

You Know You Need SmartAdvocate The Only Question is Which Version?

Features	SmartAdvocate Server	SmartAdvocate Cloud Gold	SmartAdvocate Cloud Silver
Comprehensive User Home Screen	√	√	√
Case Summary Screen	√	√	√
Accessible from any location	√	√	√
Free iPhone / iPad app included ¹	√	√	√
Ability to keep unlimited number of case tabs open at once	√	√	√
Multiple staff members have simultaneous case file access	√	√	√
Migrate old case data from other systems ²	√	√	√
Email syncs with Outlook	√	√	√
Pre-loaded and customizable email, note and text message templates	√	√	√
Customizable case types and case statuses	√	√	√
Over a dozen available software integrations ²	√	√	√
Easy and Powerful Document Template Creation with hundreds of customizable merge codes	√	√	√ ³
Document generation with fillable pdf files	√	√	√
Case Browse Tool to Find Cases Fast & Easy	√	√	√
Automated conflict of interest search tool	√	√	√
Automatic Case Timeline	√	√	√
Powerful Office & Case Calendars that sync with Outlook	√	√	√
Categorized and Searchable Notes & Quick Notes	√	√	√
Dozens of Reports & Dashboards for deep data access	√	√	√ ⁴
Automatically send reports to users on pre-set schedules	√	√	√
Critical Comments, Critical Deadlines and automatically calculated SOLs	√	√	√
Quick access to recently viewed case files	√	√	√
Dedicated Litigation Screens	√	√	√
Detailed Lien Tracking	√	√	√
New Case Intake Wizards for quick file setup	√	√	√
Email Reports, Documents, Photos from within SA	√	√	√
Save & Email Notes with 1 Click	√	√	√
1 Click Telephone Message Reminders	√	√	√
Integrated Barcode Generator for automated case assignment of incoming documents	√	Coming soon	
Ability to Integrate Importing of New Intakes from Web, Chat or Phone Service ⁵	√	√	
Fully Integrated Text/SMS Messaging ⁶	√	√	
Virtually Unlimited User Definable Fields	√	√	
Workflow Module with automated task assignment	√	√	
Project Details Knowledge Base	√	√	
Medical Records Retrieval Module	√	√	
Powerful Case Referral Module	√	√	
Mass Mailing, Emailing & Text Messaging	√	√	
Mass Update/Changes Tool	√	√	
Phone System Integration for Instant Case Identification ⁵	√		
QuickBooks Professional Integration (Desktop Version)	√		
QuickBooks Online Version Integration (coming soon)	√	√	

¹ Configuration charges apply

² Separate charges apply

³ SmartAdvocate Cloud Silver will have a limited number of pre-formatted document templates.

⁴ SmartAdvocate Cloud Silver will have a limited number of pre-formatted reports.

⁵ Based on clients underlying technology. Each integration requires small fee for integration.

⁶ Requires separate service agreement with SMS provider. SMS messages currently cost \$0.02 per message – subject to change. Outgoing & responding text messages are automatically filed in the respective case.