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PRACTICE MANAGEMENT

BUYER'S GUIDE: 2023 EDITION

Practice Management 2023 Buyer's Guide

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Solution by Firm-Size		
Small Firms: 1-25 Attorneys	Midsize Firms: 26-100 Attorneys	Large Firms: 101+ Attorneys
<div>CARET Legal</div> <div>Clio</div> <div>CosmoLex</div> <div>Filevine</div> <div>Lawmatics</div> <div>mycase</div> <div>PRACTICEPANTHER</div> <div>rocket matter</div> <div>SmartAdvocate</div> <div>ZenCase</div>	<div>CARET Legal</div> <div>Clio</div> <div>Filevine</div> <div>Lawmatics</div> <div>mycase</div> <div>PRACTICEPANTHER</div> <div>SmartAdvocate</div> <div>ZenCase</div>	<div>Clio</div> <div>Filevine</div> <div>PRACTICEPANTHER</div> <div>SmartAdvocate</div> <div>ZenCase</div>

About

The Practice Management Buyer's Guide: 2023 Edition is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) legaltechmg.com.

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Welcome to Legal Tech Publishing's 2023 Buyer's Guide Series

By: Cathy Kenton and Brian Dalton



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

Each year, we launch our Buyer's Guide series with the Legal Practice Management volume, and this year is no exception. Prior editions of this Guide have been downloaded nearly 10,000 times and used by legal professionals to help inform their purchase decisions.

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 find the latest content, a product directory, and the ATL Non-Eventcast podcast series, consistently delivering relevant insights from some of legal tech's leading executives.

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,

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

Brian Dalton,
SVP, Breaking Media



Brian Dalton, SVP, Breaking Media

Practice Management Software

CARET Legal

Harness a Powerful and Secure Practice Management Platform to Take Firms, Professionals, and Their Clients Further



Streamline Administrative Tasks, Enhance Financial Reporting, and Manage Matters with Client-Centric Experiences from Anywhere, Anytime, with Clio



Technology Empowering Lawyers to Spend More Time Practicing Law Rather than Running the Practice



Conveniently Manage and Organize Case Information as it Happens in One Central Application



Drive Efficiencies Through Client Intake and Relationship Management with Lawmatics



Spend Less Time on Admin Tasks, More on Practicing Law, and Get Paid on Time with MyCase and LawPay



Improve Communication, Automate Activities, and Get More Done with PracticePanther: Law Practice Management Software Made Easy



Rocket Matter Brings Enterprise-Grade Law Practice Management to Any Size Firm



SmartAdvocate Version 2023 Adds 100+ New Features and Enhancements to Get "More Smart" About Litigating and Settling Personal Injury and Mass Tort Cases



ZenCase Solves Complex Problems for Law Firms, Improves Lawyer Productivity, and Increases Work Product with Less Effort

CARET Legal

Harness a Powerful and Secure Practice Management Platform to Take Firms, Professionals, and Their Clients Further

CARET Legal offers legal teams matter management solutions, including task management, client relationship management (CRM), document automation and management, communication management, notes organization, reporting, and billing and accounting”

Company Name Brand
CARET

Product Name Brand(s)
CARET Legal

Latest Developments and Updates

- Client texting: **communicate with clients via text** within the CARET Legal platform without needing to jump between applications or devices. Whether sending a quick message or setting up an appointment, the new in-app, two-way SMS messaging system provides another way for team members to efficiently manage important communication while providing a superior client experience.
- Email improvements: filing email correspondence is easier than ever. The platform automatically detects emails from contacts based on the pertinent matter, saves documents to a matter file, and converts them to specific tasks. The email system also offers encryption,

court-admissible proof of delivery, and electronic signatures.

- Integrated payment processing: convenient client payment methods are available via credit card, ACH, and e-check payments, so the firm gets paid faster.
- Sub-accounting: subdivide accounts for more detailed reporting and easier aggregation. Subdivided accounts appear under the parent account assigned to them. Users can view their balances as well as totals for the parent account, making reporting a breeze.
- Batch check printing: rather than printing checks one by one, select a group of checks and print them all simultaneously. You can choose the bank account and date range of the checks to print, giving office staff precise control and a more straightforward process.

Robust Practice Management

CARET Legal is a highly intuitive platform for firms to represent and work with their

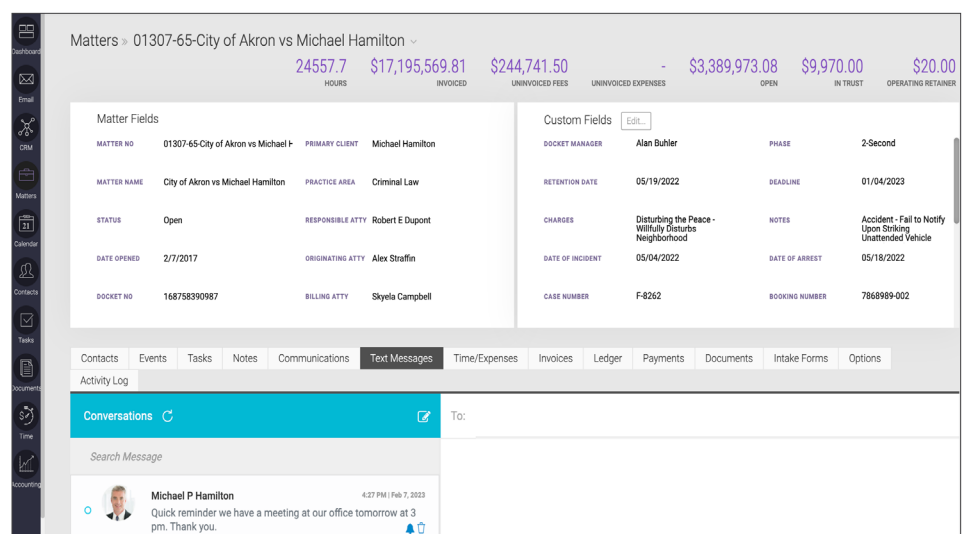


Figure 1: In addition to text messages, a user can access contacts, events, tasks, notes, communications (emails), time/expenses, invoices, ledger, payments, documents, intake forms, options, and an activity log.

CARET Legal now features embedded payment processing to allow firms to accept credit card, ACH, or e-check payments and save payment information for future use. Additionally, a firm can use a secure, firm-branded portal to share invoices and enable easy payments.”

clients. Everything, from the interface to reporting, provides insightful and concise options for all users. CARET Legal offers legal teams matter management solutions, including task management, client relationship management (CRM), document automation and management, communication management, notes organization, reporting, and billing and accounting. Some key areas CARET Legal has focused on developing include client communication and accounting functionality.

Client Communication

Solid communication can be the difference between success and failure. With this in mind, texting and email enhancements have been made within the CARET Legal platform.

Communicating with the legal team no longer requires that a client is tethered to their desktop. With CARET Legal, firm members are assigned a secondary “firm number” to use for SMS texting with clients, negating the need for the legal team to expose their personal cell phone numbers. All text messages are organized within a matter, providing date and time stamps for each message, thereby building a communication timeline. Additionally, CARET Legal offers the use of group chat simply by adding team members to a conversation. The matter dashboard provides multiple ways to access text messages – a user can click on the text bubble icon in the top right corner of the

screen or click on the text messages tab from the matter dashboard. *See Figure 1 on the previous page.*

These enhancements in client texting have made it easier for clients and legal teams to collaborate on a matter, whether in the office or away from their computers, fostering a positive and productive working relationship.

CARET Legal offers intelligent email management. Integrations with Microsoft 365, Exchange, and G Suite allow a user to easily manage case-related email messages through their existing email account without needing a cumbersome workaround. The platform’s patented Smart Suggest System™ will find case-related contacts and file emails for each matter, and a user can convert an email to a task with a single click. *See Figure 2.*

Accounting

CARET Legal delivers a complete accounting system for law firms, providing trust and business accounting features, multiple ways to create time entries, invoicing, advanced reporting with real-time visibility, payment processing, and expense payments.

CARET Legal now features **embedded payment processing** to allow firms to accept credit card, ACH, or e-check payments and save payment information for future use. Additionally, a firm can use

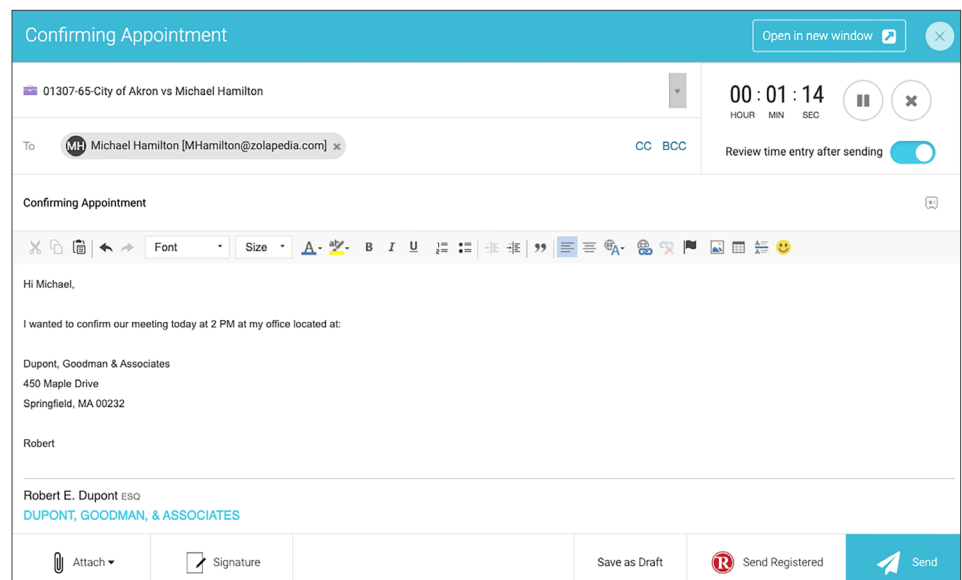


Figure 2: CARET Legal allows team members to easily add emails and contacts to a matter and convert them to tasks without missing a beat.

“ Law firms using CARET Legal report they recoup their investment 31% faster than G2’s legal practice management software category average.”

a secure, firm-branded portal to share invoices and enable easy payments. Processing fees are only pulled from operating accounts, which include fees for ACH. *See Figure 3.*

Sub-accounting is available, enabling a firm to group accounts under a parent account. This allows a user to view a total under that parent account, in addition to a breakdown of the individual account balances, providing helpful insight into spend and revenue.

CARET Legal’s offerings provide a workspace for legal teams’ daily work, reducing the need for other tools to manage a case from beginning to end.

Reporting and Analytics

CARET Legal has a customizable reporting dashboard displaying helpful information at a glance. Additionally, there are over 30 reports included that can be customized based on filtering. The reporting areas available are client, compensation, productivity, vendor, trust, and accounting—and each has several reports available.

Integrations and Security

In addition to email integrations, CARET Legal offers integrations with document management, calendars, and more.

CARET Legal employs state-of-the-art technology to detect, investigate, and stop threats before they impact their clients’ operations. This includes external security audits, advanced encryption, secure data transmission via bank-grade TLS

encryption that prevents digital eavesdropping by unauthorized parties, brute force attack countermeasures, and data redundancy/backup protocols.

CARET Legal’s infrastructure resides at AWS facilities in the United States which have achieved compliance with an extensive list of global quality and security standards, including ISO 9001, ISO 27001, and PCI DSS. In addition, CARET Legal has achieved SOC 1/ISAE 3402 and SOC 2 compliance.

Pricing

CARET Legal’s tiered pricing model offers flexibility to accommodate a firm’s needs. Please visit caretlegal.com/pricing for current subscription tiers and associated pricing.

Who is CARET?

A new name that exemplifies the mission. A caret (^) is a symbol that creates space for what’s to come. It makes room for expansion and represents the company’s commitment to caring for clients and helping them succeed. Going deeper, the CARET team defined these values to guide how they show up for each other, their partners, and their customers: succeed together, embrace progress, care big, and create space for what is next.

CARET brings the latest technology and automation to thousands of legal firms, empowering legal professionals to refocus their expertise on what truly matters. CARET harnesses powerful and secure practice management, document automation, and

The screenshot displays the CARET Legal client portal for Dupont, Goodman & Associates. At the top, there's a header with the firm's logo and a user profile 'gsmith' with a 'Logout' button. Below the header, a table lists documents with columns for 'Document Name' and 'Matter'. The documents include 'RL-Envelope.docx', 'U-0087-01_P123.doc', 'Letter to Orthopedic- medical records.docx', 'Medical expenses detail.xlsx', 'Draft against the warrant.pdf', and another 'Letter to Orthopedic- medical records.docx'. Below this, a section titled 'Shared Invoices' shows '1 UNPAID INVOICE'. There are 'Unpaid' and 'Paid' filter buttons, and a 'Pay Now...' button. A table titled 'Select Invoices to Pay' shows the following data:

Invoice No	Invoice Date	Paid Status	Total	Balance	Print
<input type="checkbox"/> 2373	04/21/2021	Not Paid	\$150.00	\$150.00	
<input type="checkbox"/> 1079	03/04/2017	Not Paid	\$50.00	\$50.00	
Total on this page				\$200.00	

Figure 3: CARET Legal’s client portal provides an easy way for a client to pay using a credit card. PayNow links can be sent by email, and clients can click the link and follow the instructions to make a payment. The system knows how to record the payment and automatically updates an invoice as paid or partially paid.

payment processing to take firms, professionals, and their clients further. CARET Legal, previously known as Zola Suite, is the company's leading cloud-based legal practice management (LPM) platform.

Why Buy CARET Legal?

- Law firms using CARET Legal report they **recoup their investment 31% faster** than G2's legal practice management software category average.

- Eliminate manual timekeeping with 10+ integrated methods to track billable hours automatically.
- Legal professionals can securely access critical client data on the go. CARET Legal is cloud-based and the first SOC 2 compliant solution that enables the freedom to work from anywhere, including the mobile app, while keeping client data secure.
- Drive more revenue and decrease A/R cycles with integrated accounting and

billing. Quickly and accurately calculate invoices without the need for additional accounting staff or specific software. Expedite billing cycles by offering clients convenient payment methods such as ACH and credit cards.

Try CARET Legal Today!

See how CARET Legal can benefit you, **[schedule a demo today!](#)**





Streamline Administrative Tasks, Enhance Financial Reporting, and Manage Matters with Client-Centric Experiences from Anywhere, Anytime, with Clio

“Grow offers customizable intake forms to quickly gather important information via the web or email, leading to client engagement. Custom intake forms can support conditional logic, which surfaces relevant questions based on variable answers.”

Company Name Brand Clio

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

Latest Developments and Updates

- Create a professional-looking website without coding using Clio Grow.
- Exchange SMS/text messages with clients using the web or mobile app without revealing attorney personal mobile numbers.
- Securely store credit card and eCheck payment details in Clio and allow clients to pay bills over time.
- Increase realization rates by sending clients automatic, custom bill reminders.
- Use calendar rules to automatically recalculate court events and deadlines when a trigger date changes.

- Reconcile trust transactions with bank accounts inside Clio.
- Use over 200 integrated, third-party apps from within Clio.
- Court forms, including federal immigration forms, are available for all 50 states.

Deliver Client-Centered Experiences

Clio's cloud-based legal practice management (LPM) platform helps law firms deliver client-centered experiences and meet expectations anywhere and anytime. The LPM software streamlines operations from client intake to case resolution with Clio Grow and Clio Manage, allowing firms to make data-driven decisions and move ahead with stability and resilience.

Clio Grow organizes and simplifies client intake processes. It automates client

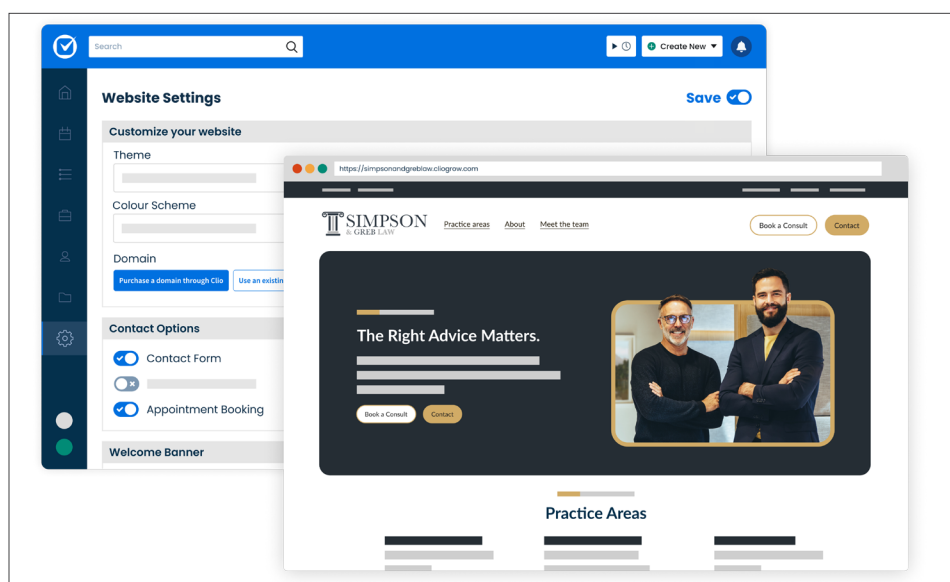


Figure 1: Clio Grow's Website Builder comes with everything you need to build a secure website in minutes to connect with clients, schedule appointments, collect payments, and more.

“The Clio for Clients portal, accessible on desktop or using the mobile app for Google Android and Apple iOS devices, supports secure, two-way messaging and document sharing with the firm and the ability to pay invoices online. Using the mobile app, clients can send documents from their files or use the built-in scanner.”

intake, generates retainers, requests client e-signatures, and schedules online consultations. Clio Manage helps run the firm, organize cases, collaborate with clients, and makes it easier for clients to pay with flexible payment plans in compliance with trust accounting rules.

Grow the Firm

Clio Grow client intake and client relationship management (CRM) attracts new client leads, tracks their progress using intake workflows, and schedules client consultations to retain them. The intake software lets you respond to client inquiries with email templates customized for different scenarios to ensure expedient follow-up. The templates can include secure links to intake forms, document attachments, and pull names and information from prospective client data.

Grow offers customizable intake forms to quickly gather important information via the web or email, leading to client engagement. Custom intake forms can support conditional logic, which surfaces relevant questions based on variable answers. Clients can complete the form at their convenience over multiple sessions if needed. *See Figure 1 on the previous page.*

Without learning how to code or paying an agency to maintain your website, you can create a [professional website with Clio Grow](#) in three easy steps. Select a website address or domain name, fill out a straightforward form, and publish the site. The website makes it easy for clients to find your services and collect prospective client information with custom intake forms. The site can promote the firm's social media and provide access to client portals, where clients can make online payments. The site can also schedule online client consultations.

When a new contact books an appointment on your website, they are automatically added to a pipeline of new business. You can view and customize your intake pipeline using a Kanban board, where you can quickly identify the status of new client opportunities and take the appropriate action to retain and convert the prospect to a client.

You can easily toggle between Clio Grow and Clio Manage and quickly import contacts and information from Grow to Manage. Move a prospect from Grow to Manage in a few mouse clicks and convert all lead data collected into a new matter. Signed retainers

The image displays two overlapping mobile app screens from the Clio for Clients portal. The background screen is titled 'Send bill' and features two toggleable options: 'Send to client portal' (which is turned on) and 'Send via email' (which is turned off). The 'Send to client portal' section shows a preview of an email message addressed to 'Lara.Smith@gmail.com' with the subject 'Message in Clio for Clients'. The foreground screen is titled 'Payment to Waverly Law' and shows a 'Total amount due' of '\$3,500.00'. It includes a 'Payment amount' field, a 'Bill details' section, and a 'Payment method' section with 'Credit Card' and 'eCheck' options. Below the payment method, there are fields for 'Name on card' and 'Card number'.

Figure 2: Clio for Clients is a portal for clients to securely communicate and share information with their lawyers using the web or mobile app.

“Set a default reply-to recipient, select an email template, and reduce your accounts receivable to zero.”

and other documents are stored in Clio's secure document management system (DMS), which features unlimited storage capacity and can be configured for HIPAA entities to store client-protected health information (PHI).

The conversion process also populates custom fields, transfers notes, and allows you to select responsible attorneys, the matter billing method (hourly, contingent, flat), and the case type to ensure a client-centered experience.

Client-Centered Experiences with Clio Manage

Lawyaw's document automation tool simplifies legal drafting and court form filling with a user-friendly interface. The tool offers a library of court forms and Word templates covering most jurisdictions in all 50 states, including USICS forms. Lawyaw also integrates with Clio Manage, automatically populating client and matter data into your documents and reducing the risk of errors, saving time in the document preparation process.

Clio's matter calendar synchronizes with Outlook and Gmail and can send clients text and email notifications to remind them of appointments and court dates. If you need to change a calendar date, Clio's court-rule functions recalculate dates and reschedules the matter.

Quickly find the right document from Clio's global search bar by searching for keywords within its title, metadata, or text contents. Open existing documents online with the Clio launcher from your mobile

phone, laptop, or desktop computer to edit and save a new document version back to the DMS—without downloading and reuploading the file. The launcher will work for any file associated with a default editor, such as Microsoft Word or Adobe Acrobat. You can also use Clio Drive on a Mac or PC to create, access, and share matter-related files from the desktop and securely and automatically sync them to Clio's DMS. See *Figure 2 on the previous page*.

The Clio for Clients portal, accessible on desktop or using the mobile app for Google Android and Apple iOS devices, supports secure, two-way messaging and document sharing with the firm and the ability to pay invoices online. Using the mobile app, clients can send documents from their files or use the built-in scanner. Furthermore, clients can call Clio support if they need help.

Clio stores all client communication in the communications tab of a matter. There, you can send and receive client SMS/texts, and store duplicate client emails from Outlook and Gmail—attachments are automatically stored in the DMS. If the firm integrates Voice Over IP (VoIP) software with Clio, you can store voicemail and call data with notes in the communications tab. Clio can create time records from any client communication.

Manage Cash Flow and Reconciliation

Clio Manage processes **credit and debit cards and eCheck** (Automated Check Handling or ACH) with simple, transparent transaction rates. You choose when payment processing fees get billed to the

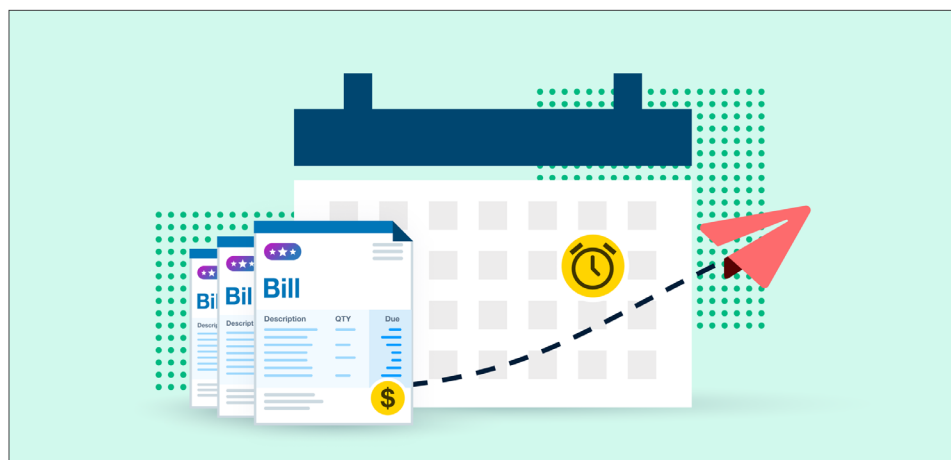


Figure 3: Send automated bill reminders with Clio Manage and reduce the time spent collecting overdue invoices.

client: per transaction in real-time or one lump-sum amount at the end of the month.

After you generate and review pre-bills and send the invoices, Manage makes it easy for clients to pay via credit card or check on your website, in a web and mobile-friendly client portal, in person, or over the telephone. Send clients click-to-pay links and QR payment codes in invoices, emails, or text messages. Clients can pay conveniently on a schedule using custom payment plans that calculate bills in manageable amounts that fit their budget. *See Figure 3 on the previous page.*

Manage allows you to set automated bill email reminders to get paid on time. Send reminders to one or all associated bill recipients on a schedule after sending invoices and repeat the reminders at regular intervals. Set a default reply-to recipient, select an email template, and reduce your accounts receivable to zero. Reminders automatically attach all outstanding client bills.

Clio Manage also provides regulation-compliant trust accounting. The system manages trust-related transactions in compliance with IOLTA (Interest on Lawyer Trust Account) rules, keeping earned and unearned funds separate and protecting trust accounts from third-party debit transactions, including credit card processing fees and chargebacks. Reconcile trust transactions with your bank accounts within Clio and use Payment Card Industry (PCI) compliant bank-grade security to protect client payment data and detect potential fraud.

Reports

You can generate comprehensive reports for accounts receivable, invoice aging, revenue, fee allocations, and productivity by client and matter. Clio's billing reports provide detailed insights on individual clients, lawyers, date ranges, case types, or trust account status.

All reporting is easy to generate and export in Microsoft Excel or PDF format to ensure firm leaders understand and visualize personal performance criteria and the firm's financials. You can save reports and re-generate them on demand on the web or in PDF or Excel format. A law firm can also monitor critical firm metrics, such as rate realization, from an intuitive insights dashboard.

Integrations

Clio offers [over 200 app integrations](#) from the Clio App Directory. Clio also has robust integration with DocuSign, Dropbox, Microsoft 365, QuickBooks Online, Google Calendar, Google Business Profiles, and Zoom to provide the opportunity to streamline data and task management.

Pricing

Clio pricing ranges from \$39 to \$129 per user per month and can be billed annually or monthly, depending on the Clio Manage tier you choose: EasyStart, Essentials, Advanced, or Complete. At the individual level, you can add Clio's client intake and legal CRM software (Clio Grow) to the Essentials or Advanced plan for \$49 per user per month. Or you can bundle Clio Manage and Clio Grow in a Complete subscription for \$129 per user per month billed annually. Essentials, Advanced, and Complete subscription plans include court calendaring rules. All Clio Manage subscriptions include Clio Payments, with simple, transparent pricing and no hidden fees. The payment processing charges include 2.95 percent for all standard cards, 3.5 percent for American Express, and \$2 per eCheck.

Who is Clio?

Clio is transforming the legal experience for all by creating cloud-based technologies for law firms—to keep lawyers and their clients better connected throughout the legal process. Firms of all sizes and practice areas use Clio products—Clio Manage, Clio Grow, and Lawyaw—to manage firm

operations, streamline billing and payments, automate legal documents, and improve client experiences. More than 150,000 legal professionals in 100 countries use Clio, and it is approved by more than 90+ bar associations around the world. Clio is based in Burnaby, BC, Canada, with offices in Calgary, Toronto, and Dublin, Ireland, and a new office in Australia. Following its US\$250M Series D funding led by TCV and JMI Equity and its US\$110M Series E investment led by T. Rowe Price Associates, Inc. and OMERS Growth Equity, Clio became the first legal practice management unicorn in 2021. Clio reached centaur status in 2022 after reaching US\$100M in ARR.

Why Buy Clio?

- Enable clients to pay from custom invoices and automated payment plans using credit or debit cards or eCheck with secure, click-to-pay links.
- Book client meetings in the Clio Scheduler with Clio Payments integration.
- Clio provides free data migration from previous LPM software for Essentials, Advanced, or Complete subscription plans.
- Integrate more than 200 apps from the Clio App Directory.
- Clio offers industry-standard security and compliance, including PCI and HIPAA, and provides 24/7 customer support.
- Used by over 150,000 legal professionals and approved by 90+ bar associations and law societies worldwide.

Try Clio Today!

Clio is free and easy to try. It offers extensive support and training to help your firm organize and set up, including migrating data from other legal software. See how Clio can help you work more efficiently, offer clients better experiences, and manage and grow your firm by [starting a free 7-day trial of Clio today](#). ■

Technology Empowering Lawyers to Spend More Time Practicing Law Rather than Running the Practice

“Build robust intake forms, collect information on marketing efforts and sources, and use custom fields to gather information needed to support varying case types.”

“Dashboards are customizable and dynamic and can be tailored to each user. You can see information at the firm and individual levels, allowing attorneys to view only what pertains to their cases.”

Company Name Brand

ProfitSolv

Product Name Brand(s)

CosmoLex, CosmoLex CRM, CosmoLexPay

Latest Developments and Updates

- CosmoLex CRM module has been released, providing a streamlined platform for converting leads into clients.
- E-signature and secure sharing are now available.
- Zapier integration provides access to potentially thousands of applications.

Enhanced Client Management and Intake

As the next step in expanding its web-based practice management application, already featuring document management (DM) and law firm billing and accounting systems, CosmoLex has added a new Client Relationship Management (CRM) module. CRM is designed to assist firms in growing their profits by streamlining the management of prospective clients and the new matter intake process. Build robust intake forms, collect information on marketing efforts and sources, and use

custom fields to gather information needed to support varying case types.

The CRM module takes advantage of the communication tools available in CosmoLex to avoid playing phone tag and uses text, email, and video to improve communication with potential clients and gather essential information needed to qualify or disqualify a lead. This tightly integrated module provides a method for sending engagement letters for e-signature and converting a lead into a matter, bringing all essential information already collected directly into the practice management application.

Increase Insight with Dashboards

The intuitive dashboards are the first things you notice when moving from CRM to practice management. You can see a macro view of the status of billing and invoices at a glance rather than needing to dig through reports. Dashboards are customizable and dynamic and can be tailored to each user. You can see information at the firm and individual levels, allowing attorneys to view only what pertains to their cases. See Figure 1.

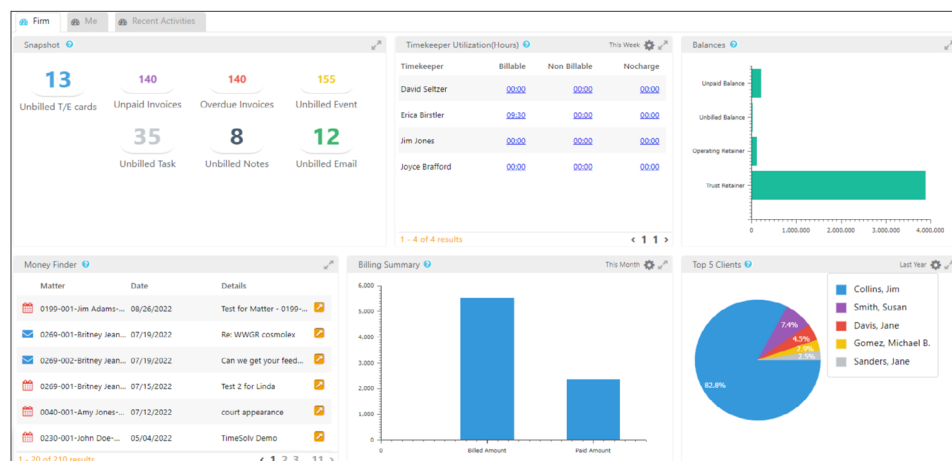


Figure 1: Dashboards show critical information about the firm's cases, particularly as it relates to billable hours, invoices, and timekeeper utilization.

“Legal-specific accounting tasks are simplified, such as tracking independent ledgers and the flow of money in and out of any account (trust or operational). Credit cards provide a challenge to bill and track costs for multiple clients and from multiple cardholders, all of which are manageable within CosmoLex.”

Matter Level Information

CosmoLex provides a comprehensive platform to manage work on a matter. The left navigation panel offers easy access to a variety of information to assist a user. The summary option will display a matter dashboard, helping develop a clear picture of a matter. The initial dashboard shows a summary of client information, trust account balances, billed and unbilled time, information on invoices, and more. See *Figure 2*.

To begin the day, simply open CosmoLex, click on a matter, and you can find everything needed to start working on a project. After viewing the matter summary, you can access billing, banking, email, calendar, tasks, documents, notes, relations, and a client portal. The billing section provides insight into the hard and soft costs related to a specific matter. Go to the banking section to see real-time retainer balances and provide information on trust accounting for the matter.

Integrated email tracking (Gmail, GSuite, Apple Mail, Outlook, and O365) allows you to file email according to matter, indicate if the email is billable, and begin timers if needed. This integration is just one way CosmoLex provides an opportunity to capture time. Calendar integration with O365 and Google (via a two-way sync) also facilitates identifying events as billable, indicating the related matter, and creating a time entry.

Create and assign tasks to team members individually or create workflows for repeatable processes utilizing conditional logic. Developing repeatable workflows has become the standard for firms to ensure nothing falls through the cracks.

Team members can share documents within CosmoLex. Integration with LexShare provides eSignature capabilities, and CosmoLex integrates with other DM systems (Dropbox, Google Drive, OneDrive, and NetDocuments).

Law firm teams often get bogged down sending documents back and forth to clients and playing phone tag. CosmoLex's Client Portal solves this problem. With the click of a button, attorneys can share any item with their clients, whether a task, calendar event, document, or even a note. Coupled with the communication tools that facilitate two-way texting, the client is always in the loop.

Legal Billing and Payments

CosmoLex's billing and accounting module is purposefully built to help simplify managing the business end of a law firm. Integration with the practice management platform minimizes potential data entry mistakes and eliminates the need for additional accounting applications.

Legal-specific accounting tasks are simplified, such as tracking independent ledgers and the flow of money in and out of any account (trust or operational). Credit cards provide a challenge to bill and track costs for multiple clients and from multiple cardholders, all of which are manageable within CosmoLex. Easily track hard and soft costs and post or pay invoices all within the application.

One of law firms' most critical accounting issues is managing and reconciling **interest on lawyers' trust accounts (IOLTA)**. CosmoLex has tools with built-in safeguards necessary to help law firms stay audit-ready and IOLTA compliant.

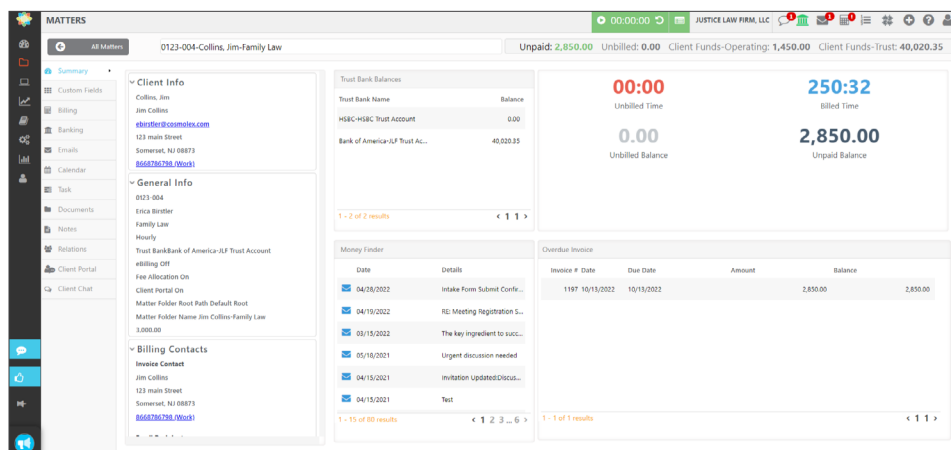


Figure 2: The matter dashboard provides a snapshot of client information and matter billing status.

CosmoLex provides extensive capabilities to conduct day-to-day activities of managing both accounts payable and accounts receivable. You can print checks, search for transactions, create batches for deposits, and reconcile accounts. CosmoLex's secure client portal provides access to LawPay and [CosmoLexPay for credit card payments](#).

Reporting

Reporting provides numerous pre-defined reports, and you can create accounting reports at a firm or matter level. Available reports include, but are not limited to, profit and loss, balance sheets, general ledger, and accounts payable. A firm with multiple offices can create reports for each office as well as for individual attorneys. *See Figure 3.*

Security

CosmoLex is SOC-2 compliant and has developed platform security using bank-grade 256 SSL encryption. They employ account-level security, two-factor authentication (2FA) via SMS, and role and user-level access privileges. Backups are done automatically every few hours with encryption and built-in redundancies.

Pricing

CosmoLex provides an all-inclusive pricing model that gives access to all new features as they are added and comes with a 90-day money-back guarantee. Licensing is based on annual or monthly billing of \$89 or \$99 per user per month, respectively. Each account comes with built-in credit card processing, a free bookkeeper or accountant login, unlimited training and support, and unlimited file storage. CRM and document sharing modules are available at an additional cost, and payments incur a processing fee.

Who is CosmoLex?

CosmoLex is a fully integrated solution that lets solo attorneys and small law firms manage their practice, billing, payments, and accounting with one login. Law firms running on CosmoLex eliminate the need to maintain multiple programs with CosmoLex's broad coverage, including time and expense tracking, billing, business accounting, trust (IOLTA) accounting, calendaring, task, email, document management, and even a CRM, in one web-based application. The built-in client portal provides streamlined and

secure client communications. CosmoLexPay increases the ease and speed of receiving payments through compliant credit card processing. CosmoLex takes care of the entire legal practice so that lawyers can take better care of their clients. Based in New Jersey, CosmoLex has more than 250 clients worldwide and is growing.

Why Buy CosmoLex?

- Customizable user experience.
- Streamlined workflows ensure consistency.
- Client portal simplifies collaboration with clients.
- Intuitive user interface.
- A unified data platform enhances information management.

See CosmoLex Today!

CosmoLex has [many more features](#) than are listed in this review. [Schedule a demo](#) today to learn more about how CosmoLex can help your firm.

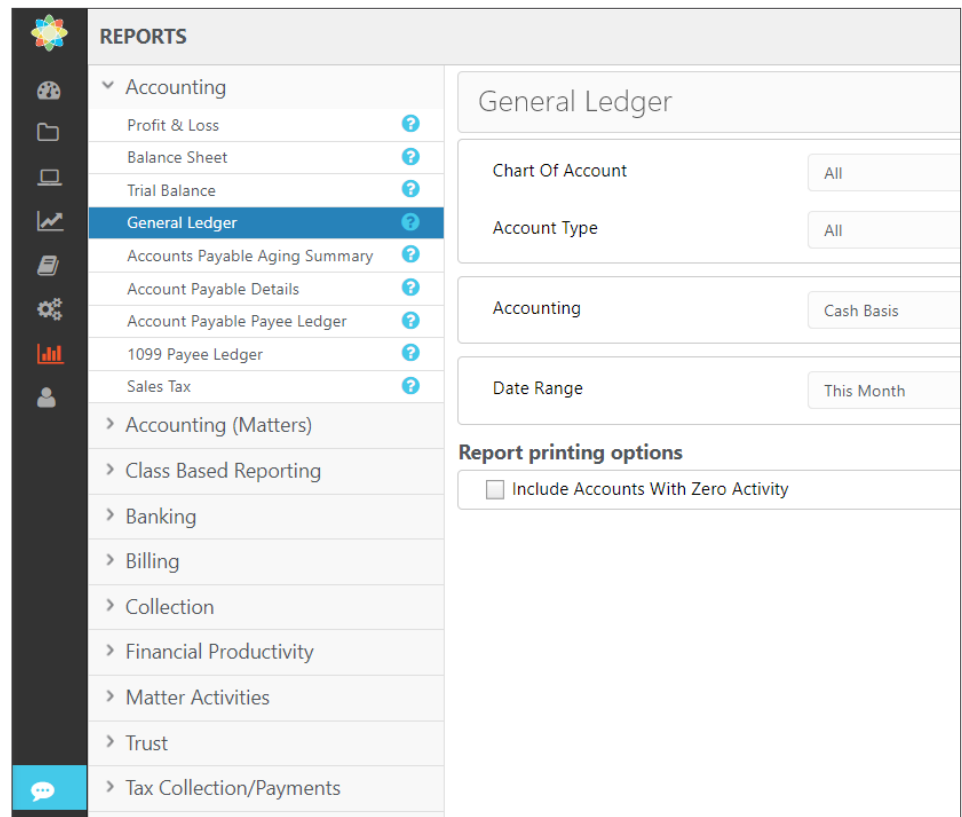


Figure 3: Reporting capabilities within CosmoLex are extensive and allow a firm to look at its business performance from several perspectives.



Conveniently Manage and Organize Case Information as it Happens in One Central Application

“Filevine creates a record of each action taken in a project, noting who performed the action and the time it happened, and enables each team member to interact via comments. Keeping all this information in one place drives efficiency in team communications, making it easy to stay up to date on a case.”

Company Name Brand
Filevine

Product Name Brand(s)
Filevine

Latest Developments and Updates

- Filevine Document Assembly enhances the repeatability and precision of document drafting and generation, helps scale your document processes, and increases visibility and control over document approvals and workflows.
- Filevine interface redesign, increasing efficiency and precision and providing a seamless user experience.
- Filevine's integrated eSignature solution, Vinesign, introduces blockchain technology for document verification. A complete record of eSignature activity is recorded on a private blockchain, enabling anyone with a Vinesigned document to verify its authenticity, recency, and fidelity.
- Filevine's new tag management modernizes your firm's case and project

management with easy tagging for every document, client, and detail. Create, edit, archive, search through tags, and perform bulk actions like merging and deletion.

- Filevine continues to introduce time capture and invoicing capabilities to support customers operating on an hourly billing basis.
- Lead Docket continues to simplify new client intake, including lead forms for information capture, automations to expedite the intake process, and a seamless transfer of information from leads directly into a new matter.

One Platform to Manage Them All

Filevine gets its name from the idea that, just as leaves grow on a vine, information grows in a case. The leaves in Filevine include emails, tasks, documents, and more. Traditionally, users had to pull these leaves from a variety of applications and locations. Filevine provides one platform for easy collaboration across a firm, giving attorneys and paralegals access to all their

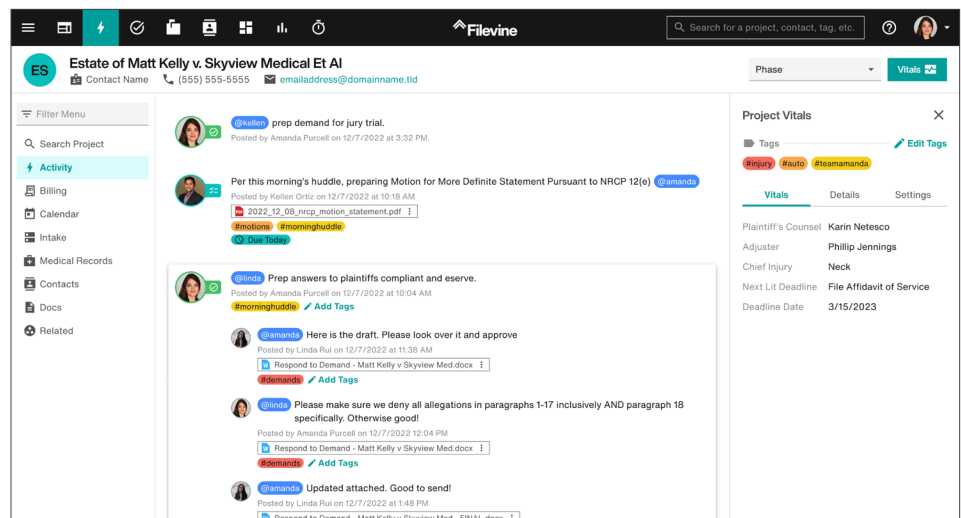


Figure 1: The Activity Feed shows all activities and communications on a case, giving team members one location to see what is going on in their matters, and what, if anything, needs to be done.

“Filevine has built a document management system (DMS) for the modern firm that automates creation and encourages collaboration through an intuitive user interface to create and edit documents.”

“Both the project hub and task list allow a user to focus on elements of matters requiring their attention. The mailroom and contacts provide easy access to communications and information about clients. Timesheets, billing timers, and calendaring assist a user with tracking and coordinating work.”

information in one place. Filevine provides case management, lead management, document management, contract management, and business analytics.

Tailored Workflows

Each firm can design workflows within Filevine that adhere to its protocols for each phase of a case or matter. Workflows are developed to ensure no steps are missed. Filevine can use each task to trigger the next task in a workflow. For example, once a potential client is accepted, an engagement letter will be initiated and presented to a user to modify for that new client. As each step or task is completed, Filevine's automation function will serve up the next task in the workflow, based on the results of the prior action.

Activity Feed

Filevine creates a record of each action taken in a project, noting who performed the action and the time it happened, and enables each team member to interact via comments. Keeping all this information in one place drives efficiency in team communications, making it easy to stay up to date on a case. *See Figure 1 on the previous page.*

The tag management tools have been updated so users can harness the value of tags to standardize organization. As the leaves in your case are created (communications, tasks, and documents), they will appear in the feed. Users can tag these items as they are created or add/edit them afterward. The tag manager allows users to filter the feed items by tag, grouping information for easy access.

Document Drafting, Collaboration, and Management

Drafting documents is an integral part of any law practice, regardless of the area of law. There has always been a search to make it easier and more efficient. Filevine has built a document management system (DMS) for the modern firm that automates creation and encourages collaboration through an intuitive user interface to create and edit documents. *See Figures 2 (below) and 3 (on the next page).*

Information from all sections of a case can be accessed to build a document. Filevine has gone a step beyond standard office documents by developing a proprietary file format. The .vine file format is a “living” document format that offers enhanced editing, flexibility, and control during collaboration. Create documents by seamlessly connecting to information within a matter record. A user can check out sections of a document rather than the entire document, allowing team members to work on other areas of the document. Filevine provides bi-directional updates, which negates double entries. Updates must be made within Filevine. Documents can be shared with clients via a weblink without requiring a Filevine account. However, clients can sign up for a free account and receive access to specific elements of a case as needed. Document folders or individual sections of a document can be shared, and a user can be assigned viewer rights, propose change rights, or editing rights. Documents can be sent to clients for eSignature via the integrated Vinesign solution. A complete record of eSignature activity is recorded on

The screenshot displays the Filevine web application interface. On the left is a sidebar with a 'Filter Menu' and various navigation icons. The main workspace is divided into two panes. The left pane shows a form titled 'Settlement Letter(15)' with fields for 'Client Unique ID Number' (AB123300456-1), 'Total Settlement Amount (\$)' (1.9 Million), 'Number of Eligible Plaintiffs' (36,000), and 'Percentage of Plaintiffs Needing to' (97). Below these are fields for 'Recipient State of Residence' (Texas) and a 'Settlement Letter Doc Assembly Widget'. A 'Generate' button is present. The right pane shows a preview of the generated settlement letter document. The document has a header, a body of text describing the settlement, and a table at the bottom with columns: 'Client's Treatment Status', 'First Name', 'Last Name', 'Date Treatment Started', 'Date Treatment Completed', and 'Client Payment'.

Figures 2 and 3: Document creation uses templates incorporating information to be inserted. These examples show the creation of a settlement letter and a demand letter.

a private blockchain, enabling anyone with a Vinesigned document to verify its authenticity. Once a document is finalized, it can be exported to popular file formats.

Customization and Information Access

Filevine offers a customized user experience. Following the initial account log in, you can choose to land on a variety of pages. Most choose to land on the activity feed when they log in to see the status and activity in cases they follow. Project hub is another landing page option and provides more detailed information on cases and tasks.

The quick navigation bar runs along the top of the page, and a global search bar is available to the right. Both the project hub and task list allow a user to focus on elements of matters requiring their attention. The mailroom and contacts provide easy access to communications and information about clients. Timesheets, billing timers, and calendaring assist a user with tracking and coordinating work. Many users find the global search bar as another navigation option within Filevine. A user can click the search bar and see a drop-down of all recent matters and areas where they have been working.

Additionally, a complete CRM module and docketing integration are built into the platform.

Educational Resources

In addition to implementation support dedicated to getting new customers up and running, Filevine provides [many resources](#), including podcasts, blogs, and white papers.

Plays Well with Others

Filevine offers an open API and extensive possibilities to connect with other applications, allowing users to further customize Filevine as a single location for daily tasks. [Integrations](#) include Zapier, Slack, Google (calendar, Gmail), and Outlook 365. Filevine's integration with DOMO provides access to reports that provide oversight across all matters.

Pricing

Filevine provides [pricing](#) based on the number of users and modules deployed. The Filevine Platform comes with time & billing, basic document management, case management, and more; add-on modules include advanced document management, business insights, and document assembly. Contact Filevine to discuss your needs and get a quote.

Who is Filevine?

Filevine is changing how legal work gets done for practitioners and their clients. As a leading legal work platform, Filevine is dedicated to powering everything from document management and client communication to legal drafting, deadline,

and task management. Founded in 2014 and based in Salt Lake City, Utah, with clients in the United States and Canada, Filevine has grown to over 450 employees and 50,000 users. Filevine provides top-rated, cloud-based automation tools to law firms, legal departments, and businesses, including case, matter, investigation, and project management software.

Why Use Filevine?

- Filevine connects all your legal work — from task automation to client communication and business analytics to legal documents. Filevine powers your business from start to finish.
- Filevine is constantly updating and adding new functionality to drive efficiencies and improve user experience.
- Filevine is a highly-ranked legal software company on the Inc. 5000 list, has been named one of the Utah Business Fast 50, and is among the top 50 fastest-growing privately-owned software companies according to the 2021 Inc. 5000 list.

Schedule Your Demo Today!

[Request a Demo](#) or contact Filevine at 801-657-5228. Follow the Filevine website or social media channels to stay up to date on [new features](#).

The screenshot displays the Filevine web interface for creating a settlement letter. The main form is titled 'Settlement Letter(14)' and includes a sidebar with navigation options like Activity, Calendar, and Matter Summary. The form fields are as follows:

- Incident Title:** Aliso Canyon Gas Leak Litigation
- Description of Incident:** rupture that occurred at well SS-25 from October 23, 2015 to February 11, 2016 (the "Gas Leak"). Over 100,000+ leak in US history. Over 8,000 families were forced to relocate. During the gas leak, SoCalGas repeatedly failed
- Client Unique ID Number:** AB123300456-1
- Total Settlement Amount (\$):** 1.9 Million
- Number of Eligible Plaintiffs:** 36,000
- Percentage of Plaintiffs Needing to:** 97
- Recipient State of Residence:** Texas
- Settlement Letter Doc Assembly Widget:** Settlement Letter (15)none

A table titled 'Client's Treatment Status' is also present:

Client's Treatment Status	First Name	Last Name	Date Treatment Started	Date Treatment Completed	Client Payment
Treatment Complete	Clan	Elbert	August 25, 2022	September 7, 2022	
Treatment Complete	Jula	James	August 1, 2022	August 8, 2022	

Below the table, there are buttons for 'Add New', 'Print', 'Next call', and 'Cancel'. The form also includes a 'Generate Documents (17) show all' button at the bottom.

Figures 2 and 3: Document creation uses templates incorporating information to be inserted. These examples show the creation of a settlement letter and a demand letter.



Drive Efficiencies Through Client Intake and Relationship Management with Lawmatics

Lawmatics is a cloud-based Client Relationship Management (CRM) tool used to manage and customize everything from intake to time & billing. The platform was designed to automate repeatable processes, allowing attorneys to spend less time on administrative tasks and more on the practice of law.”

Company Name Brand
Lawmatics

Product Name Brand(s)
Lawmatics

Latest Developments and Updates

- Time & billing, and payment plans—collecting payment for consultation fees is made easier with the LMPay Gateway in custom forms and booking forms. Including this advanced field in your consultation forms simplifies appointment scheduling and making consultation payments for your clients.
- You can now use Lawmatics to perform your firm’s conflict checks automatically or manually. The system searches against all account data, including fields and notes, and instantly alerts you if it finds a match.

- Improvements for managing tasks, including custom task statuses, sub-tasks, and comment threads on tasks.
- Booking forms updated so a firm can select Zoom as a meeting location and add the link to an event, along with the ability to allow multiple attendees in one event, and book with the earliest available meeting host.
- Increase email deliverability with the option to send emails from your outbox. This allows any emails sent through Lawmatics to appear in the outbox of your regular email client.

Increase Productivity and Results with Automation

Lawmatics is a cloud-based Client Relationship Management (CRM) tool used to manage and customize everything from intake to time & billing. The platform

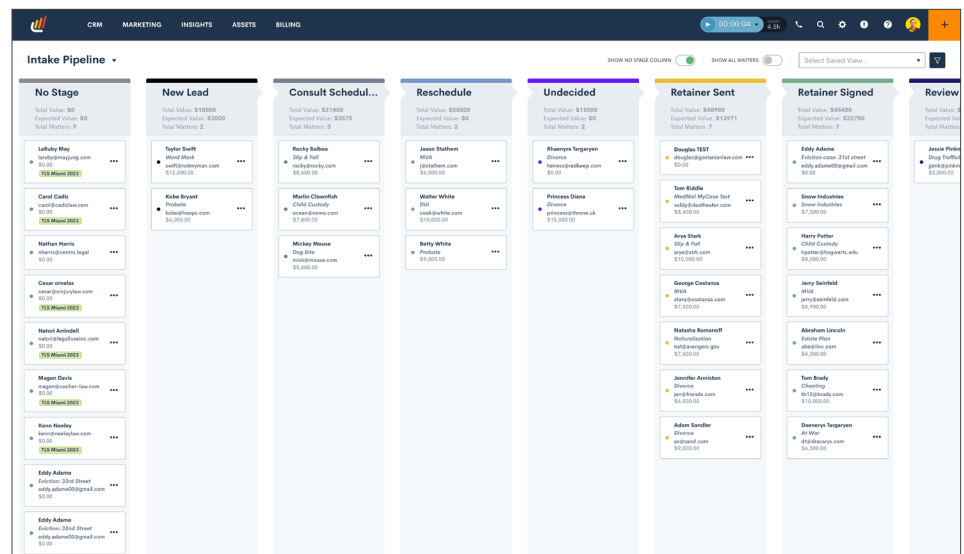


Figure 1: The intake pipeline provides an easy visual showing each pipeline stage with a list of each potential client. Users can get a quick update on matters and their progression through the intake process.

“ Lawmatics has designed a system to automate and manage intake with streamlined communications and easy payment options. Law firms can design phone-based intake forms to meet their needs.”

was designed to automate repeatable processes, allowing attorneys to spend less time on administrative tasks and more on the practice of law. **Custom automation** plays a key role in Lawmatics, incorporating triggers and taking users to the next step. A firm can quickly and easily build forms using conditional logic and set multiple conditions with “and/or” relationships.

From Intake to Client

Clients are the bedrock of every firm. It is essential to cast a positive impression of a firm in the initial intake process. Lawmatics has designed a system to automate and manage intake with streamlined communications and easy payment options. Law firms can design phone-based intake forms to meet their needs. The platform is customizable to help facilitate the easy collection of necessary information. Based on data entered in a form, additional fields can become available to enter other facts.

Once the type of consultation is selected, a user is automatically taken to the scheduling section of a form. In addition to standard scheduling options, like date and time, there are new features implemented, including the ability to add additional attendees (other than the initial contact) as well as selecting a Zoom meeting as the location, which includes a meeting link in the invite. The ability to schedule free

consultations is an existing feature; however, it has been upgraded to allow for paid consultations with the addition of LMPay. A user is taken to a payment form after picking a date and time for their consultation to capture payment information. Payments can be made by credit card or bank account, providing significant time savings by including billing as part of the automation process.

After a phone intake form is submitted, a user can find the case on the matter page, which lists all matters and can be sorted by stage, practice area, or status. Matters can also be found on the pipeline page, which provides a Kanban view of all your matters by their current stage, and you can drag/drop matters from one stage to another. This view provides a visual representation of the overall status of matters going through different pipeline stages. The customizable stages are color-coded and typically include intake milestones such as new leads, consult scheduled, reschedule, undecided, retainer sent, and retainer signed. Select a matter from the matter or pipeline page, and you will be taken to that matter's activity timeline. *See Figure 1 on the previous page.*

The activity timeline shows all activities that have occurred in a matter. It provides action buttons for users to take action

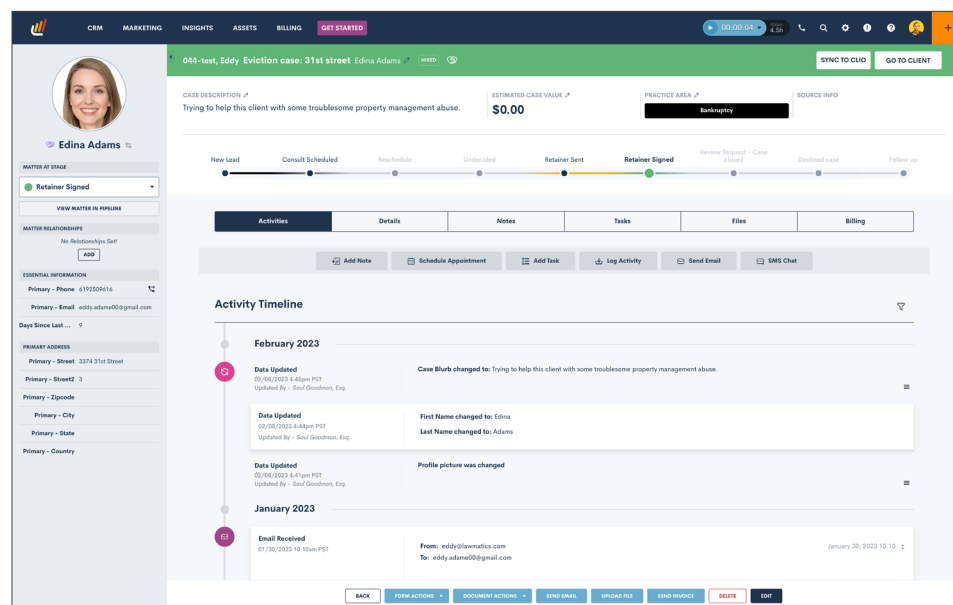


Figure 2: The activity timeline shows contact information along the left panel with the timeline to the right. Users can access details, notes, tasks, files, and billing information. Additionally, users can add notes, schedule appointments, add tasks, log activities, send an email, or send an SMS message. The matter phase is indicated at the top of the page.

“Task-related communication improvements include the ability to add comments to a task, allowing users to ask a question or request more information, and using @mentions in task comments to ensure a team member doesn't miss a question or directive.”

easily, such as adding notes, scheduling appointments, adding tasks, logging activity, and sending emails or [SMS text messages](#). Users can also see details related to a matter, billing information, notes, existing tasks, or files. Billing Information is presented initially on an overview, showing time, invoicing, and trust account summary. With a mouse click, a user can see more detailed information on time entries, expenses, invoices, payment activities, and trust accounts. Files are also available from the timeline. Having all documents for the intake and billing processes in one place is extremely helpful, and users can create folders to assist with organization. See *Figure 2 on the previous page*.

Task Management

The automation capabilities in Lawmatics continue evolving, becoming increasingly valuable to users. Enhancements to tasks enable a firm to customize its status in a way that makes sense for the practice. You can add sub-tasks to build workflows that ensure each task is done correctly, and no steps are skipped. See *Figure 3*.

Task-related communication improvements include the ability to add comments to a task, allowing users to ask a question or request more information, and using @mentions in task comments to ensure a team member doesn't miss a question or directive.

Client Portal

Lawmatics provides a user-friendly client portal that helps eliminate the game of tag via email and phone. Clients can collaborate with their legal team, sharing files and calendars. Send documents securely from Lawmatics for client signatures and incorporate deadlines to provide more control over agreements. This streamlined communication reduces waiting time for both clients and the law firm.

Security and Integration Friendly

Lawmatics is hosted on Amazon Web Services (AWS) with state-of-the-art security and privacy features built into the platform by default; 256-bit AES encryption of stored data; data sent and received using 128-bit SSL encryption; two-factor authentication (2FA); nightly backups to redundant Amazon S3 servers; military-grade physical protection with 24-hour security escorts; and all staff are trained and updated on the latest technology security protocols.

Lawmatics has an open API developer platform and existing integrations with several applications. [Existing integrations](#) include Clio, MyCase, Zapier, Rocket Matter, Practice Panther, and LawPay.

Pricing

Lawmatics offers [simple and transparent pricing](#) in three product bundles: Lite, Pro, and Enterprise. The products include various features of client intake, CRM, marketing automation, customer reports,

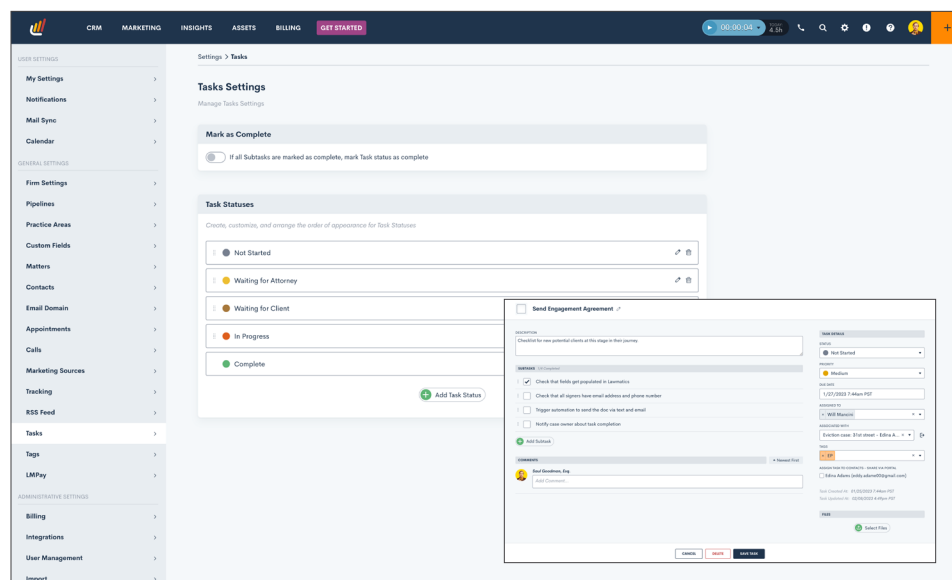


Figure 3: Task improvements include customizable statuses that closely correlate to firm processes. Sub-tasks are also available, ensuring no steps are overlooked.

and insights. All products come with CRM features, one-way SMS/text messaging, e-signatures, custom reporting, API access, and more. The Pro and Enterprise products support client portals.

The Pro version is the most common plan, and its \$249/month base price includes:

- 3 Users, \$59/mo/user additional
- 15,000 Contacts, \$25 per additional 5,000
- Custom Forms
- Appointment Scheduling
- 100 Emails/Automations
- Document Automation
- 400 eSignatures/month, 10¢ additional
- File Requests
- 15,000 Contacts, +5,000 \$25/mo.
- CRM
- Conflicts Checking
- SMS/Text Messaging

- HTML & Plain-Text Email Builder
- Email Marketing Campaigns
- Custom Email Domain
- Full Analytics & Dashboard
- Custom Reporting

The Lite version is \$199/month and includes three users. Pricing for the Enterprise version is available upon request. There is a \$399 one-time setup charge and a 12-month minimum agreement. The time and billing module is an additional \$29/month/user, and a user must have a Lawmatics user account. Reach out to Lawmatics to get custom pricing for your firm.

Who is Lawmatics?

Based in La Jolla, California, Lawmatics was founded by Matt Spiegel and Roey Chasman. Lawmatics offers an end-to-

end legal CRM solution that provides law firms with comprehensive solutions for client intake, marketing automation, and time & billing.

Why Buy Lawmatics?

- Lawmatics allows firms to build their own processes with easy-to-use automation.
- Create customizable forms to collect important information specific to your firm.
- Lawmatics provides a data-driven and highly customizable platform.

Try Lawmatics Today!

Learn about additional features on the Lawmatics website or [schedule a demo](#) to see it yourself. Follow Lawmatics on LinkedIn, Twitter, and Instagram to keep up on changes and improvements to the platform.



Spend Less Time on Admin Tasks, More on Practicing Law, and Get Paid on Time with MyCase and LawPay

“You can automatically generate one or more invoices from time and expense entries and immediately share them with clients via email or SMS. MyCase invoices support Uniform Task-Based Management System (UTBMS) codes and Legal Electronic Data Exchange Standard (LEDES) billing.”

Company Name Brand
AffiniPay, LLC

Product Name Brand(s)
ClientCredit, LawPay, MyCase, MyCase Accounting, Woodpecker

Latest Developments and Updates

- Use the native LawPay Payments integration to set up payment plans for clients and get paid sooner.
- Convert time sheets to invoices with secure payment links and send them to clients via email or SMS.
- Record transactions, manage vendors, chart accounts, and engage bank reconciliations and compliant trust accounting within MyCase.
- Manage, edit, and share cloud-based documents from the desktop with MyCase Drive.

Manage Your Firm with Heightened Efficiency

MyCase all-in-one legal practice management (LPM) software provides efficiencies and time-saving features for busy small and midsize law firms. The software-as-a-service (SaaS) platform manages law firm financial and legal operations, from generating leads and client intake to case management, time and billing, payment processing, and accounting. MyCase includes client portals, document management, and automation with advanced communication and collaboration tools. A dedicated development team drives product advancement, feature improvements, and integrations with third-party software.

Lead Management

MyCase has built-in features to create and track leads and referrals until they become clients. If the client does not retain the firm,

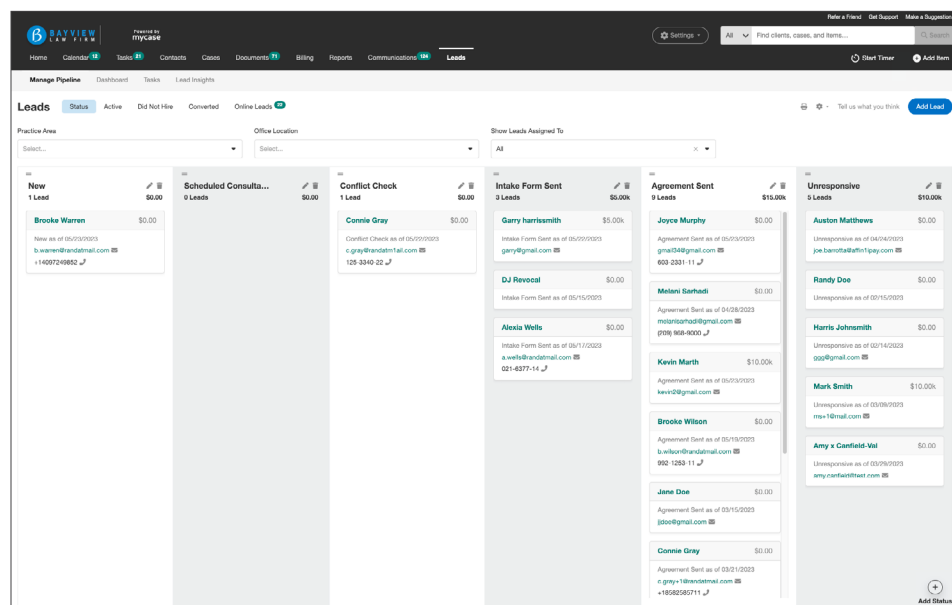


Figure 1: View MyCase leads as cards in a Kanban-style board moving along columnar tasks marking their progression to client status.

“MyCase Accounting allows you to write checks from MyCase and view financial data and banking transactions with case information. You can view the firm’s overall financial health and outlook to gain insight into income.”

use the information for conflict checking or compliance.

You can generate leads using contact and intake forms in MyCase and embed them into a website. MyCase can also set up and maintain your firm’s search engine optimization (SEO) and mobile-friendly website and integrate lead management and other features.

Lead tracking in MyCase includes information on potential case details, communication, and the ability to accept payments for new client consultations. You can also save calendar events, share documents, set tasks, and view the status of leads and referrals. *See Figure 1 on the previous page.*

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 in the web browser user interface (UI) and MyCase mobile apps on Apple iOS and Google Android devices. Whatever you can do in

the web UI, you can do on mobile devices, except for batching and sending invoices.

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

Time, Billing, and Accounting

Time and expense tracking recorded in the web UI and mobile apps accrue to the time and billing section of the appropriate case for invoicing. You can **automatically generate one or more invoices** from time and expense entries and immediately share them with clients via email or SMS. MyCase invoices support Uniform Task-Based Management System (UTBMS) codes and Legal Electronic Data Exchange Standard (LEDES) billing.

With LawPay Payments, send invoices with secure payment links and automatic payment reminders shortly after you complete the work. You can also generate and send safe payment links via email or SMS. If clients prefer to call in payment details, input the information directly into a secure web form.

DATE	VENDOR	ACCOUNT	BILL STATUS	BILL DUE DATE	AMOUNT DUE \$	TOTAL \$	AMOUNT PAID \$	ACTIONS
03/13/2023	Uber Eats	Advertising & Promotion	Overdue	03/13/2023	\$1,050.00	\$1,050.00		Details
02/07/2023	Drew's Vendor	Advertising & Promotion	Paid	02/07/2023	\$100.00			Details
01/05/2023	Drew's Vendor	Entertainment Meals	Paid	01/05/2023	\$55.00			Details
12/05/2022	Uber Eats	Advertising & Promotion	Paid	12/05/2022	\$95.00			Details
09/18/2022	Uber Eats	Office & General Expenses	Paid	09/18/2022	\$100.00			Details
03/14/2022	Uber Eats	Travel	Overdue	03/14/2022	\$103.00	\$103.00		Details

Figure 2: MyCase bill payment dashboard shows the firm’s accounts receivable status.

“ Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents. Send retainers to potential clients for signature using the company's built-in, unlimited, eSignature feature.”

LawPay securely stores credit card and Automatic Check Handling (ACH) payment details and handles compliance with the Payment Card Industry (PCI) security requirements. With ClientCredit, you can offer clients automatic payment plans that pay you 100 percent of the invoiced amount upfront.

When clients pay invoices, the firm's accounts receivable information is updated automatically and reported in a dashboard view. *See Figure 2 on the previous page.*

MyCase maintains trust and credit balances, stores time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees. It supports batch invoicing and the application of trust funds and credit card payments to invoiced amounts.

Automating invoices and client payments saves attorneys time and administrative work. Still, you can save more time and labor with **MyCase Accounting**, a built-in legal accounting system that works with MyCase.

With the accounting module, connect bank accounts and import charts of accounts. The module supports trust accounting compliant with state bar requirements and allows firms to engage in legal-specific bank reconciliation inside MyCase without QuickBooks or Xero. Accounting further supports expense and vendor management, a general ledger, and income insights.

The accounting module connects to all other areas of MyCase, so you don't need to duplicate data to reconcile accounts or track down expense receipts. It's all here

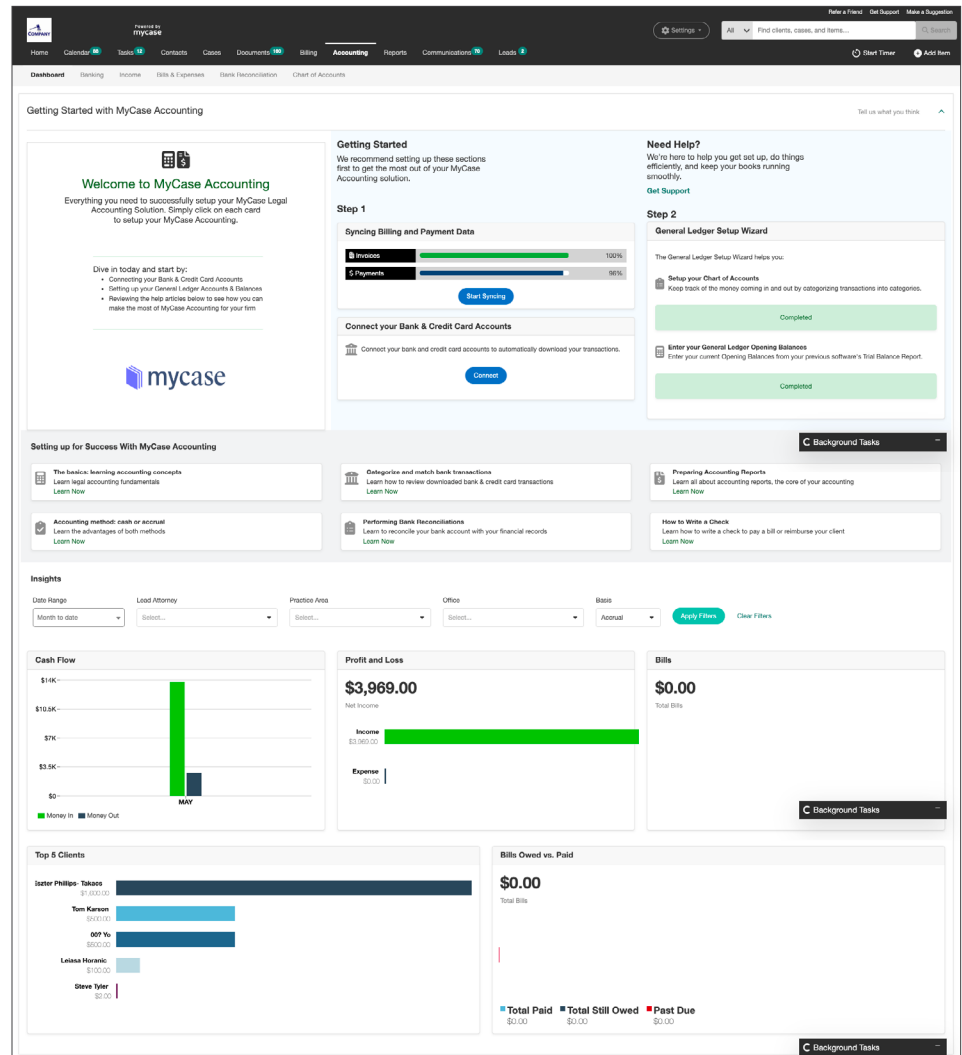


Figure 3: MyCase Accounting module is a snap to set up and gain valuable insight into the firm's financial operation and outlook.

after you enable accounting and import your billing data with a few mouse clicks.

MyCase Accounting allows you to write checks from MyCase and view financial data and banking transactions with case information. You can view the firm's overall financial health and outlook to gain insight into income. *See Figure 3 on the previous page.*

Document Management, Automation, and MyCase Drive

MyCase provides unlimited cloud-based storage for documents and other materials, including forms, invoices, and templates. The LPM automatically converts image-based documents to text and supports full-text search, versioning, and setting default folder structures by case type.

MyCase Drive provides secure desktop access to all documents in the MyCase cloud. There's no need to upload or download copies to work with local applications. The drive allows you to organize files and folders on the desktop using drag-and-drop functionality and syncs document changes between the desktop and MyCase, so you can always work with the most recent version. You can also use the drive with MyCase's client portal to share and sync drafts with clients.

You can use document automation throughout the 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 potential clients for signature using the company's built-in, unlimited, eSignature feature. The e-sign function in MyCase supports multiple signers with a firm countersign.

If you need more powerful legal document automation, use **Woodpecker** to choose templates and quickly fill variables in Microsoft Word-based documents using drop-down menus to select case and court information. Woodpecker can add chunks of text or standard clauses and merge them into documents or use contextual logic to add the content based on user responses.

Reporting

Select from many standard reports to detail firm financials, productivity, contacts, and lead information. MyCase allows unlimited custom fields to track, manage, and report discrete data.

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

Integrations

MyCase is an integrated, all-in-one solution that delivers the necessary components for most small to midsize law firms. It also offers numerous integrations to provide extended functionality for all firms. The LPM software integrates with: LawToolBox to use rules-based calendaring; InfoTrack to electronically file court documents from MyCase; Proof to make service of process easy and efficient; Lawmatics to automate marketing and sync matters and client information; Case Status to communicate case information to clients via a mobile app; and Kenect to text clients, collect reviews, and generate leads.

MyCase synchronizes data with Google, Outlook, and Microsoft 365 calendars and integrates with Intuit QuickBooks Online, Mailchimp, DropBox, Smith.ai, and LEX Reception for legal call reception and messaging. The company is continuously identifying and adding new integrations to help firms make the most of their current software.

Pricing

MyCase costs \$39 per user/month for a Basic plan with cloud-based case management, end-to-end billing, and online payments. For \$69 per user/month, get the Pro plan with more robust firm management, client intake, contact communication, and critical integrations. An Advanced plan with all MyCase features, MyCase Drive, and seamless document editing and storage from the desktop is available for \$89 per user/month.

Affinipay builds LawPay Payments into all plans with no monthly fee and competitive processing rates. Add an SEO-friendly website with a mobile-friendly design for clients for \$100 per month or MyCase Accounting for \$39 per accounting user/month to keep all financial data in one place and conduct three-way trust reconciliation. Woodpecker starts at \$39 per month for two users.

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 helps law firms become more efficient and productive, improving the client experience. Affinipay, the parent company of LawPay, acquired MyCase on June 9, 2022. Led by Dru Armstrong, CEO at Affinipay, the combined company is headquartered in Austin, Texas, with offices in San Diego, California, and Toronto, Canada. It has more than 550 employees serving over 65,000 law firms, with over 200,000 legal professionals across the United States and Canada, generating more than \$200M in annual run rate revenue.

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 is required.
- Add-on modules and custom integrations make MyCase a one-stop shop to manage the business and practice of law.
- MyCase meets customer demands with organic growth, targeted integrations, and strategic acquisitions.

Try MyCase Today!

Start your [free MyCase trial](#) today!

Improve Communication, Automate Activities, and Get More Done with PracticePanther: Law Practice Management Software Made Easy

“You can create payment plans, templates, intake forms, documents, and workflows from the automation menu. PracticePanther also supports conditional workflows.”

Company Name Brand
Paradigm

Product Name Brand(s)
PracticePanther

Latest Developments and Updates

- Place secure, custom links (OneLinks) on websites and in emails, PDFs, and text messages for clients to pay bills conveniently.
- Track and send unlimited e-signature requests.
- Archive contacts and matters without deleting them.
- Import time entries with UTBMS codes that populate in LEDES invoice reports.
- Apply document templates to CSV and XLS spreadsheets.

Stay on Top of Your Practice

Online law practice management (LPM) software **PracticePanther** empowers legal professionals to get more done in less time. The software-as-a-service (SaaS) solution is easy to use from a desktop, laptop, tablet, or smartphone. The top navigation bar displays on every web page, so you can quickly start a timer to track billable time and use the New button to create any object with a few mouse clicks. *See Figure 1.*

You can create payment plans, templates, intake forms, documents, and workflows from the automation menu. PracticePanther also supports conditional workflows. It's as easy as making a list of tasks and configuring the next task contingent on the one before. Dependent

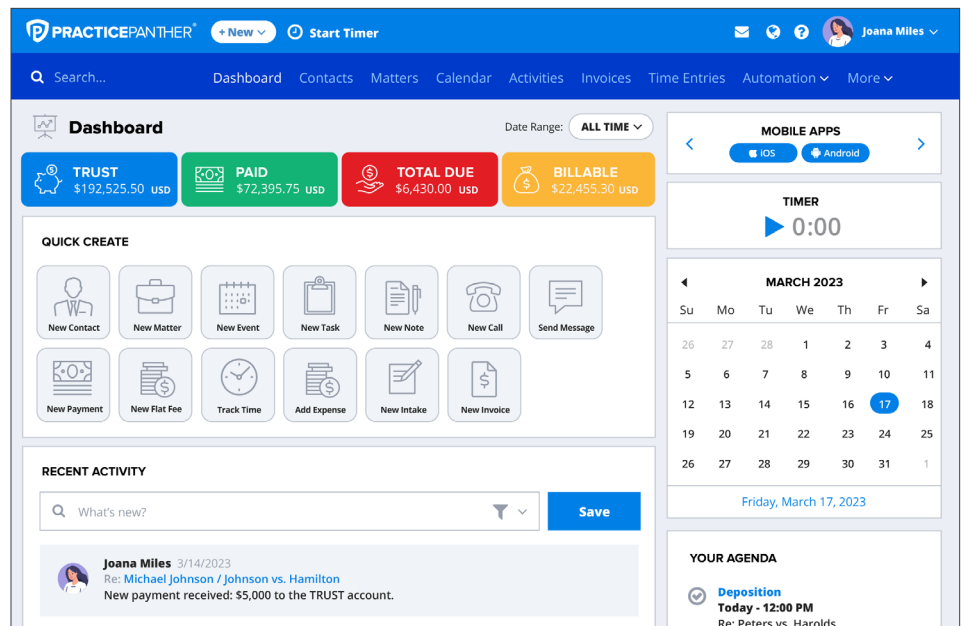


Figure 1: Every page view in PracticePanther sports a navigation bar with a global search function, a New button, and drop-down menu functions for matters, contacts, calendars, time entries, billing, payments, activities, documents, and reports.

PracticePanther’s built-in two-way business text messaging feature tracks and stores all text messages and files between a firm and its clients, keeping an accurate and complete client communication record. Firm staff can also easily track time spent texting clients directly from the same messaging view.”

workflow tasks do not overrun your agenda and calendar because they trigger serially when a previous task is completed, setting an operative task in motion.

The global search in the navigation bar supports conflict searches, which focus on contacts and matters, and you can expand them to activities and notes on demand. Global search output includes previews of suggested results.

Like the navigation bar, you never lose sight of the fly-out, right-side panel that displays timers, tasks, and calendars. Calendars can sync events with Microsoft Outlook and Google Calendar and integrate court rules and deadlines from LawToolBox. PracticePanther allows you to calculate deadlines, court dates, or other critical events with precision. Beneath the calendar in the panel on the right side, click the date calculator, which can account for all US holidays, if necessary. When PracticePanther calculates a deadline, it allows you to create an event or task for the date.

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. If you are working in a public space, use the privacy button in the upper right-hand corner of the user interface (UI) to hide the financials.

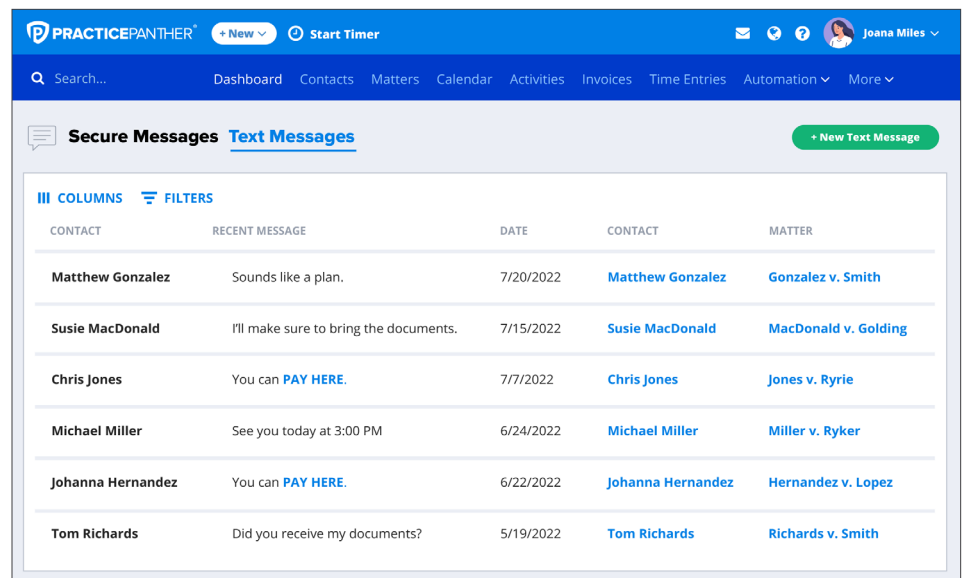
Case Management

The case management dashboard is the bread and butter of PracticePanther; it’s the starting point for the majority of the actions that take place on the platform. This is where you can view case and contact data in one easy-to-use place. PracticePanther connects billing, calendar, correspondence, events, documents, tasks, and time entries to contacts and matters. Add tags to contacts, cases, and events to search, filter, find, and act on multiple objects. You can even batch-apply tags to multiple activities at once. Tags are completely customizable and can be used in a variety of ways, from tracking the performance of practice areas across your firm to measuring the ROI of your latest marketing campaign.

In a pinch, communicate with clients via email and SMS/text, but use client portals to communicate with clients securely. You can also share invoices and OneLinks in client portals.

All your documents and files stored in PracticePanther can be linked at the contact or matter level and found in the case management dashboard. This makes it simple to find necessary case files quickly and keeps your firm organized no matter where you’re working from.

Archive contacts and matters from regular access without deleting them. You can



CONTACT	RECENT MESSAGE	DATE	CONTACT	MATTER
Matthew Gonzalez	Sounds like a plan.	7/20/2022	Matthew Gonzalez	Gonzalez v. Smith
Susie MacDonald	I'll make sure to bring the documents.	7/15/2022	Susie MacDonald	MacDonald v. Golding
Chris Jones	You can PAY HERE .	7/7/2022	Chris Jones	Jones v. Ryrie
Michael Miller	See you today at 3:00 PM	6/24/2022	Michael Miller	Miller v. Ryker
Johanna Hernandez	You can PAY HERE .	6/22/2022	Johanna Hernandez	Hernandez v. Lopez
Tom Richards	Did you receive my documents?	5/19/2022	Tom Richards	Richards v. Smith

Figure 2: Track business text messages received and sent by a law firm.

“Batch and send invoices and payment reminders via email or text, or send clients a OneLink secure payment link. OneLink allows law firms to place a customizable link on their website and in email signatures, PDF files, and text messages that let clients instantly pay bills with a few mouse clicks.”

easily find archived records using additional search filters and un-archive them by changing their status.

Business Text Messaging and Internal Communications

PracticePanther's built-in two-way **business text messaging** feature tracks and stores all text messages and files between a firm and its clients, keeping an accurate and complete client communication record. Firm staff can also easily track time spent texting clients directly from the same messaging view.

A firm chooses one number to send and receive texts, obviating the need for staff to use their mobile phones for work-related tasks. When you click the messages function in the right-hand corner of the navigation bar, PracticePanther lists SMS/text messages received by the firm. See *Figure 2 on the previous page*.

Suppose a text originates from a client's phone number; PracticePanther stores it with the client's materials. If the number is new, PracticePanther creates a new contact profile to associate all communications and activities with that new contact and has the ability to also create a task on the contact level to follow up with the client who submitted the form. In addition to texting

clients, you can securely chat with staff on the web app, which associates a green dot for logged-in users. You can quickly find out what people are working on and the status of matters, tasks, and workflows. A recent activity window provides an overview of the firm's activity—filter the view by date, time, and action.

Custom Document Templates

PracticePanther makes it easy to create, use, and reuse templates for any document, such as an invoice, spreadsheet (CSV, XLS), or intake form. Use variables to insert data from standard and custom database fields into documents, such as #Contact.Email# and #Contact.Website#.

Select a client and matter to apply a template and generate a document to download or send to a client, court, or third party. There are no limits to the number of records you can track and send for electronic signatures from the platform's document management system (DMS). With PracticePanther's built-in electronic signature feature, you can send documents to multiple parties and even select the signing order if required. You will be notified each step of the way when a signature is added, and once they're all collected, the completed document will be sent right back to you. The DMS can

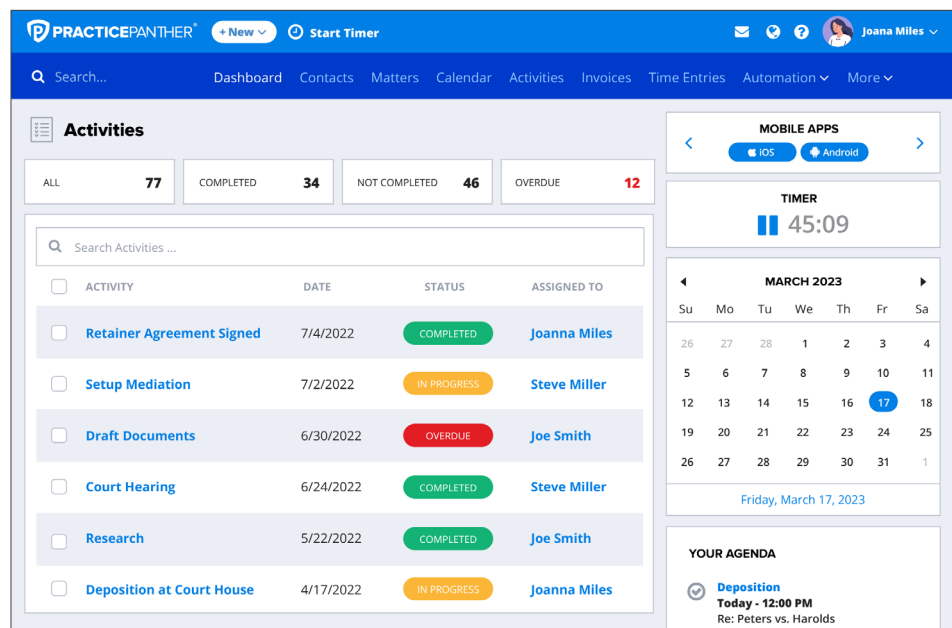


Figure 3: PracticePanther activities report shows completed tasks and time logged. Without leaving the report, you can capture unreported time for billing and make sure nothing slips through the cracks.

integrate with third-party online storage providers such as Box, Dropbox, Google Drive, and Microsoft OneDrive.

Time, Billing, Accounting and PantherPayments

Start timers from any page in PracticePanther and configure multiple timers to switch your attention among them. The most current timer remains active, pausing others. Like most PracticePanther objects, you can simultaneously create multiple timers, so you don't have to repeat information.

If you lose connection with the web app, a running timer will continue until you reconnect and stop it. Time entries support American Bar Association (ABA) task codes and codes for the Legal Electronic Data Exchange Standard to support LEDES billing.

Create a payment plan from a green button action or menu selection. Enter a description, the total amount to pay, the amount per payment, enable repeat if necessary, and choose a frequency. Then select the first charge date, and the client can make payments on their schedule.

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

Batch and send invoices and payment reminders via email or text or send clients a OneLink secure payment link. OneLink allows law firms to place a customizable link on their website and in email signatures, PDF files, and text messages that let clients instantly pay bills with a few mouse clicks. The OneLink payment

experience is like checking out with an online retailer, making for faster, on-time payments and increasing realization rates.

For accounting, PracticePanther supports a one-way integration with QuickBooks Online and TrustBooks. Users of both PracticePanther and TrustBooks can automatically sync matter, deposit, and payment withdrawal data between platforms.

PantherPayments is a payment processing service built into your PracticePanther account. PantherPayments encrypts personal and sensitive data and includes PCI (Payment Card Industry) compliance at no charge. It also complies with IOLTA (Interest on Lawyers' Trust Accounts), ABA, and lawyers' online payment rules in all 50 states. There are no setup costs or hidden fees. The service has industry-low transaction rates for credit card fees (2.9 percent of the transaction) and ACH fees (one percent of the payment).

Reports

PracticePanther provides customizable standard reports for contacts, expenses, invoices, matters, time entries, flat fees, tasks, and payments. For PantherPayments, you can view daily and monthly payment reports, batch transaction fee reports, and ACH deposits. Reports also include payment history, payment plans, and bank accounts, where you can manage accounts, print checks, and print deposit slips.

Find lost time in PracticePanther using an activities report. Review all activities and filter them by those completed for a billing period. The information includes a time log for captured time where you can identify missed time entries and report them. See *Figure 3 on the previous page*.

Like contacts and matters, you can apply tags or labels to reports, then filter them by one or more labels or no selected tags.

Pricing

PracticePanther has flexible annual **pricing plans** for solo practitioners (\$49 per user/month), an Essential plan for law firms on a budget (\$69 per user/month), and a Business plan that includes all the features discussed in this review and migration support (\$89 per user/month).

Who is PracticePanther?

PracticePanther is a leading all-in-one legal practice management software solution. Founded in 2012, the company has grown at unprecedented rates and serves tens of thousands of customers in 170 countries. The company designs its SaaS solution as a 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?

- PracticePanther is an all-in-one software with an intuitive, user-friendly interface to manage complex matters.
- Built-in, low-cost payment processing service through PantherPayments.
- 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 app.
- Create custom OneLinks for clients to pay bills with a few mouse clicks.

Try Practice Panther Today!

Sign up for a 7-day free trial or **get a demo** and 10% off the first year of a PracticePanther Business plan.

Rocket Matter Brings Enterprise-grade Law Practice Management to Any Size Firm

“Time tracking tools are available on the web and in Office 365 apps, including Outlook and Word. You can share invoices via email and client portals, and clients can use a secure web link to pay via credit card or electronic check (ECH) with Rocket Matter Payments.”

Company Name Brand
ProfitSolv Corporation

Product Name Brand(s)
Rocket Matter by ProfitSolv

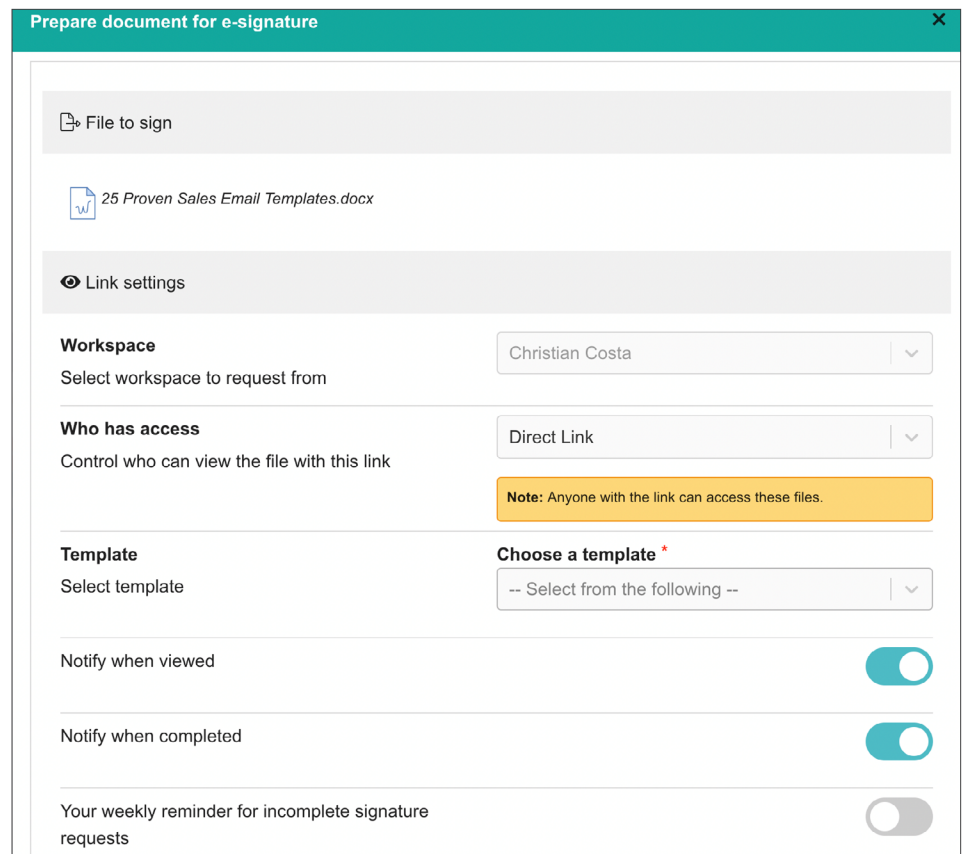
Latest Developments and Updates

- Quickly and securely send files and electronic signature requests to clients.
- Develop and maintain enduring relationships with modern [client relationship management \(CRM\)](#) software.

- Manage law firm financials and maintain profitability with business intelligence and advanced reporting tools.

Rocket Matter Takes Off with ProfitSolv

Rocket Matter is a law practice management (LPM) Software-as-a-Service (SaaS) provider and part of ProfitSolv's software suite for professional service organizations. Since ProfitSolv acquired Rocket Matter in 2020, the professional services software provider has enhanced and added functionality to the LPM software by leveraging its other



Prepare document for e-signature

File to sign

25 Proven Sales Email Templates.docx

Link settings

Workspace
Select workspace to request from
Christian Costa

Who has access
Control who can view the file with this link
Direct Link

Note: Anyone with the link can access these files.

Template
Select template
Choose a template *
-- Select from the following --

Notify when viewed ☒

Notify when completed ☒

Your weekly reminder for incomplete signature requests ☐

Figure 1: Rocket Matter’s dialog box to request an e-signature allows you to create or select a template, such as a client retainer, add signature fields, and configure other parameters, including a secure link, notifications, reminders, and special instructions.

“Rocket Matter has hundreds of granular-level permissions that limit user and group access to features and content and can protect the firm in many ways.”

solutions, including LexShare, by Mango Practice, for secure file-sharing and electronic signatures and integrated CRM.

File-sharing and Electronic Signatures: Fast, Simple, and Secure

You can [send files to clients and request electronic signatures](#) securely from the web application or the Microsoft Outlook plugin. In the app, right-click one or more files and send them to one or multiple parties with bulk controls using another right-click. Recipients can open and sign documents from a smartphone, tablet, or desktop computer. Contacts and clients can sign and return files using a secure upload link, and Rocket Matter saves the files in the corresponding matter workspace. You can set secure links to expire, password-protect and encrypt files to protect client confidentiality, and request files from contacts. Rocket Matter file-sharing features include secure client portals. *See Figure 1 on the previous page.*

Legal CRM

Rocket Matter’s Legal CRM allows you to create automated marketing campaigns, intake clients, and maintain strong client relationships. Rocket Matter can send potential clients a personalized follow-up email or SMS text if you miss their telephone call or email.

The CRM tool supports text message automation, allowing staff to send text messages and document links to contacts from their computers. Send contacts or

leads customized intake forms by practice areas that populate the data into Rocket Matter, saving time and reducing errors. Convert a lead to a client by sending a one-click link to a client retainer with an e-signature request. When potential clients contact the firm, track their progress from marketing campaigns to a signed retainer. View marketing campaign metrics and new client reports.

Project Management with Kanban Boards and Automated Workflows

[Legal project management in Rocket Matter](#)

empowers you to develop reusable templates and apply them to cases to automatically generate tasks and staff assignments, create trust accounts, and populate matters with custom fields. Templates can also fix the case type and billing preferences and engage workflows.

View workflows and case progress in charts or Kanban boards, where you can drag and drop matters to update status. Every case follows a series of steps from intake to resolution that is easily mapped onto a Kanban board to track progress in columnar format. Rocket Matter can trigger task assignments and notify staff when you drag and drop a case from one column to the next. *See Figure 2.*

Business Intelligence

Build custom reports with Rocket Matter’s Business Intelligence module. The tools allow you to mix and match data and report it to make more informed decisions,

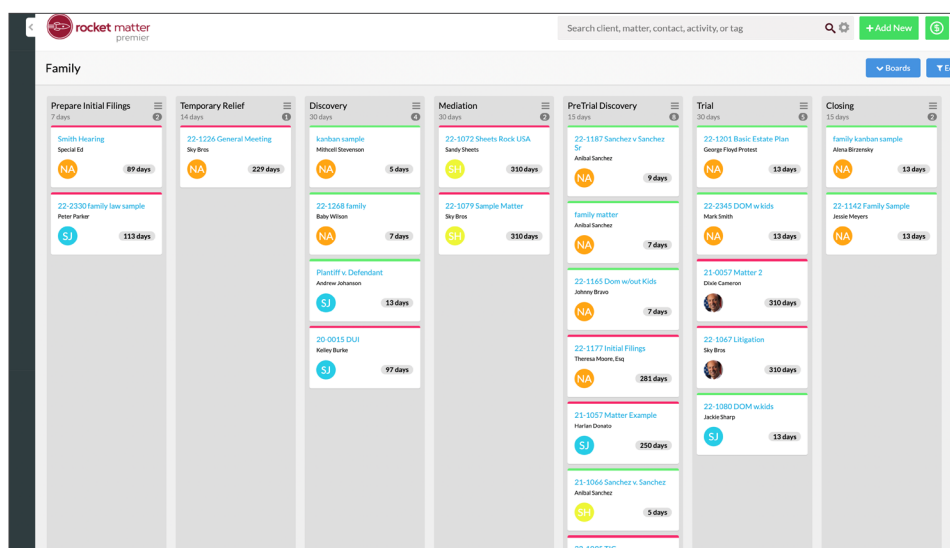


Figure 2: Rocket Matter’s Kanban board view of cards representing cases arranged in columns or stages from initial filings to trial and closing. Each card displays the matter name, the primary attorney, and the number of days in the status.

“Rocket Matter’s Legal CRM allows you to create automated marketing campaigns, intake clients, and maintain strong client relationships.”

find opportunities, and increase profits. Use key performance indicators (KPIs) such as throughput rate, average case value, and the amount of time it takes to complete a matter from start to finish.

The graphical UI makes it easy to build reports using a panel of five data sets and their associated fields, including custom fields and tags. 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. *See Figure 3.*

Tags also appear in the left panel to add to report criteria. Apply tags to objects, such as matters, events, tasks, and time slips.

Time, Billing, and Prebills

Time tracking tools are available on the web and in Office 365 apps, including Outlook and Word. You can share invoices via email and client portals, and clients can use a secure web link to pay via credit card or electronic check (ECH) with Rocket Matter Payments. Some high-end billing features include holding fees and costs from invoices and placing holds on invoices with one click. Apply fixed percentage discounts, convenience fees, and interest rules to invoices and debit trust accounts to pay current charges. Rocket Matter supports client and matter-based trust accounting. CosmoLex by ProfitSolv can

manage a law firm’s bookkeeping and accounting work in a single legal accounting software program if you need a full-featured accounting package.

You can draft prebills for review, generate invoices, and run reports from the billing options page in matters. Set up regular prebills and notify reviewers and timekeepers when they are ready to be checked. Reviewers can make any necessary changes on Rocket Matter’s prebill page. For example, reviewers can change rates, add overlooked activities and time entries, apply discounts, and take bulk actions to approve, hold, download, print, and invoice clients. If you delete a prebill, 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.

Security

Rocket Matter has hundreds of granular-level permissions that limit user and group access to features and content and can protect the firm in many ways. For example, many insurance defense firms use LEDES (Legal Electronic Data Exchange Standard) billing. Clients may automatically reject LEDES invoices or line items that use unapproved billing codes. With the breadth and depth of permissions, Rocket Matter can prohibit timekeepers from using unapproved billing codes and even warn users if they describe a task that may lead to an automatic invoice rejection.

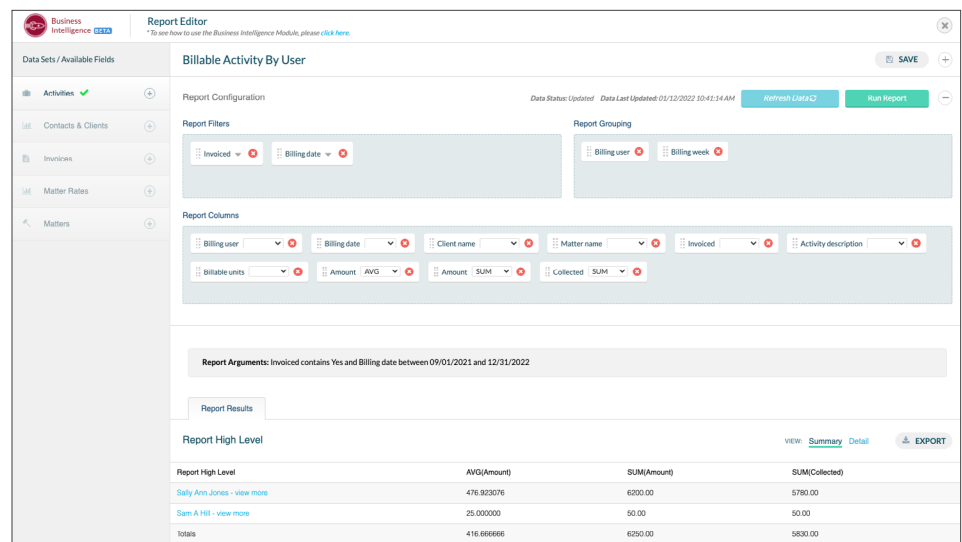


Figure 3: Build custom reports with Rocket Matter’s business intelligence tools. After you select the criteria, run the report and see the visual results below. Use the top boxes to add filters and grouping criteria and the bottom box to add report columns.

Integrations

Rocket Matter supports an 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 an Outlook plugin, track time spent on email, synchronize Outlook contacts and calendars with Rocket Matter, and save emails and attachments directly to matters in Rocket Matter. Other integrations include Box, Dropbox, Evernote, QuickBooks Online, LawToolBox, Ruby Receptionist, Smith.ai, and Gmail and Google Calendar integration. Google Workspace is on the road map.

Rocket Matter added support for Microsoft single sign-on (SSO) and the capabilities to synch Microsoft Outlook private events and OneDrive. The OneDrive sync is bidirectional. OneDrive creates a folder for the client workspace when you make a matter. When you save documents in the client folder, they appear in the web app, which also

provides a widget to use Microsoft Word online to create and share documents.

Pricing

Rocket Matter sells its software direct using predictable and competitive [subscription models](#). It offers three plans in tiered feature packages, ranging from basic features for law firms to get started with LPM and time and billing, to a full-feature plan for firms with enterprise needs. Essentials, Pro, and Premier plans cost \$39, \$69, and \$89 per user per month, respectively.

Who is Rocket Matter?

Rocket Matter is a cloud-based practice management, legal billing, and payment processing software provider based in Boca Raton, Florida. Since 2007, the company's eponymous software-as-a-service has helped make law firms productive and profitable. Rocket Matter is part of the ProfitSolv suite of practice management tools for professional service practices, including marketing and client

intake, payment processing, file sharing, and electronic signatures. With ProfitSolv, Rocket Matter has more than 500 employees who support more than 100,000 professionals in more than 250,000 matters and projects.

Why Buy Rocket Matter?

- Share files with clients and request signatures quickly and securely using a secure link or client portal.
- Business intelligence tools sift through data so a firm can make better and more informed decisions.
- Advanced reporting tools and Kanban board views keep cases on track and help a firm maintain profitability.
- Generate prebills on a schedule for timekeepers to edit and review to avoid invoice rejection and get paid sooner.

Try Rocket Matter Today!

See why Rocket Matter is the ideal LPM software for law firms that want to run an efficient, profitable business. [Schedule a free demo](#) today to learn more!

SmartAdvocate Version 2023 Adds 100+ New Features and Enhancements to Get “More Smart” About Litigating and Settling Personal Injury and Mass Tort Cases

“Along with case status indicators, SmartAdvocate now allows you to create an unlimited number of tags or labels and apply them to cases and documents. Like case status indicators, you can use case tags to trigger automation procedures and use them to organize and search cases and records.”

Company Name Brand
SmartAdvocate, LLC

Product Name Brand(s)
SmartAdvocate

Latest Developments and Updates

- Apply custom tags to organize and search cases and documents.
- Use fillable client questionnaires without third-party software.
- Upload documents and share them externally with secure links.
- Give partner law firms access to referral portal.

All the Case Information You Need

If you're a personal injury or mass tort attorney, you need to look at [SmartAdvocate](#), a legal case and practice management platform developed by a plaintiff's attorney. It allows firms to manage, store, classify, and communicate information on all aspects of cases in personal injury, mass tort, and other practice areas.

The SmartAdvocate web-based user interface (UI) maximizes the amount of information on one screen, putting data in a user-friendly format that does not confuse or intimidate your team. *See Figure 1.*

You can work on any item in a dashboard or list view with a right-click, such as setting or canceling a calendar event, editing a case task, or marking one complete. You can filter information and choose the columns you want to display. Helpfully, SmartAdvocate remembers the last view of a dashboard or panel when you exit and return.

With SmartAdvocate's version 2023 update, you can design data visualizations, display them in custom panels, and create a list of cases for quick navigation and review. From a list view of select cases, a supervising attorney or other reviewer selects the Mass Update feature and chooses the Add to Review List and Open First function to navigate between the case

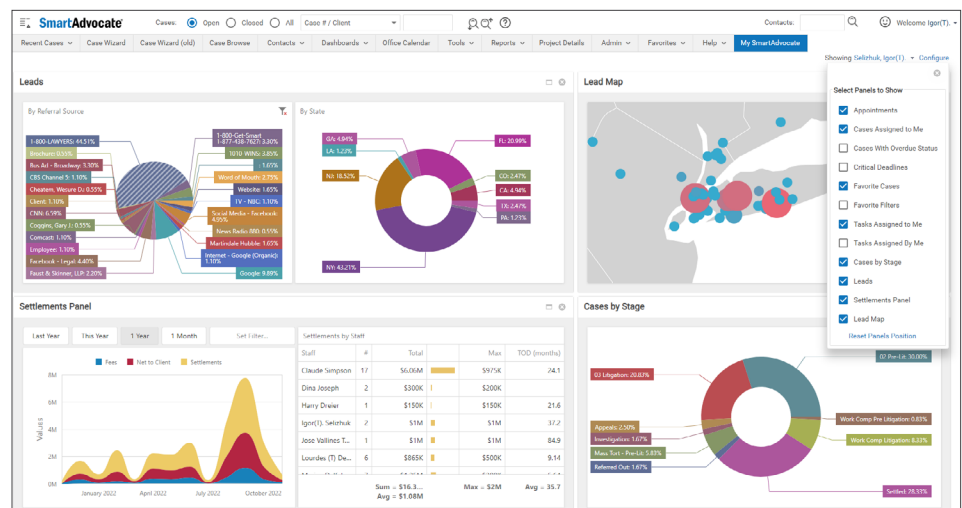


Figure 1: The SmartAdvocate dashboard lets you choose from out-of-the-box and custom panels to display case information in rich text and data visualizations.

“When you share a document with an external user, they can review, edit, and optionally upload it into the DMS, overwrite the existing copy, or create a new one.”

list using forward and back buttons. A reviewer can add a note or task while staying in the context of the case review.

Along with case status indicators, SmartAdvocate now allows you to create an unlimited number of tags or labels and apply them to cases and documents. Like case status indicators, you can use case tags to trigger automation procedures and use them to organize and search cases and records. Create global tags or limit them by case group or type.

Document Management

SmartAdvocate has a full-featured Document Management System (DMS). You can view detailed columnar metadata on case documents, including tags, from a list view. See Figure 2.

In addition to SmartAdvocate’s document organization in default categories and subcategories, you can now create custom folder structures. When you share a document with an external user, they can review, edit, and optionally upload it into the DMS, overwrite the existing copy, or create a new one.

There are numerous ways to get documents into the DMS. Drag-and-drop files from your desktop and scan documents with barcodes directly into the DMS for easy document transfer and tracking. SmartAdvocate includes an add-in for Microsoft Word to easily **create**

templates for document assembly. You can effortlessly embed any SmartAdvocate field into a document template. Once you’ve generated a document from a template using a client’s directory information and case facts, SmartAdvocate automatically saves it to the DMS. SmartAdvocate also supports email and text (SMS) templates that assemble standard text with client and case data.

Tracking Leads and Referrals

Case intake is done seamlessly in SmartAdvocate with a case wizard. The wizard prompts you to get answers to required and conditional questions from a lead, track referrals and marketing campaigns, and automatically calculates 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.

The 2023 update to the case wizard lays out new cases on a web page to add information, including medical providers and insurance, and check for conflicts. Since the intake page exceeds a browser window, as you move down the page, navigation points remain sticky at the top of the browser for you to quickly move about the page without scrolling.

You can now share a link with a partner law firm that gives them a live view of all the cases it referred to or received from your

Icon	Date	Description	Tags	Category	Sub-Category	From	To	Action
	1/25/2023 7:40 PM	Settlement Memo B Test 2		Application	Test	SmartAdvocate, LLC		
	1/29/2023 2:08 PM	Letters - Case Opening - Automobile Case - SA		Plaintiff	Letter	SmartAdvocate, LLC		
	1/19/2023 1:59 AM	(PDF version of) Letters - Case Opening - Automobile Case - SA	Final	Plaintiff	Letter	SmartAdvocate, LLC	Arcana, Sharik	
	1/19/2023 11:51 AM	Letters - Case Opening - Automobile Case - SA	Draft	Plaintiff	Letter	SmartAdvocate, LLC	SmartAdvocate, LLC	
	1/13/2023 2:54 PM	Product Copy	Important, Do not Share	Sales Numbered Documents	Plaintiff Products	SmartAdvocate, LLC	SmartAdvocate, LLC	
	1/6/2023 2:20 PM	MRI Rec Download (download (rename))		Medical	Invoice With Records	Abbeville General Hospital	SmartAdvocate, LLC	
	12/7/2023 1:01 PM	Auto-gen Email	Do not Share	Medical	Letter	SmartAdvocate, LLC	Good Samaritan Memorial Hospital	
	12/7/2023 12:16 PM	Letters - Extract Images from ZIP		Plaintiff	Letter	SmartAdvocate, LLC		
	12/6/2023 2:02 PM	Send for e-Signature (Access/Sign)	Important	Plaintiff	Letter	SmartAdvocate, LLC	Abbeville General Hospital	
	12/6/2023 2:31 PM	Letters - Send for e-Signature (DocuSign)		Plaintiff	Letter	SmartAdvocate, LLC		

Figure 2: SmartAdvocate’s DMS makes it easy to find relevant case documents by filtering columnar data, such as category and subcategory, and searching tags and text in document descriptions. Right-click a file in a list view to edit, send via email, convert to PDF, or take other actions.

“You can now share a link with a partner law firm that gives them a live view of all the cases it referred to or received from your firm. In the law firm portal, the partner firm can add notes to their referrals while your firm has complete control to update referral status and other information.”

firm. In the law firm portal, the partner firm can add notes to their referrals while your firm has complete control to update referral status and other information. Unlike adding co-counsel access to one or more cases, the firm portal does not require additional licensing and costs.

SmartAdvocate provides more than 90 standard reports available from a pull-down menu. Version 2023 adds a report search function to find hidden gems like Cases With No Recent Activity and Cases With Long Time in Status.

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.

The quick-search box also allows you to search text and numbers with wildcards in selected fields such as a 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. You can easily update a case without derailing your current focus. Select a matter to open for a comprehensive view of all the relevant case information. See *Figure 3*.

Detailed information in panels lists the staff working on the matter, pending appointments, plaintiffs, critical deadlines, notes, tasks, and court and docket information. Add a panel item from the upper right-hand corner and edit or delete an item from its list view. If a case includes a critical note, a pop-up window displays that information—such as "don't speak to the husband."

Integrations

SmartAdvocate continues to support Get Smart apps for Apple iPhones and Google Android. SmartAdvocate has [new and updated integrations](#), including CourtRoom Sciences, ProofServ, and Twilio. The latest version no longer requires third-party software to develop client-fillable questionnaires for intake and other fact-finding inquiries. In SmartAdvocate 2023, you can share a web link to a custom user-defined field (UDF) page with clients and collect data directly to SmartAdvocate. The UDF page supports an optional expiry date and password.

With SMTP (Simple Mail Transfer Protocol) integration, SmartAdvocate can automatically send emails from systems like Microsoft Office 365, Exchange Server, or Gmail. It has a Microsoft Outlook desktop add-in to save messages and selected attachments in the DMS or the case note section. In the new version, the company expands its Microsoft

The screenshot displays the SmartAdvocate software interface. At the top, there's a navigation bar with tabs for 'Cases', 'Open', 'Closed', 'All', and 'Case # / Client'. Below this, a sidebar on the left contains various icons for navigation: Summary, Calendar, Costs, Critical Deadlines, Case Value, Defendant, Documents, Photographs, Emails, Inquiries, Insurance, Insurance Providers, Medical Chronology, Negotiation/Settlement, Notes, Plaintiff, Tasks, WorkPlans, Vehicles, and Shared Forms. The main content area shows a detailed view of a case titled 'IS210404-Basic, Plaintiff - Careless, Driver'. It includes a photo of the plaintiff, a list of staff (Attorney: Selizhuk, Igor(T); Primary Paralegal: Bldy, Nataliya; Intake Specialist: Fishman, Amy), pending appointments, and a list of plaintiffs and defendants. The 'Last Notes' section shows a series of messages and updates related to the case.

Figure 3: The SmartAdvocate comprehensive case view allows you to add custom summary information at the top, below the case name and number, and configure the top panel that remains visible on all case pages.

Outlook desktop plugin to support an email-monitoring service. Configure an Outlook mailbox for monitoring, and the service identifies a case number in the subject field of the email and automatically sends it to the respective SmartAdvocate case. The company also released an Office 365 plugin.

Besides support for multi-factor authentication, you can now access SmartAdvocate using single sign-on (SSO) with SAML (Security Assertion Markup Language) integration. SmartAdvocate supports electronic signatures powered by AssureSign, DocuSign, and OnTask.

Deployment and Pricing

SmartAdvocate has many license options for its web-accessible cloud and on-premises server versions. SmartAdvocate Server 2023 requires .NET Framework 4.8 and Microsoft SQL 2014 or later. Contact a business development specialist at 1-877-GET-SMART (1-877-438-7627) to discuss the best option for your law firm.

Who is SmartAdvocate?

SmartAdvocate, based in Melville, New York, with an office in Bonita Springs, Florida, develops and distributes its award-winning personal injury case management software. Jerry S. Parker of Parker Waichman **developed the software** when he found no other product offering suitable for plaintiff-side PI and mass tort cases in addition to other firms with a litigation practice. Law firms of all sizes and practice areas throughout the US, Australia, and Canada use SmartAdvocate. The company continues developing the software organically, winning awards from the New York, New Jersey, and National Law Journals. **SmartAdvocate version 2023** introduces more than 100 new features and enhancements.

Why Should You Consider SmartAdvocate?

- Use a web browser to manage cases with accessibility from virtually anywhere, whether you use the on-premises server or the cloud option.

- Easily create templates from the documents that your firm already uses with over 2,500 merge codes for any information stored in a case.
- Keep track of critical case information and vital firm financial and operational details with dozens of dashboards featuring data visualizations and reports, which you can also receive via email.
- Provide clients instant access to relevant case information, including documents, the case calendar, notes, and more, with the SmartAdvocate Client Portal, freeing staff time for other responsibilities.

Try SmartAdvocate Today!

There are lots of reasons why clients pick SmartAdvocate over any other choice. Find out why by calling 1-877-GET-SMART or visiting www.smartadvocate.com. ■



ZenCase Solves Complex Problems for Law Firms, Improves Lawyer Productivity, and Increases Work Product with Less Effort

“The software can predict and prepare a suggested timesheet for users in the background based on calendar items and time spent on client tasks, such as email and document generation. Alternatively, the system can pop up an alert and remind you to record time spent on a client task.”

Company Name Brand

Groundswell Productivity Solutions, LLC,
d/b/a ZenCase

Product Name Brand(s)

ZenCase

Latest Developments and Updates

- ZenCase has developed Automated Time Manager™ technology to recommend matter and client billing based on actual work done and meetings.
- Deeper integration with NetDocuments, providing increased automation and workflows around client intake and document creation.
- A phone app is in development to improve mobile access to ZenCase.

Tackling Your Challenges

ZenCase cloud-based law practice software aims to resolve complex problems facing midsize to large law firms. The software-as-a-service (SaaS) solution addresses information overload, relieves client pressure to produce more work products in less time, and accommodates complex and evolving billing arrangements.

Dashboards, Search, and Key Functionality

Your experience in ZenCase begins with customized dashboards. Any information that ZenCase collects and stores, and you have permission to view, can be displayed in rich data visualizations. For example, you can drill down to analyze specific details on firm financials and productivity. See Figure 1.

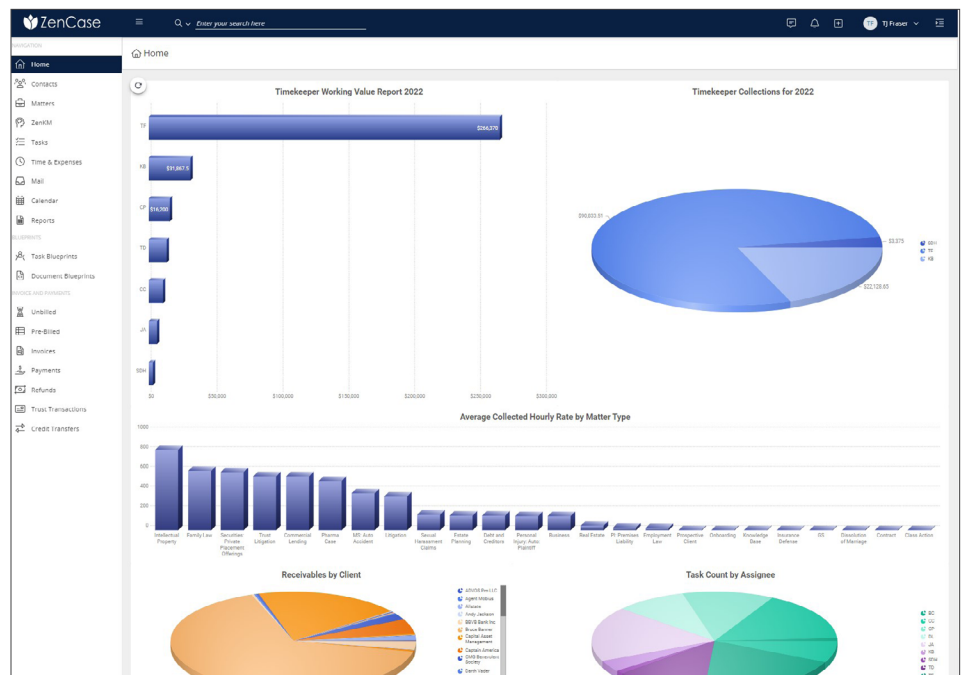


Figure 1: Landing pages display configurable, data-driven dashboards. Here, timekeeper data is displayed by working value, annual collections, collections by matter type, receivables by a client, and task count by the assignee.

“ You can create custom records & dynamic questionnaires to automate complex documents with client data, such as compliant regulatory filings.”

ZenCase enforces a single-click rule—as many actions as possible should result from a mouse click to reduce effort and save time. You can quickly look up anything in the system using a search window atop the user interface (UI) and access the support desk, get notifications, and quickly add content to the system. The quick-add function creates matters, contacts, tasks, expenses, and time entries. Use a ZenKM (Knowledge Management) feature to create and record case-related information, such as a memo or telephone message.

You can also access favorites, bookmarks, and start timers to record billable work, but creating and stopping timers is not necessary for ZenCase. The software can predict and prepare a suggested timesheet for users in the background based on calendar items and time spent on client tasks, such as email and document generation. Alternatively, the system can pop up an alert and remind you to record time spent on a client task.

The left panel of the UI provides navigation to various ZenCase functions. The system manages customer relationships, tracks all connections (including individuals and organizations), and shows how they connect to matters and each other. You can also manage case knowledge using the ZenKM function, apply case filters, or access a specific matter where the KM feature appears in a tab.

Extensive Matter Information

A firm must have all information on a matter in one place without overloading the UI with data and overwhelming users. The [ZenCase matter UI](#) accomplishes this mission, bringing a matter into focus with all related material and contacts without creating information overload.

A matter summary is displayed across the top of the UI, including name, number, originator, manager, client, status, and matter type, with a separate tab of summary billing data. More detailed billing and other content information appear in a tabular format underneath the top. Beneath that, there are tabs for tasks, memos, files, charges, billing, mail, trust transactions, credit transactions, ZenKM, and more.

The [ZenKM function](#) can manage all case or firm-related knowledge and information.

The knowledge management UI includes tabbed or card displays of subjects, facts, questions, answers, authorities, connections, documents, and memos, where each tab has columnar data for various fields. You can create custom records and dynamic questionnaires to automate complex documents with client data, such as compliant regulatory filings.

Users can access two document libraries. One library contains law firm documents, and the other is a Groundswell library containing ZenCase-curated documents. You can create document templates or blueprints incorporating client data and add them to any matter.

The [ZenCase Chrome Extension](#) can create and link objects, such as tasks, questions, authority, documents, and emails. You can use a browser like Chrome or Microsoft Edge to connect and find information in context and sourced to reference or resource material. Create a subject in ZenKM and click the link icon on the item to join facts, questions, answers, and other elements. Each link can support an internal URL to a ZenCase source—like a matter or contact, or an external resource such as LexisNexis, Westlaw, or another internet resource. ZenKM is very useful for organizing trial or deposition flow, with links to supporting documents or references. You can quickly create a ZenKM item from the top menu bar, add it to a matter with a question, and assign it to an associate. Click the eye icon on a line item in the grid view and quickly find any open tasks or questions.

You can clone matters to create new ones or clone matter types to reuse. All matters can import tasks and Task Blueprints to reuse work and automate workflows.

Tasks and Task Blueprints

ZenCase supports project management using tasks and Task Blueprints. You can create a task, link it to an item, such as an email or memo, and assign it to an associate. The related resource stays with the task for easy reference.

Tasks support predecessor-successor logic (dependencies) that, when linked together, create a workflow or project. Establish start and completion dates, like a court filing date, which can then be saved to the task owner's calendar. Priority, fee type, budget

“Create a subject in ZenKM and click the link icon on the item to join facts, questions, answers, and other elements. Each link can support an internal URL to a ZenCase source—like a matter or contact, or an external resource such as LexisNexis, Westlaw, or another internet resource. ZenKM is very useful for organizing trial or deposition flow, with links to supporting documents or references.”

amount, tags, and other parameters can also be set. Tasks may be viewed in a list view or Gantt chart view. See Figure 2.

Time, Billing, and Accounting

ZenCase reduces the time and effort spent on firm financials and brings visibility to client, matter, and firm-wide billing and collections. You can quickly add an expense record and assign it to a matter, adding any related information as an attachment, such as a receipt or itinerary. ZenCase can enforce rules on expenses and time records to meet client budgets and requirements.

ZenCase supports Legal Electronic Data Exchange Standard (LEDES) billing, and variable LEDES code sets to apply to timesheets and invoices. You can also require Uniform Task-Based Management System (UTBMS) codes.

Generate prebills by matter, originator, or managing partner, and review, edit, and approve invoices in real time. ZenCase supports split-fee billing and alternate billing contacts. Send invoices via email with options to include client, matter, or invoice summaries and customized cover letters. The system supports trust accounting, client refunds, can allocate payments to expenses first and then pay multiple invoices, and supports pay when paid, which is ideal for the firm wanting to pay service providers after receiving payment from the client.

ZenCase uses QuickBooks Online Plus or Advanced subscriptions to ensure that firms handle financial transactions correctly and to view financial statements, such as income statements and balance sheets. With QuickBooks, track classes and locations to organize transactions and set the firm member as the class to give you deep insights into expenses and profitability per member. Most will manage firm financials, including billing, collections, trust balances, and reporting from within ZenCase, where you enter client information only once, and the data synchronizes to QuickBooks.

Reporting

ZenCase has two types of reports: standard and custom. Standard reports support all firms, such as aging client and matter accounts receivable, client invoices and payments, collections overview, time entries, and more. Use filters on standard reports to display complex data without SQL search queries.

With a custom report builder, create any report on any aspect of the firm using ZenCase's intuitive interface to InsightSoftware's Logi Analytics (formerly Exago) to select and report on various fields.

ZenCase uses role-based permissions to secure data from unauthorized access. You can create security groups or assign permissions at the individual level,

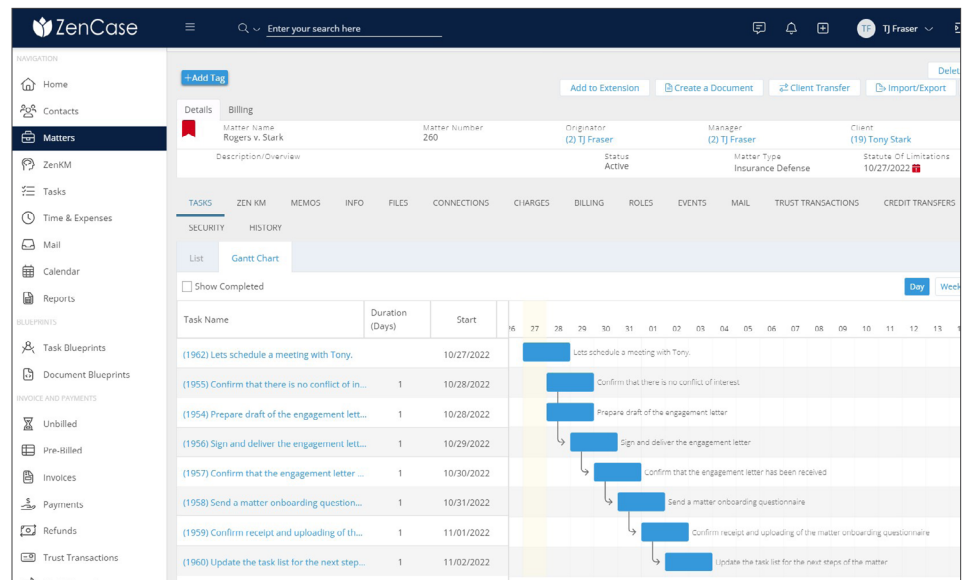


Figure 2: Create projects in ZenCase using task dependencies and display them in Gantt charts where you can identify bottlenecks and work stoppages.

including the ability to create, view, update, and modify objects in ZenCase, such as blueprints, contacts, matters, and more.

Public Cloud and Integration

ZenCase uses a multitenant software architecture in Amazon Web Services (AWS). The SaaS platform supports an application programming interface (API) to [integrate](#) popular cloud storage repositories, including Box, Microsoft SharePoint, and NetDocuments. See [Figure 3](#).

Once an administrator enables a cloud storage integration, each ZenCase member can create clients, matters, and work documents in the repository. Otherwise, ZenCase does not include storage services.

Connect a Microsoft 365 Business or Enterprise account to ZenCase to use Outlook in ZenCase and manage your calendar and contacts within each client and matter. With bidirectional synchronization, ZenCase work will appear

in Outlook online, on the desktop, and on the mobile app.

Pricing

ZenCase costs \$999 per user per year. ZenCase will migrate your data from a CSV file or SQL table for free. For more complex data migrations, ZenCase uses certified consultants to help you prepare and migrate data. ZenCase provides data migration and customization credits with a three-year agreement.

Who is ZenCase?

Jacksonville, Florida-based Groundswell Productivity Solutions, doing business as ZenCase, makes its namesake cloud-based law practice management system for lawyers to find better ways to solve complex problems, create work product in less time and effort than other solutions, and reduce administrative overhead. Thomas J. Fraser, Jr., CEO and founder, leads ZenCase with an [advisory team](#) experienced in finding better ways to solve complex problems. The company has

more than ten full-time employees and certified consultants to maximize law firm productivity with ZenCase.

Why Buy ZenCase?

- ZenCase brings all data to bear in solving complex client problems by effectively managing firm, client, and matter information for easy access.
- Easy-to-use UI supports customer relationships and project management with task dependencies and automated workflows.
- Create tasks in context with email, documents, and other ZenCase objects, including evergreen references and attachments.
- Integrate with popular cloud-based storage solutions, QuickBooks Online for accounting, Microsoft 365, LawPay, and other useful tools.

See ZenCase Today!

See how ZenCase can bring Zen into your law practice and make it more productive with less work. [Request a demo today!](#)

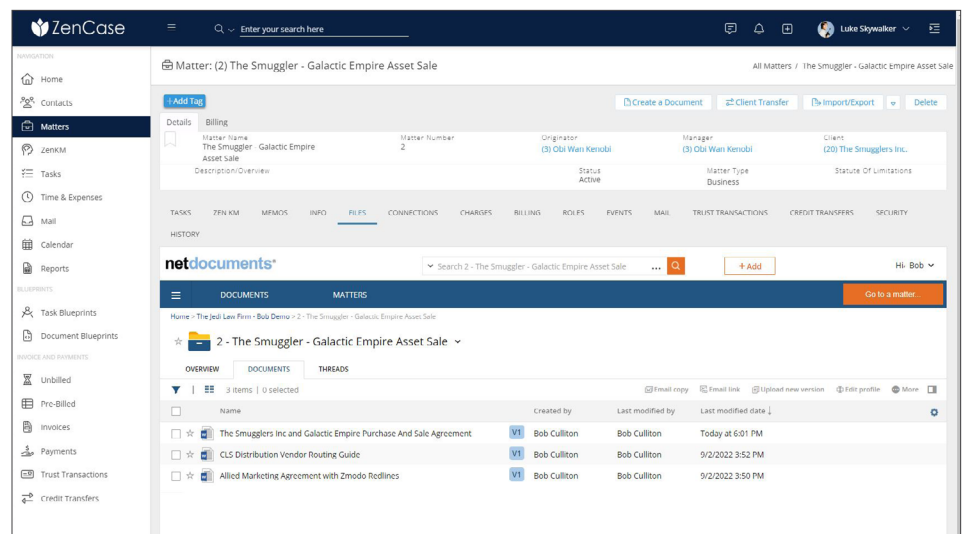


Figure 3: The ZenCase matter interface brings together all matter data without clutter or information overload. The files tab displays all the documents associated with the matter; in this example, they are stored through the integration with NetDocuments.

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