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PRACTICE MANAGEMENT

BUYER'S GUIDE

Practice Management Buyer's Guide
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About

The Practice Management Buyer's Guide 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 Practice Management Buyer's Guide

By: Cathy Kenton and Brian Dalton

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

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 Noneventcast podcast series, consistently delivering relevant insights from some of legal tech's leading executives.

As in years past, we launch our annual Buyer's Guide series with the Legal Practice Management volume. Prior editions of this Guide have been downloaded thousands of times and used by legal professionals to help inform their purchase decisions.

Downloading the Buyer's Guide is just the beginning. 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

Keep the Focus on Clients and Deliver a Superior Client Experience While Efficiently Managing Your Firm's Business

PRACTICEPANTHER®

PracticePanther's All-in-One LPM Software Can Handle Any Case Through Easy-to-Use Features

CosmoLex® by profitsolv

CosmoLex Unleashed: Streamlining Legal Practice Management and Client Communication from Intake Through Billing

rocket matter® by profitsolv

Rocket Matter Soars Higher by Automatically Tracking Time Everywhere and Adding Access to ChatGPT

Filevine

Filevine's Future is Supercharged with AI, Transforming How Attorneys Work

Tabs3 by profitsolv

Tabs3 Software Meets All Your Time, Billing, Financial, and Practice Management Needs On-Premises or in the Cloud

lawmatics

The Legal CRM Redefining the Attorney-Client Relationship

ZenCase

ZenCase's Intuitive and Customizable Software Solves Complex Problems and Accomplishes the Most Work with the Least Effort

PHILIPS

Philips SpeechLive Streamlines Document Creation Using Web-Based Dictation and Transcription Workflows

CARET Legal

Keep the Focus on Clients and Deliver a Superior Client Experience While Efficiently Managing Your Firm’s Business

> **“CARET Legal Workflows acts as the firm’s internal playbook for complex tasks, discussions, and decisions with the flexibility to customize for any practice area and each firm’s specific needs. Workflows are triggered by dates, events, and completion of tasks, and are easily created.”**

Company Name Brand
CARET

Product Name Brand(s)
CARET Legal

Latest Developments and Updates

- CARET Legal Workflows improve collaboration and drive efficiency by automating the addition of tasks and calendar appointments for specific matter types and tracking their progress.
- HotDocs integration is available in CARET Legal’s Enterprise Advance pricing tier. Users can experience the power of HotDocs, an advanced legal document automation software, streamlining the process of creating complex and customized legal documents.
- Text Messaging (dashboard) for client texting – attorneys can communicate with clients, leads, and matter-related contacts quickly and efficiently through two-way SMS messaging directly within CARET Legal.
- AI-enabled Quick Summary provides firms with concise document summaries, allowing them to quickly grasp the main points, critical insights, and key takeaways of a document or set of documents.

A Complete Client Solution
CARET Legal offers a complete solution for clients, from prospect to profit, with case management, document solutions, billing, accounting and payments, client communication, and prospect and contact management. Users can minimize data entry and efficiently manage their work by utilizing these powerful tools within the application. Workflows are at the core of CARET Legal, driving consistency across legal teams.

Workflows
CARET Legal Workflows are an automated way to add tasks and calendar appointments for specific matter types and track their progress. Seamlessly embedded into the platform, CARET Legal Workflows

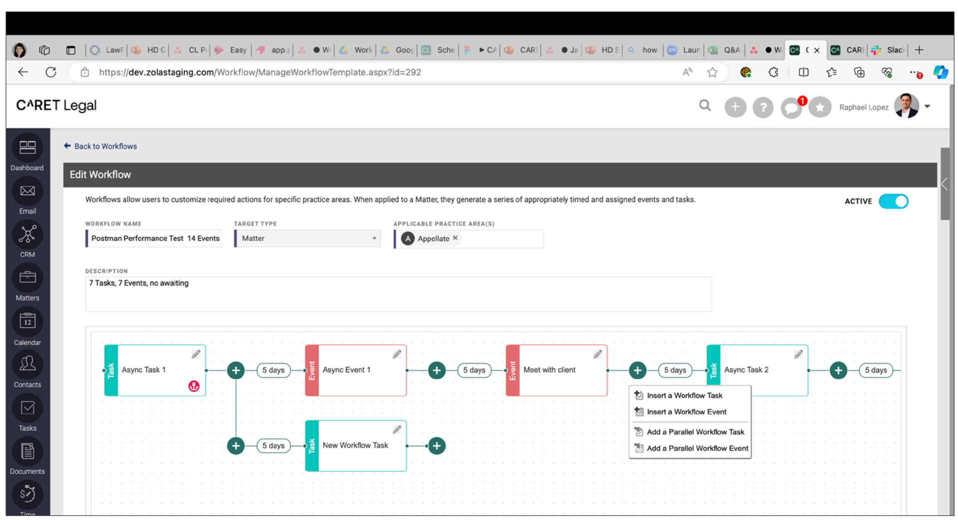


Figure 1: CARET Legal Workflow – Firms can build out their processes from beginning to end. CARET Legal provides intuitive tools to build a process, whether for a task or event, and insert the desired timing between phases.

> Users can automatically generate multiple document types using templates, easily modify files, and track edits for effective collaboration and version control. Once created, documents can be securely stored and easily accessed using intelligent search features."

help legal teams collaborate, align, and coordinate on various protocols to drive efficiency across the firm. This feature acts as the firm's internal playbook for complex tasks, discussions, and decisions with the flexibility to customize for any practice area and each firm's specific needs. Workflows are triggered by dates, events, and completion of tasks, and are easily created. When a firm deploys CARET Legal, it can design workflows aligning with each practice area with tasks assigned by role and initiated by the workflow's anchor date or start date. These workflows will provide transparency into how each step of a case is managed, and the team will have one place to go for information, driving efficiency and uniformity. *See Figure 1 on the previous page*.

Task Management

CARET Legal's Task Management system is a powerful tool enabling legal teams to keep track of their to-do list for each of their cases. The system includes task templates that store the firm's pre-defined procedures in a single location. Tasks can be sorted, filtered, and contain subtasks with users able to create reminders and alerts when tasks are completed or overdue. Team members can tag, comment, color-code, and prioritize tasks and mark them as recurring, and tasks can also be assigned to specific matters and documents as needed. These features make it easy to manage a team's tasks to stay on top of a matter.

Document Management, Automation, and Quick Summary

Harnessing past work for future activity makes good business sense, and CARET Legal has made this practice simple by integrating advanced document automation powered by HotDocs. A document automation software that streamlines the process of creating complex and customized legal documents, such as contracts and wills, HotDocs allows users to transform frequently used documents and forms into intelligent templates, enabling swift production of custom documentation.

HotDocs' templates are interactive and can be customized to fit a firm's specific needs. The software queries the user, via interactive interview forms, for the information necessary to generate a document or set of documents and saves the information in an answer file. *See Figure 2*.

HotDocs document automation software adds powerful benefits to CARET Legal's document management features. Users can automatically generate multiple document types using templates, easily modify files, and track edits for effective collaboration and version control. Once created, documents can be securely stored and easily accessed using intelligent search features.

Another productivity driver in CARET Legal's document solutions is an AI-enabled Quick

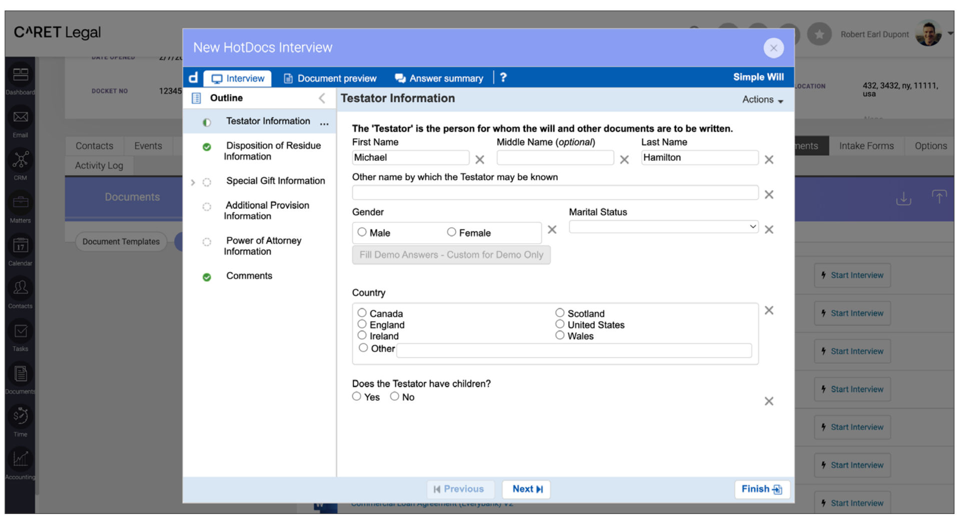


Figure 2: HotDocs interactive interview forms, using conditional logic, are created to gather information needed to generate a document, such as an interview form to create a will. Additional questions are presented based on the answers provided, such as if "married" is selected as the marital status, the form will request the spouse's name. Similarly, if the Testator indicates they have children, names and dates of birth will be requested.

> “CARET Legal provides a client portal for law firms, enabling the legal team and clients to view and share documents securely. The portal features 256-bit bank-level encryption, ensuring privileged information remains protected from unauthorized access. CARET Legal’s in-app, two-way SMS messaging system facilitates client communication without jumping between applications or devices.”

Summary, providing concise yet comprehensive summaries of lengthy documents. Rather than scanning a document, users can glance at it and grasp the main points, critical insights, and key takeaways. The AI-enabled Quick Summary condenses complex information into an easily digestible preview, making it easier to locate a document quickly or provide a memory refresh on a set of documents.

Client Communication

CARET Legal provides a client portal for law firms, enabling the legal team and clients to view and share documents securely. The portal features 256-bit bank-level encryption, ensuring privileged information remains protected from unauthorized access. CARET Legal's in-app, two-way SMS messaging system facilitates client communication without jumping between applications or devices. Whether sending a quick message or setting up an appointment, the system supplies another efficient way for legal teams to manage important communication and deliver a superior client experience. Clients can also pay invoices through the portal, providing a seamless experience.

Accounting and Reports

CARET Legal’s legal billing and accounting software clarifies complex processes with simple, customizable rate cards, time entries, and invoices. The goal of CARET Legal’s accounting software is to improve the productivity of a legal practice. Features like automated compliance checks, matter-centric billing, and legal trust accounting are pre-installed. Additionally, CARET Legal incorporates timers that easily convert into time sheets.

CARET Legal integrated payment processing is an automated and secure way to handle business payments. Offering clients the convenience they need while seamlessly working with the realities of a virtual world, payments through CARET Legal are easy and effortless both for law firms and their clients. Along with faster payments and secure billing and collecting, clients appreciate an easy way to pay while firms appreciate quicker cash flow. Additionally, CARET Legal integrated payments eliminate much of the time historically wasted on unnecessary billing activities, further driving efficiencies.

CARET Legal provides a configurable reporting dashboard, giving firms helpful information quickly, including standard reports that can be altered based on filtering. Client, compensation, productivity, vendor, trust, and accounting are the reporting categories, with many reports provided for each. Reports can be scheduled and emailed on a recurring basis and downloaded to CSV or PDF. Custom reports can also be generated. *See Figure 3*.

Integrations

CARET Legal features bi-directional synchronization and seamless Microsoft

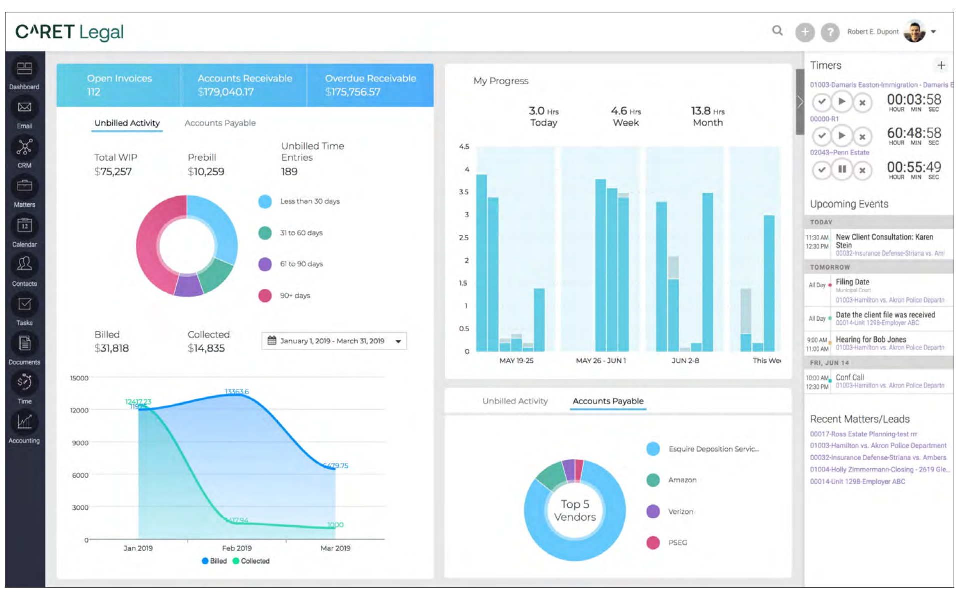


Figure 3: The admin dashboard provides a dynamic and customizable view of the firm’s finances.

and GSuite email and calendar integration. Users can also integrate with QuickBooks, LawToolBox, OneDrive, and NetDocuments. In addition to outside integrations, CARET Legal includes two best-in-class products from the CARET family: advanced document automation powered by HotDocs along with integrated payment processing. CARET Legal guarantees the highest security, privacy, and confidentiality standards with a SOC 2-compliant end-to-end legal practice management platform.

Pricing

CARET Legal provides a competitive tiered pricing model, offering flexibility to meet each firm's needs. Please visit **www.caretlegal.com/pricing** for more details.

Who is CARET?

CARET is a legal technology company with over 300 professionals headquartered in San Diego, California. CARET's mission is to empower legal professionals to focus on what truly matters by providing them with the latest technology and automation tools. CARET offers a cloud-based legal practice management platform called CARET Legal which includes powerful and secure practice management, document automation, and payment processing features. CARET harnesses these components to take firms, professionals, and their clients further. Thousands of legal firms use CARET Legal to streamline their operations and take their business to the next level.

Why Buy CARET Legal?

- Increase organization and align teams and processes with collaboration tools and workflow automation that give quick access to the most essential details of each matter.
- Save time and improve automation with software like document automation powered by HotDocs, allowing firms to create customized documents up to 90% faster than manual creation.
- Drive revenue, expedite the billing cycle through integrated accounting and billing features for accurate invoicing, and provide convenient payment methods with CARET's integrated payment processing system.
- Enhance client communication through integrated client texting, email, and a secure client portal.

See CARET Legal Today!

Find out more about CARET Legal by visiting their website, **www.caretlegal.com**, or **schedule a demonstration** today.

CosmoLex Unleashed: Streamlining Legal Practice Management and Client Communication from Intake Through Billing

“Every email, task, event, form, billable item, and transaction is tagged to its proper client matter to ensure all records are organized and associated with the relevant case. Create customized task workflows and apply them to new or existing matters. Firms can control who performs specific tasks and when they need to be completed, safeguarding efficient deliverability.”

Company Name Brand
ProfitSolv

Product Name Brand(s)
CosmoLex

Latest Developments and Updates

- SMS messaging is available to send invoices; firms can include a payment link, reminders, retainer requests, and general two-way communication.
- Split Billing is a helpful tool for those representing multiple parties that share the responsibility of paying for legal fees by defining what parties are involved, their portion of fees/expenses, and then performing the split at the time of invoicing.
- Ethical Wall is a feature that allows you to shield certain matters from being accessed by specific users.
- The new Balance by Expense Name report provides balance information relating to expenses.
- The User Announcements Panel is a new panel providing an area that displays user announcements.
- Client Intake Forms can now be customized for each firm to meet the needs of all their practice areas.

Comprehensive Practice Management and Client Collaboration
CosmoLex is a cloud-based practice management solution accessible on any device that eliminates IT worries and consistently provides a fully updated platform with modern functionality. CosmoLex combines general practice management with billing and accounting features, providing firms with the means to manage matters efficiently and ease the headaches of administrative work.

Users have intuitive options for managing contacts, email, calendars, tasks, and documents. CosmoLex also provides fully integrated invoicing and payment solutions, thorough trust and firm accounting, as well as business and compliance reporting. A highlight feature that makes CosmoLex an attractive option is the secure client portal, including chat and two-way document

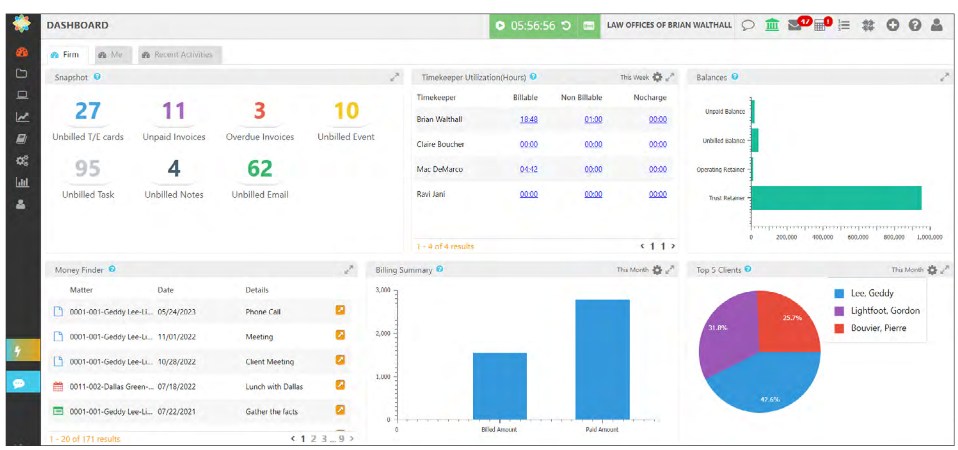


Figure 1: CosmoLex Dashboards provide a central place for users to retrieve information for the firm or a particular matter. Key features include a snapshot of billing information and the Money Finder, which finds unbilled time.

> **“Money Finder helps users keep track of billable items that may have been missed. It automatically scans practice management records for unbilled time on completed events and triggers alerts on a user’s CosmoLex dashboard. With this function, users can mark events, tasks, notes, and more as billable as they are created during a typical day in your office.”**

sharing, allowing firms to collaborate with their clients efficiently.

Matter Management
Users logging into their CosmoLex account see a dashboard with three tabs to decide what data they want to view. The three tabs are named Firm, Me, and Recent Transactions. The Firm tab provides a snapshot of unpaid, unbilled, and overdue items. *See Figure 1 on previous page*.

The Me tab offers information a user needs to manage their work, such as a list of matters, tasks, and time to be billed.

The Recent Transactions tab displays the latest bank transactions and can be filtered by date, bank, type, status, and amount. Access to Recent Transactions can be restricted, allowing only users with permission to access bank account information, in which case, a user would only see the Firm and Me tabs. Users’ personalized dashboard and matter pages display all related meetings, due dates, and deadlines to help them stay on top of critical tasks and ensure nothing gets overlooked.

CosmoLex offers comprehensive legal practice management (LPM) software designed to assist modern law firms. Users can review information from a broad firm overview or an individual matter-centric level. CosmoLex places individual legal matters at the heart of the firm’s law practice management. Every email, task, event, form, billable item, and transaction is tagged to its proper client matter to ensure all records are organized and associated with the relevant case. Create customized task workflows and apply them to new or existing matters. Firms can control who performs specific tasks and when they need to be completed, safeguarding efficient deliverability. This matter-centric approach establishes a solid paper trail, compliance, and the ability to resolve client disputes effectively.

Users can examine information related to a specific matter by selecting it to access the Matter page. View general billing information pertaining to the case and use the navigation panel to find documents, tasks, or calendar activities. This centralized approach eliminates the need for multiple applications to get information and work on a matter. *See Figure 2*.

This all-in-one solution brings calendar management and matter workflows directly in line with case management. Meetings are automatically invoiced to the corresponding matter, and workflows can be customized easily for each case or practice area.

Time, Billing, and Reports
CosmoLex streamlines time tracking, simplifies billing processes, and enhances overall efficiency for law firms. Integrated features deliver seamless management of legal matters while maintaining compliance and accuracy. CosmoLex does not rely on other accounting applications, providing a complete LPM solution for law firms of all sizes and practice areas.

Time can be captured on the go from anywhere on any device using timers. Attach each task to a time entry and matter so billable hours are tracked accurately. CosmoLex encourages easy expense

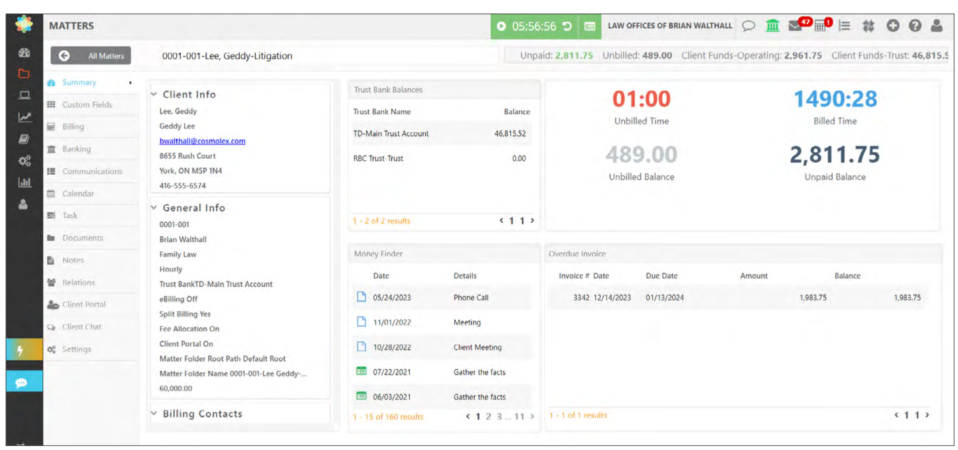


Figure 2: The Matter page provides users access to all information needed to work on a matter and eliminates time-consuming efforts like hunting down a contact’s information or a particular document.

> "CosmoLex NextGen features include user-adjustable views to filter, sort, and change the columns of any data table. Configurable dashboards display the data that matters most to a user, and stored views enable users to access their favorite data visualization method each time they check-in."

tracking of hard and soft costs, streamlining the process and empowering users to post expenses as they occur.

Money Finder helps users keep track of billable items that may have been missed. It automatically scans practice management records for unbilled time on completed events and triggers alerts on a user's CosmoLex dashboard. With this function, users can mark events, tasks, notes, and more as billable as they are created during a typical day in your office. Once that item is completed in CosmoLex, if a time entry has not been created, the CosmoLex Money Finder will remind users daily on their dashboard, providing an opportunity to recover money that may otherwise go uncollected.

CosmoLex includes legal-specific components, including trust accounting, so a firm can generate professional invoices directly from the platform and email them to clients for seamless communication. Additionally, users can easily monitor retainer expenses to ensure accurate accounting. CosmoLexPay allows firms to accept client credit card payments through a secure client portal. You can generate reports effortlessly, either on demand or as recurring reports delivered on a schedule. Reports can be filtered by date, matter, timekeeper, and many more options. *See Figure 3*.

The Future of CosmoLex Lies with NextGen!

The latest iteration of CosmoLex is called NextGen, highlighted by a user-friendly and adjustable design to tailor the application to the specific demands of a firm. NextGen features include user-adjustable views to filter, sort, and change the columns of any data table. Configurable dashboards display the data that matters most to a user, and stored views enable users to access their favorite data visualization method each time they check-in. Custom fields allow a firm to define and report on data attributes, and global search facilitates locating any data in the application quickly. Document templating and assembly and shared views let teams collaborate on the same data using CosmoLex merge fields and Microsoft Word. User security features like two-factor authentication (2FA), password expiration, and password history are required.

NextGen is still in beta, and users are free to leave and rejoin the NextGen experience whenever desired. Any modification to a firm's data in one version will automatically be reflected in the other.

Integrations and Security

CosmoLex offers seamless integration with several third-party apps to provide additional options for email, document storage, calendar, billing, payments, and more. Some popular third-party apps integrating with CosmoLex include Microsoft Excel, Office 365, Google Drive, QuickBooks, LawPay, and Dropbox. Connecting your CosmoLex account to these apps can streamline your workflow and increase efficiency.

CosmoLex is SOC-2 compliant and has designed the security for its platform using

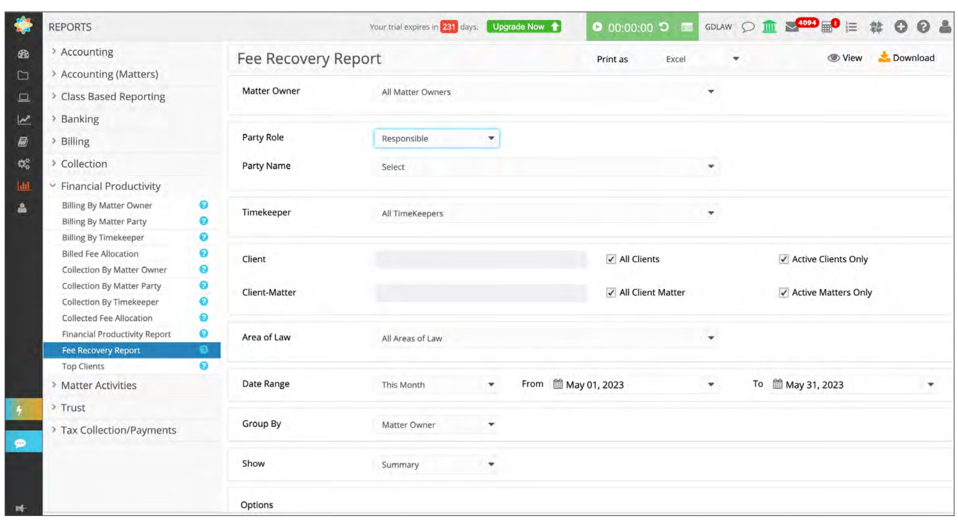


Figure 3: CosmoLex's reporting feature allows users to quickly create reports out of the box and customize them via filters.

bank-grade 256 SSL encryption. Other protocols include account-level security, 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 users 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, as well as unlimited file storage. Client relationship management (CRM) and document-sharing modules are available for an additional monthly fee, and payments will incur a processing fee.

Who is CosmoLex?

CosmoLex is cloud-based legal billing software for law firms offering advanced practice management, billing, and accounting features. It is part of ProfitSolv, a collection of best-in-class software solutions for professional services firms, allowing the freedom for growth and innovation. CosmoLex provides a comprehensive suite of solutions, including practice management, time and billing, payment processing, and CRM software products. CosmoLex is based in New Jersey and is growing with more than 250 clients worldwide.

Why Buy CosmoLex?

- CosmoLex has over 15 years of legal-specific accounting experience, providing firms with the latest technology.
- CosmoLex becomes a business partner, not just another software vendor. CosmoLex continues to work with a firm to ensure they are fully supported for the best and most consistent results.
- With the introduction of NextGen, CosmoLex becomes even more customizable. Law firms can tailor the application to their specific needs, and the user-friendly interface ensures that legal professionals can navigate the software efficiently.
- CosmoLex is the exclusive legal practice management software **endorsed by the Canadian Bar Association**.

How Can CosmoLex Help You?

Schedule a demo today to learn more about CosmoLex!

Filevine

Filevine's Future is Supercharged with AI, Transforming How Attorneys Work

> "Filevine tracks every action in a project in the activity feed. Team members can communicate through comments and records and follow details such as who completed an activity and when. Having all this information in one location facilitates information sharing and makes it simple to stay informed about a case."

Company Name Brand
Filevine

Product Name Brand(s)
Filevine

Latest Developments and Updates

- The first step toward providing Filevine users with an AI virtual assistant tool is SidebarAI. The support tool offers summaries of the most recent developments in a case project and responds to "how-to" queries to assist users in navigating the Filevine platform.
- AIFields helps law firms looking to analyze documents more efficiently, conduct fact-checking more quickly and accurately, and drastically reduce the number of human hours required to comb through pertinent case documents and files. All of this can be done securely, directly from within Filevine.
- Filevine Payments allows firms to accept ACH, credit card, and debit card payments and to track, automate, and customize payment collection.

Improve Collaboration and Focus
The concept that information grows in a case, like how leaves grow on a vine, is the source of the name Filevine. Filevine's leaves centralize documents, tasks, emails, and more, relieving users of the need to remove these leaves from multiple places and apps. Attorneys and paralegals easily collaborate within the firm with Filevine's one platform, which gives them access to all their leaves in one location.

Filevine leverages the power of artificial intelligence (AI) to streamline the legal process from client intake to billing. The platform offers several AI-powered features that automate tasks, free up

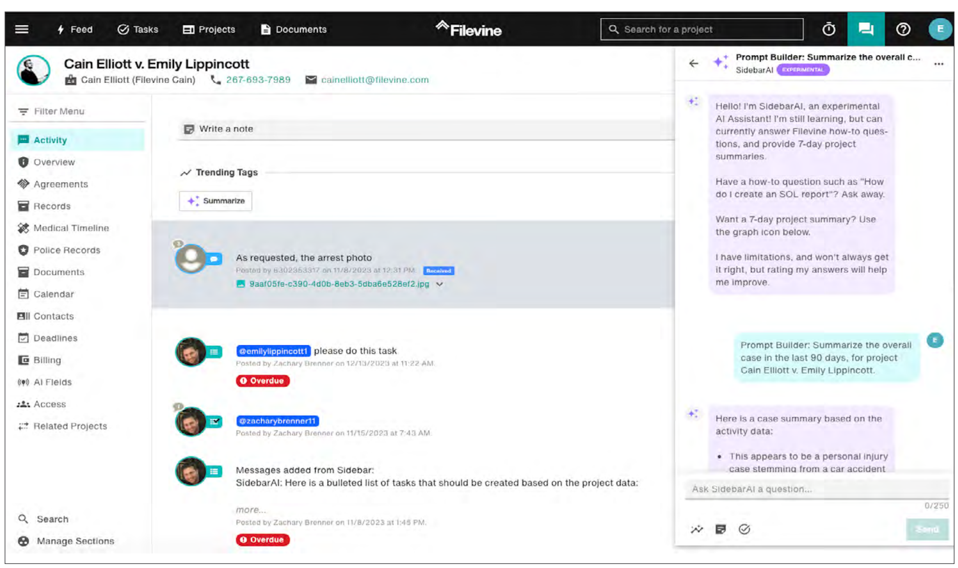


Figure 1: Users will find they spend a lot of time on the Activity Feed, including SidebarAI, which contains key case information. The center panel displays the key communications among team members as well as the client. On the right side of the screen, the powerful SidebarAI is displayed, providing users with assistance for their case.

> **SidebarAI is an AI-powered chatbot designed to facilitate communication and help users navigate the Filevine platform successfully and quickly. It can offer advice, condense situations, and instantly respond to "how-to" queries."**

lawyers to focus on more important activities, and transform how lawyers work.

Lead Docket

Lead Docket is an efficient lead intake management solution with automatic processes to guarantee each lead is promptly followed up, and tasks are clearly defined. It also helps manage and retain leads. LeadsAI, developed by Filevine, allows teams to manage leads from any marketing source in one location easily. It features lead summaries and predictive analysis to streamline and accelerate legal intake and lead management. The AI-powered function creates a well-written synopsis of all data entered in a lead intake form, empowering intake teams to make judgments more quickly and efficiently. Additionally, LeadsAI predictive analysis for MVA (motor vehicle accident) helps determine whether a new lead should be signed, directed out, or rejected, eliminating guesswork in case qualification. An AI-powered fee prediction for possible scenarios provides vital information in determining whether a case would benefit the firm.

Workflows and Activity Feeds

A firm can customize workflows inside Filevine to follow its procedures for every stage of a project or case, ensuring no processes are overlooked. Filevine can use each job to start a workflow's subsequent task. For instance, an engagement letter is generated and made available for the user to edit as soon as the prospective client is accepted. Filevine's automation feature presents the subsequent task in the workflow as each step or task is completed, taking into account the outcomes of the previous action.

Filevine tracks every action in a project in the activity feed. Team members can communicate through comments and records and follow details such as who completed an activity and when. Having all this information in one location facilitates information sharing and makes it simple to stay informed about a case. The communications, tasks, and documents in a case (the leaves) appear in the feed as they are created. Additionally, users have access to SidebarAI for additional information and insight.

SidebarAI

SidebarAI is an AI-powered chatbot designed to facilitate communication and help users navigate the Filevine platform successfully and quickly. It can offer advice, condense situations, and instantly respond to "how-to" queries. SidebarAI can present summaries of every case, topic, or project's activities during the previous seven days. To utilize SidebarAI, click the message symbol in the upper right corner of the screen, then click SidebarAI to initiate a new message conversation. Type your query into the text field and select Send; SidebarAI will look through the Help Center and provide the pertinent details in its response. *See Figure 1 on the previous page*.

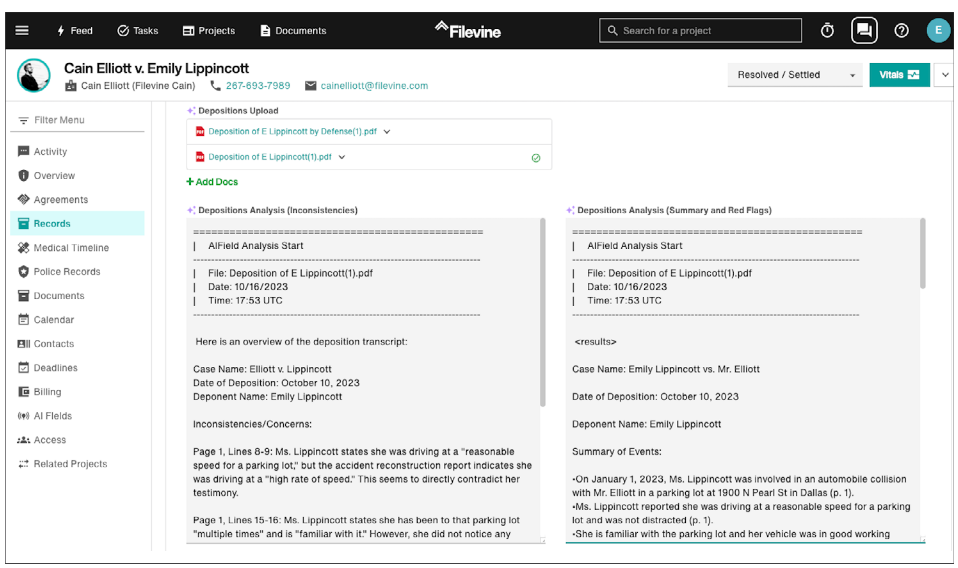


Figure 2: AIFields can show inconsistencies in documents and depositions, highlighting areas needing attention for a case. The example above shows discrepancies between a witness statement and an accident reconstruction. This process takes mere minutes compared to hours of a team member's time culling through documents.

> “Businesses may accept ACH, credit card, and debit card payments to help streamline billing and payment collection, thanks to Filevine Payments. Through a link included in an invoice, clients can pay invoices online. Payments are applied immediately to the client’s account, and invoice statuses are updated instantly.”

In addition to SidebarAI, Filevine has introduced AIFields, which uses the power of artificial intelligence to extract and organize information from documents. It mines various information and can generate summaries from the case file based on a list of analysis types. The extracted information in AIFields can be pulled into reports or referenced in generated documents, just as other fields can. Use AIFields to summarize cases, provide tips, list potential inconsistencies or falsehoods in deposition testimony– including the page of the text and line, and create a chronological list of pain scores from a medical record. *See Figure 2 on the previous page*.

ImmigrationAI

ImmigrationAI is designed to streamline the immigration process by automating tasks, reducing typical errors, and ensuring accuracy. ImmigrationAI scans and obtains key details from client documents, compiles crucial information, assists in completing USCIS forms, and tracks a client’s form completion progress. To use ImmigrationAI, simply upload client documents to the platform, and the tool automatically scans and extracts the necessary information. This feature is especially useful for businesses, individuals, and families who need to be sponsored or immigrate to the United States. *See Figure 3*.

Filevine Payments

Businesses may accept ACH, credit card, and debit card payments to help streamline billing and payment collection, thanks to Filevine Payments. Through a link included in an invoice, clients can pay invoices online. Payments are applied immediately to the client’s account, and invoice statuses are updated instantly. Lead intake, case and issue management, document assembly, e-signatures, contract administration, data analytics, time tracking, billing, and payments are all included in Filevine’s extensive range of natively created products.

Integrations

In addition to tight integration with Microsoft Office, Filevine offers an open API and plays well with other applications, allowing users to customize Filevine as a single location for daily tasks. The most common integrations include Zapier, Slack, and Google (calendar, Gmail). Filevine’s integration with DOMO provides access to reports that will drive efficiency across all matters.

Security

Filevine approaches security methodically and proactively. The team employs audits, penetration testing, privacy and vulnerability assessments, and incorporates security training and certifications, backups, and disaster recovery/business continuity and incident response planning.

Pricing

Timekeeping, billing, and payments are all included in Filevine licenses, along with cloud-based case and task management, scheduled reports, automated workflows, calendaring, team collaboration tools,

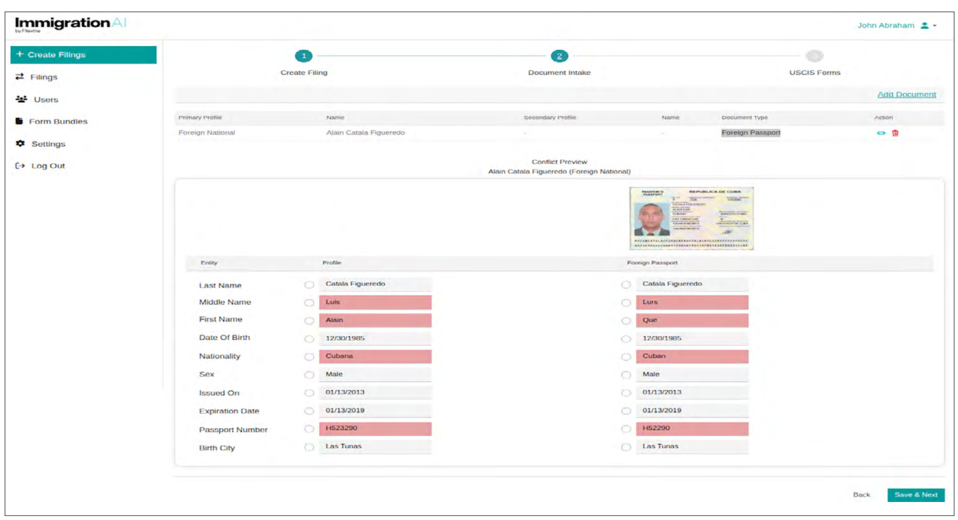


Figure 3: ImmigrationAI has streamlined the onerous process of filling out all necessary documents for immigration legal work, eliminating inconsistencies and errors that tend to prolong the process.

unlimited document storage, contact management, guest access, instant email or text communication, enterprise-level security, and powerful integrations. More modules are offered for an additional cost. For detailed pricing and further details, please contact Filevine.

Who is Filevine?

Filevine is changing the way legal work gets done for law practitioners and their clients. As a leading legal operating system, Filevine is dedicated to empowering organizations with tools to simplify and elevate complex, high-stakes legal work. That is why Filevine now offers a full suite of AI-powered solutions custom-built with the legal user in mind. Powering everything from lead intake and e-signatures to document assembly and case management, timekeeping, billing, payments, and business analytics, over 3,400 law firms and legal teams use Filevine daily to deliver excellence. Filevine is recognized on the Deloitte Technology Fast 500 and Utah Business Fast 50 lists, is a Top Workplace USA winner, and is among the fastest-growing companies on the 2023 Inc. 5000 list.

Why Buy Filevine?

- Payments by Filevine enables a firm to accept ACH, credit card, and debit card payments, and clients can quickly pay invoices via a link, which is applied directly to the proper account and updates payment status automatically.
- Combining automated workflows with collaborative document creation makes Filevine a powerful tool for law departments and firms to get more done in a fraction of the time.
- Improve turnaround time for converting leads to clients.
- Make data-driven decisions on individual cases as well as a management strategy.

See Filevine Today!

Find out more about Filevine by **scheduling your demo today!** And learn how Filevine can impact your business through our many **podcasts, blogs, white papers, and more.**

lawmatics

The Legal CRM Redefining the Attorney-Client Relationship

Running the administrative side of a law firm should never get in the way of practicing law. Lawmatics is the leading legal CRM because it simplifies the client journey and makes law firms more efficient. Our customizable automation platform delivers a prompt, personalized client experience at every stage — from marketing and intake through referrals and repeat business.

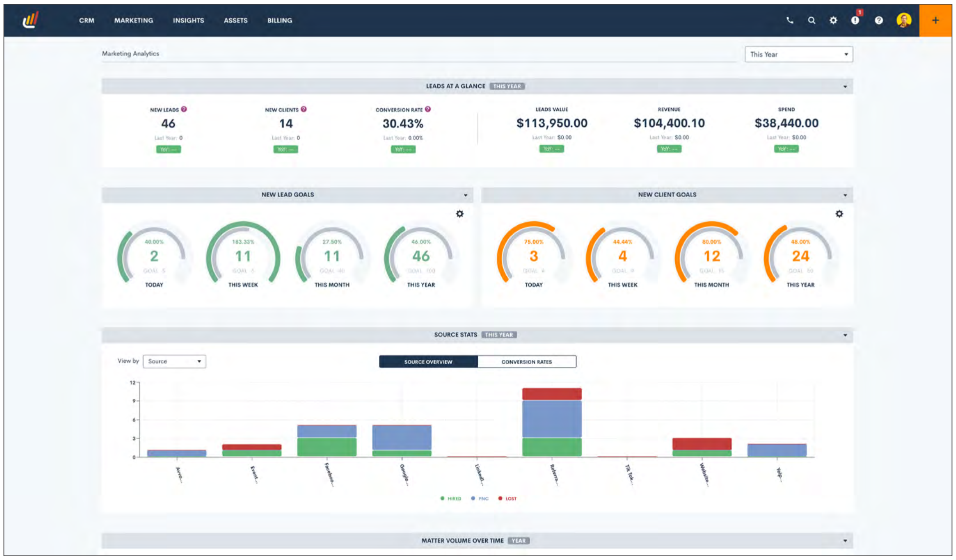
As an all-in-one hub for scheduling, communication, marketing analytics, and more, Lawmatics is the engine to your law firm's growth.

- Our pipeline workflow system eliminates inefficiencies in the follow-up process by means of automations, email and SMS templates, custom forms, calendar integrations, and customizable tags.
- Capture all the client data you need and scale your business without losing the personal touch by using unlimited custom fields in your forms, documents, and emails.
- Set clear marketing goals for any time period, use data-learning AI to measure and track progress, and gain valuable data and insight into lead behavior.
- Win new clients with prompt follow-up and automated drip campaigns to make a strong first impression and keep your law firm top of mind
- Consolidate your firm's critical business metrics into easy-to-use Custom Dashboards, tracking data regarding intake, marketing, and financial health

No matter the practice area or size of firm, Lawmatics enables law firms to streamline their operations, impress clients, and win more business.

According to our customers, since adopting Lawmatics:
- 95% of users increased revenue
- 87% increased efficiency
- 77% decreased the number of lost prospects

For more information, please visit **www.lawmatics.com**



Company Name
Lawmatics
Find us on **Linkedin**

About
Lawmatics is a legal-specific CRM engineering a new era of the legal client experience, offering marketing automation, legal client intake, performance analytics, and much more – all in one easy-to-use software. With Lawmatics, law firms streamline their operations, impress clients, and win more business. Founded in 2017, Lawmatics is headquartered in San Diego.

Company History
Lawmatics was founded in 2017 by attorney Matt Spiegel and software engineer Roey Chasman. Lawmatics was recognized as Product of the Year for 2023 by Business Intelligence Group at the Sales and Marketing Technology Awards. Lawmatics' AI-powered email assistant – LM[AI] – was given the LegalTech Breakthrough Award for LegalTech AI Innovation of the Year. The Customer Success Team at Lawmatics was awarded a Bronze Stevie Award for customer service by Business Intelligence Group. Lawmatics has also been named an Inc. Power Partner the last two consecutive years.

PHILIPS

Philips SpeechLive Streamlines Document Creation Using Web-Based Dictation and Transcription Workflows

"Unlike most speech-to-text engines that are speaker-dependent, SpeechLive also offers multi-speaker speech recognition. When you select the speech-to-text function for dictation, SpeechLive prompts you for the language and the number of speakers. The function uses artificial intelligence (AI) to identify multiple speakers and attribute speech to each, e.g., speaker 1, speaker 2, speaker 3, etc."

Company Name Brand
Speech Processing Solutions (dba Philips Dictation)

Product Name Brand(s)
Philips SpeechLive

Latest Developments and Updates

- Speaker-independent speech recognition identifies, disambiguates, and transcribes multiple-speaker recordings.
- Dragon Naturally Speaking Legal and Professional integrations are forthcoming.
- SpeechLive will soon integrate with iManage and NetDocuments document management systems.
- Continuous numbering of new dictations reduces file name duplicates.

Save Time by Speaking Instead of Typing
Philips SpeechLive is a web-based dictation and transcription workflow solution that empowers you to turn your voice into text anytime using a web-based application, computer microphone, mobile voice recorder, or smartphone. No software installation is required. Speaking instead of typing streamlines document creation and reduces the tedious communication necessary to delegate tasks using an automated and secure document workflow.

Speech-to-Text on the Web
Edit and store dictations created natively in the Philips SpeechLive web app or mobile app on an Apple iPhone or Android smartphone. You can set the language to English, German, or French for the SpeechLive user interface.

The web app provides a central view of all dictations available for transcription and readily displays the status for authors to see if a due date has passed (in red). Recordings can be created using the computer's microphone, a dedicated

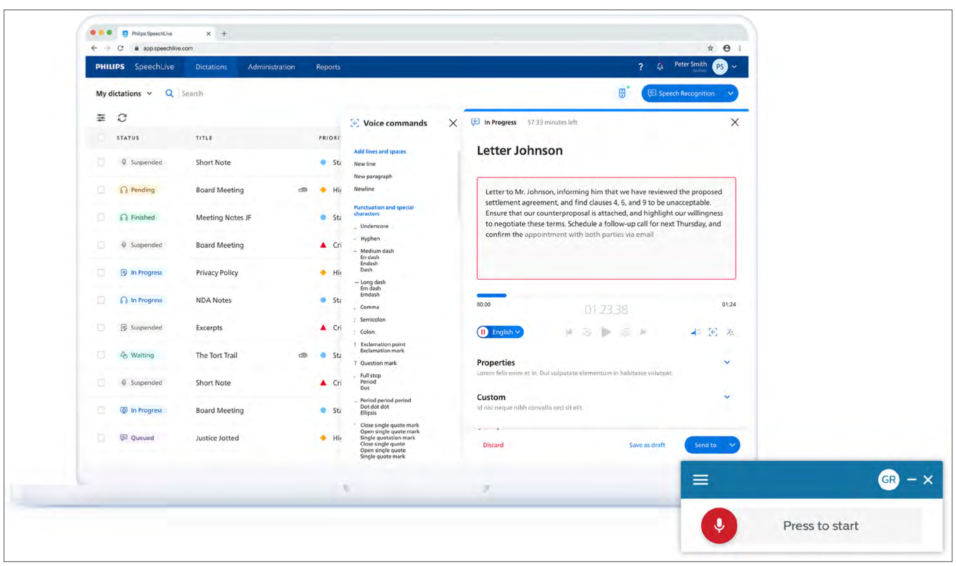


Figure 1: Philips SpeechLive web app lists dictations by status and presents a window to transcribe speech-to-text or create a recording to send to a typist, a backend speech-to-text function, or a transcription service. The desktop app dictation bar lets you dictate into any application.

> **Typists can transcribe dictations and correct speech-recognized text in their favorite desktop text editor, such as Microsoft Word, and drag and drop the completed transcript onto the audio record, adding images or video attachments (.webp, .tiff, .jpeg, .jpg, .png, .bmp, .gif, .heif, .heic, .mp4) where necessary."**

dictation microphone like the Philips SpeechMike or Philips SpeechOne Dictation Headset, a voice recorder like the Philips Digital Pocket Memo or any other recorder, as well as the Philips SpeechLive smartphone app. Connect a foot control to play, pause, or rewind dictations directly in the browser for easy transcription. Professional dictation tools allow you to edit dictations as well as append, insert, or overwrite speech in a recording. When complete, send the dictation to a typist, a backend speech recognition engine, or a transcription service, which is always an option for English, French, and German speakers.

With speech recognition, the web app can transcribe dictation in real time. The desktop app allows you to place your cursor in any program and live dictate into a document, email, or any other application. The web and desktop apps support speech recognition in over 20 languages, including English (AU, GB, US), French, German, Italian, Polish, and Spanish. *See Figure 1 on the previous page*.

Unlike most speech-to-text engines that are speaker-dependent, SpeechLive also offers multi-speaker speech recognition. When you select the speech-to-text function for dictation, SpeechLive prompts you for the language and the number of speakers. The function uses artificial intelligence (AI) to identify multiple speakers and attribute speech to each, e.g., speaker 1, speaker 2, speaker 3, etc.

SpeechLive automatically routes dictations to typists and notifies them of assignments via email. Typists can transcribe dictations and correct speech-recognized text in their favorite desktop text editor, such as Microsoft Word, and drag and drop the completed transcript onto the audio record, adding images or video attachments (.webp, .tiff, .jpeg, .jpg, .png, .bmp, .gif, .heif, .heic, .mp4) where necessary. The web app notifies the author via email when a transcript is finished.

You can assign any user the office manager role with advanced access controls. Office managers can view all authors' dictations of the account, define workflow relationships or teams, and set workflow relationships between authors and typists. *See Figure 2*.

Philips SpeechLive Desktop App and Mobile App

With the desktop app, authors use front-end speech recognition to directly insert text into any desktop application, such as Microsoft Outlook, Word, OneNote, and case management systems. A floating speech recognition bar remains at the top of the screen. The app is compatible with all microphones and supports automatic software updates. Authors can also use portable voice recorders, save dictations on the desktop, and upload them to the web app using the desktop app. Assistants or typists can then use backend speech recognition to transcribe and proofread documents.

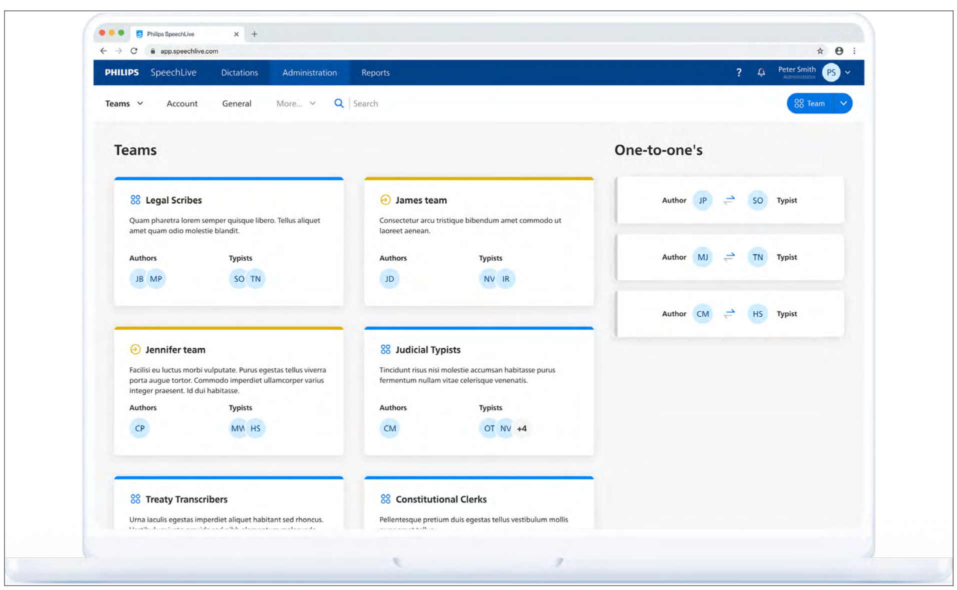


Figure 2: The office manager role sets up teams and pairs authors and typists to automatically route dictations for transcription and further processing.

> “Like the web app, the SpeechLive mobile app has professional editing functions, dictation and transcription workflows, and the ability to attach images or video files. The mobile app supports PIN, biometric, and multifactor authentication (MFA).”

Dictations and speech recognition records created in the mobile app on iPhones and Android phones synchronize records to the web app. Like the web app, the SpeechLive mobile app has professional editing functions, dictation and transcription workflows, and the ability to attach images or video files. The mobile app supports PIN, biometric, and multifactor authentication (MFA).

Finished dictation jobs can remain in the web app's active work list for 0-60 days. If you archive a finished dictation, SpeechLive can maintain it for up to 365 days. To preserve it longer, download a job, including the transcript, any attachments, and the audio record in wave format, and store it according to your data management policy.

You can customize the web app to display metadata for dictations in your preferred order from left to right and filter dictations by pending, suspended, or finished status. Search dictations using metadata, which includes title, attachment, comment, and custom fields, and view standard reports. *See Figure 3*.

The status report provides a high-level overview of jobs added by authors and completed by typists. The pickup report shows how long dictations remain in "dictation pending" status. The process time report calculates the time it takes for a job to go from transcription pending to finished and includes a transcription productivity analysis. You can filter all reports by date ranges and download the data to use your report writer.

Administering SpeechLive

The web app operates in the Microsoft Azure cloud and adopts Azure security with support for MFA and single sign-on (SSO) with Azure Active Directory. The Philips SpeechLive web app is always up to date, works in virtual environments, such as Citrix and other remote desktops, and supports automatic and georedundant data backups. The app supports GDPR conformity with Azure hosting in the US, Canada, the EU, and Australia.

The desktop and mobile apps are updated automatically. Philips Remote Device Management software allows administrators to configure and centrally manage mobile apps in law firms. Regional partners provide direct technical support, and the Philips SpeechLive website provides access to manuals, FAQs, and video tutorials. The site also sports a SpeechLive workflow status that is green when all services are up and running.

Integrations and Technology Partners

Philips application programming interface (API) integrates SpeechLive into case management systems. API functions include editing dictations and properties, managing users and teams, retrieving and updating user settings, and supporting attachments, such as transcripts, images,

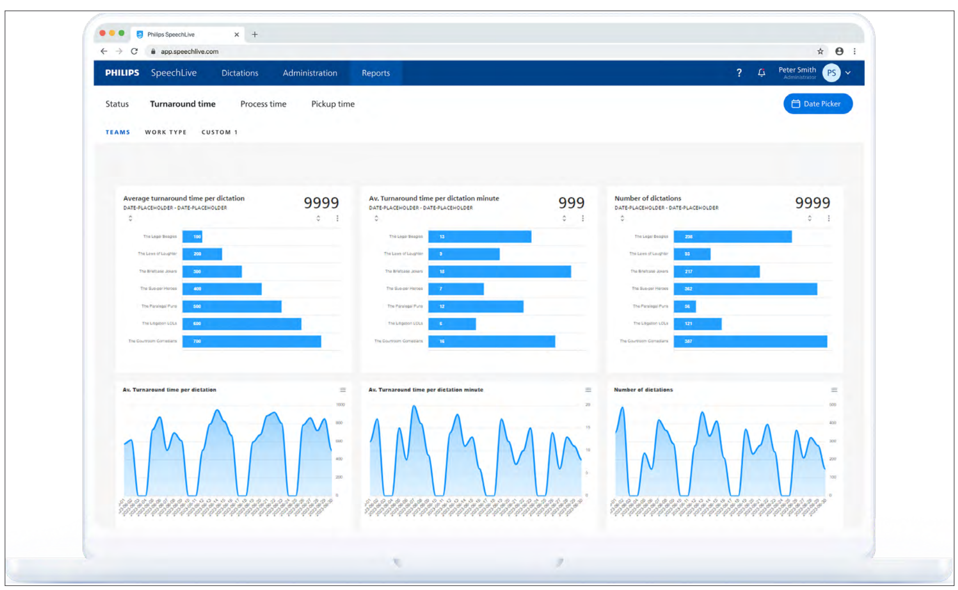


Figure 3: The turnaround time report shows the total time from when the author submitted the dictation to a transcriptionist completing it.

and videos, making it easy to automate workflows.

Integrations with NetDocuments and iManage document management systems are imminent. Speech Processing Solutions supports Dragon Legal Anywhere, Dragon Professional Anywhere, and Dragon Law Enforcement (North America only) within SpeechLive, in addition to speaker-independent speech recognition.

Pricing

Philips SpeechLive uses **subscription-based pricing in feature-bundled plans.** The Basic plan for individuals and small teams costs $12.90 per user per month. The Pro plan offers voice productivity for teams of up to 25 users for $16.90 per user per month. The Enterprise plan for large teams starts at $20.90 per monthly user. For enhanced productivity, add speech recognition per user to Pro plans and up.

Who is Philips Dictation?

Speech Processing Solutions (SPS), a Philips brand licensee, is a global leader in professional dictation solutions with 65 years of experience developing speech-to-text products. SPS is active in over 50 countries, with over 4 million users and a worldwide network of more than 1,000 partners. It develops and markets dictation and transcription solutions, automated documentation workflows with speech recognition, and award-winning dictation devices—all sold under the Philips brand. SPS' mission is to empower users to be more productive by simplifying their work with intelligent, voice-based solutions. Headquartered in Vienna, Austria, SPS has regional offices in Australia, Canada, Belgium, France, Germany, the United Kingdom, and the United States.

Why Buy Philips SpeechLive?

- Dictate and transcribe recordings from anywhere using web, desktop, and mobile apps.
- Web, desktop, and mobile apps can use front-end and back-end speech recognition.
- Automatically routes dictations to assistants and typists.
- Attach transcripts, pictures, and videos to dictations.

Try a SpeechLive Free Trial Today!

Create an account and sign in for a fully functional 14-day trial with no obligations or credit card required to add up to 10 users and get 200 minutes of free speech recognition per user.

PRACTICEPANTHER®

PracticePanther's All-in-One LPM Software Can Handle Any Case Through Easy-to-Use Features

> "PracticePanther includes built-in workflows, document templates, time tracking, billing, electronic signature, and a native payment processor, PantherPayments, to get paid online and on time."

Company Name Brand
Paradigm

Product Name Brand(s)
PracticePanther

Latest Developments and Updates

- Assign clients a custom invoice template and designate one or more clients to receive invoices.
- Use a dedicated calendar to monitor and track clients' statutes of limitations.
- Save, reuse, and share custom reports using the new Modern Matters Grid.

PracticePanther Springs Into Action
PracticePanther is an all-in-one legal practice management (LPM) software-as-a-service (SaaS) that law firms can customize and design to fit one or more practice areas. No third-party software is required as PracticePanther includes built-in workflows, document templates, time tracking, billing, electronic signature, and a native payment processor, PantherPayments, to get paid online and on time. The software is easy to use and navigate; you can access all features from one web browser tab. PracticePanther receives four to ten monthly updates of new features and enhancements.

Dashboard
When you first log in to PracticePanther, your homepage dashboard brings you up to speed on law firm metrics, including trust funds, outstanding invoices paid, invoices due, and billable amounts not invoiced. You can apply a date range to filter the metrics. *See Figure 1*.

Beneath the metrics, PracticePanther provides quick access to create the most used new objects, including a contact, matter, task, note, send a message, track time, add an expense, new matter intake, new invoice, new payment, and new flat

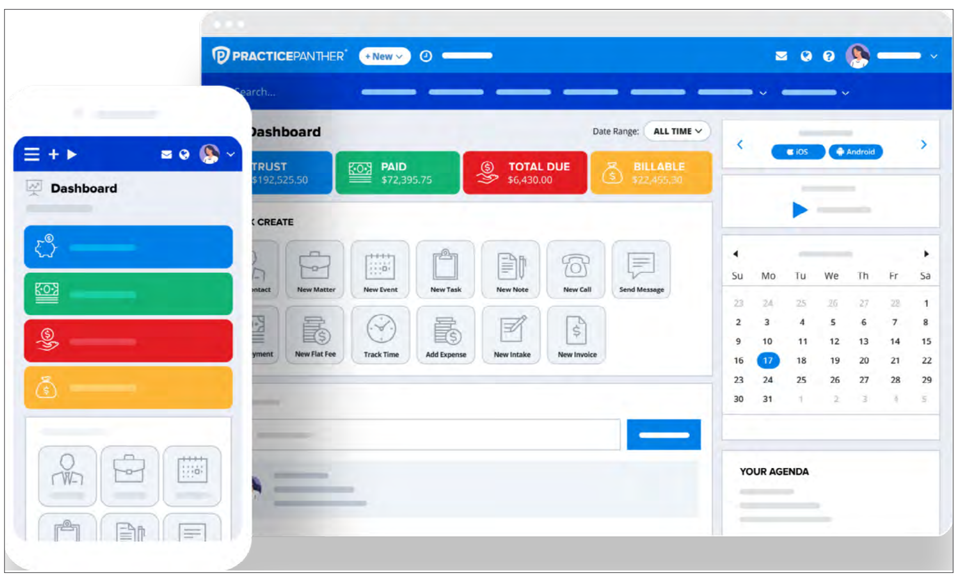


Figure 1: PracticePanther's home dashboard on the web and in the mobile app displays the law firm's financial details for trusts, paid invoices, due invoices, and billable records alongside a view of your calendar, agenda, and billable timer.

"You can create branded, custom intake forms by practice area and send them to potential clients or make them available via the law firm's website. The client intake software automatically synchronizes intake form data as contact information, saving staff time on manual data entry and reducing errors."

fee. Using the white New button in the upper left-hand corner of the browser, you can access all the actions available in PracticePanther, including scheduling, communications, and accounting functions to create invoices, workflows, document templates, eSignatures, intake forms, and more.

Intake

You can create branded, custom intake forms by practice area and send them to potential clients or make them available via the law firm's website. The client intake software automatically synchronizes intake form data as contact information, saving staff time on manual data entry and reducing errors. Use custom fields and tags to capture the necessary information to determine if the case suits your practice.

The software sends notifications when a lead completes an intake form. When you access the new contact, PracticePanther automatically runs a conflict check to review potential conflicts with the same name, email, or phone number. If there are no conflicts, save the contact to a client profile where you have all the resources to manage the client in a web browser view, displaying tabs for activities, notes, messages, invoices, payments, time, expenses, files, and matters.

Matter Management

When you create new client matters, assign the client to a practice area configured with custom fields to only view and work with information specific to that practice area. For example, a personal injury case may have fields for medical liens, settlements, incident dates, and doctors for a case. Other cases, like bankruptcy, will have fields specific to that case type, such as secured and unsecured debtors. PracticePanther lets you group fields in a custom order and apply them to matters, allowing you to view the most pertinent information at the top.

You can assign an invoice template at the outset of a matter and determine who receives invoices. PracticePanther supports split billing and sending invoices to multiple recipients. Set the matter rate as hourly, flat pricing, or contingency, and set or create a matter rate for everyone or detail the rate by attorney and paralegal. If a statute of limitations applies to a matter, PracticePanther lets you enter the date, and you can view and track the matter in the statute of limitations calendar.

You can create and apply an unlimited number of tags to matters. The tags become filters in custom reports and searches. You can filter all matters by status, such as open, pending, closed, billable, and archived.

Automated Workflows

Using a graphical user interface, you can create, clone, and reuse automated or conditional workflows. Build workflows using events and the tasks that must occur

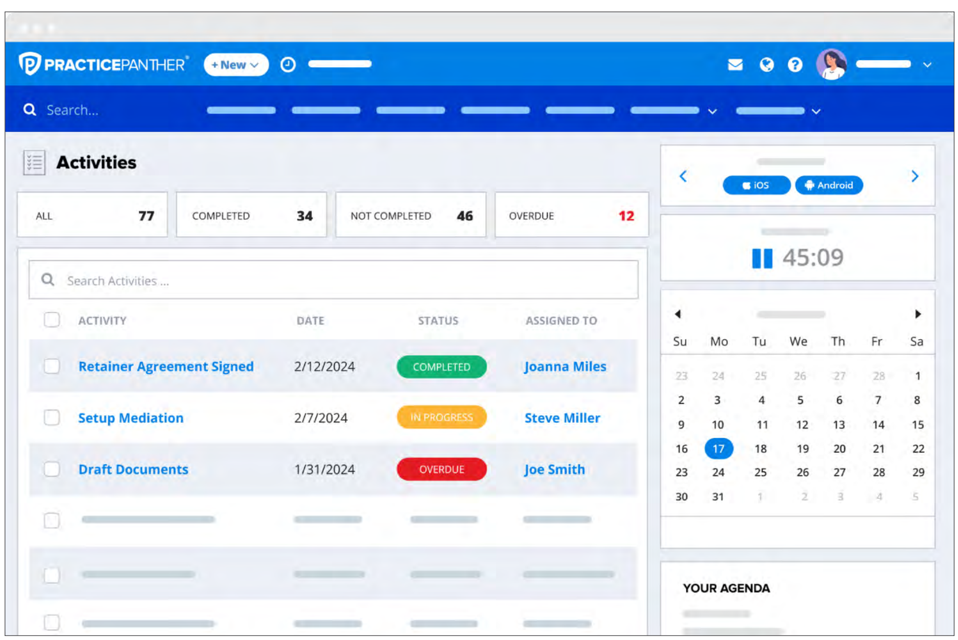


Figure 2: The PracticePanther Activities page provides an overview of matter activities while keeping your calendar, agenda, and billable timer in view.

> "Each invoice template features a built-in Pay Now button powered by PantherPayments. When clients opt to pay now, they can enter credit card information and Automated Check Handling (ACH) data or access their bank account and send a payment from there."

upon each event. You can also design workflows with branches if and when matters change course in a predictable and repeatable manner.

Create tasks with due dates, reminders, priorities, tags, and assignments for other users and clients with email notifications. Workflow tasks will only appear on your to-do list once the preceding task is complete, triggering the next task. Apply workflows in the Activities tab of the client profile. *See Figure 2 on the previous page*.

PracticePanther asks you for the start or trigger date when you start a workflow. Then, the rest of the workflow proceeds from the completion of one task to the next. The software can filter views of incomplete and completed tasks so you know what needs immediate attention and what was done, providing an audit trail of activities.

From the Activities page, you can create or use a template. PracticePanther will populate the template with client data and other contacts, such as a court and opposing counsel. Managing matters includes **SMS two-way business messaging** with clients and contacts for you to send them texts with attached documents, emojis, and One-Link payment requests. PracticePanther provides support for **electronic signatures**—no need for third-party software.

Running custom reports to manage matters in PracticePanther is as easy as applying tags to filter the view for clients, practice areas, time periods, or other criteria. Besides filtered views, the Money-Finder feature reports on unbilled time spent on client matters, and if you switch to the software's Modern Grid View, you can save and rerun reports on demand.

Time, Batch Billing, and PantherPayments (Pay Now)

PracticePanther supports three methods to enter time:

- Start and stop timers.
- Manually create individual time entries.
- Manually create multiple time entries for many timekeepers.

You can only use one timer at a time. If you start a new timer, an existing timer will pause until you restart it.

You can generate invoices in PracticePanther monthly or as needed for one or more clients and matters. When you start a new invoice, the software prompts you to create one or multiple invoices or set up a payment plan. When you generate numerous invoices, custom control the operation using filters to batch bills by matters originated or assigned to specific individuals, practice areas, custom tags, and more. Then, set a custom invoice template if one was not preassigned when you created the matter. *See Figure 3*.

Once you generate the bills, PracticePanther lists all the invoices that match your criteria.

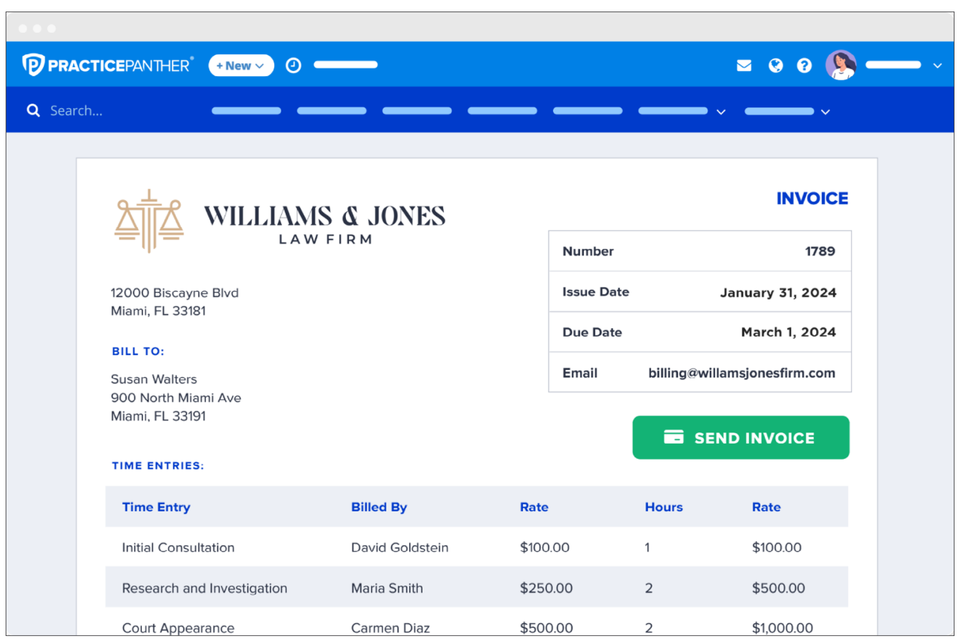


Figure 3: PracticePanther makes it easy to build and send custom-branded invoices.

There is a pre-bill approval process to send invoices for approval before distribution. PracticePanther can also notify individuals when the firm receives payments. Each invoice template features a built-in Pay Now button powered by **PantherPayments**. When clients opt to pay now, they can enter credit card information and Automated Check Handling (ACH) data or access their bank account and send a payment from there. PantherPayments charges an industry-low fee of 2.9% for all credit cards and 1% for eCheck. Clients can also store payment information with PantherPayments, a PCI (Payment Card Industry)-compliant payment processor.

PracticePanther automatically logs all trust account transactions. You can apply funds to invoices, disburse, and transfer trust funds to operating accounts without manual entries. You can also set up notifications for low retainer balances and prohibit balances from dropping below zero. If a payment would result in a negative trust balance, an error displays that a user must correct.

You can 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.

PantherPayments reports on transaction fees and eCheck deposits in the software. There is no logging onto a third-party provider's website to view income and fees. All other reports for invoices, contacts, matters, expenses, time entries, and flat fees are also available with PantherPayments from the same reports page running in the same web browser tab as all other PracticePanther functions. That makes navigation easy and getting lost difficult anywhere in the software.

Integrations
PracticePanther integrates with many law firm applications, including QuickBooks, Lawmatics, LawToolBox, Google apps, Microsoft Exchange, and Outlook. View contacts and synchronize email, calendar, and tasks with Outlook. Use a bidirectional synchronization with Google Calendar for events and tasks and the native Gmail add-on to log emails from Gmail into PracticePanther. Document storage integrations include Microsoft OneDrive, Box, DropBox, and Google Drive.

Pricing
PracticePanther offers three flexible, feature-based **pricing plans**, starting with Solo at $49 per user per month. Add custom fields, security roles, and more with the Essential plan for $69 per user per month, and get all the features discussed in this review, including LEDES billing and free data migration, with the Business plan for $89 per user per month.

Who is PracticePanther?
PracticePanther is an all-in-one LPM software-as-a-service with a mission to make the lives of legal practitioners easier. Founded in 2012, the company has grown exponentially to serve 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 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?
- Easy to use, customizable, and updated four to ten times per month.
- All-in-one LPM software; no third-party software required.
- Transparent pricing and free migration support.
- Built-in PCI-compliant payment processor and trust accounting.

See PracticePanther Today!
See law practice management software made easy by PracticePanther – **get a free demo today!**

rocket matter®
by profitsolv

Rocket Matter Soars Higher by Automatically Tracking Time Everywhere and Adding Access to ChatGPT

> "Rocket Matter Track automatic timekeeping logs your time in all your office applications, including email and web browsing. Download Track to your local computer or device, log in to Rocket Matter with your credentials, allow the app to record the computer screen, and create timers for client matters that automatically sync back to your online account."

Company Name Brand
ProfitSolv

Product Name Brand(s)
Rocket Matter

Latest Developments and Updates

- The web-based dashboard displays a calendar view of timesheets.
- Rocket Matter Track automatically tracks time.
- Flag and list vendors separately in contact management.
- Improved and refined the granularity of QuickBooks Online integration.
- Access to ChatGPT to jump-start document generation.

Rocket Matter in Flight
Rocket Matter is a law practice management (LPM) Software-as-a-Service (SaaS) provider, part of ProfitSolv's software suite for professional service organizations. Since ProfitSolv acquired Rocket Matter in 2020, it has enhanced and added functionality to the LPM software by leveraging its organic growth and acquisitions, including secure file-sharing, electronic signatures, and a tightly integrated customer resource management (CRM) system. Rocket Matter maintains its development group and direct sales team, offering the LPM software in feature-based, tiered pricing plans.

Timekeeping and Billing
The dashboard view in Rocket Matter features a calendar timesheet, which provides a monthly view of time records and calendar events for you to review, edit, and create new items and set reminders. Click on a day to check calendar entries and timesheets. *See Figure 1*.

You can configure the user billing widget to display the number of hours billed for the day, week, or month. When you click on the widget, Rocket Matter shows the billable activity by user report in tabular format filtered by the logged-in user. If you have permission (Rocket Matter supports

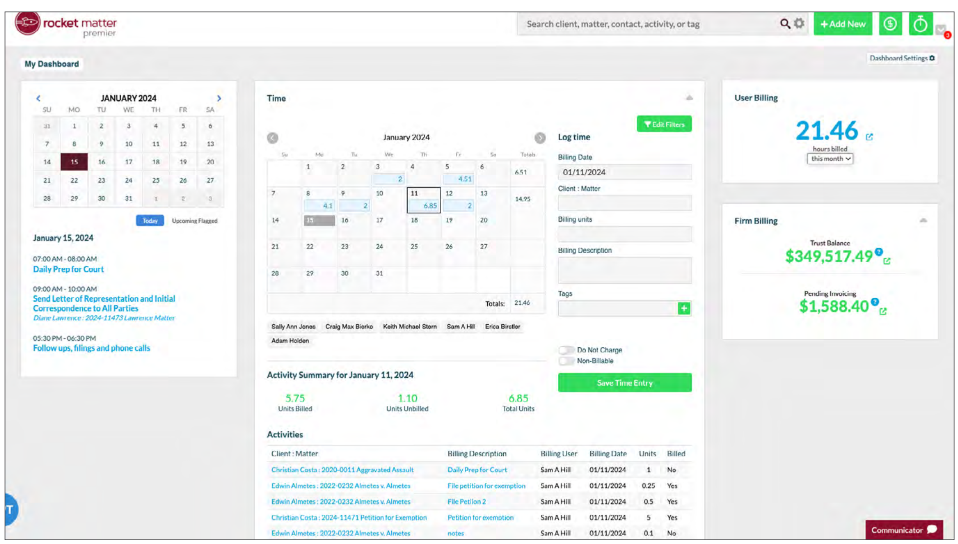


Figure 1: The Rocket Matter dashboard features a calendar view of time records and events, user billing (hours billed), and firm billing (trust balance over pending invoicing).

> **“View workflows and case progress in charts or on 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.”**

over 700 granular, role-based permissions to protect client and firm data), you can filter by other users and view firm billing, drilling into trust account balances and pending invoices.

When you drill into invoices, Rocket Matter displays its batch billing interface, where you can run invoices for the entire firm in one click. Before that, you can run prebills, send them out for review, and adjust them as necessary. Then, generate invoices using four predetermined templates or use custom templates in PDF, Word, or Excel format. *See Figure 2*.

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. Otherwise, you can integrate Rocket Matter with QuickBooks Online.

Time tracking remains challenging for busy timekeepers, and you may forget to record a time slip if you don't bill time as you perform a task or other action for a client. To avoid this issue, Rocket Matter's time tracking tools are available online and in Office 365 apps, including Outlook and Word. Rocket Matter allows you to associate a matter with a calendar event, task, note, or other action when you create it and mark it billable. After the event, or when the action is complete, Rocket Matter automatically creates a time entry for your work and bills the matter. You can also use timers on the web and mobile apps to create time entries. Still, it's too easy to forget how you spent your day in the detail required to generate time slips. To help you out, Rocket Matter offers Rocket Matter Track.

Rocket Matter Track automatic timekeeping logs your time in all your office applications, including email and web browsing. Download Track to your local computer or device, log in to Rocket Matter with your credentials, allow the app to record the computer screen, and create timers for client matters that automatically sync back to your online account. From Track, drag the appropriate activities to the timers you made for matters. *See Figure 3 on the next page*.

Rocket Matter supports LEDES (Legal Electronic Data Exchange Standard) 1998 and 1998B billing and Uniform Task-Based Management System (UTBMS) codes. But if a client has specific LEDES-based billing requirements, Rocket Matter supports custom field mapping—no programming knowledge is required. It supports bundling multiple client invoices into a single document with a cover sheet. Rather than

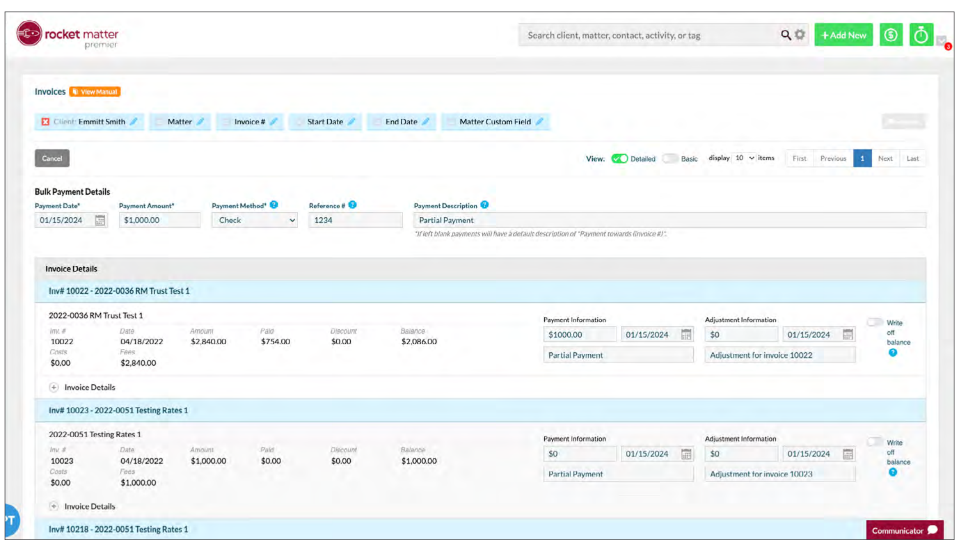


Figure 2: The Rocket Matter batch billing interface provides access to review, edit, and generate invoices.

> **“** Leverage Rocket Matter’s Business Intelligence module to build custom reports, empowering you to mix and match data and report it to make more informed decisions, find opportunities, and increase profits. Use key performance indicators (KPIs) such as throughput rate, average case value, and the time it takes to complete a matter from start to finish.”

receiving multiple emails with attachments, a client gets one email with an attachment containing numerous invoices.

You can also choose how you want to handle trust balances when generating invoices: apply trust balances to invoice amounts, hold trust balances in reserve to adjust invoices later, or do nothing and manage the payments manually. Like other documents generated in Rocket Matter, such as merged documents, invoices are automatically stored in the client’s matter documents folder.

Document and Workflow Automation
Rocket Matter **document automation** reduces clerical errors and allows you to track the time spent in template and document production. You can upload templates, documents, or forms to use as templates in Rocket Matter. Edit merged fields and repeated content, such as client, matter, and court information, in the uploaded templates and replace the content with Rocket Matter’s merge fields. When you automate document generation from a template, Rocket Matter replaces the merge fields with the client matter information in the database and stores the new document in the matter’s documents folder.

You can securely send files to clients and request electronic signatures from the web application or the Microsoft Outlook plugin. 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. Rocket Matter file-sharing features include secure client portals.

Workflow automation through **legal project management** in Rocket Matter empowers you to develop reusable templates and apply them to cases to generate tasks and staff assignments automatically, 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 on 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.

Legal CRM
Rocket Matter’s built-in Legal CRM allows you to intake potential clients, track leads, manage contacts and relationships, create automated marketing campaigns, and view

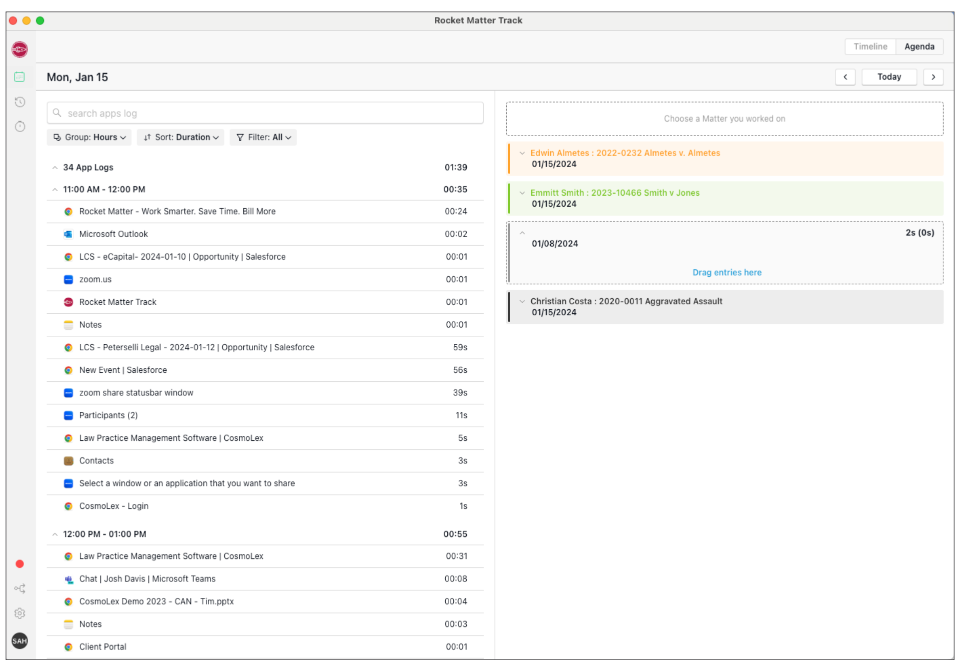


Figure 3: Rocket Matter Track, an automated time tracking system, frees you from spending time on time tracking and reports on how you spend time each day.

metrics and new client reports. When potential clients contact the firm, track their progress from marketing campaigns to a signed retainer.

The CRM tool can send leads a personalized follow-up email or SMS text with an intake form that populates data into the CRM, saving time and reducing errors. After review, send the lead a rejection letter or a one-click link to a client retainer with an e-signature request. Then, one click converts the new client data into a unique matter in Rocket Matter, where you can continue to automate by creating a new project and using the Kanban board to review case progress.

Business Intelligence
Leverage Rocket Matter's Business Intelligence module to build custom reports, empowering you to mix and match data and report it to make more informed decisions, find opportunities, and increase profits. Use key performance indicators (KPIs) such as throughput rate, average case value, and the 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.

Integrations
Rocket Matter supports integrations with many tools you may already use, including Office 365, QuickBooks Online, Dropbox, Evernote, and ChatGPT. The Office 365 plugin allows you 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, you can track time spent on email, synchronize Outlook contacts and calendars with Rocket Matter, and save emails and attachments directly to their respective matters. Other integrations include Google Calendar, LawToolBox, and Microsoft OneDrive.

The bidirectional OneDrive sync automatically makes a folder for the client workspace when you create 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.

With every Rocket Matter license, you get access to OpenAI's ChatGPT to get a jump start on document creation by sending queries or prompts and copying the output into a new document. Rocket Matter does not expose any of your data to OpenAI.

Pricing
Rocket Matter sells its software directly 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 start at $39, $69, and $89 per user per month (paid annually). The CRM tool is an add-on cost to the Pro and Premier plans.

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 575 employees who support more than 100,000 professionals in more than 250,000 matters and projects.

Why Buy Rocket Matter?
- Automatically track time across all applications, events, and activities and quickly add the records to timesheets.
- Turn time and expense records into prebills and invoices and edit, manage, and send them from one interface.
- Use legal project management to generate and assign tasks and view case progress in Kanban boards.
- Legal CRM tracks leads, manages contacts and relationships, and creates automated marketing campaigns.

See Rocket Matter Today!
See how Rocket Matter can make your life easier and your firm more efficient. **Schedule a demo today!**

Tabs3 by profitsolv

Tabs3 Software Meets All Your Time, Billing, Financial, and Practice Management Needs On-Premises or in the Cloud

> **"The dashboard in Tabs3 Billing is a way to see everything that is occurring and has been going on with the firm's billing. The dashboard displays graphs of recent and historical data for cash receipts and billing history, as well as current data on accounts receivable (A/R) and work-in-progress (WIP)."**

Company Name Brand
Tabs3 Software, a ProfitSolv company

Product Name Brand(s)
Tabs3 Cloud, Tabs3 Billing, Tabs3 Financials, Tabs3Pay, PracticeMaster, Tabs3 CRM, Tabs3 Websites, Tabs3 Connect

Latest Developments and Updates

- Access Tabs3 Billing and Financials from anywhere with Tabs3 Cloud.
- Make check requests from PracticeMaster to Tabs3 Accounts Payable.
- Tabs3 Websites integrates with Tabs3 CRM to help firms grow their practice.
- Client portal allows clients to view billing information and make secure online payments.

Tabs3: Aligned and Highly Integrated
Tabs3 legal practice management (LPM) software is available for on-premises and cloud deployments. You can quickly create billing invoices and send them electronically to clients with Tabs3 Billing, accept electronic payments with Tabs3Pay, and engage trust accounting, accounts payable, and a general ledger with Tabs3 Financials. With PracticeMaster, you can organize electronic case files and manage contacts, calendars, emails, documents, etc. You can also streamline client intake by adding Tabs3 CRM. Tabs3 products are fully integrated, allowing users to work seamlessly from one product to the next. Controls include dashboards, left and right panels, and menu-based tabs to access functions and icons in the lower-left corner to navigate between products.

Tabs3 Billing
The Dashboard in Tabs3 Billing is a way to see everything that is occurring and has been going on with the firm's billing. The

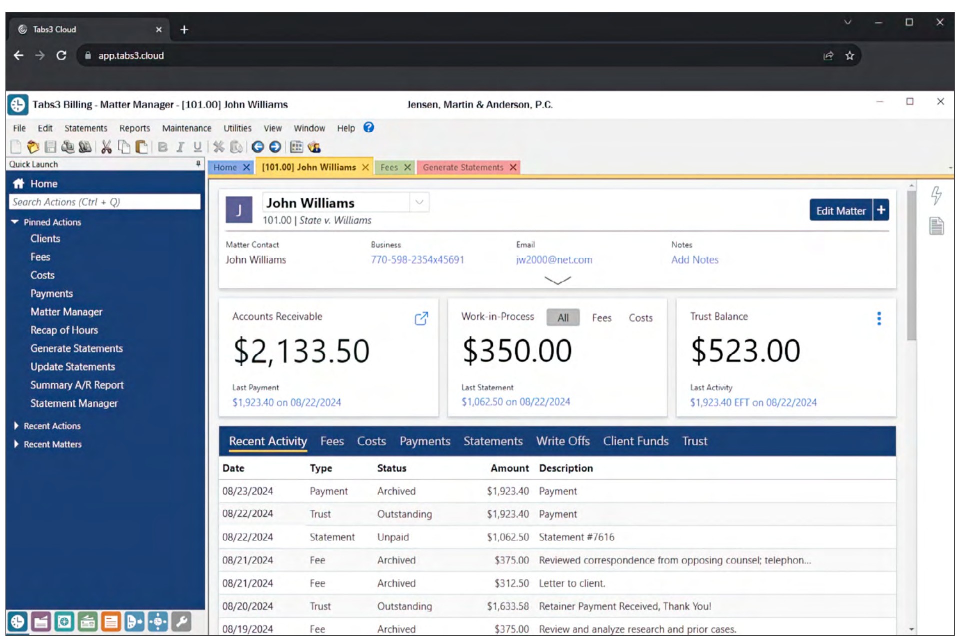


Figure 1: The Tabs3 Billing Matter Manager provides a detailed view of client billing.

> Tabs3Pay can process client payments using credit or debit cards and automated check handling (ACH) information. The processing can store client payment methods and schedule future or recurring payments in days, weeks, or months."

dashboard displays graphs of recent and historical data for cash receipts and billing history, as well as current data on accounts receivable (A/R) and work-in-progress (WIP). Drill down into the reports for details, such as WIP listed by clients with tabular data for total A/R, payments, fees, and costs.

In the Matter Manager, summary data clearly shows how much the client owes (accounts receivable), how much work is in progress (not billed), and the trust balance. Below the summary information, Tabs3 provides detailed information in subject matter tabs for recent activity, fees, costs, payments, statements, write-offs, client funds, trust, and trust requests, where you can track all requests made to the client to add to trust funds. *See Figure 1 on the previous page*.

In the statements tab, view a list of statements to print, email, and apply or schedule a payment with Tabs3Pay. An exclamation point appears next to the trust balance if the balance is below a set minimum. In one click, you can email a request to the client to make a payment through a "Make Payment" link embedded in the email. The link takes clients to a secure portal to add funds to their trust balance.

Tabs3Pay can process client payments using credit or debit cards and automated check handling (ACH) information. The processing can store client payment methods and schedule future or recurring payments in days, weeks, or months.

The right tab in a matter provides access to transactions, statements, and other actions. You can add fees, costs, payments, schedule payments, and perform write-ups and write-downs. You can generate, edit, and email statements and access other functions to adjust client portal settings, manage payment methods, manage trust accounts, and view the matter in PracticeMaster.

Manage a client's trust fund by adding a desired minimum balance and selecting whether to apply funds to pay the amounts due. When the trust balance falls below the desired minimum balance, Tabs3 Billing can automatically request replenishment or not, leaving you to make a manual request.

Tabs3 Financials and Trust Accounting
Trust Accounting and other accounting modules in the Tabs3 Financials suite are customizable and track all transactions through separate systems. Tabs3 Trust Accounting functions do not interface with the firm's operating accounts or other financial operations. Tabs3 encapsulates trust accounting in its program area, providing a three-way reconciliation report with client trust ledger balances, adjusted bank accounts, and the check register balance. Import the firm's banking

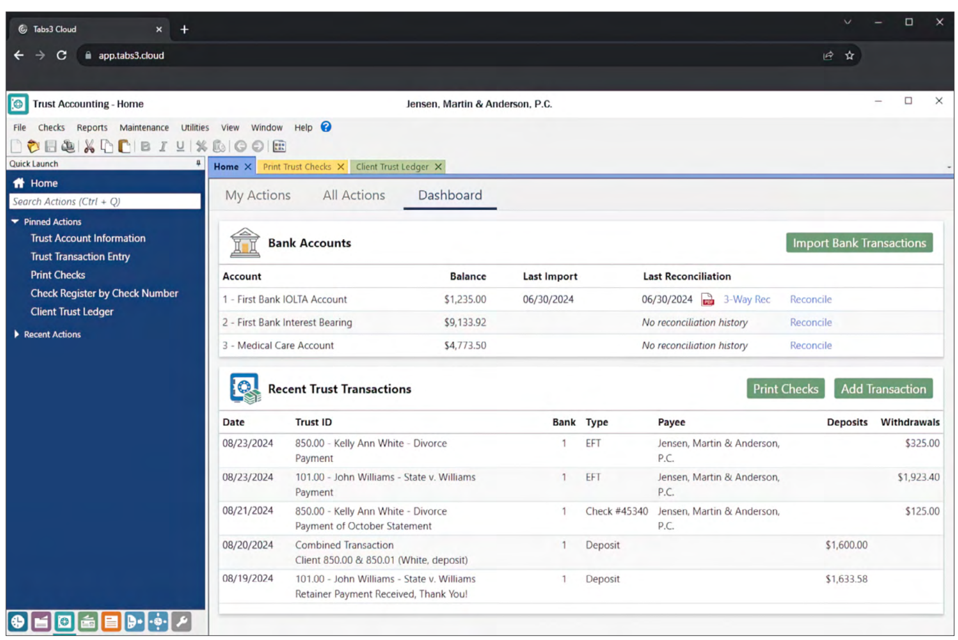


Figure 2: The Tabs3 Financials trust accounting home page provides comprehensive information and the ability to execute various transactions.

> **“The home tab in PracticeMaster includes a dashboard with a calendar to review schedules and add events, view and manage tasks, and review billable, non-billable, and unprocessed timers in a colored bar chart. You can drill down into the chart to review completed work.”**

information into Tabs3 Financials and reconcile accounts with banking transactions in minutes rather than hours. *See Figure 2 on the previous page*.

Like Trust Accounting, Tabs3 Financials has two additional modules to round out a firm's financial system, including Accounts Payable and General Ledger. Tabs3 Financials provides a quick view of all account balances with financial statements, balance sheets, income and cashflow statements, and general ledger reports showing a transactional history over a select period to compare current balances to prior months and years.

Tabs3 also keeps tabs on accounts payable. A new feature in PracticeMaster allows users to make check requests to pay fees and costs on behalf of clients. You can set up an automatic approval when dollar amounts are below a set minimum, and when payment requests are above the minimum, set up a workflow to approve the expense.

PracticeMaster Matter Management
PracticeMaster is Tabs3 LPM software and the heart and mind of the firm's legal work. It keeps matters organized, allows users to perform conflict checks, and manages calendars, which integrate with Microsoft Outlook. PracticeMaster stores client-matter documents and supports integrations to save files from Microsoft Word and Excel, Windows Explorer, Adobe Acrobat Reader, NetDocuments, and Worldox. An internal messaging system lets you contact logged-in staff on demand and links any relevant item in PracticeMaster, such as a client note or calendar event.

The home tab in PracticeMaster includes a dashboard with a calendar to review schedules and add events, view and manage tasks, and review billable, non-billable, and unprocessed timers in a colored bar chart. You can drill down into the chart to review completed work. The dashboard also tallies the total hours for select periods and calculates firm income. *See Figure 3*.

PracticeMaster shows a timeline of all activities or actions and handles all clients' work history, including emails, documents, fees, appointments, costs, and research notes, in one place. You can easily access a billing summary from the Matter Manager to view client billing status and trust account balances. You can view all contacts associated with the client matter and expand the view to see all the relevant cases for individual contacts.

Use PracticeMaster data to fill forms and contracts automatically using document assembly (Microsoft Word is required). PracticeMaster Document Assembly can automatically bill clients for document generation and output files directly into the matter's document folder. Use LexShare to securely send and receive clients' documents and request electronic signatures.

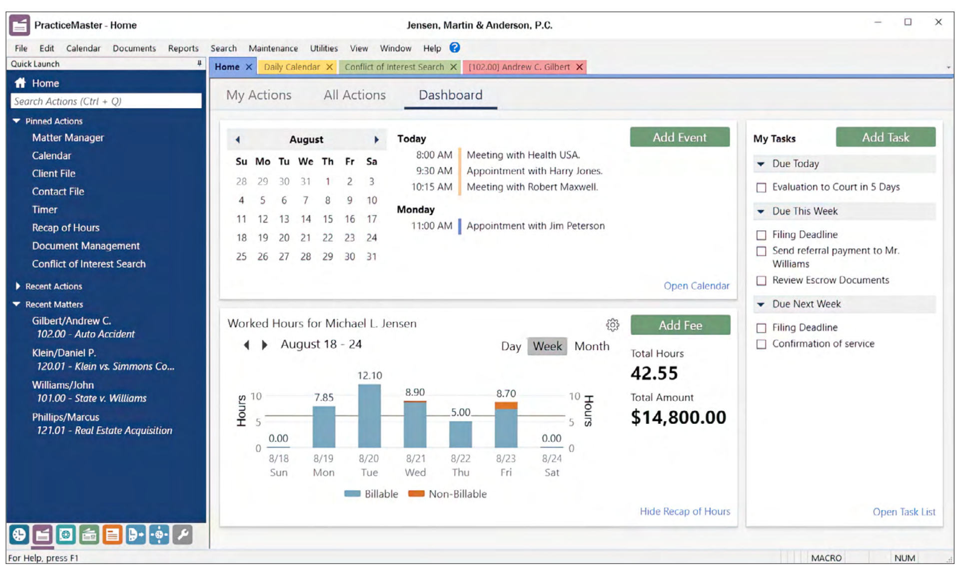


Figure 3: PracticeMaster's home page with tabbed views of actions and a dashboard featuring a matter-focused calendar, timesheets, and tasks.

Workflow automation in PracticeMaster will save time, accomplishing tasks quickly and automatically. PracticeMaster can automate drafting emails, adding calendar appointments, setting reminders, running reports, and creating and assembling documents. For example, where a personal injury case has multiple medical service providers, select the contacts and PracticeMaster can generate a request for medical records from each and draft an email to them. As you verify and send the email, a fee entry is charged to the client, and an automatic reminder is created to follow up if you do not receive the records promptly. You can include up to ten steps per workflow.

PracticeMaster allows you to collect client data using practice area templates that update client pages based on matter types. You can customize and create relevant data fields for various matters in a custom arrangement. For greater control over the intake process, add **Tabs3 CRM**, a client relationship management (CRM) application to track leads and manage prospective clients from multiple marketing sources, and import new clients into PracticeMaster. For advanced growth potential, a website from **Tabs3 Websites** provides content and search engine optimization to attract potential clients searching for legal services and gather lead information that is imported directly into the CRM.

Use PracticeMaster remotely and securely with Tabs3 Connect. With Connect mobile access, you can securely create time entries, manage your calendar and tasks, and review any matter while you are out of the office. Connect allows you to log in from your Android or Apple smartphone, tablet, or any computer with an internet connection.

Tabs3 Billing, Tabs3 Financials, and PracticeMaster have many standard reports that can be filtered using client data, time, timekeepers, and more. If you need a custom report, the software supports a report writer.

Integrations and Private/Public Cloud
Tabs3 Billing and Tabs3 Financials integrate with Tabs3Pay in Tabs3 Cloud. Tabs3 Billing works with QuickBooks, and Outlook, which can send PDF bills to clients. PracticeMaster integrates with Outlook, HotDocs, and Word document assembly, CalendarRules, NetDocuments, LexShare, ScanSnap, and PaperPort.

Besides purchasing a subscription to Tabs3 Cloud, firms can license the full suite of Tabs3 Software on-premises or work with recommended hosting partners ProCirrus, Uptime Practice, or CyberlinkASP.

Pricing
A Tabs3 Cloud subscription including Tabs3 Billing, Tabs3 Financials, Tabs3Pay, and Tabs3 Connect, starts at $89 per month per user. A Tabs3 OnSite subscription including Tabs3 Billing, Tabs3 Financials, and Tabs3 Connect, starts at $40 per timekeeper per month—add $32 per PracticeMaster user per month. LexShare has an add-on cost of $52 per month (billed annually), and Tabs3 CRM is an additional $147 per month (billed annually) for up to three PracticeMaster users. Tabs3 Websites costs $149 monthly with a one-time setup fee of $599.

Who is Tabs3?
Tabs3 Software provides an intuitive, integrated suite of legal billing, practice management, accounting, payment, CRM, and website solutions that combine privacy, security, and advanced performance with fast, flexible, work-anywhere functionality. Tens of thousands of legal professionals rely on Tabs3 every day to do more in less time. Tabs3 clients can choose from Tabs3 Cloud, privately hosted, or on-premises server options. All include outstanding US-based support.

Software Technology, LLC, based in Lincoln, Nebraska, is the maker of Tabs3 Software and has been a leader and innovator in the legal tech industry for 45 years. They are part of ProfitSolv, a collection of best-in-class software solutions for professional services firms. ProfitSolv's mission is to support client growth and profitability by solving business problems with integrated, easy-to-use technology solutions.

Why Buy Tabs3 Software?
- On-premises legal practice management software with time, billing, financial reporting, and trust accounting.
- Tabs3 Cloud makes Tabs3 Billing and Tabs3 Financials a one-stop shop for law firm financial operations.
- Use separate but integrated financial tools to manage billing, accounts payable, and operating and trust accounts on-premises or in the cloud.
- Tabs3 CRM and Websites track leads and import qualified prospects into PracticeMaster.

See Tabs3 Software Today!
Ready to learn more about how Tabs3 Software can help your firm streamline activity and do more in less time? **Schedule a demo!** Tabs3 also offers a free trial of Tabs3 Billing, Financials, and PracticeMaster software – **request one today!**

ZenCase

ZenCase's Intuitive and Customizable Software Solves Complex Problems and Accomplishes the Most Work with the Least Effort

> "ZenCase 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. The software can also generate 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

- Use generative AI (artificial intelligence), ZenGPT, which incorporates ChatGPT, to create documents and conduct legal research to save time and increase firm productivity.
- Trust account reconciliation compares trust general ledgers, client ledgers, and bank statements within ZenCase.
- Use multiple categories to organize document automation blueprints and save and apply custom filters to find them quickly.
- Set percentage for originators' fee allocation as general business rules with matter-specific overrides.

Overcome Daily Challenges
ZenCase cloud-based law practice management (LPM) software helps law firms overcome daily challenges, grow, and become successful. The software-as-a-service (SaaS) is intuitive, easy to use, and customizable. Core features include case and contact management, project management, knowledge management, time and billing, and expense tracking. ZenCase helps lawyers more effectively capture time, reduce errors, and improve data accuracy with document and workflow automation and automated time management.

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

The ZenCase user interface (UI) applies a single-click rule where most actions provide results in one mouse click to reduce effort and time. The web-based UI sports a search box with access to notifications, the

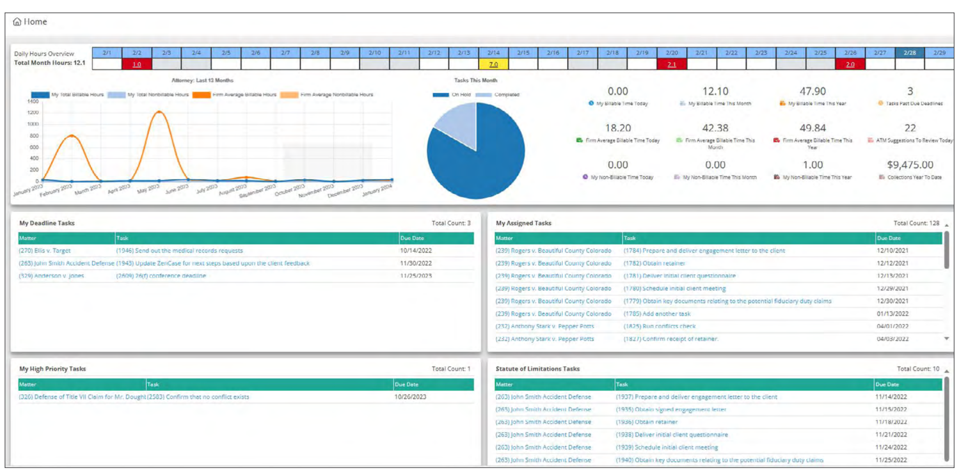


Figure 1: ZenCase landing pages display a customizable, data-driven dashboard of reports, including a daily hours overview, billable hours submitted in the last year, total billable hours, and task management with statute of limitations tasks.

> **ZenKM helps organize trial or deposition workflows 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."**

support desk, and a function to quickly add content, such as a new client or time entry. The left panel navigates all LPM features, including contacts, matters, tasks, reports, invoices, payments, and knowledge management (ZenKM).

You can access favorites, bookmarks, and start timers from any web page, but you don't need manual timers to track billable time. ZenCase 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. The software can also generate an alert and remind you to record time spent on a client task.

The system manages customer relationships, tracks all connections, including individuals and organizations, and shows how they interconnect and relate to matters.

Matters, ZenKM, and ZenGPT

ZenCase brings all matter data into focus, including related material and contacts, without creating information overload. A matter summary is displayed across the top of the UI, including matter name, number, originator, manager, client, status, and matter type, with a separate tab presenting summary billing data. More detailed billing and other content information appear in a tabular format underneath the top. Beneath that, there are tabs to access matter tasks, memos, files, charges, billing, mail, trust transactions, credit transactions, ZenKM, and more.

ZenKM helps manage case or firm-related knowledge and information. It includes tabbed or card displays of subjects, facts, questions, answers, authorities, connections, documents, and memos, where each tab has columnar data for various fields. With the ZenCase Chrome extension, you can send and save browser content such as primary authority, documents, and even emails to ZenCase. If you use a different browser, ZenKM can save the hyperlink in the context of other materials. ZenKM links 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 helps organize trial or deposition workflows 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. Create custom records and dynamic questionnaires to automate complex documents with client data, such as compliant regulatory filings, using ZenKM. You can also use an artificial intelligence bot, ZenGPT, to conduct legal research and draft documents. ZenGPT learns from the data stored in ZenCase to save time for staff and attorneys and increase firm productivity.

Document Automation

Automating document creation in ZenCase is more straightforward than using

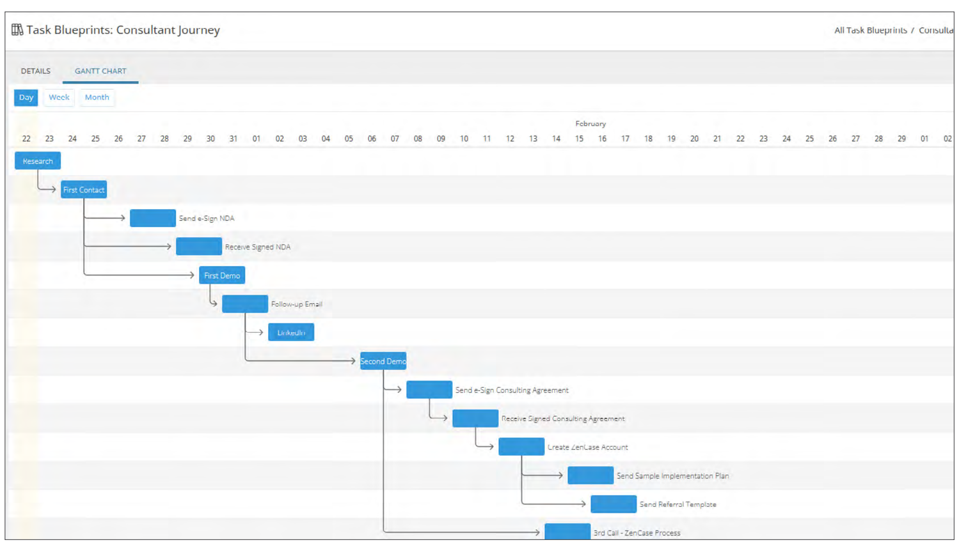


Figure 2: ZenCase's Gantt Chart view of a task blueprint you can reuse for multiple clients and matters.

> “You can create a task in one click by adding the task name, description, type, member type (to assign a user by member role), priority, fee type, duration, budget hours, and deadline. If you have several tasks to accomplish an objective for a client or matter type, create and add them to a task blueprint.”

Microsoft Word Mail Merge. Rather than using merge fields, ZenCase uses blueprint fields in a document to pull data from a matter, such as a client, contact, and matter name, and import it into a document. On import, matter data populates the corresponding blueprint fields written as {client_name}, where curly braces enclose field names.

You can create a document blueprint and reuse it in multiple matters. Create a Word document, use blueprint fields as variables, save it, and upload it to ZenCase by selecting Add Document Blueprint from the Document Blueprints page linked in the left sidebar menu. From a matter profile page, select Create a Document and choose a new or recent blueprint or choose from the library.

ZenCase will best match the fields with any available matter information and present it in a preview window for you to finalize and add information to any missing fields. Save the document, and it becomes available from the Matter Files tab.

Task Blueprints

You can create a task in one click by adding the task name, description, type, member type (to assign a user by member role), priority, fee type, duration, budget hours, and deadline. If you have several tasks to accomplish an objective for a client or matter type, create and add them to a task blueprint.

Add a task blueprint from Task Blueprints in the left navigation bar. Then, add the individual tasks to accomplish a client or matter objective; use predecessor or successor dependencies to form a workflow from one task to another. Most tasks will start before or after another, but you can begin or make them due simultaneously and set lag times between tasks in calendar or business days.

After you enter all task dependencies, you can click the Gantt Chart tab to view how your dependencies associate one task to another. *See Figure 2 on the previous page*.

Time, Billing, and Accounting

ZenCase reduces the time and effort spent on firm financials and brings visibility and insight for law firms to manage time, billing, and collections. You can use manual timers to add time to a matter and easily add time and expense records to matters, adding any related information as an attachment, like a receipt or itinerary. ZenCase can enforce business rules on expenses and time records to meet client budgets and requirements.

On the Time & Expenses page from the left navigation bar, find all your time and expense entries to manage and review billing information. A calendar overview at the top of the page shows the total daily hours, hyperlinked to daily time entries. Add time entries, fixed fees, and expenses manually and use filtered views to manage all entries. You can import entries from a CSV file or use ZenCase’s Automated Time Manager (ATM). *See Figure 3*.

ZenCase supports Legal Electronic Data Exchange Standard (LEDES) billing and variable LEDES code sets for 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, invoice summaries, and customized cover

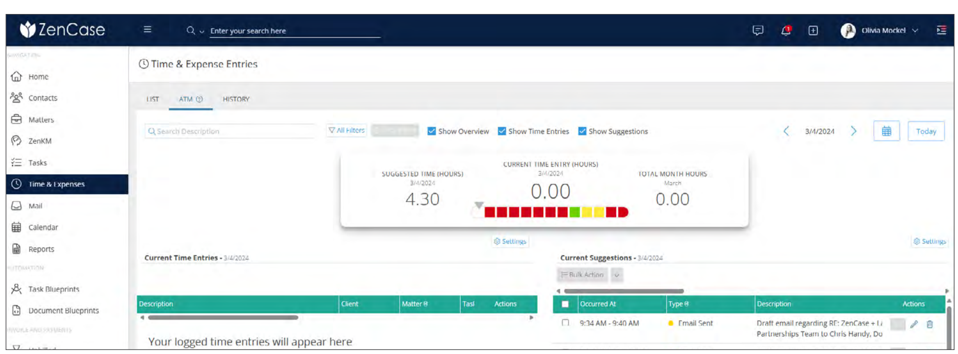


Figure 3: ZenCase ATM can suggest time entries based on your activities and events spent on clients and matters, including calendar events, email and document generation, and tasks completed.

letters. The system supports trust accounting client refunds, allocates payments to expenses first and then pays multiple invoices, and supports pay when paid, which is ideal for the firm wanting to pay service providers after receiving payment from the client.

Reporting
ZenCase has two types of reports: standard and custom. Standard reports support all firms, such as aging reports on accounts receivable, client invoices and payments, collections overview, time entries, and more. ZenCase creates new standard reports regularly, like a work-in-progress report on all unbilled charges. Use filters on standard reports to display complex data without SQL search queries.

With a custom report builder, law firms can 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, including the ability to create, view, update, and modify objects in ZenCase, such as blueprints, contacts, matters, and more.

Integrations and Cloud Services
ZenCase uses a multi-tenant software architecture in Amazon Web Services (AWS). The SaaS platform supports an application programming interface (API) integrating popular document management services, including Box, Microsoft SharePoint, and NetDocuments. These services operate within the ZenCase user interface, not in a separate window. ZenCase also integrates with Microsoft 365 and Outlook.

Although ZenCase handles billing, collections, reporting, and managing trust balances, the software supports tight integration with QuickBooks Online, where you can best view financial statements such as the income statement and balance sheet.

Pricing and Data Migration
ZenCase costs $999 per user per year with no hidden costs. The software uses an industry-standard data structure that accepts CSV data migrations. The company works closely with several leading consultants who can prepare and migrate data for more complex migrations.

Who is ZenCase?
Jacksonville, Florida-based Groundswell Productivity Solutions, doing business as ZenCase, makes its namesake cloud-based law practice management system for lawyers and law firms to find better ways to solve complex day-to-day problems, create work product in less time and with less effort than other solutions, and reduce administrative overhead. Thomas J. Fraser, Jr., CEO and founder, leads ZenCase, which is sold in North America, primarily in the US. ZenCase was selected as "Case Management Solution of the Year 2023" in the fourth annual LegalTech Breakthrough Awards program and was a finalist in Legalweek's Leaders in Tech Law Awards 2024 for the Innovating Knowledge Management and Practice Management Innovation categories.

Why Buy ZenCase?
- Quickly solves complex problems in law practice management, including managing time and expense entries, sending invoices, and getting paid.
- Efficiently creates work product using document automation (blueprints).
- Create and reuse task blueprints to accomplish client and matter objectives.
- Automated Time Manager suggests time entries from work accomplished for clients and matters.

See ZenCase Today!
See how you can create better work product with less effort—more Zen!
Schedule a demo today.

Practice Support Solutions

Get Staffed Up Partners with You to Maximize ROI on Human Talent

Get Staffed Up Partners with You to Maximize ROI on Human Talent

> “Get Staffed Up has been recognized for its ability to provide top-tier administrative talent to US law firms, focusing on the top 1% of English-speaking virtual assistants from Latin America and South Africa.”

Company Name Brand
Get Staffed Up

Product Name Brand(s)
Get Staffed Up: Legal Assistants; Intake Specialists; Executive Assistants; Receptionists; Marketing Assistants; Client Happiness Coordinators; Billing Assistants

Latest Developments and Updates

- Attorney and Co-Founder of Get Staffed Up, Brett Trembly, launched a book in 2023 to help law firms hire smart, and the **first three chapters are available for download.**
- Get Staffed Up offers offshore staff for these seven positions: executive assistant, legal assistant, intake specialist, billing assistant, marketing assistant, client happiness coordinator (customer support), and receptionist.
- As market leaders and innovators, Get Staffed Up continually seeks to serve both new and current clients better. In the coming months, look to Get Staffed Up for new administrative positions.

Avoid Staffing Headaches
Get Staffed Up specializes in virtual staffing solutions for law firms of all sizes across all disciplines. They offer a range of remote professionals, including legal assistants, receptionists, intake specialists, and marketing assistants. The company focuses on hiring from Latin America and South Africa, ensuring that the staff they provide are degreed, proficient in English, and capable of handling client-facing positions. Get Staffed Up aims to help law firms and other service industries reduce labor costs while still maintaining high-quality support with offshore virtual assistants who work full time and are dedicated to one client. *See Figure 1*.

Get Staffed Up is known for its resourceful approach to virtual staffing, particularly in the legal sector. The company has been recognized for its ability to provide top-tier administrative talent to US law firms, focusing on the top 1% of English-speaking virtual assistants from Latin America and South Africa.

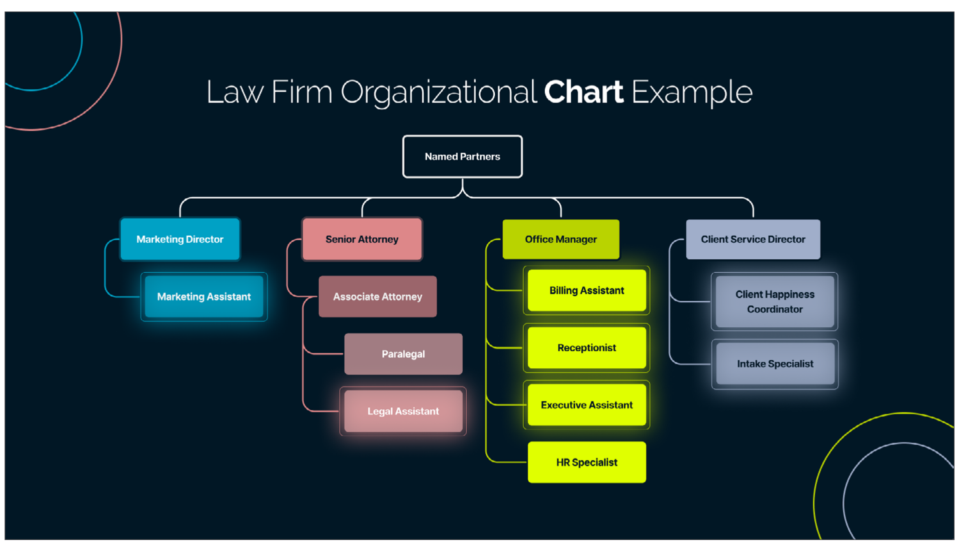


Figure 1: Get Staffed Up has identified seven virtual assistant roles and how they can fit into a law firm's organizational chart. A firm can ramp up its staff without ramping up its costs.

> "Get Staffed Up is generally regarded for its performance and reliability in providing virtual staffing solutions, and clients often highlight the quality and consistency of staff. Law firms and service industries repeatedly report high levels of satisfaction with the virtual professionals provided."

Guilty of Finding You Top Degreed Professionals from Latin America and South Africa

Setting Get Staffed Up apart is their proprietary matchmaking process. Get Staffed Up recruits and interviews candidates, looking for individuals with excellent language skills, strong writing abilities, and a positive attitude. Once you are up and running, you have a go-to dedicated client happiness coordinator who supports your needs. On the off chance your staffer doesn't work well with your firm, Get Staffed Up will find you a better fit free of charge.

In terms of innovation, Get Staffed Up has streamlined the process of connecting law firms with international talent, ensuring a match that benefits both the firm and the assistant. They have expanded their service offerings beyond traditional phone answering positions to include executive, billing, intake, marketing, and legal assistants, among others.

Get Staffed Up is generally regarded for its performance and reliability in providing virtual staffing solutions, and clients often highlight the quality and consistency of staff. Law firms and service industries repeatedly report high levels of satisfaction with the virtual professionals provided. Get Staffed Up offers ongoing support, training, and resources for their staff and clients, contributing to the reliability of their services. Overall, client feedback suggests that Get Staffed Up maintains a strong reputation for delivering dependable virtual staffing services.

Looking to the future, Get Staffed Up will continue leveraging technology to enhance its matching process and expand its services. As the demand for virtual services grows, Get Staffed Up may also explore new markets and industries, adapting its offerings to meet the evolving needs of businesses looking to outsource administrative tasks.

Pricing

Get Staffed Up provides full-time 40 hour per week staffers contracted monthly, not yearly. Pricing varies per remote position but is readily available on GetStaffedUp.com. Get Staffed Up helps your firm avoid many HR complexities, extending savings and ensuring you get the most out of every dollar spent. *See Figure 2*.

And if you need to fill multiple administrative positions? Starting with and maintaining a minimum of 10 Get Staffed Up virtual assistants may qualify you for a savings of over $200,000!

Who is Get Staffed Up?

Get Staffed Up was founded in 2017 by lawyers and designed for law firms. The company was started with the mission of helping lawyers delegate their way to freedom by offering full-time, offshore virtual assistants.

	Hiring on your Own	Hiring with
Intake Specialist	$3,604	**$2,145** $1,459
Billing Clerk	$4,670	**$2,145** $2,525
Legal Assistant	$4,217	**$2,295** $1,922
Receptionist	$3,288	**$1,995** $1,293
Marketing Assistant	$4,425	**$2,295** $2,130
TOTAL	**$20,204**	**$10,875** Total Saved: **$9,329**

Figure 2: Get Staffed Up can save clients up to 50%, and possibly more, on staffing costs by providing qualified staff. Because Get Staffed Up takes care of all administrative issues for payroll and benefits, clients can focus on getting work done.

"Once you are up and running, you have a go-to dedicated client happiness coordinator who supports your needs. On the off chance your staffer doesn't work well with your firm, Get Staffed Up will find you a better fit free of charge."

Get Staffed Up is an active member of the legal community, taking part in various conferences and events. Co-founder Brett Trembly will keynote two conferences, The Law Firm Growth Summit and Raise the Bar Live, in May and June, respectively. *See Figure 3*.

In addition to in-person events, Get Staffed Up hosts a **Facebook group – The Liberated Lawyer Lifestyle** – an ideal safe space for posing questions about how a firm can efficiently and effectively grow, including topics like how and to whom you should delegate calendar and email inbox management. Get Staffed Up has been on the Inc. 5000 list for two years in a row.

Why Use Get Staffed Up?

- Founded by lawyers, designed for law firms.
- Get Staffed Up's vetting and pre-testing process, combined with their unique matching accuracy software, leads to low turnover and high success rates.
- Through propriety processes, Get Staffed Up matches a firm with the top 1% of English-speaking, degreed professionals from Latin America and South Africa.
- Get Staffed Up staffs 40-hour per week professionals who work solely for and are dedicated to one firm.
- Whether Get Staffed Up clients are solo practitioners just starting or part of big law, Get Staffed Up is a go-to resource for staffing. They believe in working alongside a firm to help achieve their goals. Clients are not tied down with long-term staffing contracts, and attractive pricing packages are available when more than one position needs to be filled.

How to Grow with Get Staffed Up

Get Staffed Up provides a survey for firms to identify what type of virtual assistant would best suit their needs. Learn more about Get Staffed Up and how they can assist your firm with staffing, **schedule a call now!**

Figure 3: Get Staffed Up and co-founder Brett Trembly actively participate and support the legal community through publications and industry conferences.

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