

## Leveraging the Power of Microsoft Office in the Law Firm



CoreRelate provides a centralized source of matter information conveniently available from a toolbar in Outlook or Word. This includes everything that is relevant to the matter – appointment dates and task deadlines, staff assignments, shared notes, linked documents and websites, contacts and relationships, and details from unlimited customized data fields.

CoreRelate is an SQL database, seamlessly integrated with Microsoft Office, and matter centric. It is very versatile and can be highly customized to meet the needs of any practice group or firm.

The CoreRelate toolbar takes full advantage of the relational quality of the SQL database, providing a variety of ways to access and organize the database information. The *My Data* button automatically displays information connected to the individual user. For reporting purposes, built-in and customizable views organize data by client, by user, by date, by contact, by court.

### Integration with BEC's Docket Enterprise, LegalBar and Microsoft Office Applications

While comprehensive and powerful on its own, CoreRelate is also the database for BEC Docket Enterprise™ and BEC LegalBar®. Docket Enterprise is used for docketing, group scheduling, and task management. LegalBar uses CoreRelate data for document assembly and mail list management.

And since all BEC software applications are fully integrated with the Microsoft Office Suite, the integration of the three provides an efficient way to share matter information, produce documents and track dates in the familiar environments of Outlook and Word.

### What's Next?

Contact BEC Legal Systems to arrange an online demonstration.

800.948.4810  
www.beclegal.com



### Customizable Matter Centric SQL Database for BEC Legal Suite and Microsoft Office Applications

#### Matter Information Management

- Import matters from other database platforms (i.e., delimited data files, Juris, Hummingbird, Interwoven, etc.)
- Multiple matters per client tracking
- Case notes
- Unlimited user defined fields
- Responsible person assignments
- Detailed audit trails of scheduled activities and tasks
- Integration with WorkSite (Autonomy) – access documents saved in matter workspace

#### Matter-Contact Relationship Management

- Track contact relationships at Client, Matter, Court and User levels
- Track courts and judges in database
- Unlimited user defined fields for Contacts

#### SQL Database Features

- Software Developers Kit - open framework allows in-house developers to optimize using SDK kit