CLAIMS

1. A method for providing a practice area option comprising:

providing, by a computing device, an administrator interface that includes a practice area option to create a custom practice area grouping, the custom practice area grouping for assigning a client account, the client account relating to a practice area;

providing, by the computing device, an intake form option in the administrator interface, the intake form option comprising a plurality of information sets, the intake form option for selecting a preferred information set to be included in a new intake form, the preferred information set comprising a plurality of data fields, wherein the intake form option includes an option to utilize at least a portion of an existing intake form into the new intake form;

providing, by the computing device, an option to include the new intake form into the custom practice area grouping;

in response to receiving an indication to include the new intake form into the custom practice area grouping, including, by the computing device, the intake form into the custom practice area grouping;

providing, by the computing device, a user interface for assigning a new client account to the custom practice area grouping, the user interface comprising the plurality of data fields, the plurality of data fields configured for receiving user input that is specific to the new client account; and

in response to receiving information for at least one of the plurality of data fields, saving, by the computing device, the new client account.

2. The method of claim 1, further comprising providing a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict.

3. The method of claim 2, further comprising providing a conflict of interest interface for providing a conflict status for a plurality of different client accounts.

4. The method of claim 1, further comprising providing a default practice area grouping that comprises a default intake form.

5. The method of claim 1, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

6. The method of claim 1, further comprising providing a global search function for searching any of a plurality of criteria related to the custom practice area grouping.

7. A system for providing a practice area option comprising:

a processor; and

a memory component that stores logic that, when executed by the processor, causes the system to perform at least the following:

provide an administrator interface that includes a practice area option to create a custom practice area grouping, the custom practice area grouping for assigning a client account, the client account relating to a practice area;

an intake form option comprising a plurality of information sets, the intake form option for selecting a preferred information set to be included in a new intake form, the preferred information set comprising a plurality of data fields for including into the new intake form;

receive a selection of the preferred information set from the plurality of information sets for including the plurality of data fields in the practice area grouping;

provide a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict; and

in response to determining the potential conflict, send an alert to a client manager.

8. The system of claim 7, wherein the logic further causes the system to provide an conflict of interest interface for providing a conflict status for a plurality of different client accounts for a plurality of different users.

9. The system of claim 8, wherein the conflict of interest interface includes a conflict of interest search function to access a saved conflict of interest search.

10. The system of claim 7, wherein the logic further causes the system to provide a default practice area grouping that comprises a default intake form.

11. The system of claim 7, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

12. The system of claim 7, wherein the logic further causes the system to provide a global search function for searching any of a plurality of criteria related to the custom practice area grouping.

13. A system for providing a practice area option comprising:

a memory component that stores logic that, when executed by a computing device, causes the computing device to perform at least the following:

provide a user interface for assigning a new client account to a practice area grouping, the practice area grouping being created by an administrator by selecting at least one of a plurality of information sets that are provided in an intake form option, each of the plurality of information sets comprising a plurality of data fields, wherein the practice area grouping is further created in response to a selection by the administrator of at least a portion of at least one previously created intake form for including into the practice area option;

provide a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict; and

in response to determining the potential conflict, send an alert to a user.

14. The system of claim 13, wherein the logic further causes the system to provide an engagement letter option for determining whether an engagement letter has been executed for the new client account.

15. The system of claim 13, wherein the logic further causes the system to provide a matter details option for providing additional information sets to the user, the additional information sets corresponding to the practice area grouping.

16. The system of claim 13, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

17. The system of claim 13, wherein the logic further causes the system to provide a global search function for searching any of a plurality of criteria related to the practice area grouping.

18. The method of claim 1, further comprising receiving an administrator selection of a plurality of information sets and at least a portion of the existing intake form for including in the new intake form.

19. The system of claim 7, wherein the logic further causes the processor to receive an administrator selection of a plurality of information sets and at least a portion of the existing intake form for including in the new intake form.

CLAIMS

1. A method for providing a practice area option comprising:

providing an administrator interface that includes a practice area option to create a custom practice area grouping, the custom practice area grouping for assigning a client account, the client account relating to a practice area;

providing an intake form option comprising a plurality of information sets, the intake form option for selecting a preferred information set to be included in an intake form, the preferred information set comprising a plurality of data fields;

providing an option to include the intake form into the custom practice area grouping;

in response to receiving an indication to include the intake form into the custom practice area grouping, including the intake form into the custom practice area grouping;

providing a user interface for assigning a new client account to the custom practice area grouping, the user interface comprising the plurality of data fields, the plurality of data fields configured for receiving user input that is specific to the new client account; and

in response to receiving information for at least one of the plurality of data fields, saving, by a computing device, the new client account.

2. The method of claim 1, further comprising providing a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict.

3. The method of claim 2, further comprising providing a conflict of interest interface for providing a conflict status for a plurality of different client accounts.

4. The method of claim 1, further comprising providing a default practice area grouping that comprises a default intake form.

5. The method of claim 1, wherein the intake form option further comprises a default option to utilize an existing intake form as a template for the intake form.

6. The method of claim 1, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

7. The method of claim 1, further comprising providing a global search function for searching any of a plurality of criteria related to the custom practice area grouping.

8. A system for providing a practice area option comprising:

a memory component that stores logic that, when executed by the system, causes the system to perform at least the following:

provide an administrator interface that includes a practice area option to create a custom practice area grouping, the custom practice area grouping for assigning a client account, the client account relating to a practice area;

an intake form option comprising a plurality of information sets, the intake form option for selecting a preferred information set to be included in an intake form, the preferred information set comprising a plurality of data fields;

receive a selection of the preferred information set from the plurality of information sets for including the plurality of data fields in the practice area grouping;

provide a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict; and

in response to determining the potential conflict, send an alert to a client manager.

9. The system of claim 8, wherein the logic further causes the system to provide an conflict of interest interface for providing a conflict status for a plurality of different client accounts for a plurality of different users.

10. The system of claim 9, wherein the conflict of interest interface includes a conflict of interest search function to access a saved conflict of interest search.

11. The system of claim 8, wherein the logic further causes the system to provide a default practice area grouping that comprises a default intake form.

12. The system of claim 8, wherein the intake form option further comprises a default option to utilize an existing intake form as a template for the intake form.

13. The system of claim 8, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

14. The system of claim 8, wherein the logic further causes the system to provide a global search function for searching any of a plurality of criteria related to the custom practice area grouping.

15. A system for providing a practice area option comprising:

a memory component that stores logic that, when executed by a computing device, causes the computing device to perform at least the following:

provide a user interface for assigning a new client account to a practice area grouping, the practice area grouping being created by an administrator through the use of a plurality of information sets that are grouped as an intake form, each of the plurality of information sets comprising a plurality of data fields, the user interface

comprising the plurality of data fields for receiving user input that is specific to the new client account;

provide a conflict of interest option for comparing at least a portion of the information for at least one of the plurality of data fields against similar fields for a different client account to determine a potential conflict; and

in response to determining the potential conflict, send an alert to a user.

16. The system of claim 15, wherein the logic further causes the system to provide an engagement letter option for determining whether an engagement letter has been executed for the new client account.

17. The system of claim 15, wherein the logic further causes the system to provide a matter details option for providing additional information sets to the user, the additional information sets corresponding to the practice area grouping.

18. The system of claim 15, further comprising providing an intake form option for the user to select which previously created intake form to utilize of the new client account.

19. The system of claim 15, wherein the plurality of data fields comprises at least one of the following: a matter name field, a matter identifier field, a description field, a client field, a client goal field, a referral source field, a practice area field, an intake form field, a responsible professional field, a jurisdiction field, an owner field, a team field, and an attached records field.

20. The system of claim 15, wherein the logic further causes the system to provide a global search function for searching any of a plurality of criteria related to the practice area grouping.