



All
Practice Management Solutions
Are Not Created Equal



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A Comparison of Amicus Attorney Features and Clio Features

Introduction

Today's business climate demands that an attorney's practice management be as integrated and streamlined as possible. It's not just about the cloud - it's about what you get for the investment you've made. On a three year basis, the Total Cost of Ownership of the Amicus Attorney Small Firm Edition software product is more economical than a typical Clio web based solution. Our related whitepaper [Desktop v. Cloud: Accurately Comparing the Costs of Amicus Attorney and Clio](#) discusses this more fully in a three-year cost comparison. The considerations in running a profitable practice today go beyond cost analysis alone, though. As a lawyer and business manager you want the truth about the most superior functionality you can get. Not only is Amicus Attorney's Total Cost of Ownership over three years lower than Clio's, Amicus works better.

The functionality of Amicus Attorney's desktop practice management solution is dramatically different than Clio's cloud-based legal practice management solution. When it comes to evaluating the real advantages of different solutions, it's important to have an understanding of the features you are going to need to streamline your legal practice and generate more revenue. Amicus Attorney's natural workflow and proactive assistance give it a range of functionality that the Clio solution doesn't have. This whitepaper will describe some of the Amicus Attorney features that Clio doesn't offer related to performance, integration, time management, team utilities, calendar functionality, appointment detail, tasks detail, file index capability, communications, practice reminders, custom dashboards, library view, notes and administrative utilities. The advantage of Amicus Attorney's superior functionality is that it reduces all of the burden and complexity of management processes so that you can spend more of your time practicing law and billing for it.

Rethinking the Paradigm

The current paradigm shift is not just about the cloud; it's also about the old assumptions related to costs of computing being reversed. The shift in emphasis has changed from the cost of technology to the cost of effective management of your law practice. Flexible, easy, and productive legal practice management is now one of the cornerstones of a law firm's success.

Amicus anticipates how you can increase productivity by offering features that all work together to run your legal practice more effectively. From the moment you first open your practice management solution, Amicus reminds you about tasks that need to be done, appointments in your schedule that have changed, calls that have come in or time on a particular file that needs to be entered and logged. With Amicus solutions you are the one who can decide and set up what you'll be reminded about - according to your own needs. Every function has multiple ways of being done and you can customize Amicus to work as you work. The result is that you're not only working in a way that's the most comfortable for you, you're increasing your profitability because your management processes are optimally smooth and efficient - as you've customized them to be.

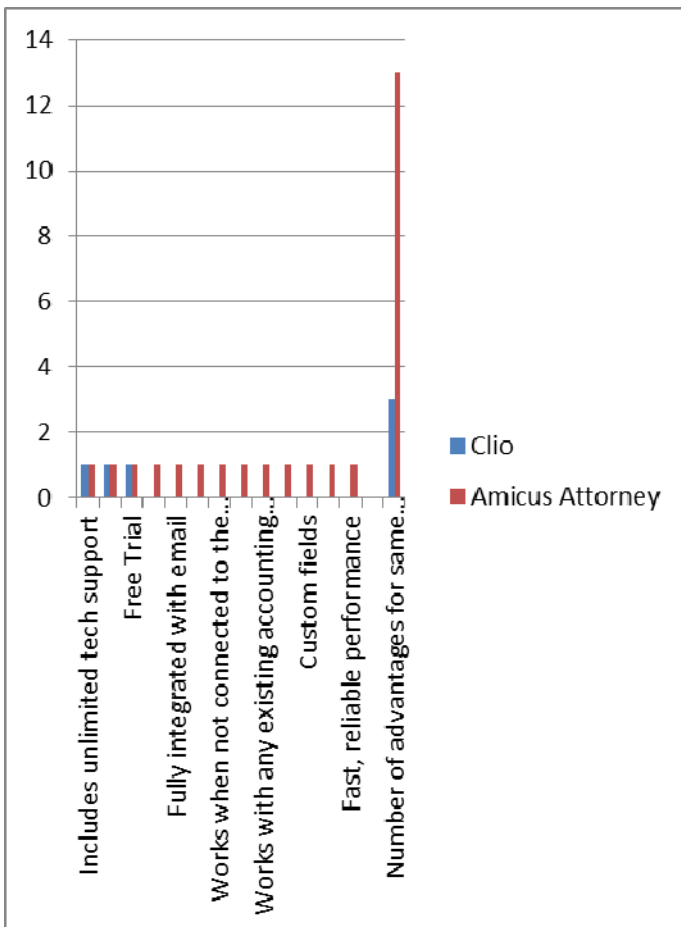
The difference with Clio is less functionality. You can't customize features in depth or really decide how you'd like to work. You have to use QuickBooks whether or not it's your accounting program of choice. You have to go back to a separate module to do something that isn't connected to what you've just been doing. There is no floating timer. There



are no alerts to remind you about details. There is no library view, notes, or admin utilities. The synchronization with Outlook isn't integrated.

Amicus Attorney Offers More Robust Functionality

	Clio	Amicus Small Firm Products
Cost for 3 years (Based on 2attorneys and 2 assistants)	\$5,328	\$3,336
Includes unlimited tech support	Yes	Yes
Includes all enhancements and upgrades	Yes	Yes
Free Trial	Yes	Yes
Installation	No	Yes
Fully integrated with email?	No	Yes
Integrate with Outlook calendar & contacts?	No	Yes
Work when not connected to Internet?	No	Yes
Includes legal accounting	No	Yes
Work with any existing accounting system the firm has?	No	Yes
Document assembly	No	Yes
Custom Fields	No	50 per file type Unlimited file types
Customize lists, categories and labels?	No	Yes
Fast, reliable performance?	No	Yes



In a basic feature comparison Amicus Attorney offers much more functionality of Clio – which means more value for your investment. Both solutions offer unlimited technical support as well as all enhancements and upgrades. Both offer a free trial as well. But that's where the similarity between Amicus and Clio ends.

In addition to offering free installation, Amicus Attorney is fully integrated with email and integrates easily with your Outlook calendar and all of your Outlook contacts. Amicus Attorney's integration also lets you embed an Outlook view right inside the Amicus Communications center.

You can link dynamically to any existing accounting system in your firm. Clio links only to QuickBooks.

In Amicus Attorney's document assembly, you can generate documents from assembled information that is automatically supplied from Amicus files, calendar, people and time entry records. With Amicus you can customize 50 fields per file type and customize an unlimited number of file types – as well as customize lists, categories and labels.

You can work on Amicus Attorney whether you're connected

to the Internet or not, and you'll always get blazing fast performance.

A Day in the Life of a Legal Attorney Requires Powerful Functionality

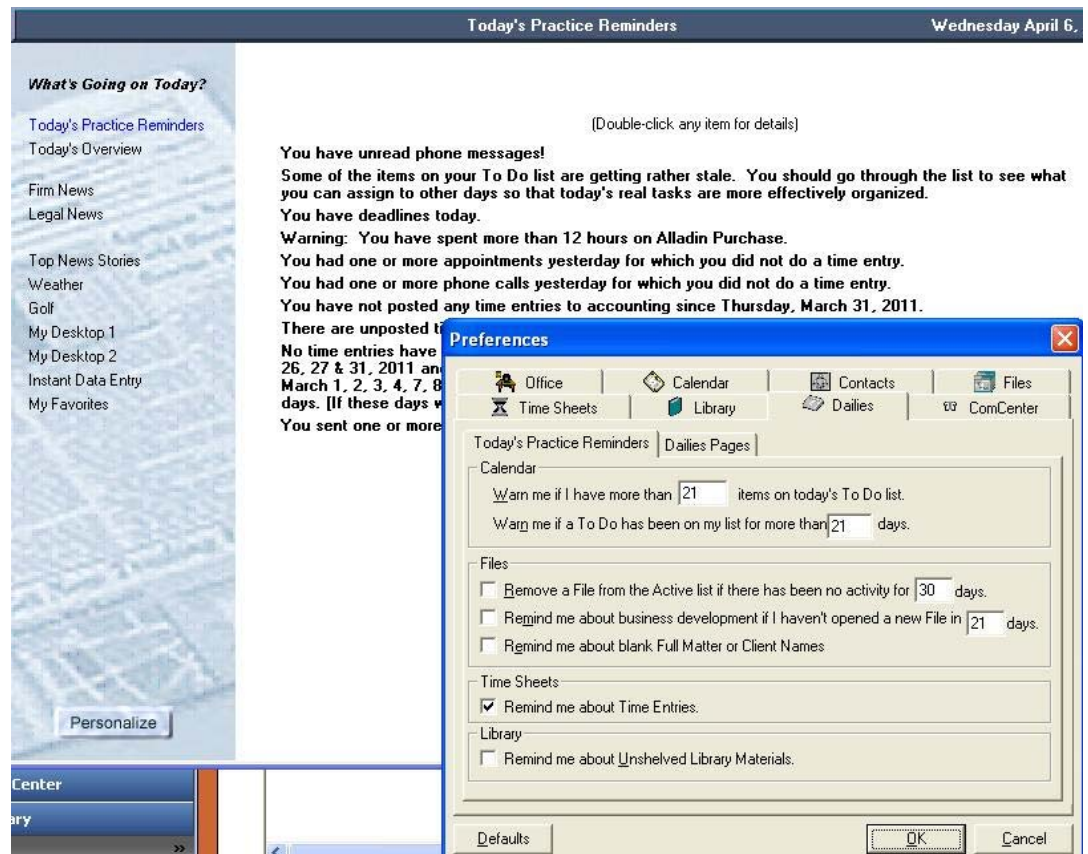
Let's take a walk through one day in your life as an attorney. You've just opened up your Legal Practice Management Solution and you're wondering what in your practice needs your attention the most.

If you're in Amicus, the Dailies view is where you'd catch up on all the things that went on since you were last logged in. You can find out about unread phone messages, old items on your To Do list, or past appointments that you didn't do a time entry for. **The Practice Reminder** feature lets you set practice reminders to manage your practice the way that works the best for you. This isn't offered by Clio.

In Amicus Attorney you'd probably set up your **Custom Dashboard** to see the Dailies view so you could go to Amicus Practice Reminders first when you open the program. Your own dashboard might consist of outstanding To Do's, new To Do's, Today's Appointments, New Appointments, a Calendar, Outstanding Phone Messages, and Today's Phone Calls. In Amicus Attorney each user can create and customize multiple dashboards to display your data how you like to see it. This isn't offered by Clio.

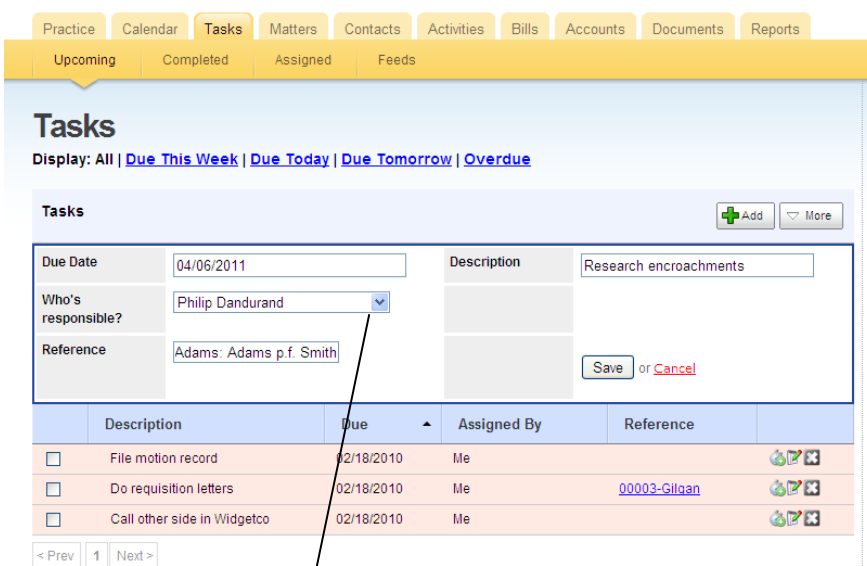
If your Practice Reminder let you know that you have unread phone messages, you'd click that hyperlink and go straight to Amicus Attorney's **universal Inbox** for all Calls, Messages and Emails, that integrates beautifully with Microsoft Outlook. Clio doesn't have any communications functionality that includes **an embedded Outlook view**.

You'd like to look something up in one of your files. In Amicus Attorney's **Files Index** and Details it's possible to use the interactive business card to email, correspond with, fax or call (auto-dial) anyone on the matter, apply a Precedent, and view a chronological listing of all items. The flexibility of Amicus Attorney filters lets you select by Appointments, Tasks, Notes, Time, just your own items, or All. Amicus custom fields let you customize for each type of law, and you can search documents on a matter, see your items, or all items on the File.



You've just seen in Amicus that some of the items on your To Do list have been there too long. Since **Amicus Tasks** are carried forward from day to day and kept on the list until they're done, the program is suggesting ways to streamline your day to be more productive. The only detail that Clio offers in its Tasks Detail is identifying who is responsible for the task. In comparison, you can use progressive priorities on Amicus Tasks, create repeats, and flag a To Do as a Milestone. In the Tasks you are able to draft a document, call a client, send an email, or launch research in one click using one convenient drop-down menu.

Clio Tasks









The screenshot shows the Clio Tasks interface. At the top, there are navigation tabs for Practice, Calendar, Tasks, Matters, Contacts, Activities, Bills, Accounts, Documents, and Reports. Below these are sub-tabs for Upcoming, Completed, Assigned, and Feeds. The main heading is "Tasks" with a display filter set to "All". There are links for "Due This Week", "Due Today", "Due Tomorrow", and "Overdue".

The "Tasks" section includes a form for adding a new task. The form fields are:

- Due Date: 04/06/2011
- Who's responsible?: Philip Dandurand (dropdown menu)
- Reference: Adams: Adams p.f. Smith
- Description: Research encroachments

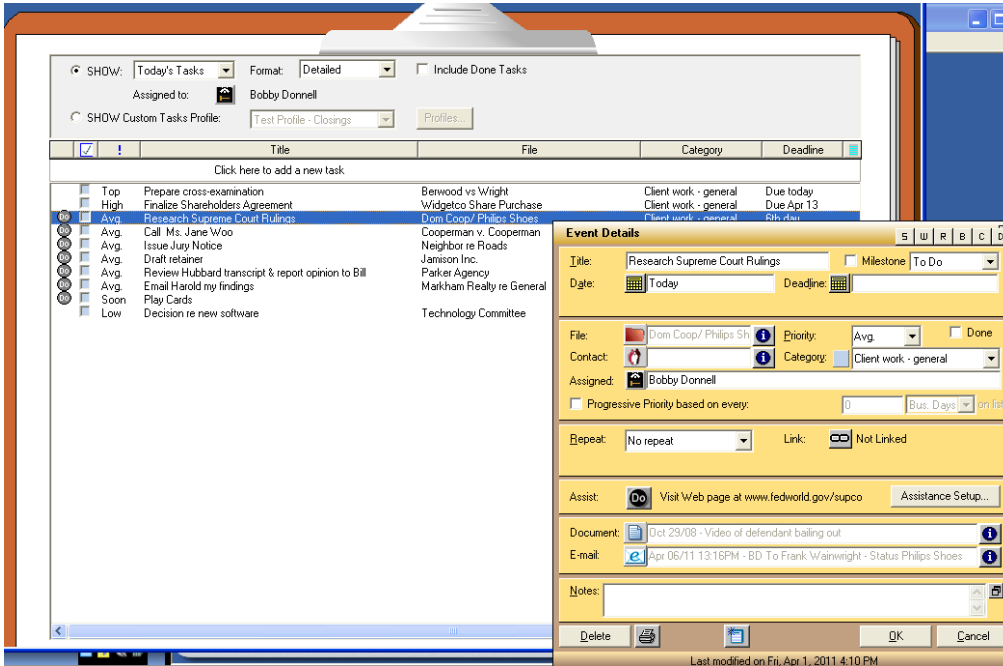
Buttons for "Add", "More", "Save", and "Cancel" are visible. Below the form is a table of tasks:

	Description	Due	Assigned By	Reference	
<input type="checkbox"/>	File motion record	02/18/2010	Me		 
<input type="checkbox"/>	Do requisition letters	02/18/2010	Me	00003-Gilgan	 
<input type="checkbox"/>	Call other side in Widgetco	02/18/2010	Me		 

At the bottom left, there are navigation controls: "< Prev", "1", and "Next >".

This is the Clio Task Detail

Amicus Tasks



You have a warning that more than 12 hours was spent on a particular file that you've been working on, and that time entries on another matter haven't been posted. With Amicus you can **manage your time** and "post" it whenever you're ready, which helps you to recover lost time. There's built-in support through task-based billing, and **the floating Timer Toolbar is available no matter what view you're working in**. You can recover lost time using Amicus' Time Entry Assistant to capture all your activities, and the Statistics view helps you track your goals. Clio doesn't have a floating timer. To turn on a timer in Clio, you have to go into the File and turn one on. The result is that by doing this you automatically turn another timer off.

It's time to link to your accounting program of choice and there won't be any server-based integration limitations. **Amicus integration** includes dynamic links with PCLaw, Timeslips, QuickBooks, Amicus Accounting, Juris and Tabs, as well as integration with HotDocs and CompuLaw. Amicus also provides an Amicus Tasks Toolbar in Microsoft Word and WordPerfect and Adobe Acrobat/Reader. The Amicus email integration with Outlook makes importing contact and calendar information easy. While Clio links with QuickBooks, it has a lack of integration with server-based programs.

Glancing further through your Practice Reminder in Amicus, you see that a group event needs to be scheduled. You'd like to see who is available. You'd also like to be notified by email who will or won't be able to attend. With **Amicus Team Utilities** you can check whether your colleagues are available or not, find out when they're due back, and set your availability to "Do Not Disturb" or "Working From Home". You can also find out who is responsible for Files not in your list and send a Sticky. In the **Amicus Appointment Detail** view, you can automatically notify clients by email about changes to appointments. Amicus lets you attach a document or an email to an appointment or an Event. You can show Adjournments and link Events as well. You can also link events to your To Do's and file To Do's as milestones. Amicus Attorney's **Calendar functionality** also lets you create and save multiple calendar profiles including an "event" category profile, link events for convenient group scheduling, and receive email notifications of all calendar events. Clio doesn't have any of this detailed functionality built in to its program.



As you've gone through your day, some ideas came to mind that you wanted to pursue. **Amicus Notes** are a feature for sending and receiving Sticky messages to or from other Amicus users. Jot down thoughts quickly and convert them to appointments, To Do's, phone calls, messages, or time entries later. You can attach Notes to Matter Files and organize all of your unassociated Notes in the Notes view. There's nothing like this offered by Clio.

The Amicus **Library View** is where you perform all of your knowledge management. You can manage your own and your firm's research and precedents, both internal and external. In a fast and easy way you can attach any particular research to Matter Files, or use complex queries to locate information. There's nothing like this offered by Clio.

Amicus **Admin Utilities** help anyone to mass change User Assignments on Files and Contacts, mass delete selected data, and manage a firm News Page that appears in each user's Dailies view. This is also the "control center" where you can customize new File Intake forms based on the most common types of law that your firm.

At the end of the day, your choice of legal practice management software - cloud-based or desktop – will depend on how much functionality you need to streamline your practice and increase your bottom line. Amicus Attorney's robustness demonstrates that all practice management systems are not created equal. Amicus is not only more affordable than Clio's SaaS solution, its integration helps you spend more of your time practicing law and billing for it.