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# **PRACTICE MANAGEMENT**

**BUYER'S GUIDE: 2022 EDITION**

# Practice Management Buyer's Guide: 2022 Edition

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## About

The Practice Management Buyer's Guide: 2022 Edition is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) [legaltechmg.com](http://legaltechmg.com).

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### Solution by Firm-Size

Small Firms: 1-25 Attorneys	Midsize Firms: 26-100 Attorneys	Large Firms: 101+ Attorneys
 ABACUSLAW <sup>®</sup>	 ABACUSLAW <sup>®</sup>	
 Clio <sup>®</sup>	 Clio <sup>®</sup>	 Clio <sup>®</sup>
 Filevine	 Filevine	 Filevine
 GET STAFFED UP		
 Lawmatics	 Lawmatics	
	 LITIFY	 LITIFY
 MOXO	 MOXO	 MOXO
 mycase		
 Needles Neos <sup>®</sup>	 Needles Neos <sup>®</sup>	 Needles Neos <sup>®</sup>
 PRACTICEPANTHER <sup>®</sup>	 PRACTICEPANTHER <sup>®</sup>	
 rocket matter	 rocket matter	
 SmartAdvocate <sup>®</sup>	 SmartAdvocate <sup>®</sup>	
 zolaSUITE <sup>®</sup>	 zolaSUITE <sup>®</sup>	

# Welcome to the 2022 Legal Tech Publishing Buyer's Guide Series



**Cathy Kenton**, CEO,  
Legal Tech Media Group/Legal Tech Publishing

The 2022 Legal Practice Management Buyer's Guide leads off this year's series. Since partnering with Above the Law last year, thousands of you have downloaded one or more Buyer's Guide and used them to help inform purchase decisions.

All of the companies featured in this volume are dedicated to helping lawyers and legal professionals deliver high-quality professional services to their clients

The Legal Practice Management Buyer's Guide is the centerpiece of Above the Law's Legal Tech Non-Event platform. In addition to the Guide, you'll also find the latest category content, a product directory, and the ATL Non-Eventcast podcast series that has already garnered more than 2,500 downloads.

A special 'Thank You' to the Legal Tech Publishing team of writers, editors, project managers, and graphic designers. Without them, this industry-leading review series wouldn't be possible.

Downloading the Buyer's Guide is just a start. Come back often for up-to-the-minute coverage of all things practice management and find answers to your questions.

To your success,



**Brian Dalton**, SVP, Breaking Media

**Cathy Kenton**,  
CEO, Legal Tech Media Group/  
Legal Tech Publishing and

**Brian Dalton**,  
SVP, Breaking Media

# Staffing Services



Beat the Great Resignation — Offshore  
Staffing for Lawyers, by Lawyers



# Beat the Great Resignation — Offshore Staffing for Lawyers, by Lawyers

“Get Staffed Up provides qualified staffers without the headaches of searching, screening, and oversight tasks. Get Staffed Up will provide well-screened and qualified staffers for law firms, ensuring a strong work ethic and attention to detail.”

**Company Name Brand**  
Get Staffed Up

**Product Name Brand**  
Get Staffed Up

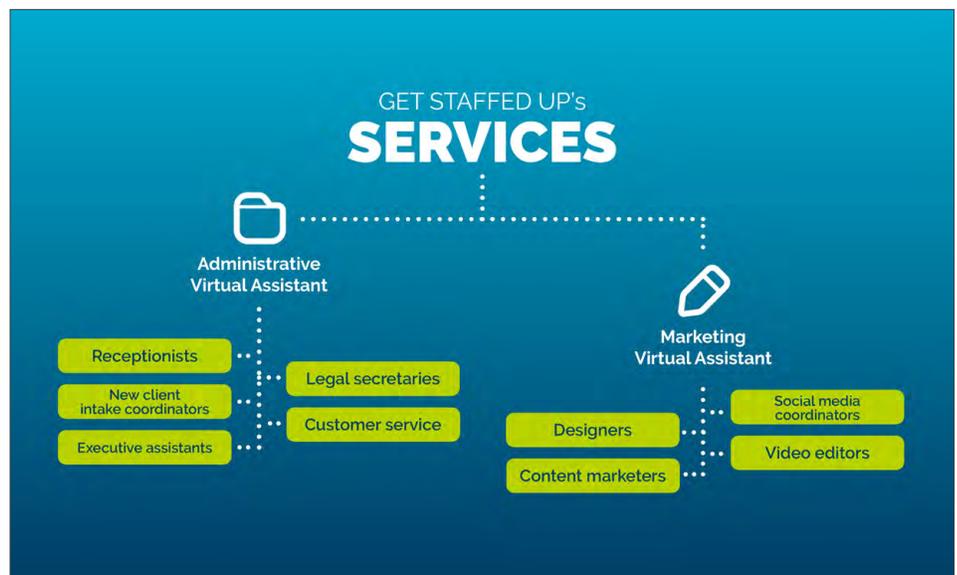
- Latest Developments and Updates**
- Attention to detail when finding the best fit for clients.
  - Great communication.

**Virtual Administrative or Marketing Assistants — aka “Staffers”**  
In the era of “The Great Resignation,” turnover at entry-level positions has never been higher, and finding administrative and marketing assistants can be a challenge. Get Staffed Up provides qualified staffers without the headaches of searching, screening, and oversight tasks. Get Staffed Up will provide well-screened

and qualified staffers for law firms, ensuring a strong work ethic and attention to detail. Providing exceptional candidates from around the globe, virtual assistants will work full-time and real-time, solely for one client. *See Figure 1.*

To maximize benefit and productivity, Get Staffed Up offers information attorneys can review to learn how a virtual assistant can be utilized: **12 tasks to delegate to your virtual assistant** and **7 delegation tips every attorney must know.**

Get Staffed Up virtual marketing assistants can provide social media management, including: blogs and newsletters; live chat management; booking/coordinating of speaking events; constant LinkedIn engagement; target market research; video editing; content design and



**Figure 1:** Get Staffed Up provides administrative and marketing assistants based on the needs of the client, freeing up attorneys and paralegals to focus on the business of law.

“ Once a candidate has passed the interview phase, they will begin paid training followed by skill assessments. Only then will a candidate be offered a contract with Get Staffed Up.”

management; CRM management; client surveys; client gift procurement; and special events and projects.

Get Staffed Up virtual administrative assistants connect via VoIP systems and can provide friendly phone answering, return calls at scheduled times, schedule appointments, and screen unwanted calls and distractions. Additional tasks can include: sorting and managing files; calendar management; special projects; CRM organization; sorting, managing, and responding to your email; potential new client intake and follow-up; helping to coordinate and schedule personal tasks; organizing lunches; booking appointments; and coordinating networking events and hearings.

A thorough evaluation and onboarding process helps ensure a strong match is made connecting the firm and staffer. See *Figure 2*.

**Getting to Know the Client**

Get Staffed Up schedules a decision-making call with each client, during which Get Staffed Up gets to know the client and gain insight into their needs. They gather as much information as possible, including previous experience and how much help is needed, while factoring in specific tasks and firm values, which are vital traits for a successful candidate. A specific job description is created and Get Staffed Up sets out to find the ideal individual. The

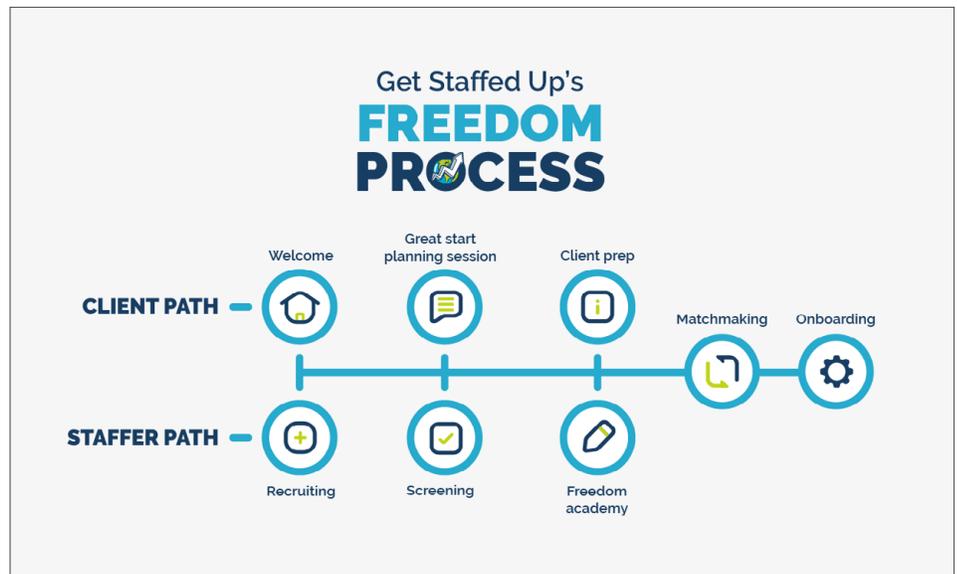
time to hire can be up to three weeks; however, Get Staffed Up can often deliver with a faster turnaround.

**Finding Qualified Talent**

Get Staffed Up has an in-depth process to find the top virtual assistants. They start by posting ads on the top job sites and social media platforms in Latin America and South Africa. Candidates are sent an application that identifies those with attention to detail and strong English comprehension via hidden tests. Get Staffed Up will then request materials from the applicant, including a video, formal resume, cover letter, essay, and an English test. These materials are reviewed, and if they meet Get Staffed Up’s high standards, an interview is scheduled. Once a candidate has passed the interview phase, they will begin paid training followed by skill assessments. Only then will a candidate be offered a contract with Get Staffed Up.

**Happiness is a Priority**

Get Staffed Up has a happiness department solely focused on the satisfaction of both clients and staffers. This client support service holds regular meetings with client and staff liaisons to ensure expectations are being exceeded. Additionally, Get Staffed Up offers helpful resources to enhance productivity, including [O190: The formula to maximum productivity](#) and [Taming the email monster](#). Clients and staffers can also [sign up for free webinars](#) from Get Staffed Up. See *Figure 3 on the next page*.



**Figure 2:** Freedom Process — Get Staffed Up has a defined process to find the ideal candidate for a law firm. Each step is well designed and executed to ensure happiness for both the client and staffer.

“ Get Staffed Up has a happiness department solely focused on the satisfaction of both clients and staffers. This client support service holds regular meetings with client and staff liaisons to ensure expectations are being exceeded.”

**Pricing**

Virtual assistants are available for \$1,850 to \$1,950 per month, and marketing assistants are available for \$2,050 per month. There is a one-time \$1,750 fee that covers the candidate selection and screening service. If the staffer is no longer the right fit for the firm at any time, Get Staffed Up will replace them at no additional cost to the firm.

**Who is Get Staffed Up?**

Get Staffed Up is a company created by lawyers, specifically for lawyers. The company's founders are based in Miami, Florida, with a remote core team of over 100 working overseas. They have over 450 virtual assistants working remotely for firms across the United States and Canada. The company is continuing to grow, adding more staffers every day.

**Why Use Get Staffed Up?**

- Avoid growing pains and ease the burden of overworked team members by bringing on a virtual team member to help shoulder the workload.
- Save time and money by adding overseas team members, providing diversity, and enriching the firm's culture.
- Native English speakers and bi-lingual virtual assistants available.
- Highest quality guaranteed. If a staffer doesn't work out, they will be replaced at no cost to the firm.

**Talk with Get Staffed Up Today**

[Get more information](#) to see how Get Staffed Up can help you.

FEATURES	GET STAFFED UP	OTHERS
Flat monthly fee	✓	
Operated by lawyers specifically to serve law firms	✓	
Split loyalty (part-time employees working for multiple firms)		✓
Lifetime replacement guarantee	✓	
Proprietary sourcing, screening and hiring process	✓	
No long-term commitment	✓	
90% client retention rate	✓	
More tasks delegated cost you more money		✓
Better alternative to answering service	✓	
Consulting services included	✓	
Technical support available at no extra cost	✓	
U.S.-based employees (high cost)		✓
Hired based on core values	✓	

**Figure 3:** Get Staffed Up provides vital services, including a proprietary hiring process, flat monthly fees, and a happiness guarantee.

# Practice Management Software



Leverage Customization and Flexibility to Improve and Automate Your Firm's Practice Management with AbacusLaw



Provide Best-in-Class Client Experience and Manage Matters and Financials from Anywhere, Anytime, with Clio



Filevine Organizes Matter Activity to Drive Improved Communication, Collaboration, and Results



Lawmatics Expands Legal Practice Management to Support the Entire Client Experience from Intake to Representation and Recurring Business



Litify Provides Powerful Task Automation, Flexible Matter Plans, and a Wealth of Integration Options, Built on Salesforce, to Improve Productivity and Efficiency



Modernizing Client Collaboration and Business Management



MyCase Lets You Do More of What Matters with All-in-One Law Practice Management Software for Small and Midsize Law Firms in All Practice Areas



Neos Can be Precisely Customized to Help Your Firm Improve Case Results While Increasing Efficiency and Profitability



All-in-One Legal Practice Management Platform PracticePanther Continues Growth While Maintaining Ease of Use for Managing Complex Matters



Rocket Matter delivers automated billing, business intelligence, granular security controls, and more to keep law firms secure and prosperous



Get Smart About Organizing and Automating Your Personal Injury and Mass Tort Cases Complete with Intake, Document Management, and Reporting Functionality



A to Z Practice Management that Covers Accounting, Matter, Email, Document, Task Management, and Reporting

# Leverage Customization and Flexibility to Improve and Automate Your Firm's Practice Management with AbacusLaw

“Once a matter is created, users navigate through the case via tabs: Litigation (case information), Notes, Linked Names (from contacts, cast of characters), Events, Documents, and Emails. Users can click on a Bill button throughout the application to quickly capture time.”

**Company Name Brand**  
AbacusNext

**Product Name Brand**  
AbacusLaw

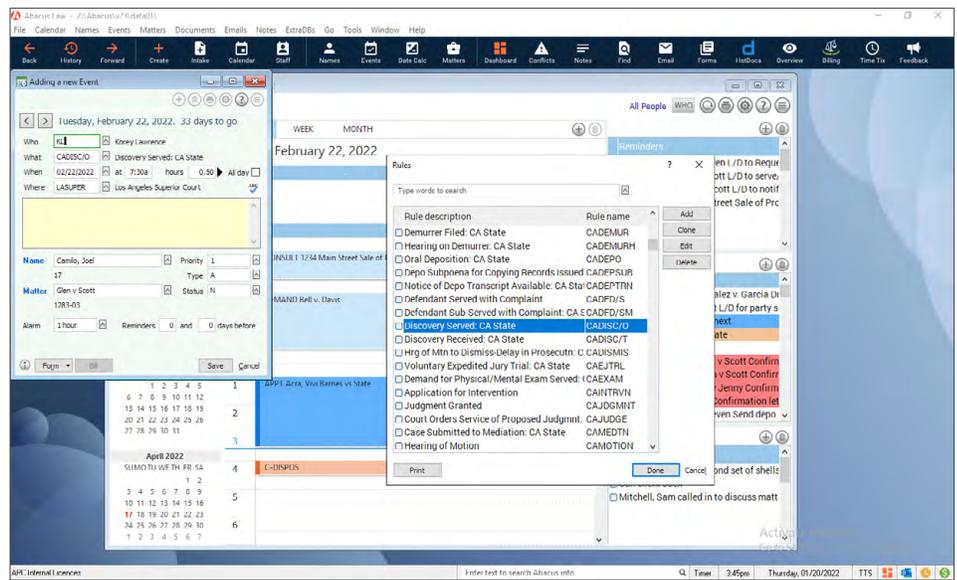
**Latest Developments and Updates**

- Role-based dashboard layouts deliver tailored displays of pertinent information selectable by a user's role.
- Abacus Payment Exchange (APX) enhancements include schedules, recurring charges, payment plans, and evergreen subscriptions.
- Pay Now button for convenient client payments from secure client portal or email inbox.
- User Interface (UI) updates with dark mode toolbar and refreshed desktop, dashboard, contact, and matter views.
- HotDocs integration for advanced document automation.

**End-to-End Matter Management**

AbacusLaw is a comprehensive practice management tool that provides a central location to manage day-to-day activities as well as the financial business of the firm. Host the system on-premises or securely in a private cloud. The platform is easily customizable for whatever a firm needs, including input screens, automation rules, documents, reports, and more. AbacusLaw integrates with O365, Salesforce, DocuSign, Nextiva, Case Status, APX, and Infusionsoft. AbacusLaw has a mobile app that works with both iOS and Android devices for users on the move.

The central function of AbacusLaw is matter management. A firm determines what information they need to manage each type of case, and a user can create a new matter in the system using the Intake icon. After assigning legal team members and case numbers, the case open date is logged, and



**Figure 1:** Automate calendar events using docketing court rules or designing rules that enforce firm workflows. Rules can trigger other calendar events, tasks, or document creation.

“A user can assemble complex documents like contracts, pleadings, or estate plans and pull client and matter information directly from AbacusLaw into HotDocs.”

a case code can be applied. You can automate the type of information collected based on the type of matter being created.

Once a matter is created, users navigate through the case via tabs: Litigation (case information), Notes, Linked Names (from contacts, cast of characters), Events, Documents, and Emails. Users can click on a Bill button throughout the application to quickly capture time.

The Notes tab is a place for team members to memorialize information on the case, similar to a familiar yellow notepad. However, unlike the yellow pad, these notes are available to the entire team.

Contacts within the platform are associated with matters, and firms can customize what information they want to collect for each contact, such as phone numbers, emails, and addresses. Additionally, contacts can be identified by their role in a matter, such as opposing counsel, client, judge, and expert. Each data point entered can then be used to filter or search for pertinent information.

### Calendar Tasks and Automation

The automation features of the calendar can save time and money. The application enforces rules-based calendaring, supporting firm-specific rules or [jurisdictional docketing rules](#). For example, by creating one event in the calendar, a firm can implement a designated workflow by triggering other calendar events, required tasks, alerts, reminders, or document creation. This can be useful across matter

type, practice area, or individual attorney workflow. See [Figure 1 on the previous page](#).

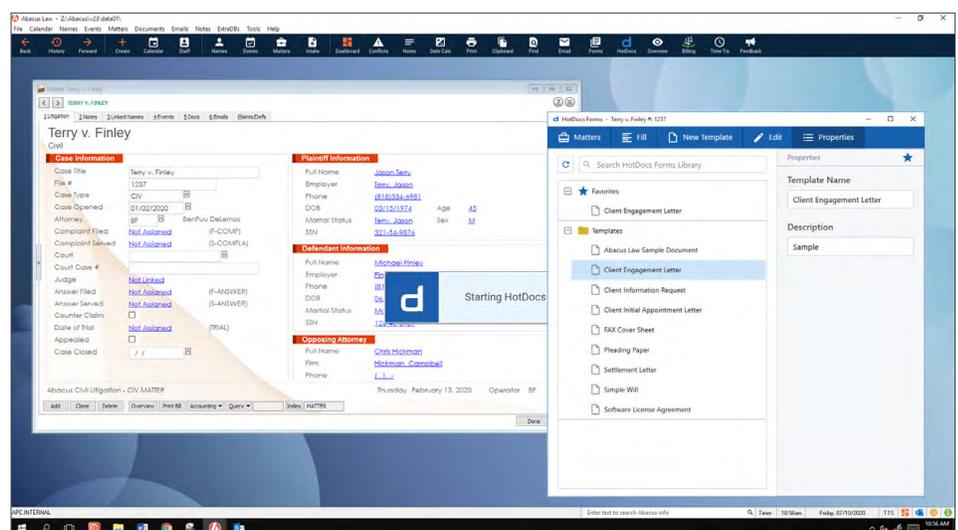
### Document Management

AbacusLaw comes with a complete document management system, including version control, access permissions, and security. Documents can be word processing files, images, spreadsheets, and other types—and are associated with a name or matter.

Users can automate mandatory court forms using the forms library, including fillable forms from different jurisdictions. A firm can also supplement the library and design its own forms. For more complex document assembly, [HotDocs is integrated directly into AbacusLaw](#). A user can assemble complex documents like contracts, pleadings, or estate plans and pull client and matter information directly from AbacusLaw into HotDocs. HotDocs offers interactive interviews that walk a user through the document assembly process. See [Figure 2](#).

### Dashboards and Reports

Dashboards give users a focused view of data, presenting apps and customizable charts based on role, practice area, or user preference, providing a set of tools for insight or action. Dashboards can automatically open when users log in to the application or by clicking the dashboard icon at the top of the screen. Users can work directly from their dashboard and add apps, including tasks and subtasks (can be sorted by date and priority order), events in the



**Figure 2:** The icons on the top of the screen make navigation within AbacusLaw easy. Users can click on any icon to go directly to key areas in the application: Intake, Calendar, Staff, Names, Events, Date Calc, Matters, Dashboards, Conflicts, Notes, Find, Email, Forms, HotDocs, Overview, Billing, and Time Tix.

“The application accommodates hourly, flat fee, or contingency billing, allowing users to set the billing frequency and preferred method of payment. You can customize each matter to set up minimum or maximum fee warnings, helping the legal team stay within budget.”

calendar, and even a subset of deadlines. Some of the charts displayed in a dashboard can include a recent matters list, billable time, and net income. Information captured using the quick notes feature on the dashboard can be stored, shared, saved, and converted to a billable record. See Figure 3.

Use the overview option to see a list of all activities at the client or case level, which is sortable and filterable by any field. Finding information within the system can be done via the global search feature accessible from most screens within the application. The search feature uses Boolean logic, and as words are typed, matches will appear in the results window. You can filter by names, events, matters, notes, linked documents, or emails simply by checking the appropriate boxes.

### Time, Billing, and Accounting

AbacusLaw recognizes that managing the financial side of a law firm can be cumbersome and complicated—and as a result, the platform includes a full accounting suite. The application accommodates hourly, flat fee, or contingency billing, allowing users to set the billing frequency and preferred method of payment. You can customize each matter to set up minimum or maximum fee warnings, helping the legal team stay within budget. A user can generate reports on specific matters, practice areas, or firm-wide results with just a few clicks. Further, [Abacus Payment Exchange \(APX\)](#) enables firms to accept credit cards and ACH payments and process them securely to trust and operating accounts.

### Pricing

AbacusLaw uses a simple subscription model, starting at \$69 per user per month.

### Who is AbacusNext?

AbacusNext is a vertical SaaS provider for compliance-focused professional services markets. Their purpose-built cloud infrastructure puts customers' business data and vital applications into a virtual workspace accessible anywhere, anytime, and from any device, enabling small and midsize legal and accounting firms to grow an efficient, secure, client-focused practice. More than 100,000 users worldwide benefit from a complete product portfolio, including practice management and case management solutions, tailored cloud options, document automation, and payment processing. To learn more, visit [abacusnext.com](http://abacusnext.com).

### Why Buy AbacusLaw?

- Complete law practice management (LPM) solution with tightly integrated front and back-office functionality.
- Powerful and personalized LPM for any size firm and any practice area.
- Flexible deployment options: On-premises, in Abacus Private Cloud, or other cloud platforms.
- Workflow automation options to increase firm productivity and profitability from client intake to payments.

### Schedule a Demo Today

Visit [AbacusLaw](#) today to request your demo.

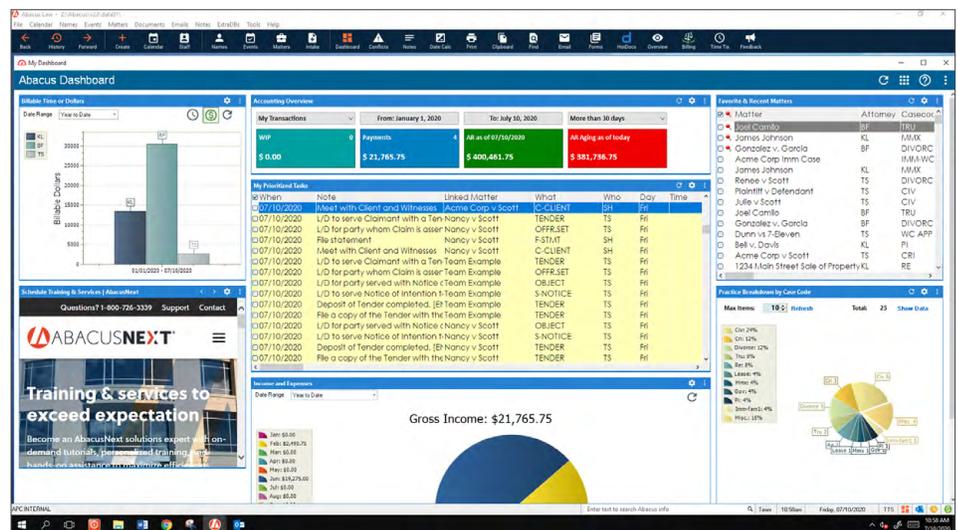


Figure 3: Dashboards give users a focused place to work on day-to-day activities and only see the information they need, such as task lists and calendar items that are specific to them.



## Provide Best-in-Class Client Experience and Manage Matters and Financials from Anywhere, Anytime, with Clio

“ Online payments platform in Clio Manage helps clients easily pay their invoices online using credit card, debit card, or eCheck (ACH).”



**Company Name Brand**  
Clio

**Product Name Brand(s)**  
Clio Manage, Clio Grow

### Latest Developments and Updates

- Online payments platform in Clio Manage helps clients easily pay their invoices online using credit card, debit card, or eCheck (ACH).
- Automated calendar reminders and notifications via text messaging for clients to reply and confirm notifications.
- Sync documents between the desktop and Clio Manage using Clio Drive.
- Clio for Clients mobile app lets clients securely communicate with their lawyer by sending and receiving messages, case updates, and documents.
- Send clients automated bill reminders and payment links that are personalized and based on a customized cadence that you set.
- Clio acquired Lawyaw, which automates the creation and completion of forms and legal documents, and CalendarRules, which automatically populates calendars with critical court dates and deadlines from over 1,800 US courts and jurisdictions across 50 states.

### Better Client Experiences

Clio's cloud-based legal practice management (LPM) platform helps law firms provide better client experiences through a range of client-facing benefits. The LPM includes web-based and mobile-friendly custom intake forms, electronic billing and payments, the Clio for Clients app, Microsoft Teams, and Zoom video conferencing integrations.

**Clio Grow** online client intake attracts new client leads, tracks their progress, and ensures seamless intake workflows to retain them. The intake software tracks inquiries to ensure expedient follow-up. It offers customizable intake forms to quickly gather important information via the web or email, leading to client engagement. See *Figure 1 on the next page.*

The **Clio for Clients** mobile app for Android and Apple iOS devices supports secure text message calendar notifications and reminders with the client's ability to respond to confirm or decline a meeting, along with the capability to manage documents and pay invoices online. The app can send, receive, and store files, scan documents, and take photos. Furthermore, clients can call Clio support if they need help.

“ With the CalendarRules acquisition, Clio creates events based on the rules and deadlines of hundreds of US courts. A firm can set their trigger dates and times and select applicable court events to place on users’ calendars, which can sync to Outlook and Google.”

You can manage a Google Business Profile through Clio to make it easier for clients to find a law firm. The firm can also connect Clio Scheduler to your profile so clients can book time from a search result. Clio Scheduler supports Zoom integration, handles event reminders, and even accepts payment before a booking.

**Clio on the Case**

Clio’s Matter Dashboard gathers all the information you need to serve clients and get paid. The Financial Box totals work in progress items (time and expense entries) detailed in the Activities tab. Click the Quick Bill button to compile an invoice from unbilled items and generate an email template to send the invoice via email or the client portal. *See Figure 2 on the next page.*

Every firm member can keep track of the cases and client information they need to accomplish their tasks. The software’s integrated task management works like project management software, supporting task templates, assignments, and organized and cascading checklists to ensure that no task is left undone.

The document management system enables law firms to store an unlimited amount of attachments (in matter documents) and email messages (in communication logs) securely in an electronic format that is instantly retrievable by any appropriate firm member with permission to view the matter, whether in or out of the office or on a mobile device. Clio stores all versions

of documents with a timestamp and author to track the history of files. You can save messages and attachments directly to Clio with Google and Outlook plug-ins. With Clio Drive, staff can directly access their files in Clio from their desktop’s file manager, speeding up the process of finding, creating, and editing documents.

Lawyers can sign documents and send signature requests to clients and third parties with the built-in e-signature service. With Clio’s acquisition of Lawyaw, you can automatically fill in court-approved documents with client and matter data. Select court forms from supported jurisdictions, including California, Florida, Texas, Illinois, Georgia, and New York, as well as US Immigration, and choose one or more forms and select a matter. Generate the documents and download them for signature and court filing.

**Clio Calendaring**

Clio helps lawyers stay organized with advanced **calendaring** features that synchronize with Google, Microsoft Office 365, and Teams calendaring systems. Clio makes it easy to manage firm-wide and individual calendars and share and invite others to events like Outlook and Google calendars. Other calendar features include custom reminders, creating Zoom meeting links for event attendees, and sending clients automatic event reminders and notifications via text for them to reply and confirm. You can also log time entries when working with calendars to facilitate efficient and accurate billing.

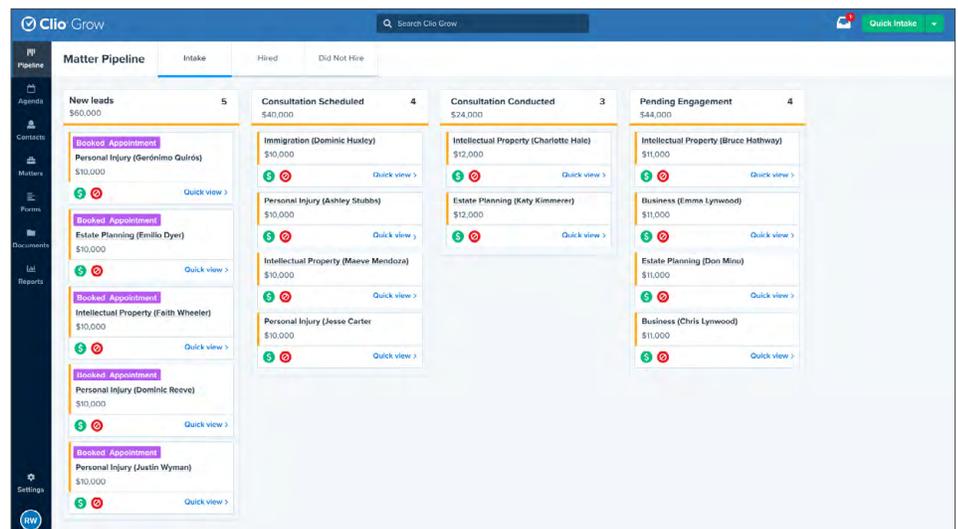


Figure 1: Clio’s pipeline view shows lead status along a workflow of discrete tasks.

“With Clio’s acquisition of Lawyaw, you can automatically fill in court-approved documents with client and matter data. Select court forms from supported jurisdictions, including California, Florida, Texas, Illinois, Georgia, and New York, as well as US Immigration, and choose one or more forms and select a matter.”

With the CalendarRules acquisition, Clio creates events based on the rules and deadlines of hundreds of US courts. A firm can set their trigger dates and times and select applicable court events to place on users’ calendars, which can sync to Outlook and Google.

### Billing and Payment Processing

Clio’s billing and payment processing provide law firms with a seamless method for tracking time and expenses, generating bills, running reports, and getting paid fast.

Lawyers can track time and expenses against billable work anywhere in Clio’s web-based software and mobile apps. The software’s comprehensive billing features enable you to quickly edit bills and time entries and share invoices with clients via personalized email or Clio’s secure online portal. With [Clio Payments](#), you can also set up payment plans for clients, ensure trust funds maintain adequate balances, log trust transactions and run reports (in compliance with bar association regulations), and charge interest on unpaid invoices.

### Reporting Financials and Key Performance Metrics

You can generate comprehensive reports for accounts receivables, invoice aging, revenue, fee allocations, and productivity by client and matter.

Clio’s billing reports provide detailed insights on firm and staff productivity,

individual clients, lawyers, date ranges, case types, or trust account status. All reporting is easy to generate, customize, and export to ensure that leadership gets a detailed and on-demand understanding of the firm’s financials.

Law firms can also monitor key firm metrics from an intuitive Insights dashboard. *See Figure 3 on the next page.*

With Clio’s [Firm Dashboard](#), firms can monitor how many hours have been worked, billed, and collected and identify areas for improvement. Clio tracks critical growth and performance metrics over time to achieve short and long-term goals.

### Securing Your Client Data in the Cloud

Clio uses role-based permissions to restrict sensitive case information and enforce strong passwords and regular password resets. You can verify logins using two-factor authentication (2FA) with the Clio Mobile App or another multifactor authentication app from the likes of Google or Microsoft.

The software logs the IP address of every session to monitor your account for suspicious activity, and the firm’s data is securely transmitted and stored using industry best practices (HTTPS, TLS). Clio offers hosting options in the US, Canada, and the European Union to meet data residency and privacy requirements.

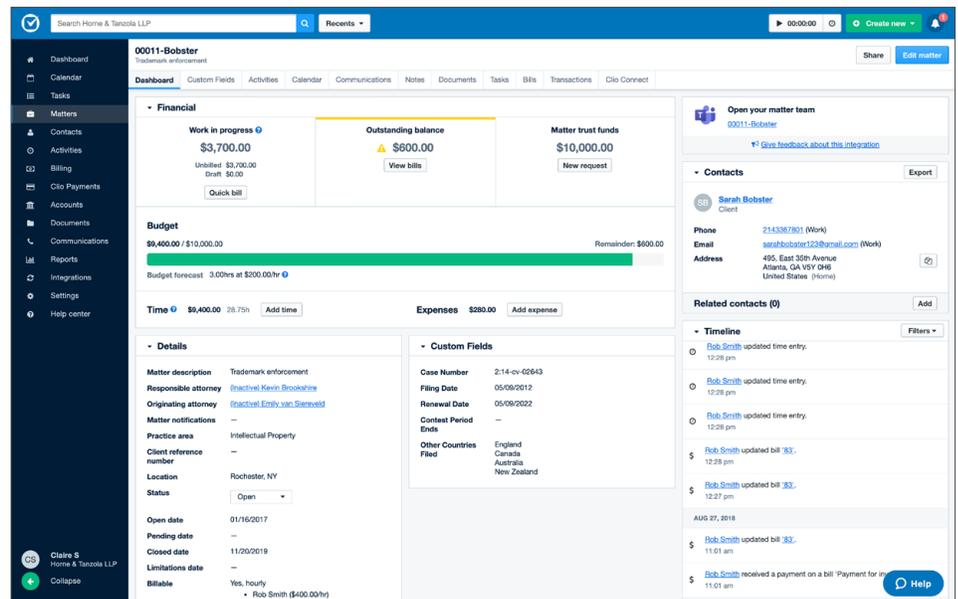


Figure 2: Clio’s Matter Dashboard.

## Integrations

Robust integrations with DocuSign, Dropbox, Microsoft 365, QuickBooks Online, Google Calendar and Business Profiles, and Zoom provide the opportunity to streamline data and task management. Clio supports more than 200 app integrations available from the Clio App Directory.

## Pricing

Pricing ranges from \$39 to \$99 per user per month billed annually depending on which Clio Manage tier you choose: Starter, Boutique, or Elite. At the individual level, you can add Clio's client intake and legal Customer Relationship Management (CRM) software (Clio Grow) to a Boutique or Elite plan for \$49 per user per month. Or you can bundle Clio Manage and Clio Grow in a Suite subscription for \$125 per user per month billed annually. Court calendaring rules are included in the Elite, Suite, and Enterprise subscription plans. Clio Payments is included in all Clio Manage subscriptions.

## Who is Clio?

Jack Newton, CEO, and Rian Gauvreau, chief people officer, founded Themis Solutions in

British Columbia, Canada. They released Clio, the first cloud-based law practice management system, in 2008. Clio has more than 150,000 customers in 100 countries. More than 70 bar associations and law societies approve using the software-as-a-service suite with the Clio Affinity Program, and they offer member discounts on Clio products. In 2021, the company announced a new valuation of \$1.6 billion after raising \$110 million in a Series E round led by T. Rowe Price Associates, including OMERS Growth Equity.

## Why Buy Clio?

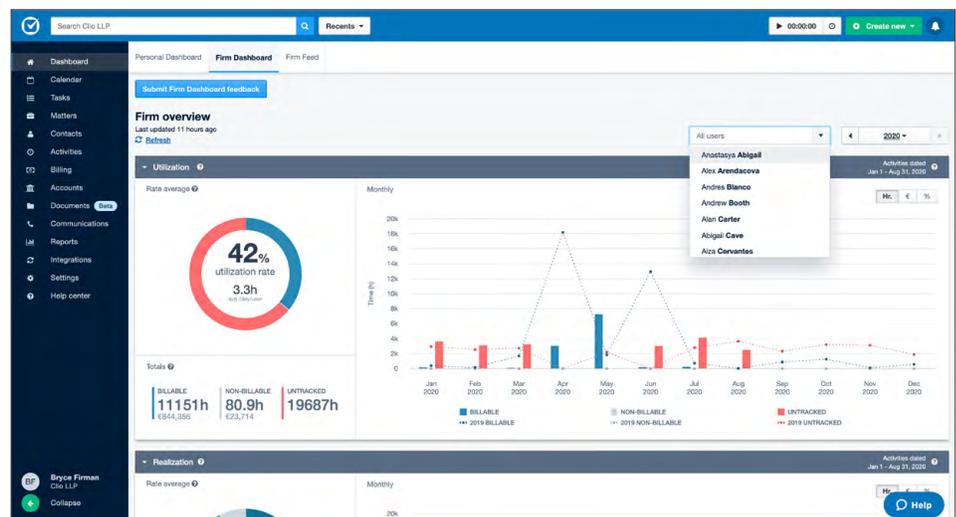
- Get Started Quickly: Quickly get organized and simplify the time tracking and billing process with help from Clio's highly rated onboarding and training team and complimentary data migration.
- Add efficiencies with custom workflows and app integrations that support your firm from intake to matter activity, managing financials and trusts, through billing and payment to help you free time to focus on serving clients and managing the firm.
- Provide a best-in-class client experience with Clio's integration with a Google

Business Profile, web-based intake forms, online bill pay, and Clio for Clients mobile apps.

- Generate court-approved forms with client data and quickly get them e-signed and filed by the appropriate parties.
- Use customized trigger dates to import selected court calendar rules and synchronize the events with Google and Outlook calendars.
- Use Clio Scheduler to book online client meetings and automatically include Zoom invites.

## Getting Started (CTA)

Clio is free and easy to try. The company offers an extensive roster of support, training, and practice management experts to help your firm organize and set up, including migrating data from other solutions. See how Clio can help you work more efficiently, offer better client experiences, and let you manage and grow your firm by [scheduling a free demo at www.clio.com](https://www.clio.com).



**Figure 3:** Clio's Firm Dashboard gives a better understanding of how lawyers spend time and their impact on revenue by analyzing the firm's utilization, realization, and collection rates.

# Client Expectations Have Changed. How is Your Firm Adapting?

By: Josh Kern



Josh Kern is a writer and B2B marketer based in Toronto, with client-side, agency-side, and freelance experience. Josh specializes in content marketing and helping organizations determine the right content for their audience during each stage of the buying journey.

Beyond his role as a Content Strategy Manager at Clio, Josh has written content for FreshBooks, Moneris, Livingston, Farber Financial, Yellow Pages Canada, Henry's Camera, and more. Josh is also an editor and writer at Raptors HQ, SB Nation's Toronto Raptors blog.

## Introduction to Legal Technology and Automation

The global pandemic has sparked a major shift in law firms willing to invest in technology. With lawyers, clients, and large parts of the legal apparatus either working from home or in smaller, socially-distanced settings, adopting new technologies that enable these new ways of working and interacting has been critical.

While few positives can come out of a global pandemic, many law firms now realize the advantages that technological innovation can bring. Beyond just "doing it this way now because we have no choice," firms that buy into new technologies such as legal practice management, document automation, and remote meetings are seeing an uptick in both client satisfaction and billable hours.

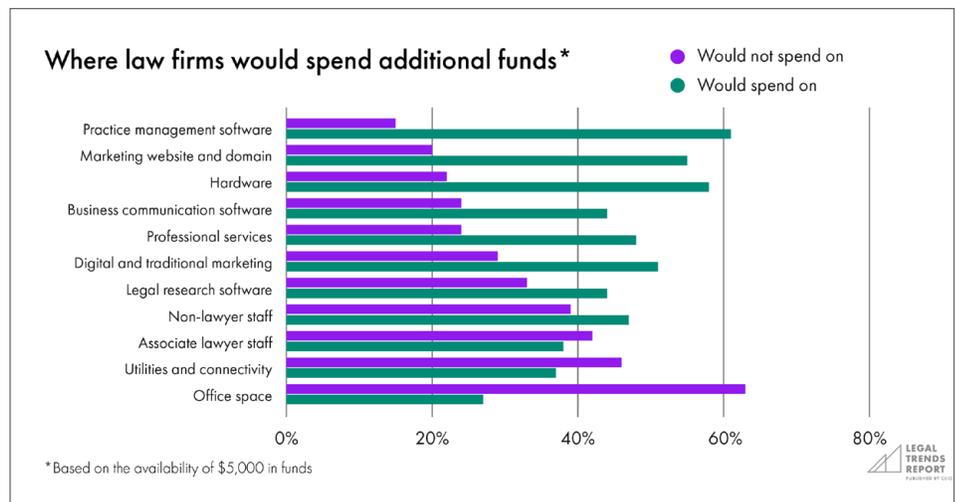
And while both of those things are important, it's the improved client experience that will genuinely drive long-lasting change in the legal industry.

## Technology Adoption is at an All-Time High

According to data collected for Clio's [2020 Legal Trends Report](#), law firms adopted new technology solutions during the pandemic at a rapid rate. 85% of respondents said they were using some form of software to manage their firms, and 83% said they were meeting clients virtually. Furthermore, 95% of respondents said they plan to continue using these solutions post-pandemic.

As part of the [2021 Legal Trends Report](#), Clio asked firms where they would most likely invest an influx of capital, and 61% of respondents said they would invest more in hardware (such as computers and tablets) and software (such as legal practice management solutions). This indicates that firms believe these tools can help their firms grow, both by improving existing processes and improving client services.

But adopting new technology is only the beginning. It's the benefits of the



technology that truly matter: firms have reported seeing increased service levels for clients and an increase in quality of life for legal professionals. More than two-thirds of respondents said technology helped their firms deliver better client experiences and set them up to handle future disruptions better. In addition, more than half of respondents said technology improved their work-life balance.

### Technology that Helps Firms Thrive

When we say law firms are adopting new technology, what are we really talking about? Sure, firms can use Google Docs to collaborate and Zoom to meet clients face-to-face. But the solutions that are making a real impact, and driving long-term change, are practice management, client relationship management, and document automation solutions. These technologies improve efficiency, increase productivity and billable hours, and deliver top-notch client experiences.

### Legal Practice Management Software

Legal practice management software, or LPM, is an essential tool for law firms in 2022. With an LPM solution, lawyers and firms can:

- Organize cases and matters, and easily share notes, tasks, and documents, all from a single location.
- Better track time and expenses.
- Easily create, approve, send, and track invoices.

Cloud-based LPM solutions like [Clio Manage](#) are accessible from any computer with an internet connection, allowing lawyers to work wherever they are – from home, office, or courtroom.

The [ABA's 2020 Legal Technology Survey Report](#) noted that the use of practice management software was trending upwards for solo attorneys (with an increase from 1% to 29% in 2020) and smaller firms. In addition, the use of practice management software among firms with 2-9 attorneys increased 2% in 2020, to 45%.

### Client Relationship Management Software

Intake is critical in establishing a good relationship with your clients. A client relationship management system, or CRM, can make the process easier for clients, and help you do it more efficiently. It will also help you keep new client information organized across your firm, ensuring that no follow-ups get missed, or conflicts of interest arise.

CRM solutions, like [Clio Grow](#), help firms with intake, scheduling meetings, follow-ups, collecting e-signatures, and more. CRM solutions deliver streamlined, simplified client intake processes that reduce manual effort on the part of the firm, and deliver better experiences to clients.

The 2021 *Legal Trends Report* indicates that firms experiencing continuous growth are almost 50% more likely to use client intake and CRM solutions than stable or shrinking firms.

### Document Management and Automation Software

Automation is an important part of how technology is transforming the practice of law. It's an inherent part of both LPM and CRM solutions, but automating

document management can save firms even more time.

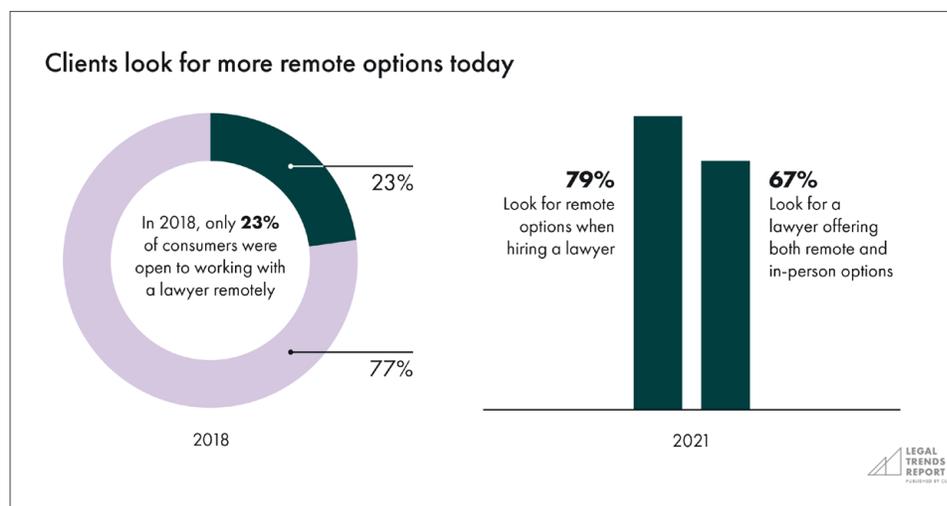
Document automation helps lawyers draft and compile legal documents quickly and accurately, freeing them up to focus on more impactful work. Legal document assembly is a particularly time-consuming, "shallow" task, one that can keep legal professionals metaphorically chained to their desks. Solutions like [Lawyaw](#), a Clio company, help lawyers and legal professionals build and draft complex legal documents more quickly and with fewer errors.

### Technology That's Best for Clients, from Intake to Close

The above solutions can help firms operate more efficiently, make more money, and empower legal professionals to serve their clients better. Additional solutions like videoconferencing also play a part in serving your clients. Your LPM and CRM solutions help you intake clients and keep their case files organized, and solutions like Zoom facilitate the meetings.

As part of its *Legal Trends Report*, Clio surveys consumers as well as legal professionals. In 2021 consumers expressed a high degree of preference for video conferencing as a communication option. This is true throughout an entire legal matter, from intake to status updates.

Once again, we can look to the global pandemic for driving this change. Looking back at data from the 2018 *Legal Trends Report*, only 23% of consumers were open to the idea of working with a lawyer remotely. That number jumped to 79% of



survey respondents in the 2021 *Legal Trends Report*.

In addition, videoconferencing is now the third-most preferred communication preference among consumers for initial consultations; 58% of respondents said they'd prefer to communicate over video call, with only in-person (76%) and telephone (70%) being more preferred. In 2018, the number of respondents that preferred video calls was so low it wasn't even included as a category in the final report.

Zoom calls weren't the only solution of choice, though; overall, tech-enabled forms of communication are now a standard expectation among clients. These include email as well as text messaging, secure client portals, and mobile apps.

These solutions speak to a "meet clients where they are" approach. Consumers today don't want to be locked into a one-size-fits-all experience; they want the choice to communicate with service providers in a way that works for them and their lifestyles.

### Using Technology to Process Payments

The same "meet clients where they are" notion applies to paying for legal services. Clients prefer payment options that prioritize convenience above all others,

indicating that they would rather pay for legal services online, through automated payments, or through a mobile app before resorting to in-person payments.

After all, traditional payment methods – think cash or check – are time-consuming. Busy clients don't want to write a check manually and mail it; many won't even have checks or stamps on hand. And dropping a payment off in person isn't any more convenient, especially during a pandemic.

Online payment processing solutions represent another win-win situation for law firms. They make it easier for clients to pay you, and make it easier for you to get paid. They also free up time you likely spend chasing down outstanding invoices or struggling to keep up with billing.

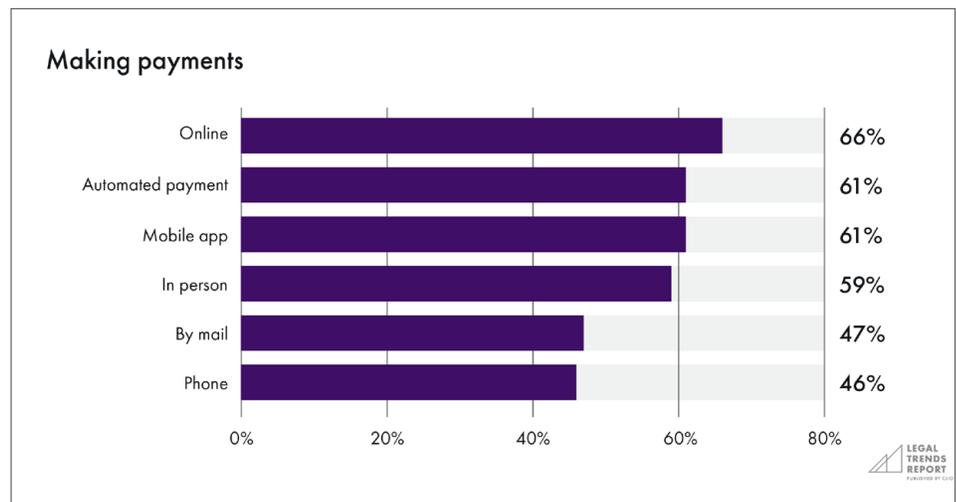
And if you use an online payment processing solution that's integrated with your LPM solution, you can create seamless workflows that directly connect bills and transactions to the appropriate matter or client account. Payments can then be automatically logged and synced with your accounting platform, ensuring your client records are up-to-date across the board.

The benefits don't stop there. According to the 2019 *Legal Trends Report*, firms that

accept credit cards get paid faster—57% get paid the same day they are billed, and 85% get paid within a week. In addition, online payment processing solutions typically enable you to accept payment plans, which are a considerable boon to clients fearful of facing a large, one-time payment. The 2021 *Legal Trends Report* found that consumers ranked payment plans as one of the most important factors when hiring a law firm. This opens your firm up to more clients while increasing access to justice for those who simply can't afford a large retainer up front.

### Conclusion

The idea of technology fundamentally changing a sector or industry isn't new. The legal industry has been historically slow to adopt new solutions, but the global pandemic and evolving consumer preferences are forcing firms to adapt—and they're finding significant benefits to doing so. Not every firm, nor every client, will realize the same advantages nor use new solutions the same way. But the flexibility and versatility of legal practice management, customer relationship management, document automation, and payment solutions give you the ability to better meet the needs of today's clients. ■





## Filevine Organizes Matter Activity to Drive Improved Communication, Collaboration, and Results

“The legal work platform includes Case Management, Lead Management (Lead Docket), Document Management, Contract Management, Business Analytics, and Vinesign (eSignatures). Altogether, the platform serves as the core of your legal team, providing a single location for daily tasks.”

**Company Name Brand**  
Filevine

**Product Name Brand(s)**  
• Filevine Suite, Lead Docket, Vinesign, Outlaw

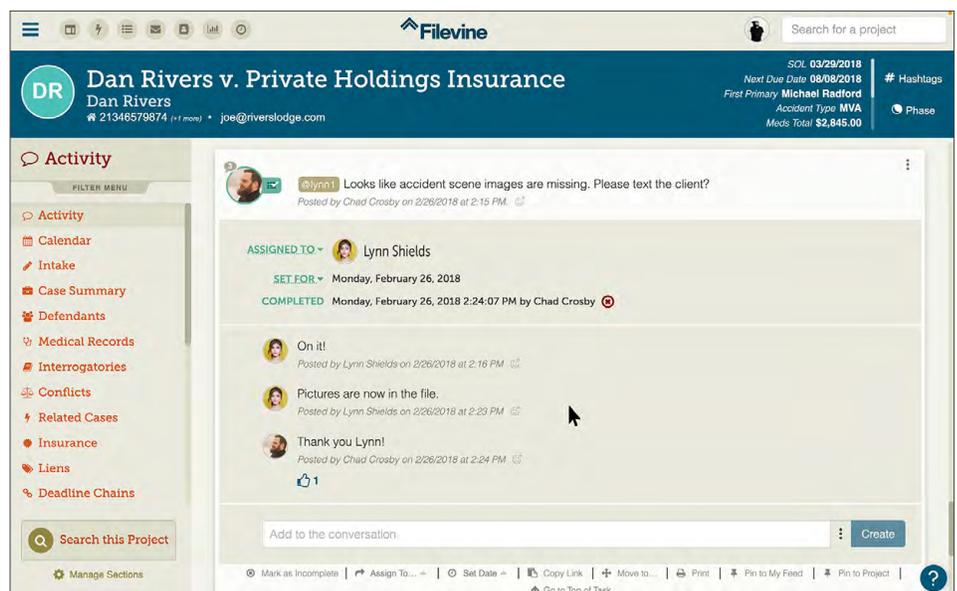
**Latest Developments and Updates**  
• **Acquired Outlaw**, end-to-end contract lifecycle management.  
• Ability to move or copy documents from one project to another.  
• Document or folder zipping, maintaining folder structure within the zip file.  
• Ability to add calculated fields to automatically generate calculations.  
• Updated Outlook integration  
• Vinesign accommodates multiple signers.

**One Platform – Easy Collaboration**  
Filevine is a cloud-based solution built on Amazon Web Services (AWS), presenting users with unlimited storage. The legal work platform includes Case Management, Lead

Management (Lead Docket), Document Management, Contract Management, Business Analytics, and Vinesign (eSignatures). Altogether, the platform serves as the core of your legal team, providing a single location for daily tasks.

Filevine operates with an open API and can integrate with almost any other platform or application. The most common integrations include Zapier, Slack, Google Calendar, Gmail, and Outlook 365. An advantageous integration with Domo is also available for insightful data visualizations.

**Organizing Information as it Grows**  
Filevine gets its name from the idea that information grows in a case just as leaves grow on a vine. The leaves in Filevine include emails, tasks, documents, and more, and the program is highly customizable. The primary way to navigate Filevine is via the left-side panel. The list leads off with Activity, followed by customizable sections (or tabs)



**Figure 1:** The activity feed tracks all interactions in a case. Each activity is time-stamped and available to the entire team, encouraging communication and collaboration.

“ The Documents section is where everything gets cataloged and includes a folder structure configured to fit the law firm’s needs. Filevine provides nearly all PDF editing functionality and doesn’t require a user to export documents to a separate PDF editor.”

designed by the firm and based on essential data. See Figure 1 on the previous page.

### Communication Streamlined

The Activity section operates like a social media feed, intuitively logging all day-to-day activities of a project or case as they happen. Filevine uses tags to identify activity types, and users can filter their view to see activities by type, user, or other options. Activity types include phone calls, text messages, notes, faxes, and documents, appearing in chronological order. Texting can be done within the system and works with mobile devices. The email repository integration shows emails in the activity feed, eliminating the need for long email threads. Integration with Slack allows all messages and chats to be posted on the feed where team members can comment or respond, and you can assign tasks directly from any item. Each user can click on the top right portion of the menu bar to bring up all assigned tasks.

The sections that follow Activity in the navigation panel are based on custom templates designed by the firm and include the data points identified for recording and tracking. These sections can include Intake, Calendars, Case Summary, Case Notes, Time Entries, and Production Documents (for small cases where large databases are unnecessary or cost-prohibitive). A firm can include many other sections with integration points throughout the application. Whether it is accounting/expense data or lead generation activity, all information can be tracked and viewed in Filevine.

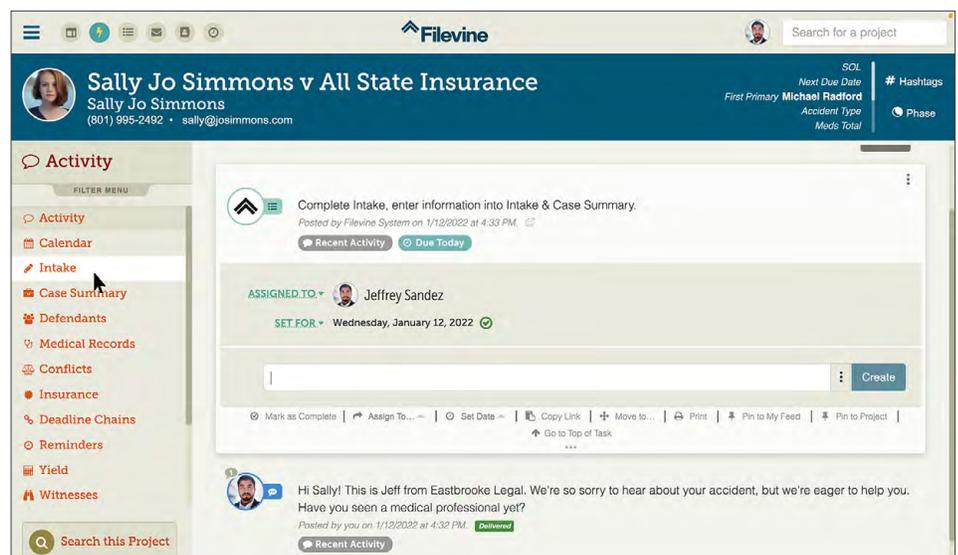
The Documents section is where everything gets cataloged and includes a folder structure configured to fit the law firm’s needs. Filevine provides nearly all PDF editing functionality and doesn’t require a user to export documents to a separate PDF editor. Send combined or individual documents as embedded links or as an encrypted URL. When sending documents outside the firm, you can specify who has access, assign passwords, set expiration, rights to download, print capabilities, and more.

### Enhanced Project Management Features

Additional benefits of Filevine include automation of tasks and workflows. Assigning a task includes automation to trigger next steps, thereby enforcing well-defined workflows. Each workflow can be designed based on the case type and requirements. See Figure 2.

Filevine has rules-based calendaring, keeping everyone on the team aware of deadlines. Timekeeping and billing functionality tracks the dollars associated with practice areas, giving each team member a way to log their time and the finance and management team the ability to gauge firm profitability.

In addition, Filevine’s Outlaw makes contract generation and management simple and efficient with its industry-leading contract lifecycle management solution. The eSignature solution, Vinesign, was designed for easy and secure eSignatures that are



**Figure 2:** Filevine tracks information/communication as it grows in a case. Everyone has access to tasks that are assigned and any comments. A user can mark a task as completed, filter by assigned to, set a due date, and more.

“Assigning a task includes automation to trigger next steps, thereby enforcing well-defined workflows. Each workflow can be designed based on the case type and requirements.”

verifiable and legally binding. Filevine is SOC 2 Type 1 certified, GDPR and HIPAA compliant, and CJIS 5.0 adherent.

### Reporting and Business Analytics

Filevine has built-in and customizable reporting. Based on their needs, users can generate canned reports and customize them via filtering. Reports can be exported to Excel or PDF and scheduled for delivery daily, weekly, and more.

Periscope is the place to go for a picture of firm performance. Built on Domo's embedded analytics, Periscope provides a user with several customizable dashboards that you can fine-tune based on firm needs. Each dashboard has visualizations, such as pie and bar charts, comprised of clickable data points. Each data point will trigger a report that gives the user a deeper dive into the information, allowing for a more focused view of the data via Quick Filters. See *Figure 3*.

### Support and Customization

Filevine provides services to assist clients, including consulting and implementation, data migration, training, and support. The smallest details of a firm's practice areas can be customized, from field name to template development, ensuring defined workflows are followed and everyone is working in coordination.

### Pricing

Filevine provides pricing based on the number of users and modules deployed.

### Who is Filevine?

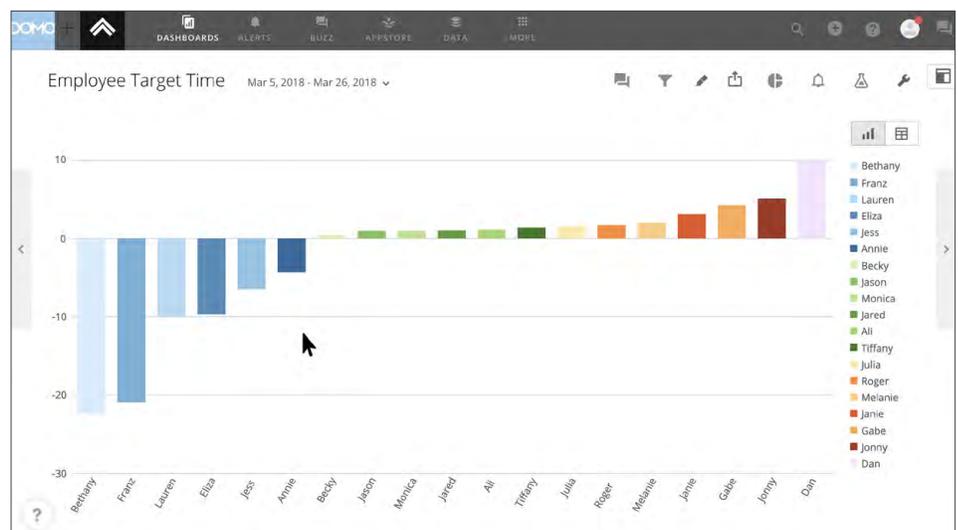
Launched in 2014, Filevine is a cloud-based case management solution. Filevine is dedicated to empowering all organizations with tools to simplify and elevate complex, high-stakes legal work. Powering everything from document management and client communication to contract lifecycle management and business analytics, over 25,000 legal professionals use Filevine daily to deliver excellence in every contract, deadline, and result. Based in Salt Lake City, Utah, with clients in the US and Canada, Filevine employs over 400 people. They have been featured in Forbes, named one of the Utah Business Fast 50, and are among the top 50 fastest-growing privately-owned software companies according to the 2021 Inc. 5000 list.

### Why Buy Filevine?

- Automate legal workflows, centralize communications, and improve business management.
- Business analytics help your firm get better insight into performance, fueling better business decisions.
- Manage information in one place across different practice areas, including intake and lead tracking, marketing automation, business analytics, document automation and storage, eSignatures, contracts, deadline tracking, and more.

### Schedule Your Demo Now

[Request a demo](#) or contact Filevine at 801-657-5228. Follow Filevine on [Twitter](#), [Instagram](#), [LinkedIn](#), or [Facebook](#).



**Figure 3:** With dashboard views for Case Management, Intake Settlement, User Action Reports, Task Reports, Client Demographics, Projected Settlement Dates, and Cycle Time, Periscope becomes the one-stop information center needed to track everything from day-to-day operations to long-term financial health and employee time tracking against KPIs.



# Lawmatics Expands Legal Practice Management to Support the Entire Client Experience from Intake to Representation and Recurring Business

“Lawmatics drives efficiencies using automation to onboard leads, increase client engagement, manage matters, and use data insights to gain new and recurring business.”

**Company Name Brand**  
Lawmatics

**Product Name Brand(s)**  
Lawmatics

**Latest Developments and Updates**

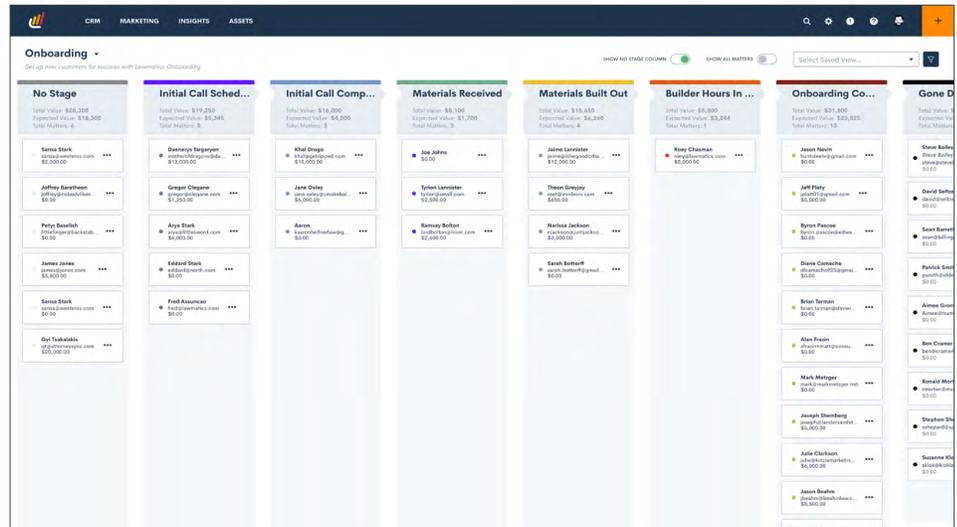
- Communicate with clients using secure two-way messaging via web portals.
- Send email messages at a specified time or in a window of time.
- Create custom documents and booking forms with merged fields and conditional logic.
- Apply merge codes to PDF templates to create and reuse custom forms.

**Clients are at the Heart of Matters**

If a client is at the heart of every matter, then a customer relationship management (CRM) function should be the heart of legal practice management (LPM) software. [Lawmatics is a legal CRM](#), client intake, and

marketing automation platform. Lawmatics drives efficiencies using automation to onboard leads, increase client engagement, manage matters, and use data insights to gain new and recurring business. Everyone in the firm can view the status of leads and clients in workflows or pipelines by stages. For example, an intake workflow or pipeline view of the CRM platform shows staff where all your leads are and their status relative to signing a retainer. *See Figure 1.*

The CRM platform leverages machine learning and analytics to report estimated values on potential cases and conversion rates in the pipeline based on the firm’s revenue numbers. Other reports include return on investment for marketing campaigns; lead volume over time; event statistics; costs per lead and client; and referral data, such as who refers cases and their average value. *See Figure 2 on the next page.*



**Figure 1:** Lawmatics’ pipeline view gives you a visual of where all matters stand at any given time. Customize the pipeline stages to meet your firm’s unique needs and processes. You can also have multiple pipelines to organize leads and manage cases according to status, practice area, or case type.

“ Lawmatics enables you to automate your entire intake process and other repetitive processes or tasks that might be part of your firm’s flow. Think of it as a blueprint of actions that eliminate time-consuming tasks like preparing emails, sending messages, and manually scheduling events.”

“ The online editor makes it easy to create documents and drag and drop field codes onto the files. Then merge data into the fields and automatically send the documents to clients or other parties for a signature.”

Lawmatics includes task management with automated actions based on triggers, such as client activity or matter status. If a client opens an email or signs a document, the CRM platform can take a preprogrammed action to send follow-up personalized emails with prefilled forms immediately or at a set time. Automate actions for other triggers, such as when clients send or sign a document, book an appointment, or send a text message.

Lawmatics can control when to send emails using a specified date and time or in a window. Set a delivery time using the clock icon next to the Send Mail button. Using automation, configure a trigger action to send a message in a time window on specified days after a client takes some action, such as sending an email, completing a form, signing a document, sending a payment, or making a document request.

Following up its release last year of client portals to share documents and calendar events, Lawmatics recently added secure two-way messaging to portals. The messaging feature is designed like email but operates like instant messaging. Centralize all client communication in a portal rather than receive and store sensitive client messages in your email inbox.

Lawmatics stores incoming and outgoing client communication in message threads that make for a topical and historical record of client interactions. With search and filter functions, you can easily switch

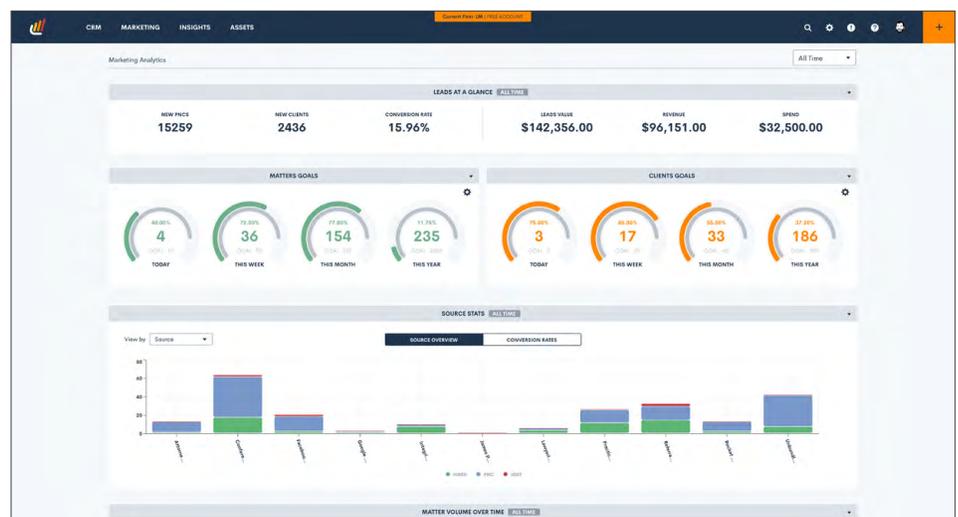
between matters and find who sent what and when. You can also invite clients to a portal with automation.

### Legal Automation Your Way

Lawmatics’ legal automation includes a powerful user interface (UI) that lets you drag and drop data fields onto forms to quickly create web-based intake forms, including embedded calendars and booking links that can use Zoom locations. Lawmatics can work with any calendaring system, such as Google Calendar, Microsoft Outlook, and Exchange.

Place fields for names, emails, phone numbers, and more onto forms and give each field a label, which in some cases can be a question prompt. Paginate the forms and add blocks of conditional information that appear when gathering more data on a case type. Save and preview the forms, then share them with potential clients on your website or blog using a code snippet supplied by Lawmatics. When leads fill out and submit the information, Lawmatics stores the data in its CRM platform to reuse on demand, such as when automatically sending emails and [SMS text messages](#) to clients and routing forms to their respective workflows or pipelines.

Lawmatics enables you to [automate your entire intake process](#) and other repetitive processes or tasks that might be part of your firm’s flow. Think of it as a blueprint of actions that eliminate time-consuming tasks like preparing emails, sending



**Figure 2:** The analytics dashboard is hardwired to provide the data you need in an easily digestible and appealing visual format. Track statistics and KPIs in one central dashboard, such as how many leads came into the firm, conversion rates, forecasting, business development goals, source tracking, and cost/client.

messages, and manually scheduling events. You can create automated workflows to move potential clients through every stage of the client journey. See [Figure 3](#).

### Document Automation from the Desktop to the Cloud

Lawmatics provides three ways to create documents automatically. Use the online editor, upload a Word document, or work online with PDF files. Each method supports the system's new built-in e-signature feature.

With the online editor, create agreements, document and email templates, and custom forms, such as intake and booking forms, and merge database fields or blocks of conditional text stored in the database. Conditional fields and data blocks can correspond to personalized client data and case types, such as criminal, personal injury, and family law.

The online editor makes it easy to create documents and drag and drop field codes onto the files. Then merge data into the fields and automatically send the documents to clients or other parties for a signature. For example, when a client returns a fee agreement, the platform can send them an invoice to collect a retainer and receive payment via integration with LawPay.

Rather than creating a document, start with an existing PDF file as a template. Using the online editor, drag and drop field codes onto the file and save it as a template. You can also use Microsoft Word on the desktop and incorporate any field code from the Lawmatics database. When you upload the file, Lawmatics merges data to match the codes. Use and reuse the files with merged content from the database to fulfill client and court requirements.

Lawmatics supports conditional logic to complete documents with logical rules using if-then-else statements to include or ignore merged content when using the online editor and Microsoft Word. For example, develop booking forms with complex rules to book by practice area or legal issue and assign appropriate staff with conditions on their availability.

### Technology Platform & Pricing

Lawmatics runs on Amazon Web Services (AWS) in a multi-tenancy architecture. First-party integrations with Lawmatics

include Clio, Filevine, PracticePanther, Rocket Matter, Smokeball, CallRail, RingCentral, and Wealth Counsel. Lawmatics supports an open RESTful application programming interface (API) for custom integration at no extra cost.

Lawmatics uses subscription pricing in three product bundles: Lite, Pro, and Enterprise. The products include various features of client intake, CRM, marketing automation, customer reports, and insights. All products come with CRM features, SMS/text messaging, e-signatures, custom reporting, API access, and more. Only the Pro and Enterprise products support client portals.

Pricing for Lite starts at \$169 per month, including three users (\$42 per additional user per month) and 10,000 contacts. The Pro product starts at \$212 per month for three users (\$50 per additional user per month) and 15,000 contacts. Both Lite and Pro have a one-time setup charge of \$399. The Enterprise product has custom annual pricing, a ten-user minimum, unlimited contacts, and dedicated onboarding and support.

### Who is Lawmatics?

Based in San Diego, California, with operations throughout the US, Lawmatics

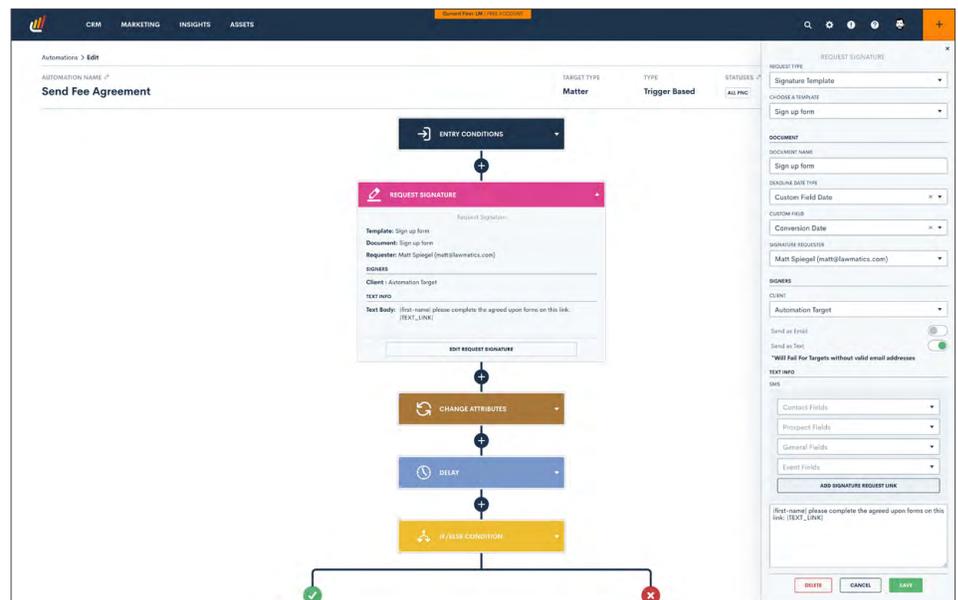
offers solo practitioners and small to midsize law firms (5 to 100 attorneys) legal customer relationship management, client intake, and marketing automation software-as-a-service. Matt Spiegel, founder and CEO, leads the company after gaining much experience in founding and leading MyCase in the same market segment. Lawmatics raised a total of \$2.5 million in seed funding in 2020 and closed 2021 with **\$10 million in a Series A funding** round led by Ankona Capital. The company employs more than thirty people and is in active growth mode.

### Why Buy Lawmatics?

- Lawmatics is a legal automation platform allowing lawyers to focus on practicing law without getting bogged down with administrative tasks.
- Manage the entire client life cycle through multiple matters and gain insight into new and recurring business.
- Use advanced document and marketing automation to create and reuse Microsoft Word and PDF templates.
- Securely communicate with clients using SMS texting via client portals.

### See Lawmatics Today

[Schedule a demo of Lawmatics](#) today to learn how it can help you!



**Figure 3:** The automation engine is an intuitive, visual interface that allows users to create customized workflows by simply connecting the system actions you want to automate, such as email, SMS, an appointment request, or sending a document. No coding is needed.



# Litify Provides Powerful Task Automation, Flexible Matter Plans, and a Wealth of Integration Options, Built on Salesforce, to Improve Productivity and Efficiency

“Built on the Salesforce platform, Litify is entirely cloud-based and designed from the ground up specifically for law firms.”

**Company Name Brand**  
Litify

**Product Name Brand**  
Litify, Docrio

### Latest Developments and Updates

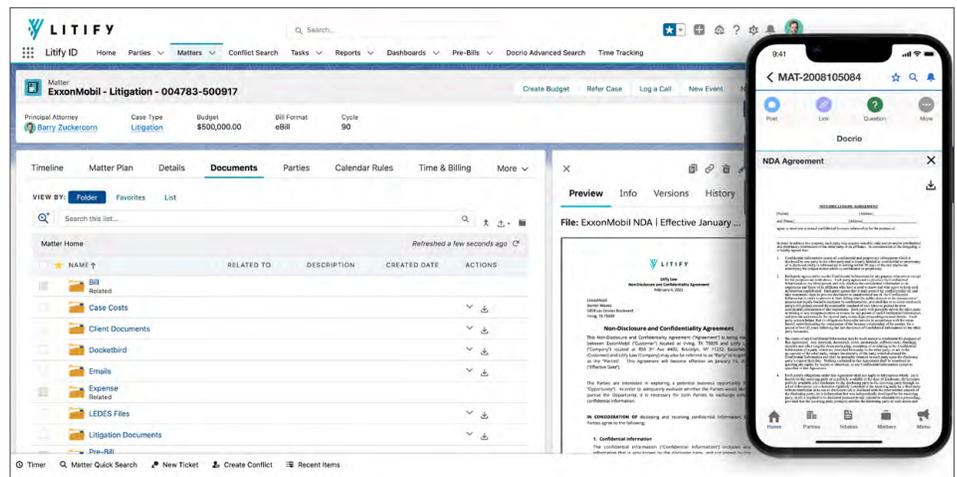
- New multi-factor authentication (MFA) prevents cyber-attacks and is included free with a Litify subscription.
- Create new matters and tasks right from the activity timeline and assign multiple team members per task to keep matters moving forward quickly.
- Advanced search on documents (OCR), preview and listen to audio and video files, and share large sets of documents with a single link.
- Locate work from the inbox faster; use a checkbox to save emails and documents from your inbox and automatically add them to the ongoing thread in a matter.
- Run advanced searches on time entries, combine templated PDF bills, easily track costs, and leverage more flexible billing rates.

### One Platform to Manage it All

Built on the Salesforce platform, Litify is entirely cloud-based and designed from the ground up specifically for law firms. As a notable benefit, Litify can automate routine tasks and integrate with anything that integrates with Salesforce, which includes thousands of applications on the app exchange. Additionally, Litify integrates with iManage, NetDocuments, Outlook, DocuSign, and many more. Browse through [the integration possibilities](#) with Litify.

Because Litify is built on a platform dedicated to transparency, users can count on the availability of their system. [Information on service availability and performance](#) is available to review at your convenience.

Litify provides both desktop and mobile apps and is available for iPhone or Android. iPad users can decide to use either application. The mobile app allows users to see everything available on the



**Figure 1:** Desktop and mobile apps are available. Access anything on your mobile device in real-time, allowing the legal team to work and collaborate anywhere. The menu bar at the top of the screen provides easy navigation across the system.

“ Litify has made matter creation intuitive; simply assign an owner and team, specify the case type, and a workspace is created. The matter workspace is customizable, providing information on the case and related quick links at the top of the screen.”

desktop version, including all dashboards with updates in real-time. Litify Inbox supports two-way calendar sync between Outlook or Gmail. For real-time collaboration, new events and edits made in either location show up in both Litify and a user's inbox.

The menu options across the top include Home, Parties (contacts), Intakes, Matters, Referrals, Tasks, Calendar, Reports, Dashboards, and Docrio document management system (DMS) Advanced Search. When users log in to Litify, they land on a configurable home screen based on their role, practice area, or other selected variables. The home screen has a list of today's events and two tabs, My Dashboard, and My Tasks. The customizable dashboard gives users information such as matters that need follow-up, caseload information, and more. All visualizations on the dashboards are clickable. My Tasks displays a list of all tasks assigned to that user, and the list can be sorted by subject, matter, due date, status, and more. Clicking on a task will bring up a details page. See Figure 1 on the previous page.

Matter intake has been made easy through an automated workflow, starting with the type of case through signing an engagement letter or referral. Litify provides an automated assembly of information through customizable questionnaires. As a user fills out the

forms, relevant questions are presented. Plaintiff firms can easily determine if a case meets their qualification criteria, and the system will automatically generate either an engagement letter or a referral.

Litify has a referral network where users can refer cases that are not well suited to their firm or use Litify to find local counsel when needed. This system gives a firm the ability to manage referrals, both in and out of the firm. [Sign up for the Litify Referral Network.](#)

### Matter Plans

Litify has made matter creation intuitive; simply assign an owner and team, specify the case type, and a workspace is created. The matter workspace is customizable, providing information on the case and related quick links at the top of the screen. Every matter has a set of configurable tabs that include Timeline, Details, Matter Plan, Documents, Questionnaire, and Roles. See Figure 2.

The timeline, where team members will spend most of their time, gives a chronological listing of all activities on the case. Once an item is selected, a panel will open on the right side of the screen for review and subsequent work. Matter plans include a fully dependent task-based workflow. As tasks are completed, additional tasks are triggered with associated deadlines. Litify includes a set of templated matter plans, and a firm can

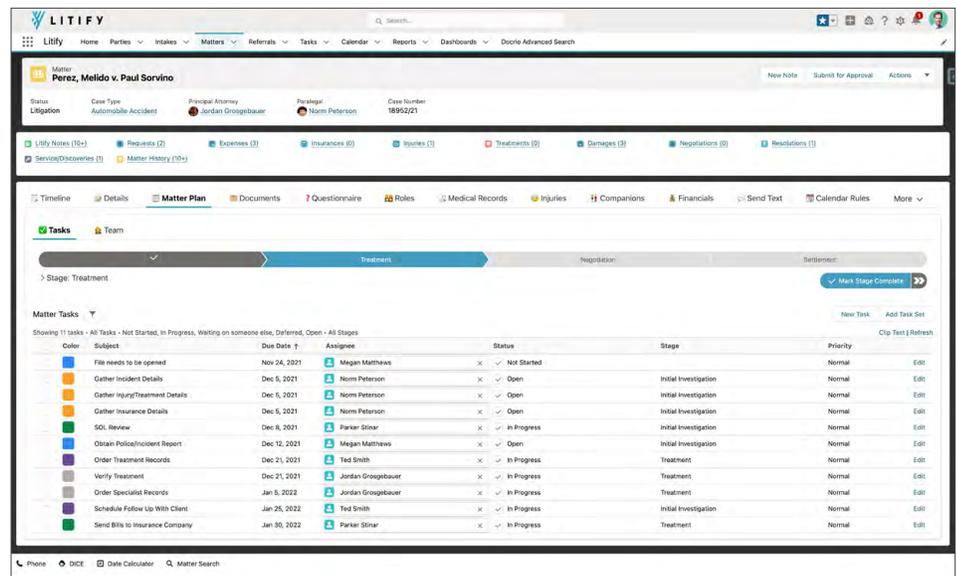


Figure 2: Firms can develop matter plans for each practice area and type of case. These plans are enforceable workflows that ensure consistency and defensibility.

“ Any information entered into the program can be leveraged using Litify’s real-time dashboards, such as time entries or invoices by matter, team, or user. Every user can design a dashboard to assist in their day-to-day work, and as data points change, dashboards will update automatically.”

develop plans based on their protocols and practice areas. These automated workflows ensure that work is consistent and no steps are missed.

### Document Management

A full DMS, Docrio, is built into Litify to create, review, and edit documents. Use current templates or make your own to create routine documents quickly and design folder structures for different case types. As with most DMS, a user can preview documents and see document information, including versions and history. Check a document in and out for editing in Word, and Litify saves it as a new version when you are done. A user can merge documents out of Litify, providing consistency and time savings.

Generate reports on anything put into the system, and Litify provides a wizard allowing users to choose which fields will be displayed. Add reports to dashboards with filters and clickable data points, generate related charts, and export to any format. Additionally, a user can create report subscriptions for delivery on specified dates and times.

### Time and Billing

A complete financial ledger is available, providing the team with all expenses and fees associated with a matter. Team members can manage time via unlimited integrated timers, or manually enter time, save time entries to the relevant matter, and manage billing rates and discounts by party. Timers are available on both desktop and web applications. Firms can send data securely to their accounting system of choice and upload LEDES files to billing portals.

### Dashboards and Reporting

Litify offers powerful reporting, making it easy to manage practice areas, firms, or legal departments. Any information entered into the program can be leveraged using Litify’s real-time dashboards, such as time entries or invoices by matter, team, or user. Every user can design a dashboard to assist in their day-to-day work, and as data points change, dashboards will update automatically. A user can customize how data is grouped and displayed by dragging and dropping. Easily generate reports from any visualization by clicking and exporting. See Figure 3.

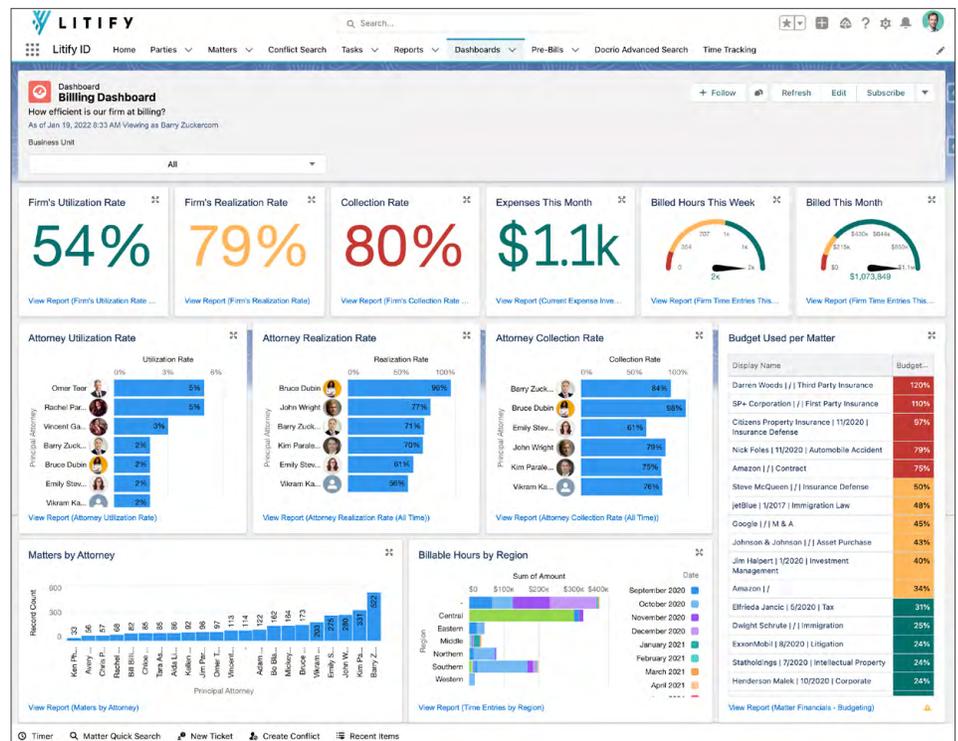


Figure 3: A firm can design as many dashboards as needed to manage its practice. Each data point in the visualizations can be selected, digging into the information used to generate the graphics. In this example, key billing information is shown at the top to identify how efficiently the firm is operating.

## Pricing

Subscriptions are priced on an annual basis for every team member who needs access to Litify. All the rewards of the Salesforce platform are included within the single price of Litify, including best-in-class reporting and analytics, built-in automation, and industry-leading security technology.

## Who is Litify?

Founded in late 2016, Litify is an all-in-one legal platform and business approach on a mission to transform the delivery of legal services through the most flexible, secure technology in the industry. Litify's end-to-end platform streamlines and automates matter and task management, document generation, and client communications

while providing data-driven insights that help law firms and legal teams scale and improve their financial performance. Built on Salesforce.com, Litify is an intuitive, extensible, and rapidly evolving platform. In 2021, Litify was named #1 Practice Management Software by LawFuel. Read how Tracxn has identified Litify as a "Soonicorn": [Emerging Startups 2022: Top Legal Tech Startups](#).

## Why Buy Litify?

- Over 300 customers and 1 in 3 leading plaintiff firms have trusted Litify to transform their business through technology and attentive customer service.
- Litify has built a highly secure cloud-based platform, used and trusted by companies

like NASA and the US Department of Defense. Read more information on Litify's recent [Security Audit](#).

- Constant innovation: With Litify and Salesforce, you can expect eight or more major new product updates per year from the power of two thought-leading product and engineering teams.
- Ultimate control of the platform to adapt Litify for a specific business through infinite configurations and the ability to seamlessly integrate with over 3,400 other systems on the Salesforce AppExchange.

## Schedule a Demo Today!

See how Litify can transform your firm into a high-powered business. [Request a free demo today](#).



# Modernizing Client Collaboration and Business Management

“The OneStop Hub provides an integrated view into matter status and gives you end-to-end control of how the practice and staff are performing to your KPIs. Easily monitor the firm's progress daily and identify areas of improvement and growth.”

### Company Name Brand

Moxo

### Product Name Brand

The OneStop™ Client Interaction Hub

### Latest Developments and Updates

- Moxtra will be operating under a new name, Moxo, along with an updated logo and company website, reflecting the company's evolution over the past decade and its vision for the future.
- Moxo Flow, releasing early 2022, is an update to the Moxo platform to help organizations streamline and drive the efficiency of their client-centric business operations to automate routine tasks and configure custom workflows that align with their business processes.

### Streamlining Client Communications

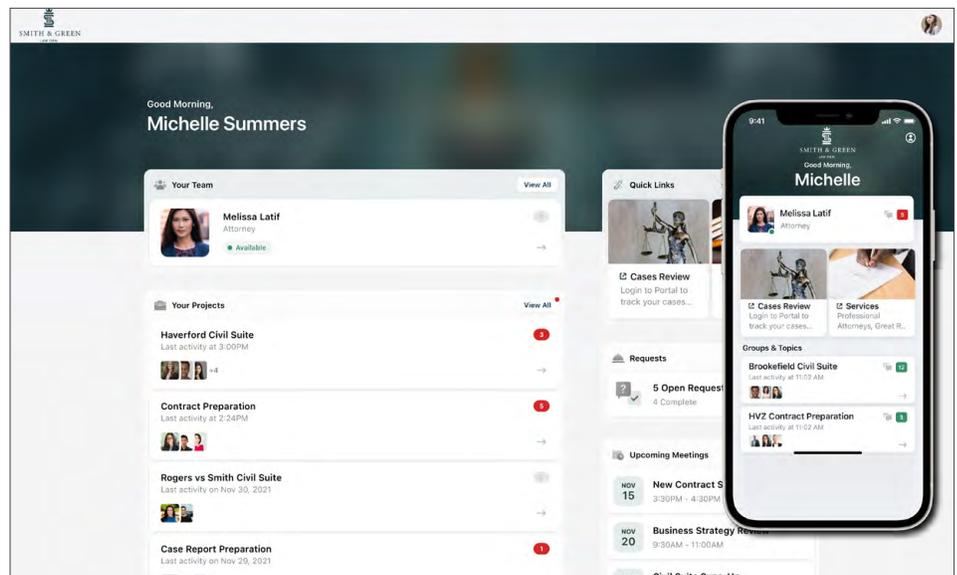
Moxo provides streamlined communication and collaboration with

clients via the OneStop Client Hub. All client communications are generated directly from a workspace or group discussion. Law firms and their clients can find anything related to a matter using either mobile or web apps.

Customize the client portal with the firm's own branding, including name, logo, and colors. Configure document-heavy workflows to automate your business processes and streamline collaboration with centralized communications. The OneStop Hub provides an integrated view into matter status and gives you end-to-end control of how the practice and staff are performing to your KPIs. Easily monitor the firm's progress daily and identify areas of improvement and growth.

### Mobile or Web App

The OneStop Client Hub is delivered in a mobile and web app—providing law firms



**Figure 1:** The Moxo mobile app gives a user access to everything in their matter. Tasks (action items), team members on the matter, support, and access to groups and topics (full workspaces) are available in the mobile and web apps.

“ Moxo is engineered to meet the stringent security requirements of regulated industries with best-in-class compliance, including SOC III, GDPR, and PSD2.”

and client users with easy access to matter-related information. The client and business portals provide access to collaborative tools with a clear and easy-to-use user interface (UI). Upon opening the client portal, a user is greeted by their username and a list of relevant information. See *Figure 1 on the previous page*.

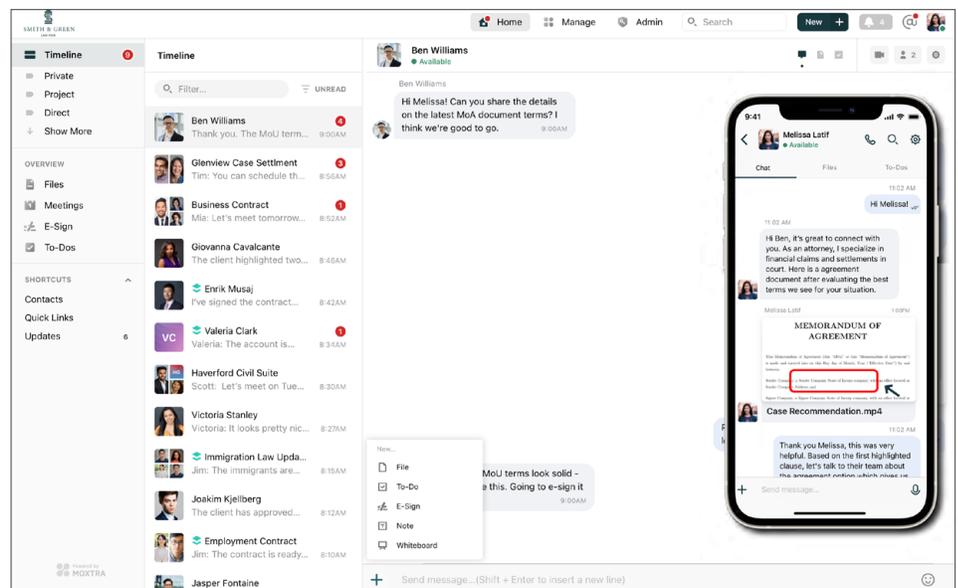
The first item is an advisory of assigned task action items with new items noted. Immediately following, the user has access to the account managers and team members, including complete contact information. Support is available through the Get Support section, where a user can get live, non-team-specific support or generate a service request. Support and request options are currently not sent to specific team members, but they can be fielded and directed appropriately. Matter-specific assistance can be handled via discussion in the Groups & Topics section. Groups & Topics is where all communication and collaboration reside for a matter. Each discussion is a complete workspace with the ability to send and respond to messages and post documents for review, comment, annotation, or e-signature. Messages can be between two or more individuals and titled for easy reference. As team members are added to a message string, they have access to the message string and all items added to the workspace. Team members can also

create tasks or schedule virtual meetings with full screen-sharing capability.

The web app has a similar look and feel to the mobile app. The left panel provides easy access to the different areas of the platform, including the timeline, clients, internal information, and an overview of files, meetings, e-signatures, and tasks. Once the timeline is selected, a user can see all interactions on their matter, including messages, task notifications, documents shared, and virtual meetings. Messages can be between two users or sent to a group discussion, viewable by all, taking the place of phone calls. See *Figure 2*.

### Secure Document Exchange

The Moxo OneStop Platform streamlines document sharing, whether from the content library within Moxo, the cloud, or mobile and desktop app. A user can annotate, redline, comment, and review files within the application, providing detailed collaboration. Send documents for signature via the e-sign module, designed entirely by the Moxo team. Clients will receive a new action item to click and sign a document from either the mobile or web app. Data is fully encrypted in compliance with the ESIGN act. Moxo is engineered to meet the stringent security requirements of regulated industries with best-in-class compliance, including SOC III, GDPR, and PSD2.



**Figure 2:** The timeline streamlines communication and collaboration, providing access to all interactions in a matter. A green icon next to a name indicates that the individual is part of the client team.

“ Client interactions can have customized workflows that include triggers, mobile alerts, and notifications that allow the firm to manage KPIs by monitoring efficiency, cost, and quality.”

A user can schedule or initiate a virtual meeting, synchronizing with calendars and accommodating up to 100 participants. Meetings support recording, which is posted back to the discussion, as well as screen sharing, annotation tools, virtual backgrounds, and co-browsing, which allows for collaboration on web forms.

Create and assign tasks and set reminders to members of the legal team as well as the client, showing up as action items for each user. Task dependency is supported in Moxo and is extended through Moxo Flow. See Figure 3.

**Dashboard and Reporting**

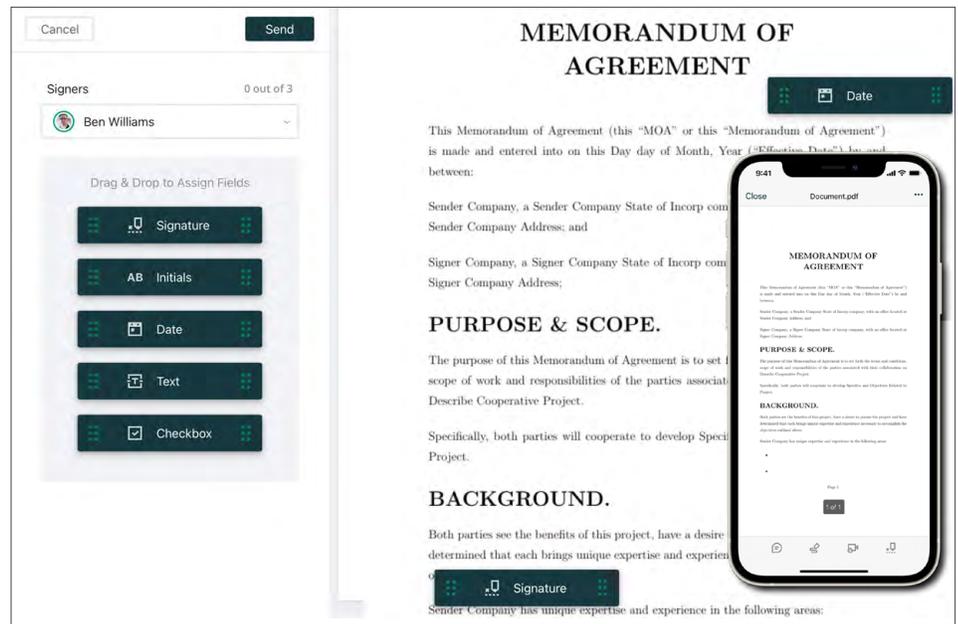
The Client Management Dashboard allows the firm to manage and streamline costs, productivity, and access all client interactions. Client interactions can have customized workflows that include triggers, mobile alerts, and notifications that allow the firm to manage KPIs by monitoring efficiency, cost, and quality.

The Control and Compliance Center includes the Admin Portal, where administrators can assign roles to team members and monitor all interactions via the detailed audit log.

Moxo provides seven reports out of the box, delivering metric-based information such as client engagement and coverage, internal user engagement, live support, request activity, and summary. These reports can be filtered by interaction type and time periods, presenting information on how the system is being used and by whom. Audit reports give a detailed account of every interaction in the system.

**Integration**

Currently, Moxo integrates with Dropbox, Google Drive, Box, and One Drive document repositories. Integration with external document management systems is under development. Integration with external document systems is available with custom packages, allowing users to



**Figure 3:** Moxo Workflow enforces task dependency to ensure consistency and attention to detail. An example of this can be seen here from the e-sign mobile application.

create integration with applications specific to their needs.

### Pricing

Moxo has monthly and annual pricing options based on using the starter app or the private label business app. In addition to the pricing below, custom pricing is available. *See chart below.*

### Who is Moxo?

Moxo's OneStop Client Hub features a suite of secure collaborative capabilities, delivered in an app. In-app features include text, voice and video messaging, document collaboration, video meetings, digital signature, storage, and more—

helping firms retain and grow clients, manage their operations, and lower costs for doing business.

With deep roots in business collaboration and engagement, Moxo was co-founded in 2012 by Subrah Iyar, WebEx founder and former CEO, and Stanley Huang, former WebEx senior director of engineering. Moxo headquarters are in Cupertino, California, with offices in London, New York, Amsterdam, Bengaluru, Shanghai, and Singapore.

### Why Buy Moxo?

- Create workspaces for each case, streamline client onboarding, billing

transactions, and case workflows, store persistent client records, and manage your practice with full visibility into all digital interactions.

- Mobile and web apps are intuitive and provide complete access to a matter.
- Customizable workflows with task-dependency encourage consistency and defensibility.

### Learn More About Moxo Today!

Learn more about enabling a OneStop Client Interaction Hub for your business and follow the company on [LinkedIn](#), [Twitter](#), and [Instagram](#). Or [schedule a demo today!](#)

Starter App (Moxo Branded)	Business App, Private-Label
One-time \$300 set-up fee and billed \$120/month or \$1,200/year	One-time \$1,500 set-up fee and billed \$450/month or \$4,800/year
<ul style="list-style-type: none"><li>• 10 users, supporting basic customer interaction workflows</li><li>• Contains complete collaboration suite, including, but not limited to messaging, document exchange, virtual meetings, and task management</li></ul>	<ul style="list-style-type: none"><li>• 10 users, supporting basic customer interaction workflows</li><li>• Contains complete collaboration suite, including, but not limited to messaging, document exchange, virtual meetings, and task management</li><li>• Scalable user-based capacity</li><li>• Reporting and auditing</li><li>• Integrations</li><li>• Customizable workflows</li><li>• Private cloud or on-premises</li></ul>



# MyCase Lets You Do More of What Matters with All-in-One Law Practice Management Software for Small and Midsize Law Firms in All Practice Areas

**“** In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management.”

**Company Name Brand**  
MyCase, Inc.

**Product Name Brand(s)**  
MyCase, MyCase Payments, MyCase Websites

### Latest Developments and Updates

- Mailchimp integration to automate leads and retain new clients.
- Smith.ai integration for telephone receptionist support and messaging.
- Communicate with staff using secure, internal chat.
- The new contact report, which uses customized columnar data and filters, paves the way for full custom reporting.

### Roadmap Development

- Integrate with Zoom to schedule online meetings.
- Integrate with telephone messaging service, LEX Reception.
- Synchronize cloud-based documents on the desktop using [MyCase Drive](#).
- Offer an in-house accounting suite, [MyCase Accounting](#), with three-way reconciliation for expense, operating, and trust accounts.

### Manage Your Firm with Increased Efficiency

All-in-one legal practice management (LPM) software, like MyCase, provides efficiencies and time-saving opportunities for busy small and midsize law firms. The company's software-as-a-service (SaaS) platform manages law firm financials, operations, and practices from generating leads and client intake to case management, time and billing, and payment processing. MyCase includes case, calendar, contact, and document management and automation with advanced communication and collaboration tools. Also available are time and billing features, lead tracking, intake forms, client portals, and reporting. MyCase drives product advancement through in-house feature development and offers unlimited data storage to support your firm's growth.

### Modern User Interface

MyCase continuously updates its user interface to maximize efficiency. The dashboard presents card-based visuals of financial overviews, open cases, recent activities, and a linear graph of leads generated over time. Dashboards include

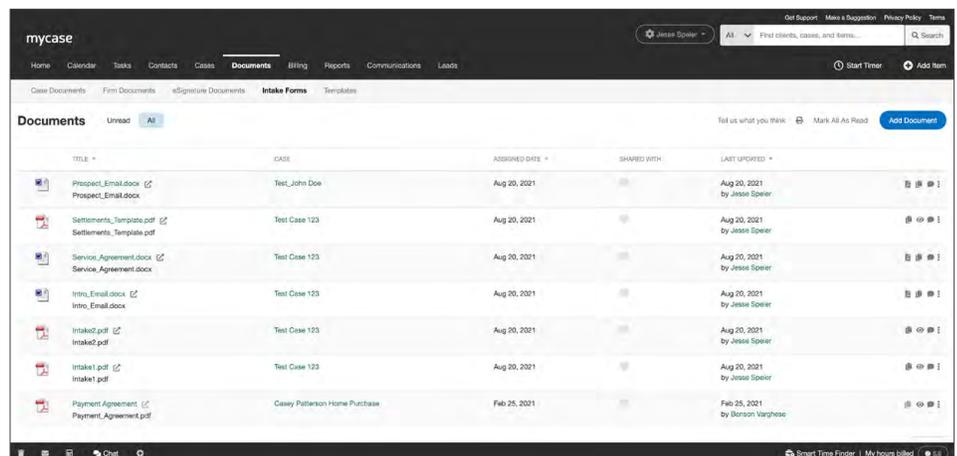


Figure 1: MyCase's user interface for cloud-based document storage.

user tasks, events, alerts, and communications, including email and SMS texts. A persistent top panel navigates users to primary functions, including matters, contacts, calendars, tasks, and documents. The panel includes a global search window and a facility to add new information, including leads, contacts, tasks, events, documents, time and expense entries, invoices, and messages.

### Lead Management

Most cases begin with a client lead. MyCase has a built-in feature to create and track leads until they become clients. Alternatively, if the client does not yet retain the firm, the information can be maintained for conflict or compliance purposes.

A firm can generate leads using intake forms and embed contact forms onto the firm's website using iFrame. They also have a service to build your website with all of these key integrations directly into MyCase. To help convert prospects into clients, [MyCase Websites](#) offers a customized site with optimized design, MyCase workflow integration, and search engine optimization (SEO). Lead tracking includes information on potential case details, communication, and the ability to accept payments for new client consultations. You can also save calendar events, documents, tasks, and more.

If you need to manage referrals, you can use lead tracking functions or adapt the process and improve your firm's workflows with custom fields. MyCase allows unlimited custom fields to track, manage, and report discrete data.

In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management. If the firm has an account with MailChimp to manage marketing channels and leads, MyCase can automatically synchronize lead and contact information to the case management dashboard in MyCase.

The communication features for lead tracking and case management include centralized two-way text messaging that can be retrieved and replied to on Apple iOS and Google Android devices using MyCase mobile apps. Whatever you can do on the web, you can do on mobile devices, with the exception of batching and sending bills.

Communication features include call logs, which record telephone messages entered by staff or an outsourced service, such as Smith.ai. MyCase supports secure real-time internal chat with staff and communications with clients via secure web portals. The software has a built-in mailbox feature to mirror users' email in the MyCase UI, so users can send and receive mail as if they were in their native email application, and then save messages within MyCase.

### Case and Document Management

The *raison d'être* of an LPM is case management. In MyCase, the function includes unlimited storage for document management and automation along with in-depth time and billing features. Additional aspects include status updates, related contacts, staff assignments, and case communications, such as email, texting, and call logs.

MyCase's document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents. Send retainers to a potential client for signature using the company's built-in eSignature feature. The e-sign function in MyCase supports multiple signers with a firm countersign.

Email an agreement to a client to sign using a drawn signature or text. The e-sign process transforms a Word document to PDF. From there you can insert text and signature fields to complete. When the deal is finalized, it's automatically stored in

your firm's case documents.

A user can create documents on their PC in the word processing software of their choice. When they upload it to MyCase, it becomes part of the case record. Open the document to edit, and changes are saved to the cloud with version support. MyCase is currently developing a MyCase Drive that synchronizes desktop documents with cloud-based storage, similar to Microsoft OneDrive and Google Drive (GDriveFS). See [Figure 1 on the previous page](#).

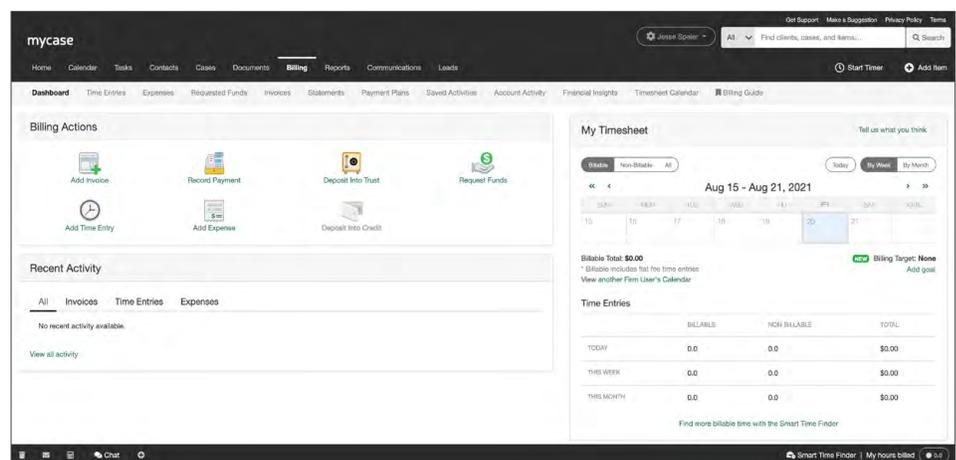
### Time and Billing

Time tracked on your computer and mobile apps accrues to the time and billing section of the appropriate case to await invoicing. MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees.

MyCase supports batch invoicing and the application of trust funds and credit card payments. MyCase Payments supports automated check handling (ACH) and credit card processing. Although there is no extra charge for ACH, there is a processing fee for credit card transactions. See [Figure 2](#).

### Reporting

Select from many standard reports to detail firm financials, productivity, contacts, and lead information. Financial statements include aged invoices, accounts receivable, fee allocations, case revenue, trust accounts, and electronic payments with credit card fees and payouts. Contact reports display case lists and the applicable statute of limitations. Lead information



**Figure 2:** MyCase's time and billing page allows law firms control of their financial health.

“MyCase’s document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents.”

“MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees.”

shows their forecasted pipeline value, referral sources, and revenue from consultations.

MyCase is developing custom reporting, which takes standard reports and applies filters for date ranges, client, case, lead attorney, and more. For example, customize a new contact report by selecting columnar data for address and birthdate, and filter them by contact type (lead, client). Export reports to PDF or CSV, save any results to rerun on-demand and refresh the data with just one click. See *Figure 3*.

### Integration

MyCase also integrates with software tools used by many law firms. MyCase synchronizes data with Google and Microsoft 365 calendars and integrates with Intuit QuickBooks online, CalendarRules, Mailchimp, DropBox, and Smith.ai. Later this year, the company will add integrations with Zoom to schedule online meetings and LEX Reception for legal call reception and messaging.

### Pricing

All features, including lead management, billing, and MyCase Payments, are available for one low price of \$49 per user per month billed annually or \$59 per user per month billed monthly.

### Who is MyCase?

Founded in 2010, California-based MyCase offers small and midsize law firms integrated law practice management software as a service. The company's

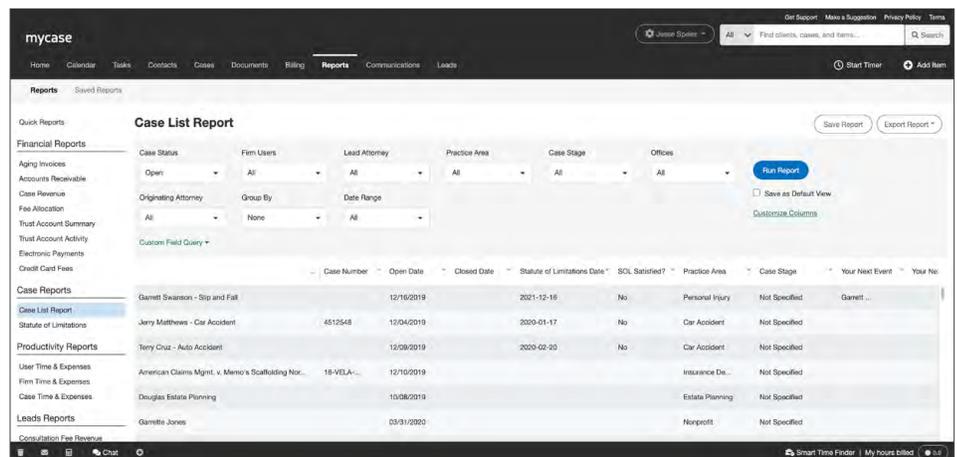
all-in-one LPM feature set aims to help law firms become more efficient and productive as well as improve the client experience. Led by **Chief Executive Officer Jim McGinnis**, along with Apax Partners, MyCase continues to grow, innovate its software, and increase its integrations with other legal product offerings. It recently acquired Soluno, a cloud-based accounting system, CASEpeer, law practice management software for personal injury practices, and Woodpecker, Microsoft Word-based legal document automation software. The company has a dedicated development team in San Diego with marketing, sales, and support teams in Santa Barbara.

### Why Buy MyCase?

- Anyone in the law firm can find value in MyCase's intuitive interface and easy-to-learn features.
- MyCase keeps all vital case information in a single, organized, cloud-based location, accessible 24x7 from anywhere, anytime, via web and mobile apps.
- The all-in-one legal practice management software manages the entire lifecycle of cases for a predictable monthly subscription—no long-term commitment required.
- MyCase meets customer demands with organic growth, targeted integrations, and strategic acquisitions.

### Try MyCase Today!

Start your **free MyCase trial** today.



**Figure 3:** MyCase's standard and customized reporting tools chart paths for law firm productivity and prosperity.

# Needles Neos

Neos Can be Precisely Customized to Help Your Firm Improve Case Results While Increasing Efficiency and Profitability

“ Documents are fully searchable with version control, and users can filter by type, category, and more. Firms can create templates for document assembly to generate documents automatically, ensuring consistency and saving time.”

**Company Name Brand**  
Assembly Legal

**Product Name Brand**  
Neos

### Latest Developments and Updates

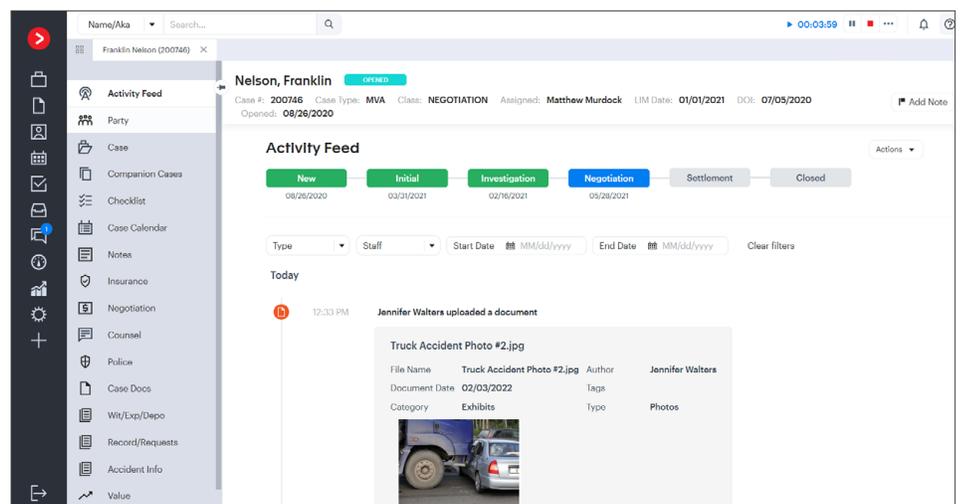
- Intake Pro module is a fully native solution built only for Neos customers resulting in a seamless transition from intake to case. Intake Pro features a dynamic intake, required fields, stage and statuses, checklists, and triggers.
- Neos Automatic Timekeeper starts and stops automatically when a user opens a case, minimizing the time required to record billable time.
- Automations: Neos Intake Pro features dynamic intake forms that instantly adapt based on responses and predefined rules you control. Automated document generation lets you send documents via email and DocuSign, as well as generate referrals and rejections with the click of a button.

### Collaboration and Workflow

Neos provides end-to-end case management and allows users to work anywhere, on any device. Built on Microsoft Azure cloud, Neos is 100% web-based and includes two-factor authentication (2FA) to ensure a secure environment, with live redundancy and 99% uptime. Legal teams can find all communications for a case and keep track of essential dates and task lists in one place. Neos has designed this intuitive platform to streamline workflows for law firms and legal teams.

### Navigating the System

An action bar at the top provides quick access from commonly used functions including search, notifications, a timer, and the knowledge base. Icons along the left panel allow a user to move through the platform, including the [activity feed](#), notifications, cases, documents, contacts, calendar, and task lists. As a user selects an icon, relevant options become available immediately to the right. The program



**Figure 1:** The Activity Feed is a chronological history of everything that has happened with a case. Whenever someone completes a checklist item, creates a note, or uploads a document, team members will see an entry on the feed, providing a full audit trail. Users can interact with items by clicking View and filter the feed by activity type, staff, or date.

“ Neos is light years better than any other online platform that I’ve seen—and I did all my due diligence on everything else—and it is technically superior.”

**Matt Schad**  
Schad & Schad

opens tabs as the user navigates through the system, remaining open until the user closes them. A user can have as many tabs open as they want, making it easy to move around the system. Each screen remembers how you left it and provides filter options relevant to that screen. Common throughout the program, Neos has a collapsible field chooser permitting users to select/deselect fields available in a view. *See Figure 1 on the previous page.*

The notification icon will provide a list of all notes that are sent directly to or mention a user. Each notification is clickable, and the user is taken to the note to respond. The search icon offers global search and displays results as the user types, which you can then filter. The briefcase icon displays a list of all matters in the system. If a user has filtered matters to a specific type, the next time they click on that screen, matters will show that filtered display. The contact icon displays a list of contacts in the platform, and firms can customize what information is shown. The system is highly interactive and allows users to click on a phone number for a contact and place a call directly or even send an [SMS/text message](#).

Neos has a fully contained [document management system](#), accessible from the document icon, with all necessary functionality for a law firm. Documents are fully searchable with version control, and users can filter by type, category, and more. Firms can create templates for document assembly to generate documents automatically, ensuring consistency and saving time. Neos supports multiple document generation, allowing users to

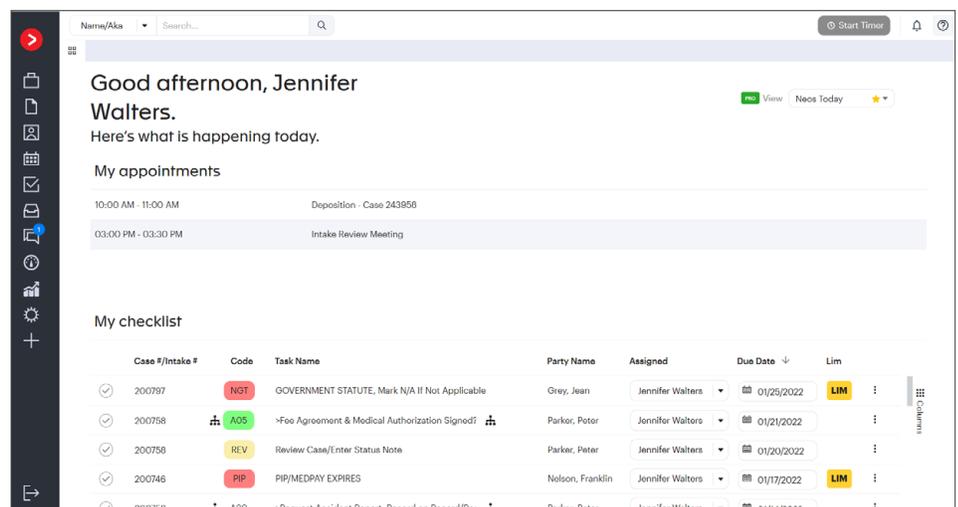
create the same letter for multiple parties. Neos integrates with DocuSign, giving firms a secure method for sending documents to clients and third parties for signatures.

### Intake Pro

Intake is the starting point of every matter. [Intake Pro](#), brand new as of the fourth quarter of 2021, is a fully native and customizable system to manage leads and start new matters. When a user clicks on the intake icon, all current live intakes are displayed in the screen’s main body. The intake process starts with a customizable and [dynamic intake questionnaire](#), allowing users to collect information critical to specific types of cases. As the information is entered, a user will be asked related questions. Intakes can come from anywhere, so Neos integrates with Zapier to support connection between web forms, chat bots, emails, and more directly into the system. Neos has incorporated checklists with triggers and actions into Intake Pro. Checklists are developed by the firm for each case type, identifying tasks needed for each step of the case. When creating a matter, all required tasks are set up automatically, streamlining the intake process as well as how the case is handled.

### Neos Today — Scheduling and To-Dos

The Neos Today screen is designed to give users a snapshot of their schedules and to-do lists. There are two sections to the screen: My Appointments and My Checklist. My Appointments lists appointments from a user’s Outlook account through integration that provides real-time synchronization with their calendar. Additionally, a user will see their



**Figure 2:** The Neos Today screen gives users a snapshot of their day. A user will see their checklists and their appointments synchronized with Outlook.

“ I can’t say enough good things about Neos. We received great support and training and the data and document transfer went flawlessly.”

**Sunny Vongtip**

Ketterman Rowland & Westlund

My Checklist summary which shows all tasks specific to that case. My Checklist on the Neos Today page is similar but displays a list of tasks assigned to a user, showing the task name, matter, due date, and more. Neos supports task dependency and displays a hierarchy tree icon you can click to show sub-tasks. *See Figure 2 on the previous page.*

### Dashboards and Reports

Dashboards are a simplified way to view data in Neos, presenting information and metrics that a firm wants to monitor. Dashboards are fully customizable, allowing each user to create and modify dashboards useful to them. Each visualization has clickable data points that allow a user to access the underlying data. *See Figure 3.*

Neos provides a powerful reporting tool, delivering hundreds of pre-designed reports, giving users access to the information needed to handle their matters. Reports are easily customizable through filtering, sorting, and rearranging. Reports offer a subscription option with regular delivery to the team or outside the firm, and you can export them to Excel or PDF. Advanced Search is an easy-to-use custom report writer with a query builder where you can save any of the reports you’ve built to use again.

### Integrations

Neos has integrations with Zapier, DocuSign, QuickBooks, Lexitas (automated medical record collections), Scorpion, CasePulse, and O365, which relies on a firm’s O365 license and works with desktop or web applications.

### Pricing

Neos has entry-point pricing as low as \$85 per user. Depending on the configurations and add-ons, like the Neos Intake Pro module, price per user goes up. Contact Neos to find out more.

### Who is Assembly Legal?

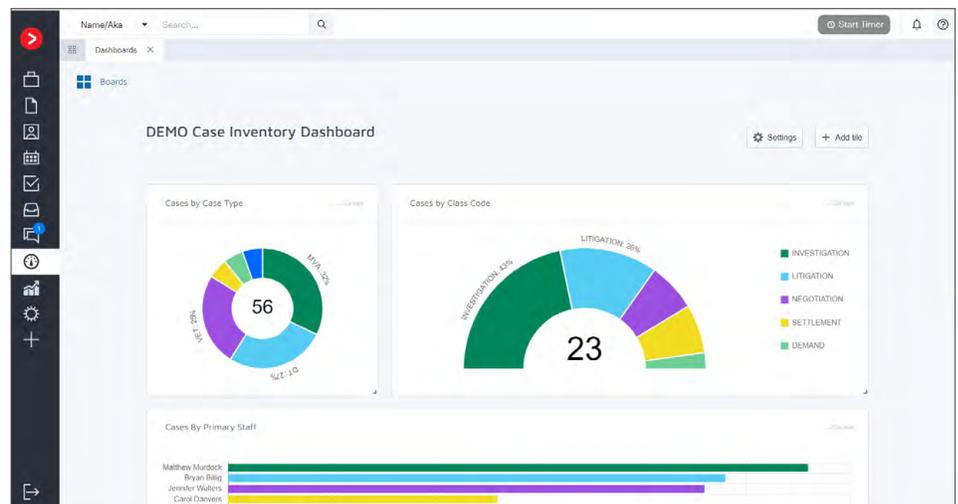
Over 40,000 professionals in the legal business rely on Assembly Legal’s products to power their firms. Their flagship cloud-based platform, Neos, configures precisely to a firm’s needs with its case checklist, document management, and analytics features. Assembly’s brands include Needles, Neos, Trialworks, and Neos Intake Pro.

### Why Buy Neos?

- Neos is powered by Microsoft Azure, providing legal teams the benefit of security and speed.
- Available anywhere you have an internet connection and on any device.
- Automated checklist customized for each staff member, providing an assembly line of tasks within cases.
- Simple conversion of data, templates, and files—whether coming from another Assembly software system or a competitive solution.
- 96% customer satisfaction rate and an award-winning self-service portal filled with answers to common support questions, videos, and webinars.

### Schedule a Neos Demo Today!

For an expert-led [one-on-one demo of Neos](#), contact Assembly Legal today.



**Figure 3:** Dashboards can be modified easily by drag and drop or by resizing each tile. A user can access predefined dashboards or create new ones.

# All-in-One Legal Practice Management Platform PracticePanther Continues Growth While Maintaining Ease of Use for Managing Complex Matters

“ PracticePanther can apply role-based security permissions to allow users to access specific features and data. For example, if a user does not need to review firm financial data on their dashboard, turn off the reports for non-managers.”

**Company Name Brand(s)**  
Paradigm

**Product Name Brand(s)**  
PracticePanther

**Latest Developments and Updates**

- Insert payment links into websites, email, and text messages.
- Unlimited use of electronic signatures, built into the software.
- Natively send and receive SMS/text messages between clients and the law firm.
- Send payment links to clients via SMS/text with one click.

**Extensive and Comprehensive Practice Management**

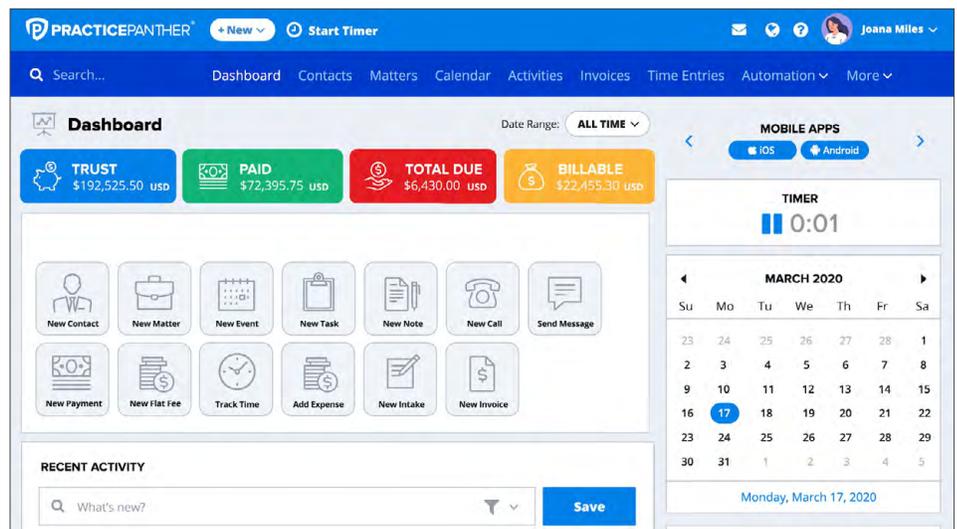
PracticePanther legal practice management (LPM) software-as-a-service (SaaS) aims to make the most user-friendly experience for lawyers to manage their business. With one click, you can get more done in less time, and start any action or task easily.

**Getting Started**

The top bar of the PracticePanther user interface (UI) persists throughout the use of the program, and a New button lets you take any action in PracticePanther. From there, you can start a time entry and create new objects, such as a contact, matter, task, event, workflow, payment, payment plan, expense, invoice, document template, intake form, or text message. You can also log a call or send a document for electronic signatures with the **built-in eSignature feature**.

When you first log in to PracticePanther, the dashboard displays the law firm's financial details for trusts, paid invoices, due invoices, and billable records in your pipeline not invoiced. See *Figure 1*.

Users never lose sight of the right-side panel that displays their timers, tasks, and calendar. PracticePanther shows everything you need to do in one HTML page, no matter how long or complex, to



**Figure 1:** PracticePanther dashboard displays a law firm's financial details with intuitive buttons to create new information and display user information, including calendar events, time entries, and recent activity.

“ Select a client and matter to apply a template and generate a document to download or send to a client, court, or third party, directly from PracticePanther. There are no limits to the number of documents you can send for electronic signatures from the platform's document management system (DMS).”

“ PracticePanther combines everything into one package that is reliable, inexpensive, and has added value to our firm's clients through its bottom line.”

Eli T. Marchbanks, Esq.  
Counsel Attorney at  
Navigate Law Group

avoid losing context and traversing to another page.

PracticePanther can apply role-based security permissions to allow users to access specific features and data. For example, if a user does not need to review firm financial data on their dashboard, turn off the reports for non-managers.

#### Contacts, Calendars, and Communication

Open a new contact, and all the usual fields become available to input data, including name, address, phone, and information on a relevant matter. Tag the contact for easy retrieval and reporting and add custom fields on the fly, right from the contact form. You can add custom fields from most data input screens and group custom fields to associate them with case types. This helps streamline new client and matter intake forms, which can be embedded on the firm's website or sent to a client to complete.

User calendars can integrate court rules and deadlines from LawToolBox and sync events to Microsoft Outlook, Google Calendar, and Microsoft Exchange. Configure and automatically send calendar reminders to clients via pop-ups in the program, email, or SMS/text. PracticePanther also allows you to send and receive SMS/texts between the client and the law firm using the web interface

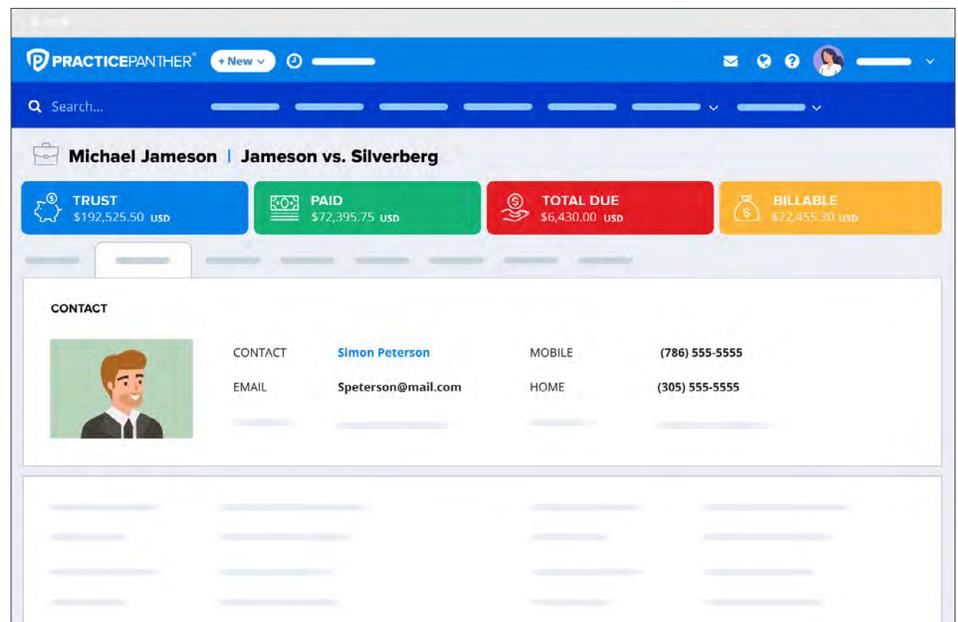
and mobile devices that run Apple iOS and Google Android.

PracticePanther's **native two-way text messaging** feature tracks and stores all messages and files, allowing firms to keep accurate and complete client communication records. In addition to texting clients, you can securely chat with staff on the web app, which associates a green dot for logged-in users. The secure chat is not currently available on mobile devices.

#### Document Templates

PracticePanther makes it easy to create, use, and reuse templates for any document or form, such as an intake form or court document. You can bring up a list of standard and custom fields to insert into documents and merge the associated data using intuitive codes, such as #Contact, Email# and #Contact.Website#. Copy the codes and paste them into templates.

Select a client and matter to apply a template and generate a document to download or send to a client, court, or third party, directly from PracticePanther. There are no limits to the number of documents you can send for electronic signatures from the platform's document management system (DMS). The DMS can integrate with third-party, online storage providers such as Box, Dropbox, Google Drive, and Microsoft OneDrive.



**Figure 2:** PracticePanther's matter UI displays trust, paid invoices, due invoices, and billable invoices across the top with tabs to display contacts, activities, notes, messages, invoices, payments, eSignatures, time entries, and more on dedicated pages.

When you select a matter to review, the New button on the page provides context-sensitive functionality to create and manage a case, including the ability to generate court rules and apply workflows and templates. See *Figure 2 on the previous page*.

PracticePanther makes it easy to build workflows and apply them to cases. Apply a workflow, set a trigger, and assign tasks and subtasks to staff. Workflows support conditional logic and automatically update deadlines for changed or missed events.

### Time and Billing

Start and run multiple timers from any page in PracticePanther. Use numerous timers and switch your attention among them. The most current timer is active, pausing others. If you lose connection with the website, a timer runs until you stop it. Time entries support American Bar Association task codes and codes for the Legal Electronic Data Exchange Standard to support LEDES billing.

**PracticePanther** lets you enter multiple time entries and record them all in one click. This time-saving feature works for timekeepers who forget to record numerous time slips or hand them off to staff to enter the data. See *Figure 3*.

PracticePanther supports payment plans and trust accounting and includes a built-in payment processor, PantherPayments, to process clients' electronic payments by credit card or electronic check. You can manage multiple trusts and operating accounts and automatically pay invoices from client trusts. PantherPayments is available to activate on any plan with PracticePanther for free and features transparent and industry-low transaction processing fees. There are no hidden costs as transaction fees for credit cards are 2.8% regardless of card type (unlike other processors), and 1% for eChecks.

Batch and send invoices with secure payment links and payment reminders via email or text message. Invoices show trust account activities and balances, expenses, time entries, and timekeeper totals. Regardless of the method used to send the invoice, PracticePanther can alert you via email or SMS/text every time a client views an invoice.

PracticePanther reports all data necessary to keep a firm profitable and productive. Standard reports include electronic

payments, invoices, contacts, and productivity data. Export any report to Microsoft Excel or PDF format.

### Integrations

PracticePanther integrates with automation software, including Lawmatics, Wealth Counsel, and Zapier. It works with Microsoft Outlook and Google Gmail. The PracticePanther calendar syncs with Outlook, Google Calendar, and Microsoft Exchange, and integrates with LawToolBox. Document storage support includes Box, Dropbox, Google Drive, and Microsoft OneDrive.

### Pricing

PracticePanther offers **three pricing options**: Solo, Essential, and Business, priced at \$39, \$59, and \$79 per user per month (billed annually), respectively. Each option includes **PantherPayments**, contact and matter management, billable time and expense tracking, secure client portals, document templates, task and event workflows, trust account ledger and reconciliation, unlimited data storage, internal chat, real-time notifications, daily agenda email, and mobile apps for Apple iOS and Google Android. The Essentials package adds custom fields, security roles, invoice read alerts, automated payment reminders, recurring payment plans, batch time entries, expenses, and billing, and support for multiple bank accounts. The Business package includes Essential features and includes native two-way texting, intake forms, unlimited electronic signatures, support for LEDES billing, free data migration, and more.

### Who is PracticePanther?

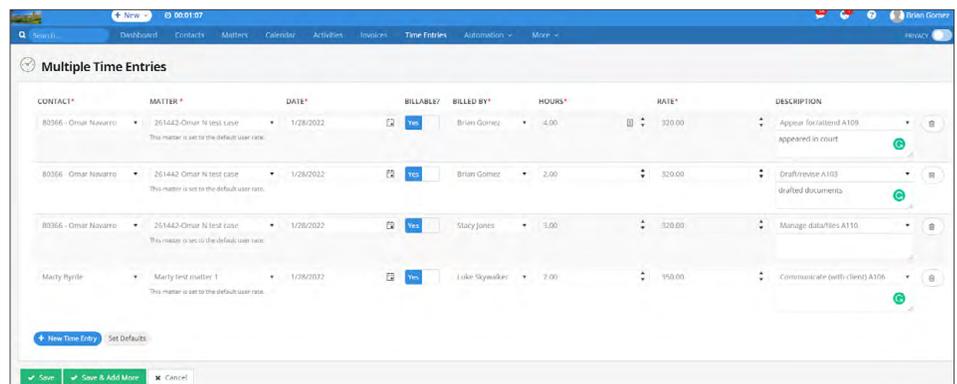
PracticePanther is a legal practice management software solution. Founded in 2012, the company has grown at unprecedented rates and now serves tens of thousands of customers in 170 countries. The company's SaaS solution is designed to be the most robust, intuitive, and user-friendly software for law firms. PracticePanther's mission is to make the lives of lawyers and paralegals easier. PracticePanther is a part of Paradigm, which offers a suite of legal software solutions that help lawyers manage, automate, and grow their firms.

### Why Buy PracticePanther?

- All-in-one software with an intuitive, user-friendly interface to manage complex matters.
- Built-in payments processing through PantherPayments, offering industry-low transaction rates and 100% compliance with IOLTA, ABA, and lawyers' online payment rules in all 50 states.
- Send unlimited documents to clients and third parties for electronic signatures.
- Send and receive SMS/texts to and from clients using a web browser or mobile apps.
- Print checks and send clients payment reminders.
- Business plans offer VIP migration support.

### Try PracticePanther Today!

**Get a demo** and 10% off the 1st year of our Business Plan.



**Figure 3:** PracticePanther's support to enter numerous time slips and simultaneously record them saves time, improves rate realization, and leads to more accurate billing statements.



# Rocket Matter Delivers Automated Billing, Business Intelligence, Granular Security Controls, and More to Keep Law Firms Secure and Prosperous

“ You can share invoices via email and client portals, and clients can securely pay via credit card or electronic check (ECH) with Rocket Matter Pay.”

**Company Name Brand**  
Rocket Matter, LLC

**Product Name Brand(s)**  
Rocket Matter, Rocket Matter Pay

- Latest Developments and Updates**
- Apply granular permissions to features, functions, and content.
  - Automate prebills to review, edit, and make changes.
  - Use matter-based trust accounts in addition to client trusts.
  - E-signing documents in workflows to retain and represent clients.
  - [Support for Legal Electronic Data Exchange Standard \(LEDES\).](#)

**Comprehensive Practice Management**  
Rocket Matter is a practice management software-as-a-service (SaaS) provider. The cloud-based software has three feature-based product offerings: Essentials, Pro, and Premier.

Essentials offers matter management, time and billing, online payments, trust accounting, conflict checks, document storage, contacts, and calendaring. Pro includes Essential features and adds advanced customizations, matter templates, document assembly, client portals, integration with Outlook and QuickBooks, and advanced billing with interest, discount, and tax calculations. Premier builds onto Essential and Pro features, including role permissions, insurance defense, intake, paperless prebills, automated billing, and the Business Intelligence module.

**Easily See Information that Matters**  
The Rocket Matter user interface (UI) works in any modern web browser. It has persistent top and left-hand navigation to add new objects, start time records, and access resources and tools to manage the business and practice of law. See Figure 1.

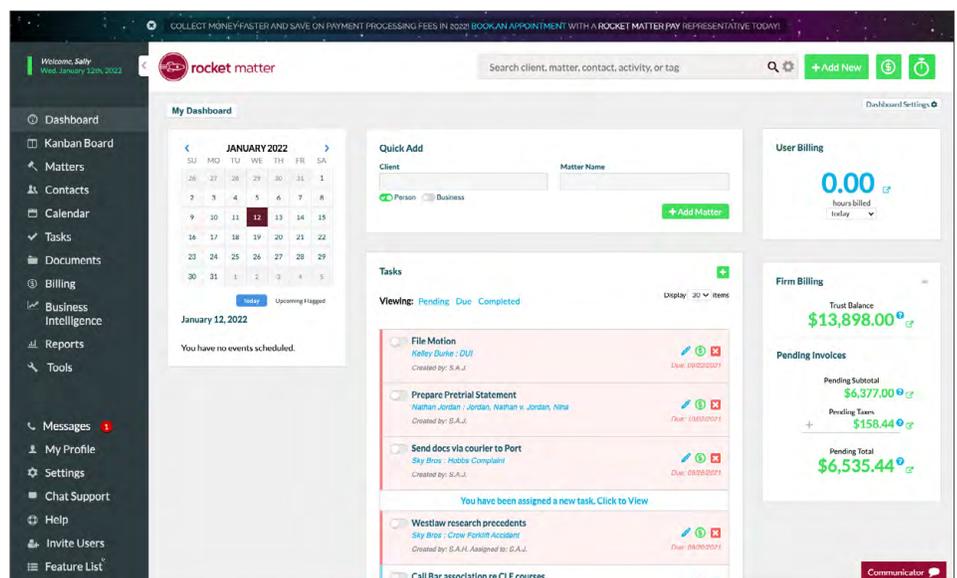


Figure 1: Rocket Matter configurable user dashboard.

“ Develop any number of case templates and apply them to cases to automatically generate tasks and staff assignments, create trust accounts, and populate the matter with custom fields. Templates can also fix the case type, billing preferences, and workflow processes.”

“ Enter custom task codes and LEDES codes when you add billable time. Rocket Matter can warn users when time slips do not include required LEDES codes for insurance defense teams and other practice areas.”

The matter view in the Rocket Matter UI includes a Matter Stream, or feed, like on Facebook, which gives a detailed list of all actions done on the matter. Users can subscribe to a matter feed and receive updates via email to identify and quickly catch up on the work performed for a client and what work remains.

Synchronization with Office 365 and Google Gmail makes it easy for users to push emails and attachments into Rocket Matter with recorded time attached. Also, users can track their time in Microsoft Word on the desktop or online.

Rocket Matter recently added the ability to manage roles and set granular permissions for users to access features and content. Create roles, such as a senior or junior partner, and permit them to conduct administrative and user tasks, such as time and billing. You can even set user permissions to access LEDES task codes for billing purposes.

### Time and Billing

Rocket Matter understands the administrative burden of tracking time and billing clients, which takes away from the practice of law. The company offers many features to streamline time tracking and automate billing.

Time tracking and time entry are available in the web and Office 365 apps, including Outlook and Word. Enter custom task codes and LEDES codes when you add billable time. Rocket Matter can warn users when time slips do not include required LEDES codes for insurance defense teams and other practice areas.

You can share invoices via email and client portals, and clients can securely pay via credit card or electronic check (ECH) with Rocket Matter Pay. Some high-end billing features include holding fees and costs from invoices as well as placing holds on invoices with one click, and a report can easily be run to find all bills on hold. Apply fixed percentage discounts, convenience fees, and interest rules to invoices and debit trust accounts to pay current charges. Rocket Matter also supports client and matter-based trust accounting.

### Prebills and Billing

Users can draft prebills for review, generate invoices, run reports from the billing options page in matters, and set up prebills to run regularly. Automatically notify reviewers when prebills are ready to check, and they can make any necessary changes on Rocket Matter's prebill page. For example, reviewers can change rates, add neglected activities and time entries, apply discounts, and take bulk actions to approve, hold, download, print, and invoice clients. Users can also delete prebills, and the time is returned to the matter to add to future bills. With Rocket Matter's granular permissions, you can lock the prebill screen from edits by unauthorized users. See Figure 2.

Batch billing in Rocket Matter is easy. Select parameters to generate invoices using case types such as hourly pricing, flat fees, or contingency billing, and batch types such as matters with current charges, unpaid invoices, or charges of more than \$100. You can also use custom fields and date ranges to batch bills and focus on or exclude primary attorneys, originators, or specific matters. The billing options allow you to

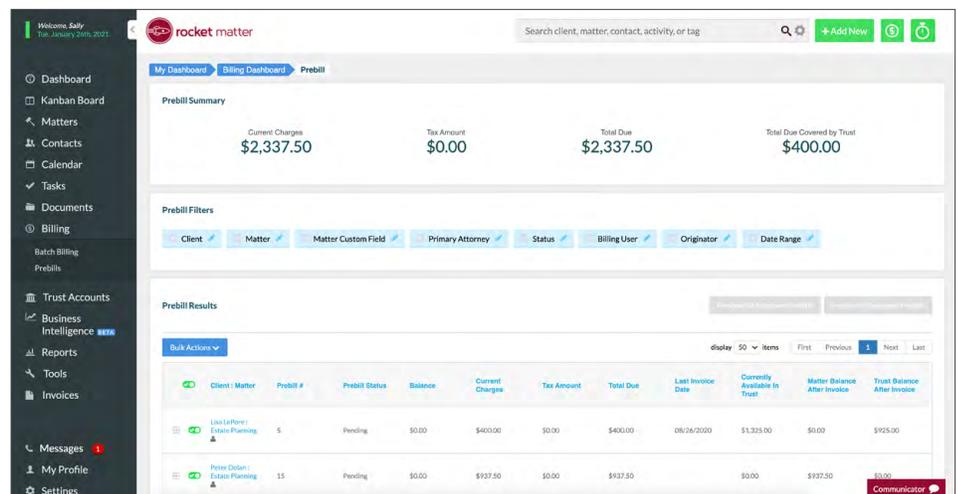


Figure 2: Rocket Matter prebills page to review invoices.

review, print, and email only the invoices you want. The software automatically saves them in PDF, Word, Excel, or LEDES format in the matter documents section. Save billing preferences in the client profile.

Summary reports of batched bills show invoices by matter to display balances, current charges, totals due, and trust balances after billing. You can run prebills from the summary or details report on batched bills, or generate invoices to mail or email.

Rocket Matter billing also supports audit rules for insurance defense practices and lets you set hourly billing limits to make matter budgets. And you don't have to leave Rocket Matter to get information on credit card processing. Run the Rocket Matter Pay Transaction History report and sort it by the client, matter, or date range.

### Business Intelligence

Users create custom reports in Rocket Matter with an easy-to-use **Business Intelligence tool**. The graphical UI makes it easy to build reports using a panel of five data sets and their available fields. Data sets include activities, contacts and clients, invoices, matter rates, and matters. Select a data set, and its fields come into view in the left panel, where you can drag and drop them onto the main page to filter and group data in columnar views. For example, select an invoice data set to configure an aged accounts receivable report. You can order the columns to display the client's name, matter name, invoice identification number, and more, along with the invoice age and category data, and filter by creation date. Click Run Report, and you can view a summary or detailed report online and export reports in Microsoft Excel format for further analysis. See *Figure 3*.

### Project Management

**Legal project management** in Rocket Matter starts when you set up and save a matter. The software creates a template that can be reused and edited on-demand, and changes accrue to existing cases with the same template. Develop any number of case templates and apply them to cases to automatically generate tasks and staff

assignments, create trust accounts, and populate the matter with custom fields. Templates can also fix the case type, billing preferences, and workflow processes.

View workflows in charts or Kanban boards, where you can drag and drop matters to update their status. Two drill-down reports on workflow identify workflow problems: View All Matters by Case Type and View Matters by Workflow Status. The status reports display case age and whether cases are in or out of scope or approaching their limits.

### Integration

Rocket Matter supports a free **Office 365 plugin** to track billable time, edit documents in Microsoft Word and PowerPoint, and save the information to Rocket Matter with versioning support. With the Outlook plugin, you can track time spent on email, synchronize Outlook contacts and calendars, and save emails and attachments directly to matters in Rocket Matter. You can also save documents and billing information from Word and PowerPoint to RocketMatter. Other integrations include Box, Dropbox, Evernote, QuickBooks Online, LawToolBox, Ruby Receptionist, and Smith.ai.

### Pricing

Rocket Matter sells its software direct using a predictable and competitive **subscription model**. Essentials, Pro, and Premier cost \$39, \$59, and \$89 per user per month annually, respectively.

### Who is Rocket Matter?

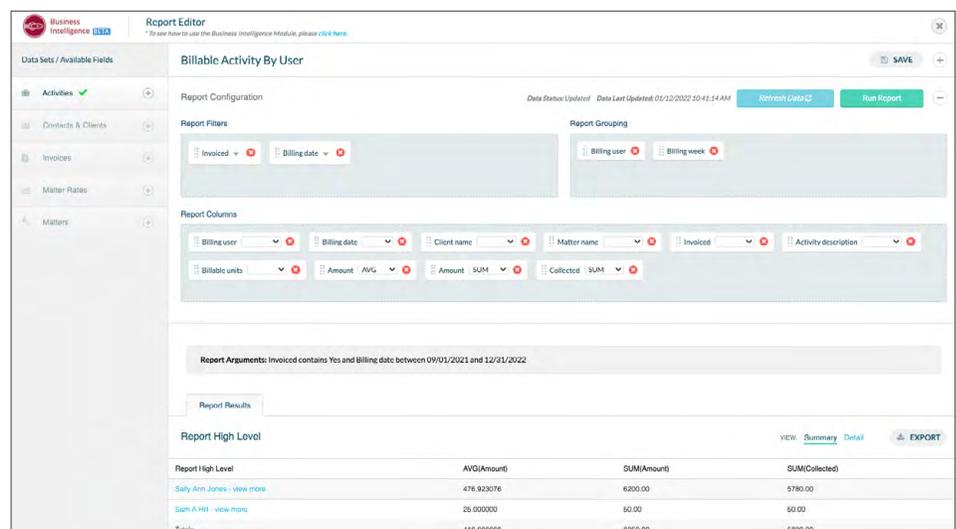
Rocket Matter is a cloud-based practice management, legal billing, and payment processing software provider located in Boca Raton, Florida. Since 2007, the company's eponymous software-as-a-service helps make law firms productive and profitable. In 2020, Lightyear Capital, a New York-based private equity firm, acquired Rocket Matter and other integrated billing, payment, and software service providers, including Tabs3, TimeSolv, and ImagineTime, through its subsidiary, ProfitSolv. Larry Port, Rocket Matter's CEO and founder, leads the company of more than 40 employees who support thousands of customers in the North American legal market.

### Why Buy Rocket Matter?

- Review and edit draft invoices as prebills to generate and deliver accurate billing statements to clients in their preferred format.
- Use the firm's business intelligence to customize reports to monitor and forecast revenue.
- Develop matter budgets and apply matter-based trusts.
- Use integrated e-signature and Rocket Matter Payment processes.

### Schedule Your Demo Today!

See how Rocket Matter is the ideal solution for firms with highly demanding billing needs. [Schedule your free demo today](#) to learn more!



**Figure 3:** Rocket Matter's Business Intelligence UI to customize reports.

# SmartAdvocate®

Get Smart About Organizing and Automating Your Personal Injury and Mass Tort Cases Complete with Intake, Document Management, and Reporting Functionality

“SmartAdvocate has all of the tools necessary to successfully operate a personal injury law firm with incredible efficiency. The ability to text and e-sign right from within the program is a game-changer in terms of client satisfaction. Ordering medical records is simplified to a few clicks, and tracking those requests is totally transparent.”

**Steve Malman**

President of Malman Law, Chicago

**Company Name Brand**  
SmartAdvocate LLC

**Product Name Brand**  
SmartAdvocate

### Annual Release Updates

- A new user interface (UI) supports fresh fonts, icons, and themes akin to MacOS and Office 365.
- Full-text search integrates with dtSearch.
- Dashboards and Reports are now fully customizable.
- Upgraded automation features add new triggers and actions, enhancing workflows.
- Share documents stored in SmartAdvocate with external users and log in with two-factor authentication.
- [See latest updates.](#)

### Raising Efficiency and Productivity

Wouldn't it be nice to use legal software designed by lawyers? If you're a personal injury or mass tort attorney, you need to look at SmartAdvocate. A plaintiff's

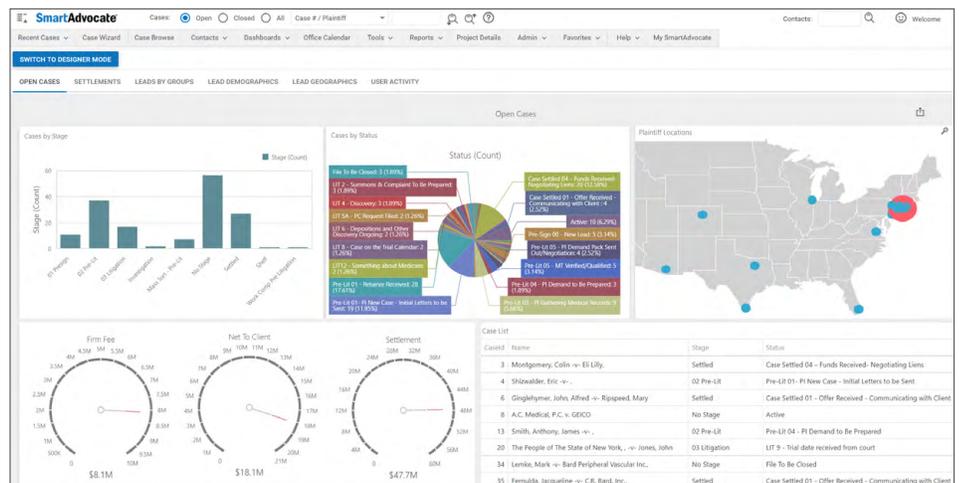
attorney developed it to provide reliable and comprehensive information on all aspects of a large number of cases.

SmartAdvocate aims to present as much information as possible, all on one screen. See party profiles, court activity, potential value, injuries, critical dates, status, and much more for multiple cases...all in a simple and user-friendly format that doesn't confuse or intimidate you or your team. Having access to all that information at your fingertips instills confidence and makes your firm more efficient and productive.

### Deployment Options

SmartAdvocate supports personal injury, mass tort, and other litigation practices such as Social Security disability and workers' compensation. Firms of all sizes, including solo practitioners, can take advantage of SmartAdvocate.

SmartAdvocate is available in both cloud (SmartAdvocate Cloud) and server-based



**Figure 1:** Your SmartAdvocate homepage can display assigned tasks, upcoming calendar appointments, critical deadlines, case lists, and customized dashboards. Click the Designer Mode button in the upper left-hand corner to choose which panels to display and resize and arrange panels as needed in the browser window.

“ SmartAdvocate’s new release has the capability to create completely custom dashboards. The Dashboard Designer allows users to build all types of dashboards with charts, graphs, and maps based on any data in the SmartAdvocate database, which translates into extensive reporting that fits any firm’s needs.”

“ One of SmartAdvocate’s latest updates is an integration with a full-text search engine, dtSearch, which allows users to search the contents of text documents, including PDFs that are OCR’ed.”

(SmartAdvocate Server) versions. Regardless of how you choose to host the software, individual users access the platform via a web browser, such as Google Chrome or Microsoft Edge, which means your data is available anywhere you have an Internet connection. That includes mobile devices using the SmartAdvocate app, compatible with iOS and Android devices.

### Powerful Dashboards

Upon logging in to SmartAdvocate, you land on a personalized home page with customizable dashboards and lists of assigned tasks, calendar dates, and other critical data to see everything you need.

With a right-click, you can work on any item in a dashboard or list view, such as setting or canceling a calendar item, creating a case task, or marking a task complete. You can filter information and choose the columns you need to display. SmartAdvocate remembers the last view of a dashboard or panel when you exit and return, regardless of the last device used. See Figure 1 on the previous page.

SmartAdvocate supports searchable timelines of all case activity and full-featured SQL reporting. It also includes plenty of standard dashboards essential to a firm’s litigation services.

SmartAdvocate’s new release has the capability to create completely custom dashboards. The Dashboard Designer allows users to build all types of dashboards with charts, graphs, and maps based on any

data in the SmartAdvocate database, which translates into extensive reporting that fits any firm’s needs.

### Search for Your Matter

Click a matter from a dashboard view of your most recent cases, or use the handy search box atop every browser window to search by case number or plaintiff’s name. SmartAdvocate now supports a full-text search integration with dtSearch.

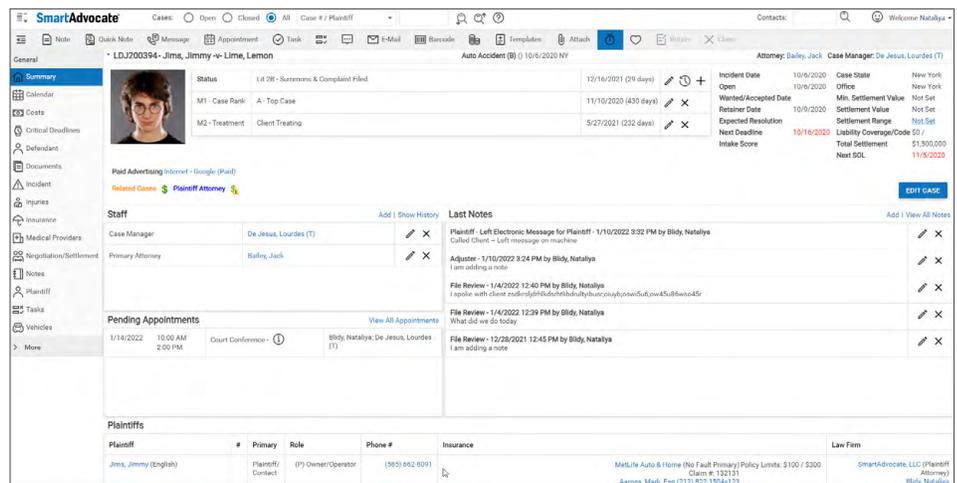
The quick-search box allows you to search text and numbers with wildcards in selected fields. Examples include claim number, incident date, court docket or index number, a client’s birthdate, email address, and Social Security or telephone number.

From the search results list, you can right-click on any case to add an appointment, note, task, telephone number, or message, and you can send an email or text. Quickly update a case without derailing your current focus. Select a matter to open it for a comprehensive view of all relevant case information. See Figure 2.

### Critical Case Information

If a case includes a critical note, a pop-up window displays that information—such as “don’t speak to the husband.” You can create a note, telephone message, appointment, task, or email with one click. You’re even able to start a timer for billing purposes to track the hours on a case.

Along the left side of the case’s Summary Screen is a detailed list of customizable



**Figure 2:** This SmartAdvocate view includes a summary of critical data, including the next deadline and applicable statute of limitations. Detailed information in panels lists the staff working on the matter, pending appointments, plaintiffs, critical deadlines, notes, tasks, and court and docket information.

menu items that allow the user to quickly navigate to specific pages in the case. The **matter calendar** even synchronizes with Microsoft Outlook. See *Figure 3*.

### Delightful Document Management

SmartAdvocate includes a full-featured Document Management System (DMS). You can view detailed, columnar metadata on case documents from a list view.

There are numerous ways to get documents into the DMS. SmartAdvocate includes an add-in for Microsoft Word to **create templates** for document assembly. You can easily embed any database field in the system in a document template. Once you've generated a document from a template using a client's directory information and case facts, it is automatically saved in the SmartAdvocate DMS. Drag and drop files from your desktop and scan documents with barcodes directly into the DMS for easy document transfer and tracking.

One of SmartAdvocate's latest updates is an integration with a full-text search engine, dtSearch, which allows users to search the contents of text documents, including PDFs that are OCR'd. SmartAdvocate automatically files emails sent from the system, which integrates with any SMTP mail server such as Microsoft Office 365, Exchange Server, or Gmail. SmartAdvocate also supports email templates that assemble standard text with client and case data. SmartAdvocate has a Microsoft Outlook add-in to save

messages and selected attachments in either the DMS or the case note section.

### Tracking Leads and Setting Up Cases

Case intake is done seamlessly in SmartAdvocate with the New Case Wizard. The wizard prompts you to get answers to required and conditional questions from a lead, track referrals and marketing campaigns, and calculate statutes of limitations. It allows you to manage leads like cases, but with special functions to follow up with leads after intake and send documents such as a client retainer. SmartAdvocate supports electronic signatures powered by AssureSign and DocuSign.

### Security and Integrations

SmartAdvocate supports customizable role-based permissions to access content. It includes automated procedures and work plans to design case management and a time-tracking function to create billable invoices. SmartAdvocate now integrates with online QuickBooks as well as Desktop, where you can push case costs and expenses for reporting, analysis, and billing.

**Other integrations** include CalendarRules, Message Media, National Record Retrieval, and RingCentral.

### Who is SmartAdvocate?

SmartAdvocate, based in Melville, New York, with an office in Bonita Springs, Florida, develops and distributes the eponymous personal injury (PI) case

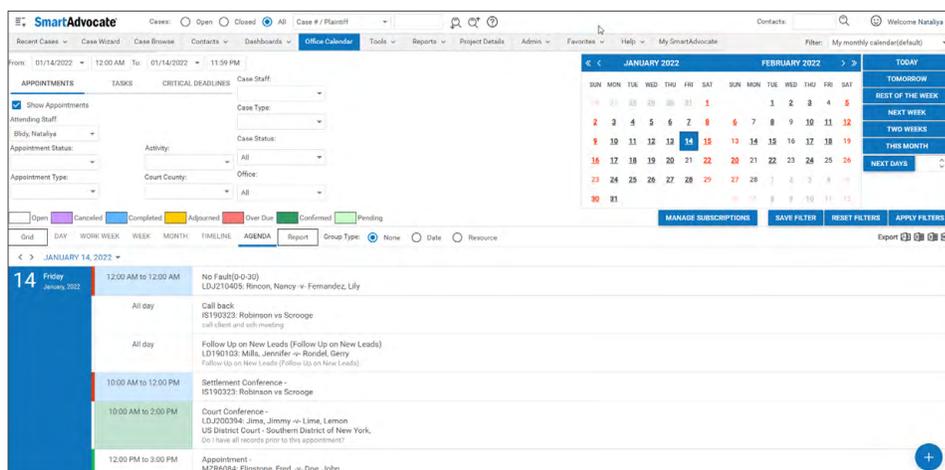
management software. Jerry S. Parker of Parker Waichman developed the software when he found no other product offering suitable features for plaintiff-side PI and mass tort law firms in addition to other firms with a litigation practice. Solo practitioners and law firms of all sizes throughout the US, Australia, and Canada use SmartAdvocate.

### Why Should You Consider SmartAdvocate?

- Browser-based case management with accessibility from virtually anywhere (server or cloud).
- Easily create document and email templates from the documents that your firm already uses with over 2,500 merge codes available.
- Keep track of critical case information, as well as vital firm financial and operational details, with dozens of dashboards and reports that can automatically be emailed to you.
- Provide clients with instant access to their case information, including documents, the case calendar, notes, and more with the SmartAdvocate Client Portal which frees up staff time for other responsibilities.

### Try SmartAdvocate Today!

Contact us today to bring the benefits of SmartAdvocate into your firm. Call 1-877-GET-SMART or connect at [www.smartadvocate.com](http://www.smartadvocate.com)



**Figure 3:** The SmartAdvocate Office Calendar, as well as the calendar reports provided, can display events for a single case, an individual, any group or department, or the entire office. Appointments, critical deadlines, and SOLs can be pushed to your Outlook calendar.

# ZOLA SUITE®

A to Z Practice Management that Covers Accounting, Matter, Email, Document, Task Management, and Reporting

“Immediately upon logging in to Zola, the initial screen for all users is a customizable dashboard. A user has the option to select widgets to enhance their workflows, such as accounting information, timekeeping, tasks, calendar, and email.”

**Company Name Brand**  
Zola Suite

**Product Name Brand**  
Zola Suite

### Latest Developments and Updates

- **Configurable dashboard:** a user can customize their dashboard page, selecting any available widgets.
- **Total Billings report:** a perfect complement to the Billed & Collected report; a user can view all billed fees and expenses grouped by matter in one comprehensive report.
- **AI-enabled OCR:** scan critical information from data tables, street signs, handwritten letters, and more into Zola Suite in a matter of seconds while eliminating manual entry.
- [See what's new with Zola Suite.](#)

### A Comprehensive Platform

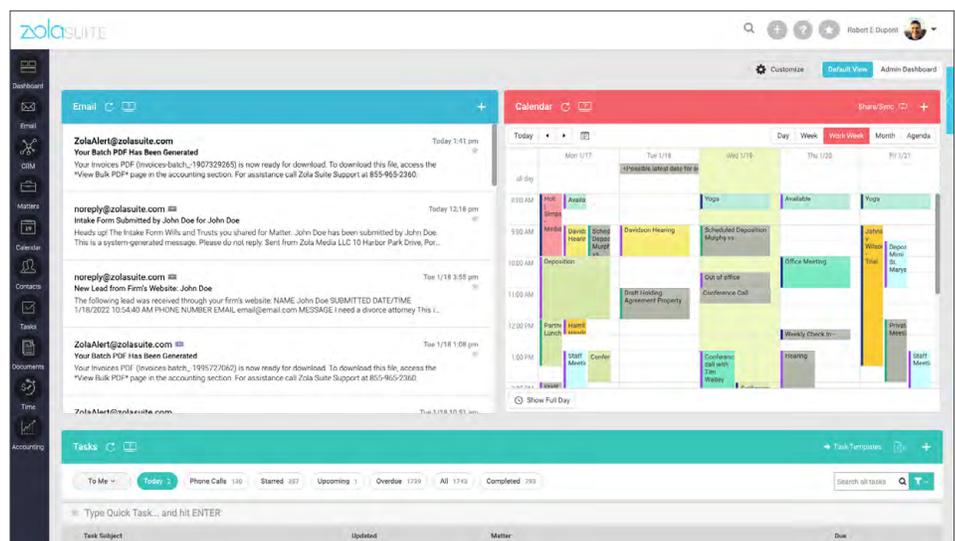
Zola Suite is growing, following the merger with AbacusNext, providing a robust

practice management tool for legal offices. The Zola platform provides one place for legal professionals to work, managing email, calendars, documents, tasks, notes, accounting information, and more.

### Navigation and Integrations

Navigation is intuitive and logical. Immediately upon logging in to Zola, the initial screen for all users is a customizable dashboard. A user has the option to select widgets to enhance their workflows, such as accounting information, timekeeping, tasks, calendar, and email. A user can return to this dashboard at any time by clicking the top of the left navigation panel. Admin users have access to a dashboard presenting all the accounting information for the firm. See Figure 1.

The left pane provides access to the major areas within the application such as email, CRM, matters, calendar, contacts, and tasks. A user can search across all their projects from the magnifying glass on the



**Figure 1:** Dashboards provide easily digestible information with clickable data points, allowing team members access to critical information at the click of a mouse.

“Integrated email gives users a familiar look and feel to a native email application, allowing tasks and events to be created and assigned effortlessly.”

“Zola Suite makes new case intake easy by customizing forms for any practice group, with questions tailored for each area.”

top toolbar, as well as perform a conflict check by searching people the user has previously worked with to display matters and contacts that match. Next to the magnifying glass is a “+” sign that allows users to add anything throughout Zola, such as a new email, matter, or contact. Users can get online help by clicking the “?”, accessing videos and articles, or opening a support ticket right from the interface. If the user has access to the accounting section, they can click on the star and select from a list of their favorite reports.

While Zola Suite doesn't rely on third-party integrations, several useful options exist. Some key areas for integration involve email and calendar management (O365, G Suite/Google Workspace, RPost), document management and automation (NetDocuments, Worldox, O365, HotDocs), and billing and accounting management (APX, QuickBooks).

### Time Entry, Task Management, and Workflow

Time is money, and accurately keeping track can present a challenge without proper tools. Timers are available from the right pane by clicking on the blue arrow that collapses down to a thin blue line (as seen in Figure 1). This panel will show up to nine timers created by a user. Timers can be started, stopped, saved for submission to the billing system, and narratives with details such as work type, task codes, and rate can easily be edited.

**Integrated email** gives users a familiar look and feel to a native email application,

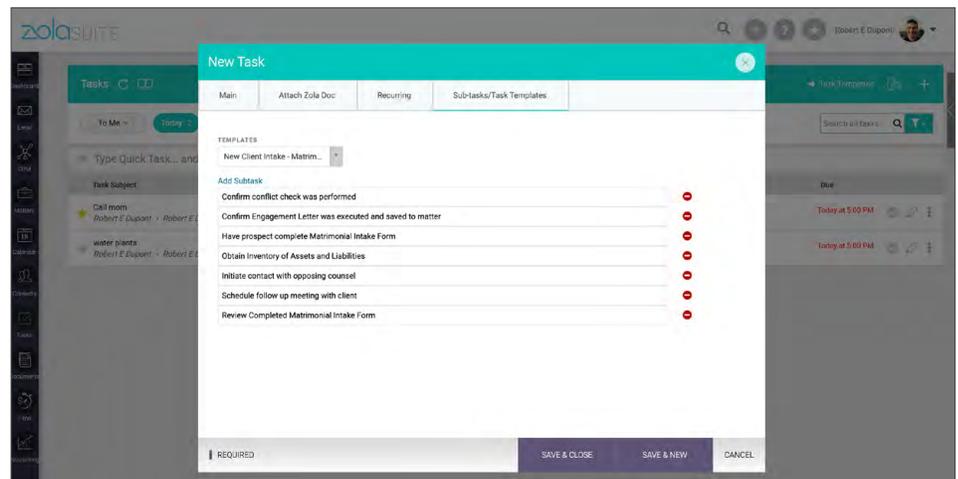
allowing tasks and events to be created and assigned effortlessly. Briefcases serve as a visual cue that an email is related to a matter. If there is a grey briefcase, the system is suggesting that an email should be related to a matter; purple indicates the email is related to a matter; green indicates the email has been related to a matter, and a time entry has been created. Communication is streamlined by auto-copying emails to the matter's communication tab. Additional features include court-admissible proof of delivery and electronic signatures for attached documents, securely encrypted via RPost integration.

Calendar features include auto-created time entries, the ability to follow team members' calendars, and rules-based calendaring via LawToolBox integration to auto-calculate procedural, administrative, and regulatory deadlines.

**Tasks**, accessed via the left panel, can be filtered by matter, task type, date (today, upcoming), assignee, and status (completed, overdue). The main tab—the first of four—allows a user to input a subject, priority, tags, due date, assignee, matter, and status for a task. The next two tabs provide options for document attachment and to designate recurrence. The sub-tasks/task template tab gives access to templates or the opportunity to identify a sub-task. *See Figure 2.*

### Automating Intake

Zola Suite makes new case intake easy by customizing forms for any practice group,



**Figure 2:** Workflow can be enforced using task dependency and templates, providing repeatable and defensible procedures. Zola Suite has made creating tasks intuitive and managing the progress a breeze.

with questions tailored for each area. It is easy to collaborate with clients and team members via web links, allowing form completion with the confidence that system access is safe and secure.

### Matter and Document Management

The matter dashboard, accessible via the left panel, provides general matter information and is customizable based on options like matter type and practice area, with standard filter capabilities. The top third of the matter detail page presents information on financial (hours billed, amount invoiced) and matter (number, name, status) details. The bottom two-thirds of the page displays several tabs, including contacts, tasks, communications (emails, phone calls), accounting information, documents, and more. See Figure 3.

### Zola Suite's Document Management System (DMS)

provides powerful functionality from the document tab, displaying all documents associated with a matter. A user can preview a document, open with zDrive to edit documents in native applications with version control, use an embedded zEditor to modify .docx documents or download a copy. Additional options for working with documents include converting to PDF, email as an attachment, tag, attach to a new task, and more. You can share documents with clients via Caseway, Zola Suite's secure client portal, which requires two-factor

authentication (2FA) and allows clients to access documents and pay invoices. Record and establish matter-related information under the options tab, including description, billing options (LEDES), permissions, and rates.

Zola Suite offers integration with third-party cloud storage, including OneDrive, and document management systems, including NetDocuments, iManage, and Worldox, with HotDocs integration available soon.

### Accounting

Zola Suites also incorporates a full-featured billing and accounting system. Users can generate invoices, apply payments, manage vendors, bills, banks, and registers (reconciliations), and generate reports. Each of these areas provides several options to automate procedures and workflow.

### Pricing

Zola Suite offers **three pricing tiers**, with varying features and options available in each.

- Core: \$59 per user per month when billed annually
- Enterprise: \$79 per user per month when billed annually
- Enterprise Plus: \$89 per user per month when billed annually

### Who is Zola Suite?

Zola Suite, headquartered in Port Washington, NY, offers a SaaS-based legal

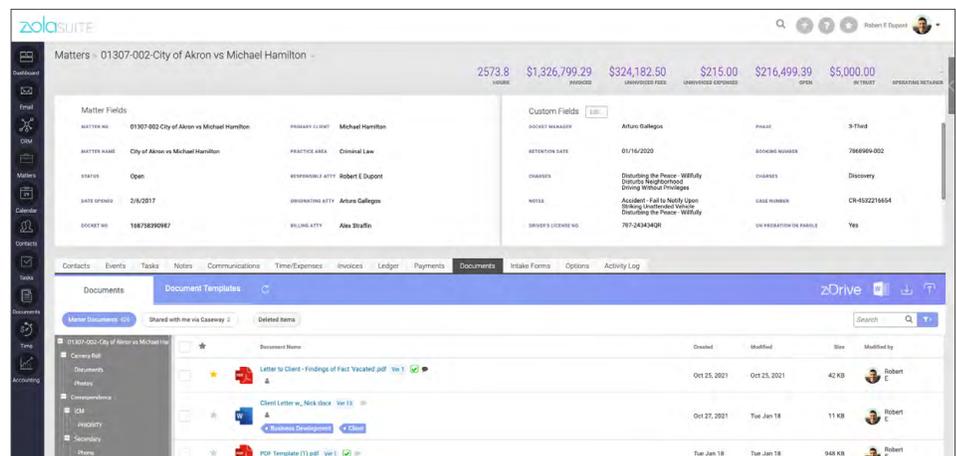
practice management tool that combines front and back-office functionality. In June 2021, AbacusNext and Zola Suite combined companies to provide their clients with a comprehensive portfolio of legal software solutions, including Zola Suite, AbacusLaw, Amicus Attorney, Office Tools, HotDocs, and Abacus Payment Exchange (APX). The combined company has over 300 employees, with about 40 employees dedicated to Zola Suite.

### Why Buy Zola Suite?

- Enjoy the benefits of an end-to-end practice management platform with native functionality that connects a firm's front and back offices.
- Zola Suite has over 30 advanced reports, multiple ways to track time, bulk billing capabilities, an intelligent (built-in) email client, CRM for prospect and intake management, a secure client portal, and more.
- Zola Suite is for firms that wish to "future-proof" their firm. Firms can easily outgrow their current provider, and, even if they don't need all the features Zola has to offer now, they will likely need them in the future when their team grows.

### See Zola Suite Today!

**Schedule a demo** with Zola to see how it can help you.



**Figure 3:** The matter detail page shows a significant amount of information, ensuring that everyone on the matter has access to all necessary information. Management teams can see everything related to each practice area and drill down to review supporting data.

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