



# COMPREHENSIVE BUYER'S GUIDE 2026

FEBRUARY EDITION

# Comprehensive Buyer's Guide

## February 2026 Edition

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LTP produces an extensive library of expert reviews published in our Buyer's Guides Series to assist lawyers, in-house counsel and legal professionals through the process of selecting the right technology for the needs of their clients and the efficiency of their business.

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# A New Chapter for LegalTech Publishing

By: Jennie Azoulai, Esq., Managing Director



Dear Valued Readers,

I am thrilled to introduce myself as the new Managing Director of the LegalTech Publishing. My name is Jennie Azoulai, Esq., and it is an honor to take the reins from the illustrious Cathy Kenton, whose visionary leadership has set a remarkable standard for excellence in the legal technology space.

Our exceptional team—comprised of dedicated writers, creative graphic designers, detail-oriented project managers, and skilled editors—remains steadfast in their commitment to delivering the industry's most comprehensive and insightful Legal Tech Buyer's Guides.

Looking ahead, we are excited to announce new opportunities for vendors to showcase their products and services in this and future guides. Through these expanded offerings and our collaboration with Above The Law, we aim to provide unparalleled amplification opportunities that help vendors connect with their target audience.

We're also delighted that Cathy Kenton will continue to lend her expertise as a member of LegalTech Publishing's Advisory Board, ensuring her invaluable insights remain part of our journey.

As we embark on this next chapter, my goal is to build on Cathy's legacy by delivering cutting-edge insights, practical advice, and robust resources to empower your legal technology decisions. Thank you for your continued trust and partnership as LegalTech Publishing continues to serve as a trusted source in navigating the ever-evolving legal technology space.

Sincerely,

**Jennie Azoulai, Esq.**  
Managing Director  
LegalTech Publishing

# Artificial Intelligence



CoCounsel Drafting: An AI-Powered  
Game Changer for Legal Professionals



Your Legal Tech Stack  
Super-Charged by AI

# Microsoft: The Bogeyman in the Room: Mastering the EU AI Act and International Regulations

By: Manny Sahota, JD/LLB, MBA, LLM (C)  
Director of Global Regulatory Strategy  
Microsoft Corporation



Manny emphasized Microsoft's deep commitment to complying with all applicable regulations globally, including the EU AI Act. "It's exciting to see how our technologies—particularly through our shared responsibility model—support customers in being cyber-resilient and AI-ready," he noted. Manny highlighted how Microsoft invests in deep-dive compliance commitments—found in the [Microsoft Trust Center](#), and new content around the EU AI Act—to help customers see exactly what Microsoft does to secure the underlying cloud infrastructure and what customers need to do to meet their obligations.

**In a world where Artificial Intelligence (AI) shapes everything from personalized recommendations to critical infrastructure, compliance with expanding regulations can feel like the “bogeyman” lurking in every boardroom. This sentiment is especially true as the EU AI Act, alongside regulations like GDPR, NIS2, DORA, and CCPA/CPRA, continues to redefine the global compliance landscape.**

## **Why AI compliance is a strategic necessity**

The evolving regulatory frameworks surrounding artificial intelligence (AI) are poised to reshape how organizations approach compliance and governance. The European Union's AI Act represents a pioneering stride in AI oversight, establishing the first-of-its-kind regulatory framework specifically designed for AI technologies. This landmark legislation is expected to set a global precedent for AI governance, influencing regulatory approaches beyond the borders of Europe.

Much like the far-reaching impact of the General Data Protection Regulation (GDPR), the influence of the EU AI Act is anticipated to extend worldwide. Governments across the globe may look to this framework as a model for their own AI regulations.

As a result, organizations operating internationally—or even those with indirect exposure to European markets—may find themselves needing to adapt to new compliance requirements, regardless of their geographic location.

The stakes for noncompliance with emerging AI regulations are notably high. Financial penalties, regulatory investigations, and reputational damage can swiftly erode an organization's goodwill. The risks are not limited to deliberate misconduct; inadvertent violations pose significant challenges as well. For example, AI systems can give rise to unforeseen issues such as algorithmic collusion, which many organizations are currently ill-equipped to address.

Despite these challenges, robust compliance with AI regulations offers tangible business benefits. Organizations that demonstrate alignment with stringent regulatory standards can achieve competitive differentiation, bolstering customer trust and enhancing their brand reputation. Furthermore, cultivating a strong compliance posture often leads to improved data governance practices and greater operational efficiency, as businesses streamline processes to meet regulatory requirements. In this way, proactive engagement with evolving AI regulations can serve not only as a risk management strategy but also as a catalyst for operational excellence.

## Microsoft Compliance Commitments

Microsoft fully recognizes that delivering secure, trusted cloud services involves an ongoing commitment to complying with global regulations—from EU data privacy laws to the latest AI-focused frameworks. To that end, we provide transparent documentation, detailing how Microsoft implements security controls in Azure, Microsoft 365, and other solutions. And, with constant evolution, as new laws or

guidance surface, Microsoft adapts its compliance frameworks, ensuring our customers have up-to-date resources. Learn more about Microsoft's position on the EU AI Act and our in-depth compliance commitments at the [Microsoft Trust Center](#).

## Microsoft's Shared Responsibility with Microsoft Purview

At the heart of our security and compliance offerings is Microsoft Purview, which operates under a shared responsibility model:

### Microsoft's Role

- Provide a secure, compliant-ready cloud platform.
- Continuously enhance services to align with global standards (e.g., ISO, SOC, GDPR).
- Offer tools like Purview Compliance Manager and eDiscovery to streamline assessments.

### Customer's Role

- Configure the tools correctly (e.g., enabling advanced threat protection and data loss prevention).
- Establish organizational policies and governance structures that align with specific regulatory requirements.
- Educate teams about how to properly handle data, especially when deploying AI solutions that process personal or sensitive information.

By leveraging Purview within this shared responsibility model, businesses can more effectively automate compliance, monitor data flow, and stay informed about changes in regulations.

## Practical Guidance for the AI-Heavy Future

A holistic compliance strategy is fundamental for organizations leveraging AI technologies. This strategy should be cross-functional, involving

the establishment of a dedicated AI governance committee. This committee must include representatives from IT, legal, compliance, and business leadership to ensure diverse perspectives and comprehensive oversight. Additionally, organizations should adopt a risk-based approach, identifying AI use cases that pose the highest compliance risks and allocating resources strategically to mitigate these risks effectively.

Investing in security and resilience is another critical pillar. Organizations need to implement robust data classification and discovery processes to maintain a clear understanding of the data their AI systems utilize, especially when dealing with sensitive information. Furthermore, incident response planning must be thorough and coordinated, involving legal and technical teams to develop clear communication protocols for managing breaches or responding to regulatory inquiries promptly and efficiently.

Ethical AI design is essential to foster trust and fairness. Continuous bias detection and mitigation are necessary to prevent unfair discrimination, particularly in sensitive sectors such as lending, hiring, and insurance. Equally important is ensuring explainability and transparency in AI systems. Organizations should meticulously document how these systems make decisions, with special attention to “high-risk” applications as outlined under the EU AI Act.

Staying agile with evolving laws is crucial in the dynamic regulatory landscape. Organizations must actively monitor regulatory updates, such as developments related to the EU AI Act, including enforcement timelines and new guidance documents. Leveraging vendor expertise can also be highly beneficial. Major cloud providers, like Microsoft, offer valuable compliance and security resources that can help accelerate an organization’s readiness and adaptability to regulatory changes.

## Turning the Bogeyman into a Catalyst for Growth

While AI regulations can appear like an insurmountable “bogeyman,” they also provide clear pathways for building resilient, ethical, and customer-trusted businesses. By adopting a holistic compliance framework, investing in automation and risk mitigation, and working in tandem with trusted partners like Microsoft, organizations can harness AI’s potential responsibly—and confidently.

## Next Steps and Resources

### Microsoft Trust Center

Deep Dive on Microsoft’s compliance commitments and best practices for secure cloud adoption. Learn more about the EU AI Act and Microsoft’s customer commitments on our [Microsoft Trust Center](#) page.

### Purview Compliance Manager

For real-time oversight of your [compliance posture](#) across Azure, Microsoft 365, and hybrid environments.

### Blog and updates from Natasha Crompton, Chief Responsible AI Officer

[Stay informed](#) on Microsoft’s stance regarding responsible AI.

### Compliance Program for Microsoft Cloud (CPMC)

Delivers guidance, best practices, and sector-specific roadmaps for aligning with [AI and data protection laws](#).

# CoCounsel Drafting: An AI-Powered Game Changer for Legal Professionals

“CoCounsel isn’t just about finding, it’s about creating. CoCounsel assists the user step by step when drafting a new clause, providing direct requests for quick first drafts of the clauses needed or modifying existing clauses with precision using CoCounsel’s AI assistance. CoCounsel Drafting’s chat-based interface feels like having a legal research assistant right in a Word document.”

**Company Name Brand**  
Thomson Reuters

**Product Name Brand(s)**  
CoCounsel, CoCounsel Drafting

**Latest Developments and Upcoming Updates**

- Single point of access to CoCounsel artificial intelligence (AI) skills from MS Word, including Draft Correspondence, Contract Policy Compliance, Extract Contract Data, Timelines, Westlaw AI-Assisted Research, and Ask Practical Law AI.
- Create and respond to numerous discovery requests powered by Gen AI, including interrogatories, requests for documents, and requests for admissions. Access a database of exemplar responses to draft responses and objections as a receiving party.
- Accelerate the review and negotiation process by creating customized playbooks for agreements with preferred

language, negotiation guidance, and escalation information.

- Launch of CoCounsel Drafting UK soon: Features for UK version will include the same/similar features as the US launch.

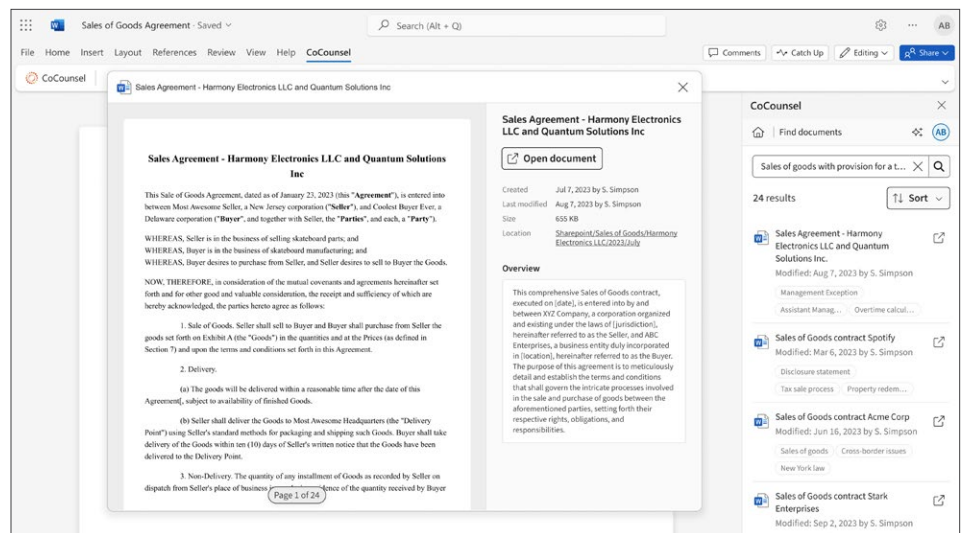
**Leverage AI for Drafting Documents**

CoCounsel Drafting is an AI-powered legal drafting tool that promises to **revolutionize the way legal professionals create contracts and agreements.**

Lawyers can spend hours just trying to find the right document to be the model for a new document they need to draft, and CoCounsel Drafting can save the day. Rather than reinventing the wheel or spending hours searching for prior work, users can utilize the generative AI assistant for the document they need to create, and the results are served up and ready for refinement, review, and finalization.

**Find**

Find the best starting point by searching across the firm’s repositories (SharePoint



**Figure 1:** CoCounsel Drafting allows users to search within MS Word for past work to find a good starting point to create new documents.

“Once the document is assembled, it’s time to analyze and revise. CoCounsel Drafting helps check for common drafting errors. It’s like having an eagle-eyed proofreader who won’t judge for excessive semicolons or misplaced “whereases.” The user can correct any slip-ups to ensure consistency and accuracy.”

and OneDrive, additional integrations with NetDocuments, iManage, and HighQ coming soon), or utilize Contract Express or Practical Law Dynamic subscriptions to find templates directly from within Microsoft Word. *See Figure 1 on the previous page.*

There is no need to waste time navigating folders—simply type a query, and CoCounsel will help locate past work relevant to a user’s current **drafting needs**. CoCounsel’s AI-generated metadata tags and document summaries ensure accurate search results. CoCounsel Drafting provides lawyers with a resource that goes above and beyond their in-house repository.

Firms using CoCounsel Drafting will have access to Practical Law Playbooks, curated sets of legal guidance, preferred language, and negotiation strategies, which serve as reference guides for legal professionals during drafting and negotiation. Playbooks include standardized clauses, fallback positions, and best practices. Users can leverage existing Practical Law Playbooks or create custom playbooks tailored to their specific needs. Playbooks ensure consistency across contractual documents,

streamline the drafting process, and align with professional guidance. CoCounsel provides access to Practical Law’s standard document model agreements and automated document templates so lawyers can avoid the risks and costs associated with manual drafting. CoCounsel pulls relevant language from trusted sources. *See Figure 2 on the next page.*

When a lawyer searches for a relevant document or clause, the results will identify whether the document or clause is from the firm repository or Practical Law. Searches are done without ever leaving the draft, **driving efficiency and cost savings for the client.**

#### Refine

Users can search for gold-standard and market-specific clause language. Use Practical Law Clause Finder from the Refine menu to streamline the drafting process by locating specific clause types, searching Practical Law, internal documents, and even SEC filings.

CoCounsel isn’t just about finding, it’s about creating. CoCounsel assists the user



VICTORINOX

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Learn more at [moxie.promo/victorinox-spectra](https://moxie.promo/victorinox-spectra)

step by step when drafting a new clause, providing direct requests for quick first drafts of the clauses needed or modifying existing clauses with precision using CoCounsel's AI assistance. CoCounsel Drafting's chat-based interface feels like having a legal research assistant right in a Word document. It suggests language, clarifies complex terms, and will summarize lengthy terms.

## Review

CoCounsel helps users comprehend how a redlined document deviates from the standard. It maps these changes against a playbook (such as Practical Law's contract playbooks). By flagging risks and identifying missing language, CoCounsel ensures thorough review and compliance. When a clause needs modification, CoCounsel provides intelligent suggestions.

It recommends replacement language based on context and legal best practices. CoCounsel's AI analyzes the document for potential risks. It also identifies any crucial language that might be absent. The review phase with CoCounsel is efficient and precise. Whether a lawyer is negotiating contracts, analyzing agreements, or preparing for litigation, CoCounsel accelerates the process.

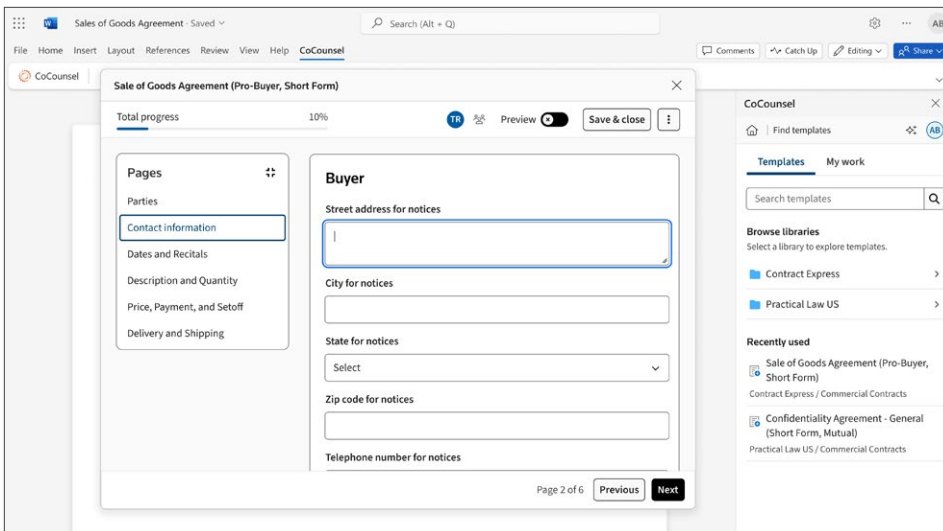
## Finalize

Once the document is assembled, it's time to analyze and revise. **CoCounsel Drafting** helps check for common drafting errors. It's like having an eagle-eyed proofreader who won't judge for excessive semicolons or misplaced "whereases." The user can correct any slip-ups to ensure consistency and accuracy. *See Figure 3.*

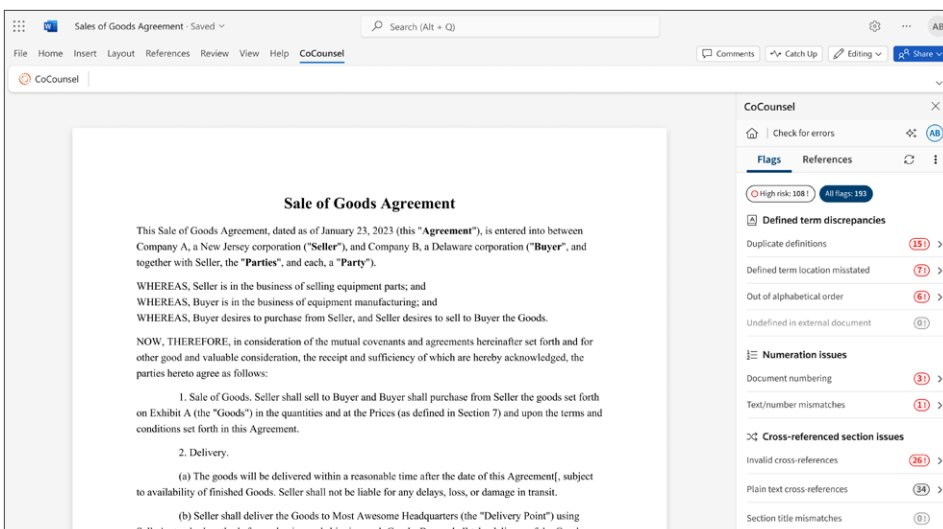
CoCounsel enhances productivity, increases accuracy and consistency, and adapts to how the legal team works. Big firms will streamline the associate's workload, general counsels will be thrilled with the efficiency, and solo firms will find they have a secret virtual assistant.

## Integrations and Security

CoCounsel Drafting operates directly within Microsoft Word. Legal professionals can draft, review, and refine documents—all without leaving the familiar Word environment. CoCounsel collaborates with Practical Law's content. CoCounsel, when responding to a natural-language query, summarizes relevant information grounded in Practical Law's expertly curated content. This integration accelerates moving from legal questions to actionable work product. For thorough



**Figure 2:** CoCounsel provides access to Contract Express and Practical Law templates. Users simply type a query or look at recently used templates and make a selection. Once a template is selected, the user is prompted to enter information, and then they can generate the document and begin the refinement process.



**Figure 3:** CoCounsel Drafting identifies common drafting issues, discrepancies, and other issues that would take an attorney hours to find.

research, CoCounsel enhances Westlaw Precision. It helps lawyers find relevant answers faster and more confidently, streamlining legal research. CoCounsel is evolving and continuing to find ways to assist legal teams. To that end, Microsoft 365, database management solutions, and tools like Microsoft Word, Outlook, and SharePoint are already in beta integration. Thomson Reuters is actively working on expanding CoCounsel's capabilities. Watch for future integrations for risk and fraud professionals (CoCounsel Fraud Detection and CoCounsel Investigators).

CoCounsel accesses the underlying AI model (GPT-4) through dedicated, private servers, which means no OpenAI employees can see customer queries or documents, and confidentiality is safeguarded. CoCounsel uses an "eyes off" API, meaning no human reviewers have direct access to customer interactions to protect data. All data, whether in transit or at rest, is encrypted. CoCounsel operates under Thomson Reuters' robust security practices. These policies align with industry standards and protect against unauthorized access.

### Pricing

Thomson Reuters offers a variety of subscriptions and licensing options for CoCounsel Drafting and other generative AI solutions. Contact them today for specific details.

### Who is Thomson Reuters?

Thomson Reuters is a Canadian American multinational information conglomerate that has played a pivotal role in shaping the professional landscape across various domains. Thomson Reuters enables legal, tax, accounting, compliance, government, and media professionals by fusing reliable content with state-of-the-art technology. Their mission is to provide the right information for informed decision making. Founded in Toronto, Ontario, Canada, Thomson Reuters has a rich history spanning over 150 years. Thomson Reuters is at the forefront of AI and technology adoption. Notable offerings include CoCounsel, a generative AI assistant for legal professionals, and Ask Practical Law AI, which provides summarized answers based on Practical Law's expertly curated content. The company is committed to

advancing justice, truth, and transparency. In summary, Thomson Reuters clarifies today's complex landscape, equipping professionals with the confidence to navigate tomorrow's challenges.

### Why Buy CoCounsel Drafting?

- A comprehensive solution where lawyers prepare documents today. It uses Microsoft Word, one of the best early adopters of generative AI in its class, and legal experts to train its users.
- Easy integration with dependable information and resources from Contract Express, Westlaw, and Practical Law.
- Retrieval-augmented generation (RAG)-based creative AI that leverages reliable Practical Law content.
- Make use of both internal and external resources to ensure the best quality assurance.
- Thomson Reuters provides [comprehensive training](#) and white papers to support users.

### Learn More and Save Time Drafting!

Reach out to the CoCounsel Drafting team to take it for a spin and [learn how AI can help you create new documents](#).



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The Architecture Urban2 is the perfect companion for the modern commuter. Our business bag collection fuses style and structure, offering an intelligent solution for everyday travel.

Featuring 360° protection for electronic devices, a SILVADUR™ antimicrobial lining, and maximized packing space – inside and out.

And, of course, we can customize your bags with your logo or name.



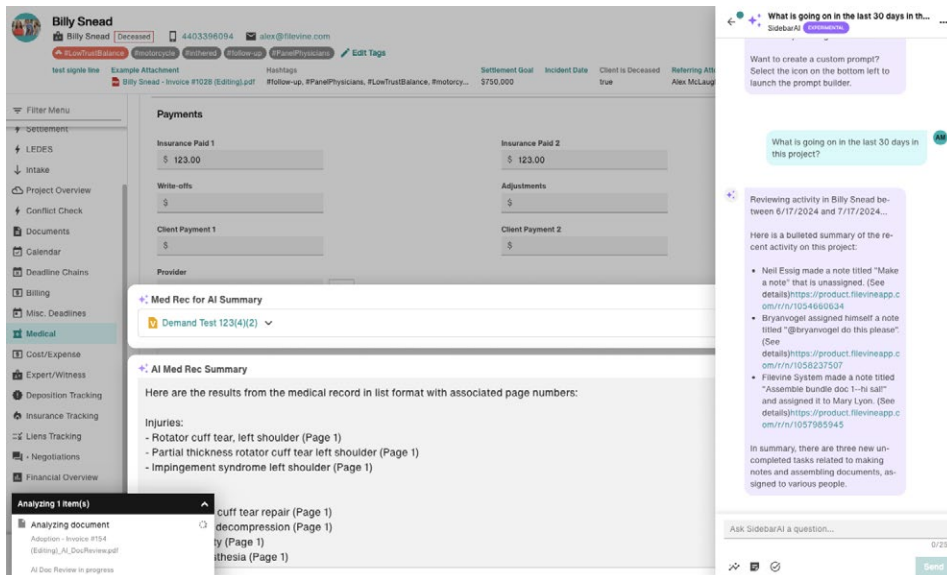


# Filevine: Your Legal Tech Stack Super-Charged by AI

## Unlock the Potential of AI for Your Legal Team

Filevine is more than just legal case management software; it's your complete legal tech stack, supercharged by AI. Streamline your entire legal workflow from client intake to billing with a single, unified platform. Reduce redundant tasks, draft documents with all your case data, and connect your workflow with all your contacts and documents. Customize everything to your team's legal needs. Filevine's AI-powered features automate routine tasks, extract key information from documents, and provide valuable insights to enhance your practice. Experience the future of law today.

For more information, please visit [www.filevine.com](http://www.filevine.com)



Company Name  
Filevine

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## About

Filevine is the leading legal operating system empowering law firms and legal teams to deliver excellence. As an all-in-one platform, Filevine offers a comprehensive suite of AI-powered solutions, including lead intake, case management, document assembly, e-signature, timekeeping, billing, payments, and business analytics. With a focus on streamlining complex legal work, Filevine helps legal professionals increase efficiency, improve collaboration, and enhance client satisfaction.



## Company History

Founded with a vision to revolutionize the way legal work gets done, Filevine has rapidly grown into a leading legal technology provider. Since its inception, Filevine has been dedicated to developing innovative solutions that address the evolving needs of law firms. With a strong focus on user experience and cutting-edge technology, Filevine has empowered thousands of legal professionals to streamline their workflows and achieve better outcomes.

# Client Relationship Management



The Legal CRM Redefining the  
Attorney-Client Relationship



# 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.

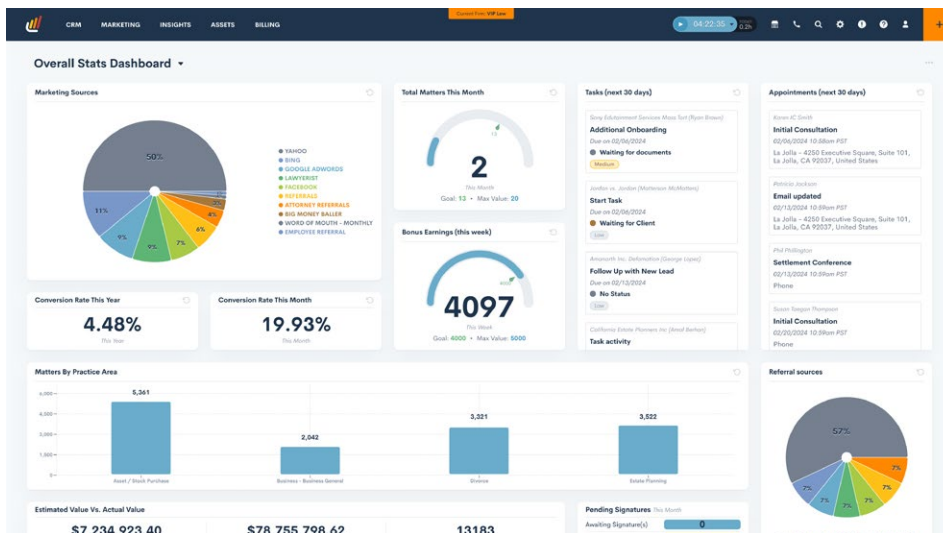
- Our pipeline workflow system eliminates inefficiencies in the follow-up process by means of automations, email and SMS templates, custom forms, calendar integrations, and customizable tags.
- Capture all the client data you need and scale your business without losing the personal touch by using unlimited 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, grow profitability, and win more business.

According to our customers, since adopting Lawmatics:

- 95% of users increased revenue
- 91% increased efficiency
- 80% of respondents say we've increased their client satisfaction

For more information, please visit [www.lawmatics.com](http://www.lawmatics.com)



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Lawmatics  
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**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, grow profitability, and win more business.



**Company History** Lawmatics was founded in 2017 based on the vision of attorney-turned-entrepreneur Matt Spiegel. Lawmatics was recognized as Product of the Year in the CRM category at the Sales and Marketing Technology Awards in both 2023 and 2024. 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 has been awarded a Silver and two Bronze Stevie Awards for customer service by Business Intelligence Group. Lawmatics has also been named an Inc. Power Partner the last two consecutive years.

# Document Management



Legal Teams Can Concentrate on What Matters Most – Their Clients – Using Filevine’s AI to Mine Data and Extract and Generate Information



NetDocuments Adds to Areas Where Legal Professionals Do Their Best Work



# Legal Teams Can Concentrate on What Matters Most – Their Clients – Using Filevine’s AI to Mine Data and Extract and Generate Information

“ Instead of manually writing or searching for standard provisions, users have a customizable toolkit of pre-approved legal clauses at their fingertips. Begin typing a clause title within a document, and the clause library will instantly suggest all options. When the desired clause is selected, it can be inserted directly into the document.”

**Company Name Brand**  
Filevine

**Product Name Brand(s)**  
Filevine

**Latest Developments and Updates**

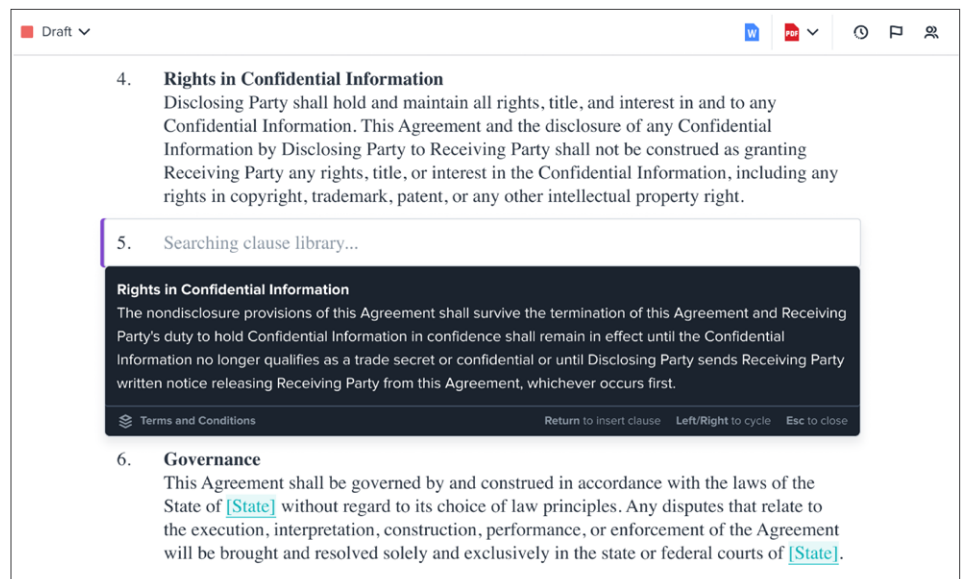
- New and evolving AI (artificial intelligence) tools will continue to assist legal teams in streamlining workflows and increasing efficiency and accuracy around reviewing documents and drafting complex documents.
- Settlement calculator helps streamline settlement management and integrates into the legal team’s workflow.
- Clause library that pulls from existing document templates designed by the firm, driving efficiency, flexibility, and compliance in document generation.
- Bidirectional sync of variables between a case and document allows the most up-to-date information to reflect in both avoiding discrepancies between documents and matter details.

**Transforming Your Legal Practice**

The name Filevine comes from the idea that information grows in a case, similar to how leaves grow on a vine. Filevine’s leaves consolidate emails, tasks, documents, and more, saving users from having to remove these leaves from many locations and applications. Filevine’s single platform enables attorneys and paralegals to easily access all of their leaves in one place and work together. Filevine’s intuitive interface gives legal teams easy access to all elements of their cases via the left navigational panel, including the activity feed, calendar, intake, docs, case summary, settlement worksheet, meds, expenses, deadline chain, depositions, team, contacts, related cases, and conflict check. The platform has several AI-powered capabilities that automate work, free attorneys’ time for other crucial tasks, and help transform how they practice law.

**Document Management**

Document management is a crucial area in Filevine. The docs section displays a list of



**Figure 1:** The clause library streamlines document creation and helps a firm enforce consistency and accuracy.

“ AIFields uses the power of AI to extract and organize information from case documents. It summarizes and pulls important information from your documents. Text and handwritten notes are first scanned using OCR (optical character recognition). AI then analyzes and reviews the scanned document, outputting the information into an AIField. The extracted analysis can be pulled into reports or referenced in generated documents, along with other data fields.”

case documents organized by folders and provides essential tools for managing, organizing, and accessing case-related files. Users can efficiently interact with files to find relevant information. Standard features include document preview, batch operations (copy, move, etc.), document editing within the platform, version history, and creating shareable links for specific documents. Filevine provides straightforward methods for uploading and downloading documents and supports keyboard shortcuts for efficient navigation.

The fly-out menu is a convenient way to review essential details about any file within a case quickly. Clicking on the ellipsis next to the document name displays the file name, type, date created, date modified, version history (if applicable), secure links (if generated), and custom tags associated with the file. The file properties menu streamlines the team's workflow by providing quick access to important file details without navigating away from the document list.

Filevine has several document creation and **document assembly** features that empower legal professionals to handle case-related files efficiently, collaborate with team members, and maintain accurate records. Doc Gen is the primary form of document generation in Filevine and is simple to set up and use. Users can create intuitive files with Doc Gen using variables and data from their caseload with just a click of a button, avoiding duplicative re-entry of information from the case into documents.

The clause library is another powerful feature in Filevine that streamlines legal drafting by providing a centralized repository of pre-written legal clauses. Instead of manually writing or searching for standard provisions, users have a customizable toolkit of pre-approved legal clauses at their fingertips. Begin typing a clause title within a document, and the clause library will instantly suggest all options. When the desired clause is selected, it can be inserted directly into the document. Text can be previewed before inserting it, making it easy to choose the proper clause if there are multiple options with the same title or ID. Legal teams can benefit from creating a library of clauses for their specific practice areas and frequently used contracts or forms, streamlining workflows and achieving higher consistency and accuracy. *See Figure 1 on the previous page.*

## AI Features

To promote communication and assist users in efficiently and successfully navigating the Filevine platform, SidebarAI is an AI-driven chatbot. It can provide guidance, simplify circumstances, and offer answer prompts for “how-to” questions. SidebarAI has the ability to provide summaries of all cases, subjects, and projects active over the last seven days. When a question is entered into SidebarAI, it searches the help center for relevant information and quickly returns the results.

**AIFields** uses the power of AI to extract and organize information from case documents. It summarizes and pulls important information from your documents. Text and handwritten notes are first scanned using OCR (optical character recognition). AI then analyzes and reviews the scanned document, outputting the information into an AIField. The extracted analysis can be pulled into reports or referenced in generated documents, along with other data fields. Use AIFields to **summarize or analyze** contracts, medical records, expert reports, academic literature, legal documents, depositions, and much more. The analysis will include a hyperlink to any referenced page. You can compare the AI analysis side by side with the referenced document. Minimize the time spent on manual document review and fact-checking efforts, reduce human error, and empower the legal team to focus on strategic tasks by utilizing AI. *See Figures 2 and 3 on the next page.*

## ImmigrationAI

**ImmigrationAI** aims to expedite the immigration process through task automation, elimination of common errors, and increased accuracy. ImmigrationAI gathers vital data, scans and extracts important information from client papers, populates USCIS (US Citizenship and Immigration Services) forms, and monitors progress in form completion. After a user uploads client papers into the platform, the ImmigrationAI technology will scan and extract the relevant client data. Foreign language documents can be processed with relevant information translated into English. It can look for discrepancies between data from client documents versus information you have on file. Client questionnaires to gather additional information can be viewed in over 170 languages. Data gathered from documents and questionnaires is used to populate the USCIS forms. ImmigrationAI

“ ImmigrationAI aims to expedite the immigration process through task automation, elimination of common errors, and increased accuracy. ImmigrationAI gathers vital data, scans and extracts important information from client papers, populates USCIS (US Citizenship and Immigration Services) forms, and monitors progress in form completion.”

will also maintain the current version of USCIS forms ensuring outdated forms are not filed.

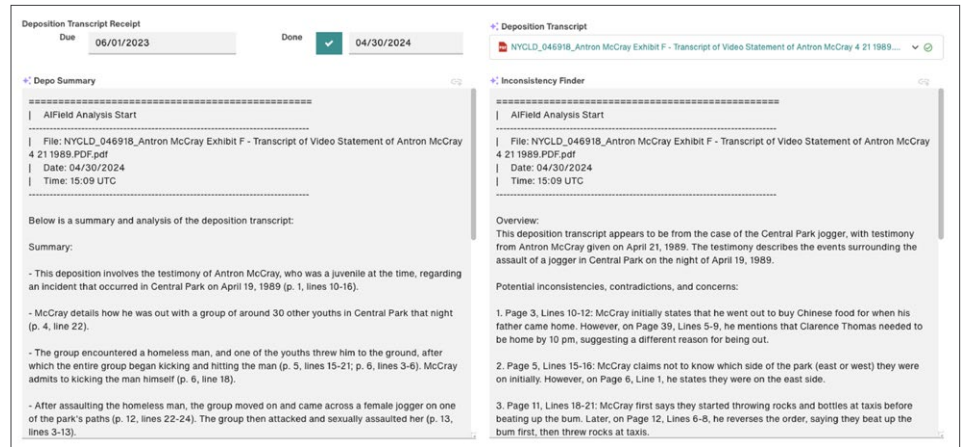
### DemandsAI

DemandsAI is a powerful tool within Filevine that transforms the process of creating demand letters for legal professionals. Drafting compelling demands can be crafted much faster, freeing time for staff to focus on high-value tasks and exceptional client service. All while using a firm’s current writing style. Leverage AI to build stronger arguments backed by the unique facts and details of a case while reducing the need for manual drafting.

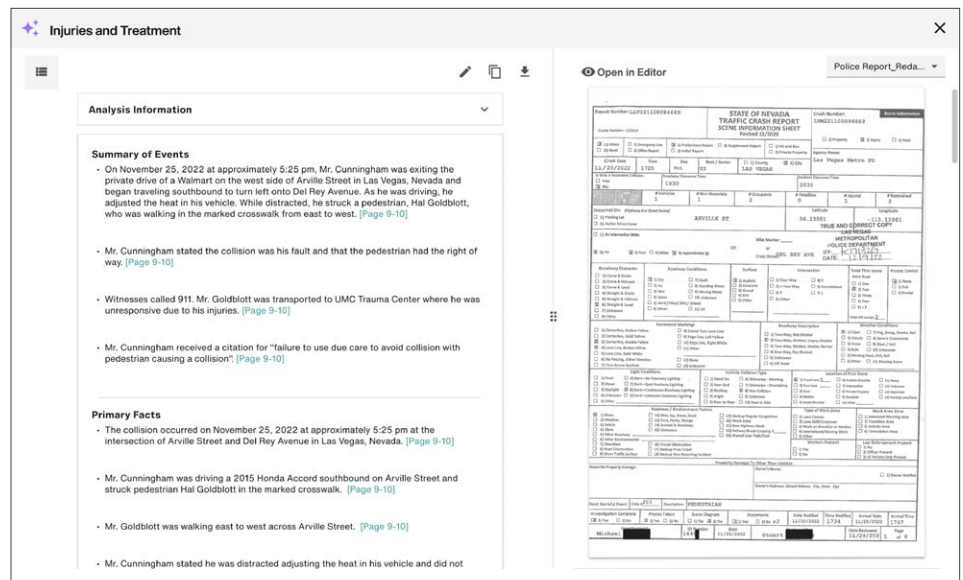
The benefits of AI in legal practice are numerous. Filevine uses AI to provide valuable data insights, reduce costs, flag potential gaps or red flags in a case, and identify key information and inconsistencies. This information is then pulled into documents, including complaints, court motions, summaries, and demand letters.

### Integrations

In addition to tight integration with Microsoft Office, Filevine offers an API that plays well with other applications, allowing users to customize Filevine as a single location for daily tasks and a hub to perform case work. The most common



**Figure 2:** Depositions are analyzed, and through AI functionality, users can view a summary of key points in the transcript and get a list of inconsistencies, allowing attorneys to zero in on key elements of a case.



**Figure 3:** Filevine’s AI features enable users to get a quick summary and analysis of critical information that can be pulled from documents and forms, significantly saving time and money.

integrations include Zapier, Slack, and Google (calendar, Gmail). Filevine's integration with DOMO provides visual and dynamic reporting dashboards to boost productivity across all matters and oversight into the organization as a whole.

### 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.

Filevine prioritizes security through encryption, access controls, audit trails, and compliance with legal standards. These security measures extend to the AI tools.

### Pricing

All Filevine licenses include unlimited document storage, cloud-based case and task management, robust configurable reporting, automated workflows, calendaring, team collaboration tools, contact management, guest access, instant email or text communication, enterprise-level security, and powerful integrations. More modules are offered for an additional cost. Contact Filevine for detailed pricing and further details.

### 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 custom-built AI-powered solutions with the legal user in mind. Fueling everything from lead intake and e-signatures to document assembly, 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 Use Filevine?

- Incorporating AI helps you better understand your cases, what is in your case documents, and helps draft your documents. AI can save time and improve accuracy, allowing you to focus on more substantive work and less manual review.
- Best-in-class security and unlimited storage.
- Multiple customer support options, including live help and expert teams.
- Filevine is constantly developing new features to improve efficiency, create oversight, and streamline document assembly and legal workflows.

### Take a Look at Filevine Today!

See how Filevine can make a real difference. [Schedule a demo](#) now, or check out the videos on the Filevine [YouTube channel](#). ■

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## NetDocuments Adds to Areas Where Legal Professionals Do Their Best Work

“As a member of the Microsoft Cloud Storage Partner Program (CSPP) and Cloud Storage Partner Program Plus (CSPP+), NetDocuments is one of a select few vendors to offer deep interoperability with Microsoft 365, enabling features like native co-authoring.”

### Company Name Brand

NetDocuments

### Product Name Brand(s)

NetDocuments DMS, ChatLink for Teams, ndMail, CollabSpaces, ndSync, PatternBuilder, PatternBuilder MAX, SetBuilder, DocuSign eSignature Integration, Tasks, Data Loss Prevention (DLP), Workspace Security Manager (WSM), Analytics

### Latest Developments and Updates

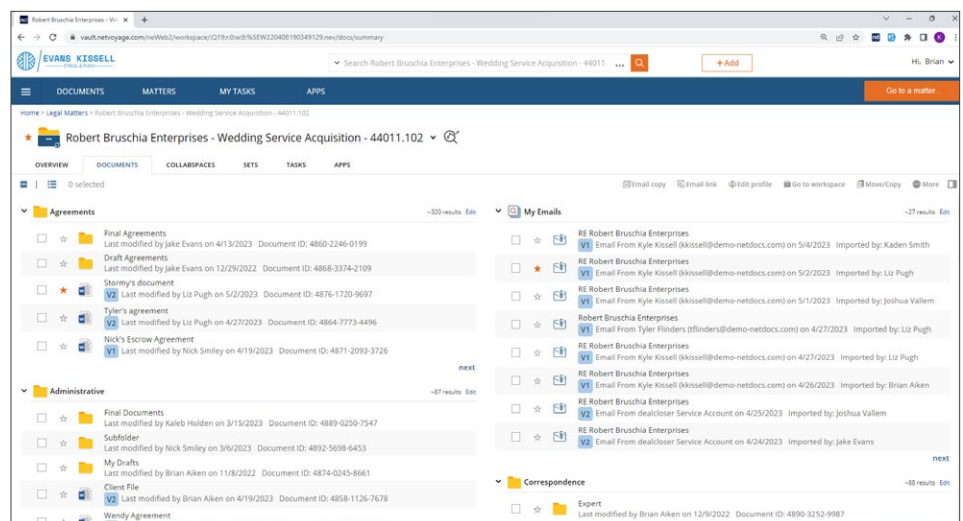
- PatternBuilder MAX includes out-of-the-box apps with generative AI to address common legal use cases and a no-code app builder to allow users to customize pre-built apps or build their own bespoke apps to address even the most complex or unique documents and workflows.
- Legal professionals can easily find documents and information within NetDocuments DMS from directly inside Teams and Outlook using the Microsoft Copilot integration.

- NetDocuments enhanced its web-based integrations and filing experience within Microsoft Outlook and Outlook mobile.
- NetDocuments’ Teams app experience provides a seamless look and feel, trusted security, and an ability to access documents from within NetDocuments.

### Streamline Your Process

Lawyers use multiple applications, but switching tools and contexts is inefficient, consuming time and mental energy. NetDocuments’ legal-specific document management system (DMS) meets legal professionals where they work, such as in Microsoft Outlook, Teams, and Word, significantly reducing the burden of switching back and forth between these applications and NetDocuments DMS.

NetDocuments provides a cloud-native, matter-centric DMS that delivers a single system of record for securing, organizing, automating, and collaborating on



**Figure 1:** NetDocuments organizes matter workspaces into functional tabs providing external collaboration and document sharing (CollabSpaces), binder generation with SetBuilder (Sets), document and task management (Tasks), and automation (Apps) within the DMS.

“ NetDocuments complements how lawyers collaborate in Teams digital workspaces and Outlook email. Without leaving Teams and Outlook, lawyers can use the Microsoft Copilot integration to make natural language search requests and receive results linked to content stored in the NetDocuments DMS.”

documents related to matters in workspaces. See Figure 1 on the previous page.

NetDocuments embraces Microsoft’s vision of the future of work and lawyers’ experience working in Microsoft 365 using collaborative tools and artificial intelligence (AI).

**The Future of Work: Collaboration and Artificial Intelligence**

NetDocuments complements how lawyers collaborate in Teams digital workspaces and Outlook email. Without leaving Teams and Outlook, lawyers can use the [Microsoft Copilot integration](#) to make natural language search requests and receive results linked to content stored in the NetDocuments DMS.

NetDocuments’ Teams app seamlessly integrates with Teams, reducing the time spent toggling between applications and improving productivity, security, and collaboration. It uses NetDocuments’ trusted security to access documents in the DMS and make notes, all within Teams.

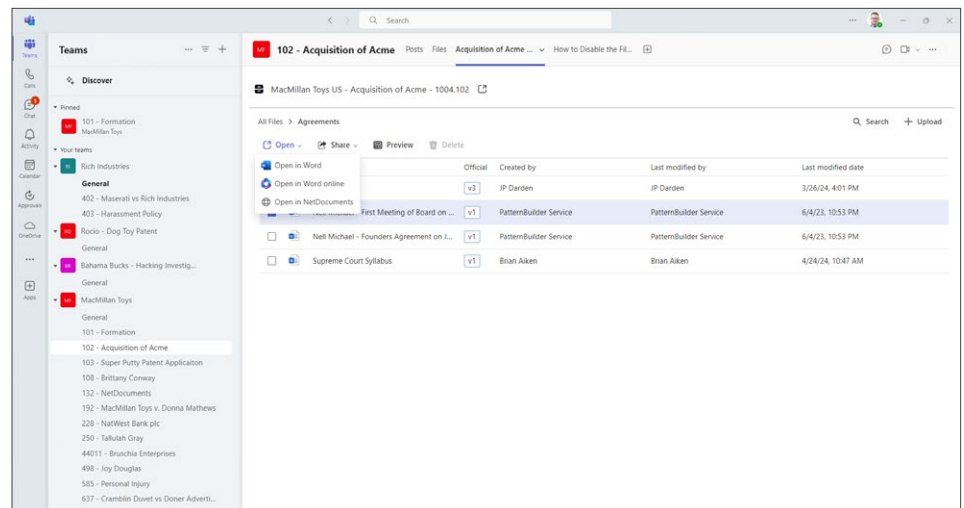
Teams’ users generally pull documents from their source of truth and copy them into Teams to share work, which creates data governance concerns in access controls and duplication. But that’s not the case with NetDocuments. Users can query the DMS from within Teams, and NetDocuments checks a user’s access permission before it loads document views and provides access to documents. Before opening a document to edit, you can view document versioning information, access

permissions, and make margin notes separate from the document that safeguards your notes if the document is shared with a client or another person outside the firm.

Users can link a team or channel to a specific workspace or location in NetDocuments. As a member of the Microsoft Cloud Storage Partner Program (CSPP) and Cloud Storage Partner Program Plus (CSPP+), NetDocuments is one of a select few vendors to offer deep interoperability with Microsoft 365, enabling features like native co-authoring. See Figure 2.

You can use [ChatLink for Teams](#) to send channel posts to message threads (Thread) in a corresponding matter workspace. If you delete or remove a Team, the communications record remains intact in NetDocuments. Within Teams, search NetDocuments for the content to review and collaborate with Margin Notes.

Margin Notes allows you to edit and comment on a document collaboratively without the need to edit directly in the document. This avoids the “checkout wars,” version conflicts, and other challenges that arise when teams need to collaborate on a document in real time. Open a document in Teams and review and comment on it in Margin Notes. The notes provide an ongoing discussion by the editors. You can view the Margin Notes in Teams or NetDocuments and review and comment in real time, regardless of your interface.



**Figure 2:** With a view from Teams into a NetDocuments workspace, you can open a document in Word, NetDocuments, or Word Online to co-edit.

“Nine purpose-built Studio Apps come with PatternBuilder MAX, which provides a starting point for large law firms to develop unique workflows and perhaps an endpoint for smaller firms that might use the apps without modification.”

Microsoft is moving from COM-based add-ins to lightweight web-based add-ins, and NetDocuments is moving in tandem. With NetDocuments' new web-based integration with Outlook, NetDocuments predictive email filing uses AI to predict filing locations and drive recommendations. NetDocuments crowdsources the firm's filing habits and knows where lawyers file documents. While filing, you can retitle the file so it's easy to find and modify access rights, such as if you need to mark it for your eyes only.

NetDocuments can automatically file incoming and outgoing replies to an original message when you engage in conversation filing. With outgoing emails, NetDocuments' file and attachment management in Outlook lets you attach files. You have different options to attach or share files, send a link, or secure a link. The same mail-filing experience, file attachment, and sharing features are available on Outlook mobile.

#### File Sharing and CollabSpaces

Users can set up a secure workspace or CollabSpace and drag and drop folders and files into them to share. A matter workspace can support multiple CollabSpaces as subsets of a matter. Shared content is not replicated but stays in one place, making governance straightforward. Access rights remain consistent with the organization's compliance requirements, and the system tracks and logs all file access and changes.

A firm can prevent file sharing by applying data loss prevention (DLP) policies to content and data classifications. Using special DLP rules, firms can prevent users from attaching DMS content to an email or adding it to a CollabSpace. DLP can prohibit users from modifying, copying, or printing files stored in the DMS. The rules can also prohibit syncing documents with ndSync and stop users from delivering secure links to documents.

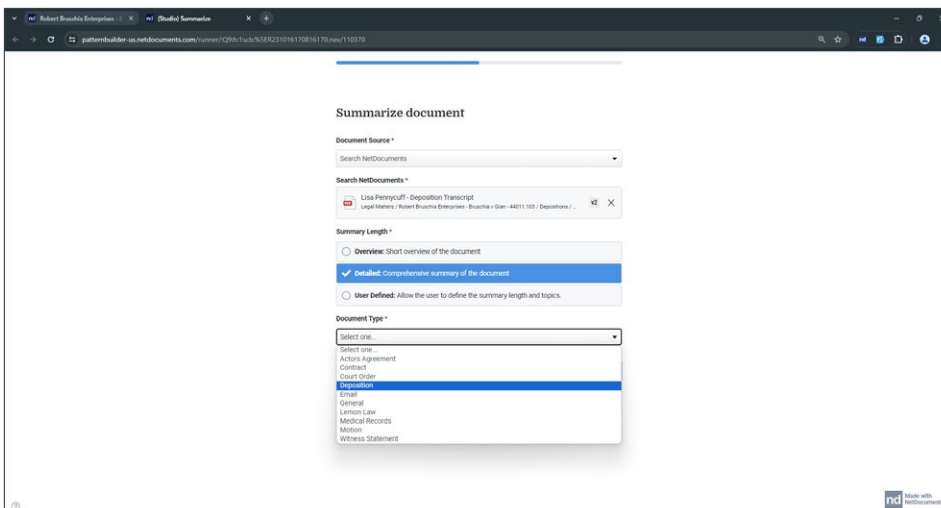
#### Purpose-Built AI Apps

NetDocuments has purpose-built, generative AI apps that work on documents and email messages in the DMS. With **PatternBuilder MAX**, you can build, configure, and use generative AI in specific workflows for individuals, teams, or the entire firm.

PatternBuilder MAX enhances NetDocuments' built-in, no-code document assembly and workflow capabilities by allowing firms to create custom generative AI prompts and automation tailored to the needs of specific practice areas and legal tasks.

PatternBuilder MAX leverages Microsoft Azure OpenAI to enable secure and responsible use of the latest large language models (LLM) like GPT 4 while keeping confidential documents and data secure within the NetDocuments platform. Nine purpose-built Studio Apps come with PatternBuilder MAX, which provides a starting point for large law firms to develop unique workflows and perhaps an endpoint for smaller firms that might use the apps without modification. The Studio Apps have the capabilities to:

- Generate a summary of a document in NetDocuments. Users can generate a general summary or apply a summary template for specialized use cases (depositions, loan agreements, etc.). See *Figure 3*.
- Automatically draft a new document, allowing users to select a prior precedent document as an example or draft a document from scratch based on custom instructions. This can include analyzing a patent application rejection letter and writing an appropriate appeal, taking a fact sheet and drafting a new lease, or rejections to demand letters.
- Automatically extract information from documents and store the resulting data in a relational database to facilitate analysis or drive subsequent



**Figure 3:** Configure PatternBuilder MAX Studio Apps to summarize documents by selecting the summary length and document type.

automations. This app is ideal for identifying and storing contract data.

- Instantly analyze an agreement or other document based on the selected contract playbook, including organization-specific contract playbooks that analyze any type of desired agreement. The analysis identifies aspects of the document that do not align with the selected playbook, provides context, and makes recommendations as to how best to ensure the document conforms to the playbook.
- Generate a timeline of events based on the selected text.
- Automatically translate text from one language into another, supporting over a dozen languages.
- Compare two documents based on custom criteria that the user provides.
- Quickly draft the next section of a document based on prior content in the document. Optionally, users can include prior precedents to enhance the quality of the draft further.
- Ask one or more plain-language questions about a document stored in NetDocuments, ensuring quick answers even when the information is buried in lengthy, complex documents.

PatternBuilder MAX, the first product available from the ndMAX suite, connects to Microsoft's Generative AI, but you are not using a free-form chat interface. You control the input, system, user message, the model used, and the context window.

Maintaining the security and confidentiality of your documents and data is a critical element of the responsible application of generative AI in legal. With PatternBuilder MAX, not only is your information not used to train Microsoft's LLMs, NetDocuments and Microsoft have a zero-day content retention policy on AI, which means Microsoft retains neither your input nor output.

Additionally, NetDocuments is one of a small number of providers to have secured an exemption to Microsoft's abuse monitoring policy. This exemption ensures neither inputs to nor outputs from Microsoft's LLM AI are subject to systematic or human oversight by Microsoft. Additionally, firms and departments can set up ethical walls to control the matters and clients for which generative AI-powered applications can be used and make policy-oriented decisions

around the use of AI applications by individuals, such as first-year associates.

If you don't use PatternBuilder MAX, NetDocuments still provides PatternBuilder, a no-code document automation environment to create custom Microsoft Word or PDF documents from user input, such as form-filled or database-driven questionnaires and surveys with variables to store user input. The output document, such as an intake form or retainer agreement, can trigger a workflow or add to an existing flow using Microsoft Teams, Microsoft Power Automate, or NetDocuments' tasks and notifications.

To simplify and enhance your workflows, you don't have to leave NetDocuments to create tasks for associates and staff. In the tasks tab of a matter workspace, create assignments in message format, as if you were in Threads, using an "@" mention and include links to documents from the DMS without making a copy. Review assigned tasks, comments, status, and details in list views or Kanban-style boards, such as due dates and checklists.

Legal professionals often create documents from multiple files in tedious and time-consuming processes. Whether they work in M&A, real estate, or criminal law, lawyers and staff make deal bibles, closing binders, trial exhibits, witness packages, electronic court filing packages, and more. [SetBuilder](#) collects and organizes documents of various file formats and email messages into a zipped file or a single consolidated PDF, complete with a cover page, a hyperlinked table of contents, and bookmarks for sharing and collaborating.

#### **NetDocuments: A Versatile Platform**

NetDocuments supports an open application programming interface (API) to connect data sources and systems with the DMS. Customers access over 500 integrated applications within the platform weekly, including its deep penetration into Microsoft Teams, Outlook, and Word. You can choose from more than 150 apps in NetDocuments' [App Directory](#).

For example, DocuSign eSignature integration makes it easy to collect a signature by right-clicking any document in the DMS, and PacerPro integrates with NetDocuments to store and track federal filings in their respective workspaces with custom document profiles using PACER metadata.

#### **Pricing**

NetDocuments and its channel partners sell the software monthly per user with added costs depending on implementation requirements and additional software modules and apps, such as PatternBuilder MAX, which uses a predictable subscription model.

#### **Who is NetDocuments?**

NetDocuments, a leading cloud-based content management and productivity platform, is a versatile and trusted partner to legal professionals. With a strong foundation of 25 years in cloud innovation, NetDocuments offers a complete end-to-end document and email organization and management platform. It features robust security, collaboration, search technologies, seamless integrations with software professionals use daily, and automation and AI capabilities that ensure the security and guardrails to manage AI responsibly. Over 7,000 law firms, corporate legal departments, and public sector entities globally rely on the versatility and capabilities of NetDocuments.

#### **Why Buy NetDocuments?**

- NetDocuments is a legal-specific DMS that meets legal professionals where they work, such as in Microsoft Outlook, Teams, and Word.
- Access documents in NetDocuments DMS securely from inside Teams and collaborate and comment on documents without opening them in Word.
- Automate everyday law firm tasks with generative AI-powered workflows that summarize, compare, and generate documents and emails stored in the DMS.
- Set up secure CollabSpaces in matter workspaces easily and share documents with colleagues and third parties.
- NetDocuments supports an open application programming interface (API) to connect data sources and systems with the DMS.
- Native co-authoring to enable real-time collaboration in Microsoft 365 applications.

#### **See NetDocuments Today!**

Law firms, corporate legal departments, and public sector entities choose NetDocuments as a versatile and trusted cloud platform for their best work. [Request a personalized demo](#) to see if NetDocuments suits your law firm. ■

# Unleashing the Power of AI in the Legal Profession: A Comprehensive Overview

By: Dan Hauck



Dan Hauck is a former practicing lawyer and is passionate about delivering enabling technology to the legal industry. At NetDocuments, he is the Chief Product Officer and responsible for all products and the user experience across the platform. Dan also develops the strategic vision and roadmap for the company. Previously, Dan was the founder and CEO of the ILTA-award-winning company ThreadKM, a knowledge management and messaging platform for professionals. ThreadKM was acquired by NetDocuments in November 2017. Dan has spoken at numerous events about legal technology, including ILTACON, Lawtech, and LexThink.

The legal profession is undergoing a significant transformation, largely driven by the advent of artificial intelligence (AI). As AI technologies continue to evolve, they are fundamentally altering how legal professionals operate, making processes more efficient and outputs more predictable. This overview explores the transformative impact of AI on the legal industry, focusing on large language models and their application in legal tasks.

## AI-Powered Automation: A Good Place to Start

To meet heightened productivity demands, legal professionals are turning to next-generation automation technologies. When leveraged strategically, these tools have the potential to optimize workflows, automate repetitive tasks, and enable teams to deliver greater strategic value. In fact, according to a recent survey by PwC, businesses can **save between 30%-40% of the hours** typically spent manually inputting, mining, and extracting information from documents by elevating automation to the next level with the help of AI. Some teams are seeing as much as a 90% shift in time savings on particular tasks.

Successfully integrating technological capabilities that align with specific needs is crucial for law firms and legal teams. However, determining which technologies will have the most significant impact can be challenging. Simply adopting technology for its own sake may not enhance productivity or client satisfaction. It's essential to discern where automation can genuinely revolutionize efficiency without sacrificing the human touch.

To fully realize the benefits of new technologies, map out the business processes and identify the workflows you are trying to address so you can select the most suitable technology to meet those needs.

## Customizable AI Tools for Legal Workflows

Modern AI tools are not only about automating tasks; they are also about augmenting the capabilities of legal professionals. Customizable AI tools allow legal professionals to create bespoke automations tailored to their workflows. For instance, AI tools can:

- **Extract key data points from documents:** AI can automatically extract key data points from documents, such as the parties involved in a contract or the key terms of a lease agreement.
- **Generate new documents based on prior precedents:** AI can use extracted data to generate new documents, such as demand letters, based on prior precedents. This not only speeds up the drafting process but also ensures the generated documents are in line with the firm's standards.
- **Automate repetitive tasks:** AI can automate repetitive tasks, freeing up legal professionals to focus on more complex and strategic work.

And so much more.

## Understanding AI and Large Language Models

Powered by large language models (LLMs), generative AI gives people with expertise and knowledge the ability to create, analyze, and innovate with unprecedented speed and accuracy, transforming work and enhancing productivity. This is made possible through a process called vector embedding, which allows the AI to identify and understand the most important words in a sequence of text.

Large language models can:

- **Draft legal documents:** AI can generate drafts of legal documents, saving valuable time and reducing the risk of human error.

- **Analyze large volumes of text:** AI can quickly and accurately analyze large volumes of legal text, identifying key points and trends.
- **Enhance Client Services:** By automating routine communications and providing initial client consultations, LLMs can enhance client service by ensuring quick, consistent, and informative responses to client queries. They can also help in creating personalized updates for clients on the status of their cases, ensuring that lawyers maintain regular and efficient communication.

Kim Konotchick of Microsoft emphasizes the unique opportunities AI presents for the legal industry, stating, *"The legal industry has large documents. Very unique and intricate language in those documents, and that's perfect for today's large language model and generative AI."*

### The Ethical Considerations of AI in the Legal Profession

While the adoption of AI in the legal profession is growing, it's important to approach it responsibly. Legal professionals need to understand the capabilities and limitations of AI tools and ensure they are used ethically and appropriately. Key considerations include:

- **Transparency:** Legal professionals should understand how AI tools work and be transparent with clients about their use.
- **Accuracy:** While AI can improve efficiency and reduce errors, it's not infallible. Legal professionals should always review AI-generated work for accuracy.

- **Confidentiality:** AI tools should be used in a way that respects client confidentiality and privacy. Most AI providers will tell you that your client information or intellectual property will not be used to train their model(s), but it is important to ask deeper questions. For how long are the inputs and outputs to those models stored? Are inputs and outputs subject to algorithmic or human oversight in what is commonly known as "abuse monitoring" programs? To preserve confidentiality, seek zero-day retention and exemption to systematic or human oversight.

### Why the Cloud Is More Important Than Ever

Organizations have recognized the benefits of the cloud over on-premises systems in terms of cost, agility, resiliency, and capabilities of cloud-first strategies. AI is further encouraging a shift because it relies on the capabilities of the cloud.

An organization's data, both structured and unstructured, serves as the fuel for powering any generative AI technology used in legal work. The more data you can access as an organization, the better positioned you are for success when introducing AI to legal tech. For this reason, **AI workloads demand an infrastructure that can process the appropriate amounts of data at speed.** And for legal organizations, all this must be done in a way that is highly secure and maintains appropriate confidentiality, access controls, and ethical walls.

Gaining buy-in from decision makers, carefully evaluating cloud providers, and promoting adoption across the

organization are critical steps for a successful transition to a cloud-first strategy. By embracing the cloud and integrating AI technologies, legal professionals can streamline workflows, increase productivity, and deliver greater value to their clients in today's rapidly evolving legal landscape.

### AI's Living Up to the Hype

The AI revolution in the legal industry is not just hype — it's a paradigm shift that's transforming the way legal professionals work. By harnessing the power of AI, legal professionals can improve efficiency, reduce errors, and deliver better results for their clients.

As AI continues to evolve, so too will the opportunities it presents for the legal profession. Embracing AI is not about replacing legal professionals but about equipping them with powerful tools that can enhance their work and deliver superior results.

As we look to the future, it's clear that AI will continue to play an increasingly important role in the legal profession. By understanding and embracing these technologies, legal professionals can stay ahead of the curve and ensure they are ready for the future of law.

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# Legal Operations



A Comprehensive Legal Operations  
Suite for Modern Firms



Navigating the Complexity: CobbleStone  
Contract Insight Delivers Centralized and  
AI-Backed Contract Management



Filevine Docs+ and AI Functionality Help  
You Accelerate Legal Work, Reduce  
Errors, and Gain Insight

# Orion Law: A Comprehensive Legal Operations Suite for Modern Firms

“ The system supports matter-specific tracking and allows real-time comparison against budgets and profitability goals. Once time is recorded, it flows directly into the billing module, where users can generate detailed invoices, apply billing rules, and monitor collections with ease.”



**Company Name Brand:**  
Orion Law Management Systems, Inc.

**Product Name Brands:**  
Orion Law Management Systems  
Orion ePay®  
iOrion®

## Latest Developments and Updates

### Tabbed Navigation for Docked Panels:

Users can easily switch between various managerial tasks through a tabbed interface, improving desktop usability.

### Expanded Digital Payments:

Orion ePay® supports payment methods, including PayPal, enhancing client flexibility.

### Simple, Secure File Sharing and eSignature:

Send and receive files and collect electronic signatures directly from your inbox with the LexShare integration.

### Refined Time Entry Interface:

Enhanced layout and responsiveness for improved time entry experience.

### API Enhancements:

Facilitating more comprehensive integration with external client management systems.

### Cloud-Based Document Assembly Upgrades:

Easier configuration and management of document templates directly in the cloud environment.

### Enhanced AR Collection:

Orion's AR Collection Manager dramatically streamlines collection efforts, providing the billing attorney and accounting staff with an instant, updated snapshot of open invoices, collection updates, and payment expectations.

### Improved Mobile App:

iOrion® is a complete financial management mobile application

empowering legal professionals to access data from Orion, providing access to critical information about clients, related contacts, and cases from anywhere.

### Updated Dashboards:

Orion Dashboards deliver easy to understand and concise insight into your law firm's most important business questions with up-to-the-minute information.

## Orion Law: Worth a Closer Look

Today's legal firms need software beyond simple billing; they require an integrated solution that manages all operational aspects. Orion Law Management Systems addresses these needs, providing mid-to-large-sized firms a unified platform for billing,



Orion ePay®

**simplifies the payment process, enabling firms to accept electronic payments via credit card, ACH transfer, Venmo, and PayPal, including Pay Later. This flexibility helps reduce payment delays and improves the client experience.”**

timekeeping, accounting, document management, trust accounting, and client engagement.

With 40 years in the industry, Orion’s scalable, modular design easily integrates with Microsoft Office 365 and Worldox, streamlining complex workflows. Firms can efficiently customize and expand functionality, from automating routine tasks to accessing actionable analytics, improving productivity and decision-making.

Orion delivers an intuitive, comprehensive practice management experience, empowering legal teams to centralize operations, enhance accuracy, and deliver superior client service.

### **Time Capture and Billing**

Orion features a versatile time tracking system that adapts to the way attorneys work. Users can log time manually, use built-in timers, or enter time directly from integrated tools like Microsoft Office 365. The system supports matter-specific tracking and allows real-time comparison against budgets and profitability goals. Once time is recorded, it flows directly into the billing module, where users can generate detailed invoices, apply billing rules, and monitor collections with ease.

The flexible and intuitive time and billing system caters to the diverse needs of legal professionals. For firms that utilize phone systems to track client calls, Orion offers integration to log time spent on client communications automatically. This multi-faceted approach ensures time is accurately recorded and easily converted into billable entries, helping maximize revenue while minimizing administrative effort.

### **Workflows**

Designed with the needs of midsize to large law firms in mind, Orion’s workflow engine supports structured, role-based collaboration across departments. Each

workflow is built to reflect the real-world processes of legal operations, allowing attorneys, paralegals, and administrative staff to work together seamlessly. Whether routing a document for approval, managing a billing cycle, or tracking a client intake process, Orion ensures that tasks are assigned, monitored, and completed efficiently. This structured approach reduces bottlenecks, improves accountability, and enhances overall productivity.

### **Payments and Trust Accounting**

Orion ePay® simplifies the payment process, enabling firms to accept electronic payments via credit card, ACH transfer, Venmo, and PayPal, including Pay Later. This flexibility helps reduce payment delays and improves the client experience. The trust accounting module ensures compliance with legal standards by maintaining separate ledgers for each client and supporting full three-way reconciliation. All payment activity is integrated with Orion’s financial modules, providing a thorough and accurate financial picture.

### **Automation, Task Management, and Dashboards**

Orion includes a comprehensive suite of automation features to reduce manual tasks and promote greater operational consistency. For example, users can automate the creation of frequently used documents, set recurring financial and operational entries, and configure automatic alerts triggered by predefined events. The integrated calendar and task management system facilitates deadline monitoring, enabling shared team visibility and efficient, rules-based scheduling.

Advanced real-time dashboards offer detailed insight into critical aspects of firm performance, including billable hours, outstanding collections, and profitability metrics. Orion’s analytics

“Leveraging historical data and future projections, users can create budgets at various levels, such as firm-wide, departmental, or matter-specific. These tools allow a firm to model different financial scenarios, compare actual results against targets, and adjust plans as needed.”

capabilities extend your options with customizable visual reporting, enabling users to easily drill down into individual metrics or broader performance trends. See Figure 1.

Using **Orion Visual Analytics**, a firm can interactively explore its data and make informed decisions based on timely and accurate business intelligence.

In addition, Orion's automated notifications help ensure that team members remain informed of key operational milestones, deadlines, and potential issues, further reinforcing accountability and reducing oversight. By streamlining processes and providing clarity through advanced analytics, Orion significantly improves workflow efficiency and enhances strategic planning capabilities across the firm.

### Pre-Bill Manager

**Orion's Pre-Bill Manager** simplifies the billing process by giving attorneys the ability to review and edit draft invoices before they are finalized. This feature creates a streamlined workflow where pre-bills can be generated, annotated, and approved within the system, eliminating the need for back-and-forth emails or printed drafts. Attorneys can make real-time adjustments to

time entries, apply discounts, or add notes, ensuring the final invoice is accurate and client-ready. This not only speeds up the billing cycle but also helps reduce errors and improve client satisfaction. See Figure 2 on next page.

### Embedded Payments Platform

The embedded payments platform in Orion supports a wide range of payment methods, making it easier for clients to settle their invoices. In addition to traditional credit card and ACH payments, Orion offers payments through Venmo and PayPal, including Pay Later. It also accommodates wire transfers and other electronic payment options. Payment links can be included directly on an invoice or sent separately, and all transactions are automatically recorded in the firm's financial system. This integration reduces manual reconciliation, accelerates cash flow, and provides clients with a convenient and secure way to pay. **Orion's AR Collection Manager** simplifies the tracking and management of outstanding receivables by providing instant visibility into unpaid invoices and anticipated payment timelines. By consolidating real-time information for billing attorneys and accounting staff, the tool streamlines collections and reduces the administrative burden of monitoring client payments.

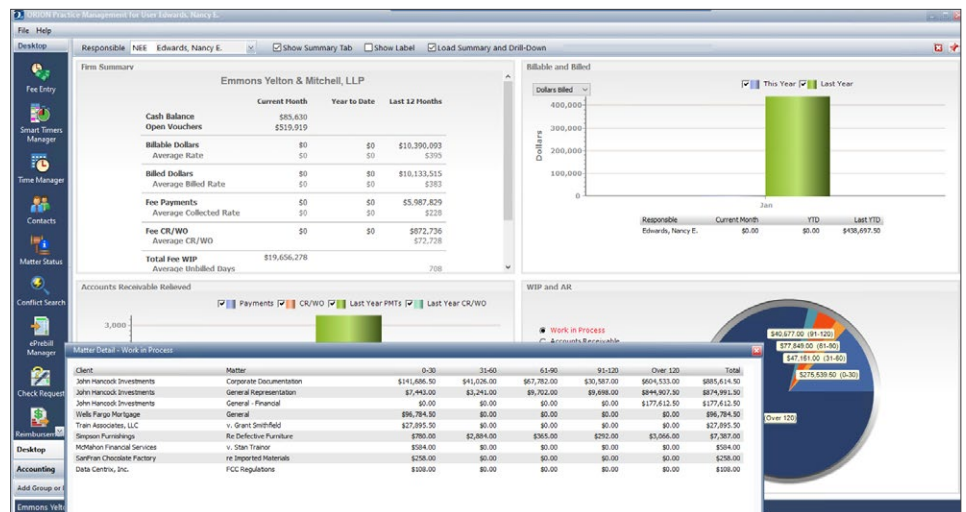


Figure 1: Orion's Visual Analytics dashboard displays essential metrics such as billable hours, profitability, and collection status through graphical representations. Users can easily interact with the interface to gain deeper insights into their firm's overall performance.

## Document and Email Management

Orion's document and email management capabilities help firms stay organized and compliant. The system integrates with leading document management platforms and includes a built-in library for storing frequently used forms and templates. Emails and attachments can be linked directly to matters, ensuring all correspondence is easily accessible and properly archived. With version control, access permissions, and audit trails, Orion ensures that sensitive information is protected while remaining readily available to authorized users.

## Client Portal and Mobile App

The **iOrion® mobile app** and client portal extend the platform's functionality beyond the office. Attorneys can use the mobile app to log time, review case details, manage tasks, and access documents from anywhere. Meanwhile, the client portal provides a secure space for clients to view invoices, make payments, and communicate with their legal team. These tools enhance transparency, improve responsiveness, and support a more modern, client-centered approach to legal service delivery. *See Figure 3 on next page.*

## Custom Report Builder

The custom report builder in Orion gives firms the flexibility to generate reports that reflect their specific operational and financial needs. Choose from various data points and organize them using filters, groupings, and formatting tools. Whether tracking attorney performance, analyzing billing trends, or monitoring collections, the interface makes it easy to design detailed and visually clear reports. Reports can be saved for future use, scheduled for automatic delivery, or shared across departments, making it a powerful tool for data-driven decision-making.

## Budgeting and Forecasting Tools

Budgeting and forecasting tools help law firms plan strategically and monitor financial performance with precision. Leveraging historical data and future projections, users can create budgets at various levels, such as firm-wide, departmental, or matter-specific. These tools allow a firm to model different financial scenarios, compare actual results against targets, and adjust plans as needed. By integrating with Orion's accounting and billing systems, the budgeting module ensures that all financial data is consistent and up

The screenshot displays the Orion Pre-Bill Manager interface. On the left, there is a sidebar with a list of bills, including details for '001234-00002 COHEN, SUSAN' and '001548-00001 PEARSON FOODS, INC.'. The main area shows a detailed view of a bill for '001548 PEARSON FOODS, INC.' with a summary table and a list of bill items. The summary table includes columns for 'Taxable', 'Record #', 'Location', 'Description', 'Orig Hrs', 'Bill Hrs', 'Hely Rate', 'Orig Amt', and 'Change Matter'. The bill items list includes entries such as 'Research and review notes on case and meet with Judge', 'Review and revise case strategy', and 'Telephone conference with opposing counsel regarding settlement agreement'. A summary table at the bottom right of the main area provides totals for 'Total Selected Fees', 'Total Deferred Fees', and 'Total Fees'.

Taxable	Record #	Location	Description	Orig Hrs	Bill Hrs	Hely Rate	Orig Amt	Change Matter
<input checked="" type="checkbox"/>	62498	SAN	Research and review notes on case and meet with Judge	0.10	0.10	\$200.00	\$20.00	L400-L410
<input checked="" type="checkbox"/>	62134	NEE	Review and revise case strategy	0.10	0.10	\$200.00	\$20.00	L400-L410
<input type="checkbox"/>	63134	NEE	Telephone conference with opposing counsel regarding settlement agreement	0.50	0.50	\$100.00	\$50.00	L300-L340
<input type="checkbox"/>	63152	NEE	Telephone call with Paul Yelton - telephone call also with George Smith.	0.20	0.20	\$200.00	\$40.00	L300-L340
<input type="checkbox"/>	63185	NEE	Telephone call with Paul	1.50	1.50	\$200.00	\$300.00	L300-L340
<input type="checkbox"/>	63192	NEE	Telephone call with Paul	0.10	0.10	\$200.00	\$20.00	L400-L410
<input checked="" type="checkbox"/>	63213	NEE	Telephone call with Paul	1.00	1.00	\$100.00	\$100.00	L400-L410
<input type="checkbox"/>	63262	BCR	Attend Deposition of Charles Smith	0.00	0.00	\$0.00	\$0.00	L400-L410
<input type="checkbox"/>	63264	BCR	Draft contracts	1.00	1.00	\$0.00	\$0.00	L400-L410
<input type="checkbox"/>	63274	NEE	Telephone call with Paul Yelton	1.50	1.50	\$200.00	\$300.00	L300-L340
<input type="checkbox"/>	63274	NEE	Telephone call with George Williams regarding contracts	1.30	1.30	\$200.00	\$260.00	

	Orig Hrs	Orig Amt	Bill Hrs	Hely Rate	Bill Amt
Total Selected Fees	3.00	\$600.00	3.00	\$200.00	\$600.00
Total Deferred Fees	217.40	\$40,682.50	172.80	\$236.07	\$40,682.50
Total Fees	220.40	\$41,282.50	175.80	\$236.07	\$40,682.50

**Figure 2:** The Orion Pre-Bill Manager provides a streamlined workspace where attorneys and billing staff can efficiently review and edit invoice drafts prior to finalization. The intuitive layout facilitates quick adjustments, annotations, and approvals directly within the interface.

to date, supporting smarter financial management and long-term planning.

## Integrations

Orion Law provides robust integrations explicitly designed to enhance productivity, efficiency, and seamless workflow management. The platform smoothly connects with widely adopted tools such as Microsoft Office 365, allowing users to synchronize calendars, contacts, tasks, and appointments effortlessly between Outlook and Orion. Additionally, Orion integrates closely with popular document management systems like NetDocuments, streamlining document filing, retrieval, and tracking directly within the software environment.

With Orion's Exchange Sync module, firms gain real-time, two-way synchronization of tasks and calendar entries, significantly reducing redundant data entry. Orion's Productivity Pack extends these capabilities, enabling users to capture billable time, assign tasks, and associate documents or emails to specific matters directly from applications like Word and Outlook.

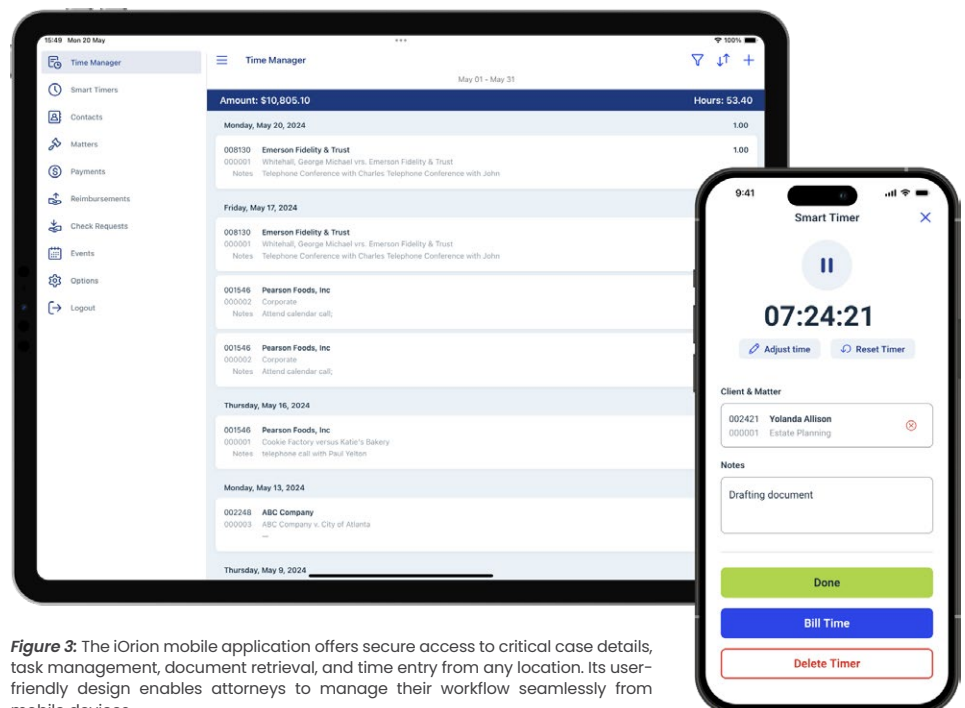
Through these carefully designed integrations, Orion Law empowers legal professionals to consolidate essential activities into a cohesive digital workspace, enhancing accuracy, reducing administrative effort, and improving overall firm productivity.

## Security Overview

Prioritizing security, Orion Law employs advanced encryption techniques to protect sensitive data both at rest and during transmission. Role-based access controls ensure that confidential client and firm information is available only to authorized users, while comprehensive audit trails log all system activity transparently. For cloud-based deployments, Orion maintains secure hosting environments with continuous monitoring, frequent data backups, and regular updates, enabling firms to meet compliance requirements and safeguard critical data assets confidently.

## Pricing

Orion offers a flexible pricing model based on the size of the firm, deployment preferences (cloud or



**Figure 3:** The Orion mobile application offers secure access to critical case details, task management, document retrieval, and time entry from any location. Its user-friendly design enables attorneys to manage their workflow seamlessly from mobile devices.

on-premises), and selected modules. Pricing is customized and available upon request through a consultation or product demo.

## Comprehensive and Flexible Firm Management

Orion Law Management Systems stands out as a powerful, all-in-one solution for law firms seeking to modernize their operations, enhance client service, and fuel growth. Its comprehensive feature set, including time tracking, billing, trust accounting, document management, and analytics, offers a firm the tools it needs to operate with greater efficiency, accuracy, and insight. The platform's built-in automation, customizable workflows, and mobile capabilities support a streamlined, responsive legal practice.

With a strong focus on integration, security, and user experience, Orion provides a reliable foundation for firms looking to grow and adapt in a competitive legal market. Whether managing complex billing cycles, ensuring compliance, or delivering a seamless client experience, Orion equips firms with the technology to succeed. For legal teams ready to elevate their practice management, Orion offers the depth and flexibility to meet today's demands and tomorrow's challenges.

## Who is Orion Law Management Systems

Orion is part of ProfitSolv, a collection of best-in-class software solutions for professional services firms, allowing the freedom for growth and innovation. Their mission is to support clients' growth and profitability by solving their business problems with integrated, easy-to-use technology solutions. Located in Atlanta, Georgia, Orion Law Management Systems, Inc. has served the legal industry for 40 years. The company specializes in delivering enterprise-level software solutions that integrate financial, operational, and client service functions.

Available on-premises and in the cloud, the software enables firms to streamline operations, enhance productivity, and maximize profitability. Orion also provides project planning, data conversion, accounting services, product support, and training. Trusted by hundreds of firms nationwide, Orion is a reliable partner delivering measurable results and a strong return on investment.

## Why Use Orion Law

- Unified legal platform combines billing, accounting, and case management in one system.
- Customizable workflows adapt to each firm's unique needs and processes.
- Mobile accessibility via iOrion® keeps attorneys connected and productive from anywhere.
- Integrated payments through Orion ePay® streamline collections and enhance client convenience.
- Established expertise for over four decades and trusted by law firms nationwide.

## Take the Next Step with Orion Law

Experience how Orion Law can simplify complex workflows and optimize your firm's practice management. [Arrange a customized demo](#) at your convenience and see how Orion's powerful features will improve your efficiency and client outcomes.

# Navigating the Complexity: CobbleStone Contract Insight Delivers Centralized and AI-Backed Contract Management

“CobbleStone Contract Insight leverages VISDOM, its powerful AI engine backed by machine learning that streamlines data insertion, extraction, evaluation, and risk identification. Data entry and extracting critical details like dates, monetary values, and counterparties is automated. VISDOM assesses risk by analyzing document text on a rules-based sentiment.”

**Company Name Brand**  
CobbleStone Software

**Product Name Brand(s)**  
CobbleStone Contract Insight®

**Latest Developments and Updates**

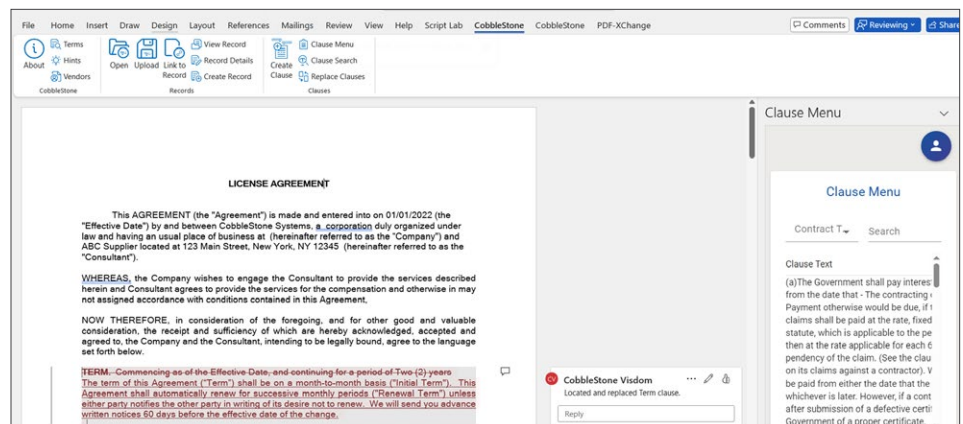
- Preferred clause replacement – users can quickly and easily obtain side-by-side clause comparisons and system-provided suggestions for clause replacement recommendations based on language within the third-party document and standard language within their clause library.
- IntelliDraft.AI<sup>SM</sup> – CobbleStone® released a portal that includes support for client requirements around clause support/management, access to a library with up to 1 million clauses, generative artificial intelligence (AI) clause creation from real machine learning (ML) data, contract summarization, a user-friendly chatbot, and more.
- ConfigAI<sup>SM</sup> – to speed the adoption of contract management software, CobbleStone's ConfigAI can offer

proactive contract lifecycle management (CLM) field suggestions for contract clause metadata fields.

- Auto-Redline – users can establish automatic redlining upon upload or redline documents on an as-needed basis. They may also easily see and manage automated redlines and comments with thorough audit trails. CobbleStone Auto-Redline is compatible with Word and CobbleStone's native online document editor.
- VISDOM+ – ask the VISDOM® Assist chatbot system-related questions and receive answers powered by OpenAI. Additionally, VISDOM will identify contract obligations for user review, and users can ask about applicable laws and compliance regulations such as GDPR, CCPA, and OFAC and generate related clauses.

**Next-Level Contract Management**

The demand for contract lifecycle management solutions has never been stronger, and to meet that demand, CobbleStone Software provides a highly configurable solution called CobbleStone



**Figure 1:** CobbleStone Contract Insight offers an auto-redlining feature powered by VISDOM AI. Handle auto-redlining directly or set it up to execute whenever a contract record receives a .docx file attached. CobbleStone shows the clause menu to the right of a Word document (or within the comparable/similar CobbleStone native online editor), and a CobbleStone toolbar is available to assist with edits.

“CobbleStone’s Auto-Redlining can locate and redline clauses within contract files and recommend modifications based on preferred contract clause versions to standardize terminology, improve consistency, and ensure accurate language. The contract library is entirely customizable for the company’s needs.”

Contract Insight. There are many challenges to managing the contract lifecycle, including decentralized contract storage, contract language and clause limitations, a lack of version control, delays and mistakes in contract approvals and signatures, missed key dates and workflow tasks, and missed contract renewal opportunities. CobbleStone Contract Insight is a comprehensive, end-to-end CLM solution that transforms static contracts into dynamic, efficient building blocks for oversight, risk mitigation, and opportunity identification. Staff members, counterparties, employees, and other key stakeholders can leverage a user-friendly portal and simple intake forms to submit a new request. The portal also features internal reviews, streamlining the process of gathering, tracking, reviewing, and approving contract requests. Companies can assemble and configure essential contract data fields to produce consistent documents.

### CobbleStone’s AI Capabilities Empower Effective Drafting

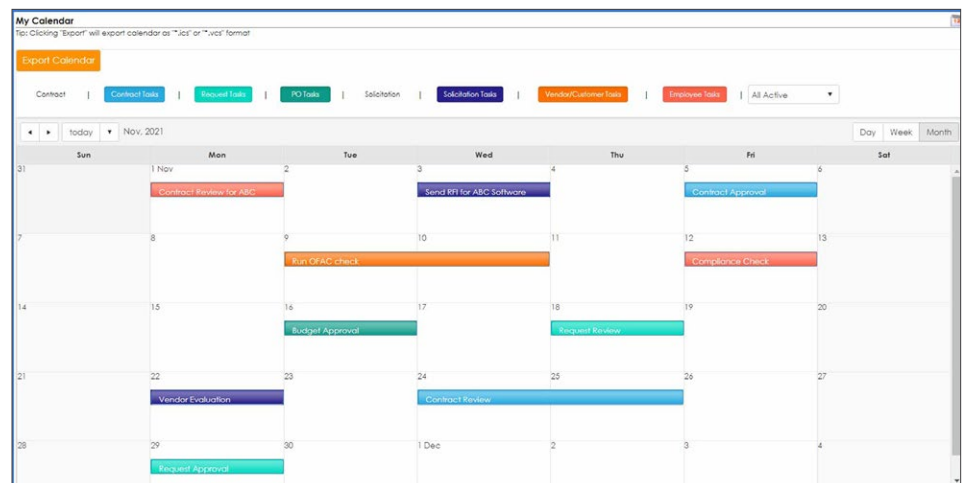
Drafting contracts has been simplified in CobbleStone through the power of several native AI tools. CobbleStone Contract Insight leverages **VISDOM**, its powerful AI engine backed by machine learning that streamlines data insertion, extraction, evaluation, and risk identification. Data entry and extracting critical details like dates, monetary values, and counterparties is automated. VISDOM assesses risk by analyzing document text on a rules-based sentiment. You can upload files and convert requests to contract records

without data loss or re-keying, driving consistency and reducing potential mistakes. Users can also start from scratch, leveraging pre-approved templates and clauses. Team members will have unlimited user-defined fields to accommodate tailored contract details.

CobbleStone’s Auto-Redlining can locate and redline clauses within contract files and recommend modifications based on preferred contract clause versions to standardize terminology, improve consistency, and ensure accurate language. The contract library is entirely configurable for the company’s needs. See *Figure 1 on the previous page*.

IntelliDraft.AI is a generative AI tool for real-life clause search and generation with a user-friendly chatbot interface that searches through thousands of example clauses. Contract teams input key search terms, and IntelliDraft.AI returns relevant results and generates configurable clauses based on your needs. The resulting clause can be copied directly from IntelliDraft.AI. Additionally, users can summarize the language of a clause or generate another clause variation for different versions of the clause.

IntelliXtract identifies and extracts legal terms using natural language processing and recognizes structured data and legal phrases with fuzzy logic matching. CobbleStone’s Theory Calculator provides automated data analysis and on-screen recommendations, enhancing visibility and strategy throughout contract lifecycle administration.



**Figure 2:** My Calendar helps users stay informed about critical contract milestones by displaying contract and task alerts, including expiration dates, review dates, and expiration notification dates.

“IntelliDraft.AI is a generative AI tool for real-life clause search and generation with a user-friendly chatbot interface that searches through thousands of example clauses. Contract teams input key search terms, and IntelliDraft.AI returns relevant results and generates customizable clauses based on your needs.”

### Workflows Tailored to How Your Company Works

Based on request types, data fields, and rules, CobbleStone enables automated workflows for contract approval. Users can approve or reject contract requests directly within the workflow, and automated alerts and notifications ensure timely action on contract events and milestones—eliminating bottlenecks. CobbleStone features a workflow visualizer that shows contract approval expectations, ensuring a team is on the same page. CobbleStone populates key dates, making it easier for team members to meet deadlines, and users can track their obligations using tools such as My Dashboard and My Calendar. See *Figure 2 on the previous page*.

### Analysis Through Powerful Reporting

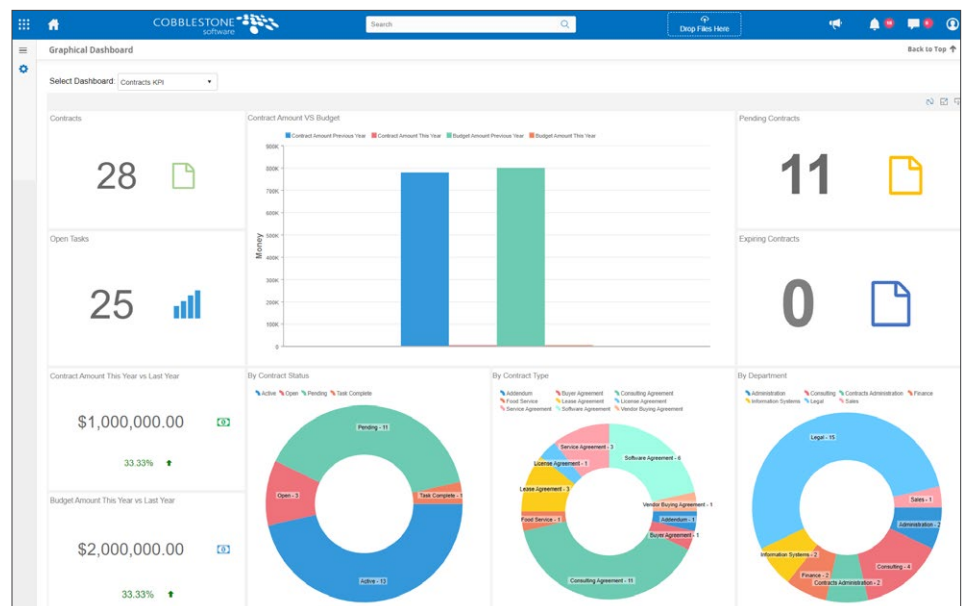
CobbleStone Contract Insight provides comprehensive real-time tracking and reporting features for contract management, enhancing financial visibility and decision-making. Financial tracking assists in budget management by logging payments, income, and other financial transactions and data related to contracts. Companies can configure fields to capture specific information relevant to their business.

Graphical dashboards display key performance indicators (KPI), making the information easily accessible. Financial and

KPI dashboards provide an overview, including budget details and transaction history. Because the dashboards are configurable, users can visualize critical financial metrics, identify trends, and monitor compliance. The contracts KPI dashboard compares current contract performance data to the previous year, displaying contract and budget amounts, contract diversity by department, and contracts expiring within 30 days. The contracts overview dashboard presents an executive summary of contract statistics and highlights contracts assigned to employees, upcoming expirations, and active requests. Contracts can be visualized by department, showing counts, total values, trends, and patterns. These dashboards empower users with essential insights right when they enter the system, promoting efficient contract management. See *Figure 3*.

### Integrations

There are hundreds of plug-and-play interfaces and integrations between CobbleStone Contract Insight and third-party technology solutions. These include integrations with popular tools used by legal teams, such as Adobe Acrobat E-Sign, DocuSign, SignNow, CobbleStone’s own IntelliSign®, and other signature systems, as well as integrations with legal-focused products like issue management, case management, and billing.



**Figure 3:** CobbleStone Contract Insight offers executive graphic dashboards that enhance contract analytics and data-driven decision-making. Users can choose which dashboard to view via a drop-down menu. In this dashboard, users can see contracts by status, type, department, contract values, number of pending or expiring contracts, and open tasks.

## Pricing

CobbleStone [offers multiple pricing options](#) and works with you to review features and help determine the best edition to fit your needs. The entry-level subscription—Express Edition—starts at \$59 per user per month and offers considerable features at a very reasonable price, such as configurable fields, key date notifications, unlimited contract storage, and searching and reporting. The main product—Enterprise Edition—varies in price depending on several aspects, such as the deployment strategy, which offers options for on-premises installation and SaaS/ cloud deployment. CobbleStone also provides unlimited contract storage with named or concurrent user licenses.

## Who is CobbleStone?

CobbleStone's headquarters are in New Jersey, with employees across the USA and offices in Canada, the UK, and Australia, with plans to continue expanding globally.

CobbleStone has offered contract management software for more than 25 years. They serve more than 1,300 clients globally in over 25 industries, including manufacturing, government, banking, healthcare, pharmaceuticals/life sciences, and energy. The corporate legal and procurement departments of Fortune 1000 and mid-market companies comprise the majority of the user base, and the system offers department-wide benefits as well. Enterprise deployments allowing users throughout an organization to submit contracts and see their status via role-based dashboards have become considerably more widespread.

## Why Buy CobbleStone?

- CobbleStone is purposefully built software that simplifies and enhances the entire contract management lifecycle.
- AI functionality is incorporated in multiple processes to improve productivity and save time and money.

- Clients can configure the platform to meet their needs.
- CobbleStone offers significant resources and support and can assist companies in [making a case for Contract Management Software](#).

## See CobbleStone Contract Insight Today!

[Schedule a demo](#) to learn more about how to benefit from CobbleStone Contract Insight or sign up for a [free trial](#). CobbleStone also attends and hosts [a variety of events](#) throughout the year. ■



# Filevine Docs+ and AI Functionality Help You Accelerate Legal Work, Reduce Errors, and Gain Insight

“Text included in photographs or scanned documents can be searched thanks to OCR technology, and material in other file types, such as DOCX, PDF, and RTF, can be quickly detected thanks to document indexing.”

### Company Name Brand

Filevine

### Product Name Brand(s)

Filevine; Docs by Filevine; Periscope by Filevine

### Latest Developments and Updates

- Docs by Filevine, launched in June, provides advanced document management for law firms.
- Medical Timeline streamlines the organization and analysis of medical records within legal cases.
- AI Document Review leverages artificial intelligence (AI) to extract and organize information from legal documents.

### Broad Legal Functionality Supercharged by AI

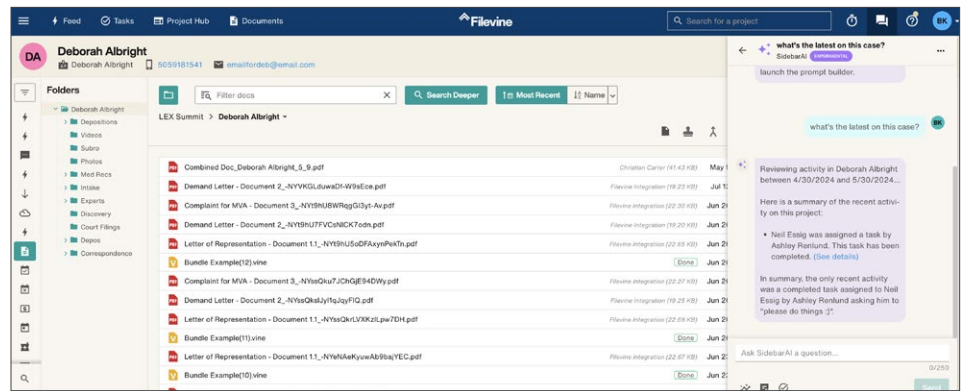
The concept behind Filevine's name is that data grows in a case akin to a vine's leaves. Users can avoid needing to remove Filevine's leaves from several locations and programs by using Filevine to aggregate emails, tasks, documents, and more. Attorneys and paralegals can easily collaborate inside the firm thanks to Filevine's unified platform, giving them access to all their leaves in one location.

Legal teams have simple access to every aspect of their cases thanks to Filevine's user-friendly interface. The platform offers several AI-powered features that streamline workflow, improve collaboration and security, and free up lawyers' time for other essential duties.

### Docs by Filevine

Docs by Filevine is an **advanced document management system** designed specifically for law firms and legal departments. Docs utilizes optical character recognition (OCR) to search for terms within all documents, including PDFs and photos of documents. Its quicker and more accurate search features significantly improve the user experience. Users can easily go to specific document portions using intra-doc search, which identifies crucial information. Text included in photographs or scanned documents can be searched thanks to OCR technology, and material in other file types, such as DOCX, PDF, and RTF, can be quickly detected thanks to document indexing.

Unlimited storage allows a firm to maintain all documents in one place, regardless of size or format. Centralized storage eliminates the need for costly paper



**Figure 1:** Docs by Filevine provides standard organizational features like sub-folders. The differentiator is the embedded AI tools, like SidebarAI (featured in this image). Users can get case summaries by simply asking SidebarAI a question.

“SidebarAI is an AI-driven chatbot that delivers guidance, simplifies circumstances, and quickly answers "how-to" questions. SidebarAI summarizes activity within cases and projects on demand.”

storage solutions, enhancing efficiency. Filevine’s robust security ensures document safety while improving productivity and client satisfaction. Unlimited Storage ultimately means law firms never need to worry about running out of space to upload documents, contracts, and records securely.

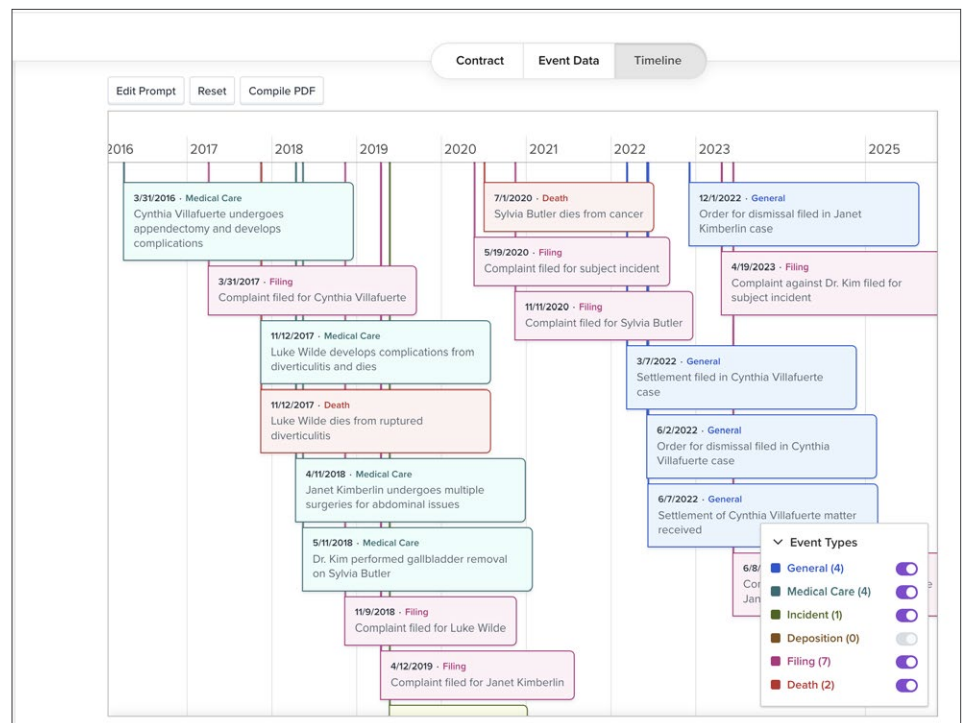
Filevine offers other built-in tools, including conflict checker and PDF editing. Conflict checker scans uploaded documents for potential conflicts, saving time and mitigating ethical risks. PDF editing empowers users to edit PDF files directly within Filevine, including adding text, redacting, highlighting, and collaborating through comments.

Filevine manages documents globally, allowing users to view documents based on flexible criteria, such as recent activity, document modifications, and search functionality. The search feature lets users filter documents by case, tags, document content, and emails. Additionally, every document entering the system is run through an anti-virus scan; positive hits are quarantined, and users are notified.

### AI Functionality

The benefits of AI in legal practice are numerous. Filevine uses AI to automate tasks, provide valuable data insights, reduce costs, identify critical information and inconsistencies, and prioritize security through encryption, access controls, audit trails, and compliance with legal standards. SidebarAI is an AI-driven chatbot that delivers guidance, simplifies circumstances, and quickly answers "how-to" questions. SidebarAI summarizes activity within cases and projects on demand. Once logged into Filevine, a user selects SidebarAI and begins a conversation by simply typing a question about their project or even how to do something in Filevine. SidebarAI searches the project or the Help Center for the relevant information and returns the results. See Figure 1 on the previous page.

Filevine takes AI to another level with its Docs+ application. Manual document review poses a significant challenge for legal professionals because it is a time-consuming process that can lead to errors, especially when dealing with large volumes of information. Human review is prone to error or missing information, which can



**Figure 2:** Visual medical timelines can be generated with a click, organizing medical records and automating the process of breaking down information from each date of service without additional input. Event types can be excluded by toggling preferences. This creates a comprehensive medical chronology across all records for a case and saves both time and money.

“ Based on data analysis, managers can identify efficient workflows, address inefficiencies, and optimize operations. Compare case settlements to understand the factors behind high or low results. Audit reports track user activity, allowing managers to monitor team performance at an individual level.”

have a detrimental effect on case results and customer satisfaction. AI Doc Review harnesses the power of AI to transform legal document analysis. AI Doc Review automates data extraction by quickly identifying and extracting key information from documents, reducing manual effort and the risk of human error. Users gain deeper insights by uncovering patterns, trends, and connections within their documents that might not be immediately apparent through manual review. Efficiency is improved by enhancing the legal document review process, allowing teams to focus on higher-value tasks requiring human expertise. Filevine's AI Doc Review is explicitly designed for the legal industry, ensuring it understands legal documents' unique language and context. It's more than just a time-saving tool; it's a transformative solution that empowers legal professionals with enhanced capabilities.

**DemandsAI** transforms the process of creating demand letters for legal professionals. Compelling demand letters can be crafted in minutes, freeing time to focus on other high-value tasks and exceptional client service. Leverage AI to build stronger arguments backed by relevant facts and precedents.

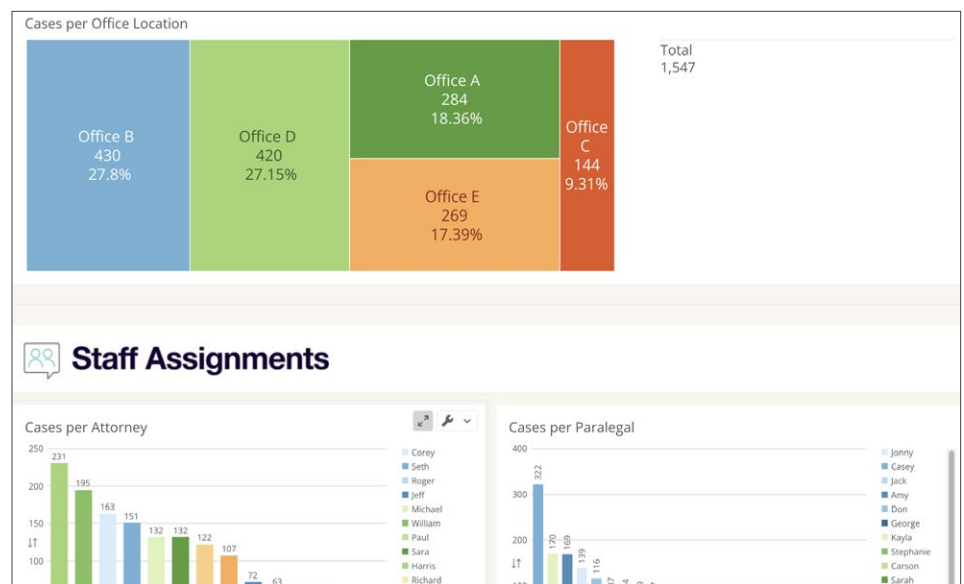
### Medical Timeline

Filevine's medical timeline feature is designed to streamline the organization and analysis of medical records within legal cases. AI-generated medical summaries

are created so teams can review medical records and extract essential details, including chief complaints, medical history, procedural codes, medications, and follow-up instructions. Medical events can be arranged in chronological order and in a clear timeline, making it easier to track the progression of a patient's health. Additionally, team members can fact-check and view source information with embedded links to the original document pages for reference. Users will save time by automating the compilation of medical chronologies, which are crucial for building strong legal arguments. *See Figure 2 on the previous page.*

### Reporting – Up Periscope!

A critical aspect of legal operations is the ability to track financial and organizational information to make data-driven decisions and improve and increase business. **Filevine Periscope™** is a highly configurable and mobile-friendly reporting application with the ability to customize data fields, apply filters for specific case types, and provide data-backed insights into team productivity, workflows, and decision making. Users can export data from Filevine reports into tailored visualizations using Periscope. Based on data analysis, managers can identify efficient workflows, address inefficiencies, and optimize operations. Compare case settlements to understand the factors behind high or low results. Audit reports track user activity, allowing managers to monitor team performance at an individual level. *See Figure 3.*



**Figure 3:** Periscope provides easy access to information, such as individual contributor productivity, arming managers to make data-driven decisions.

## Integrations

In addition to tight integration with Microsoft Office, Filevine offers an open API and plays well with other applications to customize Filevine as a single location for daily tasks. Plugins work in both the desktop and mobile versions. The Outlook plugin enables users to attach emails to cases, add time entries, and manage case-related documents and tasks without leaving the inbox. It also allows users to search for cases and contacts and copy documents and contact information directly from a case to an email and vice versa. The most common integrations include Zapier, Slack, and Google (calendar, Gmail).

## Pricing

All Filevine licenses include unlimited document storage, cloud-based case and task management, scheduled reports, automated workflows, calendaring, team collaboration tools, contact management, guest access, instant email and text communication, enterprise-level security, and powerful integrations. More modules

are offered for an additional cost. For detailed pricing and further information, please contact Filevine.

## Who is Filevine?

Filevine is changing how 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 offers a full suite of custom-built AI-powered solutions with the legal user in mind. Filevine powers 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?

- Deliberate development to streamline and simplify legal work and collaboration, including specific applications to simplify complicated and document-intensive document generation, such as [ImmigrationAI](#).
- Incorporating AI extraction and AI generation steps into the document assembly process saves time and improves accuracy.
- Best-in-class security and unlimited storage.
- Multiple customer support options, including live help and expert teams.
- Ongoing new feature development to smooth out the process of document assembly and legal workflows.

## See Filevine Today!

[Schedule a demo](#) to learn how Filevine's unlimited storage can benefit any company! And read a case study to discover how one firm [solved its storage woes](#) with Docs+ by Filevine. ■

# Practice Management

## C^RET Legal

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



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



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



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

## PHILIPS

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



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



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



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

# 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.

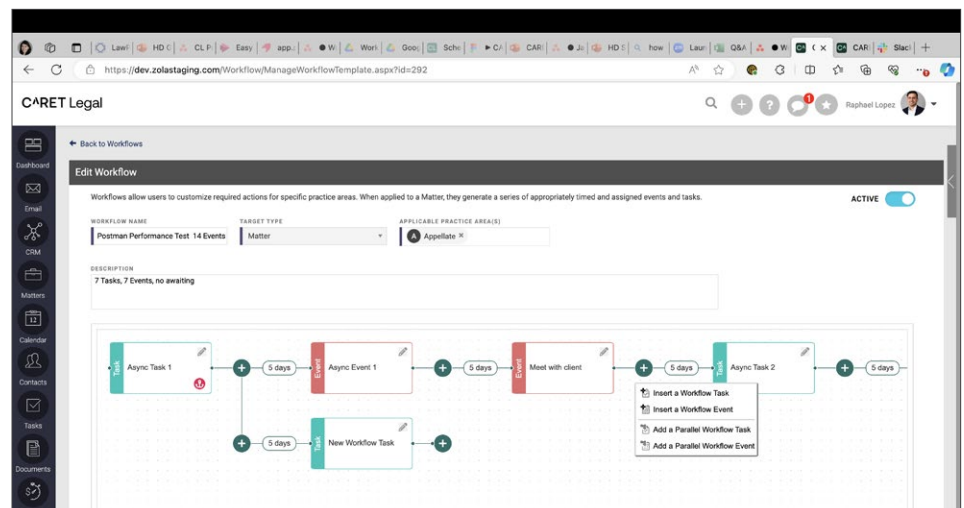
- AI-enabled Quick Summary provides firms with concise document summaries, allowing them to quickly grasp the main points, critical insights, and key takeaways of a document or set of documents.

### 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.

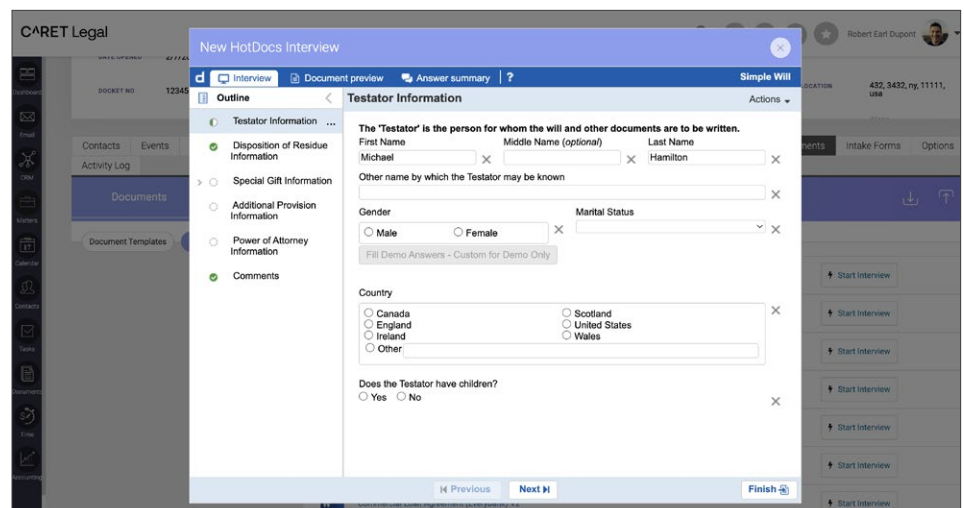
### Document Management, Automation, and Quick Summary

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

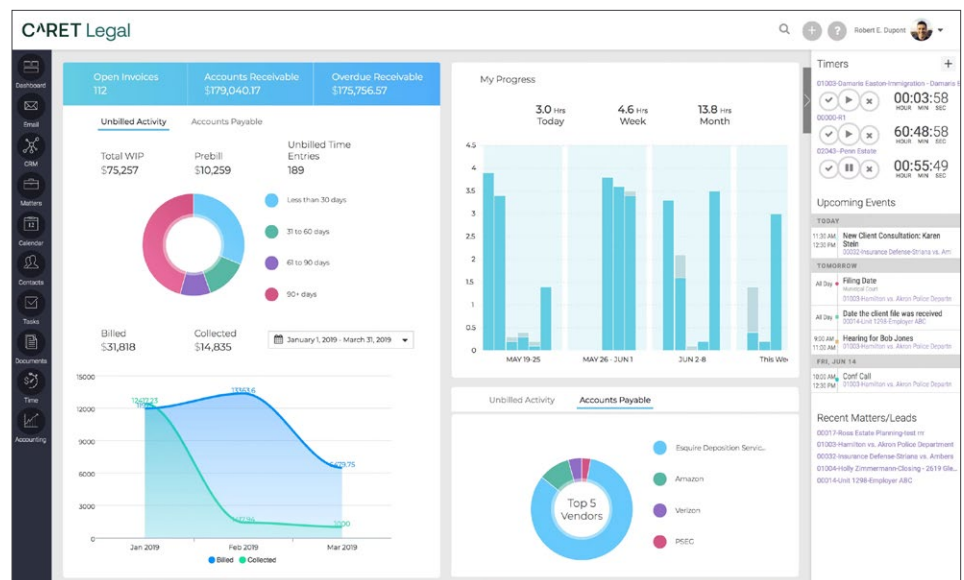


Figure 3: The admin dashboard provides a dynamic and customizable view of the firm’s finances.

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](http://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](http://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**

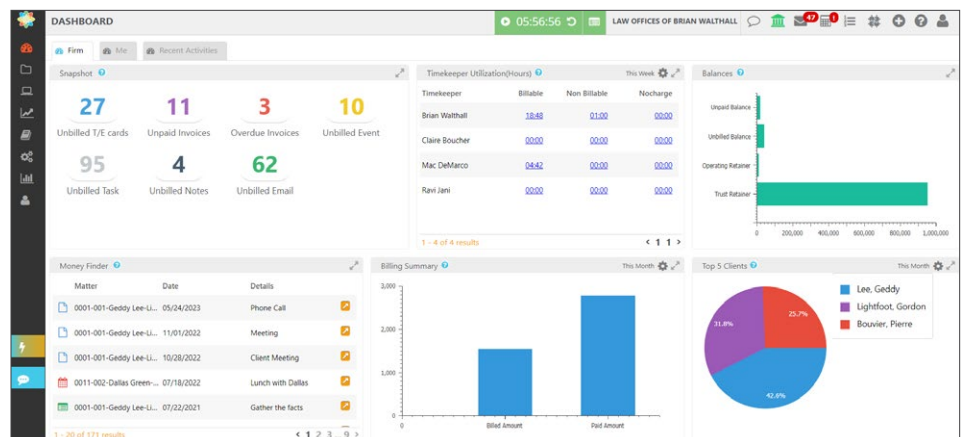
- SMS messaging is available to send invoices; firms can include a payment link, reminders, retainer requests, and general two-way communication.
- Split Billing is a helpful tool for those representing multiple parties that share the responsibility of paying for legal fees by defining what parties are 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.

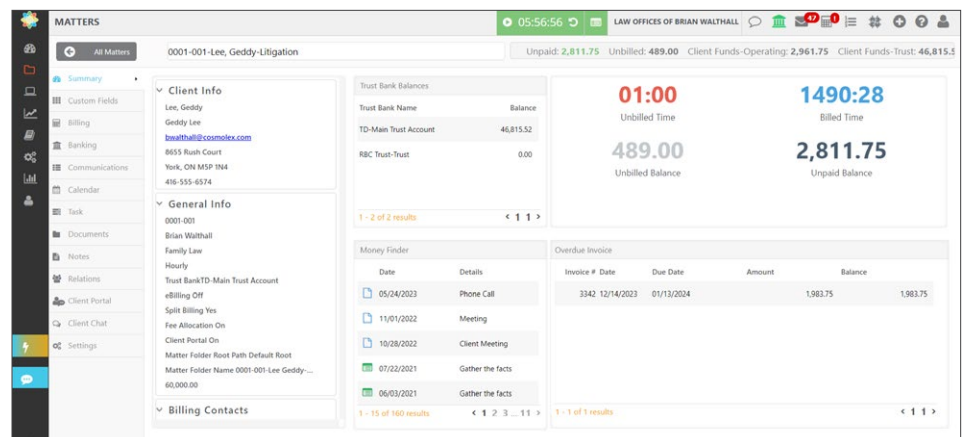
Users can examine information related to a specific matter by selecting it to access the Matter page. View general billing information pertaining to the case and use the navigation panel to find documents, tasks, or calendar activities. This centralized approach eliminates the need for multiple applications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

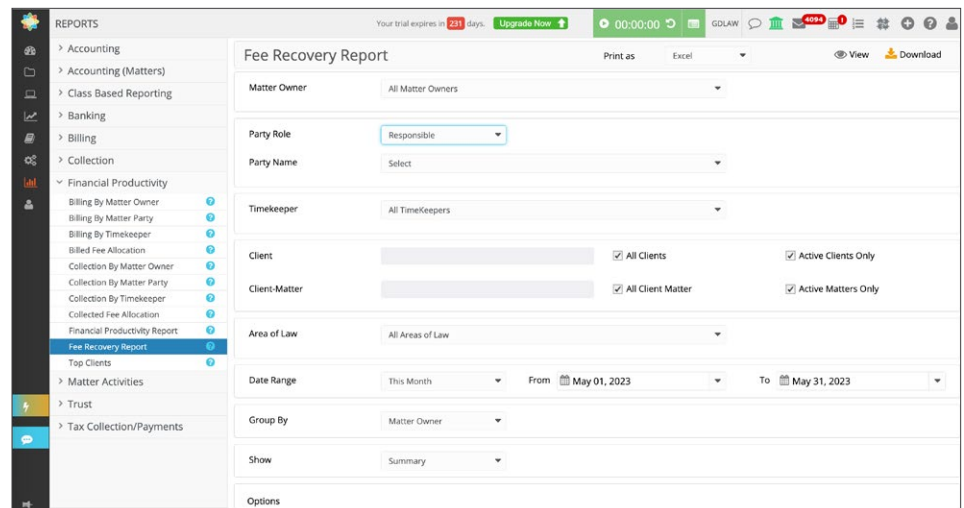
adjustable design to tailor the application to the specific demands of a firm. NextGen features include user-adjustable views to filter, sort, and change the columns of any data table. Configurable dashboards display the data that matters most to a user, and stored views enable users to access their 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'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**

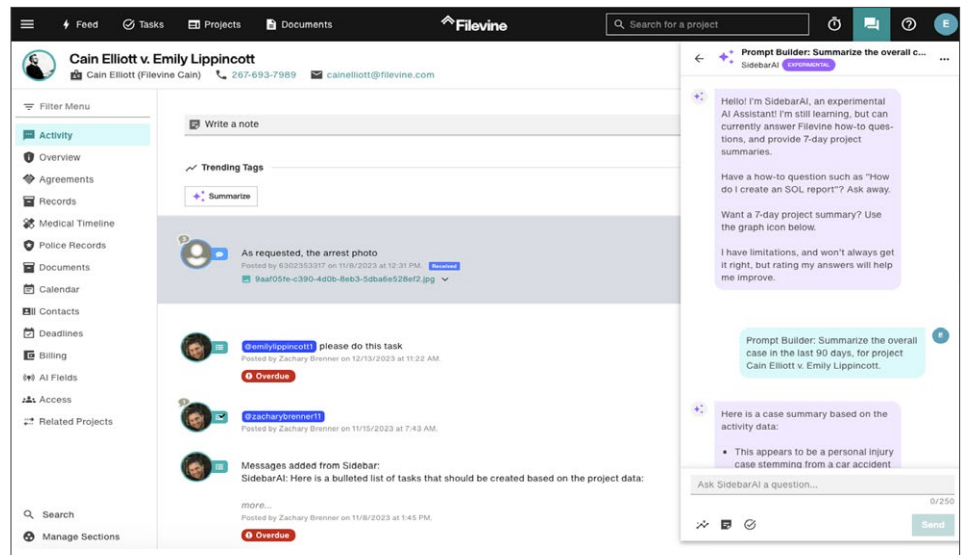
- The first step toward providing Filevine users with an AI virtual assistant tool is SidebarAI. The support tool offers summaries of the most recent developments in a case project and responds to “how-to” queries to assist users in navigating the Filevine platform.
- AIFields helps law firms looking 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

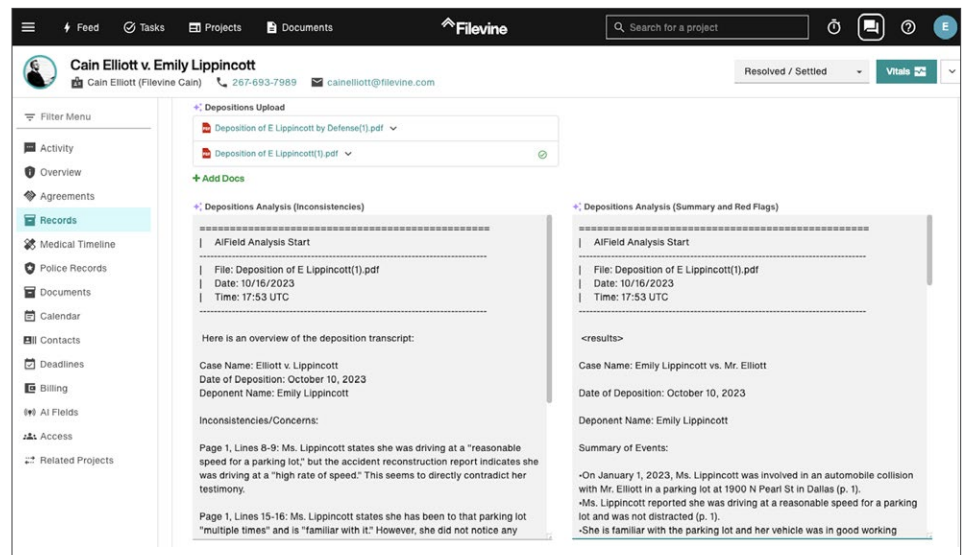
A firm can customize workflows inside Filevine to follow its procedures for every stage of a project or case, ensuring no processes are overlooked. Filevine can use each job to start a workflow's subsequent task. For instance, an engagement letter is generated and made available for the user to edit 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,

The screenshot shows the ImmigrationAI interface for creating a filing. It features a sidebar with navigation options like 'Create Filings', 'Filings', 'Users', 'Form Bundles', 'Settings', and 'Log Out'. The main content area is titled 'Create Filing' and includes a 'Document Intake' section with a table for profiles. Below this is a 'Conflict Profile' section for 'Alien Catala Figueredo (Foreign National)'. The form is split into two columns: 'Empty' and 'Foreign Passport'. Each column has radio buttons for selecting values for various fields: Last Name, Middle Name, First Name, Date of Birth, Nationality, Sex, Issued On, Expiration Date, Passport Number, and Birth City. A 'Save & Next' button is visible at the bottom right.

**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. ■



# 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.”

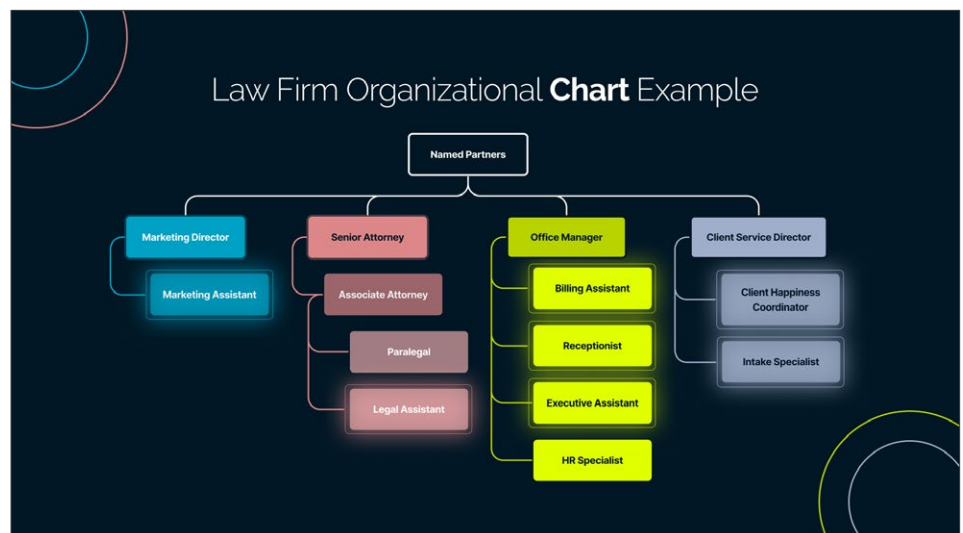
**Company Name Brand**  
Get Staffed Up

**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	<b>\$2,145</b> <small>\$1,459</small>
Billing Clerk	\$4,670	<b>\$2,145</b> <small>\$2,525</small>
Legal Assistant	\$4,217	<b>\$2,295</b> <small>\$1,922</small>
Receptionist	\$3,288	<b>\$1,995</b> <small>\$1,293</small>
Marketing Assistant	\$4,425	<b>\$2,295</b> <small>\$2,130</small>
<b>TOTAL</b>	<b>\$20,204</b>	<b>\$10,875</b> <small>Total Saved: \$9,329</small>

**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.

# 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

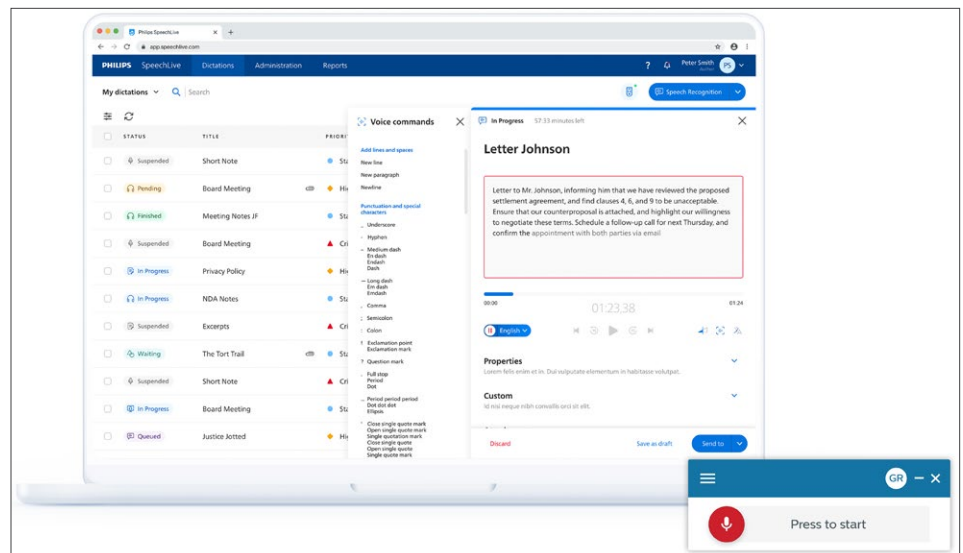
Philips SpeechLive is a web-based dictation and transcription workflow solution that empowers you to turn your voice into text

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.*

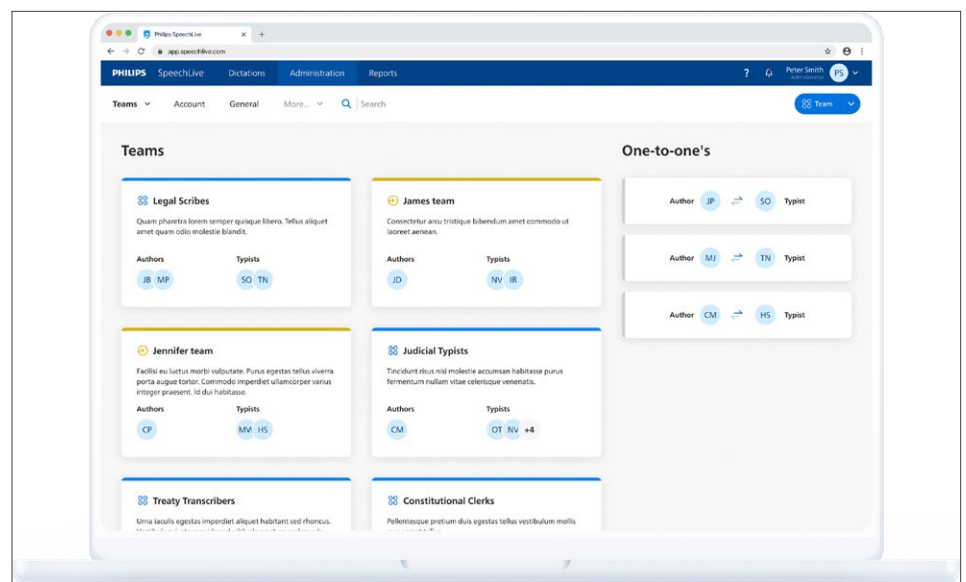
Unlike most speech-to-text engines that are speaker-dependent, SpeechLive also offers multi-speaker speech recognition. When you select the speech-to-text function for dictation, SpeechLive prompts you for the language and the number of speakers. The function uses artificial intelligence (AI) to identify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

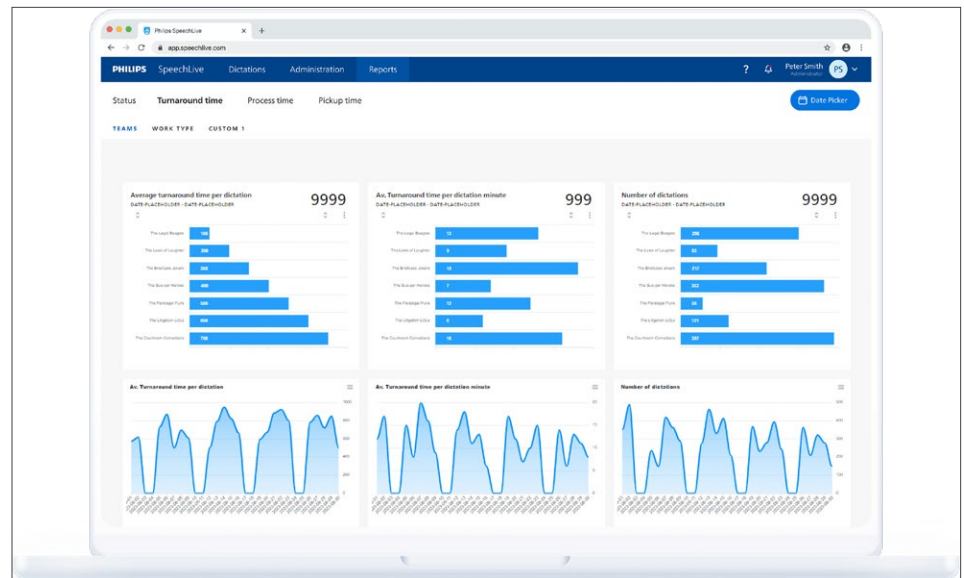
### Administering SpeechLive

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'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**

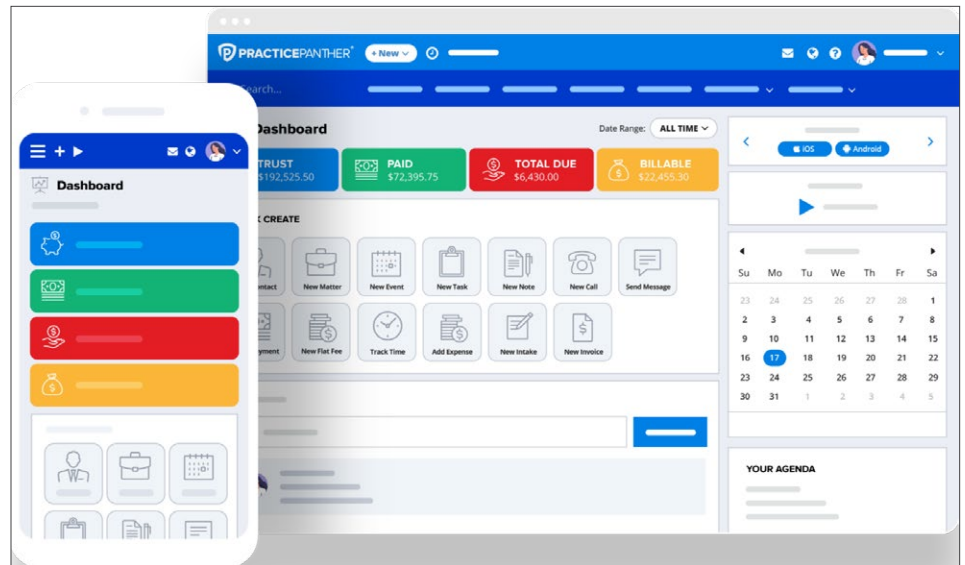
PracticePanther is an all-in-one legal practice management (LPM) software-as-a-service (SaaS) that law firms can customize and design to fit one or more practice areas. No third-party software is required as PracticePanther includes built-in workflows, document templates, time tracking, billing,

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

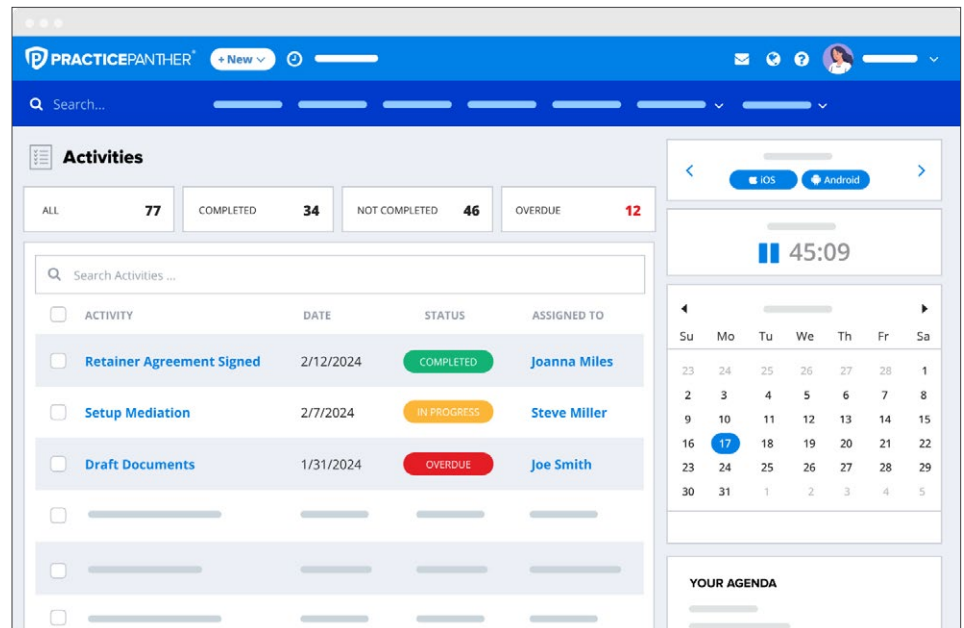
configured with custom fields to only view and work with information specific to that practice area. For example, a personal injury case may have fields for medical liens, settlements, incident dates, and doctors for a case. Other cases, like bankruptcy, will have fields specific to that case type, such 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)**

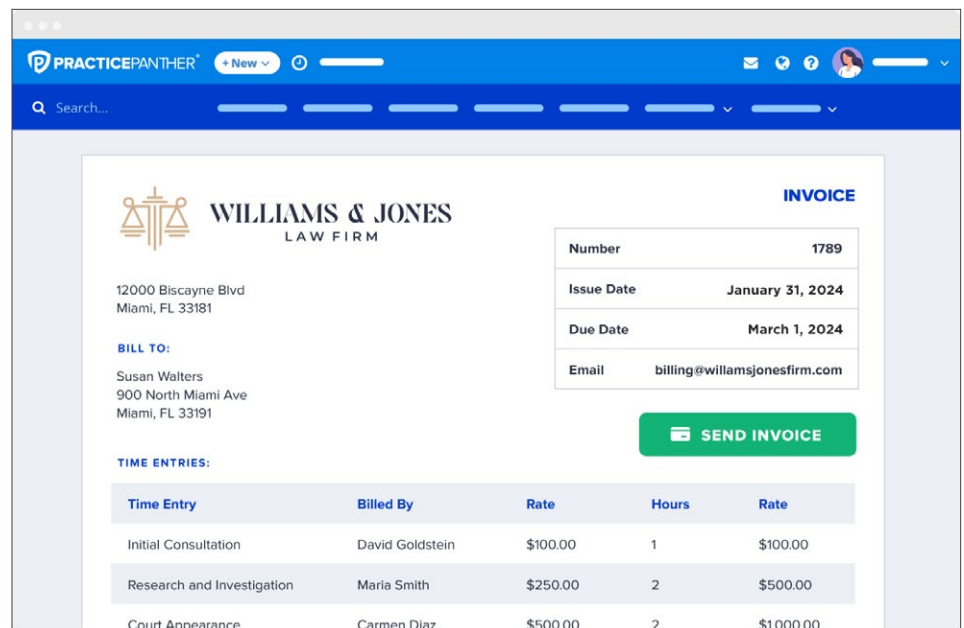
PracticePanther supports three methods to enter time:

- 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 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**

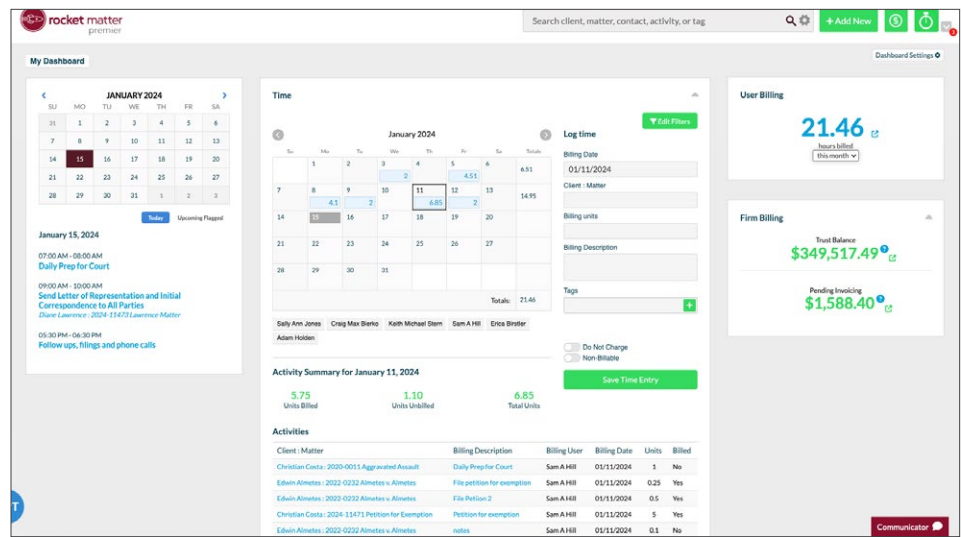
Rocket Matter is a law practice management (LPM) Software-as-a-Service (SaaS) provider, part of ProfitSolv’s software suite for professional service organizations. Since ProfitSolv acquired Rocket Matter in 2020, it has enhanced and added functionality to

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

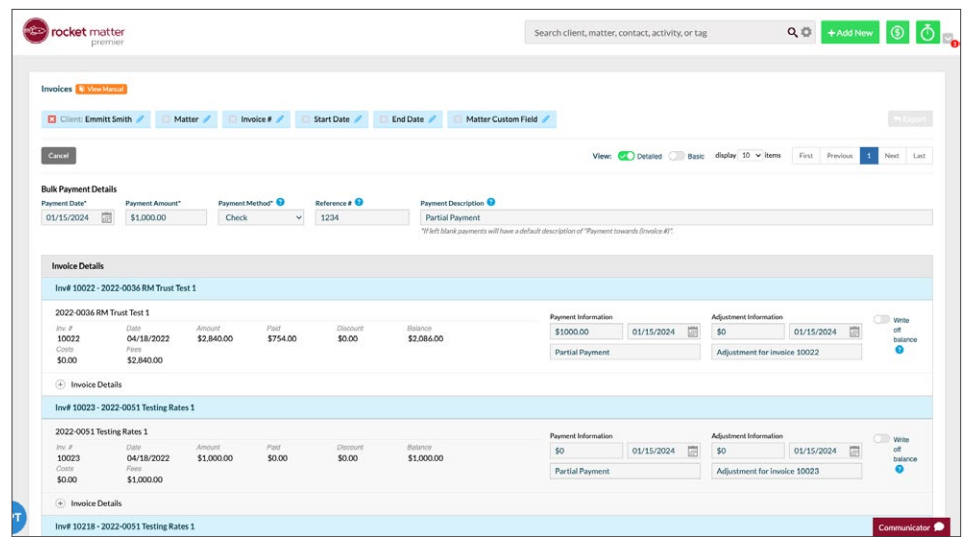


Figure 2: The Rocket Matter batch billing interface provides access to review, edit, and generate invoices.

# “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

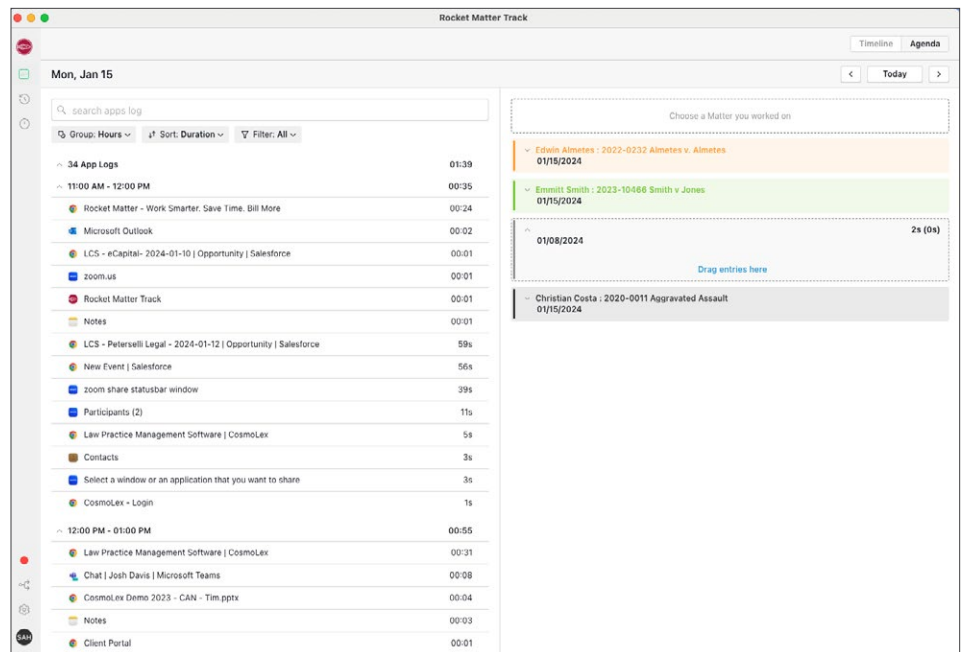


Figure 3: Rocket Matter Track, an automated time tracking system, frees you from spending time on time tracking and reports on how you spend time each day.

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!](#)



# 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.”

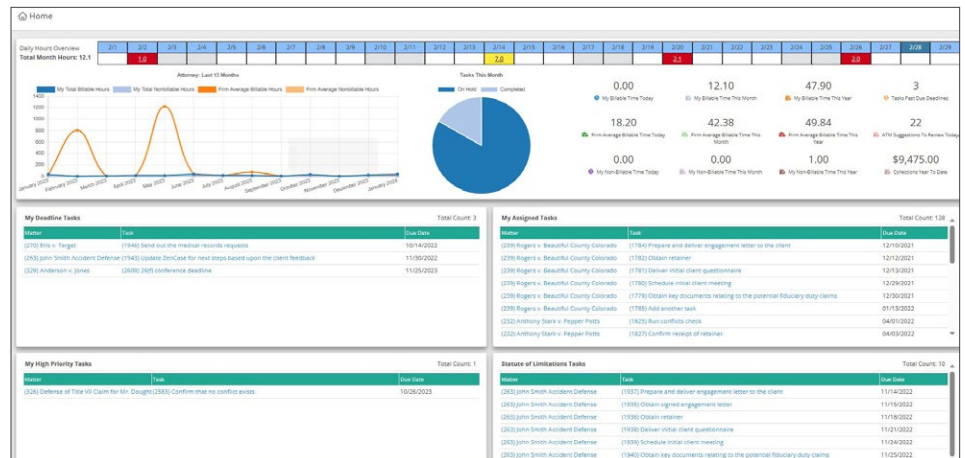
- Company Name Brand**  
Groundswell Productivity Solutions, LLC, d/b/a ZenCase
- Product Name Brand(s)**  
ZenCase
- Latest Developments and Updates**
  - Use generative AI (artificial intelligence), ZenGPT, which incorporates ChatGPT, to create documents and conduct legal research to save time and 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

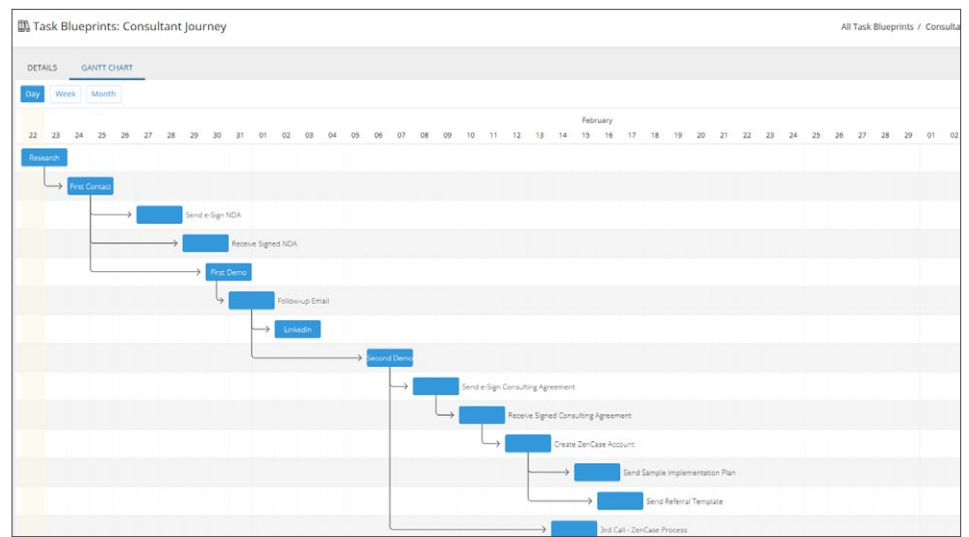
ZenCase **brings all matter data into focus**, including related material and contacts, without creating information overload. A matter summary is displayed across the top of the UI, including matter name, number, originator, manager, client, status, and matter type, with a separate tab presenting summary 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.*

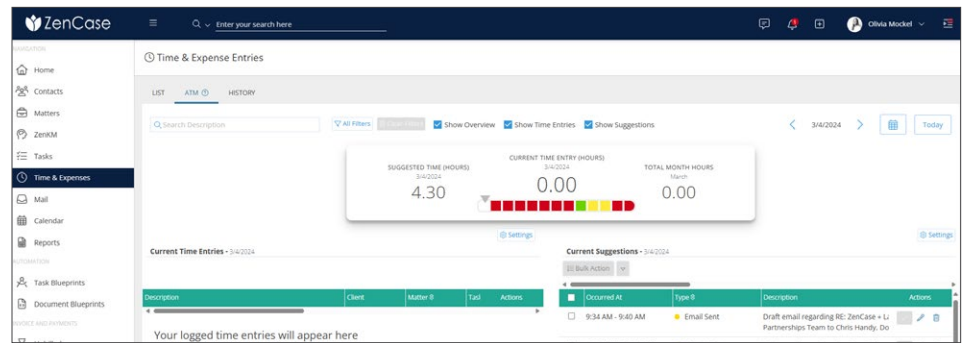
### Time, Billing, and Accounting

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.](#)

# Time, Billing and Payments



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



Efficiency Unleashed: Navigating Time  
and Billing with Filevine



From Time Tracking to Invoicing: How  
TimeSolv Transforms Legal Practice

# Tabs3: A Trusted Legal Tech Suite for Smarter Practice Management

“ The Pre-Bill feature streamlines the billing process by allowing firms to generate draft statements that can be digitally reviewed, edited, and approved within the system before finalizing. Each pre-bill is assigned to authorized reviewers who can make changes, add comments, or mark it as ready—all without printing or emailing documents.”



**Company Name Brand:**  
Tabs3 Software

**Product Name Brands:**  
Tabs3 Cloud      Tabs3 Billing  
PracticeMaster    Tabs3 Financials  
Tabs3Pay          Tabs3 CRM  
Tabs3 Websites

## Latest Developments and Updates

### Enhanced Pre-Bill Tracking:

Users can drill down directly from the interface to see the contents of a pre-bill and make edits, add new fees, and more.

### CRM and Messaging Enhancements:

PracticeMaster now offers more streamlined client communication and marketing tools.

### Tabs3Pay Upgrades:

Clients can choose from additional electronic payment options including Google Pay, Apple Pay, Venmo, and PayPal, even Pay Later.

### Improved Document Preview in PracticeMaster:

Save time by viewing documents without having to open a full document record.

## What Sets Tabs3 Apart?

Legal professionals require more than basic billing tools. They need systems that unify daily workflows, client communication, financial oversight, and compliance management. Tabs3 meets that challenge with a tightly integrated suite that is purpose-built for the legal industry. Whether streamlining time entry, simplifying document creation, or reducing trust accounting risks, Tabs3 aims to improve productivity and profitability. Its legal-specific features, combined with automation and mobile access, offer a powerful toolkit for firms of varying sizes.

What sets Tabs3 apart is its deep integration across modules and thoughtful design. Attorneys can capture time from multiple sources, manage payments and trust accounts

confidently, and access critical information from anywhere using mobile tools. With built-in automation, dynamic dashboards, and seamless Outlook integration, Tabs3 simplifies daily tasks while empowering firms to make smarter, data-driven decisions. It's a solution built for the unique demands of the legal industry that is scalable, secure, and tailored to how law firms work.

Tabs3 presents a compelling platform for legal firms aiming to unify and modernize operations without sacrificing reliability or compliance.

## Time Capture

A wide range of features are incorporated in Tabs3 to streamline law firm operations, starting with a flexible time entry system. Attorneys and staff

“ Tabs3Pay enables secure electronic payments with customizable links and guided onboarding, making it easy for firms to start accepting payments quickly and professionally.”

can record billable time in several convenient ways, including manual entry, built-in timers, and batch input for high-volume entry. Time can also be captured directly from calendar appointments or emails, reducing duplication and increasing accuracy. These options make it easy for users to log time in the way that best fits their workflow, whether in the office or working remotely.

## Dashboards and Reporting

Dynamic dashboards such as the Matter Manager provide real-time visibility into key metrics: billable hours, work-in-process, and trust balances. Attorneys can view pertinent dashboards showing billable hours, recent activity, and collections, while firm administrators can monitor financial performance, aging receivables, and payments.

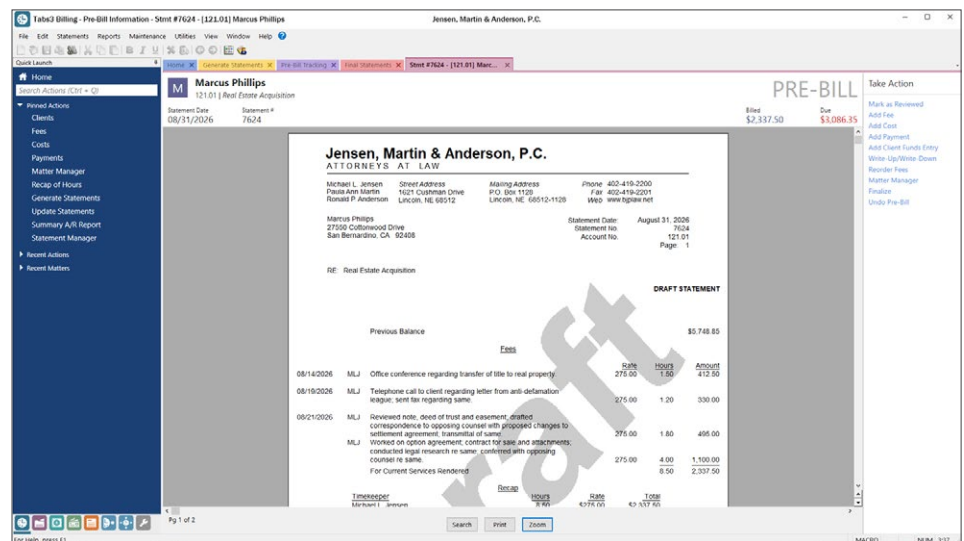
## Pre-Bill

The Pre-Bill feature streamlines the billing process by allowing firms to generate draft statements that can be digitally reviewed, edited, and approved within the system before finalizing. Each pre-bill is assigned to authorized reviewers who can make changes, add comments, or mark it as ready—all

without printing or emailing documents. This workflow reduces errors and delays and locks down transactions to prevent unauthorized revisions, ensuring billing accuracy and accountability. See *Figure 1*.

## Payments and Expenses

Managing payments and expenses is equally efficient with Tabs3’s check request functionality. Users can submit check requests directly within the system, linking them to specific matters or vendors. The process supports approval workflows, ensuring that all disbursements are reviewed before being issued. For recurring expenses, such as rent or subscriptions, you can automate payments, and all transactions are seamlessly integrated with the Tabs3 Financials module for consistent accounting and reporting. [Tabs3Pay enables secure electronic payments](#) with customizable links and guided onboarding, making it easy for firms to start accepting payments quickly and professionally. Payment options include ACH, credit card, Google Pay, Apple Pay, Venmo, and PayPal, including Pay Later. Payment enhancements continue to be added. Sharing a real-world example, a case study [illustrates how Tabs3Pay can improve cash flow](#).



**Figure 1:** Tabs3’s Pre-Bill feature centralizes draft review in a secure, digital workspace tailored for law firm workflow. Authorized users can collaborate on billing edits in real time, adding notes or approvals directly within the system. By minimizing manual handling and locking down revisions, firms maintain control and precision across every billing cycle.

“ Attorneys can view pertinent dashboards showing billable hours, recent activity, and collections, while firm administrators can monitor financial performance, aging receivables, and payments.”

## Trust Accounting

Trust accounting is a critical area for law firms, and Tabs3 handles it with precision. Each client's trust funds are maintained in separate ledgers, and the system includes safeguards to prevent overdrafts or unauthorized disbursements. One of the standout features is support for three-way reconciliation, ensuring the trust ledger, bank statement, and general ledger are all in sync. This level of oversight is essential for compliance with bar association rules and provides peace of mind during audits.

## Mobile Access

For attorneys on the move, Tabs3 Cloud is the best way for firms to access all the features in Tabs3 Billing, Financials, PracticeMaster, and Tabs3Pay from anywhere with an internet connection. For quick and secure access to key features, use Tabs3 Connect on any mobile device. Users can log time, view client and matter details, check calendars, and access documents from any device. This mobile functionality ensures that attorneys remain productive and connected, even when away from their desk. See Figure 2.

## Automation

Automation is another area where Tabs3 excels. The platform supports recurring time and expense entries, automated document generation using templates, and workflow triggers to send reminders or initiate tasks based on specific events. These automations reduce manual work and help ensure that important deadlines and processes are consistently followed.

## PracticeMaster

PracticeMaster acts as the central hub for managing client and case data. It includes tools for calendaring, document tracking, and conflict checking. Task management and calendaring features include a robust system for scheduling, reminders,

and deadline tracking. Tasks can be linked to specific matters, and shared calendars improve visibility across the firm. The system also supports rules-based scheduling, which automatically calculates deadlines based on court rules or internal policies, helping firms stay compliant and organized. PracticeMaster's Matter Manager also provides a centralized financial snapshot for each case, including accounts receivable, work-in-process, and trust balances. The interface displays recent activity and payment history, giving attorneys a clear, real-time overview of matter-specific transactions to aid in billing and trust management.

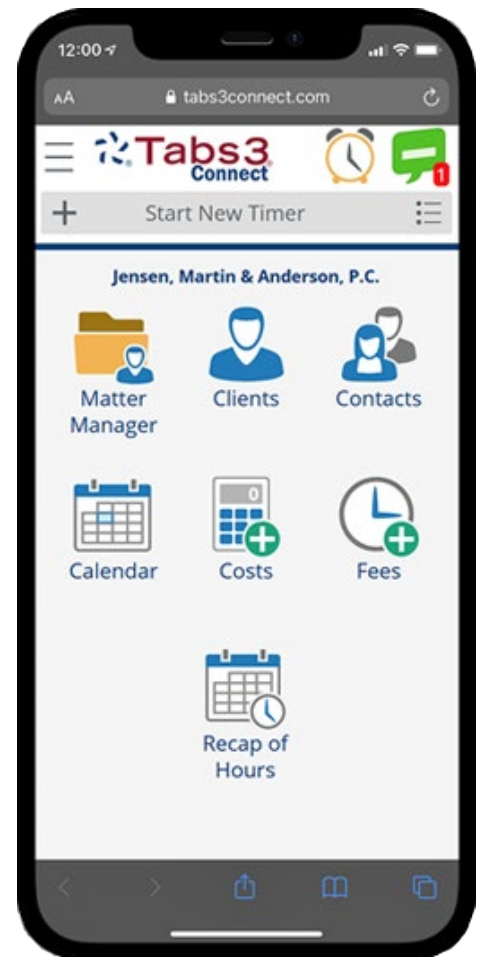


Figure 2: Tabs3 Connect's mobile dashboard organizes core functions into intuitive icons, allowing attorneys to access matters, log time, and check calendars with just a few taps. The streamlined interface supports real-time updates and productivity on the go, making it ideal for fast-paced legal environments.

# Document Management and Assembly

Tabs3, through its PracticeMaster module, offers a powerful document management system helping law firms organize, store, and retrieve documents with ease. Every document, whether a contract, pleading, or internal memo, can be linked directly to a client or matter, ensuring that all relevant files are accessible from a single location. This centralized approach reduces the risk of misplacing important documents and improves collaboration across the firm. See Figure 3.

Using customizable templates, firms can generate standard legal documents, such as engagement letters, fee agreements, or court forms, by automatically merging client and case data stored in the system. This saves time, reduces errors, and ensures consistency across firm communications. The document assembly feature is especially valuable for firms that handle high volumes of similar documents, as it streamlines production and enhances professionalism.

# CRM for Client Intake and Engagement

Tabs3 CRM is a **client relationship management (CRM) system** integrated within PracticeMaster, that empowers law firms to manage every phase of the client journey, from initial intake to post-engagement follow-up, with strategic precision. Attorneys and staff can automate reminders, assign tasks, track lead sources, and segment outreach for targeted marketing efforts. The platform supports campaign management and engagement tracking, enabling firms to improve retention through personalized service and timely communication. Whether sending follow-up messages, organizing client records, or launching outreach initiatives, Tabs3 CRM streamlines relationship management and ensures no opportunity slips through the cracks.

# Outlook Integration

Seamless integration with Microsoft Outlook streamlines communication and scheduling across platforms, enabling law firms to synchronize emails, calendar events, and contacts with PracticeMaster. This two-way sync ensures client correspondence, court dates, and internal meetings are automatically captured

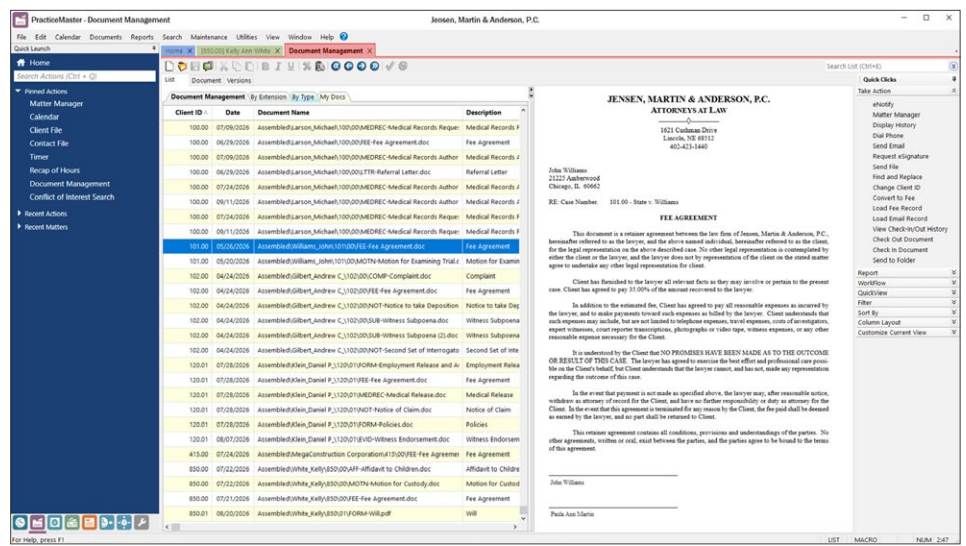


Figure 3: PracticeMaster's Document Management Preview displays documents in the interface, allowing you to easily view multiple documents and find the information you need quickly and efficiently.

and associated with specific matters, eliminating manual tracking and reducing the risk of missed deadlines. Users can directly link Outlook emails and appointments to case files, maintaining a complete and organized history of client interaction. The result is a more efficient workflow, better schedule management, and a clear audit trail that supports accountability while enhancing client service.

**Additional integrations** further extend and enhance the ability to keep all your data connected and consistent.

## Security Overview

Tabs3 incorporates comprehensive, multi-layered security features in Tabs3 Cloud to safeguard sensitive client and firm data across its legal practice management ecosystem. User access is tightly controlled through customizable profiles and password-protected IDs, allowing firms to define permissions for specific software modules and menu options. Secure client designation adds another layer of protection for confidential matters. Tabs3 also supports encrypted file sharing via LexShare integration, which offers bank-level security for transmitting documents between attorneys and clients, even in remote work settings. The system maintains detailed audit trails and facilitates secure eSignatures with LexSign, helping firms meet ethical and regulatory obligations while minimizing the risk of data breaches. These built-in protections ensure that law firms can operate confidently in an increasingly complex cybersecurity landscape.

## Pricing

Tabs3 pricing is based on the number of users and selected features. Firms can choose between a **[Tabs3 Cloud subscription](#)** or an OnSite subscription. Visit **[Tabs3.com/pricing](#)** to find price calculators.

## Who is Tabs3 Software

Tabs3 Software is part of ProfitSolv, a collection of best-in-class software solutions for professional services firms, allowing the freedom for growth and innovation. Using a product-centric and customer-first approach, ProfitSolv collaborates with firms to offer better client services. Tabs3 headquarters are in Lincoln, Nebraska, and they have been a long-standing provider of legal software solutions. They support thousands of law firms across the U.S. with a mission to deliver reliable, integrated tools that help legal professionals run more efficient and profitable practices.

Tabs3 Software offers a dependable, easy-to-use, seamlessly integrated suite of products that help small to mid-sized law firms become more organized and productive. Flexible solutions include legal billing, practice management, accounting, payment processing, CRM, and website services. Tabs3 products are designed with security and advanced performance in mind and are trusted by tens of thousands of legal professionals who use them daily.

## Why Use Tabs3

### **All-in-One Legal Suite:**

Combines billing, accounting, practice management, and more in one easy-to-use platform.

### **Flexible Deployment:**

Cloud and desktop versions are available to suit varying firm needs.

### **Compliance-Focused:**

Built-in tools for trust accounting and conflict checks.

### **User-Friendly Design:**

Designed specifically for legal professionals with a minimal learning curve.

### **Reliable Support:**

Backed by decades of experience and a strong customer support team.

## Find Out How Tabs3 Can Transform Your Law Firm

Choose from Tabs3 Cloud, hosted or on-premises server options, including outstanding U.S.-based support. **[Schedule a personal demo](#)** to explore how Tabs3 can empower your team and learn more at [Tabs3.com](#).



# Efficiency Unleashed: Navigating Time and Billing with Filevine

“Users can switch between clients and projects seamlessly, ensuring accurate time entries. Time can also be tracked directly from email, eliminating the need to toggle between applications.”

**Company Name Brand**  
Filevine

**Product Name Brand(s)**  
Filevine

**Latest Developments and Updates**

- Recently unveiled Payments by Filevine is a potent in-house tool that functions as the cornerstone of the platform for payments, billing, and timekeeping.
- When emailing a single invoice, there is now an option to include oneself in the CC field. Previously, bulk emailing was the only way to do this.
- Project fund debits, deposits, and payment records now have ACH as an integrated payment option.
- Trust handling and automatic payments from project (individual case) funding.
- Filevine plans to introduce a public API for Filevine payments in the near future, along with unique payment links for every project.

**Your All-in-One Legal Tech Solution**

Managing cases, documents, and billing can be a complex juggling act. Filevine is an all-in-one solution designed to simplify legal workflows. As a unified platform, Filevine is more than just a case management tool; it's a comprehensive legal tech stack. From document management to timekeeping and billing, Filevine brings everything under one roof. Filevine's client portal facilitates communication and transparency. Filevine's timekeeping features allow legal teams to track billable hours seamlessly, whether at their desk or on the go.

**Timekeeping**

There are several ways for users to track their time in Filevine. Filevine integrates time tracking directly into calendar events. When creating a new event in the project calendar, a user can select Add Time-Tracking Details, choose billing codes, mark entries as billable and chargeable, and even set draft status for review. When

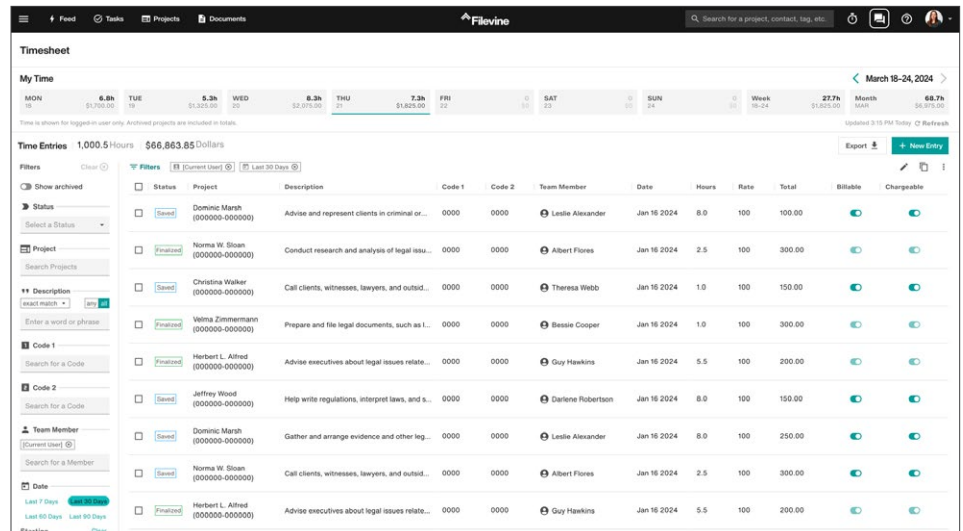


Figure 1: Filevine makes it easy to enter and track time. The timesheet view provides each user a comprehensive look at how they spend their time, on which matters, and the overall value to the firm. Users can easily filter this view or add a new entry.

“ Firms can set up billing preferences in Filevine, like rate schedules for different team members, and assign rates based on roles, experience, or tasks. These preferences can be set firm-wide or per client. Invoice templates can be customized to match the firm’s branding by uploading an invoice design or modifying the default template provided by Filevine.”

attendees are added to the event, each attendee can have individual time tracking associated with it. The event creator clicks on the clock icon next to an attendee’s name to add time entries.

Filevine’s billing timer widget simplifies time tracking. Users can manage interruptions effortlessly because only one timer runs at a time while others remain paused. Users can switch between clients and projects seamlessly, ensuring accurate time entries. Time can also be tracked directly from email, eliminating the need to toggle between applications.

Team members can access their timesheet by clicking the bar graph icon or selecting Timesheet from the main menu dropdown. The timesheet displays time totals at the top and lists recent time entries in reverse chronological order. Users can review, edit, and manage their time entries conveniently.

Whether attorneys, paralegals, or other team members, intuitive timekeeping is built into the platform so timekeepers never miss a billable minute. Users can track time seamlessly within their case management system, eliminating the need for separate tools or manual entries.

As team members work through their day, they can have multiple timers for a matter and perform tasks billed at different rates. Once a timekeeper is done for the day, they finalize the timers, which become

time entries that will 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 1 on the previous page.

### Billing and Payment

Filevine streamlines the billing process for law firms. Firms can set up billing preferences in Filevine, like rate schedules for different team members, and assign rates based on roles, experience, or tasks. These preferences can be set firm-wide or per client. Invoice templates can be customized to match the firm’s branding by uploading an invoice design or modifying the default template provided by Filevine. Firms can also configure additional settings, such as enabling email delivery or creating LEDES-compatible invoices. Payment terms can be set, such as net 30 or 60 for clients at both the organization and project levels. Billing codes, such as LEDES codes, can be defined to categorize time entries and expenses for consistency and compliance. Code descriptions can be customized and assigned to relevant billing items. Firms can control who can view rate schedules within their organization, granting rate-viewing permissions to specific users and ensuring transparency while maintaining privacy.

Filevine allows firms to create invoices directly within the platform. Users navigate to a matter or client, click the Invoices tab, and select New Invoice. A user chooses the appropriate time entries, expenses, and other billable items to include in the invoice.

Pending		Completed	
\$8,492.48		\$37,273.30	

Date	Payor	Account Name	Reference ID	Invoiced	Received	Description
02/08/2024	Wade Warren wade@trustedadvisors.com	Operating Account	267400	(\$1,510.49) ✓	(\$1,510.49)	Payment succeeded
02/10/2024	Eleanor Pena epena@gmail.com	Trust Account	558612	\$4,339.00 ✓	\$3,775.36	Batch fee for payment fees
02/10/2024	Cameron Williamson cwilliamson@trustedadvisors.com	Operating Account	651535	\$6,039.47 ✓	\$6,039.47	Payment succeeded
02/12/2024	Dianne Russell drussell@mylaw.com	Trust Account	267400	\$9,305.55 ✓	\$2,592.22	Batch fee for payment fees
02/18/2024	Brooklyn Simmons bsimmons@mylaw.com	Operating Account	487441	\$3,903.66 ✓	\$3,903.66	Payment succeeded
02/20/2024	Robert Fox rfox@trustedadvisors.com	Operating Account	558612	\$2,731.62 ✓	\$2,731.62	Batch fee for payment fees
02/25/2024	Marvin McKinney mmckinney@gmail.com	Operating Account	651535	\$3,900.18 ✓	\$1,000.00	Payment succeeded
02/27/2024	Verna Digion vdigion@trustedadvisors.com	Trust Account	449003	\$4,048.49 ✓	\$4,048.49	Batch fee for payment fees
02/28/2024	Dr. Ismael Tromp drismaeltromp@mylaw.com	Operating Account	655318	\$5,413.13 ✓	\$5,413.13	Payment succeeded
02/08/2024	Cameron Williamson cwilliamson@trustedadvisors.com	Trust Account	449003	(\$1,510.49) ✓	(\$1,510.49)	Batch fee for payment fees
02/10/2024	Dianne Russell drussell@mylaw.com	Operating Account	655318	\$4,339.00 ✓	\$3,775.36	Payment succeeded
02/10/2024	Brooklyn Simmons bsimmons@trustedadvisors.com	Trust Account	487441	\$6,039.47 ✓	\$6,039.47	Batch fee for payment fees
02/25/2024	Marvin McKinney mmckinney@gmail.com	Operating Account	651535	\$3,900.18 ✓	\$1,000.00	Payment succeeded

Figure 2: The payment transaction dashboard shows the status of payments. Pending and completed payment numbers are prominently displayed at the top, and more details about individual payments are provided below.

“ The Outlook plugin enables users to attach emails to cases, add time entries, and manage case-related documents and tasks without leaving the inbox. It also allows users to search for cases and contacts and copy documents and contact information directly from the case to email and vice versa.”

Before the invoice is finalized, it is reviewed for necessary adjustments, accuracy, and compliance with client agreements. Firms can create the workflow required to ensure consistency and efficiency.

Trust accounting is integrated seamlessly. Trust funds can be applied to invoices, ensuring proper handling of client funds. Automated reminders for overdue invoices can be set to help firms stay on top of collections and follow up with clients. Users can see the pending transactions on the Transaction dashboard. See Figure 2 on the previous page.

An invoice can be emailed to the client upon completion of the approval procedure, and a link to the invoice is included. The bill will be paid from the trust fund if a retainer is in place. After clicking the link, the client is taken to a payment page where they can finish the transaction by entering the amount to be paid, choosing the payment method, and providing any necessary information. Filevine’s payment processing feature allows firms to offer flexible payment methods to their clients. From credit cards to ACH transfers, clients can pay with ease, with the click of a button, and the firm receives instant payment.

### Reports

Using their tight integration with Periscope, Filevine provides reports on billing performance, outstanding balances, and revenue trends, providing insights to make informed decisions about the practice’s

financial health. All reports are dynamic, allowing users to filter results and drill down to the information they need. See Figure 3.

### Integrations and Security

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. Plugins work in both the desktop and mobile versions. Firms can seamlessly synchronize billing and invoicing data with Intuit QuickBooks as well as other accounting software. The Outlook plugin enables users to attach emails to cases, add time entries, and manage case-related documents and tasks without leaving the inbox. It also allows users to search for cases and contacts and copy documents and contact information directly from the case to email and vice versa. The most common integrations include Zapier, Slack, and Google (calendar, Gmail).

Filevine takes information security, privacy, and compliance seriously. Filevine aids law firms and professionals with best-in-class compliance, privacy, and security programs. These programs protect data from potential threats, including ransomware attacks. Filevine employs robust security measures, including encryption and regular audits. They meet the highest standards to safeguard client information. Filevine continuously improves its security posture through

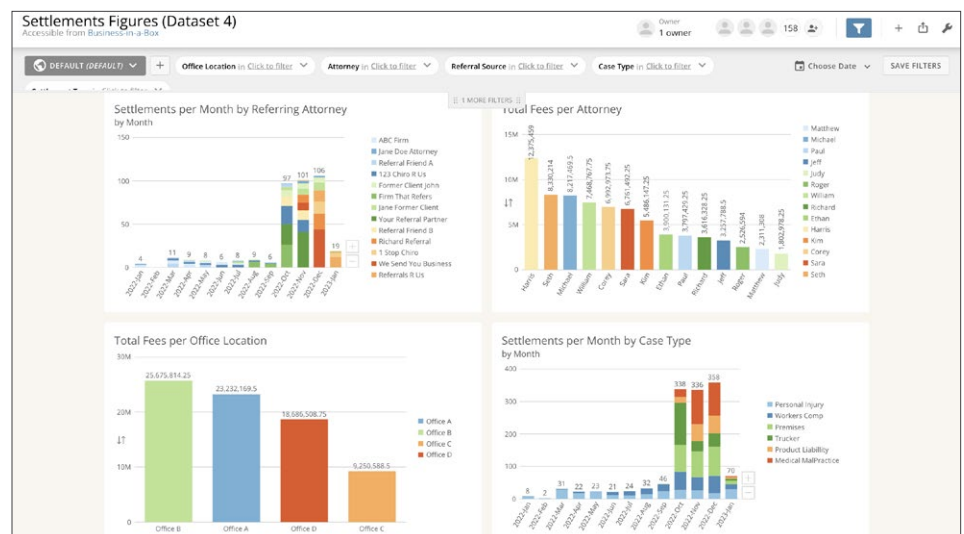


Figure 3: Interactive dashboards provide key information such as reviewing data related to settlements. You can drill down to key numbers including by attorney, month, or office. The dynamic nature of the dashboards provides easy access to filtered information.

regular risk assessments, audits, and privacy impact analyses. Additionally, vulnerability scans, penetration testing, and other best practices ensure ongoing security. Filevine undergoes various audits, including HIPAA, CJIS, and ISO 27001 security controls. NIST 800-53 controls are also assessed to maintain compliance. Filevine complies with state, federal, and international privacy requirements. A Data Privacy/Data Protection Officer (DPO) leads privacy efforts. Filevine further conducts vulnerability assessments to detect system vulnerabilities. Employees receive ongoing security awareness training to combat evolving cyber threats. Filevine's security team members hold industry-recognized security certifications covering cloud, network, wireless security, penetration testing, auditing, and more. Filevine products and services run on AWS, GCP, and Microsoft Azure, and data traffic is encrypted using HTTPS, ensuring secure communication.

### Pricing

All Filevine licenses include unlimited document storage, cloud-based case and

task management, scheduled reports, automated workflows, calendaring, team collaboration tools, 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 custom-built AI-powered solutions 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?

- Filevine is continually developing and adding key features to the platform.
- Filevine provides robust resources and [Filevine University](#) for clients to stay current with information and skills.
- Customization allows firms to develop workflows tailored to their needs to capitalize on the efficiencies of timesaving automation available on the platform.

### See Filevine Today!

Filevine is a comprehensive platform with plenty to offer your law firm. [Schedule a demo today](#) to learn how it can help you. ■



# From Time Tracking to Invoicing: How TimeSolv Transforms Legal Practice

“TimeSolv’s mobile app works seamlessly with the desktop application, allowing lawyers to use the built-in timers to track activity in real time, even when they are not connected to the internet, providing a seamless data sync. Users can employ abbreviation codes for long descriptions and use their phone’s voice-to-text functionality for quick and accurate data entry.”

**Company Name Brand**  
ProfitSolv

**Product Name Brand(s)**  
TimeSolv

### Latest Developments and Updates

- New reports based on the Logi Report framework. All previous reports and report loading times were updated and improved, particularly for companies with higher data volumes. Users now have the option to go back to the previous version of a report, while the new version is enabled by default.
- Multiple sessions are now supported, enabling users to open numerous reports simultaneously.
- Enhanced flexibility with invoice customization.
- Word templates for retainer invoices: users can define the styling, formatting, and placement of elements in their Word template, providing greater flexibility in modifying retainer invoices to meet their needs.
- UI and performance enhancements across the application, including invoice generation, time entry, expense entry,

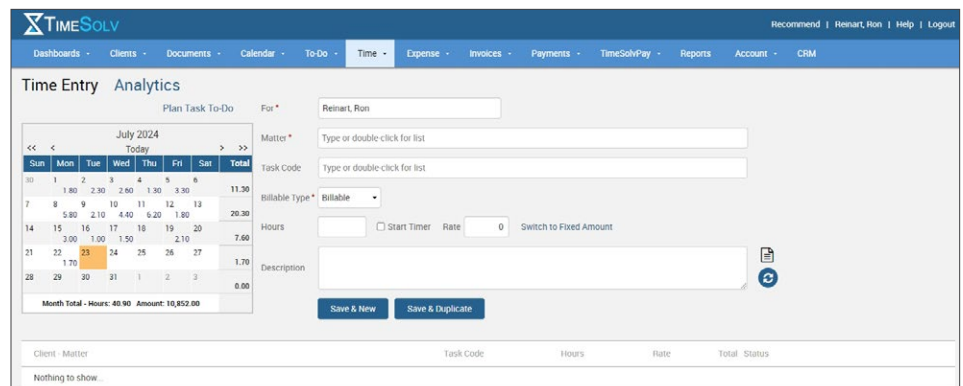
time search, LEDES invoices, and dashboards.

### Increasing Billable Time and More

TimeSolv is a cloud-based timekeeping and billing platform tailored specifically for law firms and other professional services. Since its inception in 1999, TimeSolv has been helping legal professionals increase their billable time and streamline their billing processes. The most prominent administrative challenges lawyers face are accurately tracking time, invoices going unpaid, and managing the logistical aspects of their cases. TimeSolv provides a solution for all of these issues.

### It’s All About Time

Lawyers know that timekeeping extends beyond hourly billing. TimeSolv allows legal teams to track every minute spent on tasks and gain valuable insights into potential inefficiencies. TimeSolv provides resources for the firm to evaluate the profitability of flat-rate legal fees and set matter time budgets to protect profitability. Users can see their daily, weekly, and monthly time billed. *See Figure 1.*



**Figure 1:** TimeSolv summarizes performance related to time entries, showing monthly total hours billed and the value of those hours. Users see their billable totals for each day and week.

“ Clients can make payments directly through the secure client portal, simplifying the process for everyone. Payments are seamlessly synchronized to QuickBooks or Xero using TimeSolv’s best-in-class synchronizing features.”

Team members can create time entries manually in the application or via widget timers, capturing time as they work rather than trying to recreate how they spent their day. TimeSolv’s mobile app works seamlessly with the desktop application, allowing lawyers to use the built-in timers to track activity in real time, even when they are not connected to the internet, providing a seamless data sync. Users can employ abbreviation codes for long descriptions and use their phone’s voice-to-text functionality for quick and accurate data entry. The mobile app is available for both iOS and Android devices.

The in-depth reporting assists teams in understanding how hours are spent and analyzing productivity and project allocation. Setting time budgets allows case administrators to keep projects profitable and create alerts when billing approaches a preset limit. TimeSolv offers an [interactive time tracking demo](#) to increase user success.

TimeSolv also helps track expenses efficiently, allowing users to attach receipts to matters and invoices, set limits on tracked expenses per matter, and see a calendar overview of expenses (daily, weekly, monthly). Firms can also set up daily, weekly, or monthly recurring expenditures. These tools enable the firm to keep track of expenses and prepare accordingly.

### Billing and Invoicing

TimeSolv automatically formats invoices to meet the exact specifications of the LEDES billing system, ensuring compliance and reducing the risk of errors. TimeSolv supports multiple LEDES formats, including LEDES 1998B, LEDES 1998BI, LEDES 2000, and LEDES 1998BV2. This flexibility allows a firm to choose the format that best meets its needs.

A firm can customize invoices to match their style and branding, including all necessary details like time entries, expenses, trust balances, and more. Whether billing hourly, flat rate, or on a contingency basis, TimeSolv adapts to each firm’s needs. Users can view draft invoices and filter by client or date range on the draft invoice screen. *See Figure 2.*

Trust accounting is critical for law firms to manage client funds accurately and ethically. Track all financial transactions related to client trust funds in TimeSolv, ensuring compliance with legal requirements. TimeSolv automates trust transactions to pay invoices directly from trust accounts and monitors trust account balances. When funds fall below the designated level (minimum balance), TimeSolv automatically replenishes them. Each matter can have unlimited trust accounts (IOLTA or COLTAF). Conveniently manage client funds across different cases

Client	Matter	Date	Amount	Status	Split	Printer	Email	AutoMail
Aaron Durr	Legal Services	2024-07-23	\$2,670.00					
Amy Smith	2024 Tax Returns	2024-07-23	\$660.00					
Amy Smith	941 Work	2024-07-23	\$450.00					
Amy Smith	Accounting Services	2024-07-23	\$450.00					
Bass, Jamie	Legal Counseling	2024-07-23	\$1,500.00					
Bob Euchre	Legal Services	2024-07-23	\$30.00					
Bruce Banner	Multiple Matters	2024-07-23	\$3,180.00					
Bruce Wayne	Bar Cave Renovation	2024-07-23	\$52.00					
Denny Crane	Legal Services	2024-07-23	\$1,459.03					
Finn Jones	Contested Divorce	2024-07-23	\$3,690.00					
Finn Jones	Real Estate	2024-07-23	\$510.00					
Finn Jones	General	2024-07-23	\$5,900.00					
Finn Jones	Legal Counseling	2024-07-23	\$960.00					
<b>Total</b>			<b>\$28,771.03</b>					

**Figure 2:** A listing of all invoices prior to final billing shows the clients, individual invoice amounts, and total amount. Additionally, users can view draft invoices without downloading by clicking on the magnifying glass on the far right. Editing can be done by clicking the dollar amount and modifying line items, descriptions, rates, and other details.

“ TimeSolv offers centralized document storage to keep all case-related documents in one place, eliminating the need to juggle multiple repositories or search through scattered files. Teams can create customizable folders based on case type, client, or other criteria.”

within a single interface. If a firm handles multiple cases for a client, moving client funds between trust accounts is seamless. Precise fiscal management, including accurate monthly reconciliations, ensures accuracy and compliance. Detailed reports help firms analyze trust activity, identify discrepancies, and maintain transparency. TimeSolv’s trust accounting software adheres to legal trust accounting rules.

### Payments

Getting paid is critical to any firm’s success. TimeSolvPay is a built-in feature that assists with collecting, recording, and allocating payments. Firms can easily enter payments and credits, whether checks, cash, or credit cards, and allocate them to specific invoices. Clients can make payments directly through the secure client portal, simplifying the process for everyone. Payments are seamlessly synchronized to QuickBooks or Xero using TimeSolv’s best-in-class synchronizing features.

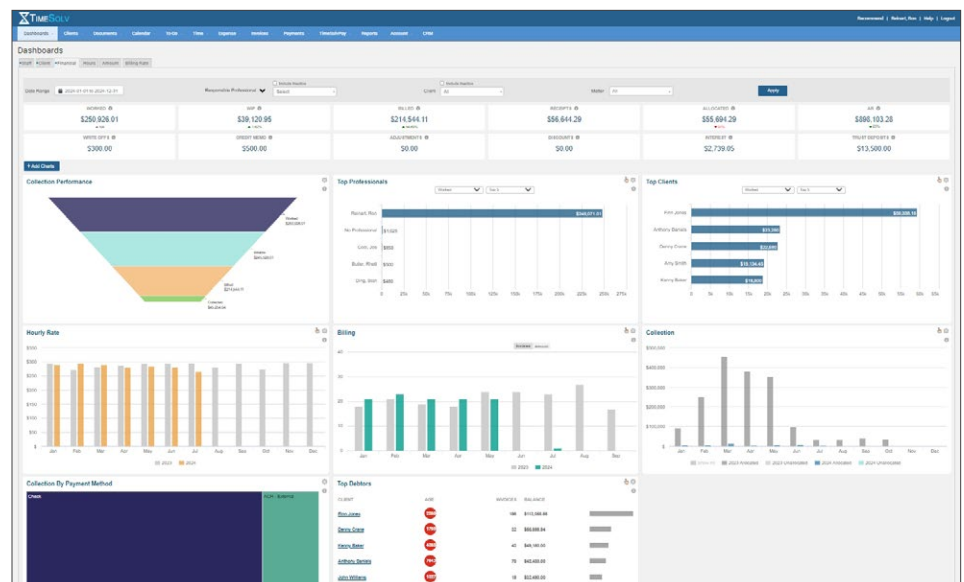
The client portal is a centralized platform enabling clients to manage and make payments conveniently. Clients can receive and view electronic invoices directly within the portal. It supports various payment options like eCheck, credit card, virtual card, and digital wallet. Clients can check their account status, view payment history, and access relevant documentation like sales orders and contracts. Clients have

the flexibility to make payments at their convenience, reducing the need for manual intervention. The advanced portal offers features for clients and accounts receivable teams to leave questions and comments directly on invoices, facilitating faster dispute resolution.

**TimeSolv’s AR calculator** helps law firms and other professional services understand and improve their accounts receivable (AR) management. The AR calculator helps determine additional revenue that could be made using TimeSolv’s Zero AR process. Users enter their current collection rate, the average number of days it takes to collect payments, and the average amount billed per month. The calculator then shows the potential revenue gain by implementing TimeSolv’s Zero AR process. It provides a comparison between the current collection total and the possible total with a 97% collection rate. Firms can see an improved cash flow by understanding and optimizing the AR process, driving efficiency, and providing financial insight. TimeSolv’s AR calculator is valuable for any firm looking to enhance its revenue management and streamline its billing processes.

### Case Management

TimeSolv offers centralized document storage to keep all case-related documents in one place, eliminating the need to juggle multiple repositories or search through



**Figure 3:** The dynamic dashboard empowers legal professionals by providing actionable insights to help them make informed decisions. It offers interactive visualizations to analyze revenue trends, compare expenses, and easily review billing and payment statistics. Seamlessly integrated with TimeSolv’s time-tracking software, the dashboard becomes a centralized hub. Manage tasks, deadlines, and project progress—all in one place.

scattered files. Teams can create customizable folders based on case type, client, or other criteria. Documents can be found through searching by keywords, dates, and file types. Automating repetitive tasks related to document creation and management saves legal teams time, drives efficiency, and reduces errors. This translates into reduced time drafting routine documents and increased time to focus on client needs.

Firms can save time and money by efficiently managing case-related tasks. Teams can track tasks and monitor deadlines, court appearances, and other critical events. Workflows can be developed based on firm protocols, with automatic tasks triggered by dates or events. TimeSolv provides tools to manage case expenses to stay within budget and facilitates communication among team members working on the same case. Dynamic dashboards provide real-time insights into key metrics like billable hours, accounts receivable, matter profitability, and more. *See Figure 3 on the previous page.*

### Integrations and Security

TimeSolv has integrations with document management platforms, online payment

software, Office 365 Outlook, and common accounting software used by lawyers, including QuickBooks. TimeSolv employs 256-bit AES (Advanced Encryption Standard) and SSL (Secure Sockets Layer) encryption, ensuring that data transmitted and stored within TimeSolv remains confidential and secure. Hosted on AWS (Amazon Web Services), TimeSolv is SAS 70 compliant, ISO 9001 certified, and PCI DSS compliant.

### Pricing

TimeSolv is billed on a per-user basis with discounts based on the number of users and additional savings available by paying on an annualized basis rather than monthly. Pricing starts at \$49.99 per user for 1-4 users, \$47.49 per user for 5-14 users, and \$44.99 per user for 15+ users. Contact TimeSolv for full pricing details.

### Who is ProfitSolv?

ProfitSolv is a comprehensive suite of billing, payment, and other software solutions designed specifically for professional services firms. ProfitSolv offers solutions tailored to the needs of small boutique firms to large practices. Based out of Knoxville, Tennessee, ProfitSolv employs almost 250 professionals across the US. TimeSolv was created in 1999 by Thomson

Reuters as one of the pioneering online time and billing platforms available specifically for lawyers. As part of ProfitSolv, TimeSolv continues to evolve and provide key services for law firms.

### Why Buy TimeSolv?

- Efficient and accurate time tracking and billing accessed from anywhere, at any time.
- Case management features that link timing and expenditures to billing.
- Online [resources](#) and a catalog of [YouTube](#) videos provide users with on-demand support.

### See TimeSolv Today!

[Schedule a demo today](#) to learn what TimeSolv can do and how law firms are making time and billing services more efficient! TimeSolv also offers a [free trial](#). ■

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