# Practice Management by Practice Area 2022 Buyer’s Guide

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Welcome to Legal Tech Publishing’s 2022 Practice Management by Practice Area Buyer’s Guide
By: Cathy Kenton and Brian Dalton


Practice management software is the backbone of your firm. So, we’re helping you ensure it’s well adapted to your areas of focus.

Building on our previous Practice Management Buyer’s Guide, we’re pleased to offer this primer on how the latest software can help you succeed in a variety of practice areas.

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

In addition to the Guide, you’ll also find the latest category content, a product directory, and the ATL Non-Eventcast podcast series that has already garnered more than 2,500 downloads on the accompanying Above the Law landing page.

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

To your success,

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

Brian Dalton, SVP, Breaking Media
CosmoLex®

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.
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](image_url)

*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.
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.

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

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.

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**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.
Business

MOXO
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

ZenCase
Next Generation, Cloud-Based Law Practice Software That Makes Everyone’s Job Easier
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

Enable a secure, branded business service hub for your legal organization on mobile and web — with built-in client interaction workflows to support your business processes and streamline practice management.

Client interaction workflows for delivering your business service

Moxo helps you streamline your business service processes to deliver modern client experiences. Customize document-heavy workflows to automate routine tasks and streamline your client interactions. Create workspaces for each case, streamline onboarding and case workflows, store persistent client records, and manage your practice with full visibility into all digital interactions.

Law firms and their clients can find information related to a matter within the Moxo Business Service Platform — delivered under your brand. Completely customize your Hub to reflect your brand personality. Use your visual identity, imagery, colors, and logos to deliver a modern legal service experience to your clients. Configure your hub with customizable workflows, relevant business content, and powerful built-in interactivity. Engage clients with built-in secure messaging, digital signatures, document collaboration, video meetings, screen sharing, virtual data rooms, and more.

The Moxo Platform provides an integrated view into matter status, and allows you to gain visibility into how your practice and staff is performing to your overall business goals. Monitor your firm's progress on an ongoing basis, and identify areas where you can improve. Track and measure performance with searchable, real-time insights make it easy for you to maintain visibility into all cases, while staying on top of all details.

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

For more information, please visit moxo.com

Company Name
Moxo

Find us on LinkedIn

Moxo Review
Click here for the Moxo review on page 29 of the 2022 Practice Management Buyer's Guide

About
Modernize your client interaction workflows with Moxo.

Today's client engagement activities are stuck in the chaos of fragmented silos — requiring significant manual intervention. Moxo provides a Business Service Hub for managing client interactions through modern digital automation. Businesses can streamline deadline-driven client interactions, including account onboarding, account servicing, exception handling.

Moxo powers client interaction workflows across a diverse set of industries including financial services, consulting, legal, accounting, healthcare, and more. Our customers include companies like Citibank, FIS, AMCK Models, Hibernia College, BNP Paribas, and more.

Company History

Our team has a rich history of pioneering in the engagement space: Moxo's co-founder and CEO, Subrah Iyar, was the co-founder and CEO of Webex, and Moxo's co-founder and CTO, Stanley Huang, held senior engineering management positions at Cisco Systems and WebEx. To learn more, visit moxo.com and follow the company on LinkedIn, Twitter and Instagram.
Business law firms are under an enormous amount of pressure to keep track of significant amounts of information, produce high-quality documents quickly, and provide insightful solutions to their client’s problems. With ZenCase, you can keep track of everyone’s responsibilities through our task facility, produce high-quality work-product with the click of a button with our document automation feature called Document Blueprints, keep track of all your clients, matter and firm information in one place, and deliver a uniquely awesome client experience powered by cloud-based technology. We of course provide easy, yet powerful functionality with time capture, including our new Automated Time Manager technology, billing, accounting and firm reporting tool! And through our seamless integration with major document management systems, Microsoft 365 and LawPay, ZenCase is everything a business law firm needs in one easy to use platform.

For more information, please visit zencase.com
Criminal Law

PracticePanther: All-In-One Legal Practice Management Software Designed To Help Lawyers Get More Done in Less Time
PracticePanther: All-In-One Legal Practice Management Software Designed To Help Lawyers Get More Done in Less Time

Case Management Software Designed to Make Your Life Easier

PracticePanther is the leading cloud-based law practice management software trusted by tens of thousands of law firms to automate and manage their practice. The easy-to-use platform ensures you’re focusing on your clients, not your task list.

PracticePanther’s case management features enable users to track and store all case and client information securely in the cloud, and access them from anywhere, at any time. Apply PracticePanther’s one-click workflow templates and watch as tasks and events are automatically created for you, or customize your own to match how your firm operates. Create custom document templates so you can cut down on repetitive tasks, and share them with clients via the customizable client portal. Communicate efficiently through native business texting, and accept documents via eSignature to move cases along. Stay on top of all important deadlines or events by syncing your PracticePanther calendar with Google, Outlook, or other firm calendars and set up reminders via email, text message, or in-app alerts.

Invoicing, Billing and Time Tracking Made Simple

With PracticePanther, users can track billable hours in real time, and create multiple time entries with one click. Enable your law firm to get paid faster with PracticePanther’s built-in payment processor, PantherPayments. Compliantly accept clients’ payments via credit card, eCheck, or ACH with industry-low transaction rates and no monthly fees.

Learn how PracticePanther can automate your firm today: practicepanther.com
Estate Planning

MOXO
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

PracticePanther: All-In-One Legal Practice Management Software Designed To Help Lawyers Get More Done in Less Time
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

Enable a secure, branded business service hub for your legal organization on mobile and web — with built-in client interaction workflows to support your business processes and streamline practice management.

Client interaction workflows for delivering your business service

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The Moxo Platform provides an integrated view into matter status, and allows you to gain visibility into how your practice and staff is performing to your overall business goals. Monitor your firm’s progress on an ongoing basis, and identify areas where you can improve. Track and measure performance with searchable, real-time insights make it easy for you to maintain visibility into all cases, while staying on top of all details.

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

For more information, please visit moxo.com
Case Management Software Designed to Make Your Life Easier

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PracticePanther's case management features enable users to track and store all case and client information securely in the cloud, and access them from anywhere, at any time. Apply PracticePanther's one-click workflow templates and watch as tasks and events are automatically created for you, or customize your own to match how your firm operates. Create custom document templates so you can cut down on repetitive tasks, and share them with clients via the customizable client portal. Communicate efficiently through native business texting, and accept documents via eSignature to move cases along. Stay on top of all important deadlines or events by syncing your PracticePanther calendar with Google, Outlook, or other firm calendars and set up reminders via email, text message, or in-app alerts.

Invoicing, Billing and Time Tracking Made Simple

With PracticePanther, users can track billable hours in real time, and create multiple time entries with one click. Enable your law firm to get paid faster with PracticePanther's built-in payment processor, PantherPayments. Compliantly accept clients' payments via credit card, eCheck, or ACH with industry-low transaction rates and no monthly fees.

Learn how PracticePanther can automate your firm today: [practicepanther.com](http://practicepanther.com)

Company History

Founded in 2012, PracticePanther has grown at unprecedented rates and today serves tens of thousands of customers in over 170 countries. The company’s platform is the most robust, intuitive, all-in-one practice management software for law firms of all sizes and practice areas. PracticePanther’s mission is to make the lives of lawyers and paralegals easier by automating legal workflows and enriching client collaboration. PracticePanther continues to innovative to provide customers the all-in-one feature sets they need to practice law effectively.
Family Law

Neos, the Preeminent Case Management Software for Family Law Firms

The Legal Work Platform: Scaling work. Amplifying Family Law teams.

Streamline your Client Interaction Workflows with the Moxo Business Service Platform

Leading Law Firms Choose MyCase

PracticePanther: All-In-One Legal Practice Management Software Designed To Help Lawyers Get More Done in Less Time

Rocket Matter Makes Managing Family Law Matters Seamless

TimeSolv Serves the Needs of Family Lawyers to Quickly and Accurately Track Time, Invoice, and Get Paid
Neos, the Preeminent Case Management Software for Family Law Firms

Put Families First with Neos Powering Your Firm

As a family lawyer, you’re guiding your clients through some of the most challenging times of their lives. You want to spend your time helping them achieve the best possible outcome, not fruitlessly searching for files, performing repetitive mundane tasks, or switching between applications that disrupt your flow.

Assembly’s cloud-based case management platform, Neos, will boost your productivity and efficiency so you can get more done in less time. It’s a one-stop shop for all your needs, including document and contact management, automated communication, time tracking and invoicing, intake, and more.

Track details like net worth for division of assets, alimony, and more. Securely manage your address book of clients and their relevant cases and take that with you anywhere. Use the LawPay and QuickBooks integrations to accept payments and generate billing invoices without leaving Neos. Mass-generate documents from templates in seconds and automatically file them to multiple cases. Thanks to Neos’ powerful OCR capabilities, searching for files (even in images) is a breeze. Even decrease your intake time and boost accuracy with dynamic forms and automated intake capabilities. Send mass and individual SMS texts and emails automatically by setting up triggers tied to tasks in your workflows.

With Neos as your silent partner, you’ll be able to exceed client expectations and reach new heights of success.

For more information, please visit assemblysoftware.com
Filevine is dedicated to empowering Family Law organizations with tools to simplify and elevate complex, high-stakes legal work.

Filevine is the Legal Work Platform. Why? Because Filevine organizes the chaos of legal work by connecting legal workflows and professionals into one fully integrated legal solution. Working with family law clients requires a different level of custom tools to provide—often time strained and struggling—individuals with connection to their legal team. Legal teams aim to ease the stress of these situations with intuitive and comprehensive intake, management, and billing solutions. Our products have been built to simplify and scale work for legal teams to provide a premiere experience to their clients and ease the stress that comes with needing representation.

Family Law case management tools need to be in-depth and complex as the individuals they serve. Whether presented with a divorce case, child custody case, or elder case, Filevine's solutions bridge the gap with powerful tools like:

- Automated task flows and deadline chains
- Centralized text and email communication
- Fast, secure, and collaborative Document Management
- All-in-one and synchronous timekeeping
- Intuitive and scalable billing
- Simple and informative business analytics

Not only does Filevine offer these tried and tested solutions for legal teams, but they all work together seamlessly. Connecting everything from task automation to client communication and business analytics to legal documents, Filevine empowers Family Law teams to enhance their customer experience while navigating the chaos within their own organization.

For more information, reach out to us [here](#).
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

**Enable a secure, branded business service hub for your legal organization on mobile and web — with built-in client interaction workflows to support your business processes and streamline practice management.**

**Client interaction workflows for delivering your business service**

Moxo helps you streamline your business service processes to deliver modern client experiences. Customize document-heavy workflows to automate routine tasks and streamline your client interactions. Create workspaces for each case, streamline onboarding and case workflows, store persistent client records, and manage your practice with full visibility into all digital interactions.

Law firms and their clients can find information related to a matter within the Moxo Business Service Platform — delivered under your brand. Completely customize your Hub to reflect your brand personality. Use your visual identity, imagery, colors, and logos to deliver a modern legal service experience to your clients. Configure your hub with customizable workflows, relevant business content, and powerful built-in interactivity. Engage clients with built-in secure messaging, digital signatures, document collaboration, video meetings, screen sharing, virtual data rooms, and more.

The Moxo Platform provides an integrated view into matter status, and allows you to gain visibility into how your practice and staff is performing to your overall business goals. Monitor your firm's progress on an ongoing basis, and identify areas where you can improve. Track and measure performance with searchable, real-time insights make it easy for you to maintain visibility into all cases, while staying on top of all details.

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

For more information, please visit moxo.com
Leading Law Firms Choose MyCase

Legal Case Management Software for Unparalleled Productivity

MyCase helps solve the critical administrative challenges of running a law firm while delivering a frictionless client experience. Serving thousands of attorneys across the country, MyCase emphasizes customer trust and feedback, working diligently to make continual product updates that allow law firms to run at peak efficiency.

MyCase’s legal practice management solution is available in three different tiers featuring cloud-based case management, end-to-end billing, client intake, communications, secure document editing and storage with MyCase Drive, and much more.

Built to mirror the workflow of your law firm, MyCase’s user-friendly design is driven by insights and feedback from the people who use the platform every day. Through readily available training, dedicated customer support, and consistent product enhancements, customers are typically up and running in less than two days – the fastest in the industry.

Released in 2022 and available as an add-on, MyCase Accounting is a fully integrated, cloud-based, law firm accounting software that centralizes your firm’s financial data, eliminating redundant data entry across multiple systems.

MyCase’s seamless integration with LawPay makes it easy for your firm to securely accept client payments while ensuring compliance with ABA and IOLTA guidelines.

For more information, please visit mycase.com
PracticePanther: All-In-One Legal Practice Management Software Designed To Help Lawyers Get More Done in Less Time

Case Management Software Designed to Make Your Life Easier

PracticePanther is the leading cloud-based law practice management software trusted by tens of thousands of law firms to automate and manage their practice. The easy-to-use platform ensures you’re focusing on your clients, not your task list.

PracticePanther’s case management features enable users to track and store all case and client information securely in the cloud, and access them from anywhere, at any time. Apply PracticePanther’s one-click workflow templates and watch as tasks and events are automatically created for you, or customize your own to match how your firm operates. Create custom document templates so you can cut down on repetitive tasks, and share them with clients via the customizable client portal. Communicate efficiently through native business texting, and accept documents via eSignature to move cases along. Stay on top of all important deadlines or events by syncing your PracticePanther calendar with Google, Outlook, or other firm calendars and set up reminders via email, text message, or in-app alerts.

Invoicing, Billing and Time Tracking Made Simple

With PracticePanther, users can track billable hours in real time, and create multiple time entries with one click. Enable your law firm to get paid faster with PracticePanther’s built-in payment processor, PantherPayments. Compliantly accept clients’ payments via credit card, eCheck, or ACH with industry-low transaction rates and no monthly fees.

Learn how PracticePanther can automate your firm today: practicepanther.com

Company History

Founded in 2012, PracticePanther has grown at unprecedented rates and today serves tens of thousands of customers in over 170 countries. The company’s platform is the most robust, intuitive, all-in-one practice management software for law firms of all sizes and practice areas. PracticePanther’s mission is to make the lives of lawyers and paralegals easier by automating legal workflows and enriching client collaboration. PracticePanther continues to innovate to provide customers the all-in-one feature sets they need to practice law effectively.
Rocket Matter Makes Managing Family Law Matters Seamless

Since 2007 Rocket Matter Has Been the All-in-One Solution for Family Law Firms

Recognized as the pioneer of cloud-based legal practice management, Rocket Matter provides the necessary tools family lawyers need to grow their business, from intake and marketing to getting paid quickly after successful completion of a matter.

**Legal CRM:** Build automated campaigns to bring in new clients and foster strong relationships to keep current clients coming back.

**Practice Management:** Rocket Matter becomes the heartbeat of your firm, from matter templates to workflow automations, and Kanban-style project management. Share files and request signatures with ease, all without leaving Rocket Matter. Creating tasks, keeping your matter calendar, and diving into business intelligence about your firm are all intuitive and at your fingertips.

**Time & Billing:** Track time anywhere, from any device and seamlessly create and edit your invoices in real time.

**Payments:** Rocket Matter Pay means easily providing a path for your clients to pay you quickly.

**Customer Service:** No other legal practice management provider can boast seven consecutive customer service excellence awards. Rocket Matter will ensure success using our tools. Your success is our success, every day.

Try Rocket Matter for free with unlimited training and support and learn why thousands of family law firms have made the switch.

For more information, please visit rocketmatter.com
TimeSolv Serves the Needs of Family Lawyers to Quickly and Accurately Track Time, Invoice, and Get Paid

**TimeSolv is the #1 solution for family lawyers who demand simple timekeeping, billing, and payments.**

TimeSolv has become the preferred web-based billing, timekeeping, and payments solution for tens of thousands of family law attorneys and is why we’re the **#1 ranked software for usability**, according to G2 Crowd.

After being in business since 1999, we know a successful practice must have the right time, billing, and payment software.

**Time Tracking:** Take the 10-second challenge. TimeSolv’s tools allow you to create time entries with full descriptions in less than 10 seconds on your phone, tablet, or computer.

**Invoicing:** Send hundreds of invoices with just a few clicks. If you need to void or edit a sent invoice, you’re in control with numerous editing features, saving time and money, including industry-leading split billing for complicated family law matters.

**Payment:** With built-in TimeSolvPay, collect and store payment information on your clients and run payment on your time schedule. Run hundreds of payments with one click, ensuring zero AR for every client.

Integrations with Office 365, NetDocuments, and Dropbox means best in class tools married to our software.

Keep accounting up to date with our unique two-way integration with QuickBooks for easy syncing, as well as over 30 different reports.

**Try TimeSolv for free** for 30-days with unlimited one-on-one.

*Company Name*

**TimeSolv**

**Find us on LinkedIn**

**TimeSolv Review**

Click here for the **TimeSolv** review on page 8 of the 2022 Time, Billing & Payments Buyer's Guide

**About**

TimeSolv is ranked as the #1 legal billing software for usability, with simple, intuitive features to increase your firm’s time, efficiency, and productivity.

Online and offline time tracking makes tracking your time easy, and TimeSolv’s mobile app allows you to track your time on the go. Create automatic invoices and share information with clients and employees. Daily to-do lists keep every member of your staff on track. Billing templates allow you to customize your invoices exactly how you want, and TimeSolvPay lets you store credit card and eCheck/ACH information in TimeSolv and run batch payments for hundreds of invoices at once.

**Company History**

Founded in 1999 by Thomson Reuters, CEO Raza Hasan spun off the company in 2006 and with co-owner Greg Berger they built TimeSolv into a modern, web-based time and billing solution that serves thousands of lawyers and other professionals in over 25 countries.
Full-Service Law

ZenCase

Next Generation, Cloud-Based Law Practice
Software That Makes Everyone’s Job Easier
Full-Service Law Firms require practice management technology that serves a broad set of needs, diverse practice areas and today’s remote workforce. They need strong client, matter and information management tools to keep up with growing client demands and information overload. They need strong task management tools to organize and visualize workflows. They need document automation and seamless document management to produce more higher quality, with less effort. They need the easy time capture options, financial tools and reporting capabilities for the firm to prosper. And of course, they need a system that is secure, responsive in or out of the office, integrates with their other tools, like Microsoft 365, LawPay, NetDocuments or other Document Management Systems and can easily scale as their firm grows. ZenCase, the next generation, cloud-based law practice management system is the answer. With best-in-class functionality, one of kind information management tools, workflow automation, tremendous flexibility and ease of use, ZenCase can support the most challenging needs a full-service law firm may face.

For more information, please visit zencase.com
Immigration

Filevine
The Legal Work Platform Immigration Firms Rely on to Scale Their Work and Amplify Their Teams

MOXO
Streamline your Client Interaction Workflows with the Moxo Business Service Platform
As the leading legal work platform built to meet the needs of immigration lawyers and their teams, Filevine makes all the facets of complex legal work seamless, transparent, and effortless for legal professionals and the clients they serve.

Matters of naturalization and citizenship are high-stakes and, for firms specializing in immigration law, the ability to customize workflows for every case type and track every detail and deadline is critical. With customizable workflows for every case type, deadline tracking and alerts, and centralized management and reporting for all your documents and client data, Filevine keeps your team on track so you always know what the next steps are for you and your clients.

As a full legal suite, Filevine offers:
• Automated lead and intake processes that make it easier to track prospective clients and manage their case work in one integrated system
• Robust client communication with texting, email, automated reminders, and eSignature for time-sensitive electronic forms
• Centralized document management that allows you to edit, search, share, and store documents with ease
• Team collaboration with case notes, taskflows, sidebar discussions, and more
• Advanced reporting and dashboards that give you full visibility into every aspect of your business

And with best in class compliance, privacy and security programs, Filevine ensures your and your clients’ data is always protected.

For more information, reach out to us here.
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

Enable a secure, branded business service hub for your legal organization on mobile and web — with built-in client interaction workflows to support your business processes and streamline practice management.

Client interaction workflows for delivering your business service

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Law firms and their clients can find information related to a matter within the Moxo Business Service Platform — delivered under your brand. Completely customize your Hub to reflect your brand personality. Use your visual identity, imagery, colors, and logos to deliver a modern legal service experience to your clients. Configure your hub with customizable workflows, relevant business content, and powerful built-in interactivity. Engage clients with built-in secure messaging, digital signatures, document collaboration, video meetings, screen sharing, virtual data rooms, and more.

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

For more information, please visit moxo.com
Insurance Defense

Neos, the Preeminent Case Management Software for Insurance Defense Law Firms
Neos, the Preeminent Case Management Software for Insurance Defense Law Firms

Supercharge Your Productivity with Neos Powering Your Firm

Insurance defense firms have specialized procedures that are unique to their firm. With Assembly’s cloud-based case management platform, Neos, you’ll be able to customize your workflows to suit your needs, not the other way around. When you have access to features like time and expense tracking, invoicing and billing, document management, online payment, and more in Neos, you’ll wonder how you ever ran your firm without it.

Automated time tracking that prompts timing for each billable task ensures you’ll get paid for every minute of your time and allows you to focus on your clients — not administrative tasks. Use LEDES98B billing files to upload to your clients’ accounts payable system, get paid faster, and automatically generate invoices to save time. Even override existing individual billing rates for specific clients. Neos’ seamless integration with hundreds of applications (including Outlook) means you never have to leave the platform to send meeting invites, check your calendar, send emails and SMS, accept payment, and more. You even have the option to remediate and annotate PDFs, saving your firm thousands in costs for Adobe licensing in most instances. Moreover, Neos’ document management capabilities are second to none. Leverage advanced search, OCR technology, related document filing, case-specific document tagging, and dozens of other features that will keep your firm organized and running like a well-oiled machine.

Isn’t it time you started winning with Neos as your silent partner?

For more information, please visit assemblysoftware.com

Company Name
Assembly Software
Find us on LinkedIn

Assembly Software Review
Click here for the Assembly Software review on page 36 of the 2022 Practice Management Buyer’s Guide

About
Assembly Software blends decades of history and industry experience with next-generation, customer-focused innovation. It brings together two of the legal profession’s pioneering case management brands, Needles and Trialworks, both of which have contributed to Neos, Assembly’s reimagined cloud-based solution. Neos has evolved and will continue to disrupt and transform the legal sector to meet the changing needs of modern law firms.

In 2019, Trialworks and Needles, two leading case management software companies, joined forces to create Assembly. Combining resources and experience allowed for more meaningful investments, robust product development, and improved management strength.

Company History
Pioneering case management platforms Needles and Trialworks were the precursors to Neos. Burt Bank designed the first case management platform, PINS, which evolved into the robust software now known as Needles. Attorney Robb Steinberg created Trialworks. As a lawyer, Robb knew there had to be a better way to search, categorize, and file documents, so he coded and built a database that could store and manage legal documents automatically; this resulted in Trialworks.

Together, Needles and Trialworks have leveraged their legal expertise and technological innovation to create Neos, a cloud-based case management platform that can handle even the most complex firm needs.
Litigation

ZenCase

Next Generation, Cloud-Based Law Practice Software That Makes Everyone’s Job Easier
Litigation law firms are challenged to keep track of what everyone is doing, creating work product to file with the court to keep cases moving and managing large amounts of case information – all of the discovery documents, facts that help or hurt your case, the questions that should be asked in depositions or at trial. ZenCase allows you to leverage all of your prior work and provides information at your fingertips. Our legal practice management platform has all the functions that every member of the firm needs to complete their job better and easier and offers litigators special capabilities with our Knowledge Management (ZenKM) functionality and Task/Task Blueprint features. With ZenKM, litigators can organize and access all of their case information easily to achieve the best outcomes. Tasks allows the firm to organize workflows across the team, see dependencies and nail deadlines. Task Blueprints allows the firm to replicate the workflow, deadlines and task owners from one successful matter to the next, all with a couple clicks. ZenCase of course provides easy, yet powerful functionality with time capture, including our new Automated Time Manager technology, billing, accounting and firm reporting too to make litigation firms more successful!

For more information, please visit [zencase.com](http://zencase.com)
Mass Tort

Neos

Neos, the Preeminent Case Management Software for Mass Tort Firms

Law Ruler

Law Ruler: Specifically Tailored to Serve Mass Torts

MOXO

Streamline your Client Interaction Workflows with the Moxo Business Service Platform
Assembly

Neos

Neos, the Preeminent Case Management Software for Mass Tort Firms

Get the Settlements Your Clients Deserve with Neos as Your Silent Partner

Neos is the only case management platform that scales with your client base and offers superb customization options that accommodate your unique workflows. With mass torts, you never know when your next multi-million-dollar case is around the corner, and they develop fast. You need software that supports all your needs, including mass communication, document management, workflow automation, robust intake, and more.

Assembly's cloud-based case management platform, Neos, delivers all those features and more at your fingertips. Its OCR technology and advanced search capabilities make organization easy, even with millions of files. Customize your case structure, document storage, and workflows so Neos fits your firm like a glove. You'll no longer need a third-party vendor to capture plaintiffs because you can rely on Neos' automated intake abilities. Leverage dynamic intake fields to acquire all the necessary client information without wasting a second. You can mass-generate documents and file them to multiple cases in a few clicks. Enjoy timesaving features like the ability to share case notes, bulk update notes across all cases, and send an email or SMS message to thousands of recipients at the drop of a hat.

The impossible is now within reach with Neos as your silent partner.

For more information, please visit assemblysoftware.com

Company Name
Assembly Software
Find us on LinkedIn

Assembly Software Review
Click here for the Assembly Software review on page 36 of the 2022 Practice Management Buyer's Guide

About
Assembly Software blends decades of history and industry experience with next-generation, customer-focused innovation. It brings together two of the legal profession's pioneering case management brands, Needles and Trialworks, both of which have contributed to Neos, Assembly's reimagined cloud-based solution. Neos has evolved and will continue to disrupt and transform the legal sector to meet the changing needs of modern law firms.

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Together, Needles and Trialworks have leveraged their legal expertise and technological innovation to create Neos, a cloud-based case management platform that can handle even the most complex firm needs.
Simplify and modernize how you grow your practice with Law Ruler's CRM and comprehensive client intake software.

Managing mass tort legal clients is complex and requires organization and efficient record keeping. Law Ruler's CRM provides mass tort attorneys with the necessary tools to automate tasks and provide secure, confidential client communications.

An effective mass tort marketing campaign requires the right legal tools. Mass tort law firms can be extremely busy, so they need systems in place to streamline these processes. Legal client relationship management (CRM) is a viable tool for meeting this goal. It includes features to help firms automate their marketing processes and consistently manage lead communications with minimal effort from firm members. An organized client intake process is also part of law firm CRM, along with value-packed data analytics.

Law Ruler CRM software offers features that mass tort law firms can use to meet their unique marketing needs. For instance, some mass tort law firms use call centers to quickly reach a wide range of potential leads. Many of these centers use Law Ruler as a vehicle for following up and communicating with potential leads. With features like a built-in softphone, text messaging, and automated follow-ups, Law Ruler helps mass tort law firms master their marketing needs.

For more information, please visit lawruler.com

Law Ruler: Specifically Tailored to Serve Mass Torts

Company Name
Law Ruler
Find us on LinkedIn

Law Ruler Review
Click here for the Law Ruler review on page 4 of the 2022 CRM, Business Development, Virtual Receptionist, Chat & Text Messaging Buyer's Guide

About
Law Ruler simplifies and modernizes your law firm with easy-to-use marketing software. Organize current client matters, find new leads, streamline your customer intake, and gauge your firm's health by reporting on your most important KPIs (Key Performance Indicators). Visit lawruler.com to start using marketing software built for lawyers.

Company History
Law Ruler is a functional and propelling enterprise software that transforms how you manage leads, prospects, and clients into simplified, growth-oriented cloud solutions for firms in various practice areas. We meticulously combine technology and expertise to position your firm for growth.

Since 2015 Law Ruler has believed that every firm deserves the best chance for success.

That's why we aim to level the playing field by providing world-class software solutions and expert consulting to law firms who want to grow.
Streamline your Client Interaction Workflows with the Moxo Business Service Platform

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For more information, please visit moxo.com

Company Name
Moxo
Find us on LinkedIn

Moxo Review
Click here for the Moxo review on page 29 of the 2022 Practice Management Buyer's Guide

About
Modernize your client interaction workflows with Moxo.

Today’s client engagement activities are stuck in the chaos of fragmented silos — requiring significant manual intervention. Moxo provides a Business Service Hub for managing client interactions through modern digital automation. Businesses can streamline deadline-driven client interactions, including account onboarding, account servicing, exception handling.

Moxo powers client interaction workflows across a diverse set of industries including financial services, consulting, legal, accounting, healthcare, and more. Our customers include companies like Citibank, FIS, AMCK Models, Hibernia College, BNP Paribas, and more.

Company History
Our team has a rich history of pioneering in the engagement space: Moxo's co-founder and CEO, Subrah Iyar, was the co-founder and CEO of Webex, and Moxo's co-founder and CTO, Stanley Huang, held senior engineering management positions at Cisco Systems and WebEx. To learn more, visit moxo.com and follow the company on LinkedIn, Twitter and Instagram.
Personal Injury

Neos, the Preeminent Case Management Platform for Personal Injury Lawyers

Personal Injury Case Management Software to Build, Manage, and Grow Your Practice

Join Some of the Top Law Firms Using SmartAdvocate to Make Their Practice More Efficient and More Profitable
Neos, the Preeminent Case Management Platform for Personal Injury Lawyers

Unlock the Power of the Original Personal Injury Case Management Software

Assembly's cloud-based case management platform, Neos, is the brainchild of the teams behind the trailblazing case management applications Trialworks and Needles. Built by lawyers, for lawyers, it's the case management software that thousands of personal injury lawyers rely upon to support all their unique workflows.

You may be competing with dozens of other law firms for cases, but with Neos' cutting-edge automated intake that immediately processes, adds, and sends automated follow-ups to clients 24/7, your prospect list will grow without you lifting a finger. Even better, thanks to features like OCR technology, document merging, advanced search, case-specific document tagging, and more, Neos' superlative document management capabilities will boost your firm's productivity right out of the gate. Review data-driven reports that allow you to optimize the ROI on your marketing spend and stay organized with Neos' intuitive folder structures and related document tagging. No need to keep switching between programs for all your needs – Neos' robust integrations include Outlook, DocuSign, Copitrak, Equitrac, Lexitas, Zapier, QuickBooks, and more, all accessible from right inside Neos.

With Neos as your silent partner, you can focus all your attention on getting the settlements for your clients that they deserve.

For more information, please visit assemblysoftware.com
Personal Injury Case Management Software to Build, Manage, and Grow Your Practice

Discover the power of the true Legal Cloud®

Intake Manager
Drive your leads from the starting line to your bottom line with ease. Intake Manager guides you through the intake process so you can attain (and keep) quality leads and grow your firm's profits. Convert your intakes into matters in one click.

Matter Manager
Matter Manager promotes collaboration through case-specific communication and organization tools. Its analytics features allow higher-ups to measure performance correctly and better manage firm resources.

Referral Engine
Referral Engine allows you to grow your national footprint through a collaborative network of plaintiff attorneys. Refer out matters, take on matters, and track your matters securely without ever leaving the app.

Digital Archiver
Eliminate the need for physical storage and house all information related to your closed cases (even digital correspondence) in the cloud. Archived cases are stored on HIPPA-compliant servers and can be accessed (or added to) at any time.

Microsoft 365
Make changes to your Word, PowerPoint, and Excel documents all inside CloudLex. All updates are reflected immediately across all platforms and devices, leading to increased collaboration and less human errors.

See our full list of applications here.

Company Name
CloudLex®
Find us on LinkedIn

About
CloudLex® is the innovator of Legal Cloud®, a revolutionary cloud-based legal platform designed exclusively for plaintiff personal injury law firms. CloudLex enables attorneys to build, manage, and grow their legal practice through its comprehensive suite of innovative applications that can be scaled to their needs. Take control of your practice from intake through closure and beyond with one comprehensive solution backed by Microsoft Azure's HIPAA-certified data security platform. See why thousands of personal injury attorneys across the nation rely on CloudLex for increased productivity, streamlined collaboration, secure client communication, and reporting insights across your firm from case intake to settlement and negotiation, including storage and archival.

Company History
For too long, we witnessed personal injury firms using out-of-date systems or generic case management software that was not customized for personal injury law, so in 2015 we started developing CloudLex with expert tech professionals and trial attorneys, and we officially launched in 2016. Since inception, we have successfully raised three rounds of funding and two rounds of growth capital. We are now one of the leading companies in the personal injury legal tech market with a rapidly expanding client roster and are poised for continued aggressive growth over the next few years.
Join Some of the Top Law Firms Using SmartAdvocate to Make Their Practice More Efficient and More Profitable

See What Makes SmartAdvocate an Award-Winning Legal Case Management Software

Efficiency is a necessary foundation for a law practice to stay competitive. SmartAdvocate makes each facet of a firm fit seamlessly together, and has the tools to make sure that every stage of every case is handled in an appropriate and consistent way. Here’s some examples:

Cloud & Server Based
Either option is fully browser-based, allowing for multiple users to work on a case at the same time.

Dashboards & Reports
Keep track of critical case and lead information, plus vital financial and operational details with dozens of dashboards and reports, or customize your own with our new Dashboard Viewer.

Document Management
Create document templates from over 2,500 available merge codes. Plus, save attachments directly from emails, batch scan using our exclusive barcode feature, share documents externally and even send for eSignature.

Automate Your Firm
Save time and ensure that every state of your cases, from intake to settlement, are handled in an appropriate and consistent way with WorkPlans and Automated Procedures.

Improve Your Intake Process
Our built-in New Case Wizard allows intake staff to capture all of the necessary information from each new prospect. Additional capabilities include the ability to track and assign leads, view intake performance, monitor follow-up and more.

There’s more features to see, including over 125 integration partners, a Client Portal and the SmartAdvocate App. For more information, please visit smartadvocate.com

Company Name
SmartAdvocate
Find us on LinkedIn

SmartAdvocate Review
Click here for the SmartAdvocate review on page 45 of the 2022 Practice Management Buyer's Guide

About
SmartAdvocate is a fully customizable, award-winning legal case management system made to handle the challenges of today's fast paced, highly competitive and technologically demanding world. Initially designed by and for, personal injury and mass tort litigation firms, it is now used by a wide range of practices.

SmartAdvocate's robust, Internet-based features, enable firms to manage, store, track, classify and communicate like never before, ensuring that they achieve the highest level of success. Plus, with 125+ integration partnerships, firms are able to customize SmartAdvocate to achieve exactly what they need. This revolutionary software will increase your practice's efficiency and profitability.

Company History
SmartAdvocate was created by a national plaintiff's personal injury law firm. While searching for software to help resolve many of their specific case management challenges, they realized there were none on the market. More than two decades later, SmartAdvocate has evolved with dozens of major software updates and thousands of new features and enhancements.

Serving law firms in all practice areas, SmartAdvocate has remained dedicated to using client testimonials, reviews, and requests as their main guide in software developments. Among SmartAdvocate's proudest achievements is their 125+ integration partners, including services like eSignature, accounting software, texting, medical records retrieval and more.
Real Estate

CosmoLex Serves Real Estate Lawyers with Unique Legal Accounting — No QuickBooks Needed!

TimeSolv: The Tools You Use to Manage Your Real Estate Law Matters
CosmoLex Serves Real Estate Lawyers with Unique Legal Accounting — No QuickBooks Needed!

With built-in legal accounting using CosmoLex practice management software means no QuickBooks needed.

Most real estate law firms don't have time to do the work necessary to grow your business. That's where CosmoLex comes in with everything you need from attracting and working new clients, to managing your matters, and invoicing and getting paid quickly. And with leading class legal accounting built-in, you don't need QuickBooks.

Legal CRM: CosmoLex CRM ensures every lead and prospect is captured and responded to. Client intake forms ensure smooth transition to your matter work. Messaging is easy with built-in softphone and text messaging tools.

Practice Management: CosmoLex puts individual legal matters at the heart of your law practice management software. That means every email, task, event, form, document, billable item, and transaction-every record-is always tagged to its proper client matter.

Time & Billing: Easy law firm billing options and on-the-go time capturing means time and money won't fall through the cracks.

Accounting: Manage all your law office's bookkeeping and accounting requirements in a single program with built-in compliance checks every step of the way.

Payment: CosmoLexPay provides end-to-end credit card and ACH processing built for lawyers makes it easier for you to get paid!

CosmoLex will become the heart of your law firm practice.

For more information, please visit cosmolex.com
TimeSolv: The Tools You Use to Manage Your Real Estate Law Matters

**TimeSolv is the #1 solution for real estate lawyers who demand simple timekeeping, billing, and payments.**

TimeSolv has become the preferred web-based billing, timekeeping, and payments solution for tens of thousands of real estate attorneys and is why we're the **#1 ranked software for usability**, according to G2 Crowd.

After being in business since 1999, we know a successful practice must have the right time, billing, and payment software.

**Time Tracking:** Take the 10-second challenge. TimeSolv's tools allow you to create time entries with full descriptions in less than 10 seconds on your phone, tablet, or computer.

**Invoicing:** Send hundreds of invoices with just a few clicks. If you need to void or edit a sent invoice, you're in control with numerous editing features, saving time and money.

**Payment:** With built-in TimeSolvPay, collect and store payment information on your clients and run payment on your time schedule. Run hundreds of payments with one click, ensuring zero AR for every client.

Integrations with Office 365, NetDocuments, and Dropbox means best in class tools married to our software.

Keep accounting up to date with our unique two-way integration with QuickBooks for easy syncing, as well as over 30 different reports.

**Try TimeSolv for free** for 30-days with unlimited one-on-one.

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**Company Name**

TimeSolv

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**TimeSolv Review**

Click here for the **TimeSolv** review on page 8 of the 2022 Time, Billing & Payments Buyer's Guide

**About**

TimeSolv is ranked as the #1 legal billing software for usability, with simple, intuitive features to increase your firm's time, efficiency, and productivity.

Online and offline time tracking makes tracking your time easy, and TimeSolv’s mobile app allows you to track your time on the go. Create automatic invoices and share information with clients and employees. Daily to-do lists keep every member of your staff on track. Billing templates allow you to customize your invoices exactly how you want, and TimeSolvPay lets you store credit card and eCheck/ACH information in TimeSolv and run batch payments for hundreds of invoices at once.

**Company History**

Founded in 1999 by Thomson Reuters, CEO Raza Hasan spun off the company in 2006 and with co-owner Greg Berger they built TimeSolv into a modern, web-based time and billing solution that serves thousands of lawyers and other professionals in over 25 countries.
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