

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

Front Office Product Sheet



Contact Management (CRM)

Product Features

- Contact records can be linked to phone notes and emails
- Full address book integration with Outlook®; edits made to “your selected contacts” are synced wirelessly to Outlook® or your mobile device
- Relationship definitions are based on each matter’s specific practice area so users don’t get confused and choose the wrong relationship; for example: ‘Patent Examiner’ is only available in the lookup table of patent matters
- Administrative support and controls for granting read, write, and update permissions with audit trails
- Phone dialing compliant with all TAPI phone systems

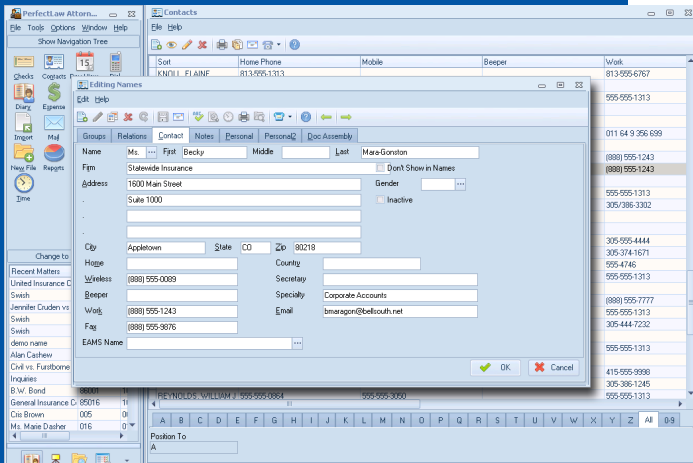
Effective communication is the key to providing quality service, creating persuasive marketing campaigns, and generating revenues for any business, especially law firms. Contact and relationship management does more than communication basics like organizing phone numbers and email addresses. CRM provides advanced functionality that helps in many ways, including tracking communications and billing.

One feature making PerfectLaw® CRM tools superior is the ability to maintain unique contact records. Contacts are never duplicated and every matter is related (linked) to the appropriate party and records via predefined relationships. This insures that each contact has a unique profile record in the database that can be linked to any number of matters and as well as other contacts. By maintaining a single unique contact record, phone numbers, email addresses, and other information are added and modified in one location while propagating the modifications everywhere instantly. Moreover, when any contact record is accessed, all matters related to that contact are listed under the related matters tab. From this listing, users have instant access, matter by matter, to all matter contacts, emails, phone notes, and correspondence.

Another key to CRM effectiveness is contact sharing throughout the firm. PerfectLaw® even supports contact sharing with Outlook® and mobile devices. More PerfectLaw® CRM benefits from advanced database functions and features are shown below.

PERFECTLAW®
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w w w . p e r f e c t l a w . c o m
1 . 8 0 0 . 7 4 9 . 6 2 0 0



Enter contacts once and create relationships to matters, documents, and other contacts



Search for contacts via relationships to the matter and/or other contacts

Benefits

- Quickly find info regarding all matters, docs, phone messages, email, and events that relate to a given contact
- Phone numbers and emails are always in sync between AIM®, Outlook®, and your mobile devices
- Enter contact data in AIM® once and use it throughout Microsoft® Office and with apps on your mobile device
- Always find the right contact quickly via advanced searching
- Increase business volume with pinpoint mailing lists and personalized marketing literature

Functions

- Create and store contact profiles and links automatically during matter intake workflow
- Edit the shared address book and contact profile database, subject to permission privileges
- Merge address book and contact profile into Word, PDF, WordPerfect form letters, emails, filings, and other templates
- Auto-dial phone numbers
- Create and track a database of phone notes and emails with searchable fields including: To/From contacts, Subject, Text, Day-Time, etc.
- Track and capture billable time while making phone calls and sending emails
- Create contact lists for mailing and marketing and sort by desired contact demographics
- Select and list contacts by relationship type, such as expert, examiner, or judge and review any documents, notes, and matters related to them
- Perform advanced conflict searches
- Combine and prevent duplicate contact records

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