

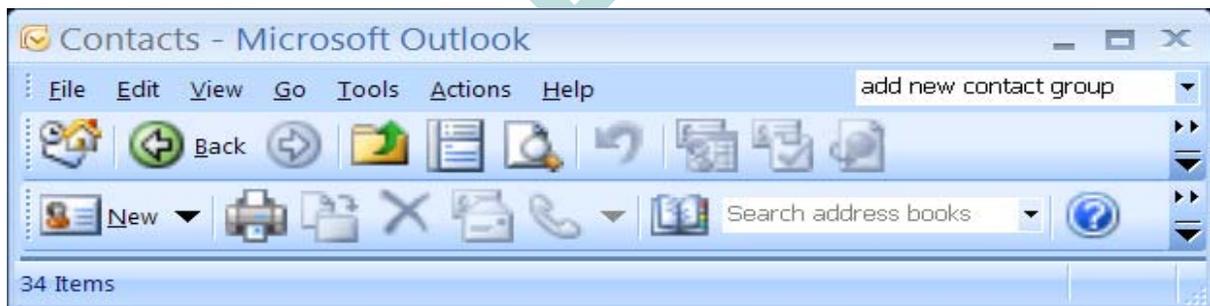
INSTRUCTIONS FOR SETTING UP A CONFLICT SYSTEM IN OUTLOOK 2007

INTRODUCTION

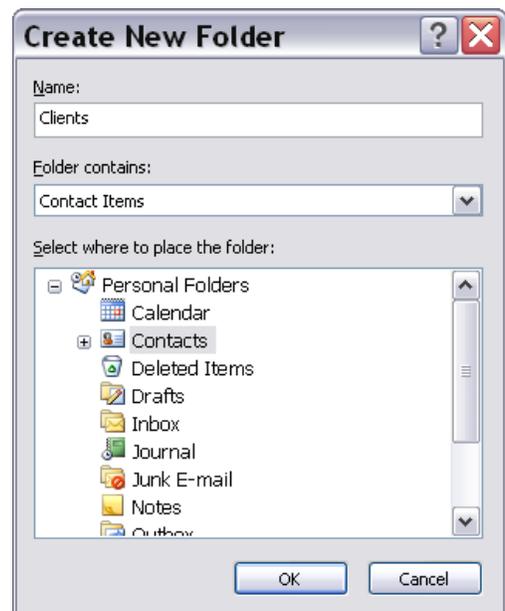
Sole practitioners or small firms can track conflicts in Outlook 2007 using the Contacts feature of this program. Each client/matter is set up as a separate contact card with conflict names entered in the Notes field of the contact form. The Notes field and other fields on the contact card can then be searched for names which may pose a conflict.

HOW TO SET UP A BASIC CONFLICT SYSTEM IN OUTLOOK 2007

1. To set up a conflict system in Outlook 2007, begin by creating a new folder in Contacts to contain client information. Launch Outlook. Click the **Contacts** button in the **Navigation Pane** on the left side of the screen. If the **Contacts** button is not visible, go to the bottom of the **Navigation Pane**, click **Configure Buttons** , and choose **Show More Buttons**. You may need to choose **Show More Buttons** several times to make Contacts visible.
2. Once you are in Contacts, click on the **New** button in the **Advanced Toolbar**



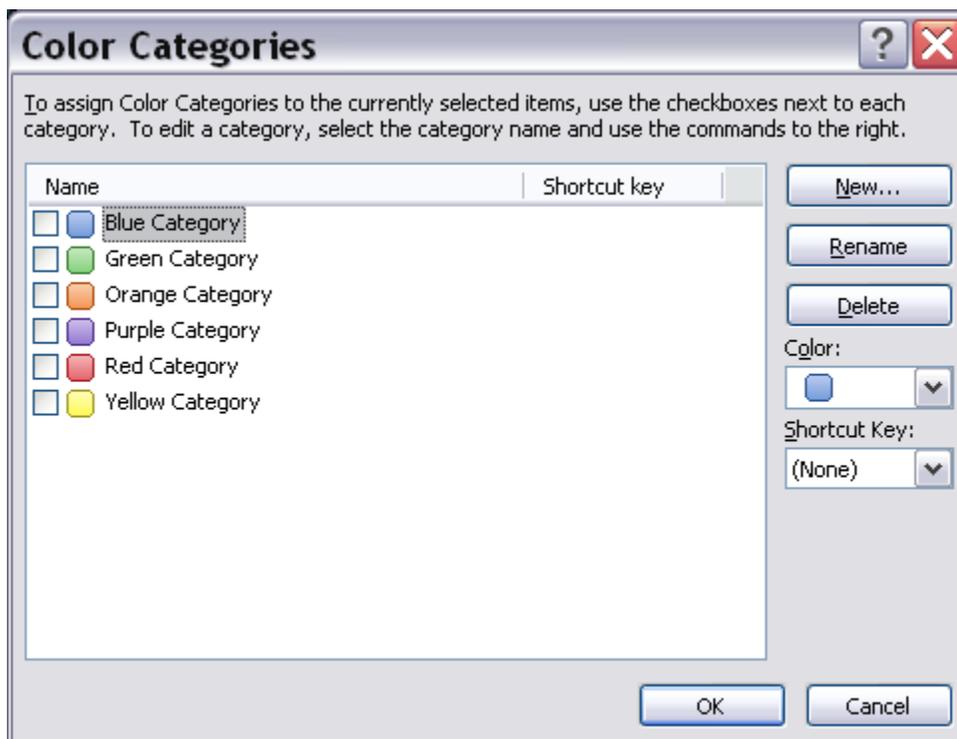
3. and choose **Folder...**
In the **Name:** box, type Clients. Click OK.



4. Before entering your first contact, it is recommended that you set up the appropriate categories for your conflict system. Click the **Categorize** button on the Advanced toolbar:



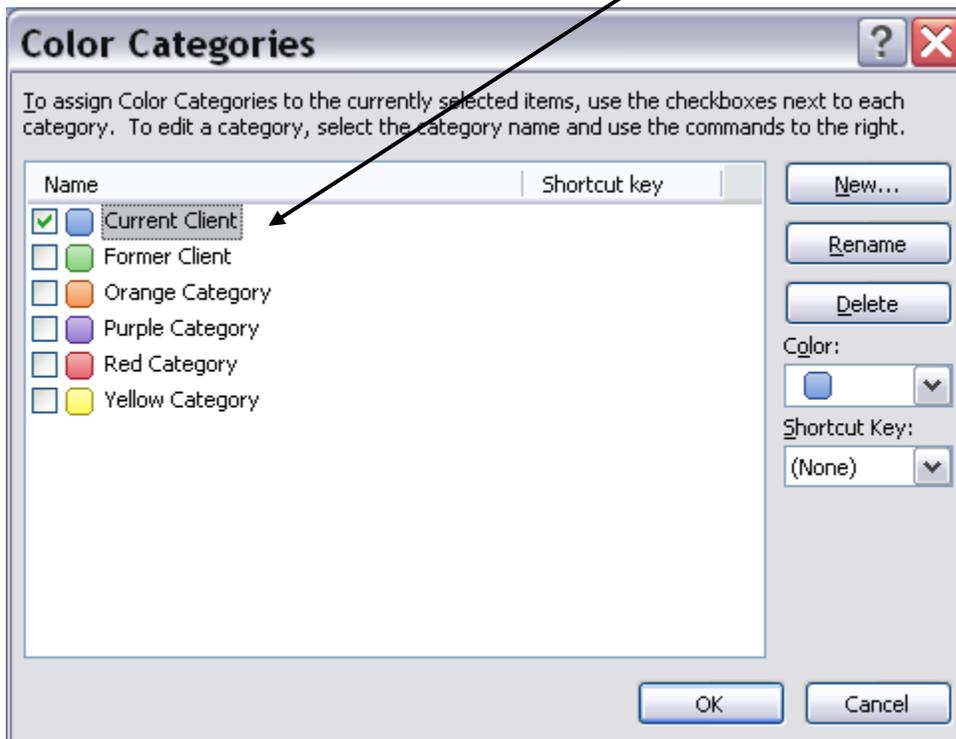
Choose **All Categories...** The Color Categories box will appear:



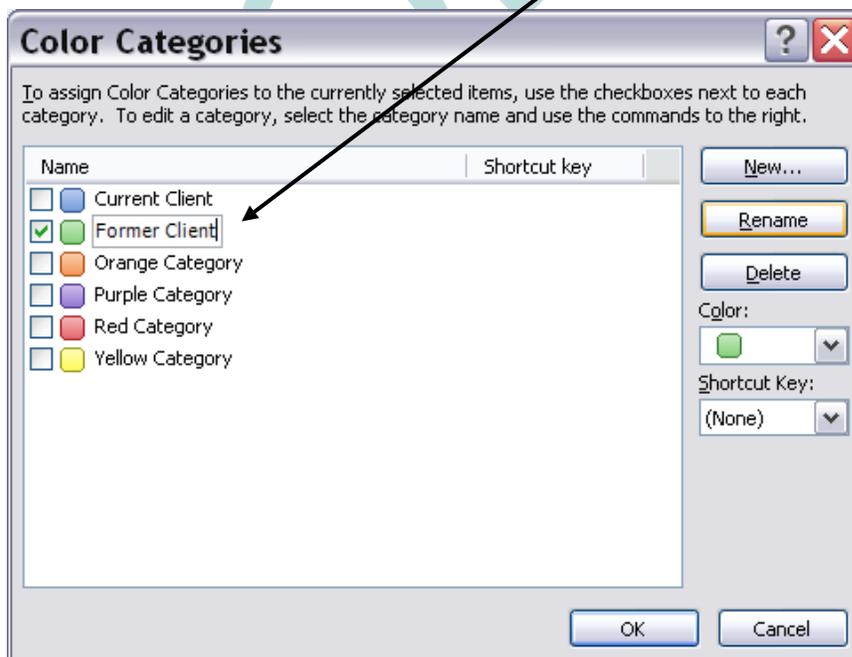
All categories in Outlook 2007 have a color association. By default, Outlook offers six colors: Blue, Green, Orange, Purple, Red, and Yellow. (More are available by clicking the **Color** pull-down menu on the right side of the Color Categories screen.)

The colors in Outlook can be “renamed,” i.e., assigned a name, by clicking in the box next to the color and clicking **Rename**. The PLF suggests you add Current Client and Former Client as two new categories to assist you in tracking conflicts in Outlook 2007. **NOTE:** As an alternative, you can also create two client folders during steps 1-3 above: Current Clients and Former Clients. If you follow this approach, the Current and Former Client categories are not necessary. Setting up separate Current and Former Client folders will affect how you search however. See step 3 in [SEARCHING FOR CONFLICTS IN OUTLOOK 2007](#) below.

5. Set up the category “Current Client” and associate it with the color Blue. Click in the box next to “Blue Category,” click on **Rename**, type the words “Current Client,” and click OK.

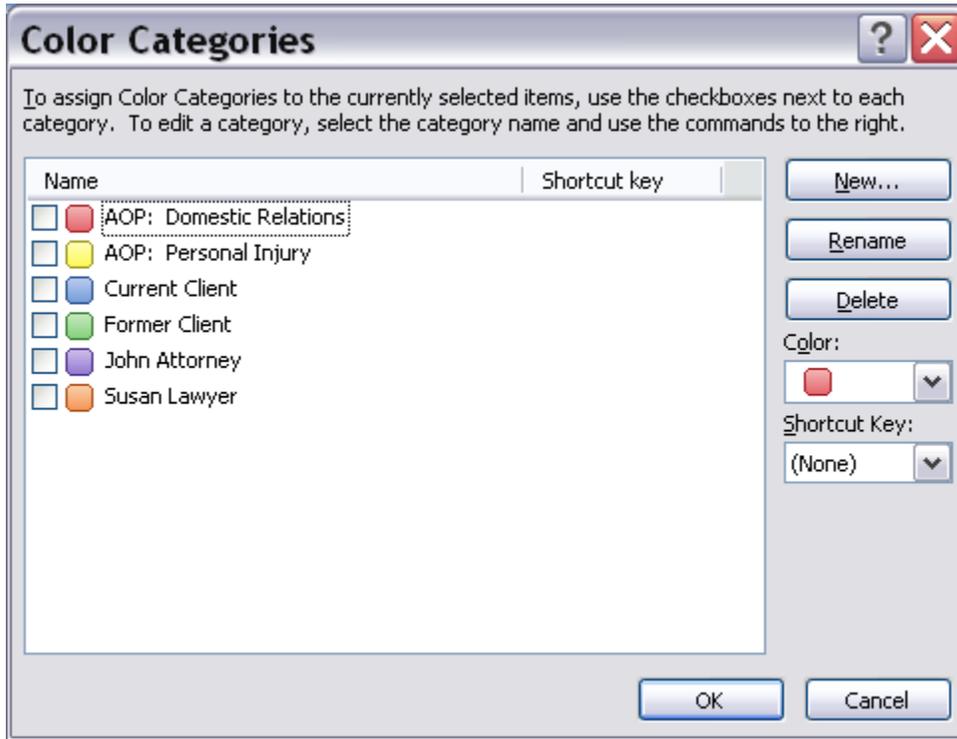


6. Add the category “Former Client” and associate it with the color Green. Click in the box next to “Green Category,” click on **Rename**, type the words “Former Client,” and click OK.



7. You may also wish to add your practice areas and the names or initials of all the lawyers in the firm.

For example, if Susan Lawyer and John Attorney had a Domestic Relations and Personal Injury practice, their category list might look like this:

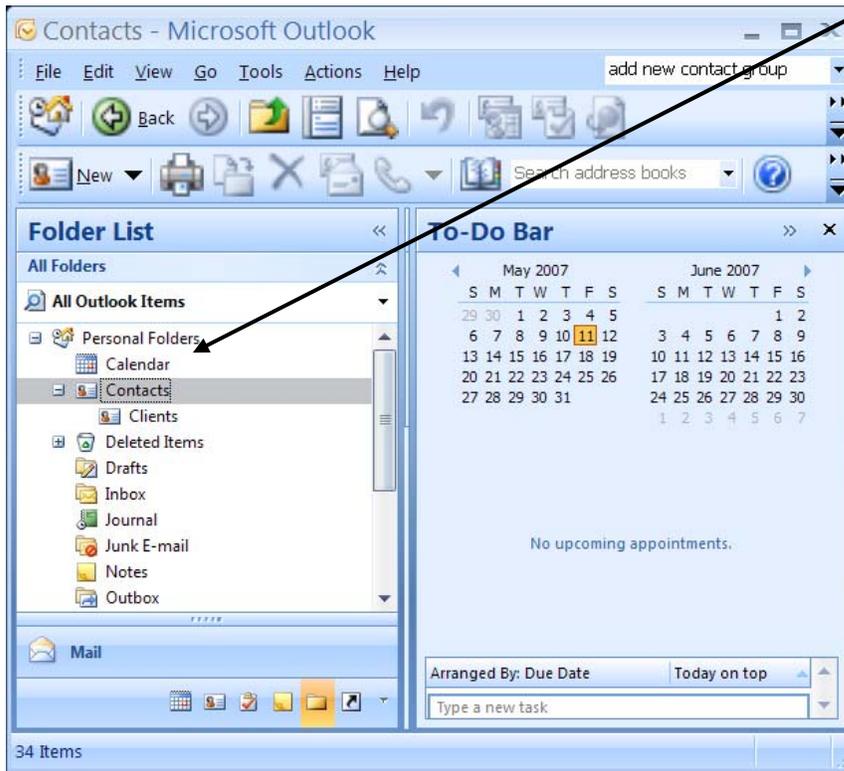


Outlook alphabetizes categories by name. Using the acronym AOP for Area of Practice helps keep Area of Practice categories grouped together. Current Client, Former Client, and the names of the attorneys follow in alphabetical order. You may need to experiment with different naming strategies for categories if you want to keep the category list sorted in a particular way.

Now that your category list is set up, you are ready to begin entering client information into Outlook 2007.

8. Navigate to your Clients folder by using the **Folder List** or the **Navigation Pane**. Document hosted at <http://www.jdsupra.com/post/documentViewer.aspx?fid=b25a46b6-7e43-4159-8a9e-1a271eefe39b>

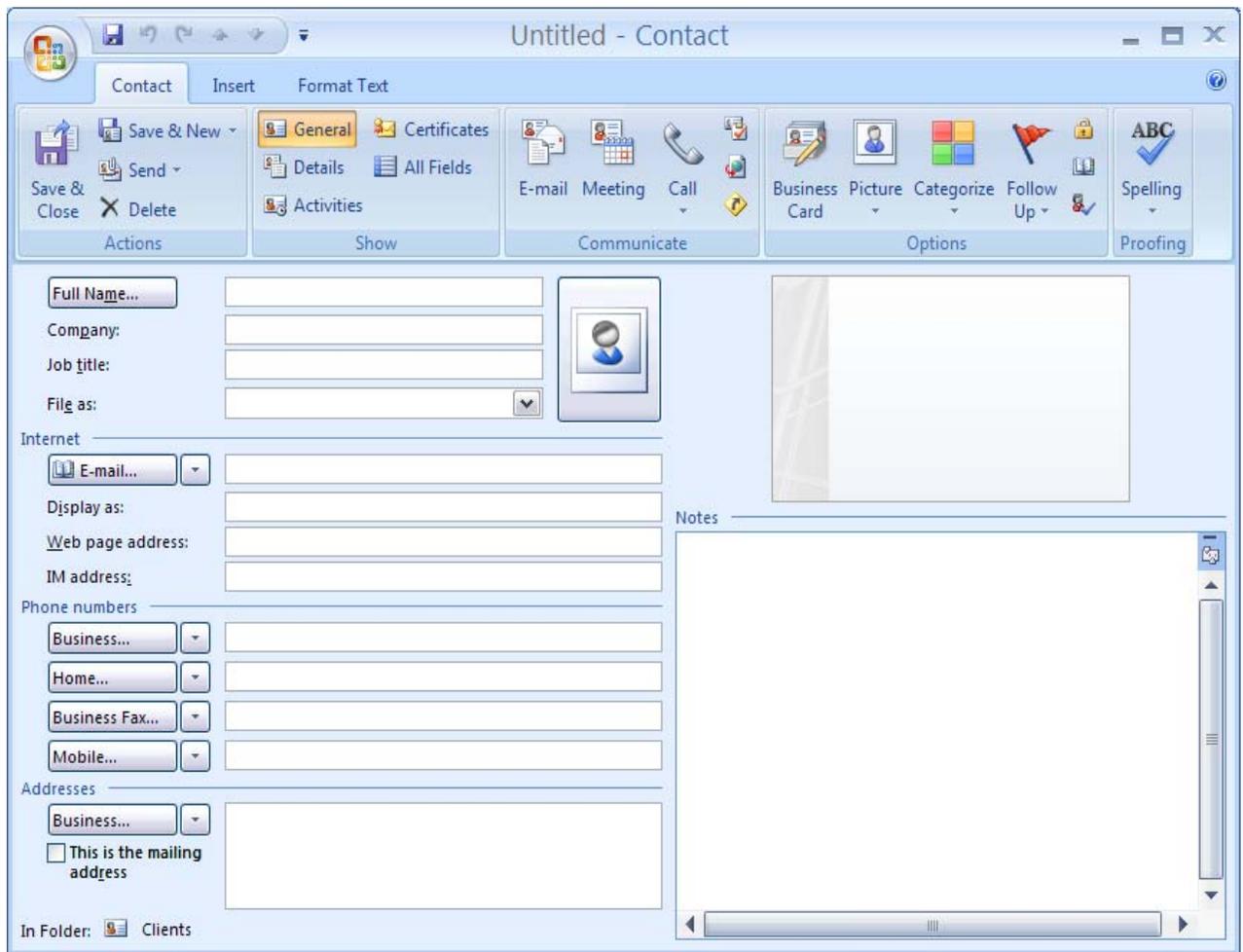
To use the **Folder List**, select **Go, Folder List**. Click on the + sign in front of Contacts to make your Clients folder visible.



To use the **Navigation Pane**, click on the Contacts button:



9. Next, click on the Clients icon. To create a new blank contact, Click on **File, New, Contact** or use the keyboard shortcut <Ctrl> N. http://www.idsupra.com/post/documentViewer.aspx?fid=b25a46b6-7e43-4159-8a9e-1a271eefe39b
10. A blank contact form will appear:

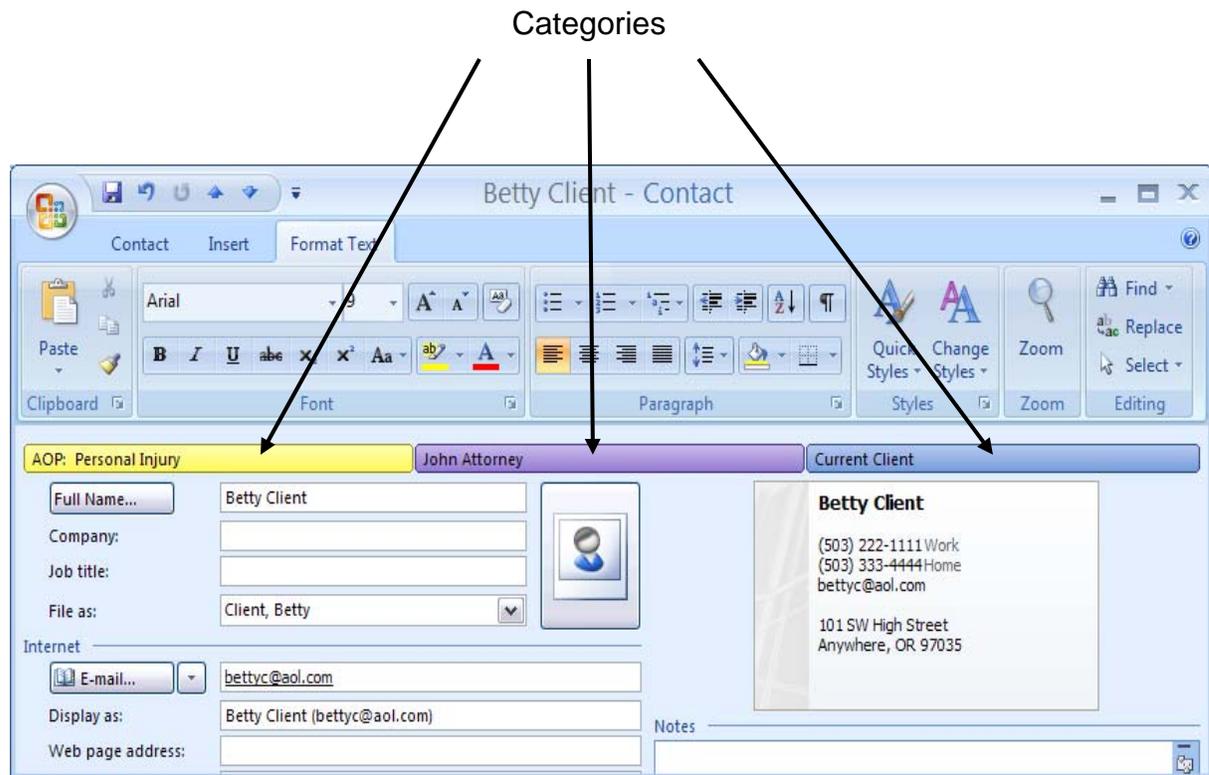


Begin entering name, address, phone, fax, email, and other details. Name information should be entered by clicking on the **Full Name ...** button. Address information should be entered by clicking on the **Business... or Home ...** button. Using these buttons ensures that information will be entered in the proper format. Note that Outlook allows multiple address, phone, fax, and e-mail entries.

If the client is a Company, enter the Company name in the **Company** field on the contact card rather than using the **Full Name** button which is meant to be used when entering information pertaining to individuals.

Create a separate contact card for each client or client matter.

11. Use the **Categorize** button and select the appropriate colors/categories to identify the responsible attorney, area of practice, and the client's status (current client or former client).



12. Enter conflict names in the Notes field (the large blank rectangle at the bottom right of the contact card). List each conflict name separately and indicate the relationship of the conflict name to the client. For example: ABC Corporation (adverse party); Sue Smith (adverse party); All Farm (insurer for ABC Corporation); Roy Jones (lay witness); Dr. Samantha Taylor (client's treating physician)

Other pertinent case information, such as file number, case description, date opened, date closed, etc. can also be included in the Notes field.

To save the contact information, click the **Save and Close** button.

Tip: Conflict searches in Outlook will not be reliable unless information is entered in the same format consistently. In the example above, we have suggested "Dr. Samantha Taylor" rather than "Samantha Taylor M.D." Either will work, but to ensure reliable search results, choose one format and stick with it or use a broader approach when searching. For example, to run a conflict search for Dr. Samantha Taylor, search for "Taylor" or "Samantha Taylor," rather than "Dr. Samantha Taylor" or "Samantha Taylor M.D."

Sample Contact Card:

Betty Client - Contact

Contact Insert Format Text

Save & New Save & Close Send Delete

General Certificates Details All Fields Activities

E-mail Meeting Call

Business Card Picture Categorize Follow Up

ABC Spelling

AOP: Personal Injury John Attorney Current Client

Full Name... Betty Client

Company:

Job title:

File as: Client, Betty

Internet

E-mail... bettyc@aol.com

Display as: Betty Client (bettyc@aol.com)

Web page address:

IM address:

Phone numbers

Business... (503) 222-1111

Home... (503) 333-4444

Business Fax...

Mobile...

Addresses

Home... 101 SW High Street
Anywhere, OR 97035

This is the mailing address

In Folder: Client

Betty Client

(503) 222-1111 Work
(503) 333-4444 Home
bettyc@aol.com

101 SW High Street
Anywhere, OR 97035

Notes

Conflict Names:
ABC Corporation (adverse party)
Sue Smith (adverse party)
All Farm (insurer for ABC Corporation)
Roy Jones (lay witness)
Dr. Samantha Taylor (client's treating physician)

Case Number
07-100

File Opened
August 1, 2007

Description
Client was injured in a multi-car accident at the intersection of SW Main and Nowhere Streets in downtown Anywhere, Oregon. Date of Injury: 7-1-07. Client sustained neck and back injuries and has been off work since the accident occurred. Client was not on the job at the time of the accident.

13. When a current client becomes a former client, remember to change the client's category in Outlook. Open the contact, click on the **Categorize** button, choose **All Categories...** Click on Current Client to remove the checkbox in that category and click on Former Client to activate the former client category.

The screenshot shows the Outlook contact card for Betty Client. The ribbon at the top includes 'Contact', 'Insert', and 'Format Text'. The 'Categorize' button is highlighted in the ribbon. The contact card is divided into several sections: 'Former Client' (selected), 'AOP: Personal Injury', and 'John Attorney'. The main contact information includes: Full Name (Betty Client), Company (empty), Job title (empty), File as (Client, Betty), Internet (E-mail: bettyc@aol.com), and Phone numbers (Business: (503) 222-1111, Home: (503) 333-4444). The Address section shows 101 SW High Street, Anywhere, OR 97035. The Notes field contains the following text:

Conflict Names:
 ABC Corporation (adverse party)
 Sue Smith (adverse party)
 All Farm (insurer for ABC Corporation)
 Roy Jones (lay witness)
 Dr. Samantha Taylor (client's treating physician)

Case Number (As Open File): 07-100
 File Opened: August 1, 2007

Closed Case Number 08-209
 File Closed: November 15, 2008

Description
 Client was injured in a multi-car accident at the intersection of SW Main and Nowhere Streets in downtown Anywhere, Oregon. Date of Injury: 7-1-07. Client sustained neck and back injuries and has been off work since the accident occurred. Client was not on the job at the time of the accident. Case settled November 1, 2008.

It is also recommended that you enter the date the client's file was closed in the Notes field, along with the closed file number, if applicable. You may also wish to update the case description.

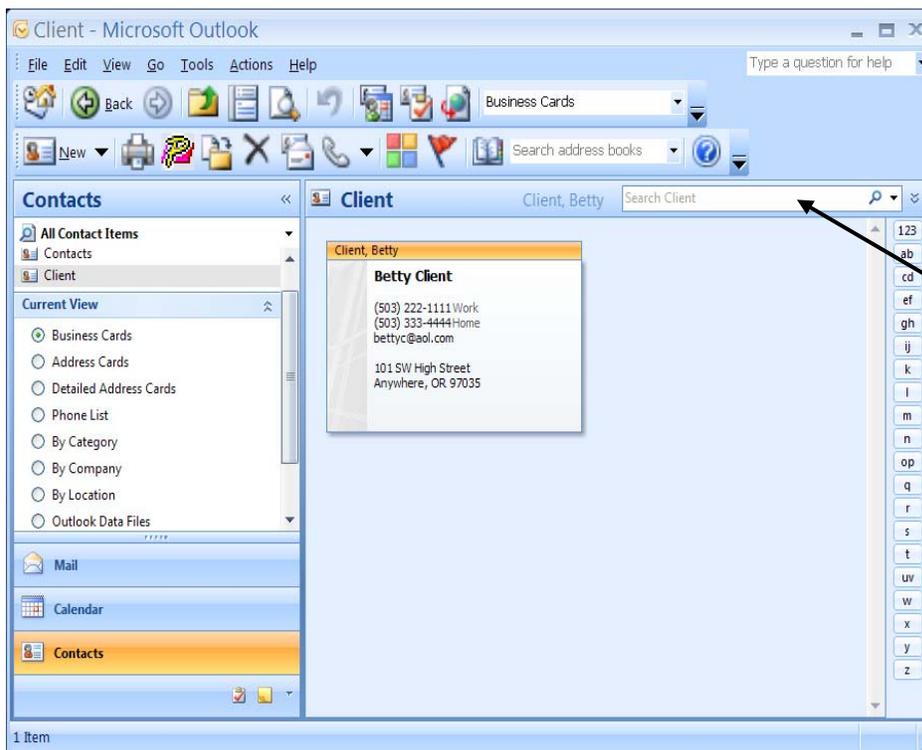
To save your changes, click the **Save and Close** button.

NOTE: If you set up separate Current and Former Client folders instead of using the Current and Former Client categories, just move the client's contact card from Current Clients to Former Clients by selecting it with your mouse and dragging it to the Former Clients folder.

INTRODUCTION

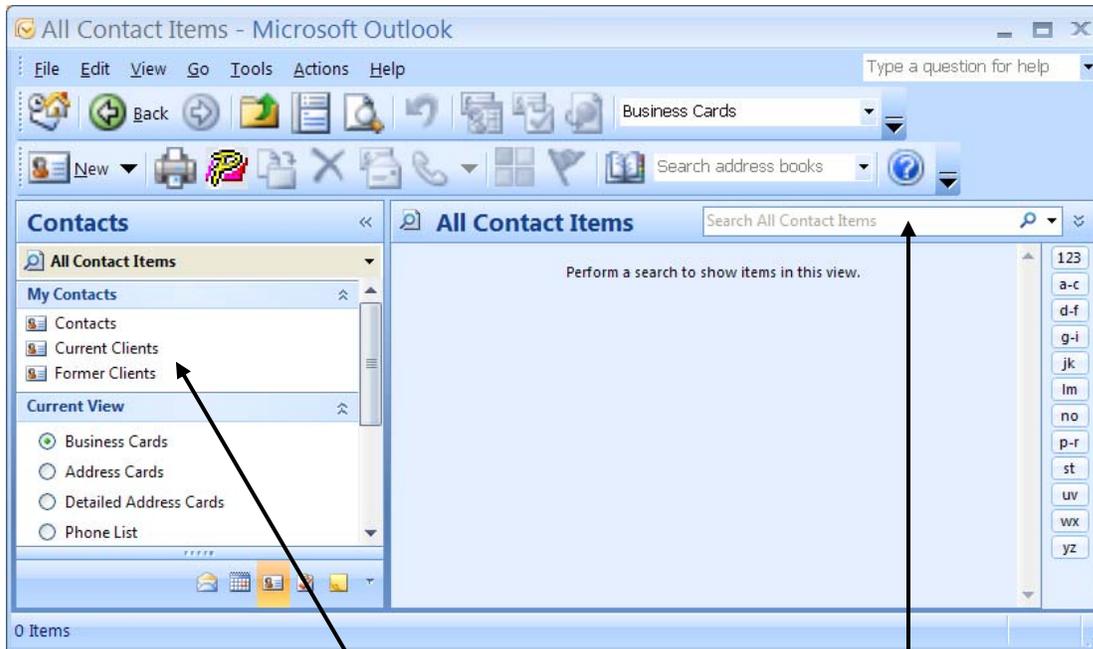
Windows Vista includes Windows Desktop Search and the **Instant Search** feature described below. If you are using Outlook 2007 on a computer that runs Vista, **Instant Search** is enabled automatically. If you are using Outlook 2007 on Windows XP, you may need to download **Instant Search** and/or take steps to enable this feature. Click on **Help** in Outlook for more information. Without **Instant Search**, you can still search for conflicts, but search performance and functionality is limited.

1. To search for conflicts in Outlook 2007, go to your Clients folder in Contacts. In the **Search Contacts** box, type the name or other information you are searching for:



2. If a match is found, Outlook will automatically display the card(s) which match the search term. Open each matching card and determine if a conflict exists. Document the results of your conflict search in the client file. Contact cards can be printed in a Memo Style for filing – choose **File, Page Setup, Memo Style**. To preview before printing, click the **Print Preview** button. If you prefer to print search results in a list format, see step 4 below.

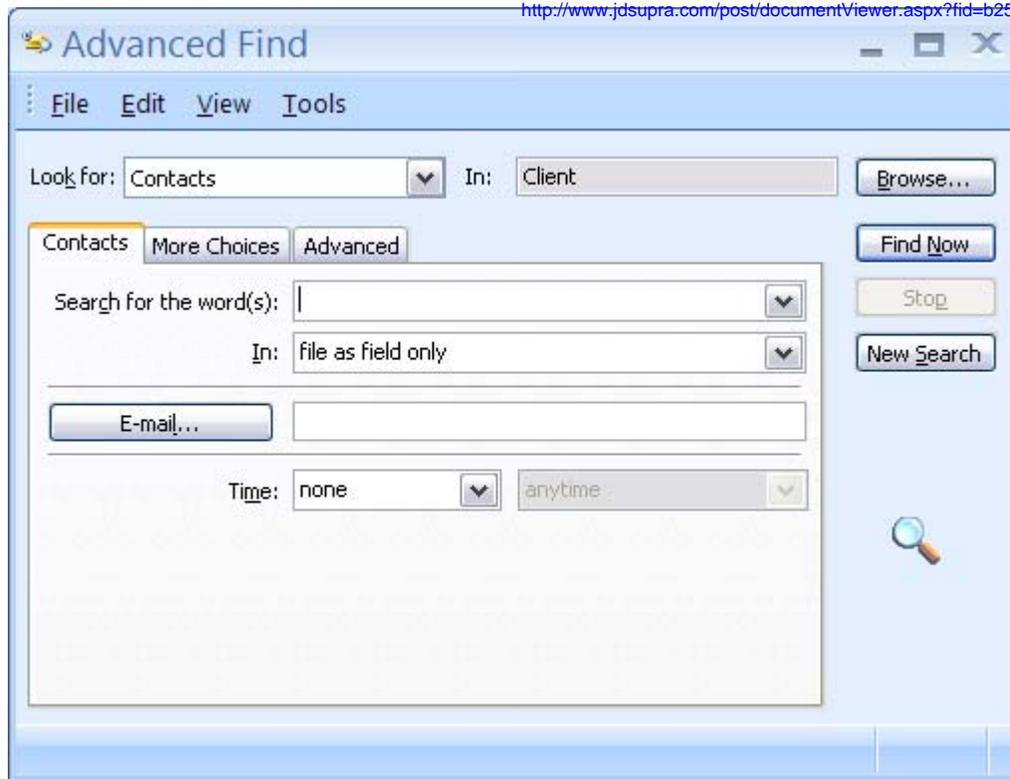
3. If you created separate Current and Former Client folders in lieu of using the Current and Former Client categories, make sure your **Search Contacts** box is set to **Search All Contact Items** before you run a conflict check. Otherwise, you will only be searching the currently selected folder. To search for All Contacts, click in the **Search Contacts** box, and choose **Search All Contact Items** from the pull-down menu:



Search All Contact Items when you have created multiple folders

The **Search Contacts** box has been set to **Search All Contact Items**

4. The steps described above work well for simple conflict searches which generate no results or just a few matching cards. If you find that conflict searches are generating multiple matching cards, or if you prefer to print a list of all search results on one page, use the **Advanced Find** feature. On the **Tools** menu, point to **Instant Search**, then click **Advanced Find**.



5. By default, Outlook 2007 searches only in the “file as” field. A search of the “file as” field will find only a company name or the last name and first name of an individual client. **To conduct a thorough conflict search, you must tell Outlook to look in “frequently-used text fields.”**

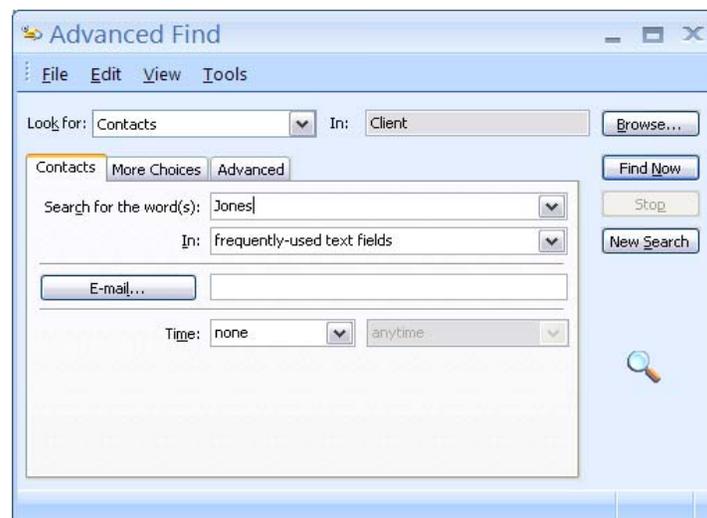
Change the setting in the drop-down box

In: file as field only

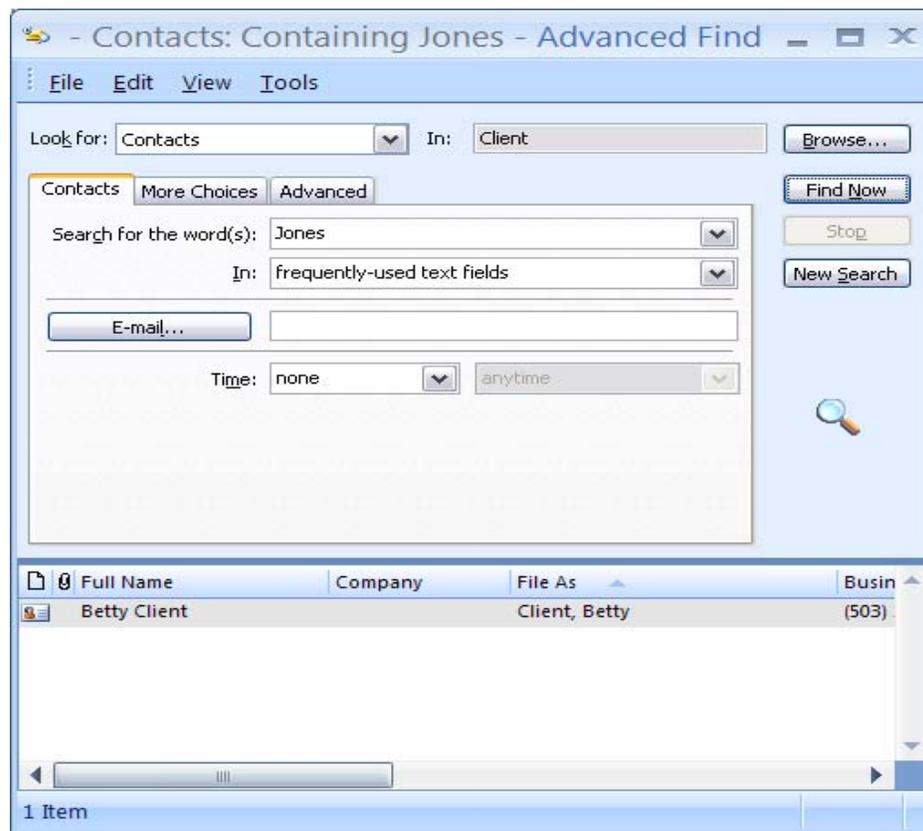
to:

In: frequently-used text fields

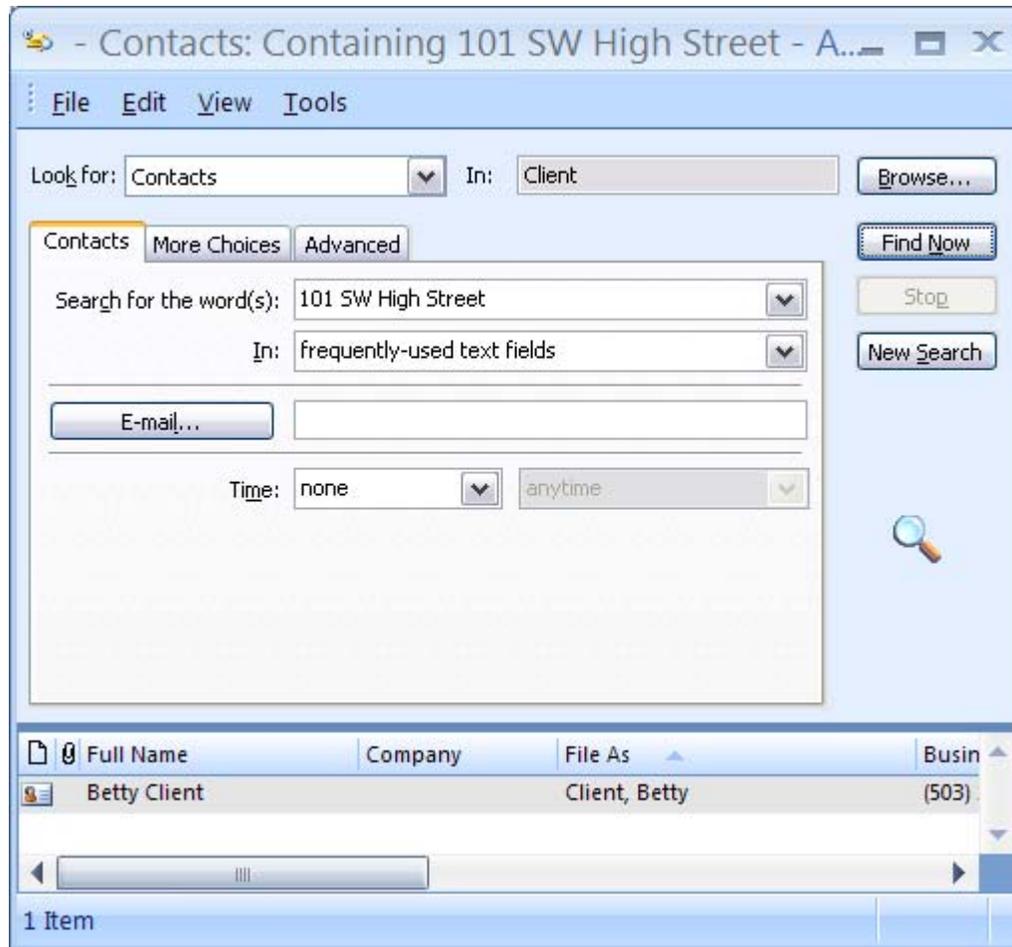
6. You are now ready to search your Clients contact folder for Conflicts. In the box **Search for the word(s):** type in the name you are searching for. In the example used earlier, Roy Jones was a lay witness in the Betty Client personal injury case against ABC Corporation and Sue Smith. A conflict search for the name Roy Jones would look like this:



7. To search, click the **Find Now** button. If Outlook finds a name, it will generate a list of contacts containing that name. In this case, the contact card for Betty Client comes up:



8. To determine where Roy Jones is mentioned in Betty Client's contact card, and what connection he has to her case, double-click on Betty's entry in the search list to view her card.
9. If a search finds multiple contact cards which include a given name, each contact card will need to be opened separately and evaluated for potential conflicts.
10. Avoid the pitfall of searching only for a full name when conducting a conflict check. If Samuel L. Smith is in your system as S. L. Smith, a search using his full name may not find the abbreviated entry with his initials. A quick search under the last name "Smith" is better because it generates broader results. Keep in mind that multiple searches for varying formats of a name may also be necessary, especially when looking for a corporate entity.
11. For those handling real property transactions, note that address fields can be searched as well. Follow the instructions above to search frequently-used text fields and type in the address in the **Search for the word(s):** box. For example, a search for the address 101 SW High Street would find Betty Client's contact card and would look like this:



12. You may also search by taxpayer identification number or social security number if that information is entered into the Notes field of your Outlook contact cards. Follow the search steps described above.
13. Remember to reset Outlook to search in Frequently-Used Text Fields each time you search. Every time you click the **Find** button to do a search, or if you clear your search results by clicking the **New Search** button, Outlook *reverts back to its default setting* and will only look in the "File as" field. You must change it to look in "frequently-used text fields" each time.
14. IF YOUR SEARCH FINDS NO MATCHING CARDS, then the conflict name you searched for is not in your system. You should document this result in the client's file.