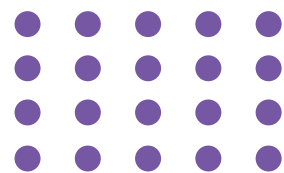
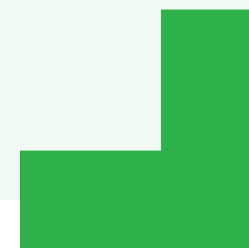


# 2024

# LEGAL SOFTWARE REPORT



PUBLISHED BY UPTIME LEGAL SYSTEMS



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# Introduction

## to the 2024 Legal Software Report

In the fast-paced world of legal technology, finding the ideal software for your law firm involves a deliberate evaluation of your objectives and a comprehensive review of the latest offerings.

For some, you may question if you should pursue new software or double down on your existing technology strategy.

For others, you may wonder how you can adapt your law firm to changing industry standards, advancements in technology, and meeting client expectations for accessibility and security.

While it's easy to be overwhelmed by the myriad choices across software categories, you don't need to do all of the research alone. It's helpful to utilize resources that cut down on the time and effort required to understand the needs of your law firm, what features various software offers, where technology is headed, and how to put a technology strategy together that not only satisfies your fundamental requirements but improves your daily workflow and ultimate success.

For these reasons and more, I'm proud to introduce the **2024 Legal Software Report** from Uptime Legal Systems. This is the fourth edition of the report, and we're excited to re-rank some categories while introducing others that are new this year.

Whether you're a client of ours or this is the first time you're hearing about us, we believe in the education-first approach, thereby offering up as much helpful information and guidance to inform our audience, while staying approachable for any consultations you may need. Being on the same page is conversational lubricant when figuring out what works best for your law firm.

Use the 2024 Legal Software Report to understand the different categories of software that a law firm uses. We have closely observed and actively engaged with all of the leading legal software solutions, gaining profound insights into both their capabilities and limitations.

For each software solution, we meticulously examine its features, functionalities, and user experiences. Our rigorous evaluation process provides an unbiased assessment, highlighting the strengths and potential considerations for each platform.

As you read through our Legal Software Report, we encourage you to take notes and reach out if you would like any further guidance. Let us be your trusted partner as we navigate the cutting-edge solutions that drive the legal industry forward.

Onward and Upward!



**Dennis Dimka**

CEO | Uptime Legal Systems

# New in 2024

Last year, we expanded the Legal Software Report to include the top Intake & CRM applications for law firms.

This year, we are expanding our scope again to include the top **Legal Accounting Software** for law firms. Along with these additions, we continue to edit and update our other software categories, discuss what to know about cloud-hosting, AI, and provide an array of resources to further assist in your decisions regarding legal software.

For over a decade, Uptime Legal Systems has counseled law firms on managing their technology, their practice, and what it takes to not only survive but prosper.

For those reasons and more, we encourage you to take advantage of our comprehensive 2024 Legal Software Report.

# PART 1

# Law Practice Management & Accounting Software

## How to Choose the Best Law Practice Management Software

Before we dive into this year's top law practice management software, we want to offer some guidance to assist in evaluating and choosing the best software for your law firm.

First of all, it's important to remember that there is no single practice management software that is objectively better than all others.

In our 2024 Legal Software Report, you'll find that different platforms focus and specialize in different aspects of practice management. Your job, or our job if you seek consultation, is to compare the needs of your law firm against the features and format these platforms offer. Then, you can choose the software that best matches what you're looking for.

Ultimately, each law firm is different, so you must take the unique character of your law firm and how you plan to leverage a practice management solution into consideration.

### Software Capabilities & Requirements

How are you supposed to match your law firm's needs to the offerings of any given software?

We advise our clients to start the process by listing the features and capabilities that your law firm needs in a practice management solution. These features can be further narrowed down into categories such as "must-have," "nice to have," and "irrelevant."

Note: A law firm often comes with moving pieces and departments, each with their own needs and daily hurdles.

Therefore, we strongly suggest that you consult all stakeholders, or those affected, to gain a complete understanding of your team's needs. By doing this, you can ensure company-wide adoption and contentment.

## On-Premise, Cloud-Based Or Hosted Software

The last preparatory note we'll provide for this section is regarding the best deployment of software for your law firm. Each deployment has its advantages and drawbacks.

Here are the 3 options you can choose from. Keep in mind that the first two options describe the functionality of the software as it comes, and the third option describes a clever route you can utilize with most applications.



### On-Premise Software

This describes applications that are designed to be run in-house on your own onsite servers and desktop computers.

These are the applications that, in many cases, have been around for decades, and as a result tend to have richer, robust functionality and capability.

The downside of these applications is that they require your firm to own and maintain servers, which comes with its own substantial costs and headaches.

The solution to this problem, however, is a private cloud, which allows you to reap the benefits of on-premise software without the inherent headaches that accompany them. More on this to follow.



### Web-Based Software

These are applications that are natively-cloud, meaning you run them in a web browser. These applications, which tend to be newer than their on-premise counterparts, don't require a server (or in many cases—any software installation whatsoever).

This makes them low-maintenance and accessible from anywhere.

The downside: These applications are often more lightweight, basic, and generally do less than premise-based software. This is one of the reasons that companies are able to offer this type of product. For solo and small firms, this can be a benefit.

For mid-sized and larger firms, these applications may feel watered-down in comparison to server-based applications.



### Cloud-Hosted Software

As mentioned before, this is not a third category of software. It's actually the same on-premise software we touched on but is hosted in a secure private cloud instead of your own on-premise servers.















A private cloud is an IT platform that hosts your practice management software (along with, in many cases, your files/folders, emails, and more).

This provides you with all the upsides of the cloud (reliability, security, and mobility) without the downsides of servers (costs, headache, and IT management).

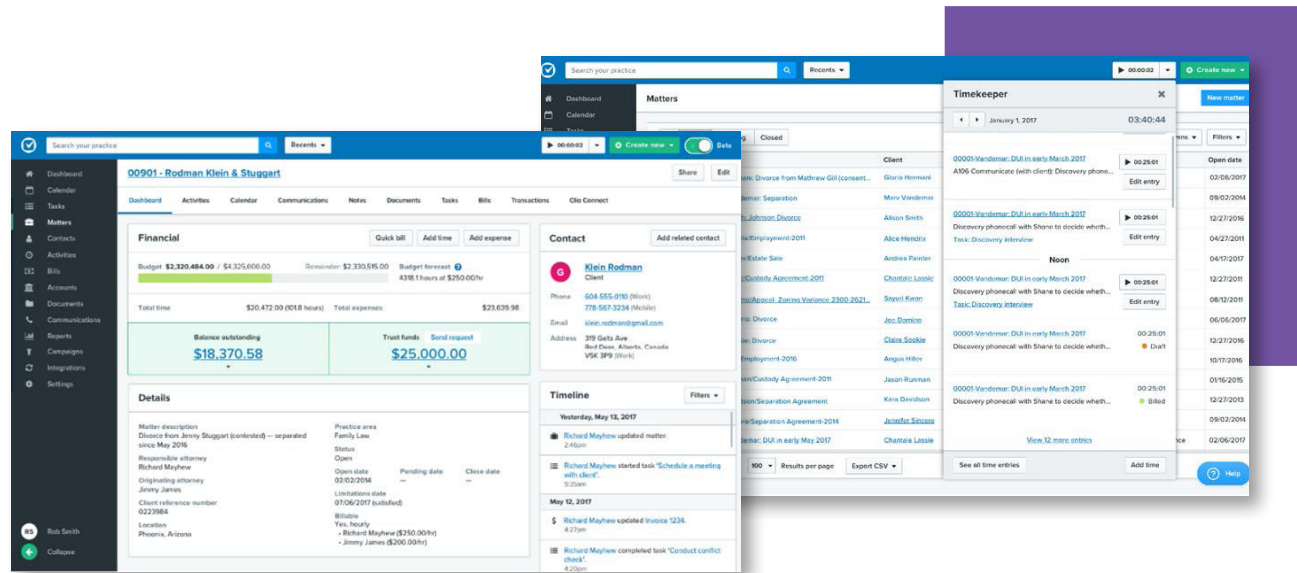
Refer to Appendix B of this report for more information on hosting premise-based software in a private cloud.

You can find this on page 55.

**Hint:** Download this report and click on the icons to the left of each feature to highlight it as a “must-have.”

-  **Client & Contact Management**  
Management of your clients, vendors, related parties and other third parties.
-  **Case/Matter Management**  
Basic management of the details for each case, matter, or project. Information including the related client and particulars of each case.
-  **Calendaring**  
A basic firm-wide calendar, possibly integrating or synchronizing with your Outlook or Google calendar.
-  **Conflict Checking**  
The ability to check for specific names or subjects during a conflict-of-interest check.
-  **Task Management**  
The ability to create, assign and manage tasks and to-dos, including relating to specific matters.
-  **Timekeeping**  
The ability to track and enter billable time on a given matter or for a specific client. This may include simple time entry into a spreadsheet-like interface, or mobile time entry from your smart phone.
-  **Billing & Invoicing**  
Generation of client invoices. This may include customizable invoices, split-level billing, hourly billing, flat fee billing, contingency billing, and cost recovery.
-  **Form/Document Assembly**  
Automatic creation and population of specific forms and documents, including Federal and state-level forms.
-  **Cloud Storage for Documents**  
Included, inline basic cloud storage. For cloud-based practice management applications, this is usually provided in the form of allowing users to attach or upload documents to a specific matter.
-  **Email Management**  
The ability to save specific emails to a matter, or otherwise associate emails (sent or received) to a particular case.
-  **Business Accounting**  
Standard business accounting functions, including General Ledger, management of bank/ operating accounts, Accounts Payable and Accounts Receivable.
-  **Trust Accounting**  
Management of Trust/IOLTA accounts, including enforcement of trust accounting rules and generation of trust account audit reports.
-  **Financial Reports**  
Standard business/accounting reports, including Profit & Loss statements, Balance Sheets, and Cashflow Statements. This may include other law-firm-specific reports, such as Work- In-Progress (WIP) reports, and revenue by client/matter.
-  **Document Management**  
Advanced document management including full-text search, document tagging & profiling, and version management.

# Clio Manage



## OVERVIEW

Clio was amongst the first web-based law practice management applications and stands as the largest today. Clio provides lightweight but effective practice management and is known for its many integrations with other software.

## Full Feature List

- ✔ Client & Contact Management
  - ✔ Case / Matter Management
  - ✔ Calendaring
  - ✔ Conflict Checking
  - ✔ Task Management
  - ✔ Timekeeping
  - ✔ Billing & Invoicing
  - ✔ Form/Document Assembly
  - ✔ Cloud Storage for Documents
  - ✔ Document Management
  - ✔ Email Management
  - ✖ Business Accounting
  - ✖ Trust Accounting
  - ✖ Financial Reports
- \* Available within a Private Cloud

## WHO CLIO MANAGE IS GOOD FOR

Clio Manage may be a good fit for solo law firms, startups, and law firms with less than 10 total timekeepers. Clio is a good fit for firms that need something that is simple, easy to set up and easy to use.

## PRODUCT HIGHLIGHTS

- Clio Manage has a clean, simple user interface that makes it easy for your law firm to adopt.
- Clio has an extensive App Directory, whereby users can connect and integrate Clio Manage to many other applications that they rely on.
- Clio has an Intake and CRM product, called Clio Grow (formerly Lexicata), that can be used alongside Clio Manage.

## PRICING

- Clio Manage EasyStart: \$39 / User / Month
- Clio Manage Essentials: \$79 / User / Month
- Clio Manage Advanced: \$109 / User / Month
- Clio Manage Complete: \$139 / User / Month (includes Clio Grow)

Pricing is based on an annual subscription and is accurate as of the publication of this report.

## FREE TRIAL

Clio offers a free trial. [Try Clio for free here.](#)

## GET CLIO FOR YOUR LAW FIRM

Get Clio for Your Firm Ready to try Clio? Uptime Legal can help.

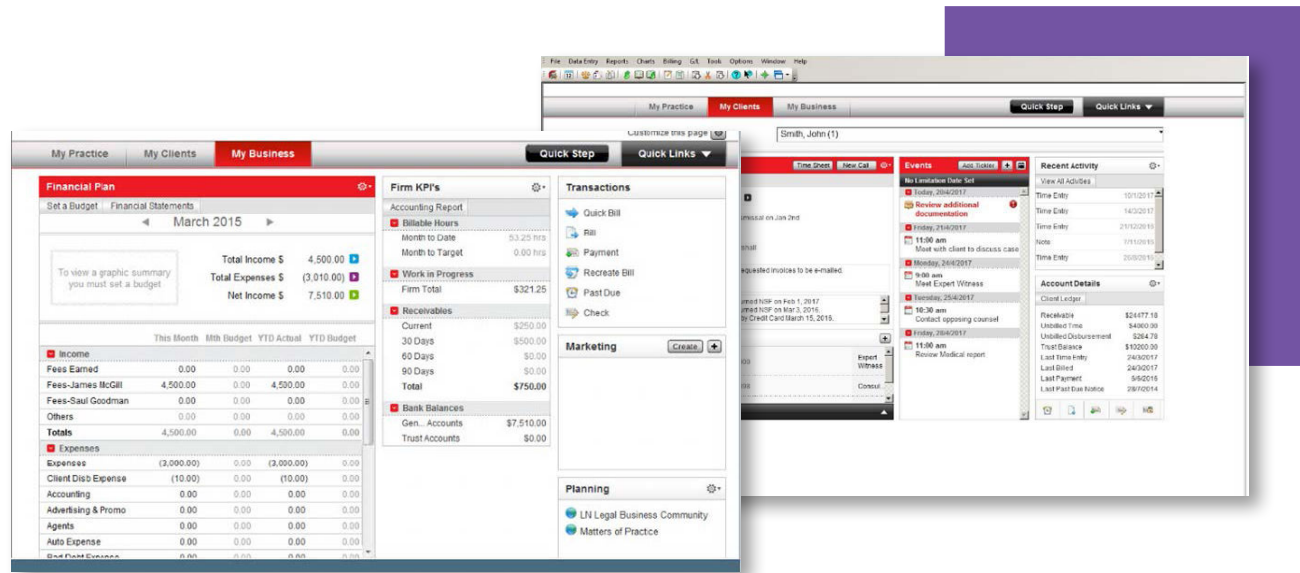
Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions. Learn more about [Clio Manage + Practice Next](#)

## ADDITIONAL RESOURCES

Review: [Full Clio Manage Review for Law Firms](#)



# PCLaw



## OVERVIEW

Over time, PCLaw has gained significant popularity as a reliable and well-established software solution for small and midsize law firms by offering comprehensive practice management, billing, and accounting functionalities.

This solution combines user-friendly features for managing clients, cases, and calendars with powerful time tracking, billing, and accounting capabilities, including extensive financial reporting options.

Notably, PCLaw stands out among its competitors as an all-in-one solution, eliminating the need for separate software dedicated to bookkeeping and accounting tasks.

## WHO PCLAW IS GOOD FOR

PCLaw serves as an excellent choice for law firms seeking a unified solution that encompasses case management, billing, and accounting functionalities.

PCLaw stands out as an ideal option for law firms that prefer to eliminate the need for separate software (like QuickBooks). Moreover, it offers flexibility in billing structures and trust accounting, making it a highly adaptable solution for diverse law firm needs.

## PRODUCT HIGHLIGHTS

- PCLaw is designed to be a one-stop solution for client/matter management, document automation, timekeeping, billing, and accounting.
- PCLaw stands out for its simplicity and ease of use, making it one of the most user friendly applications.
- Unlike some other legal software, it doesn't require a consultant for implementation and can be easily started and utilized.
- PCLaw has some of the most sophisticated and flexible billing options of any legal billing/ accounting software. Some options include capabilities for fixed-fee, split billing and comprehensive billing and financial reporting. If preferred, you could also integrate it with QuickBooks.
- PCLaw can be used stand-alone, or in conjunction with Time Matters - PCLaw | Time Matters' practice management/document management application.

## PCLAW IN THE CLOUD

PCLaw is server-based. This means it must run on your firm's on-premise servers, which may come with its own pitfalls, or within a full-managed Private Cloud. A Private Cloud, such as [Uptime Practice](#), will host your PCLaw, documents, emails, and other applications in a secure cloud workspace.

- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere

Learn more about [PCLaw in the Cloud](#).

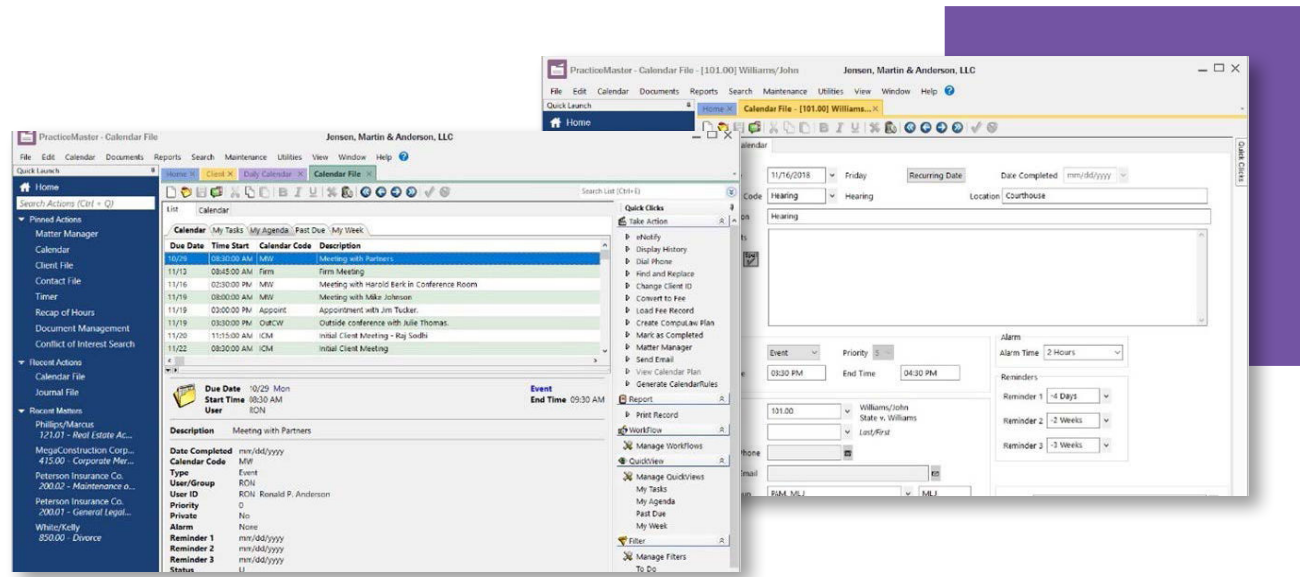
## ADDITIONAL RESOURCES

Article: [How to Use PCLaw In the Cloud](#)  
 Review: [Full PCLaw Review for Law Firms](#)

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✖ Form/Document Assembly
- \* Cloud Storage for Documents
- ✔ Document Management
- ✔ Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports
- \* Available within a Private Cloud

# Tabs3



## OVERVIEW

Tabs3 provides a complementary set of robust tools designed specifically for law firms to enhance their case management, billing, and accounting processes.

Tabs3 serves as a vital component for the “back-office” operations, offering essential features such as time tracking, billing management, and accounting functionalities.

To complete the picture, they also provide “front-office” functionality through powerful capabilities for client and matter management, allowing law firms to efficiently handle their client relationships and matter-related tasks.

## WHO TABS3 IS GOOD FOR

Tabs3 is a good fit for law firms that need both comprehensive billing and accounting (including trust accounting) along with a sophisticated solution to manage clients and cases.

By offering a robust suite that handles both front-office and back-office functions, Tabs3 eliminates the need for law firms to use separate software to manage their practice and accounting.

## PRODUCT HIGHLIGHTS

- Tabs3 offers a network of skilled and capable consultants who can assist your law firm in implementing and customizing Tabs3 to align with your specific requirements.
- Tabs3 integrates with other law firm applications - most notably Worldox for document management.

## TABS3 IN THE CLOUD

Tabs3 is server-based, which means it must either be run on your firm’s on-premise servers or within a fully-managed Private Cloud.

A Private Cloud, such as [Uptime Practice](#), will host your Tabs3 software, documents, emails, and other applications in a secure cloud workspace.

- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere [Learn more about Tabs3 in the Cloud.](#)

## ADDITIONAL RESOURCES

Article: [How to Use Tabs3 in the Cloud](#)

Review: [Full Tabs3 Review for Law Firms](#)

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- \* Cloud Storage for Documents
- ✔ Document Management
- ✔ Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports

\* Available within a Private Cloud

# ProLaw



## OVERVIEW

ProLaw is a robust solution designed specifically for law firms, offering a comprehensive suite of features including Legal Practice Management, Document Management, and Accounting.

As server-based software, ProLaw provides the flexibility to run it either on-premise, utilizing your in-house servers, or within a secure private cloud environment. This ensures that law firms can choose the deployment option that best suits their needs and preferences.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- \* Cloud Storage for Documents
- ✔ Document Management
- ✔ Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports

\* Available within a Private Cloud

## WHO PROLAW IS GOOD FOR

ProLaw offers an ideal solution for law firms seeking a comprehensive software platform that combines practice/case management, robust document management, and complete accounting functionalities.

It stands out as the sole software platform that encompasses all three essential components of legal software.

While ProLaw is particularly well-suited for small and mid-sized firms, it may not be the optimal choice for solo law practices or firms with fewer than 10 employees.

## PRODUCT HIGHLIGHTS

- ProLaw offers a modular software approach, allowing customers to choose and utilize either the front-office module (practice management and document management), the backoffice module (business and trust accounting), or both, based on their specific needs.
- As a highly robust software solution, ProLaw performs a wide range of functions, necessitating a powerful and multi-server IT infrastructure. This infrastructure can be implemented either on-premise or hosted within a secure private cloud.
- ProLaw integrates deeply with the Microsoft Office suite, enabling seamless collaboration with Word for documents and Outlook for emails. Additionally, ProLaw integrates seamlessly with Westlaw and WestlawNext.

## PROLAW IN THE CLOUD

ProLaw is server-based, which means it can be run on your firm's on-premise servers, or within a full-managed Private Cloud. A Private Cloud, such as [Uptime Practice](#), will host your ProLaw software, documents, emails, and other applications in a secure cloud workspace.

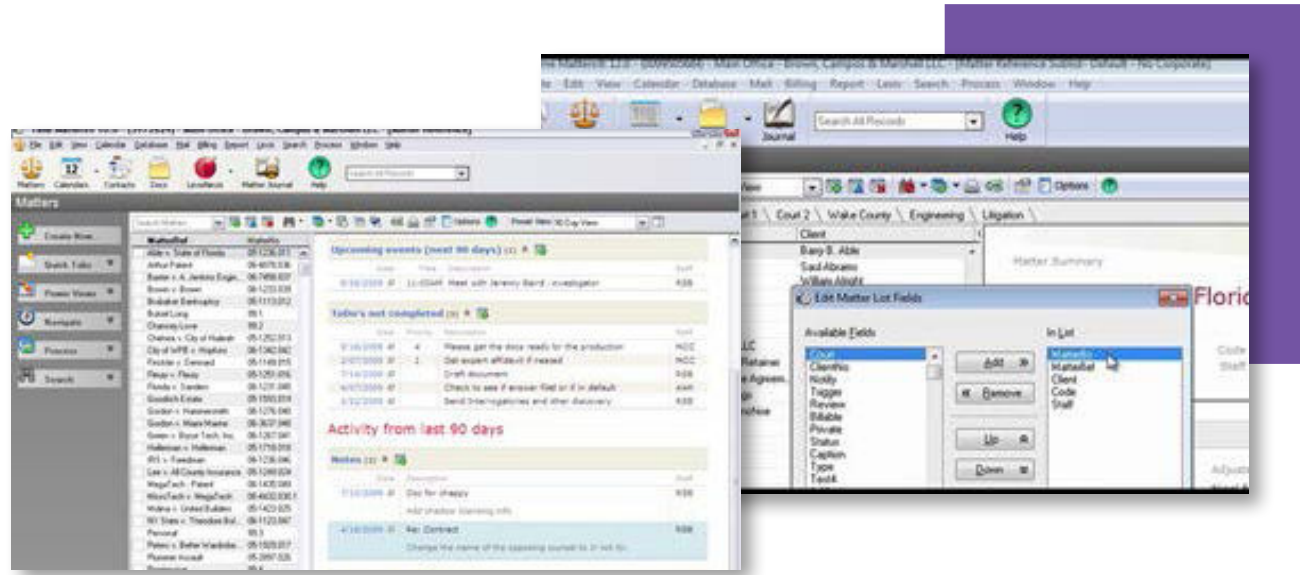
- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere

Learn more about [ProLaw in the Cloud](#).

## ADDITIONAL RESOURCES

Article: [How to Use ProLaw in the Cloud](#)  
 Review: [Full ProLaw Review for Law Firms](#)

# Time Matters



## WHO TIME MATTERS IS GOOD FOR

Time Matters is an excellent choice for law firms seeking a sophisticated platform to efficiently manage clients, matters, calendars, and documents.

Furthermore, Time Matters is particularly well-suited for firms that require a high level of software customization. It offers extensive customization options, allowing law firms to tailor matter management by practice area or case type.

## PRODUCT HIGHLIGHTS

- Time Matters offers robust case management, including matter management, Calendaring, and billing – as well as document management capabilities.
- Time Matters is highly customizable. Matter screens, reports, workflows and more can be customized to meet the unique needs of a particular law firm.
- Time Matters can be used in conjunction with PCLaw or Juris for accounting.
- Time Matters has a network of consultants and resellers that can help your firm implement, customize, and make the most of the software.

## OVERVIEW

Time Matters is a long-standing, popular Practice Management and Document Management solution.

Time Matters is unique in its mix of LPM and DMS capabilities, as well as being one of the most customizable practice management products on the market.

## TIME MATTERS IN THE CLOUD

Time Matters is server-based, which means it must be run on your firm's on-premise servers or within a full-managed Private Cloud. A Private Cloud, such as [Uptime Practice](#), will host your Time Matters, documents, Emails, and other applications in a secure cloud workspace.

- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere

Learn more about [Time Matters in the Cloud](#).

## ADDITIONAL RESOURCES

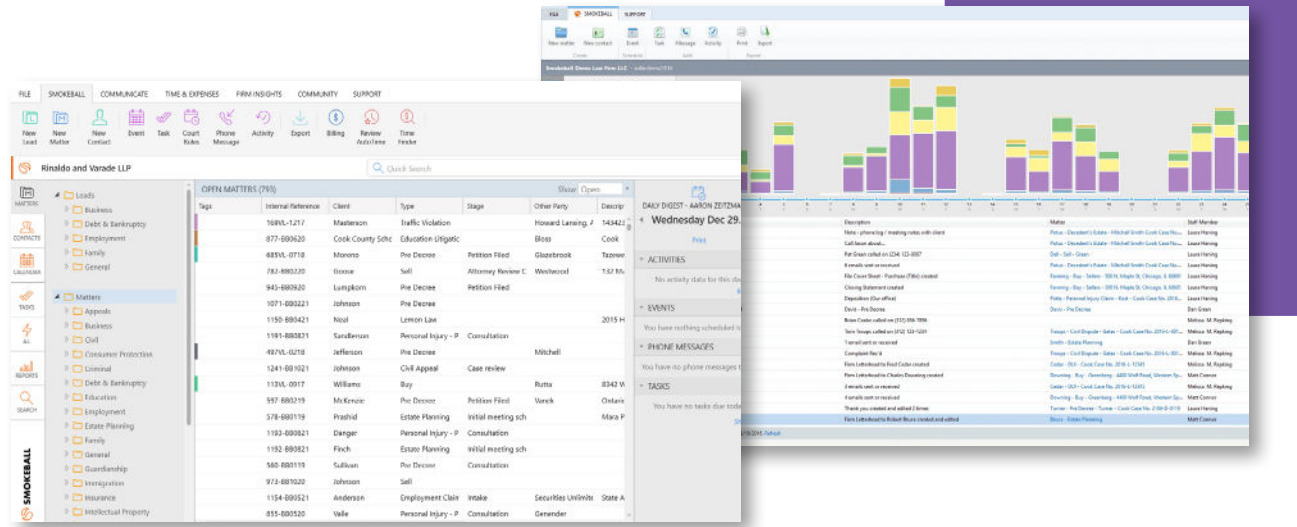
Article: [How to Run Time Matters in the Cloud](#)

Review: [Full Time Matters Review for Law Firms](#)

## Full Feature List

- |                                    |                               |
|------------------------------------|-------------------------------|
| ✓ Client & Contact Management      | ✓ Form/Document Assembly      |
| ✓ Case / Matter Management         | * Cloud Storage for Documents |
| ✓ Calendaring                      | ✓ Document Management         |
| ✓ Conflict Checking                | ✗ Email Management            |
| ✓ Task Management                  | ✗ Business Accounting         |
| ✓ Timekeeping                      | ✗ Trust Accounting            |
| ✓ Billing & Invoicing              | ✗ Financial Reports           |
| * Available within a Private Cloud |                               |

# Smokeball



## OVERVIEW

Smokeball is a versatile Law Practice Management software with substantial document management and automation features that are well-integrated with Microsoft and Outlook.

It allows users to intake and onboard leads, manage legal cases, handle billing and trust accounting, analyze data and reporting through a dashboard, and utilize AI functionality throughout the platform.

## Full Feature List

- ✔ Client & Contact Management
  - ✔ Case / Matter Management
  - ✔ Calendaring
  - ✖ Conflict Checking
  - ✔ Task Management
  - ✔ Timekeeping
  - ✔ Billing & Invoicing
  - ✔ Form/Document Assembly
  - ✔ Cloud Storage for Documents
  - ✔ Document Management
  - ✔ Email Management
  - ✔ Business Accounting
  - ✔ Trust Accounting
  - ✔ Financial Reports
- \* Available within a Private Cloud

## WHO SMOKEBALL IS GOOD FOR

Smokeball is ideal for law firms of 1-30+ users looking for software capable of managing their practice, robust document management, automatic time tracking, and billing & trust accounting.

With four tiers, firms can select the feature set that best suits their needs whether they're a solo practitioner or a multi-office firm.

## DOCUMENT AND EMAIL MANAGEMENT

Smokeball offers robust document management that allows you to add, organize, and share documents.

Their document automation software allows users to create documents using one of 20,000+ legal forms from its library, or using the firm's own document which Smokeball will automate. Users save Word documents and Outlook emails to matters so everything is searchable and accessible via Smokeball.

## PRODUCT HIGHLIGHTS

- As primarily Practice Management Software, Smokeball still brings robust document management to the table.
- Automated Document Assembly can be utilized to have automated workflows through the use of pre-installed templates and templates you have the power to create.
- Time Tracking through Smokeball is effective and automated if you are working through the app, Work, or Outlook. This helps you avoid missing out on billable hours.
- Their Client Management allows you to handle clients efficiently – from intake, to onboarding, to billing, and ongoing communication.

## PRICING

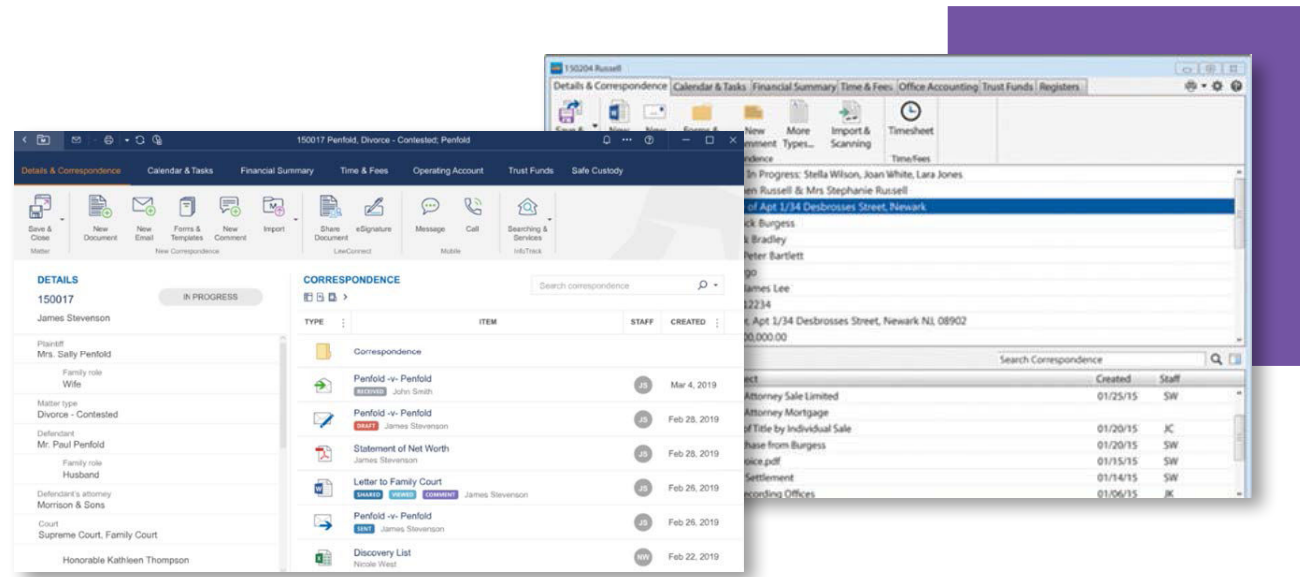
There are four plans (Bill / Boost / Grow / Prosper+), so firms can tailor the software to their needs.

Smokeball also offers a 30-day free trial of their Boost plan. [Contact Smokeball](#) for more information.

## GET SMOKEBALL FOR YOUR FIRM

Ready to try Smokeball? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

# LEAP



## OVERVIEW

LEAP stands out as one of the most feature-rich web-based law practice management applications available. It offers a wide range of functionalities including time tracking, billing, client and matter management, and calendaring.

However, what truly sets LEAP apart is its extensive library of state and federal forms, making it an exceptional choice for document automation.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✖ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- ✔ Cloud Storage for Documents
- ✖ Document Management
- ✖ Email Management
- ✖ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports
- ✖ Available within a Private Cloud

## WHO LEAP IS GOOD FOR

LEAP is good for law firms that want a cloud-based solution but need something more sophisticated than some of its other web-based counterparts. LEAP is also good for firms that have a need for form automation and document assembly.

## DOCUMENT AND EMAIL MANAGEMENT

LEAP offers cloud storage capabilities along with certain document management features. However, for law firms with a substantial amount of historical data, it may be necessary to supplement LEAP with additional tools. Basic cloud storage solutions like OneDrive can be utilized to accommodate the storage needs of large volumes of data. Additionally, a comprehensive Document Management System (DMS) can be considered as an even better supplement to LEAP. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- LEAP's stand-out feature is its comprehensive library of state and federal-level forms, which can be automatically created and saved for your matter right from LEAP.
- LEAP is cloud-based, which means no servers to manage, but is primarily used via a desktop application, making it more robust than traditional web-based software.
- LEAP has integrated cloud storage for documents and a lightweight document management system built in.
- LEAP has a sophisticated mobile app, giving you much of the software's functionality from your Android, iPhone, or tablet.

## PRICING

LEAP does not publish pricing publicly. Contact LEAP directly or a LEAP partner, such as Uptime Legal, for pricing information.

## GET LEAP FOR YOUR FIRM

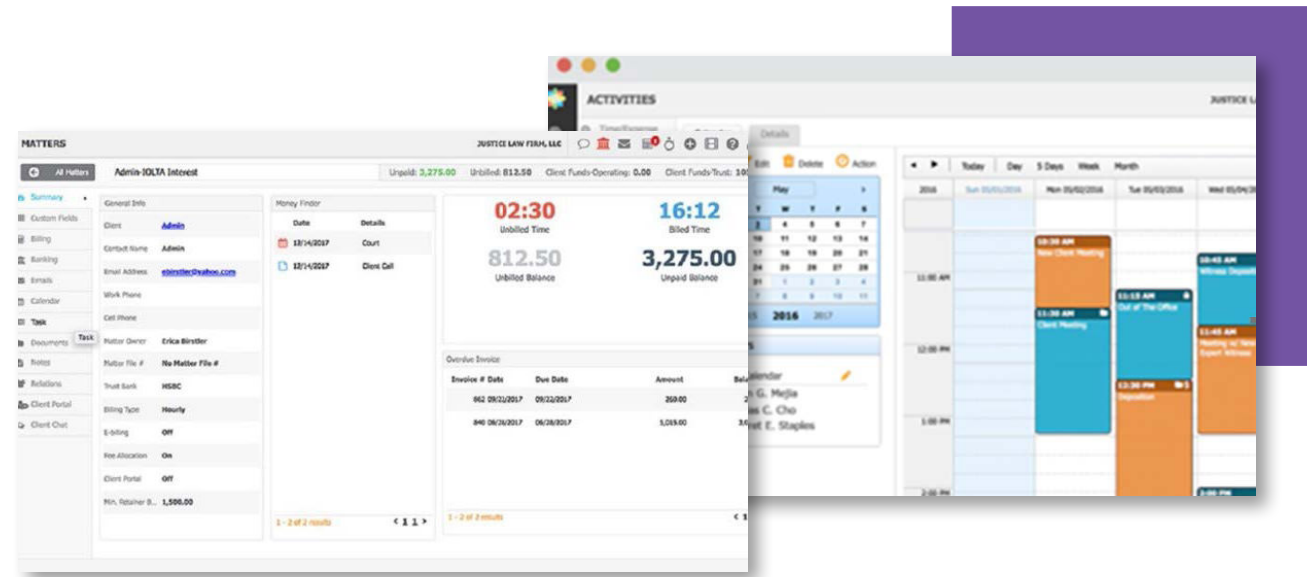
Ready to try LEAP? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

Learn more about [LEAP + Practice Next](#).

## ADDITIONAL RESOURCES

Article: [Full LEAP Review for Law Firms](#)

# CosmoLex



## OVERVIEW

CosmoLex is a cloud-based solution designed specifically for law practice management and accounting. This comprehensive platform encompasses a wide range of functionalities, including client and matter management, time tracking, billing, business accounting, and trust/IOLTA accounting. As a result, CosmoLex eliminates the need for separate accounting software such as QuickBooks.

## WHO COSMOLEX IS GOOD FOR

CosmoLex is good for firms that do not want to manage accounting in QuickBooks (or a separate application), and want practice management and full accounting in a single web-based product. For those who don't want to manage multiple applications in order to efficiently manage their practice while handling the accounting for their firm, CosmoLex is a good choice for combining efforts.

## DOCUMENT AND EMAIL MANAGEMENT

CosmoLex includes cloud storage with fundamental document management features. For firms with extensive historical data, supplementing CosmoLex with basic cloud storage like OneDrive or a comprehensive Document Management System (DMS) may be necessary. See Part 2 of this report to learn more about leading Document Management applications. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- CosmoLex includes full-fledged accounting, including business accounting as well as TRUST/IOLTA accounting.
- CosmoLex has a financial-centric take on matter management. You can see balances due and total revenue for each matter at a glance.
- CosmoLex has built-in tools and reports for managing your trust accounts, including for managing an IOLTA audit.

## PRICING

CosmoLex - Starting at \$99 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.

Free Trial CosmoLex offers a free trial. [Try CosmoLex for free here.](#)

## GET COSMOLEX FOR YOUR FIRM

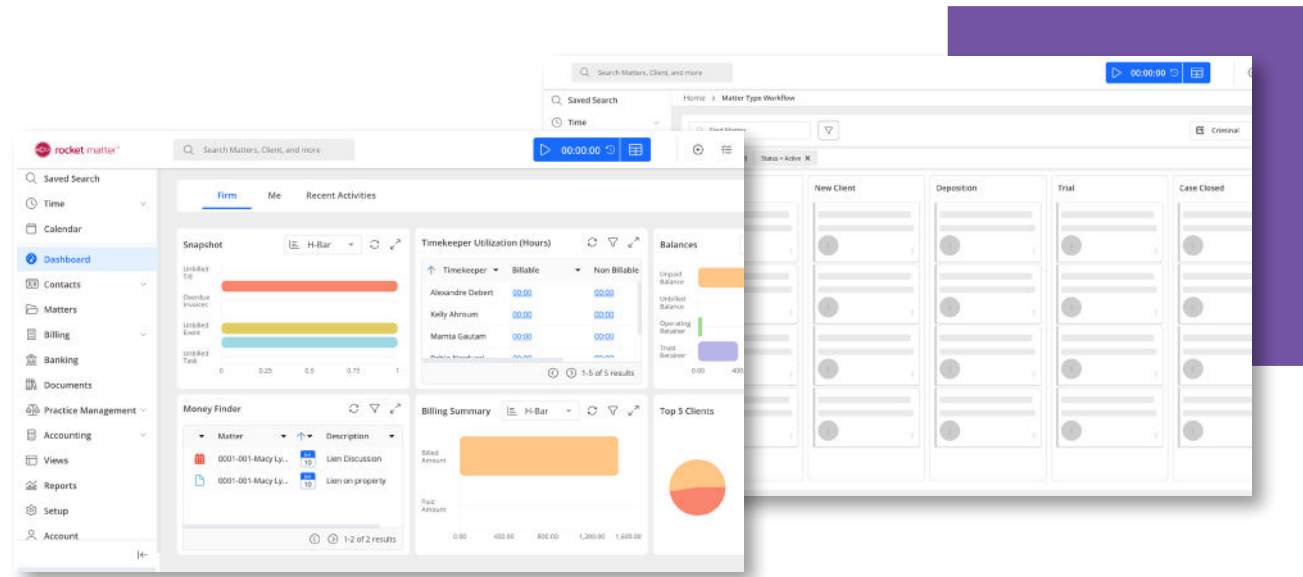
Ready to try CosmoLex? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- ✔ Cloud Storage for Documents
- \* Document Management
- \* Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports

\* Available within a Private Cloud

# Rocket Matter



## OVERVIEW

Rocket Matter was among the first cloud-based law practice management solutions and remains popular today. Rocket Matter allows your firm to manage cases, time, billing, and calendars. Rocket Matter takes a project management-esque approach to matter management.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- ✔ Cloud Storage for Documents
- \* Document Management
- \* Email Management
- ✖ Business Accounting
- ✔ Trust Accounting
- ✖ Financial Reports

\* Available within a Private Cloud

## WHO ROCKET MATTER IS GOOD FOR

Rocket Matter is good for firms that enjoy flexibility in managing firm data through easily configurable dashboards. It's ideal for law firms that regularly share documents with clients and third parties, offering streamlined and secure document collaboration.

## DOCUMENT AND EMAIL MANAGEMENT

Rocket Matter provides cloud storage functionality along with certain document management features. If your law firm has a substantial volume of historical data, it may be necessary to supplement Rocket Matter. Basic cloud storage solutions like OneDrive can be utilized to accommodate those storage needs. Alternatively, a comprehensive Document Management System (DMS) can also be considered as a supplement to Rocket Matter, offering advanced document management capabilities for improved organization and efficiency. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- Project-management style management of matters, including a kanban board for case management.
- Document assembly: Easily create legal documents and store them within Rocket Matter. You can also add billable time to your documents as you create them.
- Two-way document sharing: Send documents to your clients with just a few clicks. You can also securely request documents from your clients that upload directly into your matters.

## PRICING

- Rocket Matter Essentials - \$49 / User / Month
- Rocket Matter Pro - \$79 / User / Month
- Rocket Matter Premier - \$99 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.

## FREE TRIAL

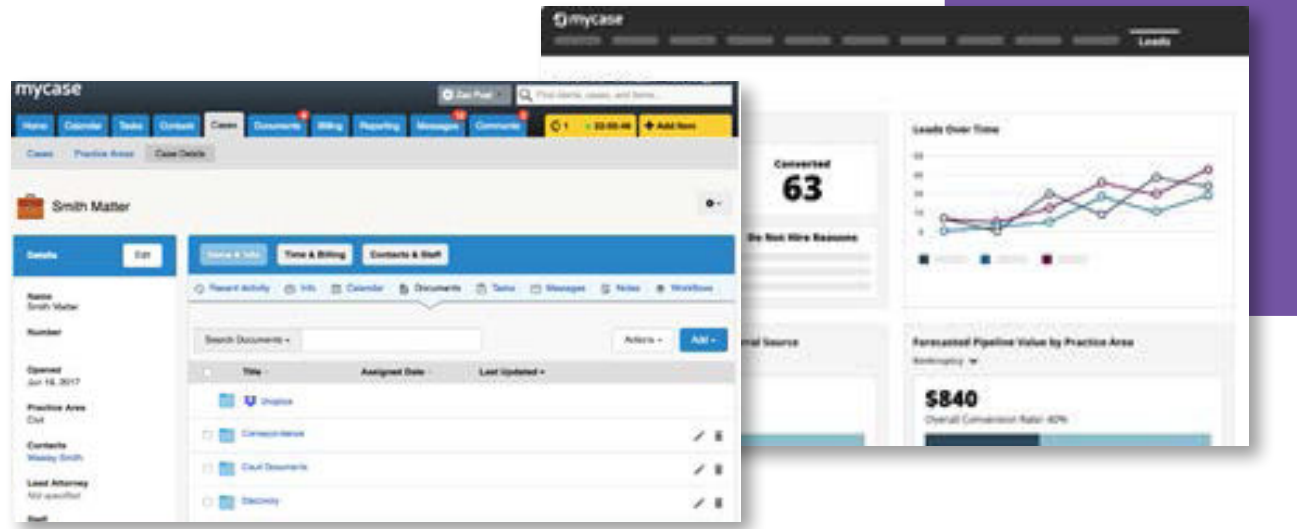
Rocket Matter offers a free trial. [Try Rocket Matter for Free Here.](#)

## GET ROCKET MATTER FOR YOUR FIRM

Ready to try Rocket Matter? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.



# Mycase



## OVERVIEW

MyCase is one of the early web-based law practice management applications, contributing to the advancement of the industry. It is highly regarded for its user-friendly interface and intuitive design, ensuring ease-of-use for law firms. Notably, MyCase is renowned for its exceptional client portal, which is arguably one of the best among all case management systems.

## WHO MYCASE IS GOOD FOR

MyCase is good for many firms, but it is especially good for firms that need a strong client portal or a portal to share information and documents with outside parties (including clients and other attorneys).

## DOCUMENT AND EMAIL MANAGEMENT

MyCase offers cloud storage capabilities along with certain document management features. In the case of a law firm with a substantial amount of historical data, it may be necessary to supplement MyCase with additional resources. Basic cloud storage solutions like OneDrive can be utilized to meet the storage needs of extensive historical data. Additionally, considering a comprehensive Document Management System (DMS) as a supplement to MyCase can provide advanced document management functionalities for efficient organization and handling of large volumes of data. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- MyCase stands out for its user-friendly interface and quick implementation, making it one of the easiest and fastest cloud-based case management applications to use.
- MyCase’s client portal is, arguably, one of the most comprehensive client/third-party sharing portals among all of the law practice management applications.
- MyCase simplifies the sales and intake process by providing integrated intake and lead management software, effectively streamlining client acquisition.

## PRICING

- MyCase Basic - \$39 / User / Month
- MyCase Pro - \$79 / User / Month
- MyCase Advanced \$99 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.

## FREE TRIAL

MyCase offers a free trial. [Try MyCase for Free Here.](#)

## GET MYCASE FOR YOUR FIRM

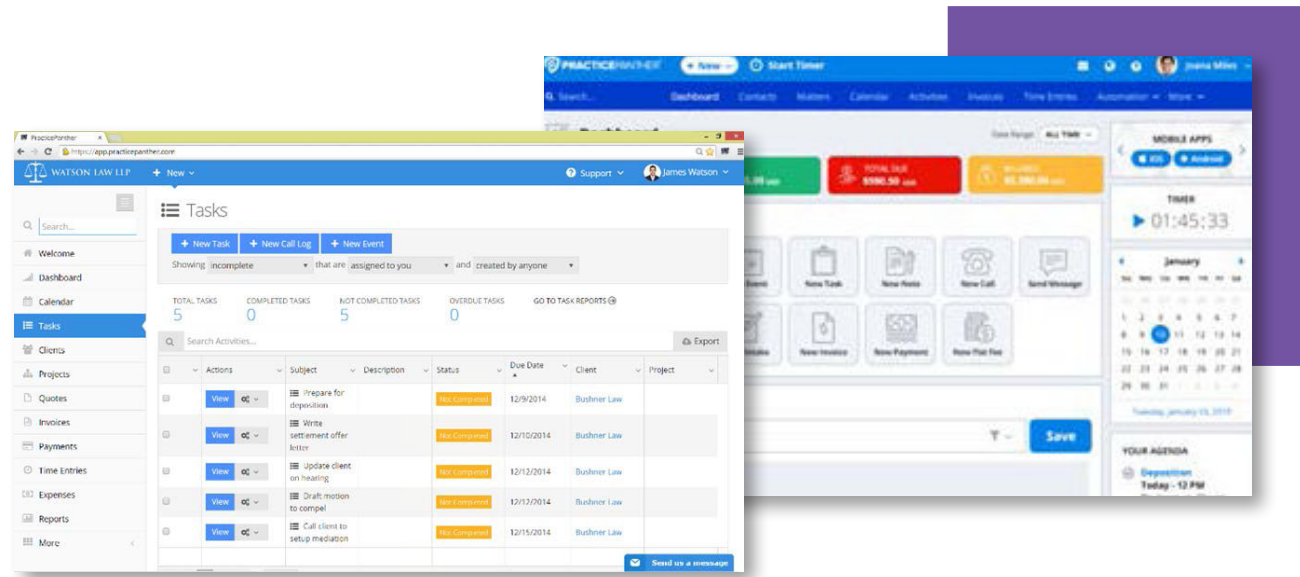
Ready to try MyCase? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

## Full Feature List

- |                               |                               |
|-------------------------------|-------------------------------|
| ✓ Client & Contact Management | ✓ Form/Document Assembly      |
| ✓ Case / Matter Management    | ✓ Cloud Storage for Documents |
| ✓ Calendaring                 | * Document Management         |
| ✓ Conflict Checking           | * Email Management            |
| ✓ Task Management             | – Business Accounting         |
| ✓ Timekeeping                 | – Trust Accounting            |
| ✓ Billing & Invoicing         | – Financial Reports           |

\* Available within a Private Cloud

# PracticePanther



## OVERVIEW

PracticePanther is a widely used case management system specifically designed for law firms. It offers comprehensive features such as client and contact management, matter management, time tracking, billing, and includes a lightweight Customer Relationship Management (CRM) functionality for lead management.

## Full Feature List

- ✔ Client & Contact Management
  - ✔ Case / Matter Management
  - ✔ Calendaring
  - ✔ Conflict Checking
  - ✔ Task Management
  - ✔ Timekeeping
  - ✔ Billing & Invoicing
  - ✔ Form/Document Assembly
  - ✔ Cloud Storage for Documents
  - \* Document Management
  - \* Email Management
  - Business Accounting
  - Trust Accounting
  - Financial Reports
- \* Available within a Private Cloud

## WHO PRACTICEPANTHER IS GOOD FOR

PracticePanther is good for solo and small firms – particularly firms that favor an easy-to-use and easy-to-follow user interface.

## DOCUMENT AND EMAIL MANAGEMENT

PracticePanther includes cloud storage with some features of document management. If your firm has a significant amount of historical data, you may need to supplement PracticePanther with either basic cloud storage such as OneDrive, or with a comprehensive Document Management System (DMS) for advanced document management capabilities. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- PracticePanther has a clean, intuitive user interface, which helps your firm in adopting the software easier.
- PracticePanther has built-in payment processing, eliminating the need for a separate payment processing service.
- PracticePanther has a built-in CRM, allowing your firm to manage intake and prospective clients.

## PRICING

- Solo - \$49 / User / Month
- Essential - \$69 / User / Month
- Business - \$89 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.

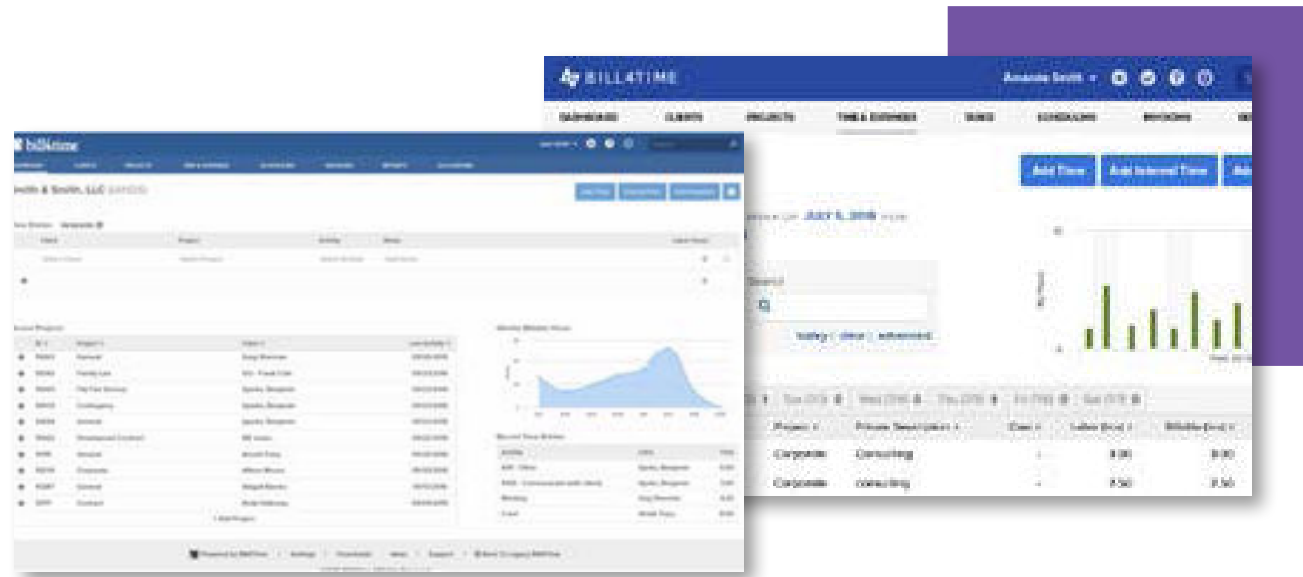
## FREE TRIAL

PracticePanther offers a free trial. [Try PracticePanther for Free Here.](#)

## GET PRACTICEPANTHER FOR YOUR FIRM

Ready to try PracticePanther? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

# Bill4Time



## OVERVIEW

Originally developed as a standalone time and billing application, Bill4Time has evolved into a comprehensive law practice management solution. It offers a range of features, including robust time and billing functionalities, matter management capabilities, support for ABA and LEDES billing codes, and trust/IOLTA accounting. With its expanded capabilities, Bill4Time now provides a holistic solution for law firms to effectively manage their practice, billing, and financial processes.

## WHO BILL4TIME IS GOOD FOR

Bill4Time is good for law firms that need additional flexibility around billing parameters and options. For instance, Bill4Time has a lot of nuance to how fees can be billed, including split billing or complex fee agreements. Bill4Time is also good for law firms that need comprehensive Trust/IOLTA accounting.

## DOCUMENT AND EMAIL MANAGEMENT

Bill4Time includes cloud storage with some document management features. To accommodate a substantial amount of historical data, it may be necessary to supplement Bill4Time's cloud storage and document management features. Basic cloud storage solutions like OneDrive or a comprehensive Document Management System (DMS) can be considered as additional resources for effective storage and organization. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- Robust, flexible and powerful time-tracking with customizable billing options.
- Trust/IOLTA accounting with built-in IOLTA reconciliation reports.
- Built-in Task Management to track to-do's and deadlines for each case.
- Bill4Time has several editions, including a low-cost 'Time & Billing' option for firms with more basic needs.

## PRICING

- Time & Billing - \$27 / User / Month
- Time & Billing Enterprise - \$67 / User / Month
- Legal Pro - \$45 / User / Month
- Legal Enterprise \$80 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.

## FREE TRIAL

Bill4Time offers a free trial. [Try Bill4Time for Free Here.](#)

## GET BILL4TIME FOR YOUR FIRM

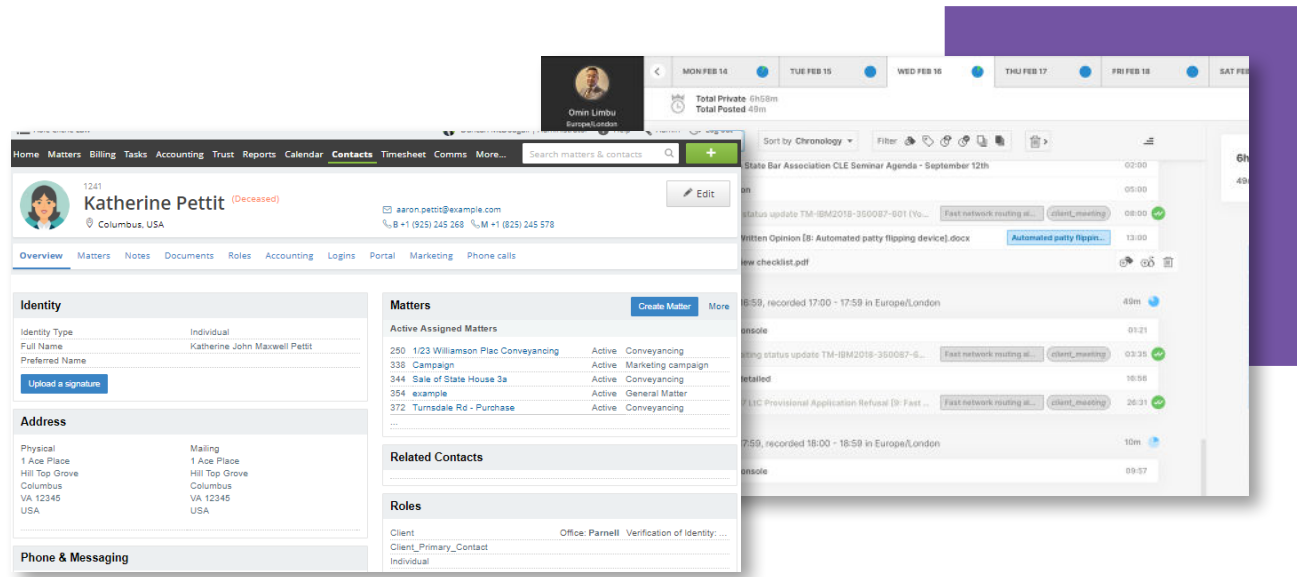
Ready to try Bill4Time? Uptime Legal can help. Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- ✔ Cloud Storage for Documents
- \* Document Management
- \* Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports

\* Available within a Private Cloud

# Actionstep



## OVERVIEW

Actionstep is a feature-rich and comprehensive cloud-based law firm management platform that connects, organizes, and automates all the work that happens at law firms. The platform is built to adapt to a firm's unique strengths and scale with their goals.

With connected capabilities like client intake, matter management, document management, time tracking, billing, legal accounting, and business reporting, Actionstep equips firms to do their work efficiently, delight clients, manage firm profitability, grow, and oversee their firm.

## Full Feature List

- ✔ Client & Contact Management
- ✔ Case / Matter Management
- ✔ Calendaring
- ✔ Conflict Checking
- ✔ Task Management
- ✔ Timekeeping
- ✔ Billing & Invoicing
- ✔ Form/Document Assembly
- ✔ Cloud Storage for Documents
- ✔ Document Management
- ✔ Email Management
- ✔ Business Accounting
- ✔ Trust Accounting
- ✔ Financial Reports

\* Available within a Private Cloud

## WHO ACTIONSTEP IS GOOD FOR

Actionstep is a Law Practice Management (LPM) software for midsize law firms seeking streamlined operations and comprehensive insights into their firm's activities.

Due to Actionstep's extensive capabilities, Actionstep requires a commitment for upfront setup for its full-scale practice management and legal accounting platform. To ensure the platform is optimized properly for an individual law firm, it typically requires the assistance of an implementation specialist.

## DOCUMENT AND EMAIL MANAGEMENT

Bill4Time includes cloud storage with some document management features. To accommodate a substantial amount of historical data, it may be necessary to supplement Bill4Time's cloud storage and document management features. Basic cloud storage solutions like OneDrive or a comprehensive Document Management System (DMS) can be considered as additional resources for effective storage and organization. See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- Case/Matter Management to streamline your firm's operations by unifying every aspect of matter management, from contacts and participant roles to calendaring, client data collection, and document management. Tailor your processes with custom matter types and data fields designed to meet the unique demands of your practice areas and clientele
- Robust Accounting and Trust features with Actionstep's comprehensive suite of accounting, billing, and time tracking features designed to meet the unique challenges and needs of law firms. Easily keep track of firm financials, productivity, and day-to-day accounting.
- Client Management allows you to manage your client services through every touchpoint at your firm with features like automated workflows and communications, secure client portals, inquiry follow-ups, and more.
- Document Management to access, edit, and store your legal documents within Actionstep. Access unlimited document storage, ensure documents are always backed up, automate document creation, scan legal documents directly into Actionstep, and more. Option to integrate with your preferred cloud storage tool such as Dropbox, Google Drive, and Box.

## PRICING

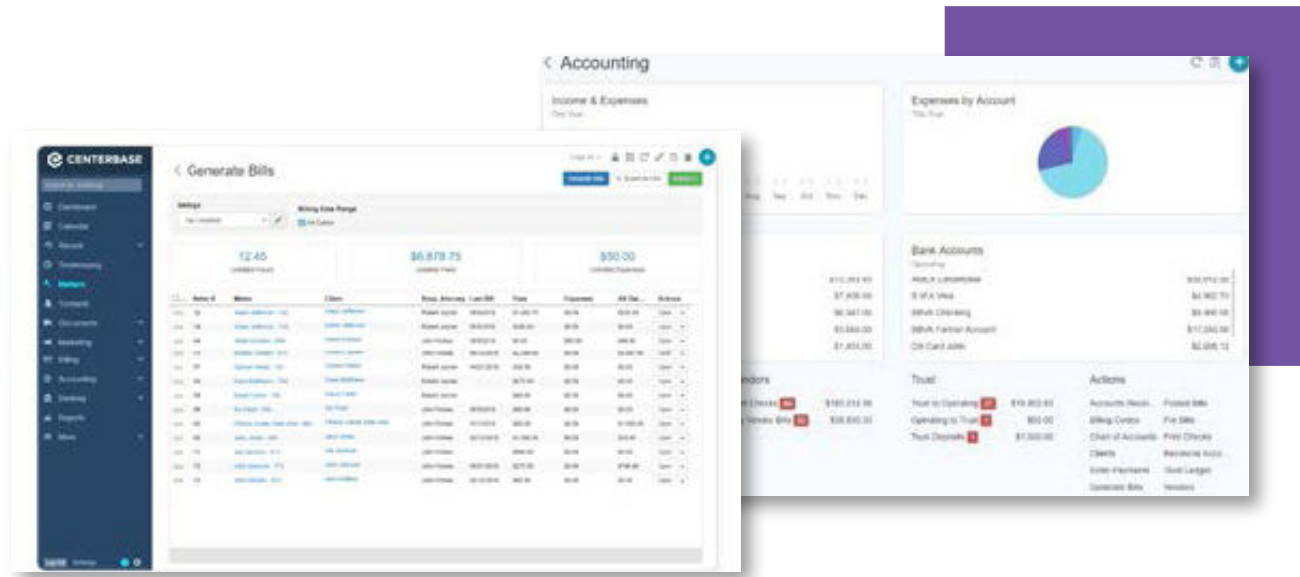
There are 3 pricing tiers (Practice Pro, Practice Pro + Accounting, and Premier). Pricing is not publicly available. For more information, you will need to [contact them directly](#).

## DOCUMENT AND EMAIL MANAGEMENT

Basic Document Management. You are able to store and organize your documents to find them easily later. You are also able to create documents through the use of templates and the integration with Microsoft Office.

However, for more advanced document creation, you will need a true Document Management System (DMS). See part 2 for more information on that.

# Centerbase



## OVERVIEW

Centerbase is a cloud-based Law Practice Management (LPM) system that offers a comprehensive suite of features. It includes time and billing functionalities, robust case and client management capabilities, and a full-fledged accounting module. Centerbase is widely recognized for its high level of customizability, allowing law firms to tailor the system to their specific needs. However, due to the intricacies of customization, it may be beneficial to engage an external consultant to assist with the process.

## WHO CENTERBASE IS GOOD FOR

Centerbase is an excellent choice for law firms that require highly customized practice management software and cannot rely on out-of-the-box solutions. It offers extensive customization options to tailor the software to their specific needs and workflows. Additionally, Centerbase serves as an all-in-one solution, combining practice management and accounting functionalities.

## DOCUMENT AND EMAIL MANAGEMENT

Centerbase combines cloud storage with some document management features. If your firm has a significant amount of historical data, you may need to supplement CenterBase with basic cloud storage, such as OneDrive, or with a comprehensive Document Management System (DMS). See Part 2 of this report to learn more about leading Document Management applications.

## PRODUCT HIGHLIGHTS

- RCenterbase is highly customizable, allowing you to create your own matter-specific workflows, and customize the look and fields for your matter screen.
- Centerbase has built-in accounting, which eliminates the need for separate accounting software, and keeps all of your data in a single application.
- Centerbase includes options with and without accounting, so your law firm can use what it needs (and leave what it doesn't).

## PRICING

Centerbase does not publish pricing publicly. Contact Centerbase directly or a partner, such as Uptime Legal, for pricing information.

## GET CENTERBASE FOR YOUR FIRM

Ready to try Centerbase? Uptime Legal can help.

Give us a call, our legal technology experts are ready to help you evaluate and implement law practice management solutions.

## Full Feature List

- ✔ Client & Contact Management
  - ✔ Case / Matter Management
  - ✔ Calendaring
  - ✔ Conflict Checking
  - ✔ Task Management
  - ✔ Timekeeping
  - ✔ Billing & Invoicing
  - ✔ Form/Document Assembly
  - ✔ Cloud Storage for Documents
  - \* Document Management
  - \* Email Management
  - ✔ Business Accounting
  - ✔ Trust Accounting
  - ✔ Financial Reports
- \* Available within a Private Cloud

# Law Practice Management Comparison Table

✓ Yes

— No

\* Available within a Private Cloud

	Client & Contact Management	Case / Matter Management	Calendaring	Conflict Checking	Task Management	Timekeeping	Billing & Invoicing	Form/ Document Assembly	Cloud Storage for Documents	Document Management	Email Management	Business Accounting	Trust Accounting	Financial Reports
<b>Clio Manage</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	—	—	—
<b>PCLaw</b>	✓	✓	✓	✓	✓	✓	✓	—	*	✓	✓	✓	✓	✓
<b>Tabs3</b>	✓	✓	✓	✓	✓	✓	✓	✓	*	✓	✓	✓	✓	✓
<b>ProLaw</b>	✓	✓	✓	✓	✓	✓	✓	✓	*	✓	✓	✓	✓	✓
<b>Time Matters</b>	✓	✓	✓	✓	✓	✓	✓	✓	*	✓	—	—	—	—
<b>Smokeball</b>	✓	✓	✓	—	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>LEAP</b>	✓	✓	✓	—	✓	✓	✓	✓	✓	*	*	—	✓	✓
<b>CosmoLex</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	✓	✓	✓
<b>Rocket Matter</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	—	✓	—
<b>MyCase</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	—	—	—
<b>Practice Panther</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	—	—	—
<b>Bill4Time</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	✓	✓	✓
<b>ActionStep</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Centerbase</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	*	*	✓	✓	✓

# Notes

## PART 2

# Legal Document Management Software

# 2

## How to Choose the Best Legal Document Management Software

Before getting into our list of the top Document Management software used by law firms in 2024, we'll first define what exactly Document Management Systems are, what they do, and how they differ from Practice Management software.

### Document Management Overview & Features

Generally speaking, Document Management Software, often called a Document Management System (DMS), is special software that stores your documents and provides tools to manage them.

The 'management' part of Document Management Software's capabilities is what differentiates it from basic on-premise file servers or simple cloud storage (Google Drive, OneDrive, Dropbox, etc.).

Document Management Software can either operate on-premise (installed on your own local servers) or can be cloud-based. The scope, features, and capabilities of any given Document Management System varies from product to product; though broadly speaking, DMS software performs the functions found on the next page.

We recommend using this list as your checklist to identify which features are "must-haves" for your law firm. This will help you quickly narrow the list of potential suitors down to a short list of the best Document Management software for your firm.



## Cloud-Based, On-Premise, Or Hosted Software

Finally, as you evaluate Document Management Software for your firm, consider the deployment that best suits your firm's needs. When it comes to Document Management Systems, what kind, and how to use the software, you generally have three options:

1. Web-based Software (Natively Cloud)
2. On-Premise Software (Server/desktop-based)
3. Hosted Software (Server-based software run within a Private Cloud)



### Cloud-Based Software

This includes those applications that are natively-cloud, which means you run them in a web browser. These applications tend to be newer than their on-premise counterparts and don't require a server (or in many cases—any software installation whatsoever). This makes them low-maintenance and accessible from anywhere.



### On-Premise Software

This includes DMS applications that are designed to be run in-house, on your own onsite servers, and accessed through desktop computers. These are the applications that, in many cases, have been around for decades. The downside of these applications is that they require your firm to own and maintain servers, which comes with its own various costs and headaches.



















### Hosted Software

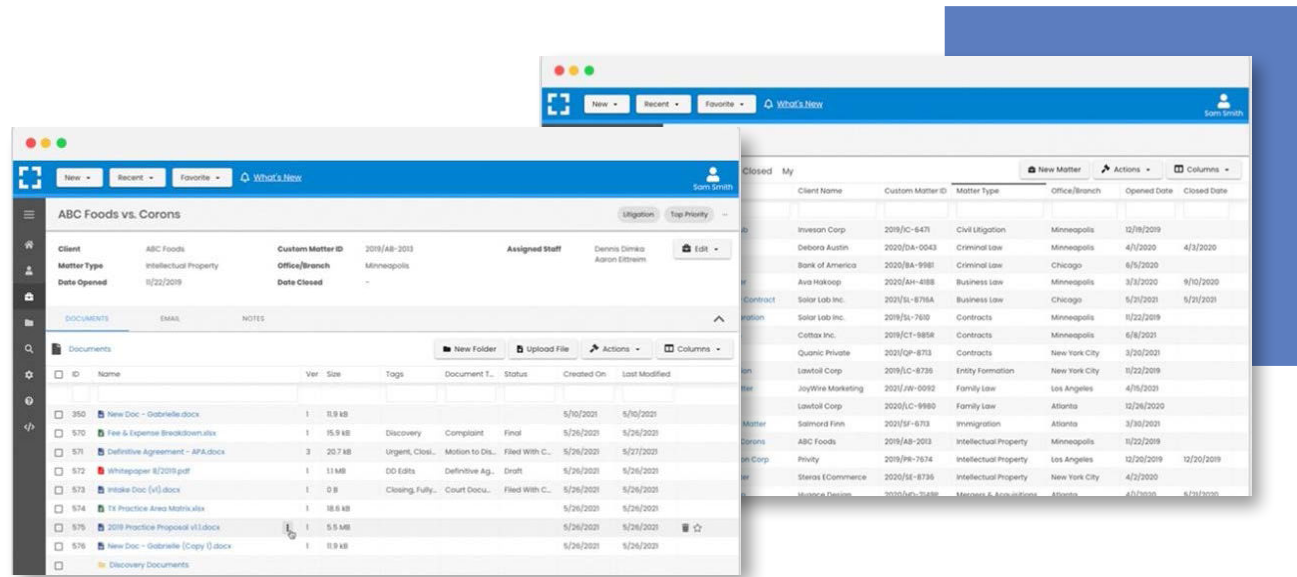
This is not a third category of software. Rather, it's the same On-Premise software we touched on earlier but is hosted in a secure private cloud instead of your own on-premise servers. A private cloud is an IT platform that will host your legal case management software (in many cases, your files/folders, email, and more). This gives you some of the benefits of the cloud (reliability, security, and mobility) without the downside of servers (costs, headache, and IT management). Refer to Appendix B of this report for more information on hosting premise-based software in a Private Cloud.

You can find this on page 55.

**Hint:** Download this report and click on the icons to the left of each feature to highlight it as a “must-have.”

-  **Document & File Storage**  
The basic storage of documents and other types of electronic files.
-  **Document Profiling / Metadata**  
The ability to apply attributes (metadata) to documents, including document classifications, types, tags, and the ability to apply internal notes to documents. For instance, the ability to classify a document as a contract or an order is document profiling.
-  **Full-Text Search**  
The ability to search across all documents (and sometimes email), with consideration of the file name, metadata, and content of documents.
-  **Unique Document ID**  
Every document is assigned a unique ID, which does not change even if the file name or location of the document does. This helps with document integrity and differentiation.
-  **Document Check-Out / In**  
The ability to check a document out, prohibiting others from changing it while the document is checked out to you.
-  **Microsoft Office Integration**  
Direct integration with the Office suite, typically including Microsoft Word and Outlook.
-  **Document Version Management**  
The automatic creation and tracking of versions of documents as they are changed.
-  **Email Management**  
The ability to easily save email messages to a matter, typically via an Outlook integration.
-  **Permissions & Access Management**  
The ability to permit (or restrict) access to particular matters or data within your firm.
-  **Favorite & Recent Documents**  
Quick and easy access to recently opened documents and the ability to “pin” documents as a favorite.
-  **Matter Notes**  
The ability to create and save Matter Notes within the DMS software.
-  **More modern, cloud-based Document Management Systems** sometimes include these more sophisticated features:
-  **Full Windows & Mac OS Compatibility**  
Native Windows and Mac support, without the need for virtualization software (such as parallels).
-  **Geographic Data Redundancy**  
Automatic replication/backup of your data to geographically redundant data centers.
-  **End-to-End Data Encryption**  
Full encryption of your data in-transit and at-rest, adding enhanced security and compliance.
-  **Multi-Factor Authentication**  
MFA means requiring a second factor to log into the system, which enhances security and compliance. This authentication is usually completed by entering a code from an app, a text/call, or an email.

# LexWorkplace



## OVERVIEW

LexWorkplace is a cloud-based, matter-centric Document Management System. It's useful for storing and organizing your documents, emails, and notes by matter to be easily indexed and found later. A standout feature of LexWorkplace is its compatibility with both Windows and Mac operating systems – the only DMS with this capability.

Using LexWorkplace has been made easy by being able to access it on any device, from any location, and with any feature that law firms need to stay organized and efficient.

## Full Feature List

- ✔ Cloud-based File Storage
- ✔ Client/Matter-Centric
- ✔ Organization
- ✔ Full-Text Search
- ✔ Unique Document ID
- ✔ Document Check-Out / In
- ✔ MS Office Integration
- ✔ Document Version Management
- ✔ Email Management
- ✔ Permissions/Access Management
- ✔ Favorite & Recent Documents
- ✔ Mater Notes
- ✔ Windows and MacOS
- ✔ Compatibility
- ✔ End-to-End Data Encryption
- ✔ Multi-Factor Authentication
- ✔ Geographic Data Redundancy
- ✳ Server/Infrastructure-Dependent

## WHO LEXWORKPLACE IS GOOD FOR

LexWorkplace is best for law firms of 3 to 50 total users. LexWorkplace is a good fit for law firms looking to move away from:

- Owning and Operating On-Premise File Servers
- Insufficient, Simplistic Cloud Storage
- Dated Legacy/On-Premise DMS Software

LexWorkplace is also a great option for firms that currently utilize Practice Management Software and would love to complement it with a DMS solution tailored for law firms.

## PRODUCT HIGHLIGHTS

- Simple yet robust document management for law firms to properly store documents in an intuitive, legal-centric organization.
- LexWorkplace includes powerful search functions that allow you to search the content, tags, and metadata of all documents and email stored in your firm's dedicated workspace.
- LexWorkplace prioritizes security by including end-to-end data encryption, multi-factor authentication, geographic data redundancy, and more security measures to ensure your and your clients' data is well-protected.
- In-house tools to improve document sharing and collaboration methods across your law firm.
- LexWorkplace is 100% natively compatible with Windows and Mac Operating Systems (unique to LexWorkplace).

## PRICING

LexWorkplace starts at \$395 / month, which includes 3 users and 1TB of storage. The company publishes pricing publicly on its website, [available here](#).

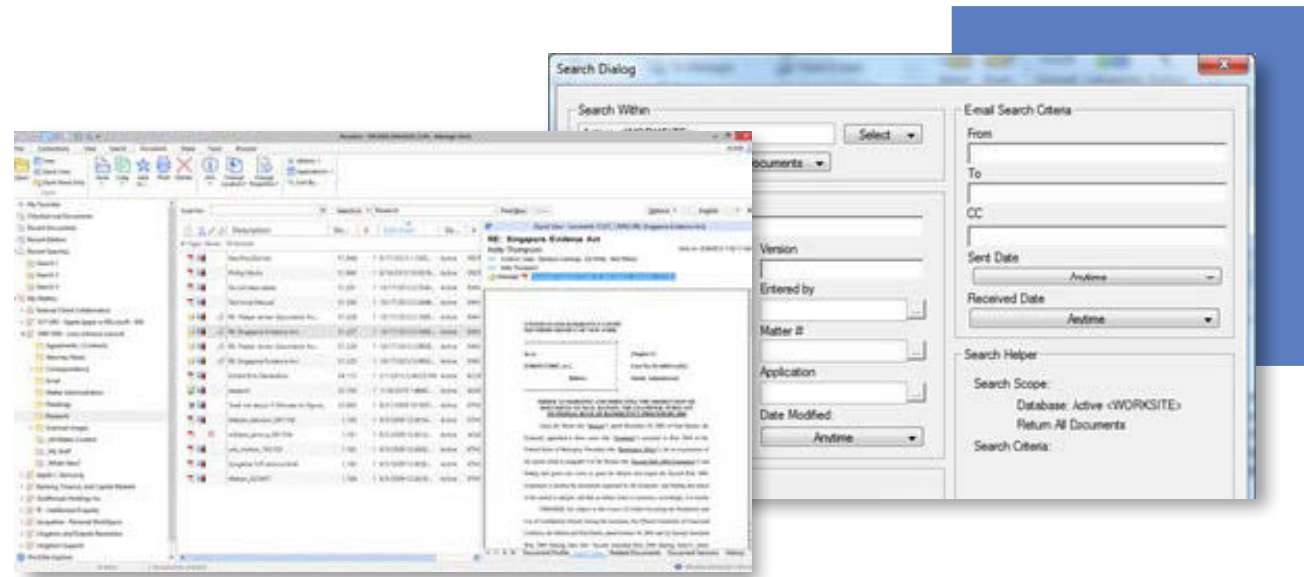
## DEMONSTRATION

Law firms can watch a demonstration video or schedule a [one-on-one demo here](#).

## WANT TO LEARN MORE ABOUT LEXWORKPLACE?

Give us a call, our legal technology experts are ready to help you evaluate and implement the right legal software for your firm. [Contact us here](#).

# iManage



## OVERVIEW

iManage Work is a long-running DMS that provides many functions to manage documents and email. It offers a robust index and search engine that operates seamlessly across both documents and emails.

It is worth noting that implementing and administering iManage does require significant server resources and specialized IT expertise. The system can be deployed on an in-house server or in a private cloud environment. However, due to its extensive features and technical requirements, some users may perceive iManage as large and occasionally burdensome to manage.

## Full Feature List

- ❌ Cloud-based File Storage
- ❌ Client/Matter-Centric Organization
- ✅ Full-Text Search
- ✅ Unique Document ID
- ✅ Document Check-Out / In
- ✅ MS Office Integration
- ✅ Document Version Management
- ✅ Email Management
- ❌ Server/Infrastructure-Dependent
- ✅ Permissions/Access Management
- ❌ Favorite & Recent Documents
- ❌ Mater Notes
- ❌ Windows and MacOS Compatibility
- ❌ End-to-End Data Encryption
- ❌ Multi-Factor Authentication
- ❌ Geographic Data Redundancy

## WHO iMANAGE IS GOOD FOR

iManage is particularly well-suited for large-scale firms, typically those with 50 or more users.

Due to its notable technical and infrastructure requirements, iManage makes more sense for law firms already equipped with in-house IT personnel who can effectively manage and support an on-premise document management software.

## PRODUCT HIGHLIGHTS

- iManage is one of the more robust Document Management Systems on the market. It has the capacity to store, organize, and search through all your documents.
- In particular, the search capability is a strong feature offered by iManage due to its maintained search index of all your documents, data, and emails you have stored within the system.
- Want the cloud? Luckily, iManage offers a hosted solution for its otherwise server-based software, thus providing the option to opt out of server ownership.

## PRICING

The company does not provide public pricing information. Potential customers must contact an iManage reseller to obtain pricing for the software and implementation.

## iMANAGE IN THE CLOUD

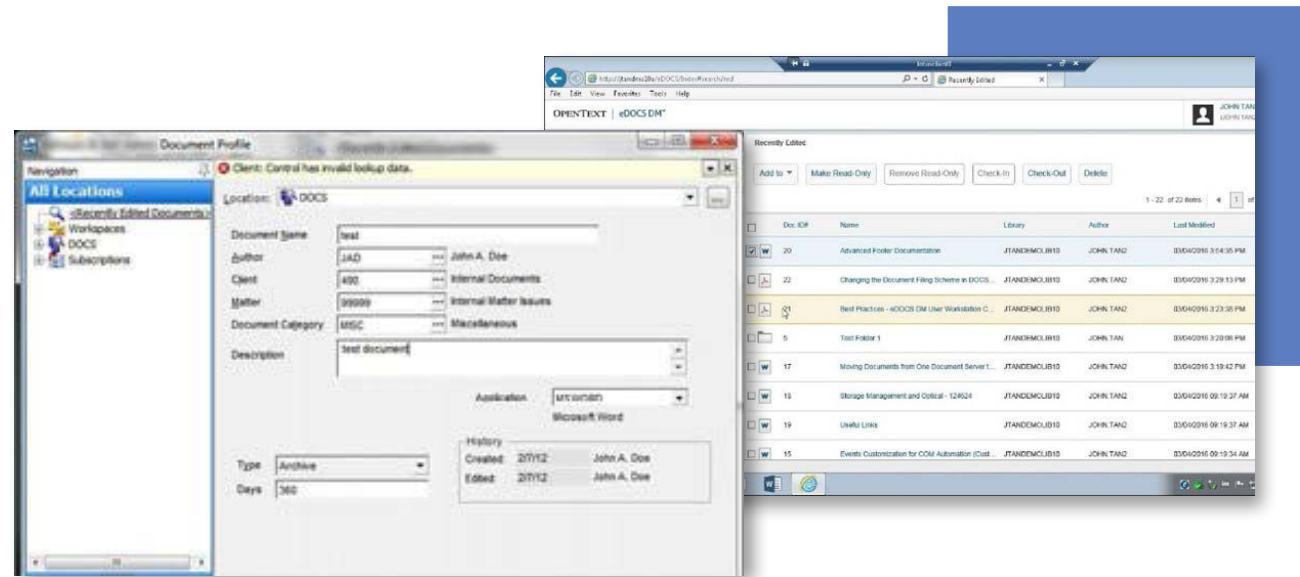
iManage Work is server-based, which means it can be run on your firm's on-premise servers or within a full-managed Private Cloud.

A Private Cloud, such as [Uptime Practice](#), will host your iManage, documents, emails, and other applications in a secure cloud workspace.

- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere

Learn more about [iManage in the Cloud](#)

# eDOCS



## OVERVIEW

OpenText eDOCS, previously known as Hummingbird, has established itself as a longstanding Enterprise Content Management (ECM) system that caters to various industries, including law firms.

With its fundamental Document Management and Records Management functionalities, eDOCS has become a favored choice among legal departments in larger organizations.

Over time, eDocs has introduced an interface that users can customize to their preferences using a tile-based layout. This user-customizable interface enhances usability.

## WHO EDOCS IS GOOD FOR

Unlike traditional Legal Document Management platforms, eDOCS distinguishes itself as an Enterprise Content Management (ECM) system.

While it serves the needs of in-house legal teams, eDOCS also extends its functionality to professional services firms and government entities. This broader scope enables eDOCS to cater to the diverse requirements of organizations across different industries and sectors, providing a robust solution for content management and collaboration.

## PRODUCT HIGHLIGHTS

- Within the eDOCS system, you have access to document lifecycle services that enable you to create personalized document workflows tailored to your specific needs.
- As a component of the comprehensive suite provided by OpenText, eDOCS seamlessly integrates with other software solutions, such as search tools, scanning capabilities, image management systems, and Business Process Management tools.

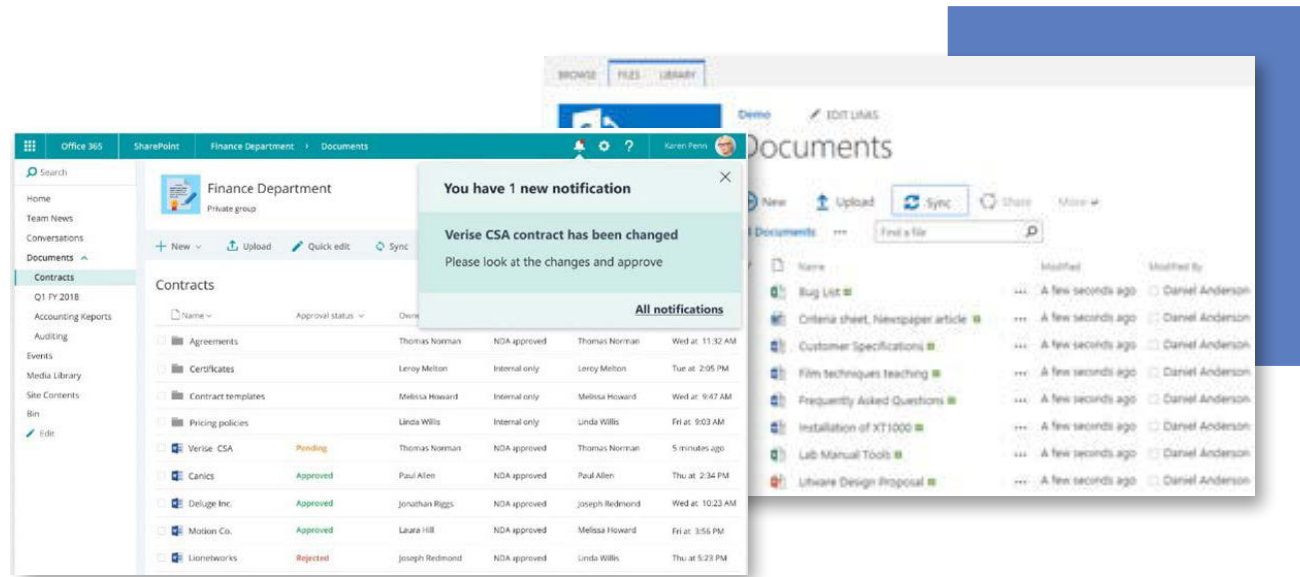
## PRICING

The company does not provide public pricing information. Potential customers should [contact OpenText](#) directly for a proposal for the eDOCS software and implementation.

## Full Feature List

- ❌ Cloud-based File Storage
- ❌ Client/Matter-Centric Organization
- ✅ Full-Text Search
- ✅ Unique Document ID
- ✅ Document Check-Out / In
- ✅ MS Office Integration
- ✅ Document Version Management
- ✅ Email Management
- ❌ Server/Infrastructure-Dependent
- ✅ Permissions/Access Management
- ❌ Favorite & Recent Documents
- ❌ Mater Notes
- ❌ Windows and MacOS Compatibility
- ❌ End-to-End Data Encryption
- ❌ Multi-Factor Authentication
- ❌ Geographic Data Redundancy

# SharePoint



## WHO SHAREPOINT IS GOOD FOR

SharePoint is well-suited for law firms seeking an all-in-one application that combines intranet, cloud storage, and document management. It also offers extensive customization options, making it ideal for law firms with specific and/or extensive requirements in their Document Management System. SharePoint

## PRODUCT HIGHLIGHTS

- For many law firms, SharePoint is available at no extra cost since it's included in most Office 365 subscriptions.
- SharePoint is a versatile platform, but it's not a tool specific to law firms. For proper customization, engaging a SharePoint expert or an IT consulting firm is necessary to tailor SharePoint to suit the specific needs of a law firm.
- SharePoint can be seen as an advanced version of OneDrive. This results in features beyond basic cloud storage but not quite meeting what you would expect from a true to form Document Management System.
- As a Microsoft product, SharePoint benefits from strong support from their technology community.

## OVERVIEW

SharePoint, a well-established intranet and CMS (Content Management System), is widely utilized across diverse industries. While SharePoint offers a range of functionalities, it also includes some features found in Document Management Systems (DMS). These features allow SharePoint to act as a lightweight DMS capable of being customized for law firms.

## ABOUT THE COMPANY

SharePoint is an integral component of the Microsoft 365 suite, previously known as Office 365. Developed by Microsoft, SharePoint is a cloud-based set of productivity tools designed to enhance collaboration and facilitate document management within organizations.

## PRICING

SharePoint is included in most levels of Microsoft 365 / Office 365. Refer to [Microsoft 365 packages and tiers](#) for more information.

## Full Feature List

- ➖ Cloud-based File Storage
- ✳️ Client/Matter-Centric Organization
- ✅ Full-Text Search
- ✅ Unique Document ID
- ✅ Document Check-Out / In
- ✅ MS Office Integration
- ✅ Document Version Management
- ➖ Email Management
- ✳️ Server/Infrastructure-Dependent
- ✅ Permissions/Access Management
- ✳️ Favorite & Recent Documents
- ✳️ Mater Notes
- ➖ Windows and MacOS Compatibility
- ✅ End-to-End Data Encryption
- ✅ Multi-Factor Authentication
- ➖ Geographic Data Redundancy

# What happened to Worldox?

As you may have noticed, this year's Legal Software Report doesn't list Worldox.

Worldox has been a long-standing, server-based document management software for law firms for years. Many law firms adopted it early on, when there were even fewer options for document management software, and just never left.

Well, Worldox was recently acquired, so users are left with the decision to either follow the acquisition or to seek another solution.

Neither decision is wrong, and both come with their own advantages and hurdles.

The solution, in line with the spirit of why this Legal Software Report exists to begin with, is to evaluate your options and determine which move is the best for your law firm.

One helpful note I can universally provide is to remember the pitfalls you experienced when using Worldox. As robust as Worldox was for years, it lacked the modernity that law firms today require to effectively manage their documents and create a workflow that gives way to better collaboration, organization, and overall experience.

As always, if you want or need help deciding, Uptime Legal is more than happy to consult with you to ensure your step in the right direction. [Contact us here.](#)

## Document Management Software Comparison Table

✓ Yes

— No

\* Server/Infrastructure-Dependent

	Cloud-based File Storage	Client/Matter-Centric Organization	Full-Text Search	Unique Document ID	Document Check-Out/In	MS Office Integration	Document Version Management	Email Management	Permissions/Access Management	Favorite & Recent Documents	Matter Notes	Windows & Mac OS Compatibility	End-to-End Data Encryption	Multi-Factor Authentication	Geographic Data Redundancy
<b>LexWorkplace</b>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>iManage</b>	—	—	✓	✓	✓	✓	✓	✓	✓	—	—	—	*	*	*
<b>eDOCS</b>	—	—	✓	✓	✓	✓	✓	✓	✓	—	—	—	*	*	*
<b>SharePoint</b>	✓	*	✓	✓	✓	✓	✓	—	✓	*	*	—	✓	✓	—



# Notes

## PART 3

# Intake & CRM Software

# 3

## How to Choose the Best Legal CRM & Intake Software

Selecting the ideal CRM and Intake Software is a strategic move to better manage and grow your client relationships. This software should not only ease the management of new leads but also enhance your interactions with current clients.

As you fold this system into your broader tech stack, look for features that scale with your firm's growth, integrate smoothly with your existing setups like Practice Management and Document Management Systems, and improve upon your current client processes.

Equally important is the software's compliance with data security standards and its user-experience—features that ensure your team can fully capitalize on its functionality.

### Legal CRM & Intake Overview

Imagine this sales funnel:








- Initial Contact (Form or Phone Call)
- Sales Qualified Lead
- Clients
- Ongoing Communication
- Potential for Upselling/Long-Term Solidification







This is a typical sales funnel for a law firm.

Good Legal CRM/Intake Software helps you manage this process to provide the best possible journey for your leads to become happy clients.

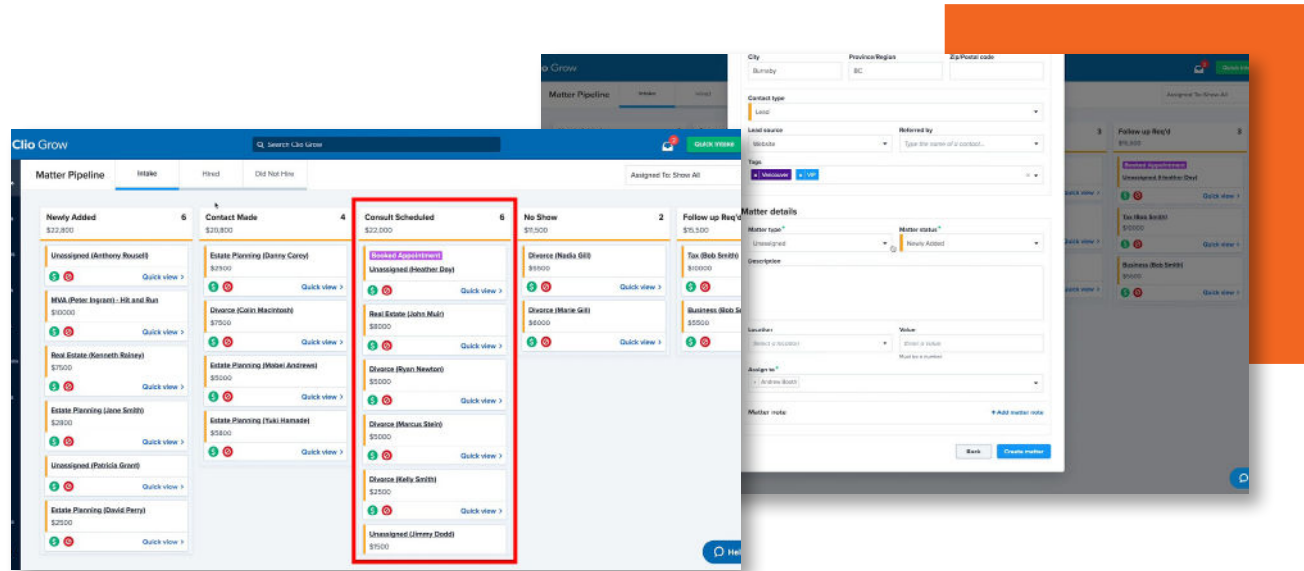
They do this through these key features that we recommend considering as you think about the best CRM for your law firm.

**Hint:** Download this report and click on the icons to the left of each feature to highlight it as a “must-have.”

- 
**Sales CRM (Managing Clients)**  
 The database of clients that you can utilize for tracking progress, interactions, lead warmth, and otherwise managing your relationships with clients.
- 
**Automated Workflows**  
 Automating workflows allows firms to streamline processes such as email sequences, sending intake forms or gathering information, onboarding, reminders, invitations, and more.
- 
**Custom Forms**  
 Create forms to collect information and intake new leads into your CRM. This ranges from simple ‘Contact Us’ forms to more robust intake forms for specific types of matters. Customizable forms allow you to gather information through your preferred design, function, and location of the form.
- 
**Email Marketing Campaigns**  
 Sending sequential, intermittent, or one-off emails to market your services.
- 
**Conflict Checking**  
 The ability to check for specific names or subjects during a conflict-of-interest check.
- 
**Event Management**  
 Organize and track events, manage invites, RSVPs, and follow-ups all within the CRM, streamlining the entire event process.
- 
**Appointment Scheduler**  
 The ability to connect your calendar and allow clients (potential and current) to pick a day and time that works for both of you allows easier scheduling and provides a smoother process.

- 
**Practice Management Integration**  
 Communication between your CRM and Practice Management Software to ensure seamless reporting, analysis, and proper/accurate functioning of both systems.
- 
**Reporting & Insights**  
 Gathering of information about the leads coming in to determine what is working, what isn't, and to generally understand the clientele you are attracting and have retained.
- 
**Custom Dashboards**  
 Create personalized views of key metrics and data, allowing for real-time insights tailored to individual needs.
- 
**Client Engagement**  
 The ability to text, email, or otherwise communicate with clients (manually or automatically). Can be one-way or two-way communication.
- 
**E-Signature**  
 It can be a real hassle to only be able to sign documents in person. eSignature software saves a lot of time by allowing firms to send documents, have them signed, and get them back – all virtually.
- 
**Document Templates**  
 Whether it be email or document templates, being able to utilize templates is a great way to save time and effort.

# Clio Grow



## OVERVIEW

Clio Grow is a key component of Clio’s extensive suite of legal software, specifically tailored for client relationship management (CRM) and client intake processes. Designed to function seamlessly both as a standalone product and when integrated with Clio Manage, Clio Grow optimizes the entire client lifecycle from initial contact to case conclusion.

This integration enhances productivity by syncing client data across both platforms, reducing redundancy and ensuring consistency. Clio Grow excels in managing client interactions, automating intake processes, and ultimately driving firm growth through efficient lead management.

## WHO CLIO GROW IS GOOD FOR

Clio Grow is good for people who already use Clio Manage as Practice Management Software because they integrate well with each other. It’s also rather simple, so people who prefer to have simplistic interfaces and features will enjoy it.

On a similar note, it’s best for smaller law firms consisting of solo endeavors, startups, and law firms with less than 10 total timekeepers.

## PRODUCT HIGHLIGHTS

- Seamlessly integrates with Clio Grow to combine CRM and practice management functionalities, enhancing workflow and data consistency across platforms.
- Supports extensive billing and payment collection capabilities, allowing for direct payment processing upon completion of consultations.
- Offers robust integration with major software such as Google and QuickBooks, ensuring a streamlined operational flow.
- Features a user-friendly interface that simplifies adoption and daily use, making it accessible for all tech proficiency levels.
- Provides advanced data analytics and customizable financial reporting tools to help law firms track performance and make data-driven decisions.

## PRICING

Clio Grow is available as an add-on for most plans at \$59 / User / Month. Pricing is based on an annual subscription and is accurate as of the publication of this report.

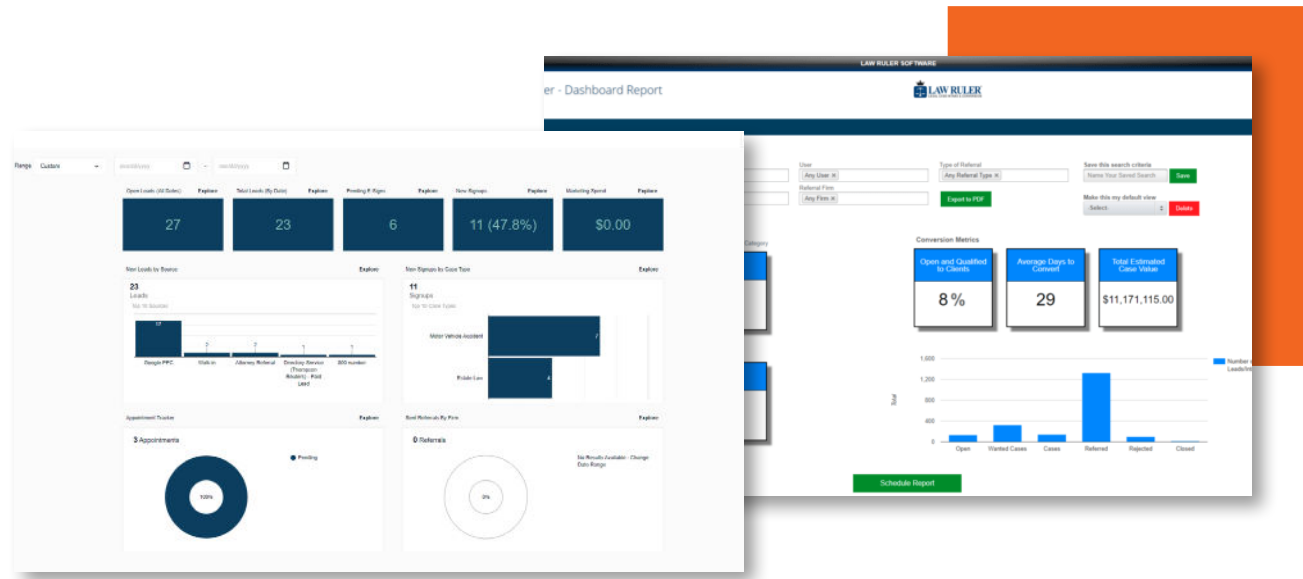
## FREE TRIAL

Clio offers a free trial. [Try Clio for free here.](#)

## Full Feature List

- ✔ Sales CRM
- ✔ Automated workflows
- ✔ Custom forms
- ✔ Email marketing campaigns
- ✖ Conflict checking
- ✔ Event management
- ✔ Appointment scheduler
- ✔ Practice management
- ✔ integration
- ✔ Reporting & insights
- ✔ Custom dashboards
- ✔ Client engagement
- ✔ E-signature
- ✔ Document templates

# Law Ruler



## OVERVIEW

Law Ruler, from ProfitSolv, serves as a dynamic Legal CRM, Client Intake, and Marketing Automation software, designed specifically for law firms.

This cloud-based platform is known for its robust integrations, making it exceptionally easy to weave into your existing technological framework.

## WHO LAW RULER IS GOOD FOR

Law Ruler is particularly valuable for high-volume law firms that require efficient systems to track leads, manage client relationships, and streamline marketing efforts. Its straightforward interface and powerful features make it ideal for firms that prioritize functionality and ease of use.

## PRODUCT HIGHLIGHTS

- Features numerous integrations, notably with CosmoLex and Rocket Matter, enhancing its utility within a broader legal software ecosystem.
- Offers SMS capabilities for immediate contact with leads, facilitating quick and effective client communication.
- Provides robust lead tracking and enhances marketing efforts through seamless integration with existing tools.
- Specializes in client intake forms, streamlining the process of client data collection and management.
- Equipped with comprehensive data analytics and ROI reporting tools to evaluate marketing effectiveness and client engagement.

## PRICING

The company does not provide public pricing information. Potential customers should [contact Law Ruler](#) directly for pricing.

## Full Feature List

- ✓ Sales CRM
- ✓ Automated workflows
- ✓ Custom forms
- ✓ Email marketing campaigns
- ✓ Conflict checking
- ✓ Event management
- ✓ Appointment scheduler
- ✓ Practice management
- ✓ integration
- ✓ Reporting & insights
- ✓ Custom dashboards
- ✓ Client engagement
- ✓ E-signature
- ✓ Document templates

# Lawmatics



## OVERVIEW

Lawmatics is a legal-specific CRM designed to engineer a new era of the legal client experience.

With best-in-class tools for marketing automation, legal client intake, and performance analytics, Lawmatics helps law firms streamline their operations, delight clients, grow profitability, and win more business – all in one easy-to-use software

## WHO LAW RULER IS GOOD FOR

Law Ruler is particularly valuable for high-volume law firms that require efficient systems to track leads, manage client relationships, and streamline marketing efforts. Its straightforward interface and powerful features make it ideal for firms that prioritize functionality and ease of use.

## PRODUCT HIGHLIGHTS

- Offers extensive automation capabilities for streamlining client intake, follow-up processes, and marketing campaigns.
- Features a robust suite of marketing tools, including a client portal that facilitates secure and efficient client communication.
- Provides comprehensive lead tracking and integrations with existing marketing efforts to enhance client engagement.
- Equipped with data analytics and ROI reports for measuring marketing effectiveness and operational efficiency.
- Specializes in client intake forms, making data collection seamless and integrated.

## PRICING

The company does not provide public pricing information. Potential customers should [contact Lawmatics](#) directly for pricing and to schedule a free live demo.

## Full Feature List

- ✔ Sales CRM
- ✔ Automated workflows
- ✔ Custom forms
- ✔ Email marketing campaigns
- ✔ Conflict checking
- ✔ Event management
- ✔ Appointment scheduler
- ✔ Practice management
- ✔ integration
- ✔ Reporting & insights
- ✔ Custom dashboards
- ✔ Client engagement
- ✔ E-signature
- ✔ Document templates

### CRM Feature Comparison Table

✔ Yes      ✖ No

	Sales CRM	Automated workflows	Custom forms	Email marketing campaigns	Conflict checking	Event management	Appointment scheduler	Practice management integration	Reporting & insights	Custom dashboards	Client engagement	E-signature	Document templates
<b>Clio Grow</b>	✔	✔	✔	✔	✖	✔	✔	✔	✔	✔	✔	✔	✔
<b>Law Ruler</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
<b>Lawmatics</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔

# Notes



## PART 4

# Legal Accounting Software

# 4

## How to Choose the Best Legal Accounting Software

Choosing the right legal accounting software is crucial for law firms due to the unique financial and compliance demands of the legal industry.

By focusing on key aspects, you can select a software that not only streamlines financial operations but also supports your firm's growth and legal compliance.

### Legal Accounting Software Overview & Features

Legal accounting software caters specifically to the financial management needs of law firms. It helps ensure compliance with industry standards through features such as detailed financial reporting and trust/IOLTA accounting.

Effective software supports a firm's operational efficiency and reduces the risk of non-compliance, which is crucial for maintaining a firm's reputation and legal standing.

Key features include trust/IOLTA accounting, which is crucial for managing client funds, and diverse billing options such as hourly, fixed fee, and contingency, to accommodate different client agreements. The software also supports comprehensive financial reporting tailored to legal practices.

Additionally, integration with practice management systems streamlines operations, merging financial management with case and client data for enhanced efficiency.

## On-Premise, Cloud-Based, or Hosted Software

When selecting legal accounting software, law firms have three primary types of deployment options to consider, each with distinct characteristics and benefits.

Understanding the differences between these options is crucial for choosing a solution that aligns with your firm's technology strategy and operational needs.

The first two options describe the software itself while the third option describes a method you can use to host on-premise software in the cloud.

1. On-Premise Software (Server/Desktop-Based)
2. Cloud-Based Software (Natively Cloud)
3. Hosted Software (Server-Based Software Run Within a Private Cloud)



### On-Premise Software

On-premise software is installed and operates directly on your law firm's own servers and infrastructure, providing full control over data and security. This makes it the go-to option for firms needing tight data control or extensive customization.

However, it's not without its challenges. This setup requires a hefty initial investment in IT hardware, plus ongoing costs for maintenance, updates, and security. Only firms with robust IT support should consider this route, as they will need dedicated resources to manage and troubleshoot the system effectively.



### Cloud-Based Software

Cloud-based software, hosted on the vendor's servers and accessible over the internet, offers remarkable flexibility and scalability. This setup is perfect for enabling remote work, as it allows users to access the software from anywhere while the provider handles updates and backups.

It's often more budget-friendly too, with lower upfront costs and predictable monthly fees. The trade-off? Firms have to depend on the vendor's security protocols and may find their options for data management and customization somewhat limited compared to on-premise solutions.

Cloud-based systems are especially beneficial for firms prioritizing ease of use, minimal IT overhead, and improved collaboration.





### Hosted Software


Hosted software solutions strike a balance, running on-premise software on servers managed by a third-party provider. This hybrid approach marries the customization and control of on-premise software with the accessibility and maintenance ease of cloud solutions. It lightens the IT burden while still allowing firms to govern their software's functionality and data closely.


While hosted solutions generally offer better performance and reliability, they can be costlier over time compared to pure cloud options. This model is ideal for firms that desire the deep customization of on-premise solutions but prefer to sidestep the complexities associated with managing extensive IT infrastructure.


**Hint:** Download this report and click on the icons to the left of each feature to highlight it as a “must-have.”


- 


**General/Business Accounting**  
Essential tools for managing the firm’s revenues, expenses, and overall financial health.
- 


**Trust/IOLTA Accounting**  
Specialized features to handle client funds in trust accounts with strict compliance and reporting.
- 


**Cash Basis & Accrual Accounting**  
Flexibility to choose between accounting methods based on the firm’s financial strategies.
- 


**Multiple Billing Types**  
Support for various billing arrangements including hourly, fixed fee, and contingency.
- 


**Law Firm-Centric Financial Reporting**  
Customized reporting tools that provide insights tailored to the specifics of legal operations.
- 


**Chart of Accounts / General Ledger**  
Comprehensive tools for categorizing financial transactions and maintaining systematic records.
- 


**Profit & Loss / Balance Sheet**  
Detailed financial statements to assess the firm’s financial status at any point in time.
- 


**Bank and Operating Account Management**  
Manage all firm banking transactions and reconciliations efficiently.
- 

**Online Banking Integration**  
Seamlessly connect with banking institutions for up-to-date transaction data.
- 

**Credit Card Management**  
Tools to manage and reconcile firm credit card transactions.
- 

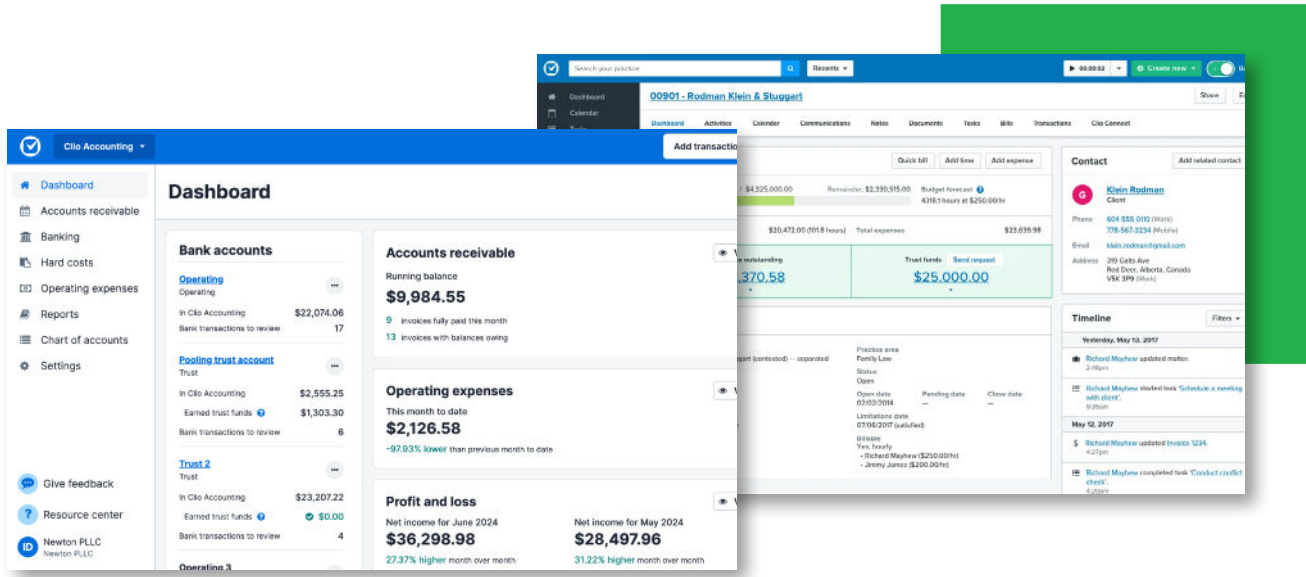
**Expense Tracking**  
Monitor and categorize firm expenses to maintain accurate financial records.
- 

**Tax Reporting**  
Features to assist with the preparation and filing of tax returns, ensuring compliance with tax regulations.
- 

**Trust Accounting with Three-Way Reconciliation**  
Advanced trust accounting capabilities to ensure accuracy and compliance with legal standards.
- 

**Amortization Functions**  
Handle complex calculations related to the gradual reduction of loan or debt amounts.

# Clio Accounting



**WHO CLIO IS GOOD FOR**  
 Ideal for small to mid-sized law firms, particularly those already using Clio Manage. Clio Accounting is especially beneficial for firms that require a straightforward, legally compliant accounting system that integrates seamlessly with their case management and payment systems.

- PRODUCT HIGHLIGHTS**
- **Integrated Financial Management:** Combines billing, payments, and accounting into one coherent system, simplifying financial oversight and reducing administrative burdens.
  - **Trust Accounting Compliance:** Ensures law firms meet strict compliance standards for client funds with automated checks and balances.
  - **Advanced Financial Reporting:** Provides real-time financial insights and comprehensive reporting capabilities to support strategic business decisions.
  - **Seamless Integration with Clio Manage:** Links directly with Clio Manage to streamline workflows and improve data accuracy across billing and accounting functions.

**OVERVIEW**  
 Clio Accounting is tailored specifically for legal professionals, providing an intuitive and compliant financial management platform that integrates seamlessly with Clio Manage and Clio Payments, all in the cloud.

This legal-specific accounting solution simplifies financial operations, minimizes the risk of errors, and ensures compliance with trust accounting regulations, all within a single system designed to meet the unique needs of law firms.

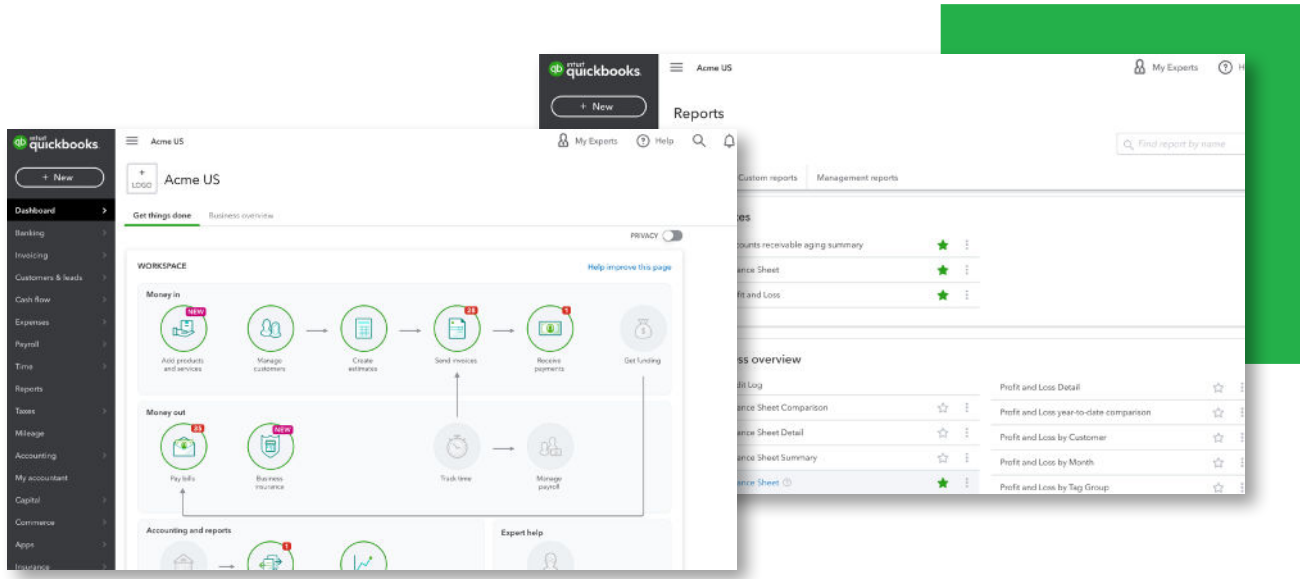
- PRICING**  
 These annual plans display practice management pricing with the ability to add Clio Accounting on.
- Essentials: \$79 / User / Month
  - Advanced: \$109/ User / Month
  - Complete: \$139/ User / Month

**FREE TRIAL**  
 Clio offers a free trial. [Try Clio for free here.](#)

## Full Feature List

- ✓ General/Business Accounting
- ✓ Trust/IOLTA Accounting
- ✓ Cash Basis & Accrual Accounting
- ✓ Multiple Billing Types
- ✓ Law Firm-Centric Financial Reporting
- ✓ Chart of Accounts / General Ledger
- ✓ Profit & Loss / Balance Sheet
- ✓ Bank and Operating Account Management
- ✓ Online Banking Integration
- ✓ Credit Card Management
- ✓ Expense Tracking
- ✓ Tax Reporting
- ✓ Trust Accounting with Three-Way Reconciliation
- ✓ Amortization Functions

# QuickBooks



## OVERVIEW

QuickBooks, developed by Intuit, stands as a hallmark in the accounting software arena due to its robust, user-friendly design that caters to a wide audience. While not specifically tailored for law firms, QuickBooks offers a comprehensive set of features that can serve basic legal accounting needs effectively.

It is available in both desktop and cloud-based versions, allowing firms to choose the format that best fits their operational style.

## WHO QUICKBOOKS IS GOOD FOR

QuickBooks is suitable for law firms that do not require specialized legal accounting features. It's especially beneficial for small to medium-sized law firms and legal practitioners who need a reliable, easy-to-use financial management system that integrates well with other tools.

## PRODUCT HIGHLIGHTS

- QuickBooks features extensive tools for managing finances, including invoicing, payroll, and expense tracking.
- The software is available in both desktop and online versions to accommodate different business needs.
- It integrates easily with other applications, including legal practice management software, enhancing workflow and data synchronization.
- Designed with a user-friendly interface, QuickBooks is accessible for non-accountants, simplifying navigational procedures.

## QUICKBOOKS IN THE CLOUD

QuickBooks Online brings the robust functionality of its desktop counterpart to the cloud, offering advantages such as real-time data access, seamless updates, and secure, scalable solutions for businesses that prefer online operations. This version supports remote work dynamics, providing a platform where team collaboration and external accountant access are facilitated efficiently.

## PRICING

- QuickBooks Desktop: Starts at \$1922 / Year (40-User Package)
- QuickBooks Online (Essentials): Starts at \$32.50 / User / Month

## FREE TRIAL

QuickBooks offers a free trial. [Try QuickBooks for free here.](#)

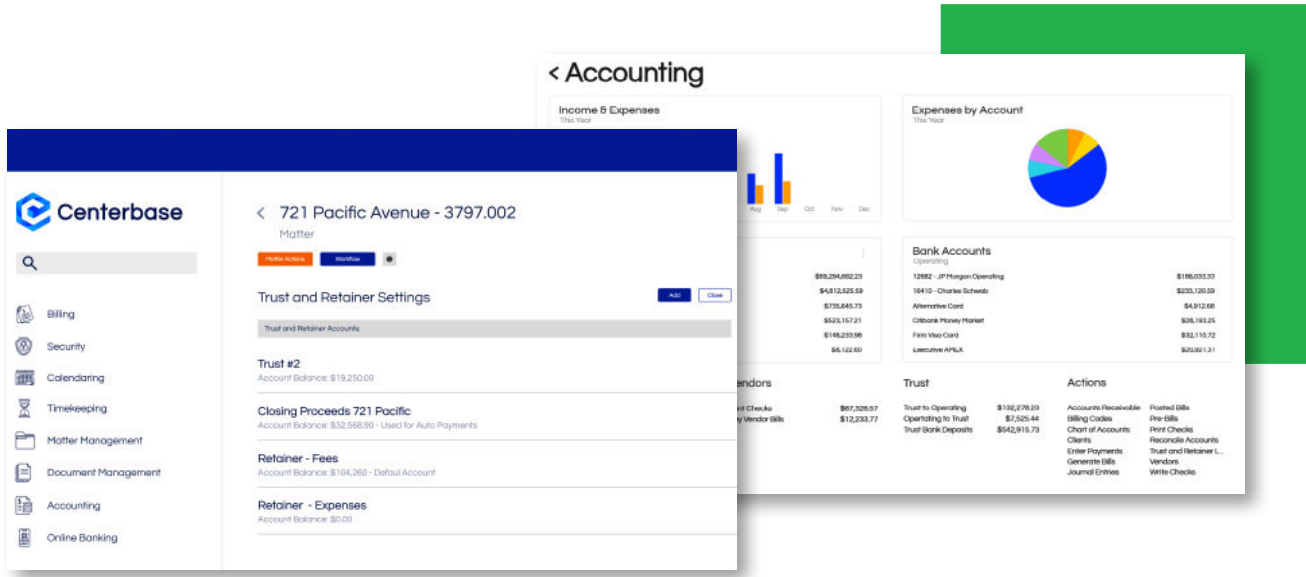
## ADDITIONAL RESOURCES:

Learn more about [QuickBooks in the Cloud](#)  
 Article: [How to Use QuickBooks In the Cloud](#)  
 Review: [Full QuickBooks Review for Law Firms](#)

## Full Feature List

- |  |  |
|--|--|
| ✔ General/Business Accounting          | ✔ Bank and Operating Account Management          |
| ✘ Trust/IOLTA Accounting               | ✔ Online Banking Integration                     |
| ✔ Cash Basis & Accrual Accounting      | ✔ Credit Card Management                         |
| ✔ Multiple Billing Types               | ✔ Expense Tracking                               |
| ✘ Law Firm-Centric Financial Reporting | ✔ Tax Reporting                                  |
| ✔ Chart of Accounts / General Ledger   | ✘ Trust Accounting with Three-Way Reconciliation |
| ✔ Profit & Loss / Balance Sheet        | ✘ Amortization Functions                         |

# Centerbase



## OVERVIEW

Centerbase is a cloud-based Law Practice Management (LPM) system known for its extensive customization capabilities and comprehensive suite that includes time and billing, case and client management, and a full accounting system.

Described as “Mission Control for your Law Firm,” Centerbase integrates various management functions into a single, customizable platform, making it a versatile choice for modern law firms.

## WHO CENTERBASE IS GOOD FOR

Centerbase is particularly suitable for mid-sized to larger law firms that require a customizable legal practice management solution. Its flexibility in customization allows it to cater to the specific needs of a firm, though sometimes at the cost of involving external consultants for setup and customization.

## PRODUCT HIGHLIGHTS

- Centerbase offers complete business and trust accounting, eliminating the need for separate accounting software.
- The platform includes comprehensive contact/client/matter management tools that streamline workflow and increase efficiency.
- It features highly customizable workflows, which can be tailored to fit the unique processes of any law firm.
- The system supports a range of billing methods, accommodating various client billing arrangements seamlessly.

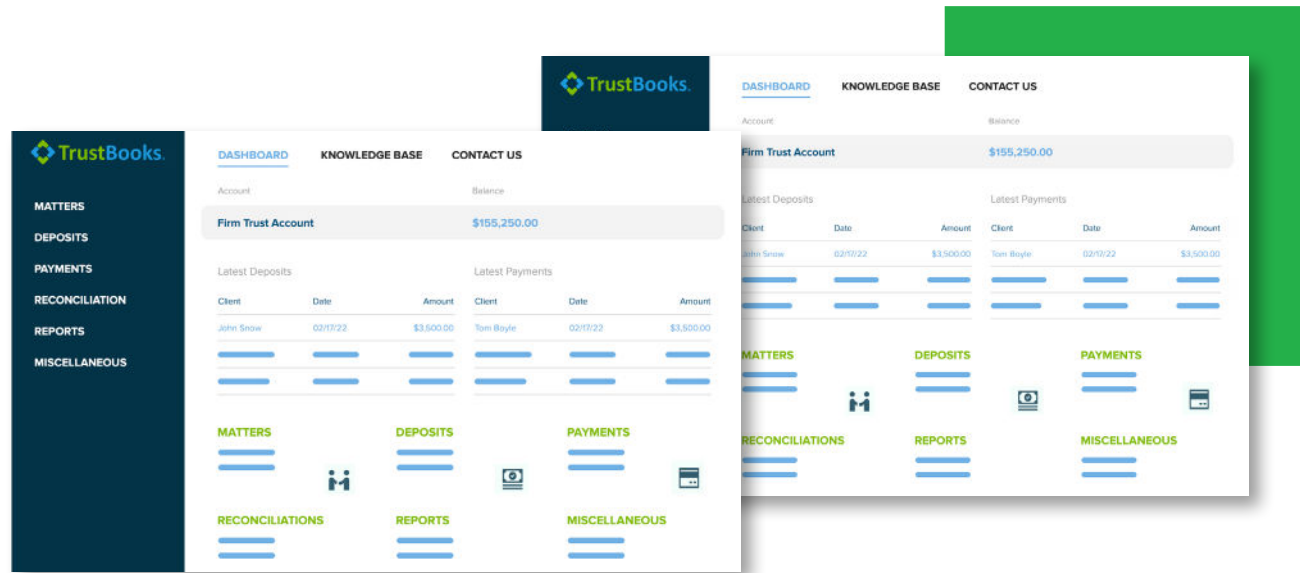
## PRICING

Centerbase does not publish pricing publicly. Contact Centerbase directly or a partner, such as Uptime Legal, for pricing information.

## Full Feature List

- ✓ General/Business Accounting
- ✓ Trust/IOLTA Accounting
- ✓ Cash Basis & Accrual Accounting
- ✓ Multiple Billing Types
- ✓ Law Firm-Centric Financial Reporting
- ✓ Chart of Accounts / General Ledger
- ✓ Profit & Loss / Balance Sheet
- ✓ Bank and Operating Account Management
- ✓ Online Banking Integration
- ✓ Credit Card Management
- ✓ Expense Tracking
- ✓ Tax Reporting
- ✓ Trust Accounting with Three-Way Reconciliation
- ✓ Amortization Functions

# TrustBooks



## OVERVIEW

TrustBooks is dedicated to simplifying trust accounting for law firms. This cloud-based software ensures compliance with state bar guidelines through meticulous trust/IOLTA accounting and three-way reconciliation processes.

Its design is specifically aimed at making trust accounting intuitive for lawyers, without the need for extensive accounting knowledge.

## WHO TRUSTBOOKS IS GOOD FOR

This software is ideal for law firms that prioritize strict compliance with trust accounting regulations. It is especially useful for firms that find traditional accounting software too complex or inadequate for managing trust accounts accurately.

## PRODUCT HIGHLIGHTS

- TrustBooks is streamlined to handle trust accounting with built-in controls that prevent common errors like overdrawing a client’s balance.
- It offers automatic three-way trust reconciliations, ensuring continual compliance with regulatory requirements.
- The platform is designed to be user-friendly, aiming to alleviate the complexity typically associated with financial software.

## TRUSTBOOKS IN THE CLOUD

Being cloud-based, TrustBooks provides flexibility and real-time access to financial data, crucial for timely and accurate trust account management.

## PRICING

- Tier One: \$49 / Month
- Tier Two: \$69 / Month
- Tier Three: \$199 / Month

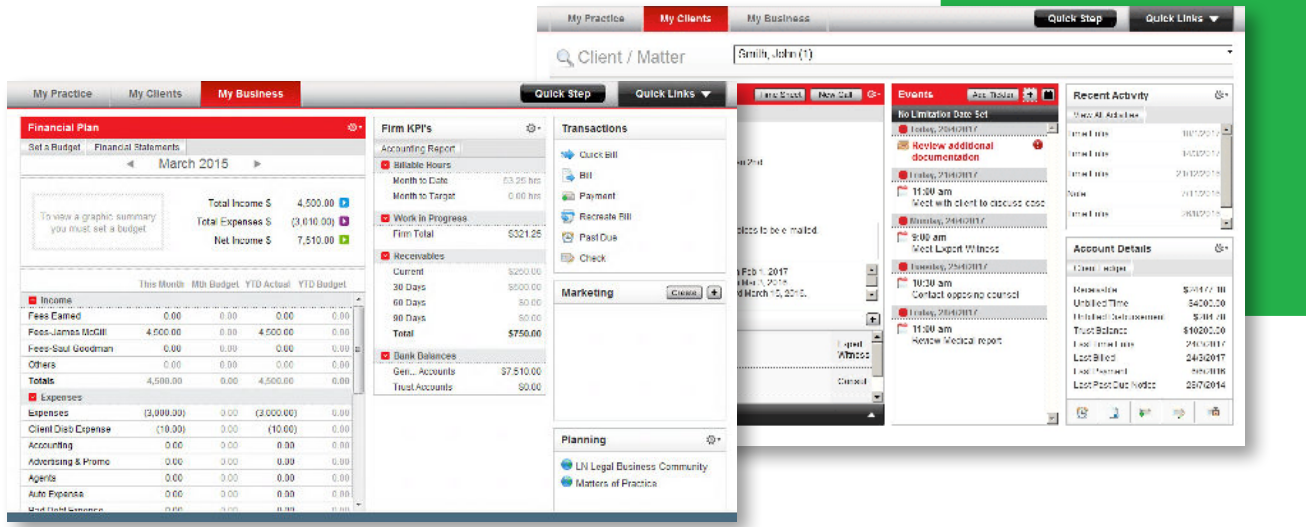
## FREE TRIAL

TrustBooks offers a free trial. [Try TrustBooks for free here.](#)

## Full Feature List

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>❌ General/Business Accounting</li> <li>✅ Trust/IOLTA Accounting</li> <li>✅ Cash Basis &amp; Accrual Accounting</li> <li>❌ Multiple Billing Types</li> <li>✅ Law Firm-Centric Financial Reporting</li> <li>❌ Chart of Accounts / General Ledger</li> <li>❌ Profit &amp; Loss / Balance Sheet</li> </ul> | <ul style="list-style-type: none"> <li>✅ Bank and Operating Account Management</li> <li>✅ Online Banking Integration</li> <li>❌ Credit Card Management</li> <li>❌ Expense Tracking</li> <li>❌ Tax Reporting</li> <li>✅ Trust Accounting with Three-Way Reconciliation</li> <li>❌ Amortization Functions</li> </ul> |
|---|--|

# PCLaw



## OVERVIEW

PCLaw from LexisNexis is a well-established, desktop/server-based software designed for small to midsize law firms.

It integrates practice management, billing, and comprehensive accounting functionalities into one robust platform, making it an all-in-one solution for legal professionals.

## Full Feature List

- ✔ General/Business Accounting
- ✔ Trust/IOLTA Accounting
- ✔ Cash Basis & Accrual Accounting
- ✔ Multiple Billing Types
- ✔ Law Firm-Centric Financial Reporting
- ✔ Chart of Accounts / General Ledger
- ✔ Profit & Loss / Balance Sheet
- ✔ Bank and Operating Account Management
- ✖ Online Banking Integration
- ✖ Credit Card Management
- ✔ Expense Tracking
- ✔ Tax Reporting
- ✔ Trust Accounting with Three-Way Reconciliation
- ✖ Amortization Functions

## WHO PCLAW IS GOOD FOR

PCLaw is ideal for law firms looking for a unified solution to handle their case management, billing, and accounting needs in one place. It's particularly great for firms that want to avoid using multiple software systems and those that require strong trust accounting and financial reporting capabilities.

## PRODUCT HIGHLIGHTS

- PCLaw combines client/matter management, timekeeping, billing, and accounting in a single application.
- It's known for its user-friendly interface that simplifies operations without the need for a consultant during setup.
- The software provides flexible billing options, including fixed-fee, split billing, and extensive financial reporting features.
- PCLaw can be used stand-alone, or in conjunction with Time Matters - LexisNexis' practice management/document management application.

## PRICING

PCLaw does not publish pricing publicly. Contact PCLaw directly or a partner, such as Uptime Legal, for pricing information.

## PCLAW IN THE CLOUD

While traditionally server-based, PCLaw can also be hosted in a managed Private Cloud environment such as Uptime Practice, which combines the robustness of traditional software with the flexibility and security of cloud services. This allows firms to manage their practice remotely, secure their data, and eliminate typical server and IT management headaches.

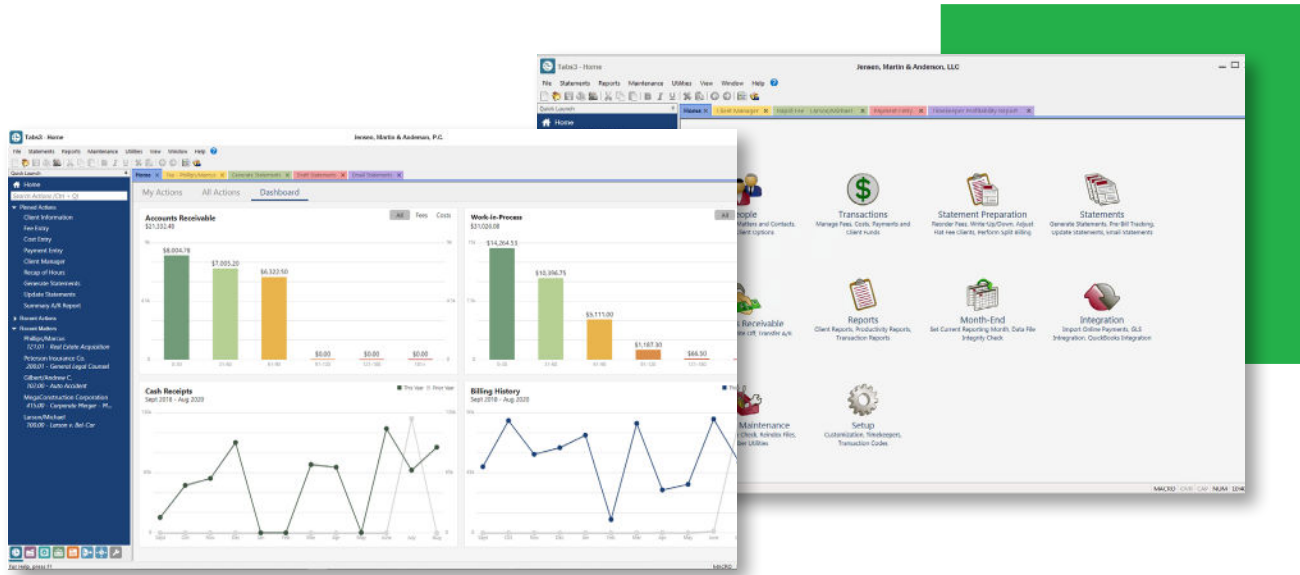
Learn more about [PCLaw in the Cloud](#).

## ADDITIONAL RESOURCES

- Article: [How to Use PCLaw In the Cloud](#)
- Review: [Full PCLaw Review for Law Firms](#)



# Tabs3



## OVERVIEW

Tabs3, server-based software developed by Software Technology, Inc., is a comprehensive legal billing and accounting software tailored for law firms.

## WHO TABS3 IS GOOD FOR

Tabs3 is well-suited for law firms looking for a robust and integrated solution to handle detailed billing, sophisticated trust accounting, and comprehensive business accounting.

## PRODUCT HIGHLIGHTS

- Tabs3 offers integrated billing, business accounting, and trust accounting, eliminating the need for multiple software systems.
- The software is noted for its ease of use, facilitating rapid setup and adoption without the necessity for extensive training or consulting.
- Tabs3 features flexible billing capabilities, including time, expense tracking, and advanced financial reporting, to meet diverse law firm billing requirements.

## PRICING

Tabs3 does not list specific pricing details publicly; interested law firms need to contact the vendor directly or use the provided price calculator on their website to get a custom quote based on their specific needs and the number of users.

For further details on Tabs3 features, pricing, and deployment options, you can visit their official website: [Tabs3 Official Site](#).

## TABS3 IN THE CLOUD

Although primarily server-based, Tabs3 can also be hosted in a private cloud, offering the benefits of cloud computing such as remote accessibility, enhanced security, and reduced IT overhead. This setup allows law firms to manage their practices from anywhere while ensuring that their data is secure and easily accessible.

Learn more about [Tabs3 in the Cloud](#).

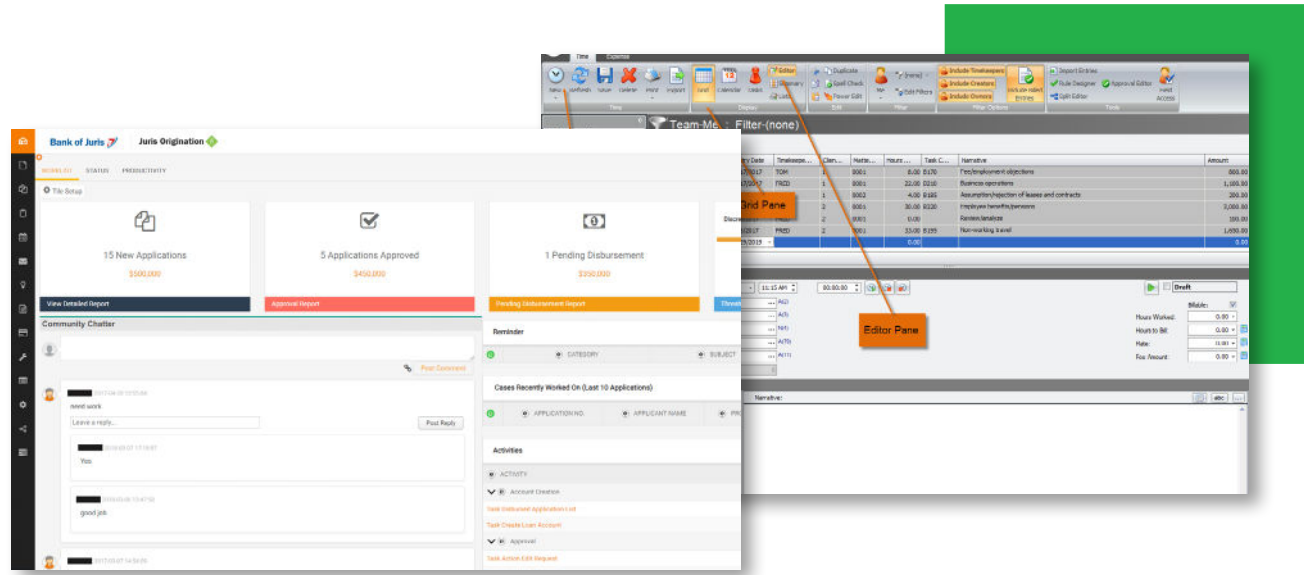
## ADDITIONAL RESOURCES

- Article: [How to Use Tabs3 in the Cloud](#)  
 Review: [Full Tabs3 Review for Law Firms](#)

## Full Feature List

- ✓ General/Business Accounting
- ✓ Trust/IOLTA Accounting
- ✓ Cash Basis & Accrual Accounting
- ✓ Multiple Billing Types
- ✓ Law Firm-Centric Financial Reporting
- ✓ Chart of Accounts / General Ledger
- ✓ Profit & Loss / Balance Sheet
- ✓ Bank and Operating Account Management
- ✓ Online Banking Integration
- ✓ Credit Card Management
- ✓ Expense Tracking
- ✓ Tax Reporting
- ✓ Trust Accounting with Three-Way Reconciliation
- ✓ Amortization Functions

# Juris



## OVERVIEW

Juris, offered by LexisNexis, is a server-based legal billing and accounting platform designed primarily for mid to large-sized law firms. It provides comprehensive accounting capabilities along with detailed billing for various billing models.

## WHO JURIS IS GOOD FOR

Juris is ideal for law firms that require robust, full-fledged accounting software capable of managing complex financial transactions and reporting. It's particularly suited for firms with 10 or more timekeepers who need a reliable and scalable accounting solution.

## PRODUCT HIGHLIGHTS

- Juris offers rich accounting features that cover all aspects of business and trust accounting.
- The software includes robust billing systems that accommodate a variety of billing arrangements and are flexible enough to meet the diverse needs of law firms.
- Juris integrates seamlessly with Time Matters for comprehensive practice management.

## PRICING

Juris does not publish pricing publicly. Contact Juris directly or a partner, such as Uptime Legal, for pricing information.

## JURIS IN THE CLOUD

While primarily a server-based application, Juris can also be hosted in a managed private cloud environment, offering law firms the benefits of cloud computing such as scalability, remote accessibility, and enhanced security.

Learn more about [Juris in the Cloud](#).

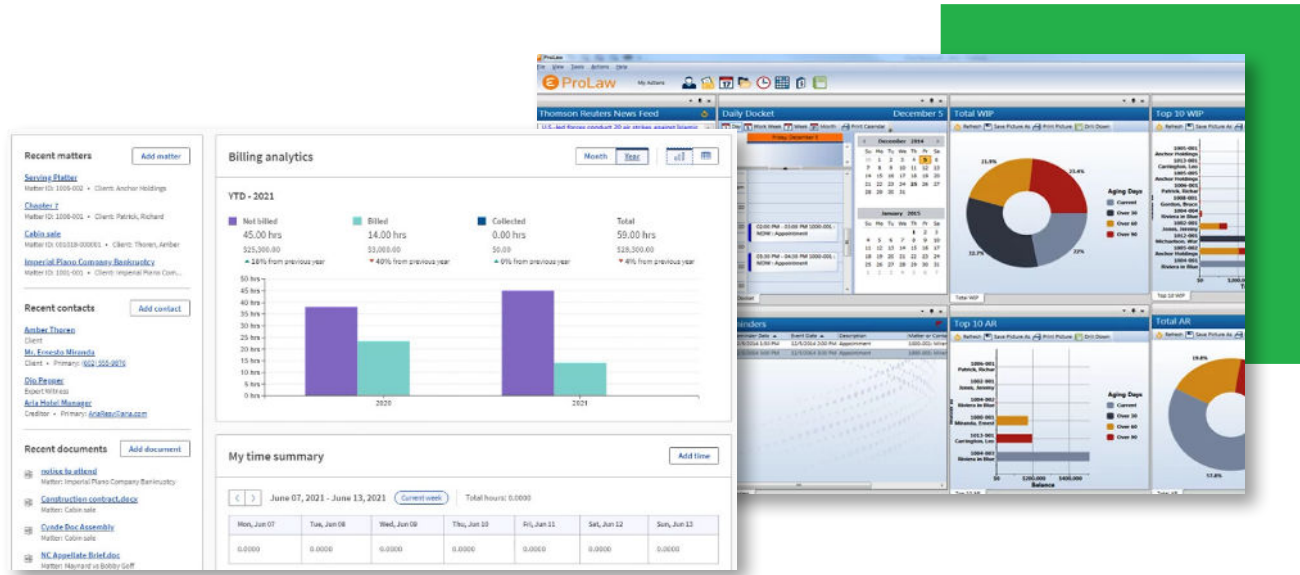
## ADDITIONAL RESOURCES

- Article: [How to Use Juris in the Cloud](#)  
 Review: [Full Juris Review for Law Firms](#)

## Full Feature List

- ✓ General/Business Accounting
- ✓ Trust/IOLTA Accounting
- ✓ Cash Basis & Accrual Accounting
- ✓ Multiple Billing Types
- ✓ Law Firm-Centric Financial Reporting
- ✓ Chart of Accounts / General Ledger
- ✓ Profit & Loss / Balance Sheet
- ✓ Bank and Operating Account Management
- ✓ Online Banking Integration
- ✓ Credit Card Management
- ✓ Expense Tracking
- ✓ Tax Reporting
- ✓ Trust Accounting with Three-Way Reconciliation
- ✓ Amortization Functions

# ProLaw



## OVERVIEW

ProLaw is comprehensive, server-based software that combines robust accounting functionalities with practice management and document management systems tailored for law firms.

It stands out for its deep integration of financial management tools within a broader practice management framework, making it a compelling choice for law firms that require an all-in-one solution.

## Full Feature List

- ✔ General/Business Accounting
- ✔ Trust/IOLTA Accounting
- ✔ Cash Basis & Accrual Accounting
- ✔ Multiple Billing Types
- ✔ Law Firm-Centric Financial Reporting
- ✔ Chart of Accounts / General Ledger
- ✔ Profit & Loss / Balance Sheet
- ✔ Bank and Operating Account Management
- ✔ Online Banking Integration
- ✔ Credit Card Management
- ✔ Expense Tracking
- ✔ Tax Reporting
- ✔ Trust Accounting with Three-Way Reconciliation
- ✔ Amortization Functions

## WHO PROLAW IS GOOD FOR

Ideal for mid-sized to large law firms, ProLaw is particularly effective for organizations that require sophisticated accounting capabilities integrated with case and document management. It is well-suited for firms that manage a significant volume of transactions and need comprehensive financial tracking and reporting.

## PRODUCT HIGHLIGHTS

- **Integrated Financial Management:** ProLaw includes full-fledged accounting features such as general ledger, accounts payable, accounts receivable, and financial reporting.
- **Trust Accounting:** Provides robust trust/IOLTA accounting functionalities necessary for compliance with legal financial handling regulations.
- **Flexible Billing Options:** Supports various billing arrangements, accommodating diverse client billing requirements including time-based, fixed fee, and contingency billing.
- **Advanced Financial Reporting:** Offers detailed financial analysis and reporting tools that help firms track profitability, manage budgets, and ensure financial compliance.

## PRICING

ProLaw's pricing structure is tailored to meet the needs of various firm sizes and can vary based on the specific modules and functionalities implemented. For detailed pricing information, potential users should contact Thomson Reuters Elite directly.

## PROLAW IN THE CLOUD

ProLaw is server-based, which means it can be run on your firm's on-premise servers, or within a full-managed Private Cloud. A Private Cloud, such as Uptime Practice, will host your ProLaw software, documents, emails, and other applications in a secure cloud workspace.

Learn more about [ProLaw in the Cloud](#).

## ADDITIONAL RESOURCES

- Article: [How to Use ProLaw in the Cloud](#)
- Review: [Full ProLaw Review for Law Firms](#)

## Legal Accounting Software Comparison Table

✔ Yes    ✖ No

	General/ Business Accounting	Trust/IOLTA Accounting	Cash Basis & Accrual Accounting	Multiple Billing Types	Law Firm-Centric Financial Reporting	Chart of Accounts / General Ledger	Profit & Loss / Balance Sheet	Bank and Operating Account Management	Online Banking Integration	Credit Card Management	Expense Tracking	Tax Reporting	Trust Accounting with Three-Way Reconciliation	Amortization Functions
<b>Clio Accounting</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
<b>QuickBooks</b>	✔	✖	✔	✔	✖	✔	✔	✔	✔	✔	✔	✔	✖	✖
<b>Centerbase</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
<b>TrustBooks</b>	✖	✔	✔	✖	✔	✖	✖	✔	✔	✖	✖	✖	✔	✖
<b>PCLaw</b>	✔	✔	✔	✔	✔	✔	✔	✔	✖	✖	✔	✔	✔	✖
<b>Juris</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
<b>ProLaw</b>	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔

# Notes

# Appendix A:

# Legal Software Glossary

## 1. **Basic Cloud Storage**

A cloud-based service offering simple file storage and access, typically lacking advanced features like encryption, versioning, or matter-centric organization that legal document management systems require for security and effectiveness.

## 2. **Client Portal**

A secure, online platform where law firms' clients can access case information, documents, billing, and communicate with their attorneys. Client portals improve client satisfaction by offering 24/7 access to important case information.

## 3. **Cloud-Based**

Refers to software, services, or infrastructure hosted and accessed over the internet, rather than on local servers. For law firms, cloud-based document management provides flexibility, remote access, and improved collaboration.

## 4. **Cloud-Hosting**

A service where law firm data, applications, or websites are stored and managed on cloud-based servers rather than on-premises hardware. Cloud-hosting offers scalability, flexibility, and reduced maintenance compared to traditional hosting methods.

## 5. **Content Marketing**

A marketing strategy focused on creating and sharing valuable content to attract and engage an audience. Law firms use content marketing (such as blogs, case studies, or white papers) to demonstrate expertise and build trust with potential clients.

## 6. **CRM (Customer Relationship Management)**

A system that helps law firms manage interactions with clients and potential clients. CRM software tracks communications, appointments, and follow-ups, improving client relationships and ensuring no opportunities are missed.

## 7. **Cybersecurity**

The practice of protecting systems, networks, and data from digital attacks. Law firms must implement strong cybersecurity measures, such as firewalls, encryption, and multi-factor authentication, to safeguard client information.

**8. Data Encryption**

The process of encoding information to protect it from unauthorized access. Law firms must encrypt both in-transit and at-rest data to comply with privacy regulations and safeguard sensitive client information.

**9. Disaster Recovery and Business Continuity**

A strategy designed to help law firms recover from unexpected events such as cyberattacks or natural disasters, ensuring that critical data is backed up and accessible, allowing the firm to continue operations with minimal disruption.

**10. Document AI**

Artificial intelligence tools designed to assist with organization, categorization, and analysis of legal documents. Document AI helps law firms quickly locate documents, extract key information, and improve productivity.

**11. Document IDs**

Unique identifiers assigned to documents within a DMS, allowing for precise tracking, retrieval, and referencing. Document IDs ensure consistency in document organization and are essential for compliance and audit purposes in law firms.

**12. Document Management Software**

Document management is a kind of software that stores, organizes and provides tools to help your law firm manage its documents. Beyond the basic storage that you'll find with an on-premise file server, or basic cloud storage services like Dropbox, document management software provides capabilities including full-text search, version management, OCR, document tagging and more.

**13. Email Management**

The process of organizing, storing, and retrieving emails efficiently, often through integration with a DMS. In law firms, email management systems help store client communications in a secure, compliant, and easily accessible way.

**14. Geographic Redundancy**

The practice of storing copies of data across multiple geographic locations to protect against data loss from natural disasters or other localized failures. Geographic redundancy ensures law firms' data remains accessible and secure, even during catastrophic events.

**15. Integrated OCR**

Optical Character Recognition (OCR) technology integrated into a DMS, which enables law firms to convert scanned documents and images into searchable, editable text. OCR is essential for making legal documents more accessible and efficient to manage.

**16. IT Support**

Assistance provided to law firms to address technical issues, including troubleshooting, hardware repairs, and software installations. IT support helps law firms minimize downtime and maintain business continuity.

**17. Legacy DMS**

A Document Management System (DMS) built on outdated or older technologies, often lacking modern features such as cloud integration, mobile access, and AI-based search functionalities. Legacy systems are costly to maintain and may pose security risks for law firms due to limited updates and support.

**18. Link Building**

The process of acquiring hyperlinks from other websites to improve the authority and search ranking of a law firm's website. High-quality links from trusted sources help law firms rank higher in search engines.

**19. Local SEO**

A subset of SEO that focuses on optimizing a law firm's online presence for local search results, helping firms attract clients in their geographic area. Local SEO involves strategies like optimizing Google Business profiles and building local citations.

**20. Local Service Ads**

Paid ads that appear at the top of Google search results, specifically targeting local service providers. Law firms can use Local Service Ads to quickly gain visibility and generate leads from prospective clients searching for legal services.

**21. Managed IT Services**

Outsourced IT services that provide law firms with ongoing support, maintenance, and management of their IT infrastructure. Managed IT services ensure law firms' systems remain secure, up-to-date, and functional without needing in-house IT staff.

**22. Matter Management**

A system or software designed to help law firms organize, track, and manage legal matters, including case files, deadlines, and billing. Matter management often integrates with document management systems to streamline workflows.

**23. On-Premise File Servers**

Physical servers located within a law firm's office used to store, manage, and back up documents. These require regular maintenance, IT staff, and can be less secure and scalable compared to cloud solutions.

**24. PPC (Pay-Per-Click)**

A digital advertising model where law firms pay each time a user clicks on their ad. PPC ads can appear on search engines, social media, or other websites, allowing firms to target potential clients based on specific keywords or demographics.

**25. Practice Management**

Software that helps law firms manage their day-to-day operations, including client intake, case management, billing, calendaring, and more. Practice management systems may include document management and email integration.

**26. Private Cloud**

A cloud computing environment dedicated solely to one organization, often providing greater control, security, and customization. Law firms may use private clouds to store sensitive data while meeting compliance and security requirements.

**27. SEO (Search Engine Optimization)**

The practice of optimizing a website to improve its ranking on search engines like Google. Law firms use SEO to increase visibility, attract potential clients, and establish credibility online.

**28. Server-Based**

Refers to software or systems hosted on physical servers within the law firm's premises. While server-based setups offer direct control, they often come with higher infrastructure costs and require significant in-house IT support.

**29. Two-Factor Authentication (2FA)**

An added layer of security requiring two forms of identification, typically something you know (like a password) and something you have (like a phone). Law firms use 2FA to prevent unauthorized access to their systems and sensitive data.

**30. Version Management**

The ability to track and manage multiple versions of a document within a DMS, ensuring that law firms can easily revert to previous versions and maintain an audit trail of changes for compliance and collaboration purposes.

**31. Virtual Desktop**

A cloud-hosted desktop environment that allows law firm employees to access their office software and files from any device with an internet connection. Virtual desktops enable remote work while maintaining security and access controls.

**32. Virtual Law Firm**

A law firm that operates without a traditional physical office, utilizing cloud-based tools, virtual desktops, and remote communication platforms. Virtual law firms benefit from reduced overhead and greater flexibility for both lawyers and clients.

**33. VoIP (Voice over Internet Protocol)**

A technology that allows voice calls to be made using the internet rather than traditional phone lines. Law firms use VoIP for cost-effective, flexible communication, enabling remote work and integration with client management tools.



# Appendix B:

# Moving Your Software to a Private Cloud

Online software is increasingly becoming the go-to solution for many solo and small legal firms.

Yet, a significant number of these firms remain attached to their established, premise-based legal software such as PCLaw, Time Matters, ProLaw, Tabs3 or Worldox. They also desire the flexibility and security that a cloud environment offers.

In the same vein, medium and large law firms are attracted by the benefits of cloud technology but require the comprehensive and sophisticated functionality of premise-based software.

A **private cloud** could be the perfect solution for such firms, allowing them to transition their traditional server/desktop-based software, eliminate the need for onsite servers, empower their team to work remotely, and ensure data security.

### **Server-Based Software in The Legal Industry**

The sophisticated, premise-based practice management tools necessitate a server, which hosts the database and the backend for each application. Traditionally, the use of these applications implied that law firms had to purchase a server and engage an onsite IT consultant for server setup and management.

The advent of private clouds, however, has changed this scenario. These applications, still popular among many law firms, require a server—where a private cloud effectively serves that role. The private cloud is akin to a server your firm might have in its storage room, but it is provided, managed, and supported by a Cloud Service Provider (CSP).

For law firms, a Private Cloud is the ideal solution, providing a server that can host server-based software in the cloud. The end-users, i.e., your firm's employees, can access this server from anywhere through a virtual desktop.

### **The Virtual Desktop**

Often referred to as Desktop-as-a-Service, or DaaS, a cloud service provider replaces your law firm's server and IT infrastructure with a managed Virtual Desktop. This Virtual Desktop is used by you and your staff to access your applications and documents.

From the user's standpoint, they can log in from any device (PC, Mac, iPad, etc.). Within the Virtual Desktop, they can access Microsoft Word, Excel, Outlook email, the firm's practice management, and billing software. Since all applications, documents, and emails are hosted by a Cloud Service Provider, users can connect from any device, anywhere globally.

Beyond the obvious advantage of working remotely, the significant benefit of a Virtual Desktop and a Private Cloud is that the service provider takes care of system maintenance and software updates, leaving you and your law firm to concentrate on your core competencies and leave IT concerns to the service provider.

## What Software Can Be Deployed in a Private Cloud?

Almost any Windows-based software can be hosted on a Private Cloud. This is particularly beneficial for law firms using Microsoft Office, Adobe Acrobat, WordPerfect, along with a wide array of practice management, calendaring, billing, accounting, and document management applications.

Software frequently hosted in a Private Cloud for Law Firms includes:

- PCLaw
- Time Matters
- Tabs3
- ProLaw
- Worldox
- Needles
- QuickBooks
- Timeslips
- TrialWorks
- iManage

## Should My Law Firm Adopt a Private Cloud?

Knowing what a Private Cloud is and what it does, the question remains – should your firm transition to a Private Cloud?

### Consider these questions:

- Do I rely on traditional Practice Management applications?
- Do I use a variety of devices, including Windows PC's and Apple devices?
- Do I require access to all my practice tools (software, documents, and email) from anywhere?
- Am I weary of managing servers and IT? If one or more responses are 'yes', it's likely that your firm should transition.

## How Do I Find the Right Cloud Provider?

Numerous providers today offer Private Cloud solutions tailored to various industries and applications, though their expertise in legal-specific applications can be limited.

We recommend choosing a Cloud Service Provider who is familiar with and can support your firm's practice management software, and who understands the workflow and culture of law firms.

To guide you in this process, we suggest consulting our [Law Firm Cloud Due Diligence Checklist](#).

# Appendix C:

# AI and Lawyers

There has been a lot of buzz around AI, and the relationship between AI and lawyers, in recent times. The current commentary ranges from practical discussions to esoteric and philosophical; the business of law has certainly been part of the discussion.

Put simply, there's a lot of information out there about AI, the practice of law, applications, risks, benefits and the future. Everyone wants to know where we go from here, so here is some information to digest.

## Why now?

AI has been a hot topic for years, but recently, the progression and application of AI has become much more tangible.

This leaves numerous industries, law firms included, to wonder how to utilize the newest technology in a meaningful way. Aside from what law firms can do at their own discretion to benefit from AI, companies, [such as LexWorkplace](#), have integrated AI within their software to further improve efficiency and success through using AI to complete legal tasks such as legal research, document drafting, contract review, and even passing the Uniform Bar Exam.

## Overview of Artificial Intelligence

Let's cover some terms and principles of AI.

### Machine Learning

Machine learning, a subset of artificial intelligence, allows computers to learn and make decisions without specific programming. It involves feeding vast quantities of data (like images or text) to a computer system, which then identifies patterns and makes predictions based on the data.

### Generative AI

Generative AI are tools that create content. The most notable of these are text-generation tools such as ChatGPT, and graphic/artistic generative tools like Midjourney.

### Large Language Models (LLMs)

Advanced AI systems like GPT-3 and GPT-4, known as Large Language Models (LLMs), generate human-like text by learning from a broad range of text data sources. They are increasingly useful for legal professionals, aiding in tasks like legal research, document drafting, and contract review. However, as these models can occasionally misinterpret data, they should be used as auxiliary resources worth fact-checking rather than absolute authorities.

### ANI and AGI

Artificial Narrow Intelligence (ANI) is a form of AI that excels at one specific task, such as credit card fraud detection or curating your YouTube feed, powered by machine learning. On the other hand, Artificial General Intelligence (AGI) is the concept often shown in sci-fi movies that show a superintelligence that comprehends a wide array of subjects. AGI hasn't been realized yet, but some believe it's nearby. Generative AI tools like GPT-4 fall somewhere between ANI and AGI.

## Practical Applications

Let's acknowledge that AI is not just futuristic, dramatic uses of technology. In fact, you could easily incorporate AI into your workflow. Here are some tools that you may find useful.

### ChatGPT

ChatGPT, a leading Large Language Model by OpenAI, can be considered a versatile text generation tool or personal assistant. It's available for free and in a Premium edition with the latest GPT-4 model. Its wide applications include:

Its wide applications include:

- Answering General Questions
- Drafting And Editing Content
- Summarizing Information
- Brainstorming Ideas
- And more.

### Microsoft 365 Copilot

Copilot Microsoft 365 Copilot, a result of Microsoft's collaboration with OpenAI, integrates ChatGPT-like functionality into the Microsoft 365 suite. It assists in:

- Authoring Content in Word
- Drafting and Refining Emails in Outlook
- Composing Messages in Teams
- Analyzing Data in Excel

Touted as tools to amplify your productivity, these AI utilities can boost your output and provide a significant advantage to legal professionals who learn to leverage them effectively.

### Jasper

Jasper is a generative AI tool akin to ChatGPT, designed to assist in the creation of written content such as:

- Blogs
- Articles
- Marketing Copy
- Press Releases
- Sales Emails

While such tools can notably expedite the content production process, including legal drafting, they should serve as complementary aids rather than replacements for human expertise, particularly for legal document review and validation, which should remain under skilled lawyers' purview.

### AI and Lawyers – The Near Future

The legal tech industry is witnessing rapid innovation with AI and Large Language Model (LLM) integrations.

One instance is LexWorkplace's LLM integration, which allows law firms to utilize AI for document searching, summarization, and other time-saving applications.

As AI continues to evolve, it's expected to introduce more potent applications in the legal tech sector, revolutionizing the industry and service delivery.

### AI and Lawyers – The Further Future

AI, particularly Large Language Models like ChatGPT, is poised to automate around 44% of legal work, mainly involving document analysis, drafting, and legal research, according to Goldman Sachs. Despite this, many, including myself, are optimistic.

Like how robotic automation boosted productivity in factories without entirely replacing humans, AI could enhance legal professionals' efficiency tenfold without removing the need for the human touch.

This could enable law firms to help more clients, reduce legal costs, and possibly improve access to justice.

## THE VERDICT:

In the future, it's important for every law firm to have an AI strategy, which begins with staying updated on AI advancements.

Lawyers should evaluate emerging tools to determine their potential value. Firms that adopt AI tools will not only surpass competitors but also significantly improve their client service and outcomes.

Don't worry—AI isn't here to replace your job, but rather it is here to make your job easier and to help you find better success in serving your community.

For more information, read our article on [AI and Lawyers](#)

# Appendix D: Additional Resources

Best Legal Document Management Software

Best Cloud Storage for Law Firms

Virtual Law Firm

Best Legal Accounting Software

Managed IT Services for Law Firms

Cybersecurity for Law Firms

Private Cloud 101 for Law Firms

Best Law Practice Management Software

SEO for Lawyers

Local SEO for Lawyers

Law Firm Marketing Strategy

PPC for Lawyers



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