

## WINDOWS EXPLORER IS NOT DOCUMENT MANAGEMENT

You may think that your system of filing documents in Windows Explorer is good enough for your law firm. You have established a protocol on file naming and storage, and all you need to do is make sure you always save documents with the right name and in the correct folder.

In reality, that is no simple task. It may take as many as ten mouse clicks to save a document in its proper place, and then you have to look at that little piece of paper taped to the edge of your monitor that tells you exactly how the file should be named (e.g. Client Name / Matter Number / Document Type). You're already running late for a meeting. So, you quickly save the document you've been working on for the last two hours to your desktop without specifying a file name – but you won't forget this one.

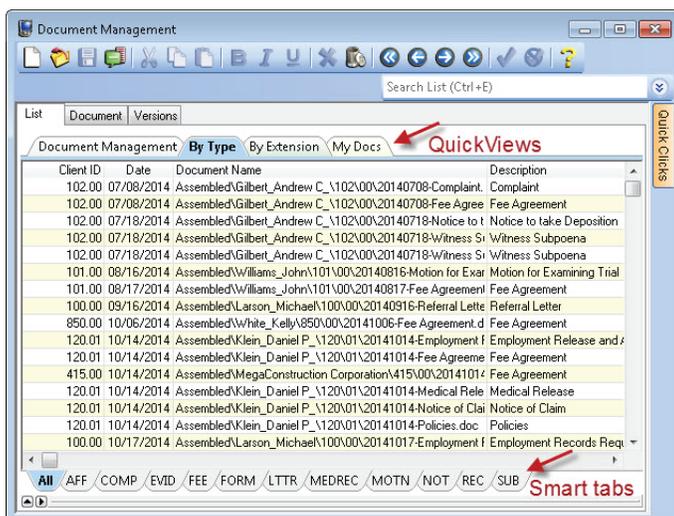
The next morning, you are unexpectedly out of the office and you remember that you need the important document you had worked on the day before. You call your assistant, who tries to find it in its proper place. It isn't there! Then you remember it's on your desktop. "Go turn on my computer and send me that unnamed document on the desktop," you say.

He replies, "Which one? I see at least a dozen random documents here."

If you rely on Windows Explorer, documents will not always be in the right place, and you will not always remember the exceptions to your own rules. Law firms without a document management system like the one included in PracticeMaster waste too much billable time searching for misplaced documents.

Using document management eliminates these frustrations. In PracticeMaster, documents are automatically named and stored so that nothing is lost.

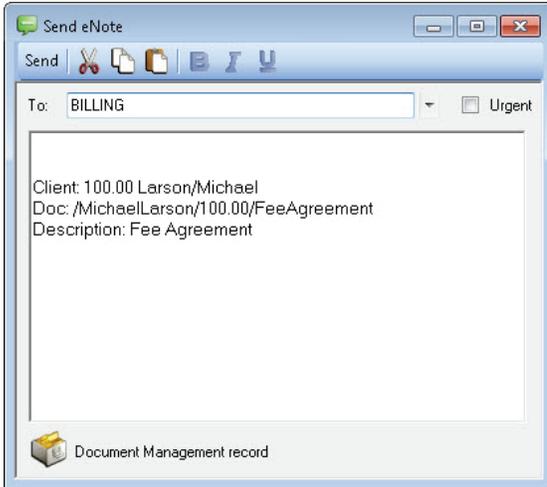
## WHAT IS DOCUMENT MANAGEMENT, AND WHY DO YOU NEED IT?



Document management automatically names your files, associates your documents to specific clients or matters and automatically stores them in the appropriate place every time you save a file. In PracticeMaster, you can sort and organize documents so that you can find exactly what you need in seconds. For example, sort them all by matter, by user, by file type, by document type, and more.

The first time you set up document management in PracticeMaster, you specify the naming convention that will be used for every document. Your colleagues will no longer need to be reminded how to name a document. Instead, they simply turn on PracticeMaster document management from Microsoft Word, WordPerfect, Adobe, or Outlook, and documents they save will automatically be properly named and filed. Documents you already have

can be sent to PracticeMaster via a right-click menu option "Send to PracticeMaster." Once you start using document management in PracticeMaster, you won't need to create a new folder for every new matter – the software will do that for you.



When documents are organized by PracticeMaster, collaboration becomes much easier. If more than one person works on a document, they can check it out of the software and check it back in when they're finished. That way, you will not have more than one person attempting to make changes to the same file at the same time. When a document is checked in, it can be saved as a separate version. These versions are saved so that you can look back at previous versions if necessary, or compare versions side-by-side. When the document is finished, use the Convert to Fee button to bill for your time spent creating it.

For quick and efficient intra-office sharing, PracticeMaster eNote allows you to send links to any of your documents to your colleagues. No more searching for a document to attach to an e-mail. Just click on the document record in PracticeMaster, and click the eNote button (Platinum version required).

## DOCUMENT MANAGEMENT SOFTWARE THAT IS PART OF YOUR PRACTICE MANAGEMENT SOFTWARE IS A WIN

When document management software is built in to your practice management software, managed documents are included in conflict of interest searches. Conflict of interest searches from practice management software also include e-mails, research notes, phone records, time entries, and more. When document management is included in practice management software, you don't have to create a client or list so that documents can be assigned to them.

In PracticeMaster, each matter has its own profile in the Matter Manager. This profile displays all vital contact information, a list of contacts who are associated with this matter, a custom toolbar that links to common tasks, alongside a timeline of all activity that has been done for the matter. Activity includes appointments, tasks, contacts, fees, costs, notes, area of practice information, e-mail, phone records, and documents.

## TAKE THE FIRST STEP

Download a free trial of PracticeMaster, and start thinking of all the time you will save when you use document management to keep your firm organized.