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TIME, BILLING & PAYMENTS

BUYER'S GUIDE

Time, Billing & Payments Buyer's Guide

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Solution by Firm-Size			Corporate Solution
Small Firms: 1-25 Attorneys	Midsize Firms: 26-100 Attorneys	Large Firms: 101+ Attorneys	Corporate Legal
    	    	   	

About

The Time, Billing & Payments 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 Time, Billing & Payments Buyer's Guide

By: Cathy Kenton and Brian Dalton



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

For legal professionals, time and billing is the necessary evil to getting paid. From yellow note pads to early electronic billing software to today's advanced and integrated applications, few will argue that time tracking and invoicing are the lifeblood of most practices. In this guide, we explore today's leading products and provide in-depth reviews.

Use this guide to explore the latest in this critical legal tech category.

To your success,

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

Brian Dalton,
SVP, Breaking Media



Brian Dalton, SVP, Breaking Media

Time, Billing, Invoicing, and Payments



LawPay Provides More Ways to Get Paid
Easier, Faster, and Securely All While
Maintaining Industry Compliance



TimeSolv Makes it Easy for Law Firms to
Record Time, Bill Accurately, and Get
Paid Online and On Time

LawPay Provides More Ways to Get Paid Easier, Faster, and Securely All While Maintaining Industry Compliance

“Starting with the Charge option, firms can select from multiple ways to get paid. Choose the account (operating or IOLTA) to initiate a payment request with options to access or send an invoice.”

Company Name Brand
AffiniPay

Product Name Brand(s)
LawPay

Latest Developments and Updates

- Partnership with QuickBooks Online allows users to automatically upload LawPay transactions with QuickBooks Online, making reporting and reconciliation even easier.
- LawPay's Pay Later Solution is a legal fee lending solution designed specifically for professional service providers.
- LawPay Pro rolled out in April 2023. This new product tier bridges the gap between Legal Billing and Legal Practice Management.

- AffiniPay (parent company of LawPay) acquired legal practice management software, MyCase.

More Ways to Get Paid!

Managing a law firm's business involves various moving parts, some easy, and some not. Getting paid, however, should not be as difficult as it often is. **LawPay provides multiple ways** to get paid securely and within ABA and IOLTA guidelines.

When users open LawPay, the initial screen displayed is a dashboard, providing a clear overview of payments. Users see a snapshot of month-to-date and year-to-date information, including payment volume, transactions, and average transaction amounts. The visualization shows payment

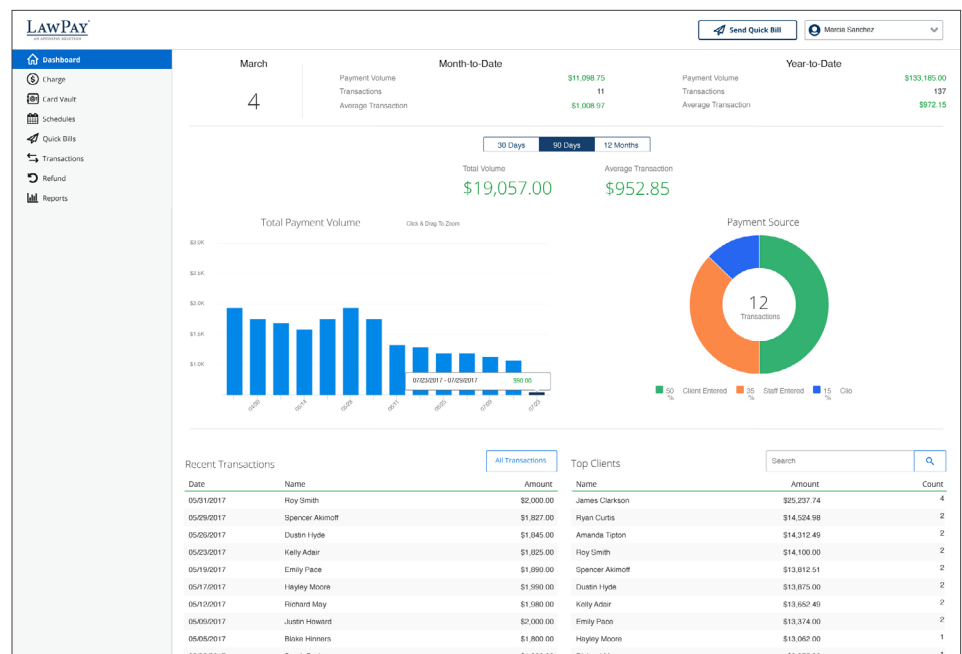


Figure 1: The LawPay Dashboard provides access to options for the areas Charge, Card Vault, Schedules, Quick Bills, Transactions, Refund, and Reports. The customizable Dashboard delivers a picture of the firms' payments and outstanding invoices.

“Using QR codes is another method for clients to pay a bill. Each QR code is linked to a bank account. Clients can scan the QR code on an invoice and fill out the payment details from a mobile device.”

information for 30 days, 90 days, and 12 months and is represented in a graph of total payment volume over time.

The left navigation pane includes links to areas within LawPay to see greater detail, including Dashboard, Charge, Card Vault, Schedules, Quick Bills, Transactions, Refund, and Reports. *See Figure 1 on the previous page.*

Billing and Payment Flexibility

Starting with the Charge option, firms can select from multiple ways to get paid. Choose the account (operating or IOLTA) to initiate a payment request with options to access or send an invoice. Clicking on Accept Payment will bring up the Invoice Payment page that the firm can fill out. You can accept payment by credit card or eCheck. If a client wants to pay via credit card, the process is similar to most retail sites, where a user enters their card number, expiration date, and CVV number.

The Send Link button opens an email with a link to the payment page where an attorney can select the account to deposit payment in, an amount, email address, reference note such as invoice number or matter name, email subject, and email

text. The client will receive a link to pay the invoice and enter how they would like to pay their bill in the sent message.

The Show & Copy page is another option available under the Action drop-down menu. This gives the client a link to the Invoice Payment screen. You can also add a hyperlinked Pay Now button to an attorney's website or include a link on an invoice sent to the client.

Using QR codes is another method for clients to pay a bill. Each QR code is linked to a bank account. Clients can scan the QR code on an invoice and fill out the payment details from a mobile device.

Send a Quick Bill is yet one more way to deliver an invoice. Similar to the Send Link option, a user will enter a client's email, name, payment amount, deposit account, reference number, subject line, and email text and add an attachment if needed. Clients receive an email with Click Here to Pay, directing them to the appropriate payment page.

Once the client clicks Submit Payment at the bottom of a payment page, the client and attorney both receive an email receipt.

AP
AFFINIPAY

AffiniPay
3700 N. Capital of Texas Hwy,
Suite 300
Austin, TX 78746
(855) 656-4685
support@affinipay.com
<http://www.affinipay.com>

Invoice Payment

Payment Detail

Payment Amount

Reference

Client Information

Email Address

Payment Method

☐ CARD ☐ ECHECK ☒ PAY LATER

CLIENTCREDIT + affirm

You have multiple options in how to pay, but for your convenience we have partnered with Affirm to offer a flexible financing solution. Click below to begin completing your payment with Affirm. It's quick and secure, and you'll get a real-time decision. Your lawyer is not receiving referral compensation if you select this option.

Start by entering your full name:

First Name Last Name

Click "begin process" and continue to Affirm to enter a few pieces of information and apply to get a real time decision. Then select a payment schedule that works for you and confirm your loan agreement. Your application will be processed exclusively through Affirm and its lending partners, not your legal representative.

Begin Process

US consumers only. Affirm is not available to entity customers who would use Affirm financing for business or commercial purposes. Subject to credit eligibility and approval. [See terms](#)

Figure 2: LawPay's Invoice Payment detail page includes LawPay's newest way to get paid—Pay Later, a “Buy Now, Pay Later” option.

“Pay Later is a new first-of-its-kind feature in the legal market, allowing firms to present a “Buy Now, Pay Later” option. A firm will receive the total invoiced amount at the start of an engagement while offering clients the option to pay an invoice in multiple payments over time.”

LawPay Pro – NEW

LawPay Pro is a new product tier that includes features already available in LawPay with additional components enabling a firm to manage its billing and time-tracking from start to finish. LawPay Pro features include:

- Billing, invoicing, and trust reconciliation.
- Time and expense tracking.
- Accounts receivable dashboard.
- Contact management.
- Scheduled payments.
- Text to pay.
- Legal fee lending solution, Pay Later.

Pay Later and Integrations

Pay Later is a new **first-of-its-kind feature in the legal market**, allowing firms to present a “Buy Now, Pay Later” option. A firm will receive the total invoiced amount at the start of an engagement while offering clients the option to pay an invoice in multiple payments over time. LawPay uses Affirm to give clients the option to pay over time and maintain a budget with no hidden fees and upfront information on any interest payments. This service helps both the client and the law firm; the firm doesn't have to wait for their payment, and the client doesn't have to come up with a lump sum.

A firm can choose to accept Pay Later payments on all operating and trust

account payment pages. Simply click Accept Payment, and an Invoice Payment page will open for the client to select Pay Later and fill out the relevant information. *See Figure 2 on the previous page.*

LawPay integrates with Kenect to help firms get paid up to 85% faster by sending clients bills via text. In addition to collecting payments, firms can text clients from their desktop or mobile application, video chat directly from a text, and place a “Text Us” widget on the firm's website.

Integrations with several other applications provide solutions for accounting and finance, conflict checking, CRM, document management, financial institutions, immigration, practice management, time and billing, and others.

Card Vault

LawPay provides a secure location within the application to store payment details for every client. A firm can go into the card vault with client permission and charge clients for agreed-upon amounts. Additional information available in the vault includes warnings if a card is expired, rejected for insufficient funds, or exceeded its credit limit.

The screenshot shows the LawPay web application interface. At the top, there's a header with the LawPay logo, a 'SEND QUICK BILL' button, and a user profile dropdown for 'Brian Anderson'. The left sidebar contains navigation icons and labels: Dashboard, Charge, Card Vault, Schedules (highlighted), Quick Bills, Transactions, Refund, and Reports. The main content area is titled 'New Scheduled Payment' and includes a 'RESET FORM' link. The form is divided into several sections: 'DESTINATION ACCOUNT' with a 'Choose an account' dropdown showing '*1234'; 'SCHEDULE INFORMATION' with fields for 'Client Email' (client@email.com), 'Schedule Description' (Monthly Payments), and 'Transaction Reference (Optional)'; 'Additional Data' with an 'Add' button; 'Tags' with 'Attorney' and 'Practice Area' buttons and a note about payment tags; and 'SCHEDULE DETAILS' with fields for 'Amount' (\$100.00), 'First Charge On' date (3/31/2022), 'Recurrence' (Monthly), and 'Frequency' (Every 1 month(s) on the last day of the month).

Figure 3: LawPay's Scheduled Payments feature allows you to maximize cash flow by guaranteeing your invoices get paid on time.

Scheduling Payments

Use the Schedule Payments option to set up recurring payments for a client to automate fee collection. The process is similar to scheduling a recurring meeting, identifying the starting and ending date, frequency, amount of each payment, and card information. Each time a payment is billed, both the client and the firm will receive an email. *See Figure 3 on the previous page.*

Security

LawPay has completed and exceeds Level 1 PCI Compliance, undergoes quarterly payment system scans, and has annual audits performed by a qualified security assessor. LawPay encrypts and tokenizes all sensitive information, such as card details, preventing exposure once a transaction is complete, and secures receipts, exposing only the last four digits of a card number. Finally, LawPay enforces

security-code confirmation every 30 days for merchant log-ins.

Pricing

LawPay Pro is priced per user and billed monthly or annually. Annual pricing is \$19 per month per user, and monthly pricing is \$29 per month per user. Companies can accept debit cards, credit cards, eCheck, and fee financing through LawPay. However, credit card transaction fees are not included in user fees and will vary by institution. Pay Later transactions have a 3.95% processing fee. Contact AffiniPay for more information regarding pricing on LawPay and LawPay Pro.

Who is AffiniPay?

AffiniPay is a professional services payment provider serving legal, accounting, architectural, engineering, and construction firms. AffiniPay has been recognized as one of Inc. 5000's fastest-growing companies for

ten years in a row. Each of its brands serves its respective market with solutions purpose-built by industry, including LawPay, ClientPay, CPACharge, and AffiniPay for Associations. More than 50,000 law firms trust LawPay's solution with over 150 strategic partnerships and endorsements, including the American Bar Association.

Why Buy LawPay?

- Manage client payment information easily in the Card Vault.
- Count on robust security of sensitive client financial information.
- Dashboards provide a concise overview of financial information.

Schedule a LawPay Demo Today!

[Schedule your demo today](#) to see how LawPay can help you improve managing payments!



TimeSolv Makes it Easy for Law Firms to Record Time, Bill Accurately, and Get Paid Online and On Time

“Immediately, you see all the time entries you entered in a monthly calendar view. The monthly calendar displays daily totals, with weekly totals on the right and the monthly total below. Optionally, a firm can set a threshold number of daily billable hours, and TimeSolv pinpoints the days a timekeeper did not meet the threshold in red.”

Company Name Brand
TimeSolv Corp

Product Name Brand(s)
TimeSolv Legal, TimeSolvPay, TimeSolv Websites, Law Ruler, LexShare

- Latest Developments and Updates**
- Administrative dashboards show critical financial performance for timekeepers and firms.
 - Integrates with Lexshare.io to share invoices with clients.
 - Consolidate matter or project invoices for clients.
 - Set granular, role-based system permissions.

Timekeeping is Everything
When logging in to TimeSolv Legal, the system assumes you want to record time and lands you on the Time Entry webpage. A horizontal navigation bar spans the page, allowing you to change the context to dashboards, clients, documents, invoices, payments, and more. *See Figure 1.*

Immediately, you see all the time entries you entered in a monthly calendar view. The monthly calendar displays daily totals, with weekly totals on the right and the monthly total below. Optionally, a firm can set a threshold number of daily billable hours, and TimeSolv pinpoints the days a timekeeper did not meet the threshold in red.

When entering time, the project field combines the client and matter name. Begin typing either name and then choose the appropriate project displayed in a drop-down menu. Firms can adjust the project label to another, such as matter, job, engagement, etc.

By default, the task code field applies the American Bar Association's Uniform Task-Based Management System (UTBMS). Still, you can add other code sets or remove the task code field from view if you don't use codes. Use codes to build budgets and limit timekeepers to specific tasks and rates to meet client and matter requirements.

Client - Project	Task Code	Hours	Rate	Total	Status
Denny Crane - Legal Services		2.200	300.00	\$660.00	Approved
Finn Jones - Contested Divorce		1.500	300.00	\$450.00	Approved
Marty McFly - Professional Services		1.700	300.00	\$510.00	Approved
Search Total		5.400		\$1,620.00	

Figure 1: Record time, start a timer, and monitor time records for matters or projects on TimeSolv's Time Entry landing page.

“TimeSolv creates invoices from unbilled time and expense records automatically. You can configure TimeSolv to regularly batch invoices, such as monthly or quarterly, or trigger them when you complete a project milestone or phase.”

Typically, all recorded time is billable, but firms can allow users to label records as non-billable or non-chargeable. TimeSolv rounds time records up to one-tenth of an hour, but firms can customize it to one-twenty-fifth or other increments. Overall, firms have up to seven options to set rates for matters.

Timekeepers have a default rate, which is modifiable based on the client or matter they're working on. Rates can change depending on the timekeeper, client, matter, and task code if used. Once the firm sets rates, timekeepers do not need to see the applicable rate when they enter time or start timers. They can trust the system to input the correct rate based on the context of the client, matter, and task code.

Firms can set up abbreviations to input standard notes into the description field, such as “tc”, which translates to “telephone call.” Users can click the document icon next to the description field to view the abbreviations. Firms can apply [read-only narratives to task code descriptions](#) to ensure timekeeper narratives do not conflict with task codes. You can use a Chrome extension to dictate descriptions in the web app. Dictation works best in TimeSolv's mobile apps, where you tap the microphone function to dictate.

Use Time and Triggers to Create Invoices

TimeSolv creates invoices from unbilled time and expense records automatically. You can configure TimeSolv to regularly batch

invoices, such as monthly or quarterly, or trigger them when you complete a project milestone or phase. The system includes light project and task management features but does not compete with enterprise project management software. Only those assigned a specific task can record time and bill against it. Others will not see it because TimeSolv supports granular, role-based system permissions.

You can search and filter all outstanding invoices by date range, clients, or other criteria to generate a subset of draft invoices. For example, send invoices to all clients for matters within a specified date range in a practice area. Apply advanced criteria to consolidate project invoices for clients and use split-billing techniques by client or matter using percentages and special discounts for one or more payers.

Preview and edit draft invoices before sending them and check all underlying time entries. You can change invoice narratives, edit text, and adjust, add, or remove entries in review. TimeSolv's system log captures and reports changes to invoices and time records. Download or print invoices for review and approval in single or multiple PDF files.

TimeSolv supports the Legal Electronic Data Exchange Standard (LEDES) 2000, 1998B, 1998BI, Chubbs, and Litigation Advisor electronic billing formats. You can set task codes in groups for clients requiring LEDES or other billing types and apply them to clients, matters, and timekeepers.

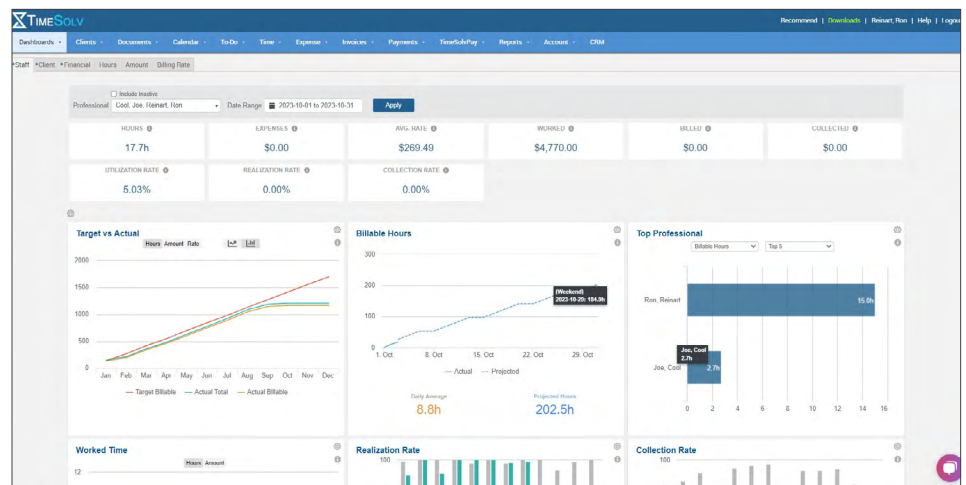


Figure 2: New TimeSolv dashboards show key performance indicators (KPIs) for staff, clients, and law firm financial data.

“TimeSolvPay allows you to send secure payment links or QR Codes to clients in emailed invoices. It offers firms next-day funding for clients who pay with credit or debit cards or use automatic check handling (ACH).”

Get Paid Online and On Time

TimeSolvPay allows you to send secure payment links or QR Codes to clients in emailed invoices. It offers firms next-day funding for clients who pay with credit or debit cards or use automatic check handling (ACH). Firms can get paid faster with TimeSolvPay without paying an additional monthly charge, only transaction fees. Optionally, you can add a surcharge cost where it is permissible to charge clients for the convenience of using a credit card.

Clients can maintain payment information in their accounts for firms to apply payments to outstanding invoices or on demand. The payment information is masked and secure from the staff, who only see a “credit card on file.” Clients can also pay invoices from retainers or trust accounts. TimeSolv supports multiple IOLTA (Interest on Lawyers’ Trust Accounts) accounts.

Firms can use bulk operations to pay invoices from credit cards on file or trust funds and approach near-zero accounts receivable or **Zero AR**. When a client’s trust account drops below a threshold, firms can automatically add an amount to the invoice to bring the account into good standing.

Dashboards

TimeSolv includes standard reports for staff time records, amounts billed and collected, average billing rates, and more. It also has dashboards for administrators to review staff, client, and firm financial information without running reports.

You can navigate to Dashboards and see a tabbed display of dashboards for staff, clients, hours, amounts billed, and billing rates. See *Figure 2 on the previous page*.

For staff, filter by one or more individuals and date ranges to drill into the data and view projected billable hours for the month based on time entered. You can easily view your top professionals’ billable hours, average billing rate, and when they worked for free. Other dashboards calculate utilization, realization, and collection rates, providing formulas for how TimeSolv arrived at the reported numbers.

Below the dashboards, you can see a list view of the data in columnar format by client and matter. The list view details data on billable, non-billable, no charge, and total hours with total profit, billed profit, gross margin, and more.

You can view the dashboards on-screen, and TimeSolv aims to make the data printable and downloadable within short development cycles.

Integrations

TimeSolv works in the Amazon Web Services (AWS) cloud, supports all web browsers, and makes apps to capture time and expense records on popular devices and software. It makes the **TimeSync Desktop Application** to track time on PCs and Macs and **TimeSolv Mobile** to track time on Android smartphones and Apple iPhones. With a Microsoft Outlook 365 add-in, you can configure task timers and

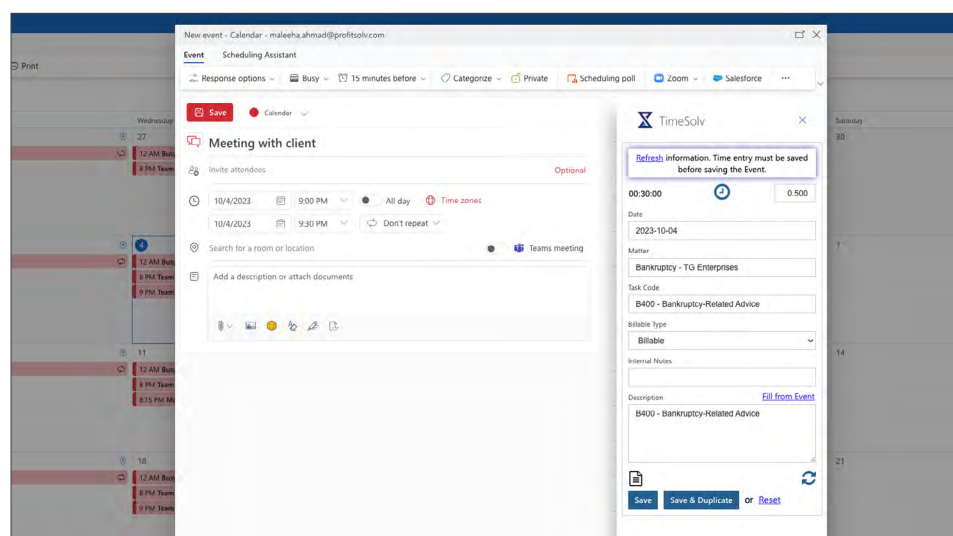


Figure 3: TimeSolv’s Microsoft Outlook add-in can create time entries for working in email and participating in calendar events.

start and stop them on demand. All apps work offline and synchronize records when they reconnect to the cloud. Smartphone and iPhone apps also align receipt photos with expense entries.

In Outlook, TimeSolv's add-in allows you to record time spent reading, writing, and sending emails in a flyout panel where you can further add a matter and task codes. The Outlook add-in can also create time slips from events. If an event is modified or does not occur, you must edit or delete the TimeSolv record, it won't happen automatically. *See Figure 3 on the previous page.*

TimeSolv integrates with other software provided by its parent company, ProfitSolv. When Law Ruler, a customer relationship management (CRM) software, acquires a client, you can click a button, and the new client details flow to TimeSolv. With LexShare, TimeSolv users can share files of any type or size, get documents electronically signed, and more. TimeSolv also integrates with Dropbox, Microsoft One Drive, and NetDocuments. Other integrations support QuickBooks Online, QuickBooks Desktop, Xero Accounting,

LawPay, and AccountEdge (formerly MYOB), small business accounting software.

Pricing

TimeSolv Legal starts at \$39.95 per user per month (paid annually) for 15 or more users—volume discounting applies. All accounts include unlimited clients and matters, unlimited document storage, TimeSolvPay, trust accounting for multiple trust accounts, LEDES billing, ABA activity and task codes, and conflicts management. Firms receive free and unlimited support, including online chat and access to TimeSolv's knowledge base.

For an additional cost, firms can use TimeSolv Websites for practice-specific web pages, intake forms, and TimeSolv Online Payment portals, and the company's Outsourced Legal Billing service to outsource their legal billing and invoicing.

Who is TimeSolv?

Since 1999, TimeSolv has provided web-based legal billing and timekeeping for lawyers and other professionals. Thomson Reuters created the software for its Elite E3 offering. TimeSolv's CEO, Raza Hasan, who worked for Thomson, spun the time and

billing software out as a private company in 2006. TimeSolv has more than 15,000 users today, most of whom are lawyers. In 2020, Lightyear Capital, a private equity firm, formed ProfitSolv to acquire TimeSolv and other legal software solutions, including Rocket Matter, CosmoLex, and Law Ruler.

Why Buy TimeSolv?

- Timekeepers can quickly review monthly time entries and totals and stay on track to maintain billable hour and rate realization requirements.
- Batch invoices from unbilled timesheets on demand or trigger their generation by date or when a project completes a milestone or terminates.
- Enable read-only timesheet narratives or descriptions that correlate with task codes.
- Integrate time and billing with other ProfitSolv software, including CRM, file-sharing, and e-signature.

Try TimeSolv Today!

Try TimeSolv Legal for free (no credit card required), including one-on-one training. Set up one account for the firm and add multiple users to increase billable time and reduce account receivables. ■

Practice Management Including Time and Billing



Everything Your Legal Team Needs
Through Every Stage of the Time &
Billing Cycle



Simplify Your Timesheets and Beautify
Your Billing with Lawmatics Time & Billing



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



Everything Your Legal Team Needs Through Every Stage of the Time & Billing Cycle

“Users can open up to ten customizable timers at any time. This feature enables easy movement between tasks, even if they are billed at different rates. The system ensures that only one timer runs at a time while keeping the others paused for easy access.”

Company Name Brand
Filevine

Product Name Brand(s)
Filevine

Latest Developments and Updates

- Filevine now includes a pre-bill workflow, including an invoice approver role and two invoice statuses between “Edit” and “Final.”
- Filevine now has end-to-end batch billing, including trust balance tracking inside a case, Filevine payment application, ad-hoc payments, and invoice target links.
- Trust account handling for digital payment, including charging merchant fees to an Operating account.
- Filevine’s environmental architecture is being updated. The new structure allows users to log in seamlessly and more securely and provides personalized URLs and project email addresses.
- Coming soon: Filevine is developing public website payment links that should be available by the end of November 2023.

Working Through the Billing Cycle with Filevine

Filevine is purposely designed to complement the process of how law firms work. Early on in Filevine’s development, firms were able to manage communications, such as internal notes, texts, calls, and emails, allowing entire legal teams to operate on the same page and avoid misunderstandings and confusion. Then Filevine introduced true project (case) management, giving legal teams a way to manage tasks and deadlines to represent clients effectively and efficiently. Next, Filevine expanded project management to include an integrated document management system embedded within the platform. Now, Filevine introduces a seamless practice management component that [delivers time & billing](#).

Matter Creation

When a firm opens a matter, whether directly or via Filevine’s Lead Management module, client information is collected,

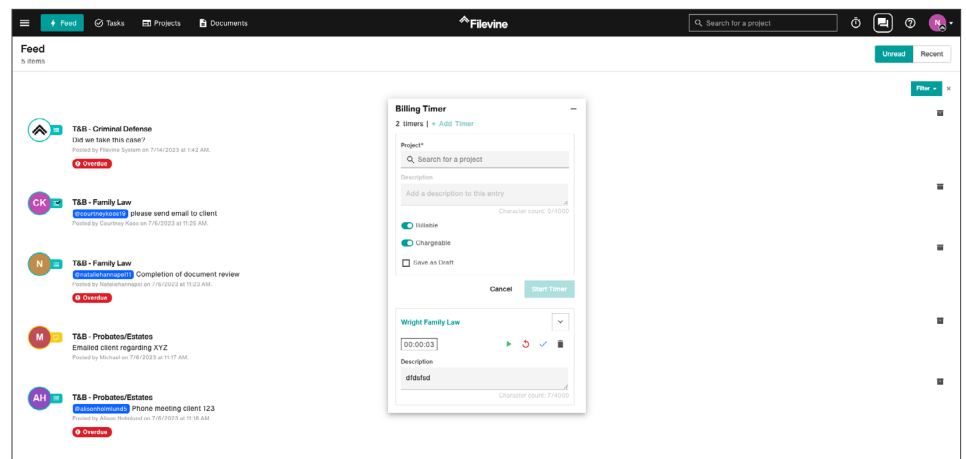


Figure 1: While creating a timer, a user can select the project and write a description of the work being done. Timers can be edited to include billing codes to categorize the work based on the type of tasks being performed.

“All time entries created are added to the invoice, and an email containing pre-bill invoices is sent to the billing attorney to review the draft or pre-bill. An invoice can be generated individually, or the firm can handle all clients’ invoices in bulk.”

engagement letters are sent, and retainers are received. Filevine provides a simple workflow to accomplish these tasks. Creating a matter directly in Filevine is a straightforward process of entering client data, including essential contact information and the appropriate practice area. For example, a new client contacts a firm for estate planning; the firm creates a matter and emails an engagement letter. The client can click a link in the email to [sign the agreement via Vinesign](#) electronically. The client then receives a link via email requesting a retainer, which they can effortlessly click to pay. Filevine fully supports the management of trust accounts for retainers, and the firm can track all money that comes in from the client and to which account it gets applied.

Getting Work Done

Once the retainer has been paid, the firm can begin work on the case, in this example. Filevine provides case and document management, allowing users to leverage automation, such as document assembly, built into each practice area, driving efficiency in creating documents such as trusts and wills.

Users can open up to ten customizable timers at any time. This feature enables easy movement between tasks, even if they are billed at different rates. *See Figure 1 on the previous page.*

The system ensures that only one timer runs at a time while keeping the others

paused for easy access. Once work is done for the day, users can finalize timers to create time entries that appear on the client’s invoice. Team members can review and modify their time entries before the end of the billing cycle as needed. *See Figure 2.*

The timesheet provides valuable information to assist in managing work for the client as well as billable hours for the day, week, and month.

Generate Invoices

Once a billing cycle has ended, the client will receive an invoice. All time entries created are added to the invoice, and an email containing pre-bill invoices is sent to the billing attorney to review the draft or pre-bill. An invoice can be generated individually, or the firm can handle all clients’ invoices in bulk. Firms have the ability to customize what appears on invoices fully and can use specific billing codes, such as LEDES, or a customized code list tailored to a particular client or practice area. Clients can request these codes to be present on their bills to make note of them in their accounting system. The streamlined process allows the firm to create one or many invoices by selecting the client(s), all unbilled time, and creating an invoice. Each invoice is generated based on the settings for a client. *See Figure 3 on the next page.*

Getting Paid

A key component of Filevine is simplifying and creating efficient invoices to help firms

Feed

Tasks

Projects

Documents

Filevine

000000

Search for a project

Timesheet

M
Jun 19
0 hours

Tu
Jun 20
0 hours

W
Jun 21
0 hours

Th
Jun 22
0.0

F
Jun 23
0.0

Sa
Jun 24
0.0

Su
Jun 25
0.0

Week Total
Jun 19 - Jun 25
0 hours

Month Total
Jun 2023
0 hours

Last updated: 1:40:05 PM Today [Refresh](#)

Entries

⌵

Time & Billing

▼

0 row(s) selected

Edit

Close

Delete

Add New Item

<input type="checkbox"/>	Status	Project	Description	TimeCode	TimeCode2	Team Member	Date	Rate	Hours	€	Total	Billable	Chargeable
<input type="checkbox"/>	[Select]	T&B - Criminal Defense	Deposition Prep			<div>Nellessig @nellessig1</div>	Jul 06 2023	300	2	600.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Finalized]	T&B - Criminal Defense	Preparing for Deposition			<div>Nellessig @nellessig1</div>	Jun 28 2023	300	2	600.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Unbilled]	T&B - Criminal Defense	Research			<div>Nellessig @nellessig1</div>	Jun 24 2023	300	2	600.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Finalized]	T&B - Criminal Defense	Preparing for Deposition			<div>Nellessig @nellessig1</div>	Jun 20 2023	300	1.2	360.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

50

▼

1 to 4 of 4 (71)

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Figure 2: View all billable hours for a user for a day, week, and month along the top of the timesheet. Information about each time entry is available, such as the status, project, description of the work done, billing rates, number of hours, and billable amount.

“ Reports can also evaluate staff and attorney performance, measure referral sources and marketing success, and create a report for every payment made against an invoice to allocate that payment to the timekeepers on an invoice proportionally.”

get paid faster. After an invoice has gone through the approval process, it can be emailed to the client. Similar to the retainer payment process, a link to the attached invoice is embedded in the email. The bill will be drawn from the trust account if a retainer is on file. After clicking on the link, the client is directed to a payment page to select the method of payment and related information, enter the amount to pay, and complete the transaction. Filevine facilitates several payment methods, including debit cards, ACH, Google Pay, and Apple Pay. If a balance is owed, the client clicks the link, enters their information, and submits payment. The amount will be posted, and the invoice will be marked as paid.

Reporting

Firms can generate reports on any data point in the system using [Filevine's Periscope](#) and fusion reporting features. These reports can track trends in billable hours, identify clients overdue on payments, provide insights into overall billing performance, determine how long cases are taking and where bottlenecks occur, and analyze costs and settlement amounts over time based on practice area or team member. Reports can also evaluate staff and attorney performance, measure referral sources and marketing success, and create a report for every payment made against an invoice to allocate that payment to the timekeepers on an invoice proportionally. At the end of

your billing cycle, you can use this information to calculate commissions or compensation for timekeepers.

Integrations

In addition to tight integration with Microsoft Office, Filevine offers an open API and works well with other applications, allowing users to customize Filevine as a single location for daily tasks. The most common integrations include QuickBooks, 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. Protective measures include audits, penetration testing, privacy and vulnerability assessments, security training and certifications, backups, and disaster recovery/business continuity and incident response planning.

Pricing

Filevine licenses include timekeeping, billing, and payment, as well as cloud-based case management, task management, automated workflows, and calendaring. They also include team collaboration tools, unlimited document storage, contact management, guest access, instant communication via email or text, a custom report builder, scheduled reports, enterprise-level security, and powerful integrations. Additional modules

Project	Time	Expenses	Post Fees	Total
T&B - Bankruptcy	480.00 \$	0.00 \$	0.00 \$	480.00
T&B - Criminal Defense	2,800.00 \$	0.00 \$	0.00 \$	2,800.00
T&B - Family Law	225.00 \$	0.00 \$	0.00 \$	225.00
T&B - Probates/Estates	375.00 \$	0.00 \$	0.00 \$	375.00
Trevor McGuire vs Honeyville HOA	300.00 \$	0.00 \$	0.00 \$	300.00

1 to 5 of 5

Figure 3: The Time & Billing screen presents all matters with unbilled time by matter, displaying the value of the unbilled time, any outstanding expenses, and the total amount to be billed. Users can select individual or all matters and generate invoices.

are available for an additional fee. Contact Filevine for more information and [pricing](#).

Funds processed through Filevine
Payments will incur competitive transactional charges within the industry.

Who is Filevine?

Filevine is a legal work platform changing the way legal work gets done for law practitioners and their clients. It offers a wide range of features, including document management, client communication, legal drafting, and

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

Why Buy Filevine?

- Filevine provides one place to work for clients, from case/matter creation to invoice and payment.

- Filevine empowers clients to customize their platform to meet their firm's unique needs.
- Collaborative capabilities save firms time and money.
- Tight integration with MS Office provides a seamless experience.

Find Out More!

Contact Filevine about how they help streamline cases, from creation to invoicing. [Schedule a demo](#) or head to the website for extensive resources, including podcasts, blogs, white papers, and more.



Simplify Your Timesheets and Beautify Your Billing with Lawmatics Time & Billing

Easy Billing for Easy Intake

Lawmatics time & billing features allow you to automate each step of your billing process and then deliver professional, precise invoices that accurately reflect your billable time. In one click, you can create clean, granular invoices that make it easy for clients to understand precisely what they owe and why, incentivizing them to pay faster, and in full.

Clients can also settle invoices effortlessly with Lawmatics. Our dedicated payment processor – LMPay – simplifies the process of making secure online payments thereby eliminating any and all billing hurdles from invoice sent all the way through to payment collection. Used in tandem with our scheduling and event management features, Lawmatics users can accept payment for paid consultation self-service booking, thereby creating a seamless intake experience for clients.

The end result? A streamlined workflow, increased collection rates, and firmwide efficiency. Lawmatics time & billing means you can focus on what matters most — your clients.

For more information, please visit lawmatics.com

Company Name

Lawmatics

Find us on [Linkedin](#)



About



As an all-in-one CRM platform, Lawmatics can automate the most robust suite of client engagement tools, from marketing automation, client intake, time & billing, email and event management, document assembly, time & billing, and more. No matter the practice area or size of firm, Lawmatics enables law firms to streamline their operations, impress clients, win more business, and get paid. Our legal software integrations allow you to automate the repetitive tasks between apps and make sure nothing slips through the cracks.

Company History

Lawmatics was founded in 2017 by attorney Matt Spiegel and software engineer Roey Chasman. Having previously founded a leading case management software, Matt developed a revolutionary vision of the client intake process, driven by automation. Law firms have too many tasks to complete in too little time. Automating with Lawmatics lets law firms save time and win more business. Based in La Jolla, California, Lawmatics was named Product of the Year in the 2023 Sales and Marketing Technology Awards by Business Intelligence Group, and has repeatedly been recognized as a High Performer and Momentum Leader in G2's quarterly reports.

The screenshot displays the Lawmatics interface for managing client information and billing. On the left, a sidebar shows the client profile for George Costanza (Main POC), including address, contact info, and invoice settings. The main area is divided into sections for Time Entries, Available Time Entries, Expenses, and Adjustments. The Time Entries section shows a list of activities with columns for Activity Type, Date, Description, Duration, Rate, Amount, Staff, NB, and Del. The Available Time Entries section shows a list of activities with columns for Activity Type, Date, Description, Duration, Rate, Amount, Staff, NB, and Add. The Expenses section shows a table with columns for Expense Type, Date, Description, Quantity, Cost, Amount, Staff, NB, and Del. The Adjustments section shows a table with columns for Category, Applied To, Type, Description, Value, Basis, and Subtotal. At the bottom right, a summary table shows Sub-total: \$10.00, Adjustments: \$83.00, and Total: \$93.00.

ACTIVITY TYPE	DATE	DESCRIPTION	DURATION	RATE	AMOUNT	STAFF	NB	DEL
Phone Call	01/12/2023 3:13pm PST	Needed to gather more info	0.1h	\$100.00/h	\$10.00	Eric Nalson		

ACTIVITY TYPE	DATE	DESCRIPTION	DURATION	RATE	AMOUNT	STAFF	NB	ADD
Consultation Fee	02/08/2023 5:10pm PST	Consultation for the month of January (2...	2.5h	\$150.00 /h	\$150.00	Saul Goodman, Esq.		+
Client Meeting	02/08/2023 4:40pm PST	Discussion around recent developments.	2.0h	\$500.00/h	\$1,000.00	Saul Goodman, Esq.		+

EXPENSE TYPE	DATE	DESCRIPTION	QUANTITY	COST	AMOUNT	STAFF	NB	DEL
No data to display								

CATEGORY	APPLIED TO	TYPE	DESCRIPTION	VALUE	BASIS	SUBTOTAL
Tax	Sub-total	(%) Percentage		8.3%	\$1,000.00	\$83.00

	Sub-total:	Adjustments:	Total:
	\$10.00	\$83.00	\$93.00

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

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

Company Name Brand
Paradigm

Product Name Brand(s)
PracticePanther

Latest Developments and Updates

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

Stay on Top of Your Practice

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

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

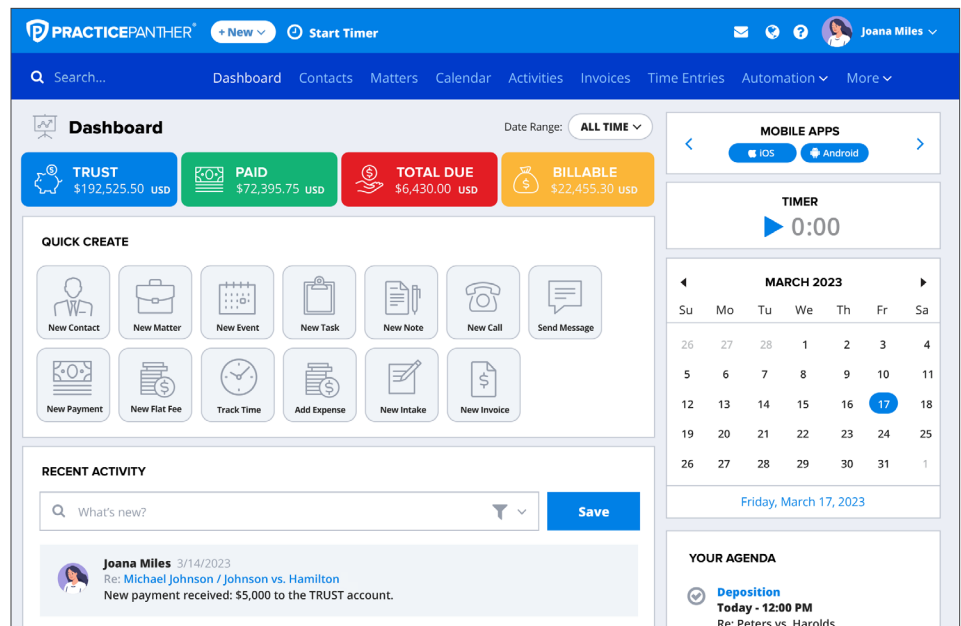


Figure 1: Every page view in PracticePanther sports a navigation bar with a global search function, a New button, and drop-down menu functions for matters, contacts, calendars, time entries, billing, payments, activities, documents, and reports.

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

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

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

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

When you first log in to PracticePanther, the dashboard displays the law firm’s financial details for trusts, paid invoices, due invoices, and billable records in your pipeline. If you are working in a public space, use the privacy button in the upper right-hand corner of the user interface (UI) to hide the financials.

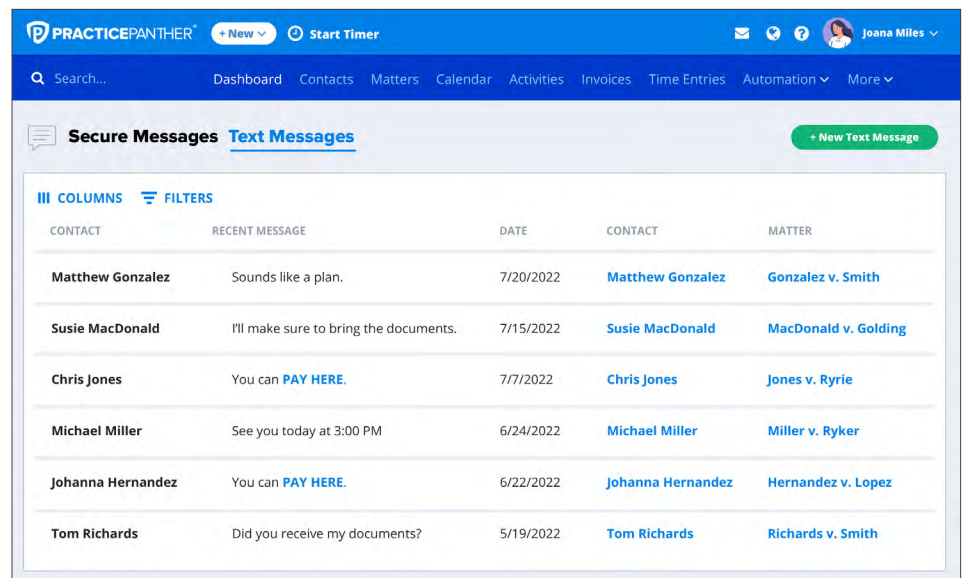
Case Management

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

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

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

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



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

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

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

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

Business Text Messaging and Internal Communications

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

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

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

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

Custom Document Templates

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

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

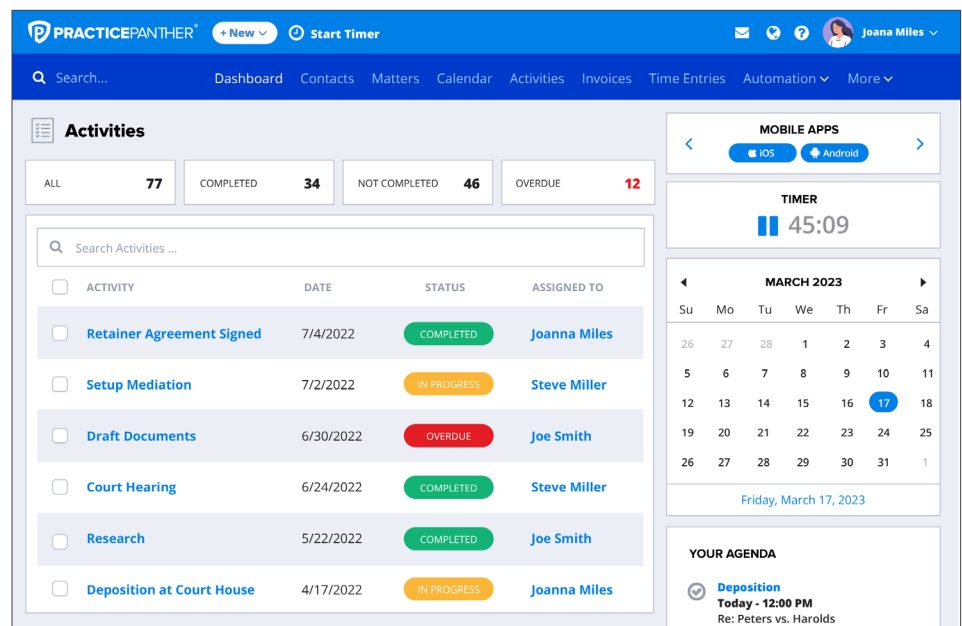


Figure 3: PracticePanther activities report shows completed tasks and time logged. Without leaving the report, you can capture unreported time for billing and make sure nothing slips through the cracks.

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

Time, Billing, Accounting and PantherPayments

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

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

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

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

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

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

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

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

Reports

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

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

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

Pricing

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

Who is PracticePanther?

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

Why Buy PracticePanther?

- PracticePanther is an all-in-one software with an intuitive, user-friendly interface to manage complex matters.
- Built-in, low-cost payment processing service through PantherPayments.
- Send unlimited documents to clients and third parties for electronic signatures.
- Send and receive SMS/texts to and from clients using a web browser or mobile app.
- Create custom OneLinks for clients to pay bills with a few mouse clicks.

Try Practice Panther Today!

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

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