2025

LEGAL SOFTWARE REPORT

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Introduction
to the 2025 Legal Software Report

Choosing the right software for your law firm requires a careful balance of strategy, foresight, and clarity.

For some firms, the question is whether to double down on existing systems or embrace new tools reshaping the industry. For others, it's how to adapt to accelerating changes: AI-powered innovations, stricter compliance requirements, and rising client expectations for security and accessibility.

The sheer volume of software options can be overwhelming—but you don't need to navigate it alone. Resources like this report can save valuable time, helping you cut through the noise and focus on what matters: aligning technology with your firm's goals, enhancing daily workflows, and positioning your practice for long-term success.

That's why I'm proud to introduce the **2025 Legal Software Report** from Uptime Legal Systems. This is the fifth edition of the report, and this year we've not only updated our rankings and vendor analysis, but also expanded our coverage to include the most important new trend in legal technology: integrated AI features.

Whether you're a longtime client or encountering us for the first time, we maintain an education-first philosophy. Our goal is to share insights, guidance, and clarity—so that when it comes time to choose, evaluate, or reimagine your firm's technology stack, you'll feel confident and informed.

In the following pages, you'll find a comprehensive look at the software categories that matter most to law firms: practice management, document management, CRM/intake, and accounting. For each solution, we provide an objective review of features, functionality, and user experience—highlighting both strengths and limitations.

As you review this year's Legal Software Report, we encourage you to take notes, compare options, and reach out if you'd like further guidance. Let us be your trusted partner in navigating the cutting-edge tools that will define the future of law firm technology.

Onward and Upward

Dennis Dimka
CEO | Uptime Legal Systems

New in 2025

Last year, we added the top Legal Accounting Software to our Legal Software Report.

This year, we've continued our updates across all core categories—Law Practice Management, Document Management, Intake & CRM, and Legal Accounting—highlighting how many established solutions have evolved with integrated AI enhancements. We also update our guidance on cloud hosting, cybersecurity, compliance readiness, and provide updated resources to support your firm's technology evaluation process.

For over a decade, Uptime Legal Systems has guided law firms through their tech decisions, helping them not just adapt—but thrive.

With that in mind, we invite you to explore our thoroughly refreshed **2025 Legal Software Report**.

PART 1

Law Practice Management & Accounting Software

How to Choose the Best Law Practice Management Software

Before diving into this year's top law practice management platforms, it's important to set the stage with some guidance for evaluating and selecting the right fit for your firm.

First, remember: there is no single "best" software for every law firm.

As you'll see in this report, different platforms emphasize different strengths. The key is to compare your firm's specific needs with the features and workflows each solution offers. That way, you can identify the platform that aligns best with how you work.

Every firm is unique. Your decision should reflect not only your practice areas and caseload, but also your firm's culture, operations, and how you plan to leverage technology to support them.

Software Capabilities & Requirements

So how do you match your firm's needs with what software provides?

We recommend beginning by creating a list of features and capabilities your firm requires. Categorize them into:

• **Must-Have** – Essential features your firm cannot operate without

• **Nice-to-Have** – Features that add value but are not critical

• **Irrelevant** – Features that don't apply to your practice

Because different stakeholders (attorneys, paralegals, support staff, accounting) often have very different needs, it's important to gather input across the firm. Doing so ensures broader adoption and minimizes resistance to change.

Tip: Use the checklist in this report to mark the features that matter most to you.

Uptime
LEGAL SYSTEMS

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

Before evaluating individual platforms, it's important to understand how practice management software can be deployed. Each approach carries its own character, and the right choice depends on your firm's size, priorities, and IT strategy.

On-Premise Software

On-premise software runs directly on your firm's servers and desktop computers, following the traditional deployment model.

- Often developed over decades, resulting in highly robust, feature-rich functionality.

- Capable of handling sophisticated workflows and managing complex practice operations.

- Requires the firm to purchase and maintain physical servers, which brings recurring costs, IT upkeep, and security responsibilities.

Web-Based Software

Web-based applications are natively cloud-based, running entirely in a web browser.

- Require no servers or local installation.

- Quick to set up and simple to maintain.

- Accessible from anywhere, which makes them especially appealing for remote or mobile work.

- Generally lighter in scope compared to traditional systems — well-suited for solo or small firms but sometimes limiting for midsize or larger firms with more complex needs.

Cloud-Hosted Software

Cloud-hosted software takes on-premise applications and deploys them in a secure private cloud rather than in your office.

- Delivers the advanced functionality of on-premise platforms.

- Adds the benefits of the cloud — including mobility, security, and reliability.

- Removes the burden of maintaining servers and in-house IT infrastructure.

For more details on hosting on-premise applications in a private cloud, see Appendix B of this report.

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.

Document Management
Advanced document management including full-text search, document tagging & profiling, and version management.

Email Management
The ability to save specific emails to a matter, or otherwise associate emails (sent or received) to a particular case.

Clio Manage
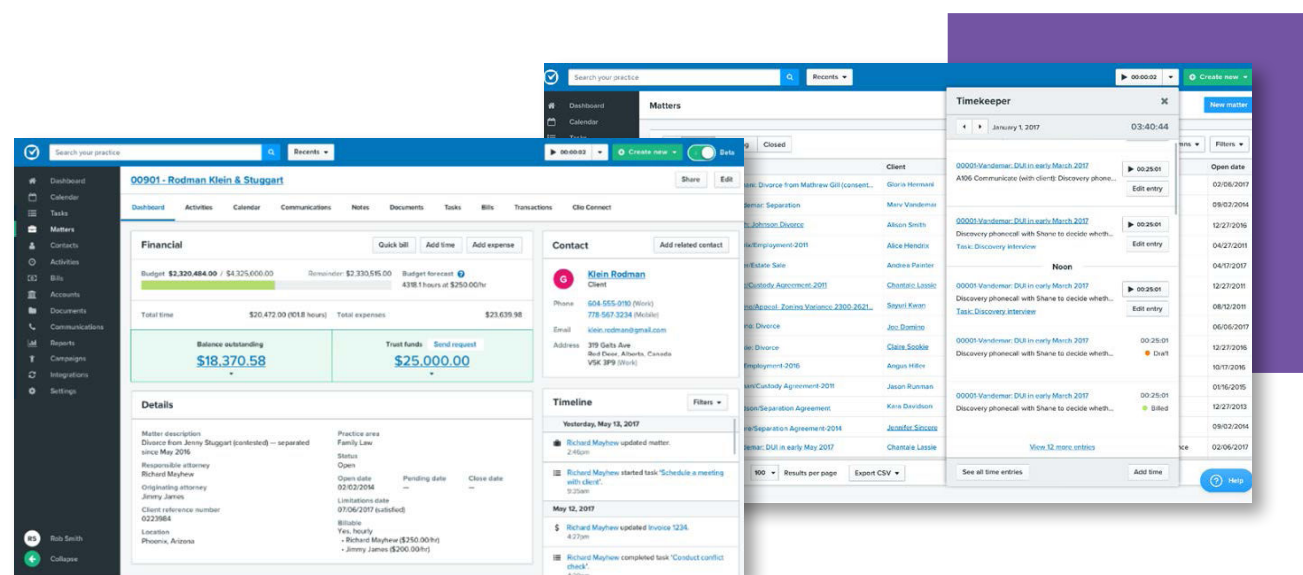
OVERVIEW

Clio was among the first cloud-based law practice management platforms and remains one of the most widely adopted systems in the market. It emphasizes a clean interface, reliable core matter and billing workflows, and an extensive ecosystem of integrations that connect Clio to tools firms already use.

Beyond everyday case work, firms leverage Clio to centralize calendaring, tasks, documents, and communications in one place. The result is a practical, approachable platform that scales from solos to larger teams while keeping administration lightweight.

DEPLOYMENT
Cloud-Based

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

✳ Available within a Private Cloud

WHO CLIO MANAGE IS GOOD FOR

Clio Manage is ideal for solo firms and small teams with up to ~10 timekeepers that want quick setup, intuitive day-to-day workflows, and broad integrations to tools they already use. It suits distributed teams that value low maintenance and a clean, modern interface.

With tiered plans and a large app directory, firms can start light and extend as needs grow—adding intake/CRM (Clio Grow) or financial add-ons without rebuilding their stack.

PRODUCT HIGHLIGHTS

- Clean, modern interface that's easy for teams to learn and adopt quickly.
- Deep integrations via the Clio App Directory (docs, e-signature, accounting, phone/SMS, court rules, and more).
- Pair with Clio Grow for intake/CRM to create an end-to-end client journey from lead to matter to invoice.
- Built-in workflow/automation options to reduce busywork and keep communications and documents attached to the right matters.
- Strong email/Google/Outlook integrations to file messages and attachments to matters in seconds.
- Robust marketplace integrations for docketing and other niche workflows.

AI CAPABILITY

Clio offers **Clio Duo**, a native AI assistant embedded in Clio Manage for case summaries, document analysis, smart recommendations, retrieval across matters, and "help me write" responses. (Available as an add-on to eligible plans.)

PRICING

- EasyStart: $49 / User / Month
- Essentials: $89 / User / Month
- Advanced: $119 / User / Month
- Complete: $149 / 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
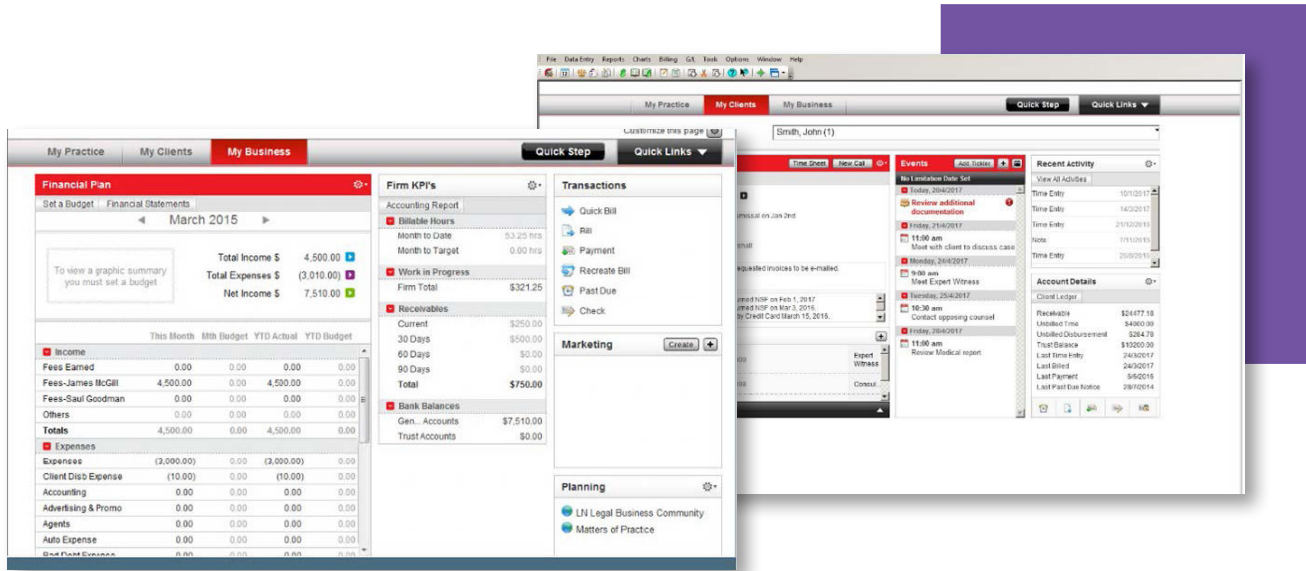
Ready to try Clio? Uptime Legal can help.

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

PCLaw brings together timekeeping, billing, business accounting, and trust/IOLTA management in a single application designed for law firms. Its strength lies in back-office financials—delivering detailed reporting, compliant trust controls, and flexible billing options without relying on a separate accounting system.

Front-office needs are covered with fundamental client and matter tracking to keep work organized. Many firms choose PCLaw specifically to simplify their tech stack and manage both practice finances and billing under one roof.

DEPLOYMENT

On-Premise or Private Cloud

WHO PCLAW IS GOOD FOR

PCLaw is ideal for small and midsize firms that want unified time, billing, business accounting, and trust/IOLTA controls in a single system without relying on separate bookkeeping software. It fits practices that prioritize compliant trust accounting and detailed financial reporting.

With flexible billing arrangements and robust reports, firms can tailor invoicing to real-world fee models and, if needed, pair PCLaw with Time Matters to deepen practice management.

PRODUCT HIGHLIGHTS

- All-in-one: practice/matter management plus billing, business accounting, and trust/IOLTA in a single system.
- Flexible billing options and reports designed specifically for law firms.
- Built-in compliant trust accounting with integrated accounting (no QuickBooks required).
- Can be used standalone or alongside Time Matters for enhanced practice/document management.
- Mature product with decades of legal-specific development and a large installed base.

AI CAPABILITY

No native AI module documented. Firms typically add AI via separate apps or integrations while keeping PCLaw as the financial and billing system of record.

PCLAW IN THE CLOUD

Server-based software can be hosted in a managed Private Cloud (e.g., **Uptime Practice**) to eliminate on-site server overhead while retaining PCLaw's functionality.

- 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

✳️ Available within a Private Cloud
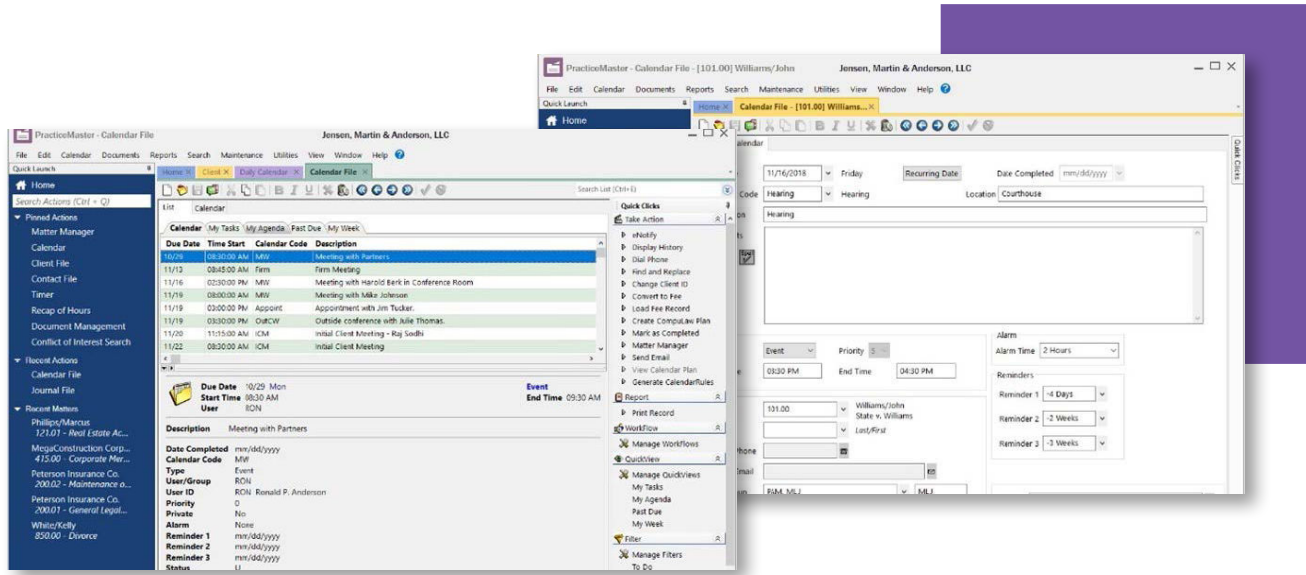
Tabs3

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.

DEPLOYMENT
On-Premise or Private Cloud

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

✴ Available within a Private Cloud

WHO TABS3 IS GOOD FOR
Tabs3 is ideal for firms that need comprehensive billing and accounting—including trust—alongside mature matter management through PracticeMaster. It aligns well with operations that emphasize back-office strength while keeping front-office work organized.

With modular components and a strong consultant network, firms can implement what they need today and run it on-premise or in a managed private cloud as the practice scales.

PRODUCT HIGHLIGHTS
- Comprehensive back-office suite: Tabs3 Billing, Trust, and Tabs3 Financials (GL/AP) tightly integrated with PracticeMaster for front-office matter management.
- Document management connectivity, including published integrations with leading DMS platforms.
- Broad ecosystem documentation and an established partner/consultant network for implementation and training.
- Designed for firms needing robust billing, accounting, and trust alongside strong matter and contact tracking.

AI CAPABILITY
No native AI offering. Tabs3/PracticeMaster users generally leverage third-party tools or DMS platforms for AI-related features if needed.

TABS3 IN THE CLOUD
No native AI offering. Tabs3/PracticeMaster users generally leverage third-party tools or DMS platforms for AI-related features if needed.

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**

ProLaw

OVERVIEW

ProLaw combines practice/case management, document management, and full accounting into one cohesive platform for law firms. Its unified approach helps firms manage front-office workflows, back-office billing and financials, and firm documents without bouncing between multiple products.

Deep ties to Microsoft Office and legal research tools streamline drafting, email filing, and research-to-matter workflows. For firms that want a comprehensive, all-in-one environment, ProLaw's breadth can consolidate operations and reduce system sprawl.

DEPLOYMENT

On-Premise or Private Cloud

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

✳️ Available within a Private Cloud

WHO PROLAW IS GOOD FOR

ProLaw is ideal for small to midsize firms that want one platform to handle practice/case management, document management, and full accounting. It's a fit for teams seeking fewer vendors and tighter front-office/back-office alignment.

With modular front-office and back-office options, firms can start with what's essential and expand into the full suite as workflows mature and financial complexity increases.

PRODUCT HIGHLIGHTS

- Single platform that combines practice/case management, document management, and full accounting.
- Modular approach: adopt front-office (PM/DMS), back-office (accounting), or both.
- Deep Microsoft Office and Outlook integrations for drafting and email filing; research connectivity to streamline workflows.
- Well-suited to firms that want an integrated tech stack deployed on-premise or in a Private Cloud.

AI CAPABILITY

No native AI assistant is surfaced in product materials; firms typically add AI via adjacent tools while keeping ProLaw as the unified system of record.

PROLAW IN THE CLOUD

A Private Cloud, such as **Uptime Practice**, will host your ProLaw software, documents, emails, and other applications in a secure cloud workspace.
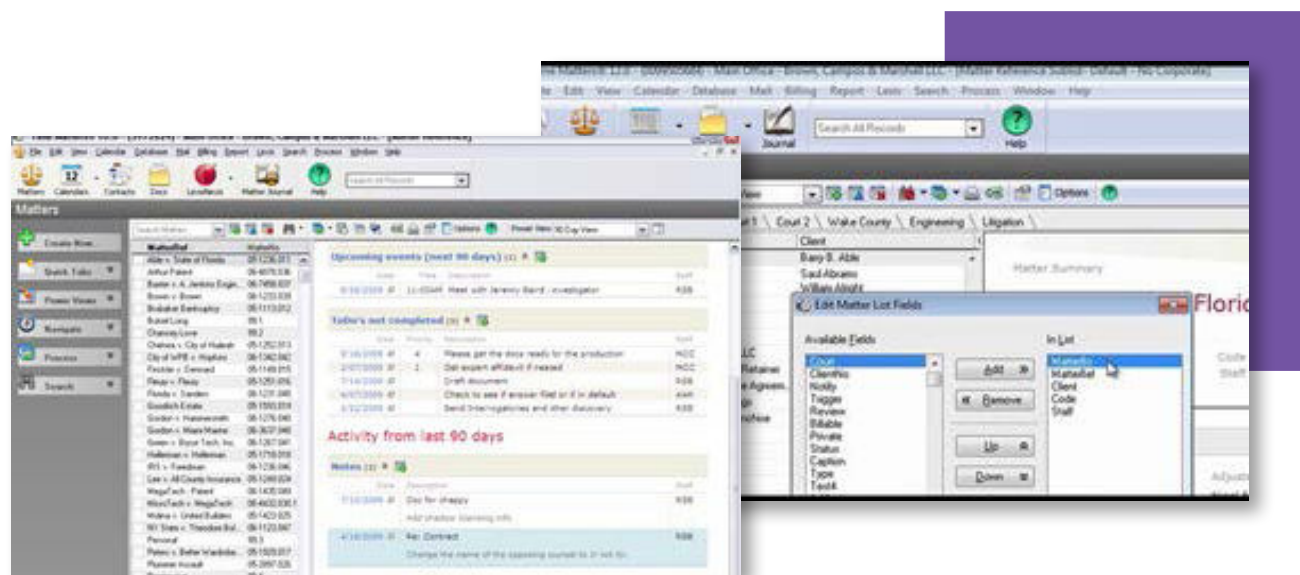- Eliminate Server & IT Headaches
- Keep Your Data Secure
- Manage Your Practice from Anywhere

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

OVERVIEW

Time Matters is a long-standing practice and document management system known for its depth and customization. Firms tailor matter screens, workflows, and reports to align with practice areas and internal processes, creating a tightly fitted workspace for day-to-day operations.

Core features cover contacts, calendaring, tasks, email, and document handling to keep case teams coordinated. When paired with dedicated accounting (e.g., PCLaw or Juris), it forms a complete, flexible solution for firms that value configurability.

DEPLOYMENT

On-Premise or Private Cloud

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

✳️ Available within a Private Cloud

WHO TIME MATTERS IS GOOD FOR

Time Matters is ideal for firms that need robust matter, calendar, task, email, and document capabilities with deep customization of screens, fields, workflows, and reports. It's well suited to practices that want software molded to their processes.

With close pairing to PCLaw or Juris for accounting, firms can assemble a complete solution while keeping Time Matters tailored to practice areas and case types.

PRODUCT HIGHLIGHTS

- Robust matter, calendar, and document management with extensive customization (workflows, fields, forms, reports).
- Integrates with PCLaw and Juris for billing/accounting; widely used in combined deployments.
- Tools for automation and time capture to help reclaim otherwise lost billable time.
- Mobile companion for on-the-go time entry and calendars.

AI CAPABILITY

No native AI module. Time Matters firms commonly incorporate AI via external drafting, research, or DMS tools while relying on TM for customized workflows.

TIME MATTERS IN THE 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
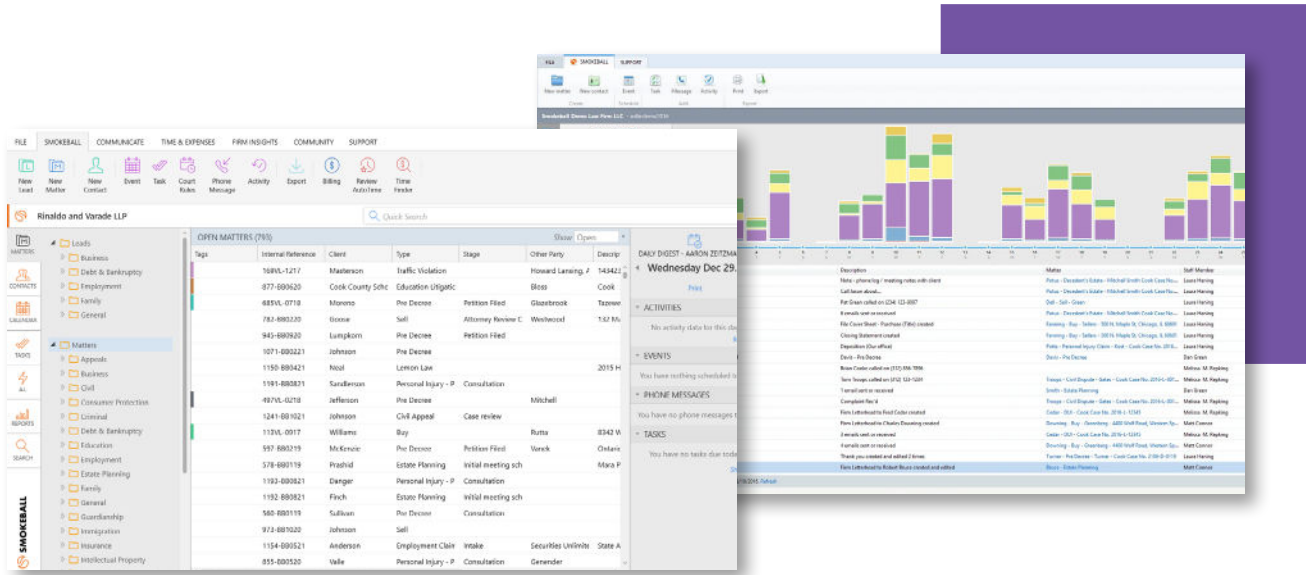- Manage Your Practice from Anywhere

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**

Smokeball

OVERVIEW

Smokeball is a cloud-based platform that blends practice management with powerful document automation and tight Microsoft/Outlook integration. It emphasizes productivity through automatic time capture, matter-centric email and document filing, and built-in billing and trust accounting.

A large forms library and templating tools help standardize documents and reduce drafting time. From intake to billing, Smokeball is designed to surface the work you're doing and translate it into organized matters and accurate invoices.

DEPLOYMENT
Cloud-Based

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

✳ 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

Robust matter-centric DMS with large form library and automation; save Word docs and Outlook emails to matters for centralized, searchable records.

PRODUCT HIGHLIGHTS

- Powerful document management and automated document assembly with large form libraries; deep Microsoft Word/Outlook ties.
- AutoTime automatic time tracking captures work in Word/Outlook without timers to reduce leakage.
- Intake/onboarding, matter management, billing, and trust accounting in one platform with multiple plan tiers.
- Two-way calendaring with Outlook and a unified communication timeline per matter.

AI CAPABILITY

Smokeball offers Smokeball AI features (e.g., drafting and summarization assistance) embedded across workflows; tiers may vary by feature availability.

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
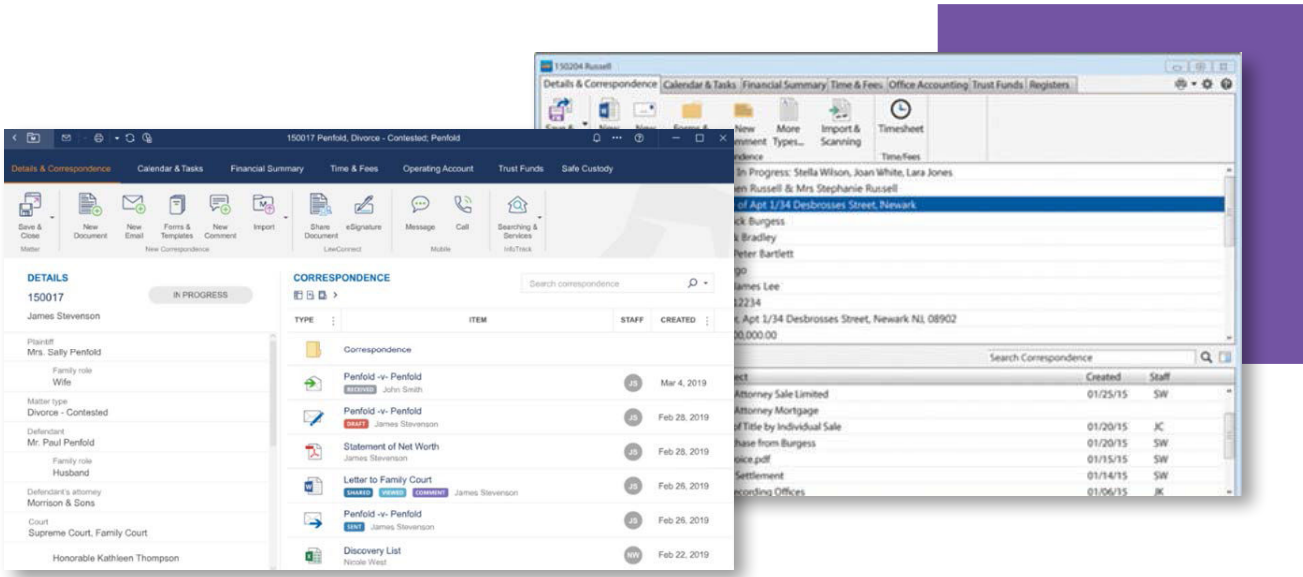
OVERVIEW

LEAP delivers a cloud-connected experience (desktop app plus cloud services) centered on matter management, time and billing, and a robust library of jurisdiction-specific forms. Its emphasis on document assembly helps firms generate, populate, and store documents quickly as part of everyday matter workflows.

The platform balances convenience and power—cloud access with the responsiveness of a desktop application. For form-heavy practices, LEAP's content and automation can materially speed up routine work.

DEPLOYMENT

Hybrid (Cloud w/ Desktop App)

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

✳️ Available within a Private Cloud

WHO LEAP IS GOOD FOR

LEAP is ideal for firms that want cloud convenience with a robust desktop experience and heavy use of automated forms. It fits practices that depend on jurisdiction-specific content and frequent document generation.

With its extensive forms library and document assembly, firms can standardize output and adopt additional tools and services as teams grow and matter volume increases.

DOCUMENT AND EMAIL MANAGEMENT

Integrated cloud storage and lightweight DMS; firms with very large historical data may still supplement with a dedicated DMS.

PRODUCT HIGHLIGHTS

- Cloud-centric platform with a rich library of automated state and federal forms and matter types; strong for document creation at scale.
- Hybrid usage pattern (cloud plus desktop app) for responsiveness and deep Office integration.
- Built-in legal accounting (including trust/IOLTA), time, billing, and client/matter management.
- Mature mobile app ecosystem supporting work away from the office.

AI CAPABILITY

LEAP markets AI-enhanced drafting and productivity features within its platform; firms can acknowledge these capabilities while focusing on LEAP's core strength in forms and automation.

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
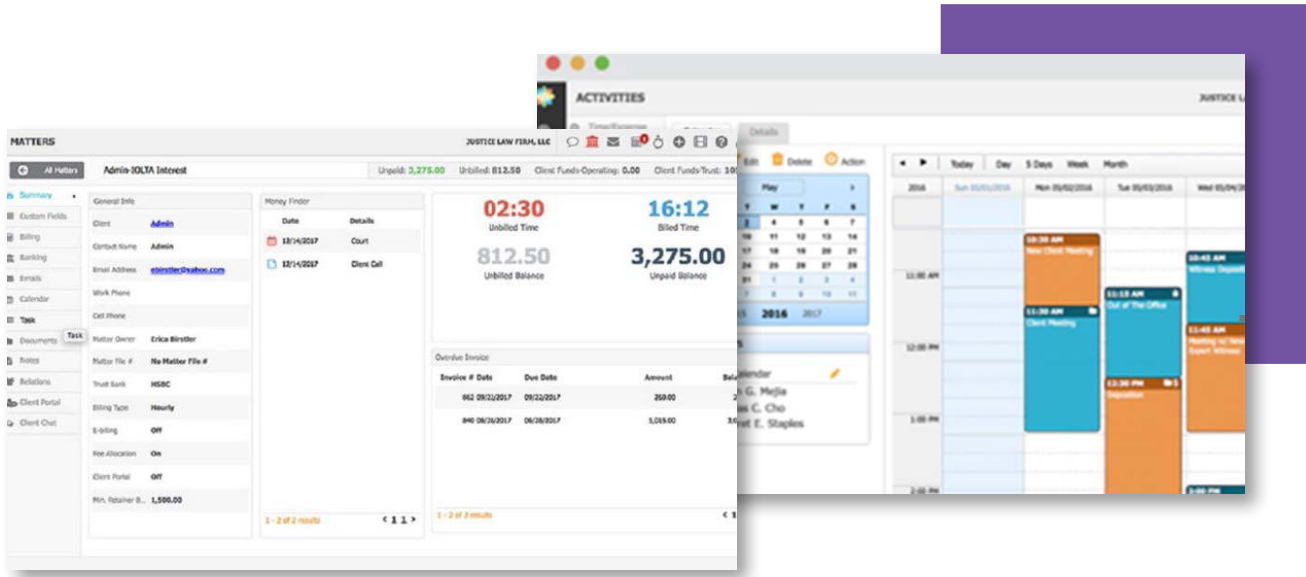
OVERVIEW

CosmoLex provides practice management, billing, and built-in business and trust accounting in one cloud application. By combining general ledger and trust/IOLTA with matter management, it removes the need for a separate bookkeeping system for many firms.

Day-to-day operations—time capture, invoicing, payments, and financial reporting— flow through a single platform. Firms choose CosmoLex to simplify operations, tighten financial controls, and keep practice data and accounting aligned.

DEPLOYMENT

Cloud-Based

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

✳️ Available within a Private Cloud

WHO COSMOLEX IS GOOD FOR

CosmoLex is ideal for firms that want practice management plus built-in business and trust accounting to avoid juggling multiple systems. It suits practices that value unified time, billing, and financials under one login.

With straightforward web deployment and native financial controls, firms can simplify operations from time capture through invoicing, reconciliation, and reporting as they expand.

DOCUMENT AND EMAIL MANAGEMENT

Includes cloud storage and fundamental DMS; some firms supplement with external DMS if needed.

PRODUCT HIGHLIGHTS

- All-in-one cloud LPM with full business and trust accounting—no separate QuickBooks required.
- Financial-first matter views (balances, revenue) and built-in trust/IOLTA compliance tooling.
- Timekeeping, billing, and reporting designed to centralize financial operations and reduce app sprawl.

AI CAPABILITY

No native AI module advertised. Customers commonly add AI via separate drafting or transcription tools while using CosmoLex for unified practice and accounting.

PRICING

- Standard: $109 / User / Month
- Elite: $129 / User / Month
- FirmsFirst Bundle: $223 / 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.

Rocket Matter
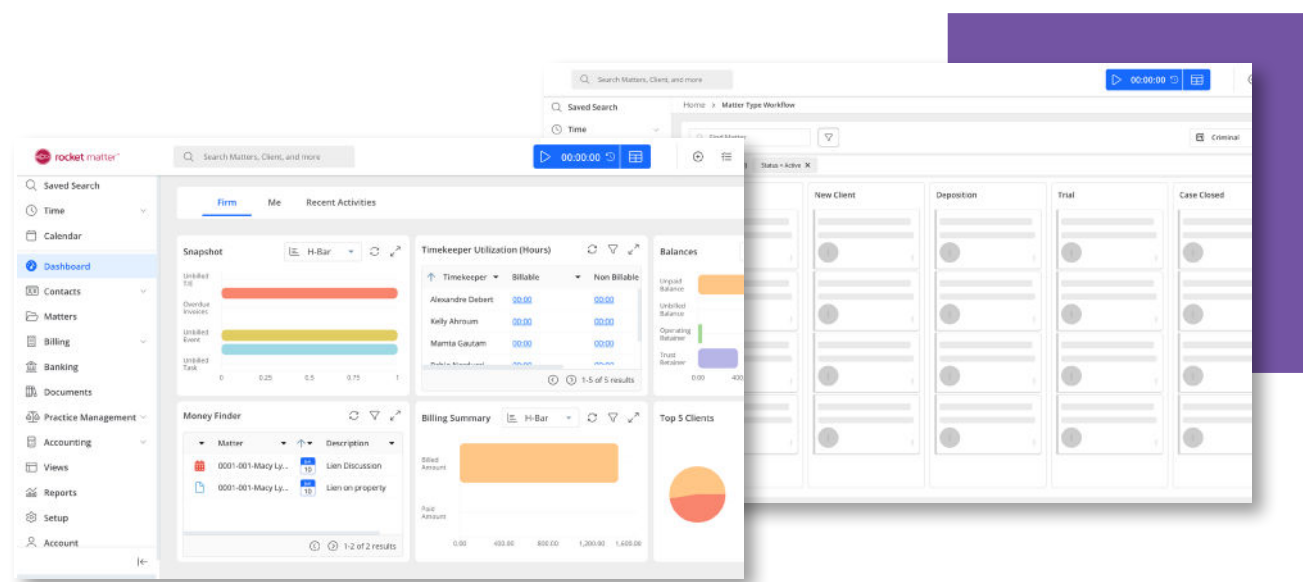
OVERVIEW

Rocket Matter is a veteran cloud LPM focused on helping firms manage matters, time, and billing with an intuitive, modern interface. A project-management style approach (including kanban boards) supports visual tracking of case progress and deadlines.

Built-in collaboration and client document sharing streamline exchanges with clients and third parties. For teams that favor simple, flexible dashboards and efficient billing cycles, Rocket Matter keeps essential tools close at hand.

DEPLOYMENT
Cloud-Based

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

✳️ Available within a Private Cloud

WHO ROCKET MATTER IS GOOD FOR
Rocket Matter is ideal for firms that favor visual, project-style matter tracking and efficient time/billing workflows. It fits teams that share documents frequently with clients and third parties and want a clean, modern interface.

With clear plan tiers and configurable dashboards, firms can start quickly and tune views and processes as staffing and caseloads grow.

DOCUMENT AND EMAIL MANAGEMENT
Cloud storage plus basic DMS features; firms with very large archives sometimes pair with a dedicated DMS.

PRODUCT HIGHLIGHTS
- Project-style matter management with kanban views and streamlined tasking.
- Document assembly with templates and auto-filed outputs to matters; integrated sharing and secure requests from clients.
- Built-in online payments and legal trust accounting.
- Integrations with leading DMS platforms and productivity tools.

AI CAPABILITY
Rocket Matter has announced ChatGPT-based features to assist with drafting and summarizing within the app, delivered as an integration rather than a proprietary assistant.

PRICING
- Essentials: $49 / User / Month
- Pro: $79 / User / Month
- Premier: $99 / User / Month
- Elite: $129 / User / Month

Pricing is based on an annual subscription and is accurate as of the publication of this report.
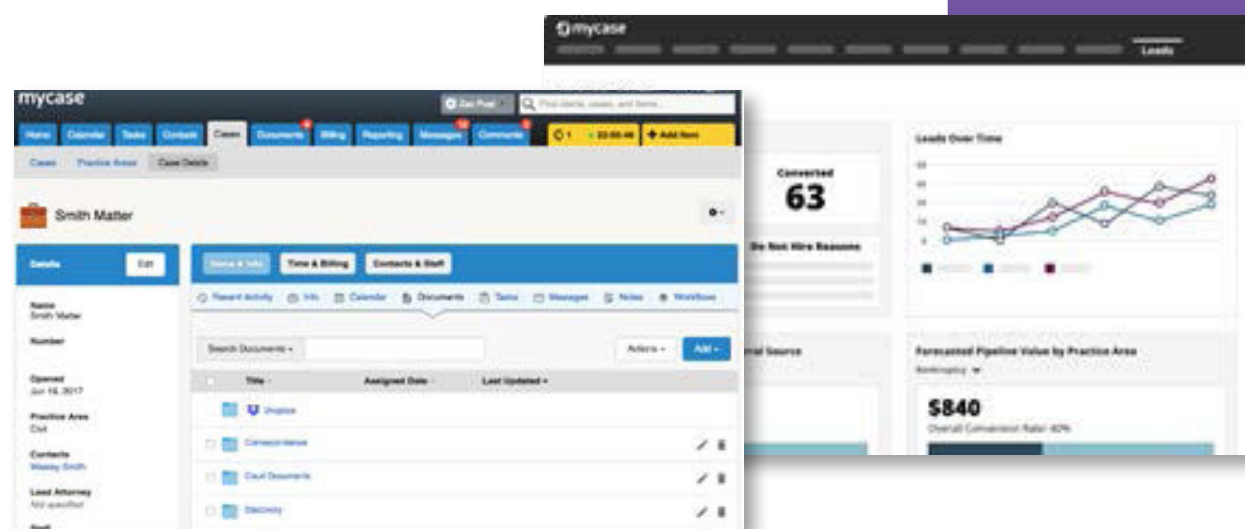
FREE TRIAL
Rocket Matter offers a free trial. **Try Rocket Matter for Free Here**.

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 an easy-to-use cloud platform known for its strong client portal and streamlined, end-to-end experience from intake to payment. Core matter management sits alongside calendaring, tasks, and document sharing to keep firms and clients in sync.

Built-in payments and accounting (MyCase Accounting) help unify billing and receivables while maintaining clear trust handling. Firms adopt MyCase to improve client communication and reduce friction in daily operations.

DEPLOYMENT
Cloud-Based

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

✳️ Available within a Private Cloud

WHO MYCASE IS GOOD FOR

MyCase is ideal for firms that prioritize a best-in-class client portal and a streamlined path from intake to payment. It fits practices that want an approachable system with strong collaboration and sharing.

With built-in payments and optional accounting, firms can keep billing centralized while expanding features and automations as the firm grows.

DOCUMENT AND EMAIL MANAGEMENT

Cloud storage with matter-centric filing and sharing; some firms add a dedicated DMS for complex needs.

PRODUCT HIGHLIGHTS

- Extremely approachable UI and fast implementation, popular with small firms.
- One of the strongest client portals for secure messaging, document exchange, and payments.
- Native intake/lead management to streamline onboarding.
- Optional MyCase Accounting to keep billing and books in one place (or connect to alternatives).

AI CAPABILITY

MyCase offers MyCase IQ—AI-assisted features like summarization and drafting embedded in workflows—with an expanding roadmap for analytics and search.

PRICING

- Basic: $39 / User / Month
- Pro: $89 / User / Month
- Advanced: $109 / User / Month

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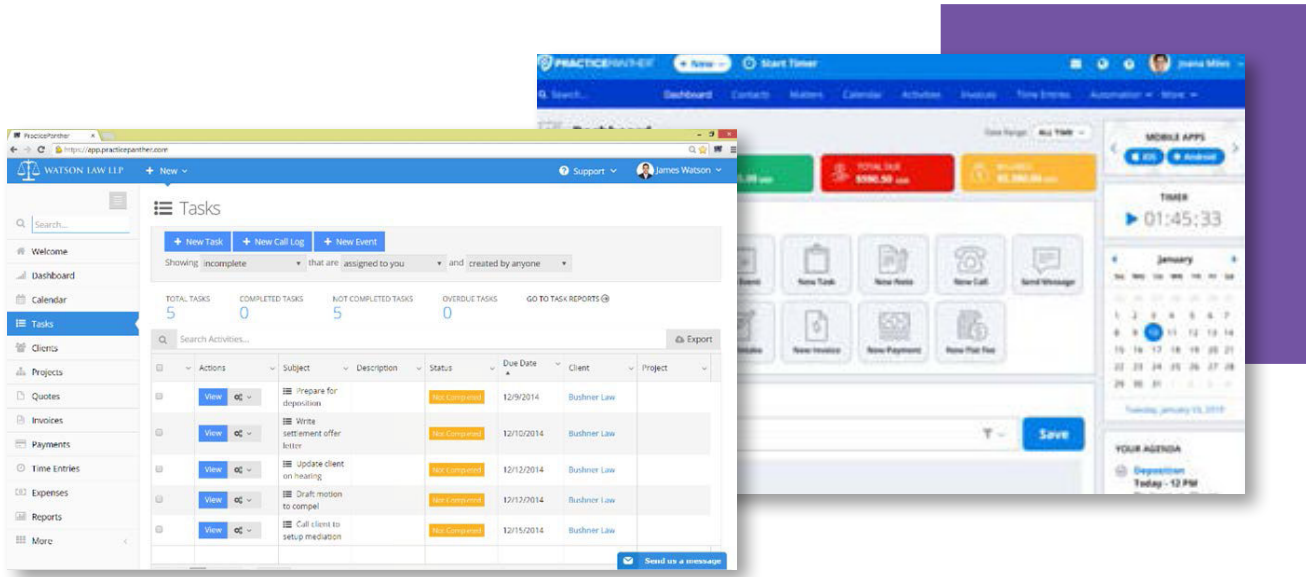
FREE TRIAL

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.

PracticePanther

OVERVIEW

PracticePanther offers modern, browser-based practice management with straightforward navigation and quick adoption for busy teams. Matters, time and billing, tasks, and payments live together to simplify routine casework and invoicing.

A lightweight CRM supports intake and lead tracking for firms that want basic pipeline visibility without extra tools. For solo and small firms seeking practical features and a clean UI, PracticePanther keeps daily workflows efficient.

DEPLOYMENT
Cloud-Based

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

✳ Available within a Private Cloud

WHO PRACTICEPANTHER IS GOOD FOR
PracticePanther is ideal for solo and small firms that want an intuitive interface, integrated payments, and a lightweight CRM for intake and pipeline visibility. It fits teams looking for quick adoption and minimal training.

With simple plan tiers and practical automations, firms can get running fast and layer in more workflows and integrations over time.

DOCUMENT AND EMAIL MANAGEMENT
PracticePanther includes cloud storage with some lightweight features of document management.

PRODUCT HIGHLIGHTS
- Clean, intuitive interface and built-in CRM to manage intake and prospect pipelines.
- Integrated online payments with support for payment plans and streamlined collections.
- Configurable dashboards, reporting, and automations that help smaller teams run lean.
- Mobile access and broad feature coverage (time/billing, trust, calendaring, document tools).

AI CAPABILITY
No native AI assistant is advertised; the product emphasizes core automation and workflows. Firms add AI through separate drafting or analysis tools if desired.

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.
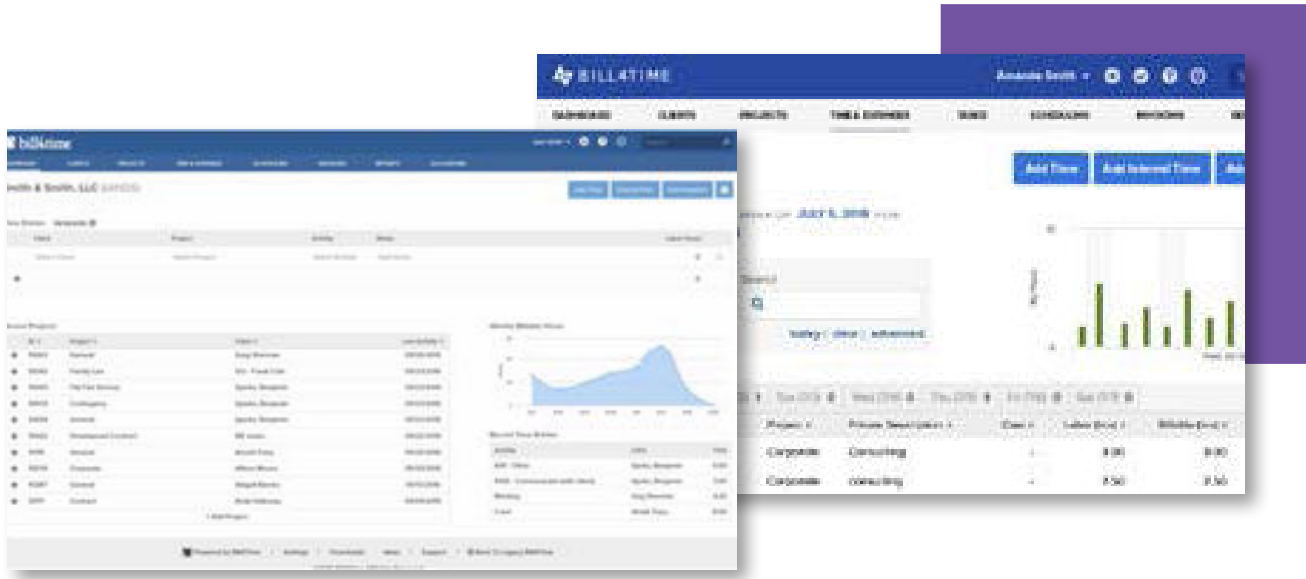
FREE TRIAL
PracticePanther offers a free trial. **Try PracticePanther for Free Here**.

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

Bill4Time began as a time and billing solution and has grown into a broader LPM with matter management and trust accounting. Its hallmark is flexible, compliant billing—supporting LEDES/UTBMS, split arrangements, and detailed approvals.

Firms can centralize entries, invoices, and payments while tracking trust balances and reconciliation. For practices with nuanced billing needs, Bill4Time provides a clear, structured path from captured time to collected revenue.

DEPLOYMENT

Cloud-Based

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

✳️ Available within a Private Cloud

WHO BILL4TIME IS GOOD FOR

Bill4Time is ideal for firms that need flexible billing structures—LEDES/UTBMS, splits, and approvals—alongside reliable trust accounting and solid matter management. It fits practices with nuanced billing and compliance needs.

With editions ranging from Time & Billing to full LPM, firms can start where they are and upgrade capabilities as requirements and case complexity increase.

DOCUMENT AND EMAIL MANAGEMENT

Bill4Time includes cloud storage with some document management features.

PRODUCT HIGHLIGHTS

- Originated as time & billing and expanded into a full legal stack; still known for robust timekeeping and nuanced billing.
- Trust/IOLTA accounting with reconciliation and reporting resources.
- LEDES support and legal billing codes for corporate clients.
- Built-in tasking and matter tools to tie work to invoices efficiently.

AI CAPABILITY

No native AI advertised. Firms commonly pair Bill4Time with separate AI utilities for drafting or analysis while relying on B4T for billing and trust.

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.
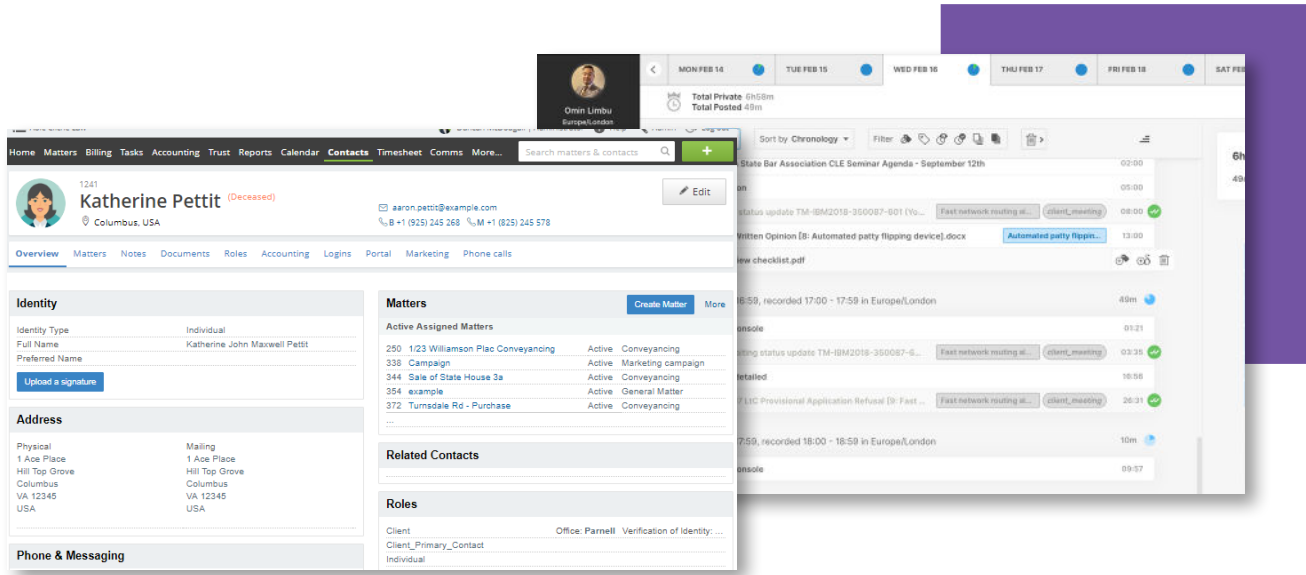
FREE TRIAL

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.

Actionstep

OVERVIEW

Actionstep is a comprehensive cloud platform for midsize firms that unifies intake, matter management, document management, time, billing, and legal accounting. Highly configurable workflows and data fields help firms mirror real-world processes inside the system.

Reporting and dashboards give leadership visibility into productivity, WIP, and financial performance. With guided implementation, firms can align Actionstep to practice areas and scale it as teams and caseloads grow.

DEPLOYMENT
Cloud-Based

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

✳ Available within a Private Cloud

WHO ACTIONSTEP IS GOOD FOR
Actionstep is ideal for midsize firms that want an end-to-end platform—intake, matter management, DMS, time/billing, legal accounting, and trust—with configurable workflows. It fits teams ready to align software with firm-specific processes.

With guided implementation and tiered editions, firms can tune Actionstep to practice areas today and scale capabilities as headcount and caseload expand.

DOCUMENT AND EMAIL MANAGEMENT
Basic Document Management. You are able to store and organize your documents to find them easily later.

PRODUCT HIGHLIGHTS
- End-to-end platform with intake, matter workflows, document management, time/billing, and full legal accounting—built to scale with midsize firms.
- Highly configurable workflows and data fields for practice-area-specific processes.
- Strong trust accounting and business reporting for financial visibility and compliance.
- Document storage with Microsoft 365 and cloud-drive integrations for firms that prefer external DMS.

AI CAPABILITY
Actionstep has introduced native AI features in select areas (e.g., AI-assisted time suggestions and Outlook filing aids, contextual help), with positioning that continues to evolve as the platform expands.

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**.

Centerbase
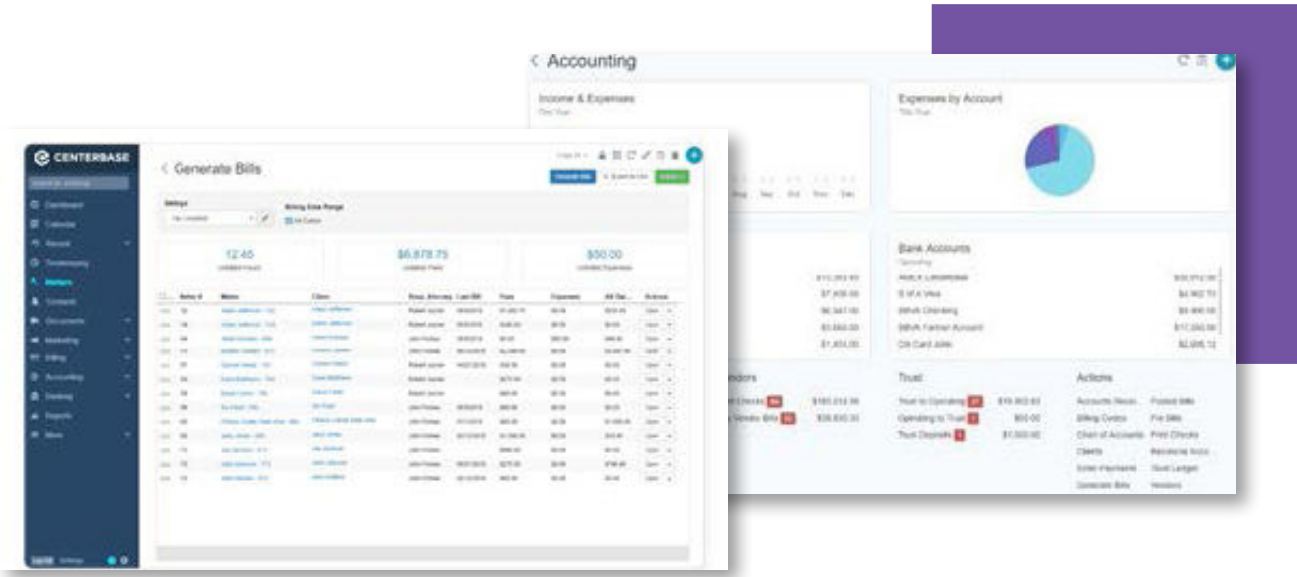
OVERVIEW
Centerbase is a customizable cloud LPM that combines matter management, time and billing, and native general-ledger accounting. Firms tailor matter types, fields, and workflows to match their practice structure and internal rules.

Email and document tools keep communications and files organized in the context of each case. For teams that need a flexible, all-in-one platform, Centerbase reduces vendor sprawl while preserving room for firm-specific configurations.

DEPLOYMENT
Cloud-Based

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

✳️ Available within a Private Cloud

WHO CENTERBASE IS GOOD FOR
Centerbase is ideal for firms that need a highly customizable cloud platform with native general-ledger accounting plus matter, time, and billing. It fits practices that want one system tailored to unique workflows.

With configurable matter types, fields, and automations, firms can shape processes to match solo, boutique, or multi-office operations and evolve functionality over time.

DOCUMENT AND EMAIL MANAGEMENT
Cloud storage with DMS features; firms with significant legacy data sometimes supplement with external storage or a dedicated DMS.

PRODUCT HIGHLIGHTS
- Customizable cloud LPM with native general-ledger accounting plus matter, time, and billing in one platform.
- Deep configuration of matter types, fields, and automations to mirror firm-specific processes.
- Email and document tools to keep communications and files organized in the context of each case.
- Reduces vendor sprawl while preserving room for firm-level tailoring and growth.

AI CAPABILITY
No proprietary, native AI assistant is advertised as of now; firms typically incorporate AI through complementary tools while using Centerbase as the all-in-one operational hub.

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.
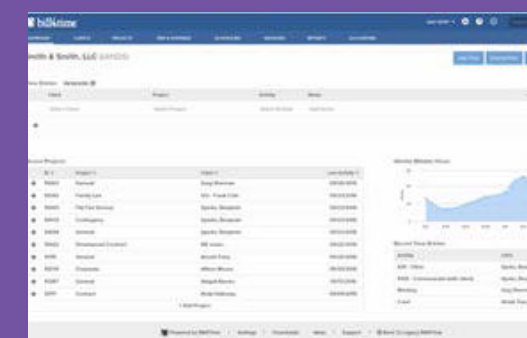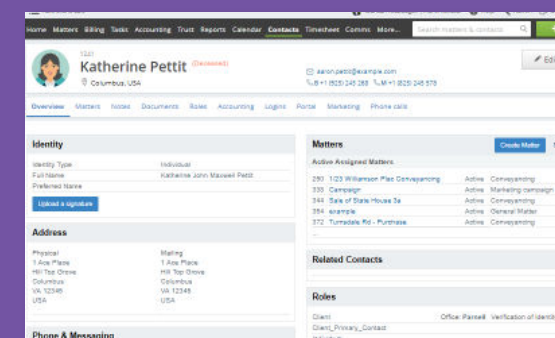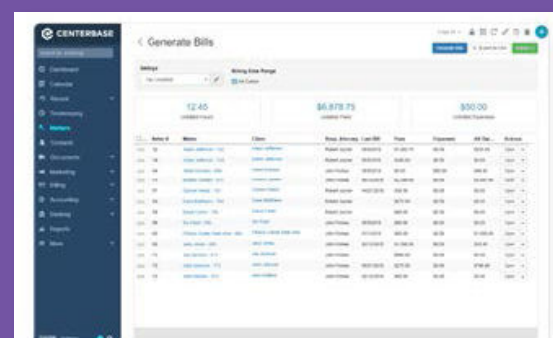
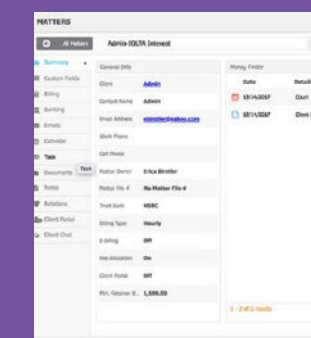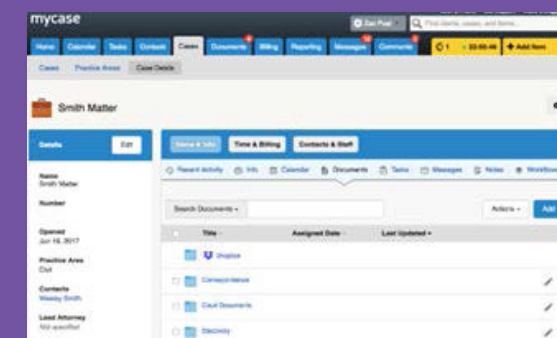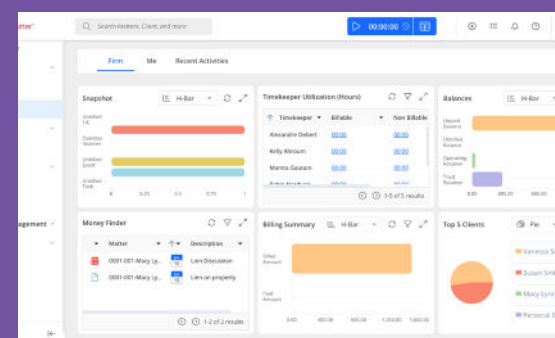# Law Practice Management Comparison Table

✅ 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
Clio Manage	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PCLaw	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Private Cloud	Yes	Yes
Tabs3	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Yes	Yes
ProLaw	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Yes	Yes
Time Matters	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Yes	No
Smokeball	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LEAP	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
CosmoLex	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
Rocket Matter	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
MyCase	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
PracticePanther	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
Bill4Time	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud
Actionstep	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Centerbase	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Private Cloud	Private Cloud

Notes

Book a Consultation to Review Your Current Tech Stack

BOOK NOW

PART 2

Legal Document Management Software

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 2025, we'll first define what Document Management Systems are, what they do, and how they differ from Practice Management software.

Document Management Overview

Generally speaking, Document Management Software—often called a Document Management System (DMS)—stores your documents and provides tools to organize, secure, search, and govern them across your firm.

The "management" piece is what separates a true DMS from a basic on-premise file server or simple cloud storage (Google Drive, OneDrive, Dropbox). A legal-grade DMS adds matter-centric filing, metadata, version control, audit trails, and convenient email filing—capabilities built for day-to-day legal work and compliance.

Document Management Features

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

As you evaluate Document Management Software, consider which deployment best fits your firm's needs. In practice, you 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)

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.

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.

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.

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.
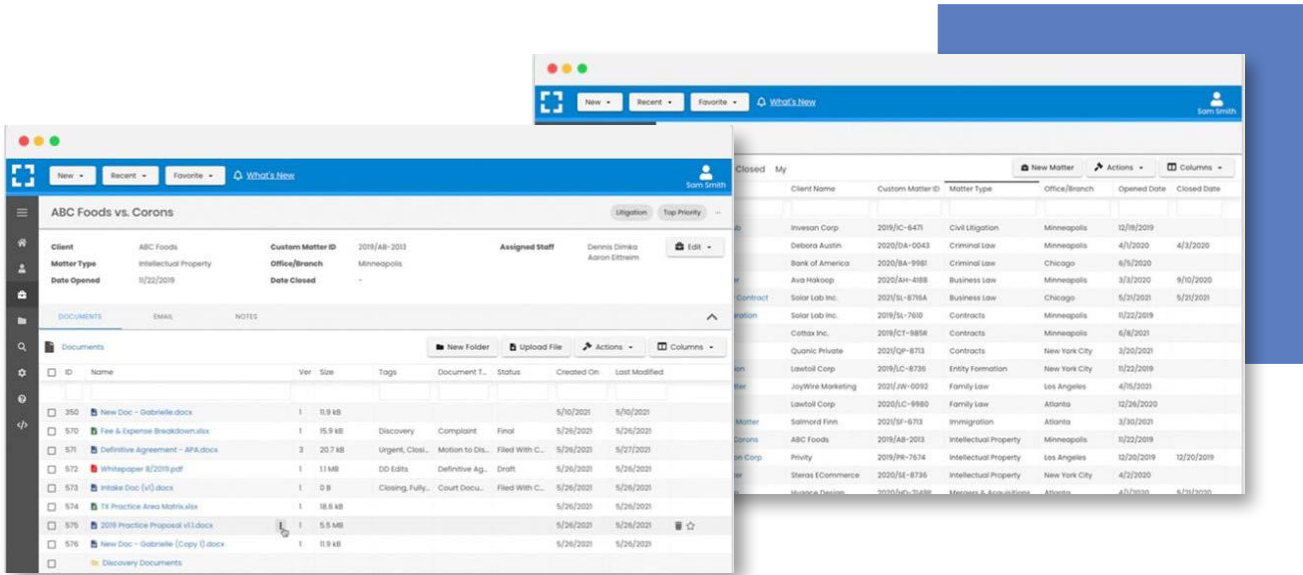
End-to-End Data Encryption
Full encryption of your data in-transit and at-rest, adding enhanced security and compliance.

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 designed for law firms. It centralizes documents, emails, and notes by client/matter so work product is profiled, indexed, and easy to find later.

A practical emphasis on everyday usability—search, versioning, Outlook integration, and permissioning—helps firms standardize filing and retrieval without heavy IT lift. Cross-platform support means attorneys and staff can work from Windows or macOS with equal ease.

DEPLOYMENT
Cloud-Based

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
- ✅ Matter Notes
- ✅ Windows and MacOS
- ✅ Compatibility
- ✅ End-to-End Data Encryption
- ✅ Multi-Factor Authentication
- ✅ Geographic Data Redundancy

WHO LEXWORKPLACE IS GOOD FOR

LexWorkplace is best for firms of roughly 3–50 users that want to leave on-prem file servers and basic cloud drives behind in favor of a legal-grade, matter-centric DMS. It suits teams that want predictable costs, built-in security, and minimal maintenance.

It's also a strong fit for firms already using practice management software that want a dedicated DMS to handle documents and email with legal-specific controls and search.

PRODUCT HIGHLIGHTS

- Simple, legal-centric structure that keeps documents and email organized by matter.
- Powerful search across documents, tags/metadata, and emails to find content quickly.
- Security built-in: encryption, MFA, access controls, and geographic redundancy.
- Easy internal sharing/collaboration with matter context preserved.
- Native Windows and macOS compatibility (no virtual desktops or workarounds).

AI CAPABILITY

LexWorkplace includes AI-assisted search features to improve findability across documents and email.

PRICING

Starter: Free for Uptime Practice Users
Core: $395 / Month - 3 Users & 1 TB Storage Included
Advanced: $595 / Month - 3 Users & 1 TB Storage Included

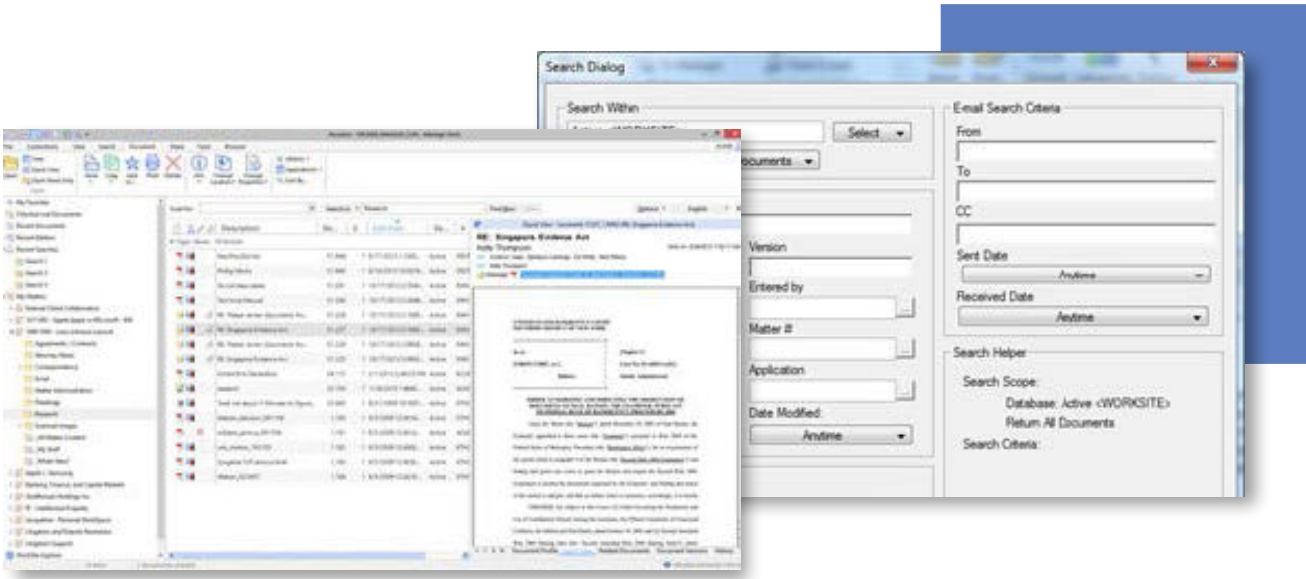LexWorkplace offers a free trial. **Try LexWorkplace for free here**.

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-standing DMS for documents and email with deep profiling, security, and knowledge capabilities. Its mature search and governance features are designed for large volumes of content and complex matter work.

Modern deployments increasingly leverage iManage Cloud for performance, security, and easier lifecycle management—while some organizations still run on-prem or in a managed private cloud.

DEPLOYMENT
On-Premise

WHO iMANAGE IS GOOD FOR
Best for larger firms (often 50+ users) and legal departments with significant content, governance needs, and internal IT or certified partners to manage roll-outs and integrations.

It fits organizations that want robust email management, knowledge search, and granular security/ethical walling, plus optional records and retention add-ons.

PRODUCT HIGHLIGHTS
• Enterprise-grade DMS + email management with strong profiling and security.
• Powerful search with scalable indexing for documents and email.
• Flexible deployment: iManage Cloud, on-prem, or managed private cloud.

AI CAPABILITY
Native iManage AI features to help summarize, find, and act on knowledge across documents and email.

PRICING
The company does not provide public pricing information. Potential customers must contact an iManage reseller to obtain pricing for the software and implementation.
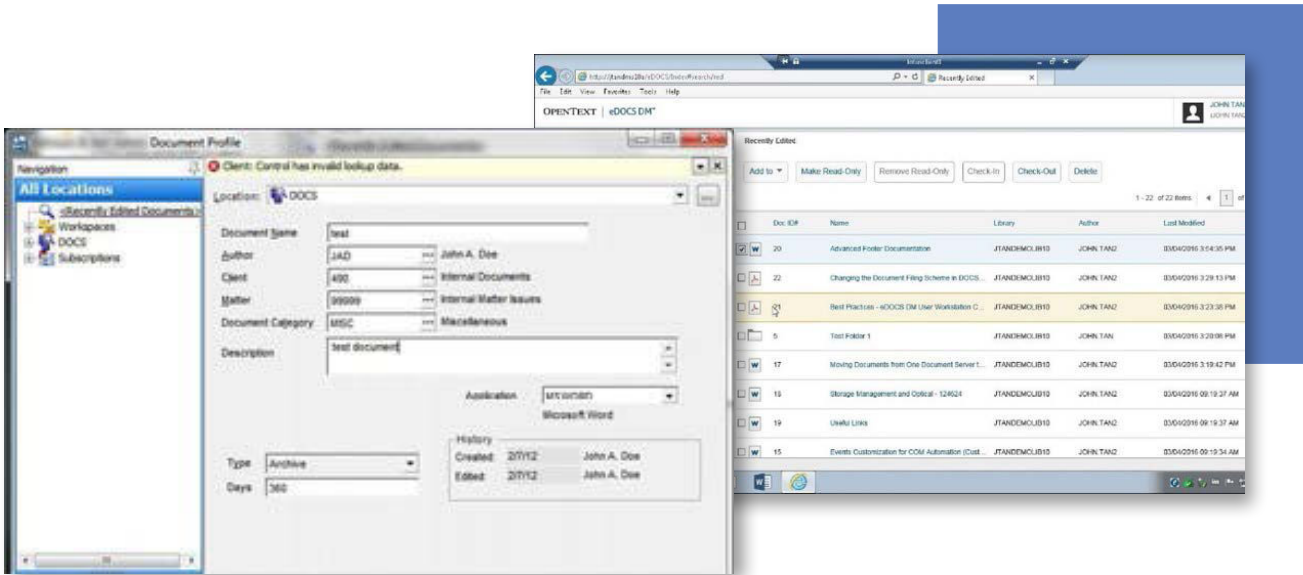
iMANAGE IN THE CLOUD
iManage Work is server-based, which means it can be run on your firm's on-premise servers or within a fully-managed Private Cloud.

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**

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
- 🔴 Matter Notes
- 🔴 Windows and MacOS Compatibility
- ✳️ End-to-End Data Encryption
- ✳️ Multi-Factor Authentication
- ✳️ Geographic Data Redundancy

eDOCS

OVERVIEW
OpenText eDOCS (formerly Hummingbird) is an enterprise content management platform used by law firms, legal departments, and regulated industries. It brings document and records management, metadata, and security into a centralized system.

Its modern InfoCenter interface provides a customizable, tile-based experience for users while the platform supports broad integrations across the OpenText ecosystem.

DEPLOYMENT
On-Premise

WHO EDOCS IS GOOD FOR
Well-suited to in-house legal teams and larger professional services/government environments that want ECM breadth and are comfortable with enterprise-style implementation and administration.

Firms that need records/retention, distributed architecture options, and deep integration with broader OpenText tools will find eDOCS a logical fit.

PRODUCT HIGHLIGHTS
- Customizable workflows and lifecycle services for documents and records.
- InfoCenter UI with Outlook contact integration and collaboration enhancements.
- Part of the OpenText portfolio with connectors for search, scanning, BPM, and more.

AI CAPABILITY
Focus areas include **auto-classification** and profiling enhancements in InfoCenter releases; broader OpenText AI services exist in the ecosystem, but eDOCS-specific AI is positioned around classification and productivity.
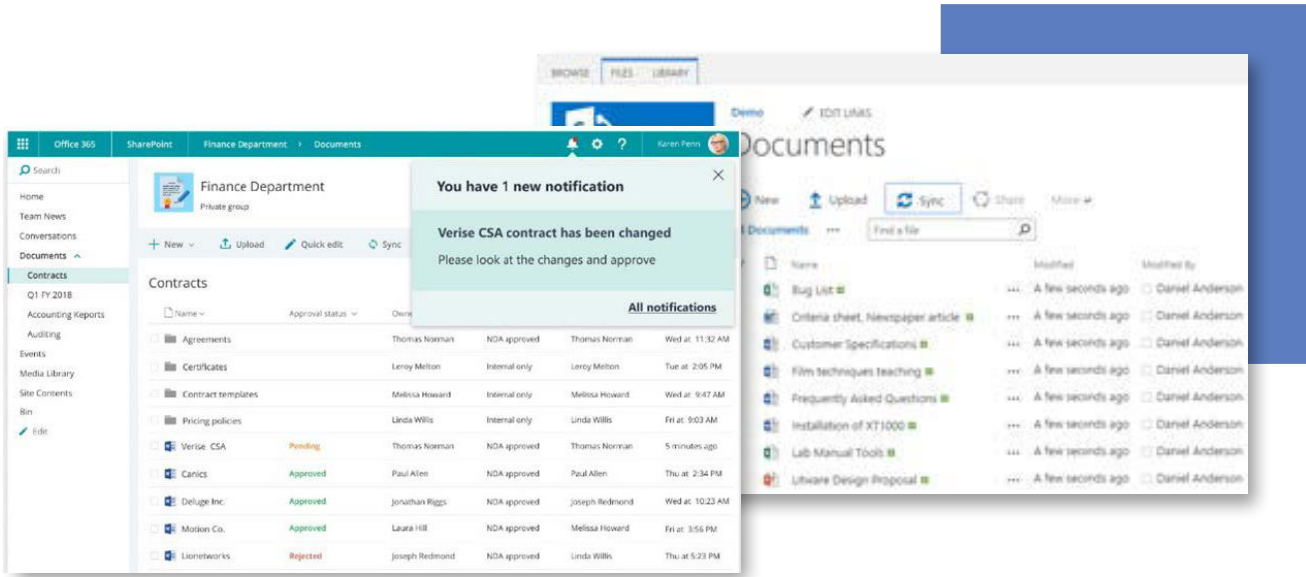
PRICING
The company does not provide public pricing information. Potential customers should **contact OpenText** directly for a proposal for the eDOCS software and implementation.

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
- ⊖ Matter Notes
- ⊖ Windows and MacOS Compatibility
- ✳ End-to-End Data Encryption
- ✳ Multi-Factor Authentication
- ✳ Geographic Data Redundancy

SharePoint

OVERVIEW

Microsoft SharePoint is a widely used content platform and intranet that can be configured to provide DMS-like capabilities. In legal settings it's often used as a lightweight DMS when paired with governance and customization.

Because it's part of Microsoft 365, SharePoint centralizes files, sites, and collaboration with tight Office and Outlook ties—but customization and admin expertise are typically required for a law-firm-ready experience.

DEPLOYMENT

Cloud-Based

WHO SHAREPOINT IS GOOD FOR

A fit for firms that want an all-in-one Microsoft stack with intranet, cloud storage, and configurable document management, especially when they already have internal/partner expertise to tailor it for legal needs.

Teams with specific or evolving requirements can use SharePoint's extensibility, but many law firms still add a legal DMS for matter-centric filing, email capture to matters, and legal governance.

PRODUCT HIGHLIGHTS

- Included in many Microsoft 365 plans; broad ecosystem and admin tooling.
- Highly customizable, but not legal-specific—typically benefits from expert setup and governance.
- Acts as a step up from basic cloud storage, though not a full legal DMS out-of-the-box.

AI CAPABILITY

Copilot for Microsoft 365 works across SharePoint/OneDrive for summarization, Q&A, and content authoring; recent SharePoint features also target AI-native apps and admin "AI insights."

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
- ✴️ Matter Notes
- ➖ Windows and MacOS Compatibility
- ✅ End-to-End Data Encryption
- ✅ Multi-Factor Authentication
- ➖ Geographic Data Redundancy

What happened to Worldox?

Worldox was a long-standing, server-based DMS widely adopted by law firms when there were fewer modern options. Many firms stayed with it for years because it reliably organized matter files and email in a familiar structure.

Following its acquisition, firms generally face two paths: migrate to the acquiring platform or evaluate alternative legal DMS solutions. Neither choice is inherently right or wrong—each comes with its own benefits, costs, and change-management considerations.

Use this report's DMS checklist to weigh your options. As you do, note any pain points you had with Worldox (server upkeep, dated interfaces, limited collaboration).

A modern DMS, at the least, should deliver matter-centric filing, fast search (docs + email), versioning, security/ethical walls, and cloud access without the server burden.

If you'd like help mapping requirements to a short list—or planning a smooth migration—Uptime Legal can guide you through selection, budgeting, and implementation.

Contact us here.

Document Management Software Comparison Table
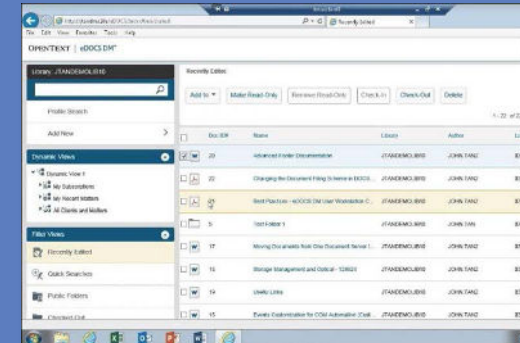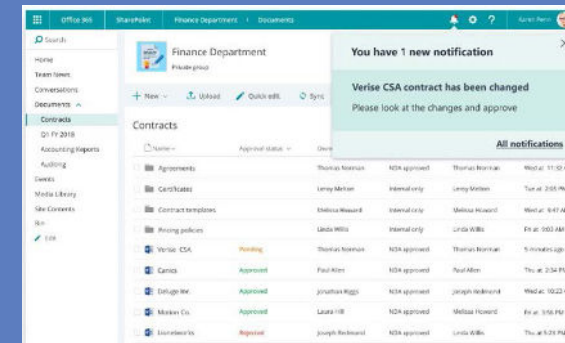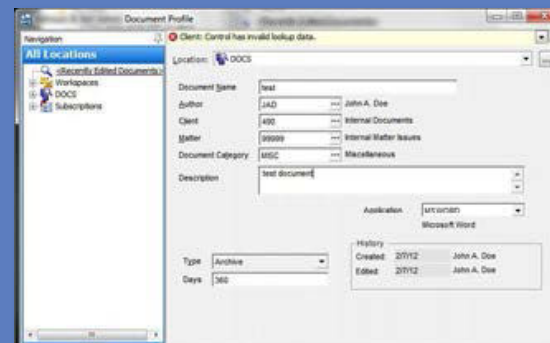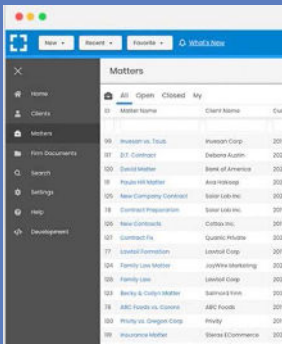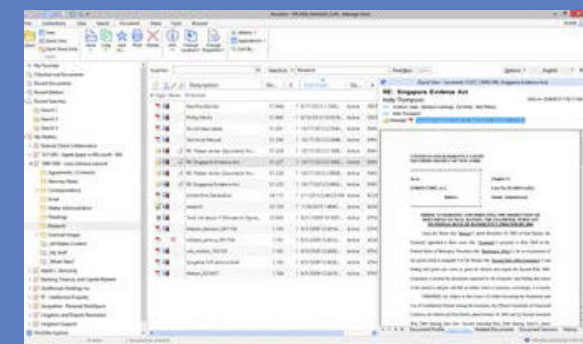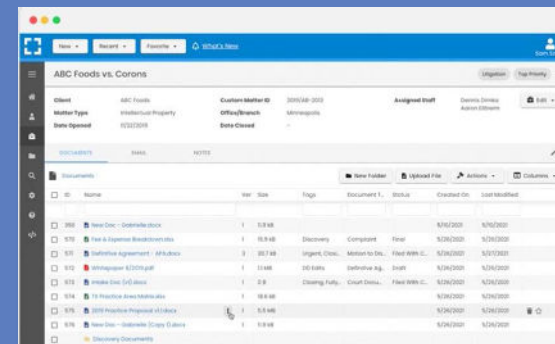
✅ Yes   ⊖ No   ✳ Server/Infrastructure-Dependent

	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 & macOS Compatibility	End-to-End Data Encryption	Multi-Factor Authentication	Geographic Data Redundancy
LexWorkplace	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
iManage	⊖	⊖	✅	✅	✅	✅	✅	✅	✅	⊖	⊖	⊖	✳	✳	✳
eDOCS	⊖	⊖	✅	✅	✅	✅	✅	✅	✅	⊖	⊖	⊖	✳	✳	✳
SharePoint	✅	✳	✅	✅	✅	✅	✅	⊖	✅	✳	✳	⊖	✅	✅	⊖

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LEGAL SYSTEMS

Notes

Book a Consultation to Review Your Current Tech Stack

BOOK NOW

PART 3

Intake & CRM Software

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. The right platform should streamline how new leads are captured, qualified, and followed up while also improving communication with current clients.

As you fold this system into your broader tech stack, look for features that scale with your firm's growth, integrate cleanly with Practice Management and Document Management Systems, and improve—not complicate—your current processes.

Equally important are data security, compliance posture, and user experience so your team can fully capitalize on the software.

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 Relationship

This is a typical law-firm funnel.

A good Legal CRM/Intake platform helps you manage each stage so prospects have a smooth, consistent path from first touch to signed client—and beyond.

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
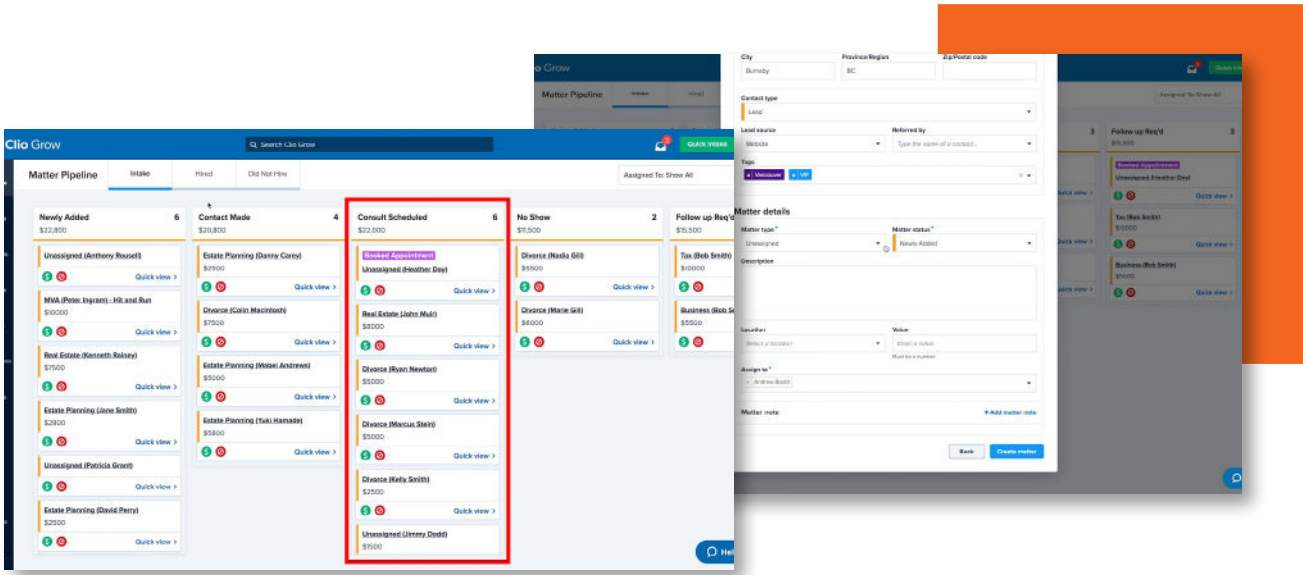
OVERVIEW

Clio Grow is Clio's intake and CRM platform, built to capture, qualify, and onboard clients with shareable intake forms, e-signatures, scheduling, and automated follow-ups.

It functions as a standalone tool or alongside Clio Manage to sync contacts, matters, and activities and cut out double data entry.
Used together, Grow + Manage create a smooth path from first touch to active matter—standardizing how leads are tracked, communications are sent, and retainers are secured.

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

WHO CLIO GROW IS GOOD FOR

Clio Grow is ideal for firms already on Clio Manage, since data flows between systems and onboarding is fast. It suits teams that want simple, reliable intake workflows (forms, e-signatures, appointments) over heavy marketing suites.

It's especially friendly to solos and small teams (≈ under 10 timekeepers) that value clear pipelines, quick setup, and minimal administration.

PRODUCT HIGHLIGHTS

- Seamless handoff to Clio Manage for end-to-end tracking from lead to matter.
- Built-in workflow tools for automated emails, tasks, and engagement agreements.
- Online scheduling and intake forms (with e-signature) to reduce back-and-forth.
- Optional payments at booking via Clio Payments (e.g., consultation fees) when connected to Clio's billing stack.
- Light, approachable UI that makes adoption straightforward for busy staff.

AI CAPABILITY

Clio has introduced Clio Duo (add-on) across the Clio platform; firms can leverage AI-assisted drafting and summaries within supported workflows while keeping intake processes standardized.
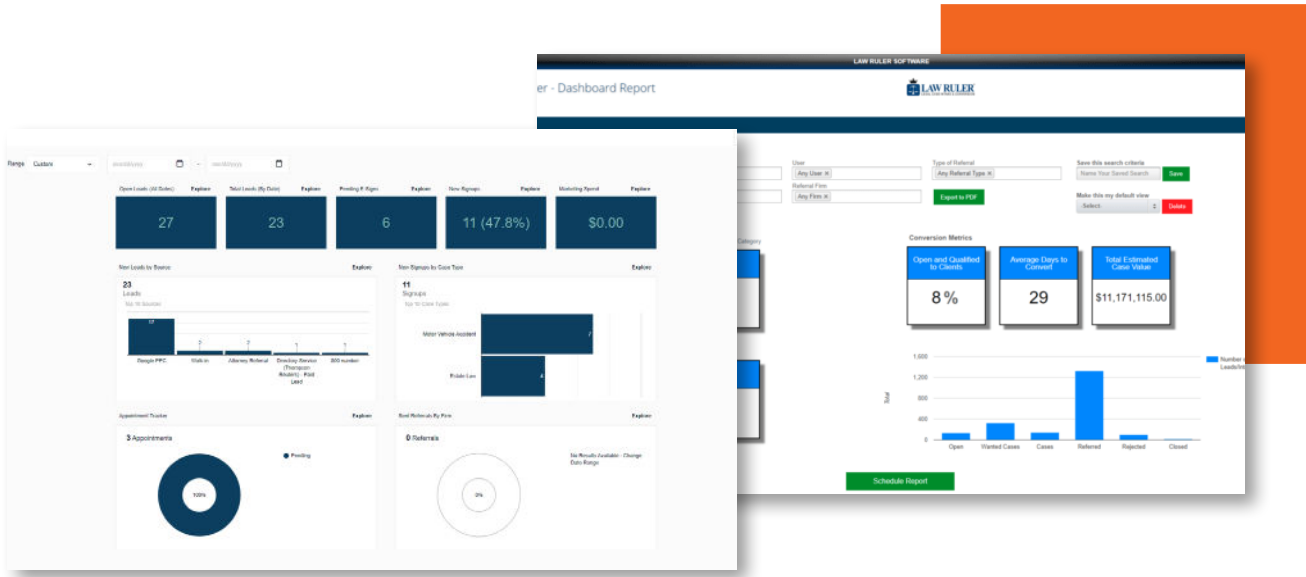
PRICING

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**.

Law Ruler

WHO LAW RULER IS GOOD FOR

Best for high-volume or advertising-driven firms that need to track large lead flows, respond fast, and measure ROI across channels. It suits teams that prioritize practical intake tools and SMS outreach over heavier "all-in-one" marketing suites.

It's also a fit for firms using ProfitSolv products (e.g., CosmoLex, Rocket Matter) or other common LPM tools, thanks to published integrations and partner ecosystem.

PRODUCT HIGHLIGHTS

- Integrations with leading LPM systems (including CosmoLex and Rocket Matter) to reduce duplicate entry.
- SMS texting and softphone features to reach leads immediately and improve connect rates.
- Intake form builders to standardize data capture and automate routing/follow-ups.
- Lead and campaign tracking with reporting to evaluate channel ROI and intake performance.
- Straightforward UI geared toward speed and practical adoption.

OVERVIEW

Law Ruler (ProfitSolv) is a legal-specific CRM, intake, and marketing automation platform built to help firms capture leads quickly, route them to the right workflows, and follow up via email and SMS. Its integrations make it straightforward to plug into an existing legal stack.

The system emphasizes speed to contact (softphone, texting), customizable forms, and pipeline tracking—useful for firms running high-volume campaigns or multiple practice lines.

AI CAPABILITY

Law Ruler offers AI-assisted features (e.g., ChatGPT-based email assistant) to help draft outreach and streamline routine communications.

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
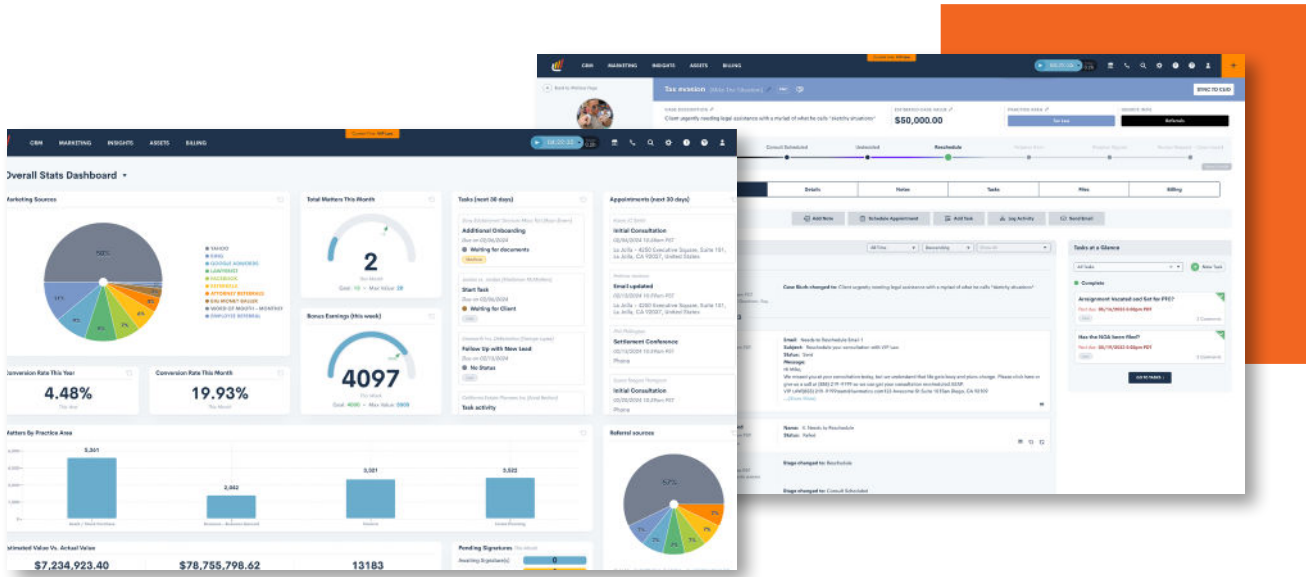
Lawmatics

▰ OVERVIEW

Lawmatics is a legal-focused CRM and marketing automation platform that centralizes intake, email/SMS campaigns, and client experience workflows. It combines form builders, e-signatures, automations, and analytics so firms can nurture prospects from first touch through engagement.

The product's strength is orchestration: mapping each step—initial inquiry, follow-up, scheduling, documents, and reminders—into repeatable, measurable journeys.

▰ WHO LAW RULER IS GOOD FOR

Well-suited to firms that want sophisticated automation around intake and client experience, including multi-step campaigns and conditional workflows. It fits teams looking to scale outreach while maintaining consistent, branded communications.

Firms with marketing leadership or dedicated intake staff will get the most from its deeper automation, segmentation, and reporting features.

▰ PRODUCT HIGHLIGHTS

- Powerful automation for intake, follow-ups, and drip campaigns to reduce manual work.
- Client portal and communication tools to keep prospects informed and engaged.
- Customizable analytics/dashboards for pipeline and marketing performance.
- Integrations to align intake with scheduling, e-signature, and downstream systems.
- Form and document tools to standardize data collection and engagement letters.

▰ AI CAPABILITY

Lawmatics provides LM[AI]—AI-assisted drafting for emails and communications—to help teams produce on-brand outreach faster and reduce time spent on routine writing.

▰ PRICING

The company does not provide public pricing information. Potential customers should **contact Lawmatics** directly.

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
Clio Grow	✅	✅	✅	✅	➖	✅	✅	✅	✅	✅	✅	✅	✅
Law Ruler	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
Lawmatics	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅

Notes

Book a Consultation to Review Your Current Tech Stack

BOOK NOW
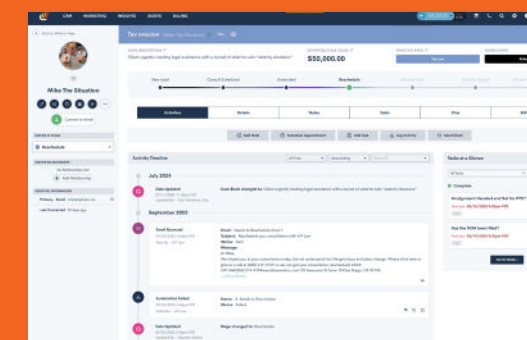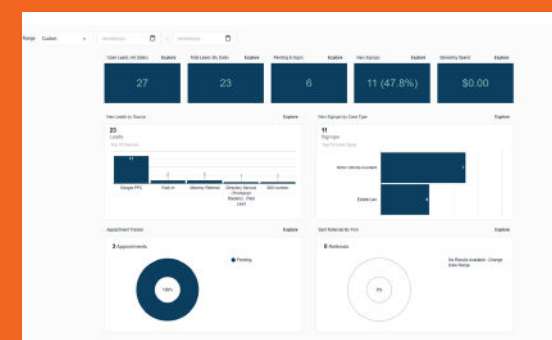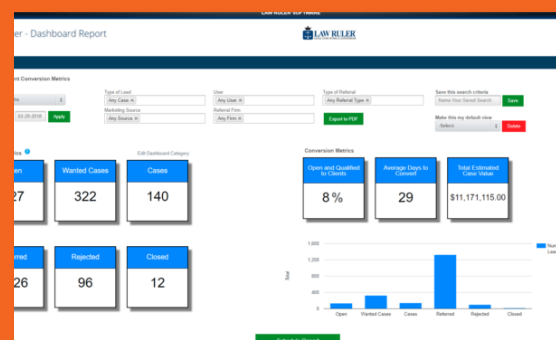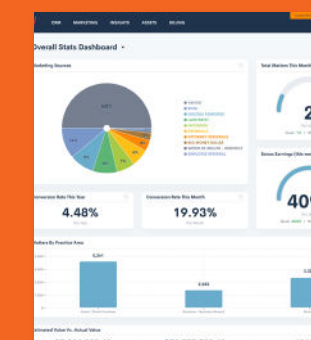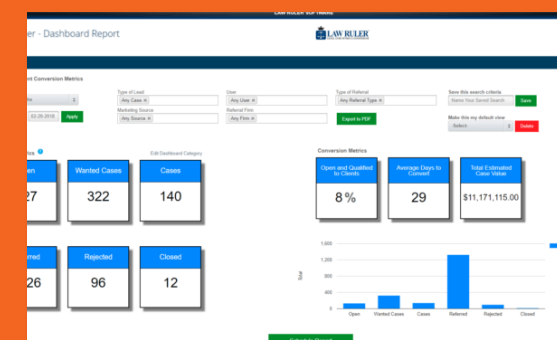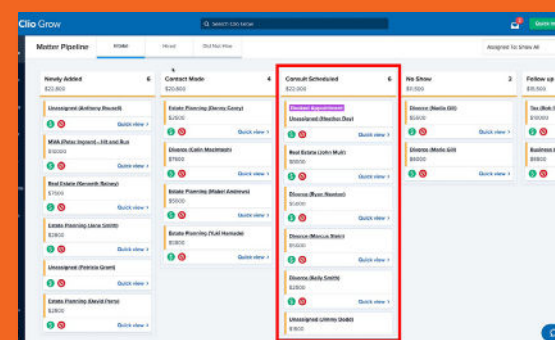
PART 4

Legal Accounting Software

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 platform that streamlines financial operations, safeguards trust compliance, and supports your firm's growth.

Legal Accounting Software Overview & Features

Legal accounting software is built specifically for the way law firms handle money.

It helps ensure compliance with industry rules through tools like detailed financial reporting and trust/IOLTA accounting. Done well, it improves day-to-day efficiency and reduces risk—both essential to protecting your firm's reputation and legal standing.

Key capabilities include trust/IOLTA accounting (including three-way reconciliation) for managing client funds, and flexible billing options—hourly, fixed fee, and contingency—to match different fee agreements.

Robust reporting tailored to legal operations provides visibility for partners and administrators. Just as important, integration with practice management systems keeps matters, billing, and accounting in sync so information flows cleanly across your stack.

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.

The first two opens 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

Installed and operated on your firm's own servers and workstations, giving maximum control over data, customization, and change management.

This approach demands up-front hardware investment and ongoing IT for maintenance, backups, updates, and security. Firms with robust internal or contracted IT support are best positioned to manage the day-to-day care of server environments.

Cloud-Based Software

Hosted by the vendor and accessed over the internet, offering flexibility, scalability, and anywhere access. Updates, backups, and infrastructure are handled by the provider, often lowering up-front costs and making expenses more predictable.

The trade-off is relying on the vendor's security and data-management model, with fewer low-level customization options than a server install. For many firms, the reduced IT overhead and collaboration benefits make cloud a strong default.

Hosted Software

A hybrid path: run traditional on-premise software in a secure, fully managed Private Cloud. This preserves the depth and desktop experience of server-based systems while offloading server ownership, patching, and monitoring.

Performance and reliability often improve, though total cost can exceed pure cloud over time. Hosted deployments fit firms that want on-premise richness and customization without managing physical 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.

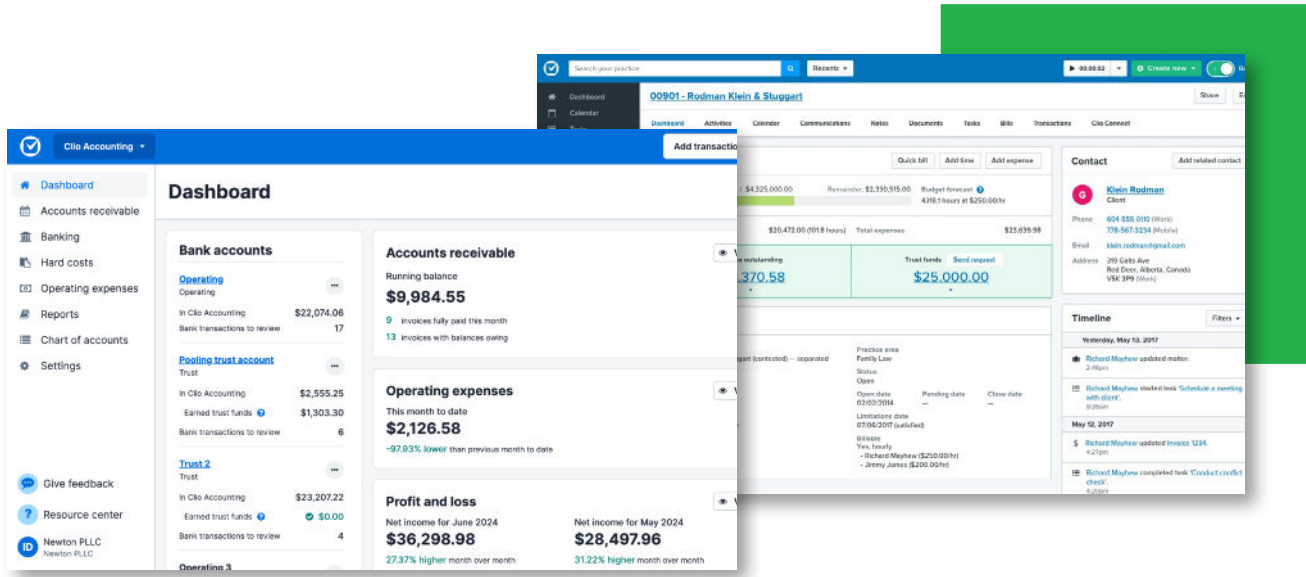**Trust Accounting with Three-Way Reconciliation**
Advanced trust accounting capabilities to ensure accuracy and compliance with legal standards.

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

Clio Accounting

OVERVIEW
Clio Accounting is a legal-specific accounting platform that connects tightly with Clio Manage and Clio Payments to centralize billing, payments, operating accounting, and trust accounting in one system. Firms can run general ledger, A/R, A/P, and robust financial reporting while staying compliant with trust rules—including true three-way trust reconciliation. Bank feeds, chart of accounts, and journal entries live natively in Clio Accounting, reducing manual work and data drift between systems.

WHO CLIO IS GOOD FOR
Ideal for small to midsize firms—especially those already on Clio Manage—seeking built-in GL plus compliant trust accounting with bank feeds. If you want a single, legal-aware system for invoicing, payments, and accounting (instead of stitching together general accounting tools), Clio Accounting is a strong fit.

PRODUCT HIGHLIGHTS
- Integrated billing + payments + accounting in one workspace; fewer manual entries across systems.
- True three-way trust reconciliation and audit-ready reporting.
- Native chart of accounts, GL reporting, and bank feed matching to speed monthly close.
- Designed for lawyers and bookkeepers—no generic add-ons required.

AI CAPABILITY
Clio offers Clio Duo, a native AI assistant within the Clio platform (summaries, drafting, retrieval). Accounting-specific automations remain rules-based; no claim of AI performing reconciliations or GL work.

PRICING
EasyStart: $49 / User / Month
Essentials: $89 / User / Month
Advanced: $119 / User / Month
Complete: $149 / 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**.

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

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.

AI CAPABILITY
Includes Intuit Assist and AI "agents" in QuickBooks Online for drafting invoices, categorizing expenses, and automating bookkeeping tasks; human review still required for compliance.

PRICING
- Simple Start: $38 / Month - Includes 1 User
- Essentials: $75 / Month - Includes 3 Users
- Plus: $115 / Month - Includes 5 Users
- Advanced: $275 / Month - Includes 25 Users

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**

OVERVIEW
QuickBooks (Intuit) is a mainstream accounting platform available as QuickBooks Online (cloud) and QuickBooks Desktop Enterprise. It is not legal-specific, but it covers broad accounting needs—GL, A/R, A/P, bank feeds, financial statements—and integrates with many legal tools. Firms often pair it with legal practice software for trust compliance (QuickBooks itself does not do true three-way trust reconciliation).

WHO QUICKBOOKS IS GOOD FOR
Best for firms that don't need legal-specific trust compliance inside the accounting app and prefer a widely known, easy-to-staff general accounting system that integrates with other tools.

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

Centerbase

OVERVIEW

Centerbase is a customizable cloud LPM with native, full-fledged accounting (GL, A/R, A/P) and trust accounting. It offers configurable matter types, workflows, and reporting, while its accounting module supports bank feeds, three-way trust reconciliation, and law-firm-specific financials—reducing the need for external accounting systems.

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.

AI CAPABILITY

No proprietary, native AI assistant publicly advertised. Emphasizes configurable workflows and embedded accounting; AI typically added via integrations/third-party tools.

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
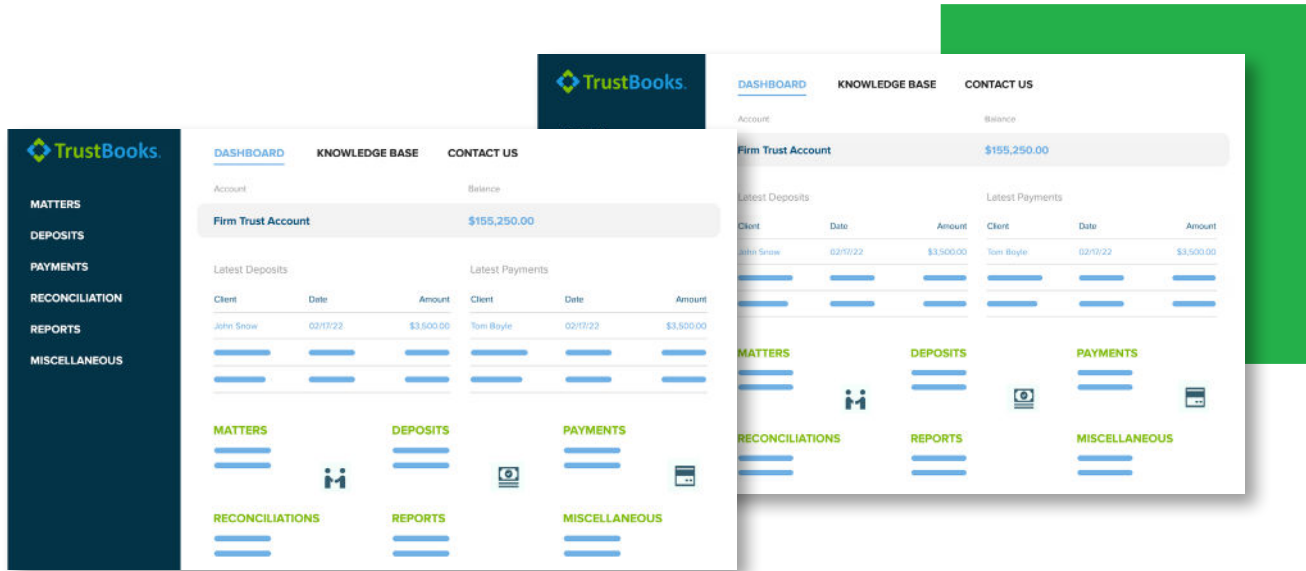
OVERVIEW
TrustBooks is a cloud application dedicated to legal trust/IOLTA accounting. It focuses on preventing common trust errors, automating three-way trust reconciliations, and keeping firms bar-compliant—with bank feeds to minimize manual entry. It's intentionally narrow: trust only (not general business accounting).

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.

AI CAPABILITY
No proprietary, native AI assistant publicly advertised. Emphasizes configurable workflows and embedded accounting; AI typically added via integrations/third-party tools.

TRUSTBOOKS IN THE CLOUD
No native AI assistant; focuses on compliant trust accounting with automated (non-AI) three-way reconciliation workflows.

PRICING
- Tier One: $59 / Month
- Tier Two: $79 / Month
- Tier Three: $249 / Month

FREE TRIAL
TrustBooks offers a free trial. **Try TrustBooks for free here**.

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

PCLaw

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.

AI CAPABILITY
No native AI module. Firms generally pair external research/drafting AI while using PCLaw for billing, GL, and trust compliance.

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**

OVERVIEW
PCLaw combines matter management, time/billing, and full business + trust accounting in one desktop/server-based system. Firms rely on it for legal-centric GL, flexible billing, and comprehensive reporting, with established workflows for trust compliance and bank reconciliation (including online banking capabilities in supported setups).

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.

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.

AI CAPABILITY

No native AI assistant. Often deployed alongside external AI research/drafting tools; accounting and billing remain rules-based.

PRICING

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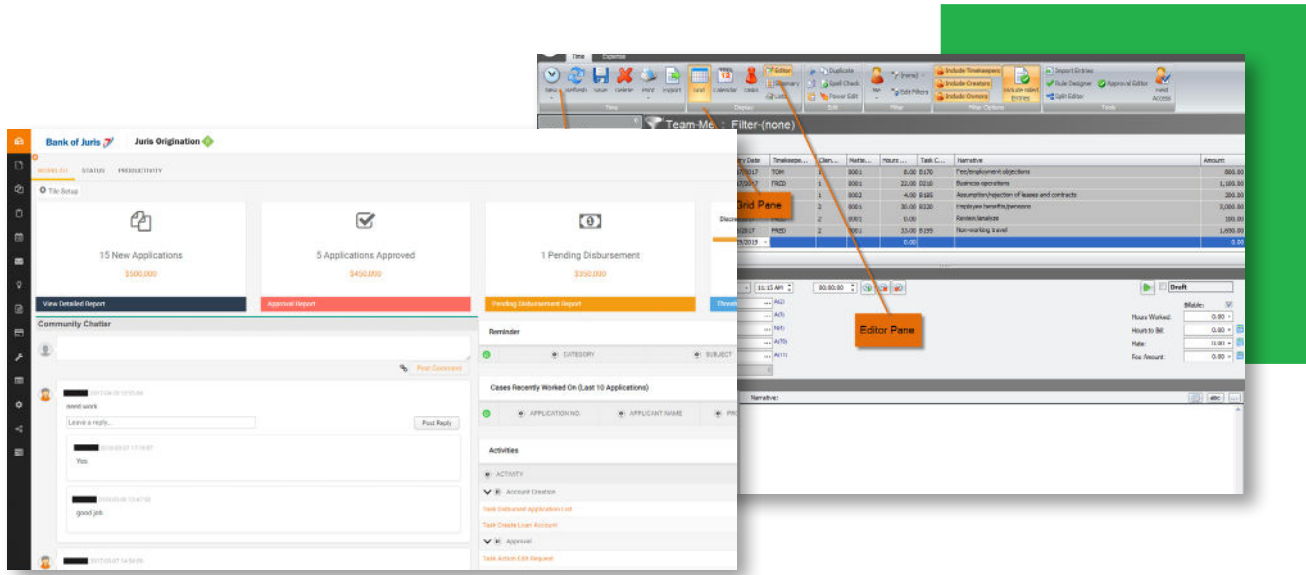
JURIS IN THE CLOUD

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.

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.

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

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.

AI CAPABILITY

No native AI assistant. Often deployed alongside external AI research/drafting tools; accounting and billing remain rules-based.

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 fully-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
Clio Accounting	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
QuickBooks	✅	⊖	✅	✅	⊖	✅	✅	✅	✅	✅	✅	✅	⊖	⊖
Centerbase	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
TrustBooks	⊖	✅	✅	⊖	✅	⊖	⊖	✅	✅	⊖	⊖	⊖	✅	⊖
PCLaw	✅	✅	✅	✅	✅	✅	✅	✅	⊖	⊖	✅	✅	✅	⊖
Juris	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
ProLaw	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅

Uptime
LEGAL SYSTEMS

Notes

Book a Consultation to Review Your Current Tech Stack

BOOK NOW

Appendix A:

Legal Software Glossary

1. **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.

2. **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.

3. **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.

4. **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.

5. **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.

6. **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.

7. **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.

8. **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.

9. **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.

10. **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.

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. **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.

13. **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.

14. **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.

15. **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.

16. **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.

17. **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.

18. **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.

19. **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.

20. **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.

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. 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.

23. 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.

24. 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.

25. 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.

26. 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.

27. 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.

28. 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.

29. 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.

30. 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.

31. 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.

32. 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.

33. 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.

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

Artificial Intelligence & Legal Software (2025)

There's been no shortage of commentary about AI and the practice of law—ranging from highly practical to deeply philosophical. Our aim here is simple: give firms a clear, useful frame for how AI shows up inside modern legal software, what to watch for, and how to adopt it responsibly.

Why now?

AI has been a topic for years, but recent advances made it tangible in day-to-day legal work. The shift is from "use a separate AI tool" to **AI embedded directly in the platforms you already rely on**—from intake and practice management to document management and accounting. That embedded approach matters: it keeps work product, permissions, audit trails, and records of decision in one system..

How This Report Covers AI

- We do call out AI Capability inside the products we already review (e.g., Practice Management, Document Management, Intake/CRM, and—in some cases—Accounting).
- We don't rank generic AI apps here.
- We assume human review is required. AI is an accelerant, not an authority.

Overview of Artificial Intelligence

- **Machine Learning (ML)**: Systems that learn patterns from data (e.g., classifying documents, predicting next steps) rather than relying on hard-coded rules.
- **Generative AI**: Models that create content (text, summaries, suggestions). Helpful for first-drafts and distilling long materials.
- **Large Language Models (LLMs)**: Advanced generative models trained on vast text corpora. Useful for summarizing, drafting, classifying, and answering questions, but they still require verification.
- **ANI vs. AGI**: Today's legal software uses narrow AI (ANI)—specialized capabilities embedded in workflows. Speculation about general AI (AGI) isn't necessary to make practical gains now.

Where AI Shows Up Inside Legal Platforms

(Think embedded assistants and automations—not separate tools.)

Practice Management & Intake/CRM
• Drafting assists for routine emails, fee agreements, and follow-ups
• Matter timelines and summaries compiled from notes, events, and documents
• Suggested tasks/events and automated next steps from intake data
• Time-entry suggestions and richer billing narratives

Document Management (DMS)
• Natural-language search and "ask" interfaces over firm documents and emails
• Auto-classification, profiling suggestions, and smarter filing
• Fast summarization of long documents; comparison highlights and version context

Document Assembly & Templates
• Anomaly detection cues (e.g., duplicate charges, out-of-pattern transactions)
• Narrative improvements for invoices; reminder cadences for collections

Accounting & Trust
• Clause suggestions and first-draft generation based on firm templates and matter data
• Quality checks for missing fields or inconsistent facts

Knowledge & Operations
• Quick answers sourced from approved firm content (policies, how-to's, playbooks)
• Drafting internal checklists and SOPs from prior work

Responsible Use (Policies That Keep You Safe)

• **Human-in-the-loop**: Require review and sign-off for any client-facing output.

• **Data governance**: Know where data lives, how it's used to train or improve models, and how access/retention are controlled.

• **Permissions & audit**: Keep AI inside systems that respect matter security, ethical walls, and audit trails.

• **Source checking**: Prefer features that cite or link back to underlying documents/emails.

• **Change management**: Provide quick-reference guides, approved use cases, and escalation paths.

Near Future

Expect broader "search-then-answer" (retrieval-augmented) features across your systems of record, plus finer admin controls (who can generate what, from where) and better logs. More everyday automations—e.g., converting meeting notes into tasks/events, cleaning up time descriptions—will ship as standard features.

Further Out

AI won't replace professional judgment, but it will keep compressing the time it takes to read, draft, classify, and route work. Firms that set simple guardrails, enable embedded assistants where available, and train teams to verify outputs will see the most lift with the least risk.

THE VERDICT:

Every firm needs an **AI posture**, not an AI shopping spree. Start with the tools you already own, enable the embedded features your platform provides, set verification rules, and iterate. In this report, each product's profile includes a brief **AI Capability** note so you can see, at a glance, how that platform incorporates AI today—and where it can responsibly save you time.

Appendix D:

Additional Resources

- Virtual Law Firm

- Best Legal Document Management Software

- Best Law Practice Management Software

- Best Legal Accounting Software

- Best Cloud Storage for Law Firms

- Email Management for Law Firms

- Managed IT Services for Law Firms

- Cybersecurity for Law Firms

- Managed Cloud Services for Law Firms

- ChatGPT for Law Firm Marketing: A Blueprint

- Law Firm Marketing: A Guide to Getting More Clients in 2025

- SEO for Lawyers: A Practical Guide to Long-Term Visibility and Growth

- PPC for Lawyers: A Guide to Getting Leads with Paid Search

- 10 Best Law Firm Websites That Nail Design, Trust, and Conversion