



Perceptive Software
Measurable Results

Practice Management



Unable to
see the Big Picture
and the Details?

Orion Provides a Complete Solution for Law Firm Management:

Contact Management

Smart Timers®

Automatic Time Capture

Docketing

- Case Vs. Firm Level

Critical Date Management

Tasks Lists

Appointment Tracking

Powerful Clipboard

Document Merging

MS Office Productivity Tools

Automatic Matter Assignment

Client Intake Management

Report Writer

Customizable Fields & Views

Synchronization

- With Outlook & Exchange

Work Flow Management

Marketing Management

- Client/Referral Association

Client Communications

iOrion®

- Mobile Access

- Remote Connectivity

Calendar Management

Advanced Event View

Event Classification

E-Mail Management

Contact/Matter Relationships

Referral Source Tracking

Relates Financial Information

Document Assembly

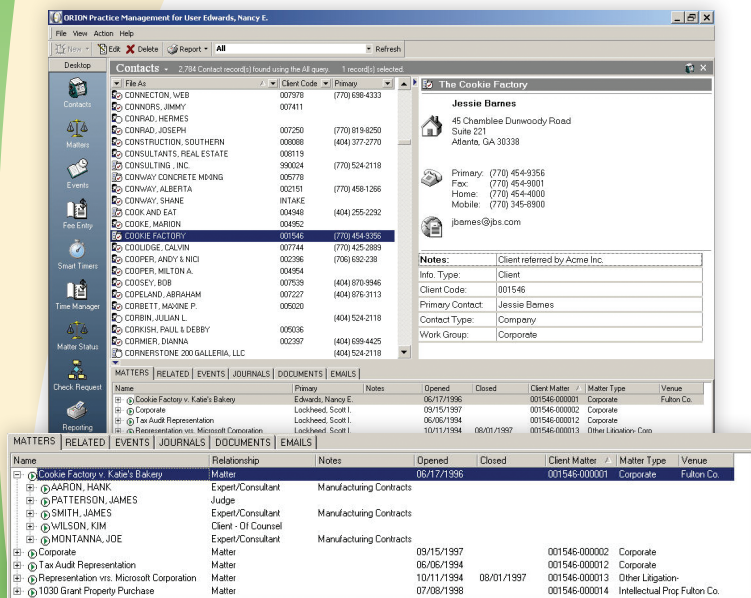
Custom Report Generation

Case Management

The Orion Practice Management System puts critical data right on your desktop. Everything you need to know about your firm: Case Management, Docket, Calendar, E-Mails, Contacts, Communications, Financial Statistics and Client Documents.

For the first time, Orion Practice Management enables law firms to move from a big picture view to the smallest detail efficiently and effortlessly - all in real-time and on-demand.

The Orion Practice Management System does the information-gathering work, allowing you to quickly and efficiently check the pulse of the firm and its operations at any time.



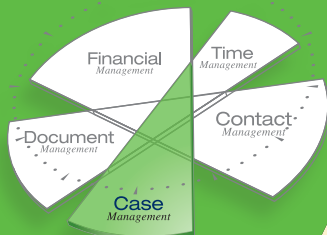
Exchange Sync Module

Orion's Exchange Sync software enables real-time synchronization of contacts, tasks (to-do's) and calendar items (appointments) between Orion's Practice Management System and Microsoft Outlook via direct access to Microsoft Exchange. This integration improves productivity by allowing users to view and edit information from a user's Smartphone (e.g. Blackberry®, iPhone® or Android®).



The Orion Practice Management System relates contact and case information to every e-mail and every document. Tightly linked to Orion's Financial Management System, the Orion Practice Management System has the ability to capture billable time from all of your Client Communications whether phone calls or emails.

By working directly with Microsoft Exchange, law firms can continue utilizing any number of services such as Microsoft Active Sync, Blackberry Enterprise Server or Windows Platform software. No longer will attorneys be restricted to their offices.

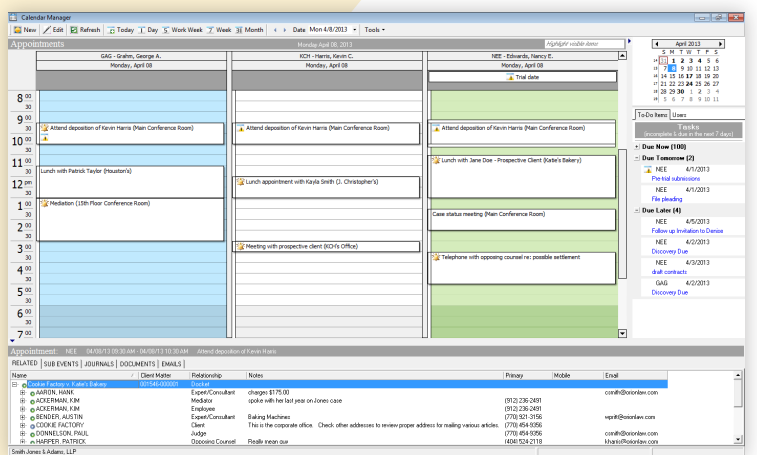


Calendar Event Management

Docketing Court Dates and Rules-Appointments-Tasks

Orion's Calendar system provides your firm with all you need for Docket Management. Coordinating tasks, deadlines and resources...doesn't need to be a time-consuming exercise.

The Orion Practice Management System allows you to view the appointments of multiple people side-by-side in a user-friendly format, along with your tasks listed in the "To-Do" list. Orion's Calendar Manager also lists matters and contacts as they are related to your appointments.

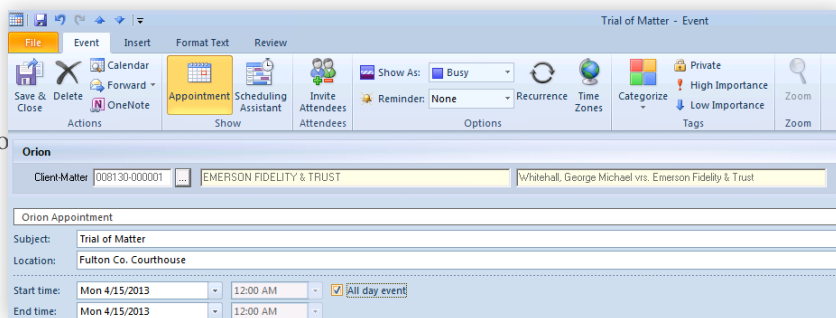


Calendar View

- Day, Week & Month
- Task Ordering
- Advanced Event View
- Reminder Alerts
- Docketing & Critical Dates
- Jurisdiction Control
- Sub-Events for Project Management
- Event Classification
- Custom Event Types

Microsoft Office Productivity Pack

Orion's Microsoft Office Productivity Pack makes managing appointments even easier. Appointments can now be created and linked to their corresponding Client/Matter outside of Orion, by using Microsoft Exchange Appointments. Orion has also integrated Smart Timers, which can be related to Client/Matters, into Microsoft Office Applications such as Outlook and Word.

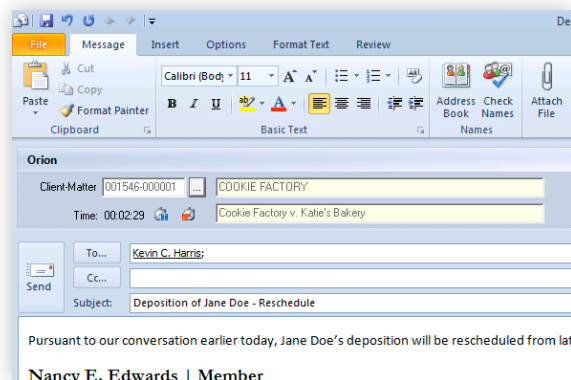


Critical Date Management

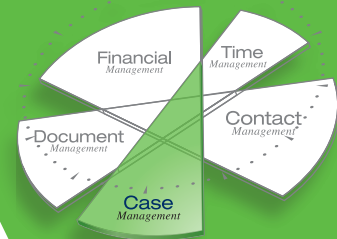
Critical Date Processing, also known as Docketing, allows you to automatically create a set of Critical Tasks and Appointments based on a defined list of rules in Orion. In the Critical Dates group, you can set up the location where the task or appointment will take place, along with specific date rules and protocols.

Easily draft an email or document and associate the Client/Matter at the same time.

Never miss an opportunity to record time with Smart Timer Integration in Microsoft Outlook.



Case Management



Staying on top of case deadlines, work product and documents is critical. The Orion Practice Management System aggregates critical data to a single screen, creating a Case Management Dashboard that allows you to run your practice more efficiently.

Case View

- Case Lists
- Case Data Mining
- Case Detail
- Related Contacts
- Related Events
- Related Journals
- Related Documents
- Related E-Mails

Cookie Factory v. Katie's Bakery

Client Name: The Cookie Factory
Matter Type: Corporate
Jurisdiction: Fulton Co.

Client DOB: 4/14/1975
Client SSN: 222-222-2222
Employment Division: CENTRAL
Employment District: NORTHERN
Assigned Atty's PK No.: 3425A
County: Fulton
Case Type: Estate
Case Number: COK-12345
Defendant(s): Katie's Bakery
Plaintiff(s): Cookie Factory

Name	Relationship	Notes	Primary	E-Mail	Main Address
AARON, HANK	Expert/Consultant	Manufacturing Contracts		AHANK@MLB.com	1893 Hickory Creek Court, Acworth, GA 30102
COOKIE FACTORY	Client	Client referred by Acme Inc.		Baners@bju.com	45 Chamber Dunwoody Road, Suite 221, Atlanta, GA 30338
MONTANA, JOE	Expert/Consultant	Manufacturing Contracts		pm@rvt.com	2020 Rivercliff Drive, Roswell, GA 30076
PATTERSON, JAMES	Judge			jp@orionlaw.com	2000 Main Street, Atlanta, GA 30338
SMITH, JAMES	Expert/Consultant	Manufacturing Contracts		james@USINC.com	101 Park Ave, New York, NY 10178-0061
WILSON, KIM	Client - Of Counsel			kwilson@orionlaw.com	4500 Miami Circle, Suite 221, Washington, DC 20005

View all documents, e-mails or contact information for every party in a case - all on one screen.

Matter: 001050 Harris, John

General | Additional | Events | Related | Billing Information | Journals | Documents | Emails | Vehicle Info | Incident

General

Type of Incident: Rollover
of Vehicles: 1
of Passengers: 2
Date: Wed, 07/11/2007

Location

Intersection/Address: s/b Hwy. 73
City: Port Arthur
County: Jefferson
State: TX
ZIP:

Injury Severity

Fatality: ☐
Severe: ☒
Minor: ☐

Additional Incident Information

Notes:

Data View Designer - Incident

Incident

General

Type of Incident: [IN Type of Incident]
of Vehicles: [IN Nu] Date: [IN Incident Date]
of Passengers: [IN Nu] Time: [IN Incident Ti]

Injury Severity

Fatality: ☐
Severe: ☐
Minor: ☐

Location

Intersection/Address: [IN Intersection]
City: [IN City]
County: [IN County]
State: [IN State]

Additional Incident Information

Notes: [IN Notes]

Display Name	Table Field	Required
IN Type of Incident	Incident.IN_Type	False
IN Number of Vehic...	Incident.IN_Numo...	False
IN Number of Pass...	Incident.IN_Numo...	False
IN Incident Date	Incident.IN_Date	False
IN Incident Time	Incident.IN_Time	False
IN Fatality Involved	Incident.IN_Fatali...	False
IN Intersection	Incident.IN_Intere...	False
IN State	Incident.IN_State	False
IN Zip Code	Incident.IN_Zip	False
IN County	Incident.IN_County	False
IN Notes	Incident.IN_Notes	False
IN City	Incident.IN_City	False
IN Severe	Incident.IN_Polic...	False
IN Minor Injury	Incident.IN_Minors	False

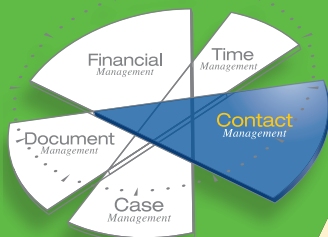
Object Inspector

cmsLookupCombo1

AutoDropDown	False
AutoSelect	True
Color	-2147483643
DropDownCount	8
DropDownWidth	0
Enabled	True
Font	(Font)
Height	21
ItemIndex	-1
Left	94
LookupView	Type of Incident
MaxLength	0
Name	cmsLookupCombo1
ReadOnly	False
RelatedProperty	IN Type of Incident
Sorted	True
Style	csDropDown
TabOrder	0
TabStop	True
Top	24
Visible	True
Width	217

Data Tracking & Reporting

Orion makes tracking complex case data easy. With a built-in data design wizard, custom views, tables and fields are setup within minutes. When used in conjunction with Orion's Document Assembly – Work Flow Process Manager, data is entered once and then merged into any number of case related documents. Add to this the ability to query and write custom reports with Orion's report writer, providing your Client with a Case Status Report has never been easier.



Contact Relationship Management

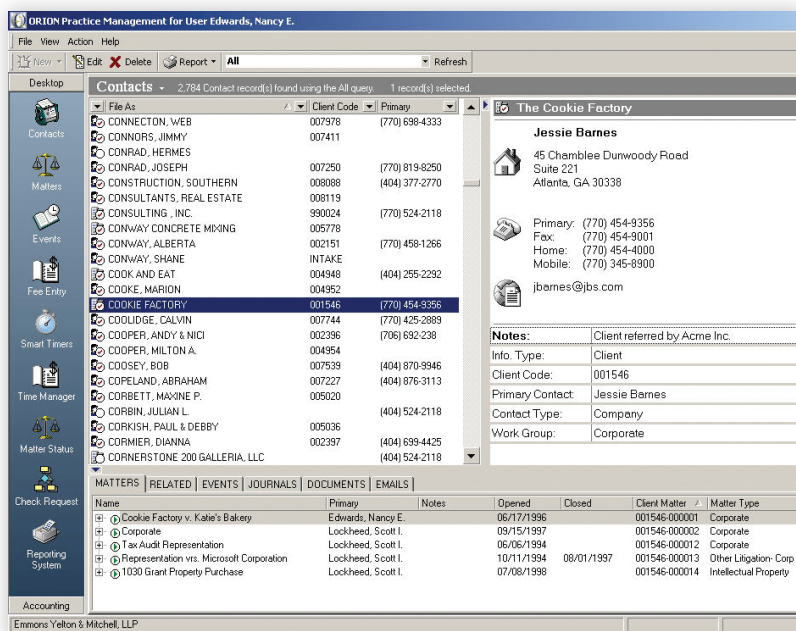
Orion Helps You Grow Your Practice

Effective contact management produces solid Client relationships, improves Client retention and builds a robust pipeline of referrals. The Orion Practice Management System associates contacts with Clients and referrals, allowing the firm to efficiently market its services and grow its Client-base.

Contact View

- Contact Lists
- Marketing Business Intelligence
- Contact Detail
- Related Matters
- Related Contacts
- Related Events
- Related Journals
- Related Documents
- Related E-Mails

View related contacts, all work performed by attorneys and staff: e-mails, documents, phone calls or docket events.

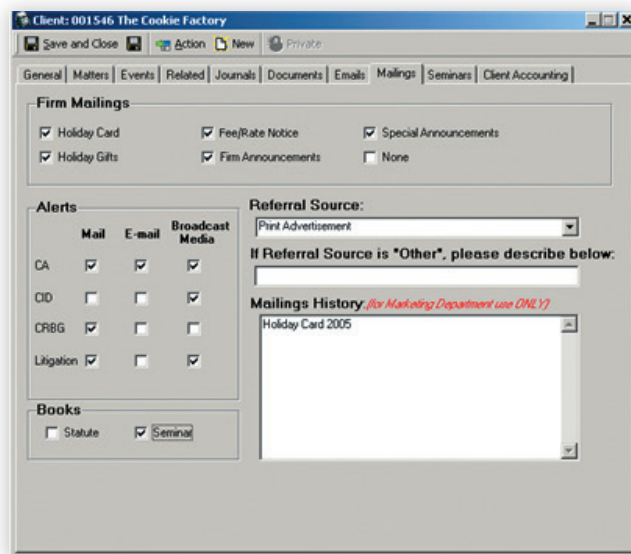


Better Manage Marketing Efforts

Orion improves client communications, referral source tracking and analysis while simplifying seminar invitations and storing historical marketing efforts, all designed to fuel individual practice group and overall firm growth. Orion dramatically decreases marketing management efforts by providing a centralized contact database, the ability to design and modify custom data views, reports and merge documents for mass document assembly.

Key Benefits

- Centralized Contact Database and Orion's Exchange Sync Application
- Customizable Data Views, Reports and Merge Forms
- Fully-Integrated with Financial Management Data



Orion Practice Management streamlines business development activities. Leverage Client Relationships and referrals to fuel firm growth. Client Communications, newsletters and industry materials are easily produced and tracked.