

## Outlook as a Billing and Practice Management System

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**Y**ou could build the world's tallest skyscraper on a farm in Montana, but it would not attract as much attention as if you built it in a large city. Location matters not only in real estate but software too. If Microsoft Outlook were a plot of land, can you imagine its value? And what if you built a legal billing and practice management system on top of it that connected everyone in your firm? You'd have a tool that everyone in your firm would use since everyone already uses Outlook. Guess what? We're not talking architectural blueprints here. This product already exists.

### Credenza Pro ... in One Sentence

Credenza Software's **Credenza Pro** is a multiuser billing and practice management system that runs within Microsoft Outlook.

### The Killer Feature

Because Credenza Pro resides in Outlook, once you create or approve a bill you can email it to a client immediately and share that message with other colleagues. The email integration goes even further. For example, you can batch send invoices and reminders for overdue invoices, again without having to go through some sort of export procedure since you're right in Outlook.

Before you get to the point of sending a bill, you'll find a number of legal-specific billing features. Credenza Pro enables you to track

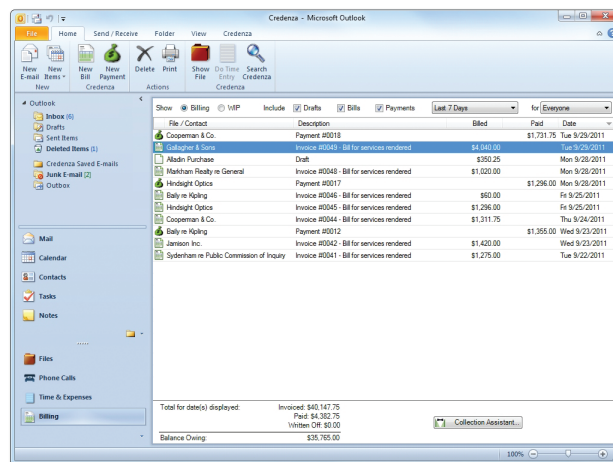
your time and expenses, review work in progress, and manage retainer and trust accounts. An assistant or bookkeeper can even enter time for the lawyers in your firm.

"The beauty of Credenza Pro's integrated billing and practice management capabilities is that it's all done from Outlook," Credenza Software President Ron Collins told us. "Since Outlook is so widely used, its transformation into a billing tool is a valuable asset for law firms that require a cost-effective integrated solution."

### Other Notable Features

Credenza Pro works in any size law firm. Each user can choose which information to keep private and with whom. For shared client files, Credenza Pro displays to those granted access activity, appointments, bills, contacts, documents, email, events, tasks, and all other associated information.

Unlike most practice management systems in which you must choose between traditional software or the cloud, Credenza Pro uses a hybrid approach. It runs fast because the software is local, but your data is securely synced via a SQL database hosted on Microsoft's Windows Azure cloud platform. If you don't have Internet access



such as on a flight, you can still use Credenza Pro. Any changes you make will be synced and then shared with your colleagues when you again connect to the Internet.

Other features include document management, full-text searching, notes and task management, and telephone messages.

### What Else Should You Know?

Credenza Pro costs \$24.95 per user per month. The company also offers for free Credenza Basic, which lacks the billing and Teams features. Both versions work with Outlook 2003 and later.



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