matter, and more
- Security is assigned by either individual operator or by defining user groups providing complete control of application access at various levels
- Activity codes can be used to standardize text for event entry
- Users can define personal view preferences for calendars/diaries to show event types and date ranges, icon and list displays, double-click behavior, work lists and much more

Successful firms understand that to remain competitive, their case management system must be capable of managing significant caseloads all the while operating in a real-time environment. The need to quickly and accurately gather, store, and retrieve information is critical to meeting increased client demands and ensuring firm success. To meet this demand, PerfectLaw® delivers the most powerful, reliable, and comprehensive case management suite for the legal market.

PerfectLaw's Attorney's Information Manager (AIM®), is the user interface that seamlessly consolidates all front office elements in one location. With AIM®, users have instant access to all case related information through a single application. The core of AIM® is its database driven matter file. The matter file contains all information related to a particular case, including docket, contacts, documents, and any other case-related data for each file, organized in a series of tabs for easy reference. With AIM® common workflow steps can be automated making teams more productive and firms focused on higher value work.

Benefits

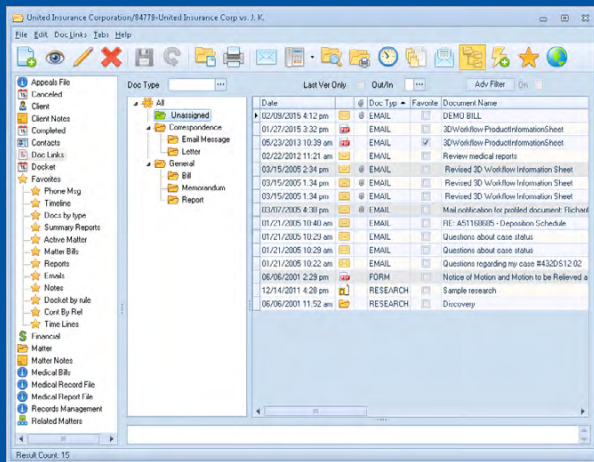
- Easy-to-use, intuitive interface with a familiar left-menu navigation look and feel
- Access real-time case information, from one location, throughout the firm
- Capture billable time throughout the workflow process
- Retrieve financial information at both a client and matter level with the All-in-One® system
- Eliminate the wasted time searching for matter information from multiple locations and applications
- Access case information, daily activities, progress reports, schedules, work lists, and more

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

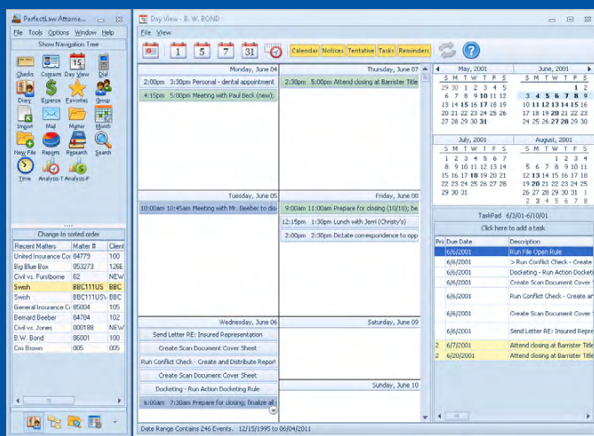
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More Product Features

- Audit logs are maintained for record changes and are available with a right mouse click
- Keep track of all pending matter-related events within the Appointment tab for the matter
- AIM® maintains a list of up to 99 recently worked on matters so that you can perform several tasks by either dragging and dropping or with a right mouse click without the need to open the matter
- Completing an appointment automatically generates a time entry with the client, matter, time, activity code, and description
- Client and matter notes can be stored as either free form memo or as a grid style detail per entry
- Schedule events easily with personal calendars, group schedulers, reminders, alarms, and scheduling rules
- View multiple attorney calendars at once to schedule and re-schedule appointments by simply clicking and dragging to select a time interval
- Drag and drop emails from Microsoft® Outlook® to a matter window or case listed on recent matters list



PerfectLaw® AIM® provides easy access to personalized worklists directly from the navigational window.



PerfectLaw® AIM® allows users to easily view multiple attorney calendars in a single screen in a single day, weekly, or monthly view.

Functions

- All case/matter-related information is organized in one central location
- Advanced Email and Phone Handler manages case-related communications
- Daily, weekly, and monthly personal and group calendars
- Monthly real-time calendar showing events, workload and billed hours with their value, and receipts
- Docket events in multiple ways from several locations
- Flexible rules-based docketing with deadline calculator
- Reminders and alarms for event notification
- Simple scheduling of recurring events
- Firm-wide contact/relationship management with ability to save personal contact lists
- Task management
- Accessible list of recently worked matters
- Reference personalized lists of dates, documents, matters and contacts
- Appointments can be scheduled with an invitation list to other staff members
- Define both global and personal settings
- Customize summary tabs and screens
- Complete audit log of document and contact changes
- Automatically capture time with various workflow steps
- Extensive administrator security control at operator or group level for application, event, and record modification privileges

Synergy

- With the Data Browser Advanced Search Engine, users can effortlessly search for information throughout PerfectLaw®, store personalized search filters for dates and documents, create work lists that are immediately available with minimal mouse and keystrokes, and more
- With AIM®, all Front Office elements (data browser search engine, document management, document assembly and any practice area packages) are incorporated in one program interface
- With PerfectLaw® Document Assembly, users can easily merge forms with case information stored within PerfectLaw® and link merge forms to calendar events to produce documents
- With the PerfectLaw® Document Management System (DMS), imported documents can be easily managed from within the DocLinks tab
- With a PerfectLaw® All-in-One® system, Front Office users can automatically capture time spent on various tasks for client billing, access financial information for a matter with both client-level and matter-level information, record billable expenses, make check requests that are processed by back office users (saving time and costs expended with traditional paper transmittals), and much more

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