



## Practice Management - DATA SHEET

### Practice Management

- Time and Expense Entry
- Relationship Management
- CRM for Law Firms
- Marketing
- Docketing
- Conflict Management
- 2-way integration with Microsoft® Outlook/Exchange

“WE WERE LOOKING FOR A COMPREHENSIVE SOLUTION FOR ALL OF OUR ADMINISTRATIVE APPLICATIONS AND MORE. RAINMAKER PROVIDED THIS CAPABILITY.”

- Firm Administrator

Imagine a centralized, firm-wide database of information at your fingertips. View information through RainMaker Platinum or through our 2-way integration with Microsoft Outlook/Exchange or PDA-type devices.

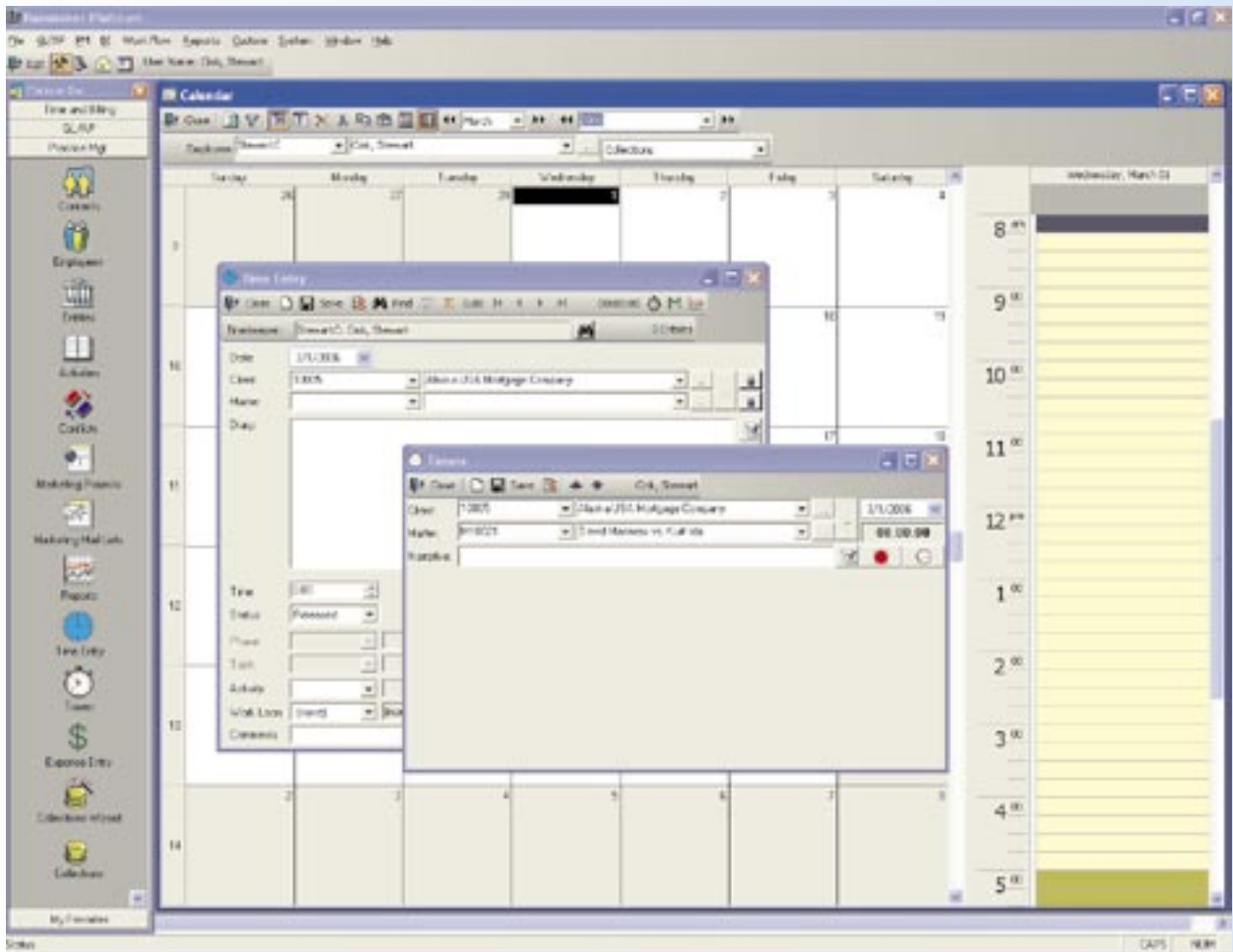
RainMaker's Platinum Practice Management is the attorney and staff desktop tool that manages the practice of law. It provides firm-wide collaboration on information about every client, matter, contact, referral, docket event, employee, mail list, potential conflict and business opportunity within your firm.

From Time and Expense Entry to Case Management and Marketing, RainMaker's Practice Management integrates all of the functions performed throughout the day into a cohesive flow of easily managed information.

Time and Expense Entry is an integral part of RainMaker's Platinum Practice Management software and therefore, reduces the amount of work required for setup and administration. All data entry, search and inquiry screens are clear, concise and highly intuitive. Reports are available on screen, in hard copy or as email attachments, providing immediate information for the attorney.

Time and Expense Entry includes capabilities such as “My Favorites” and timers, the entry of firm and client related expenses and the ability to change calendar views of billable and non-billable time by day, week or month. Time may also be entered through the fully-integrated e-RainMaker Web Time module or stand alone version for a mobile notebook user.







“We need a way to...”	RainMaker Platinum provided:
Save time by displaying a list of active matters while searching for a client.	A combined look-up by client or matter, then by selecting the appropriate matter, both the client and the matter numbers are filled in.
Streamline our lookup process.	A way to see a list of the last 10-20 matters a timekeeper worked on and select one from the list instead of doing a look-up
Conveniently set up short-hand codes with descriptions for each timekeeper.	User-defined short-hand codes with unlimited length descriptions can be set up by the firm or for individual timekeepers. Variables, with prompts to fill in the blanks, can also be embedded, such as Deposition of <<Enter Person’s Name>>.
Customize our calendar views to suit our specific needs.	A customizable calendar view, for each timekeeper, showing time by day, week or month. Daily summaries display for released and not released entries, as well as Billable vs. Non-Billable time.
Keep track of how much time is being spent on each activity using automated timers.	A timer function to automatically track the time spent on an activity. If the work performed will be split by multiple clients and matters, the timers can be set to automatically split the time across those matters.
Electronically enter and send timekeeper reimbursable expenses directly to accounts payable; streamlining processes.	Expense entry, where timekeepers are able to enter reimbursable firm or client related expenses that will be electronically sent to accounts payable for review, posting and payment.
Access to time entry from remote offices or while “on the road.” Also, our IT Department changes PC’s often and we need something that does not need to be altered every time we get new PC’s.	An added bonus, remote time entry with e-RainMaker Web Time. This allows time to be entered from any remote location with access to the Internet. Mobile Attorneys can enter time, using Stand-Alone Time Entry, from anywhere. When they return to the office, they can synchronize their time entries with the RainMaker Platinum system.





Core Module

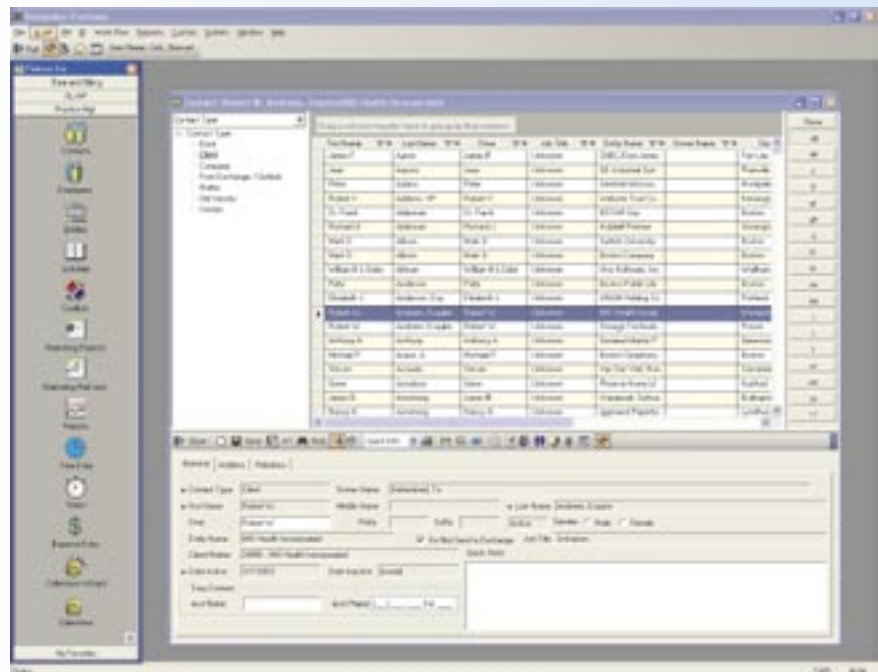
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“WE NEEDED TECHNOLOGY THAT WOULD ENABLE US TO HAVE ALL OF OUR CONTACTS AT OUR FINGERTIPS. RAINMAKER PROVIDED US WITH A FIRM-WIDE ROLODEX.”

- Accounting Manager

The Core Module of RainMaker’s Practice Management is comprised of three components: entities, contacts and employees. These form the basis of RainMaker Platinum Practice Management and are the beginning to any function performed by your attorneys and staff. Firms can manage their clients, cases, contacts, prospects and employees.





“We need a way to...”	RainMaker Platinum provided:
Store all of our contact information in one place.	Storing of unlimited addresses, phone, fax numbers and email addresses, with access at the user’s fingertips.
Add firm-designed custom data fields to the system.	An efficient way to add custom data fields with optional firm-designed validation. Users can only select items from a list to insure conformity. This is accomplished without the need for custom programming.
Save time formatting form letters and emails for each client.	Mail merge and email which creates form letters or email messages with a single click, for any client, contact or employee.
Easily personalize our communications with clients.	The ability to add a personal touch with special interest information, when dealing with clients.
Track CLE credits.	A way to easily track and report CLE credits with a multi-state module specifically designed for attorneys.
Easily find information to match up clients with attorneys using their background information already in the system.	The ability to track individual information. Find the right attorney for the job and present clients with a synopsis of the attorney’s background; languages spoken, noteworthy cases, areas of expertise, bars admitted, schools attended and articles written.





## Marketing

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“WE NEEDED A MORE EFFECTIVE WAY TO ORGANIZE OUR CONTACTS FOR MARKETING CAMPAIGNS. RAINMAKER PROVIDED THIS AND MORE.”

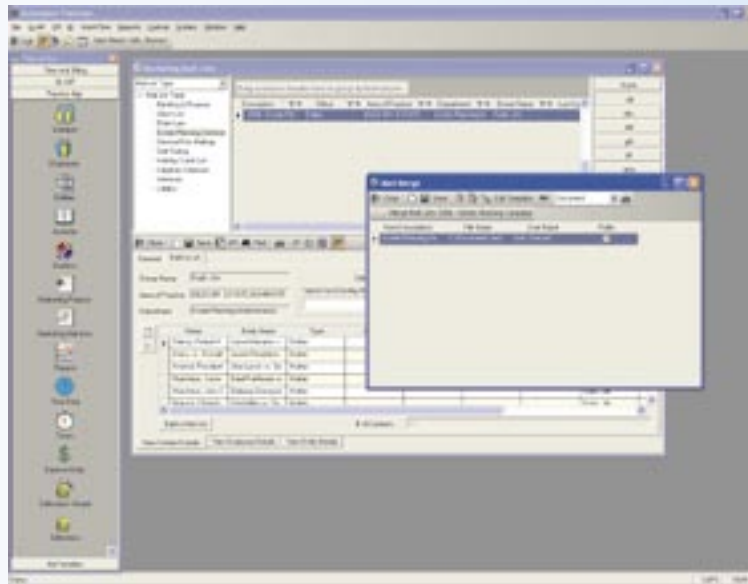
- Director of Business Development

RainMaker’s **Marketing and Mail List Management** module was designed to allow firms to market to new, existing and potential clients through Marketing Mail Lists and Marketing Projects. Using this module, you will soon master the art of marketing to new, existing and potential clients.

Users can eliminate redundant entries on mail lists and keep up-to-date names, addresses and emails for every contact and employee. The Marketing module allows users to schedule events, track responses and send email Alerts as reminders of tasks to be completed.

Additionally, users can work more efficiently by organizing vital client, prospect, contact and employee information. By editing contact information in the Marketing module, users will precipitate global changes throughout the database. Since RainMaker provides two-way integration with Microsoft Outlook, all changes to contact information made within RainMaker are passed to your Microsoft Outlook contact file. In the same fashion, changes in Microsoft Outlook are passed to RainMaker.





“We need a way to...”	RainMaker Platinum provided:
Merge our mailing lists together without duplicating names.	The ability to build new mail lists or merge mail lists together without the worry of creating duplicate names. The ability to select various criteria that a contact must meet to be on the mail list such as city, state, type of law, contact title, zip code, etc.
Easily export all contact data into a mail merge format for Microsoft® Word or WordPerfect.	An export wizard that provides an easy way to export the data into a mail merge format, used by word processing.
Setup and track all marketing projects. Also, we needed to customize our fields to track rating and surveys associated with the event.	A way to setup and track events. A mailing list can be associated with an event to send the invitations. This then provides the ability to track RSVP's and document notes. Custom fields can be set up to track ratings and surveys.





## Docketing

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“WE NEEDED A POWERFUL DOCKETING MODULE THAT PROVIDED 2-WAY INTEGRATION WITH MICROSOFT OUTLOOK. RAINMAKER PROVIDED US THIS CAPABILITY.”

-Litigation Partner

RainMaker’s Docketing/Scheduling module provides an easy way to manage people, time and critical events. Managers can quickly review activities, workloads and assignments with a click of the mouse. Users can view scheduled events in either a RainMaker Calendar screen or directly in Microsoft Outlook. Filters may be set to view events by a variety of criteria including by activity type, client, or location. Special features in Docketing allow for scheduling of time-sensitive activities based upon firm-defined court rules. The system provides real-time 2-way integration with Microsoft Outlook/Exchange. Additionally, attorneys can easily synchronize the RainMaker system with their hand-held devices for greater mobility. This allows users the flexibility of viewing their information in their Microsoft Outlook Calendar or a palm-top computer while retaining information in a central database.

**Using Microsoft .NET technology just point and click to improve your docketing.**

RainMaker Docketing is flexible enough to meet the needs of both the attorneys and the firm. A high degree of system security allows the firm to designate “edit” or “view-only” security options for each user. The system also automatically generates audit trails tracking the user, date, and time of all changes made to docket events. Firms can increase attorney productivity since just a single mouse click creates a time entry from a docket event. The time entry screen is automatically filled in with the appropriate client, matter information, date of activity and a description of the event for further editing.





“We need a way to...”	RainMaker Platinum provided:
Automatically send a reminder to attorneys of upcoming critical dates.	Event-driven “SmartAlerts” – an email tickler system that provides advanced notification to attorneys of critical dates.
Allow attorneys to view and edit their schedules in Microsoft Outlook, yet maintain central control.	A system with seamless integration to Microsoft Exchange and Microsoft Outlook, allowing information to flow freely in both directions.
Automatically turn docket events into time entries.	Advanced features including the ability to create a time entry from the information stored in a docket entry such as client/matter, date, duration and event description.
Integrate case management information into our docket reports.	The ability to include case information on detailed docket reports including case notes and related parties.
Record all changes made to the docket item.	A history of change, where users can see an audit trail of changes to the docket item, including a change to the date of the event.
Set up a template to create a series of related tasks that are required before and after the primary event takes place.	The ability to establish templates with a list of sub-events that must be completed. SmartAlerts can be set up for each sub-event.





## Conflict Management

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“WE NEEDED A COMPREHENSIVE SYSTEM FOR CONFLICT SEARCHING THAT WOULD HELP US MAKE FACT-BASED, FIRM-WIDE DECISIONS. RAINMAKER PROVIDED US THE CAPABILITY.”

-Executive Director

RainMaker's Platinum **Advanced Conflict Avoidance** module helps your firm manage conflicts of interest by utilizing the latest in search engine technology to perform critical searches through the entire database.

Advanced Conflict Avoidance integrates the use of the dtSearch™ engine – one of the fastest and most powerful search engines on the market today. You can perform unlimited Boolean searches with phonetic and proximity capabilities. By utilizing the fuzzy logic capability, the module can assist you in determining which results are the most critical. In addition, it allows you to filter your searches for more precise answers. You can drill down into the details of any hit on the results screen. You have the ability to set a limit of the number of hits to eliminate “runaway” and useless results. Searches that produce too many results can be further refined by adding additional criteria such as city, state or zip code. Advanced Conflict Avoidance will also keep a history of all your searches along with the results of each. Any search can be rerun, should there be a need.

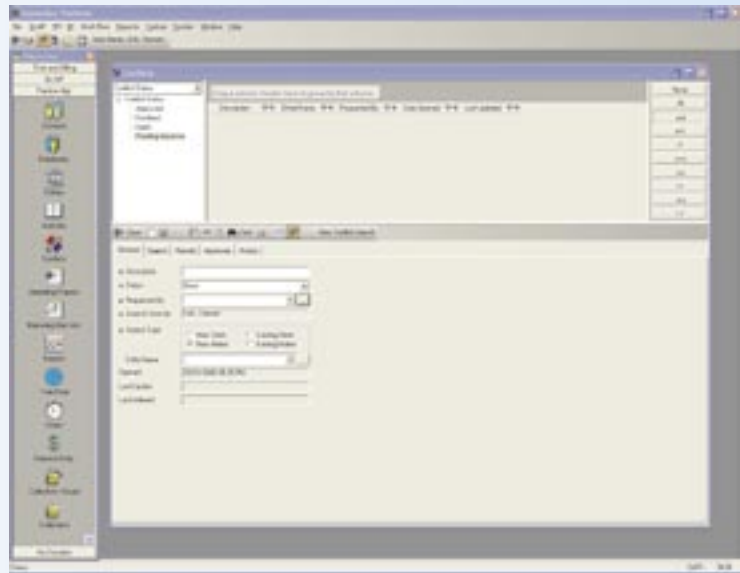
Advanced Conflict Avoidance not only speeds up the conflict process but also uses a more thorough method of searching. Because it is a knowledge-based system, Advanced Conflict Avoidance explores all areas of the database – clients, matters and contacts, including all notes and related items.

**Using Microsoft .NET technology just point and click to manage your conflicts.**





Firms now have the ability to search the U.S. Government’s Specially Designated Nationals (SDN) database. This database of known terrorists and affiliates can be downloaded periodically and included as part of any conflict search. The results yield an exhaustive analysis of all items that will affect your firm’s decision to take on a new client.



“We need a way to...”	RainMaker Platinum provided:
Quickly enter and look up all information without having to re-key.	A way for all entities and related parties to be entered into the New Case workflow module. When everything is entered, a search is run and the data is saved, pending approval. All future searches also look at the pending data for potential conflicts. Upon approval, all pending data is updated into the entity and contact tables, eliminating the need for re-keying.
Save time by quickly and easily finding the record that has caused the conflict.	Results Drill Down: An easy way to drill down to the record that has caused the conflict by clicking on any of the items in the results.
Process concise and detailed reports.	Detail and summary reports to aid in conflict resolution.





## Microsoft Outlook/Exchange Server Integration

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“WE NEEDED A WAY TO SYNCHRONIZE ALL OF OUR IMPORTANT INFORMATION SO WE ARE ALL ON THE SAME PAGE. RAINMAKER PROVIDED US THIS CAPABILITY.”

- Firm Partner

RainMaker’s **Microsoft Outlook/Exchange Server Integration** provides real-time, two-way synchronization of clients, matters, contacts, collection and docket activities between Practice Management and Microsoft Outlook/Exchange Server. This integration improves productivity and ease of use by allowing a user to manage contacts, docket events and collection activities while in Microsoft Outlook, or after downloading them from Microsoft Outlook to a PDA.

Contact Management Users have access to key contact and client information such as name, address, phone, fax and email address. Each contact has the RainMaker Practice Management designated contact type and owner information. The firm may select to set filters limiting those contacts that they wish to synchronize with Microsoft Outlook.

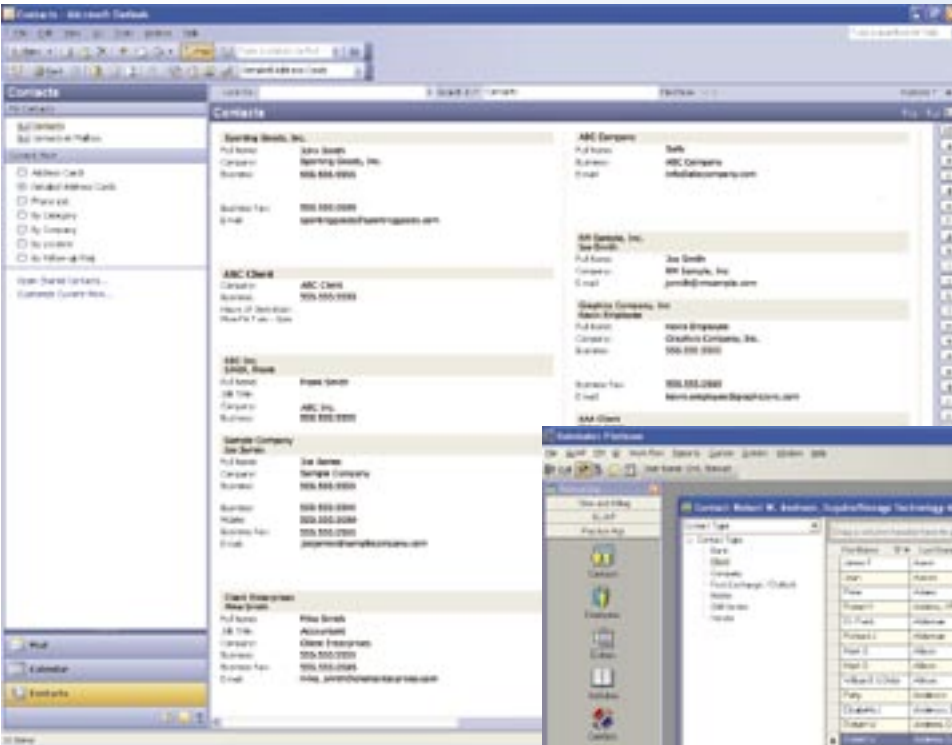
Based on security assigned by the firm, a user may either view or edit information on the contact screen. Information entered in Microsoft Outlook will immediately be synchronized with the RainMaker Practice Management system. Information entered in a handheld will update the RainMaker Practice Management system the next time it is synchronized with Microsoft Outlook.

The Microsoft Outlook integration with scheduled docket events or collections activities works much the same way as contacts. Events and activities appear for the “scheduled employee” in his or her Microsoft Outlook Calendar. Changes made to scheduled activities from Microsoft Outlook or a Palm device will be synchronized with the PM database just as with contacts.

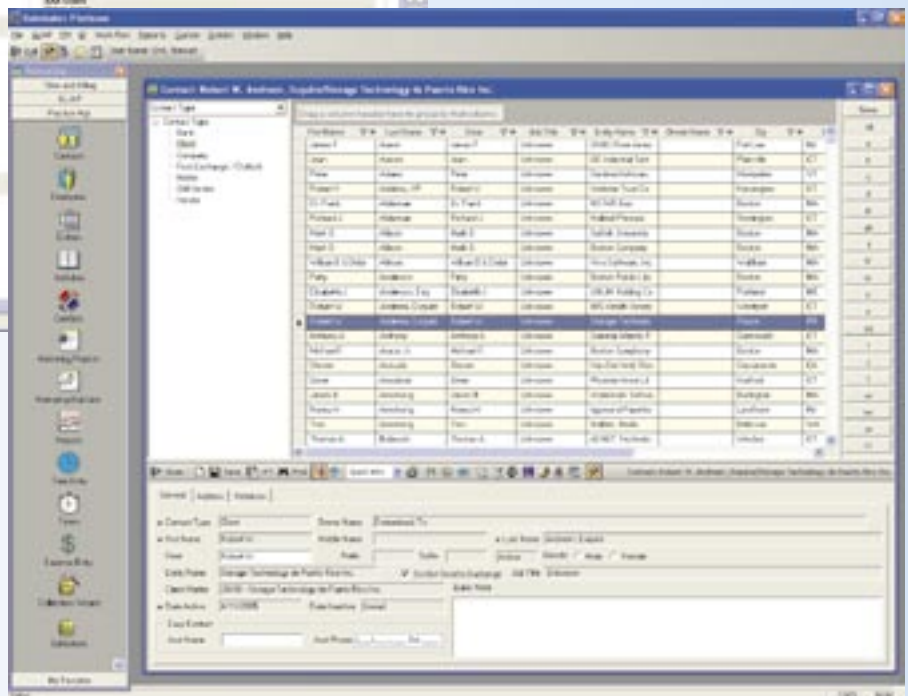


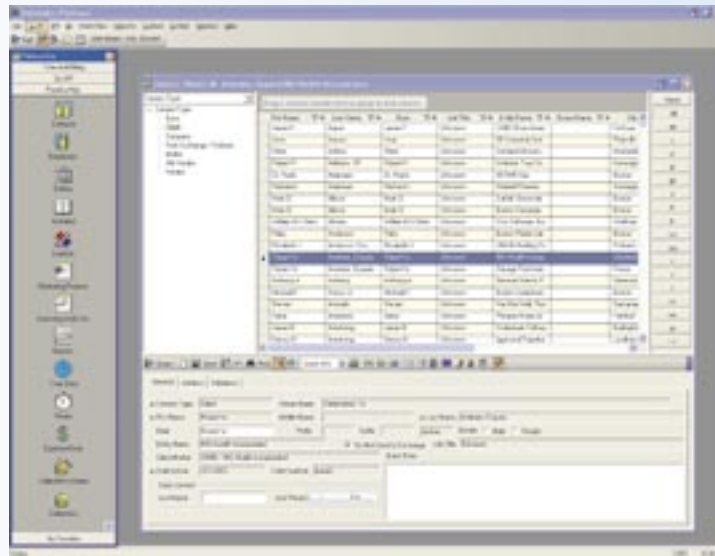


Microsoft Outlook



RainMaker Software, Inc.





“We need a way to...”	RainMaker Platinum provided:
Provide easy access to all contact information.	Real-time, two-way integration with Microsoft Outlook which gives our attorneys and others easy access to a firm-wide rolodex of contacts. Microsoft Outlook is instantly updated once any new contact or activity information is entered into Practice Management.
Get remote access to all firm information.	Access to critical information from remote locations via VPN or deployment by handheld devices. RainMaker Practice Management also synchronizes edits and new entries done on handheld devices.

Write Your Own Success Story

To learn more about the RainMaker Platinum Solution, please contact the sales department at 800.341.4012 x3413, [legalinfo@rainmakerlegal.com](mailto:legalinfo@rainmakerlegal.com) or [www.rainmakerlegal.com/contactus/](http://www.rainmakerlegal.com/contactus/).

