

**Case, Matter, & Practice Management System
Software Web Site**

Sample Proposal Evaluation Worksheet

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Evaluation Criteria	Company A	Company B
Product Name		
Company Name		
Company Address		
Company Phone		
Company Contact		
Company Fax		
Company URL		
Company Email		
Year Company Formed		
# Installed CMS Sites		
Oldest Maintained CMS Site		
Largest CMS Site		
Firm Size Marketed		
Private Practice - Corporate Dept.		
On site Demonstrations		
Trial period before purchase		
# CMS Updates per year		
SW Cost per User		
Installation Cost		
Customization Cost		
Training Cost		
Project Management Cost		
Annual Support/Maintenance Cost		
Total Cost to Firm		
Amount Training Required		
Toll-free Support		
Server Requirements		
Desktop System Requirements		

Evaluation Criteria	Company A	Company B
Source Code in Escrow		
Client Rolodex		
Customizable Data Fields		
Appointment Calendar		
Rules Based Calendar		
Calendar Integration - Outlook, Groupwise		
Case Number Assign (auto/manual)		
Case Numbering (alpha/numeric)		
Cost Tracking per case		
Case Notes/Diarying		
Conflict of Interest Check		
Merge with WordPerfect (version)		
Merge with Word (version)		
Merge on Pre-set Date		
Merge on Pre-set Event		
Document Templates Provided		
Practice Area Templates		
Number Standard Reports		
Customizable Reports		
Report Writer		
Case Archive		
Case Export		
To Do Lists		
Email Integration - Outlook, GroupWise		
Time & Billing Integration		
Password Protection		
Remote Diagnostics		
Download CMS info to Laptop		
Bi-directional link to PDA		