



How to Set Up a Conflict System in Outlook

Using Outlook for conflict tracking may not be the most ideal solution, but for many lawyers starting out on a shoestring, it's a way to make do.

More likely than not, you already own the program. And as [Tom Peterson](#) used to say, "[Free is a very good price](#)" when you have little or no capital to launch your practice.

Here's How it Works

Create a new contact card in Outlook for every client/matter. Enter the client's name, address, and other contact information. Use the Notes field to enter:

- Conflict names and relationships
- File number (if used)
- Date file opened
- Description of case

When you close a matter, enter:

- Closed file number
- Date file closed
- Date of destruction (when destroyed)

The screenshot shows an Outlook contact card for 'Betty Clew'. 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)

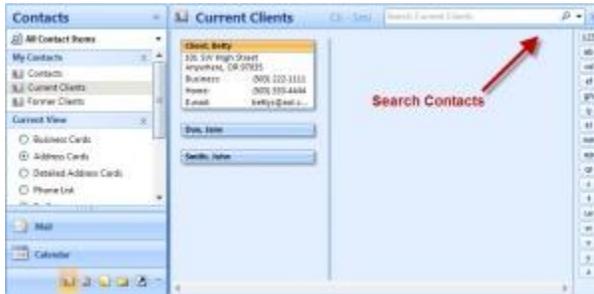
File Number: 07-100
File Opened: August 1, 2007

Description:
Client was injured in a multi-car accident at the intersection of 5th 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.

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

If you are a novice or favor simplicity, keep all clients – former and current – in one contact list. This allows for easy searching, which is the key to any conflict database. If you are more adept with Outlook, you can use categories to identify area of practice, responsible attorney in a multi-lawyer firm, and current/former client status. (Another option is to create separate contact lists for current and former clients.)

To search for conflicts in Outlook, navigate to the appropriate contact folder. In the **Search Contacts** box, enter the name you wish to search for:



Outlook will search through the first tab of every contact card in your list, including the Notes field. If a match is found, Outlook automatically displays the card(s) which match the search term.

To Learn More

There is more to learn about the process of using Outlook for conflict checking. [Click here](#) for complete instructions on how to set up a conflict system in Outlook 2007. If you are using an older version of Outlook, [contact me](#) and I'll be happy to send you directions for the version you are using. I also recommend downloading the [PLF's](#) Conflict of Interest Systems-Procedures. (Select Practice Aids and Forms, then Conflicts of Interest.) To become an Outlook 2007 power user, order the free DVD, "Microsoft Outlook 2007 Tips," on the [PLF Web site](#). (Select Programs on CD/DVD.)

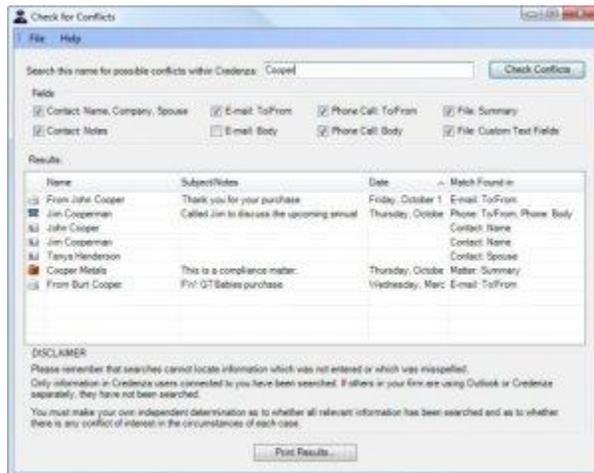
What is the Downside?

Although I'm an Outlook fan, I readily admit there are downsides to using Outlook for conflict tracking. First, it isn't the most elegant solution for lawyers who represent clients with multiple matters. Without enhancements, the program isn't designed to relate multiple cases or projects to a specific person. Secondly, Outlook doesn't readily produce a report to print and place in your file. There is a workaround of sorts for this issue, which I describe in [my instructions](#). (See the "Advanced Find" directions.) You can also use the Request for Conflict Search and System Entry, which is a form included in the Conflict of Interest Systems-Procedures posted on our [Web site](#). (Select Practice Aids and Forms, then Conflicts of Interest.)

What is the Upside?

If you own Outlook, have no money to spend on software, and aren't a computer geek, you can get by using Outlook for conflict tracking. It's user-friendly and doesn't require any special effort to get started. More significantly, it's quite forgiving: You can be completely inconsistent when entering conflict information in the Notes field and the search function in Outlook will still work. When you are able to move up to something more sophisticated, Outlook makes it easy to export data with the File Import/Export Wizard.

You can also enhance Outlook to make it operate more like practice management software. Practice management software is by far the best way to track conflicts and all the other information related to your clients and their files. Take a look at [Credenza](#), an Outlook Add-On available for \$9.95 per month. [Credenza](#) adds more functionality to Outlook, enabling you to relate multiple files and projects to one client. More importantly for this post, [Credenza can also run a conflict search and print search results](#):



Because it searches through contact cards, files, phone logs, **and e-mails**, the conflict check is more thorough.

A free trial of [Credenza](#) is available [here](#). [Read more about this program at the Mass LOMAP blog](#) maintained by my colleagues [Jared Correia](#) and [Rodney Dowell](#).

Practice Tip: Conflict data accumulates throughout your career as a lawyer. You must be able to search against an accurate list of former clients and related parties so long as you are engaged in the practice of law. If you are an associate, Assistant District Attorney, Public Defender, or providing legal services in some other capacity, keep your own conflict list. Do not rely on your employer to accurately track each file you work on.

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