How Do I Choose? Selecting and Implementing Law Practice Technology
1. What are the goals of the organization that the technology is intended to meet?

2. Does your current system have the capability to meet the firm goals?
   - Yes, but only through integration with other applications or products.
   - Not sure. Get additional training on current system.
   - No

3. Set budget. Include factors such as need for tech support, consultant, training, migration costs.

4. Based on input from all potential users (attorneys, administrative and IT staff) compile a prioritized list of features/functions. (client management, secure communications & email, tasks & workflows, research & knowledge management, time & financial management, other integrations)

5. Determine if products/providers offer priority features/functions AND evaluate functionality of products and services by considering reviews of other users.
   - 5a. Two potential solutions have top five features/functions (from list)
   - 5b. Two solutions have positive recs or reviews from local or similarly structured orgs

6. Demo and trial of at least two products/services for all staff.

7. Use change management principles to plan successful implementation.
   - 7a. Maintain buy-in built during selection by asking for recommendations and identifying change agents with resilience.
   - 7b. Plan a Pilot Program, Roll Out, and Training
   - 7c. Make policy changes and develop new workflows to ensure efficiency.

www.techshow.com

#ABATECHSHOW
PLACES TO FIND INITIAL INFORMATION ON PRACTICE MANAGEMENT SOLUTIONS


• STATE BAR CONFERENCES & ABA TECHSHOW

• PRACTICE MANAGEMENT RELATED BLOGS
PLACES TO FIND INITIAL INFORMATION ON PRACTICE MANAGEMENT SOLUTIONS

• PRACTICE MANAGEMENT RELATED BLOG POST

ADVICE ON SELECTING A LAW PRACTICE MANAGEMENT SOLUTION

SOME FEATURES YOU MAY DESIRE

Features are often divided into functional categories: (1) client management; (2) secure communication and email functionality; (3) document storage, management and assembly (automation); (4) research and knowledge management; (5) tasks and workflows; (6) integration, and (7) time and financial management.

• INTUITIVE & CUSTOMIZED DASHBOARD
• ONBOARDING. MIGRATION ASSISTANCE
• APP or RESPONSIVE DESIGN
• KNOWLEDGE BASE AND SUPPORT
• CONFLICTS CHECK
• INTAKE FORMS
• WEBSITE DEVELOPMENT
• EMAIL
  • AUTOMATED TRANSFER TO MATTER
  • EMAIL CLIENT
  • SECURE
• TEXTING
• CLIENT PORTAL
• NATIVE DOCUMENT STORAGE (VS. DOCUMENT MANAGEMENT & KNOWLEDGE MANAGEMENT)
• DOCUMENT AUTOMATION
• WORKFLOW
• INTEGRATION OPTIONS
  • RESEARCH TOOL
  • OPERATIONAL ACCOUNTING
• MATTER BUDGET
• TIME AND BILLING
  • LEDES (LEGAL ELECTRONIC DATA EXCHANGE STANDARDS) & UTBMS (UNIFORM TASK BASED MANAGEMENT SYSTEM)
  • INVOICE CUSTOMIZATION
• ACCEPT CREDIT CARD PAYMENTS
• ROBUST TRUST ACCOUNTING
• REPORTS
INTUITIVE DASHBOARD
ON-BOARDING, MIGRATION ASSISTANCE, EXPORTING

One Price – All the Benefits
CosmoLex is a true total solution. You get Practice Management, Billing & Accounting in one login for one price (No QuickBooks™ Required).

$49/month per User
Billed annually or $59 month-to-month

All Accounts Include...

- Free Data Migration Assistance
- Free Login for External Accountant or Bookkeeper
- Free Law Firm Accounting Book
- Free Secure Client Portal
- Free Unlimited Support
- Free Unlimited Data Storage

Start your free 1-month trial
No Obligation. No Credit Card Required.

GET STARTED FOR FREE

www.techshow.com

New CosmoLex Features! (December 13, 2016)
Modified on: Tue, 27 Dec, 2016 at 10:16 AM

Release No: 4.5
Release Date: December 13, 2016

NEW FEATURES & ENHANCEMENTS

HISTORICAL FINANCIAL TRANSACTION MIGRATIONS FOR BUSINESS & CREDIT CARD ACCOUNTS
Efficiently import historical operating bank transactions from an Excel or CSV dataset. Incoming chart of accounts can be mapped with CosmoLex chart of accounts at one central place and applied to ALL the transactions being imported. Imported transactions’ bank clearance status can be preserved. Entire process is designed to migrate business accounting data from legacy systems or generic business accounting programs fast and accurate.

HISTORICAL FINANCIAL TRANSACTION MIGRATIONS FOR TRUST ACCOUNTS
Efficiently import historical trust bank transactions from an Excel or CSV dataset. Incoming matter/project names can be mapped with CosmoLex matters at one central place and applied to ALL the transactions being imported. Imported transactions’ bank clearance status can be preserved. Entire process is designed to migrate trust account data from legacy systems or generic business accounting programs fast and accurate.

EXPORT COSMOLEX DATA AS PDF/EXCEL OR CSV FORMATS
Throughout the application, “Export” button is added to quickly extract required information from CosmoLex in PDF, Excel or CSV formats.

From your tech software, it saves precious valuable time on how to close your financial books and ensure starting balances properly. CosmoLex has migrated hundreds of law firms; we will work with you on a data migration plan that fits your unique requirements. If you have a large firm or more complex situation, you can get additional help from one of the dozens of CosmoLex Certified Consultants located throughout the country.

BEYOND SQUARE one
APP OR RESPONSIVE DESIGN

LEAP
Darla Jackson
Jul 13, 2017, 10:45 AM
Matters
Cards
Staff

MORE
Help & Support
Feedback
Settings
What's New
Sign Out

www.techshow.com

ROCKET MATTER

ZOLA SUITE

www.techshow.com #ABATECHSHOW
KNOWLEDGE BASE AND SUPPORT

- Support Center
  - Knowledge Base
    - Here you can view detailed how-to articles as well as submit a ticket to our support team.
  - Training Videos
    - Take a look at our video library to help you learn all of the latest CosmoLex functions.
  - Training Schedule
    - We offer free training. View our class schedule and select the date that works best for you.
  - Monthly Webinars
    - Register for an upcoming webinar or view our previous recordings here.
  - Leave a Review
    - How has CosmoLex been helpful to you and your firm? Fill out a review and let us know!
  - Feature Request
    - Have an idea for a new feature? Submit your request online here.
  - Users Forum
    - For sneak peeks, contests, and discussions, join our CosmoLex community.
  - Certified Consultants
    - Need some consulting or accounting help? Reach out to one of our certified consultants.
  - CosmoLex Services
    - CosmoLex Services shares our dedication to serving the unique needs of law firms.

- Knowledge Base
  - LOOKING FOR SOMETHING?
  - SUBMIT A TICKET
  - Please select a category:
    - Data Migration
    - Matters & Contacts
    - Billing
    - Banking
    - Accounting
    - Calendar
    - Tasks/Workflow
    - Documents
    - Emails & Communication
    - Client Portal
GETTING STARTED
If this is your first time using MyCase, here is a great place to start.
MyCase Quick Start Guide
MyCase 101 - Linking Contacts to Cases
Getting comfortable with the MyCase layout
How do I share information with Clients and Contacts?
Join a complimentary MyCase training!
What if I need help with something?

HELP ARTICLES
ACCOUNT SETUP
CASES
CLIENTS / CLIENT PORTAL

Chat with an Agent Now!
KNOWLEDGE BASE AND SUPPORT
INTAKE FORMS

- CLIO INTEGRATES WITH INTAKE123 or LEXICATA

Intake123

Convert more web visitors and initial consults to clients by making the best possible first impression. Intake123’s design-your-own drag-and-drop online form designer (with thousands of Standard Questions, Section Templates, and Form Templates for dozens of practice areas) eliminates the need for custom programming to make and update online intake forms.

Lexicata

Lexicata is the only cloud-based CRM and client intake system designed exclusively for small law firms. It brings each step of the client intake process online to reduce data entry and increase efficiency.
INTAKE FORMS

PRACTICE PANTHER

https://support.practicepanther.com/client-intake-forms/getting-started/intake-form-tutorial-video
CONFLICTS CHECK
CONFLICTS CHECK

How to run a Conflict Check

Users can now perform a comprehensive conflict check prior to taking on a case. This is a full-fledged search throughout the system that returns all conflicts with this is everything that is relevant. The results can also be exported in a csv format.

1. **Click "Tools"**

2. **Click "Conflict Check"**

3. **Insert your search criteria in "Search Terms" and click "Add To Search"**
CONFLICTS CHECK

What does the Search bar at the top of the page do?

The universal search will look throughout Zola for entries that match your search. You can use this as a search tool, or as a conflict check for your cases.

For example, searching "Huell" will pull up all entries in Zola that contain "Huell".

1. Use the top left search bar and search for any name or keyword. Press enter.

2. This will search through the entire software in one click. You can search through all your internal notes, tasks, events, emails, contacts, matters, and even custom fields!
NATIVE DOCUMENT STORAGE

• DOCUMENT STORAGE VS. Document MANAGEMENT
  • DOCUMENT STORAGE – Accessible VIA UPLOAD AND DOWNLOAD – IS AVAILABLE IN MOST Practice management solutions
  • DOCUMENT MANAGEMENT – ACCESSIBLE via checkout; Also Provides Versioning - IS NOT Available in most practice management solutions (Netdocument, Worldox)
  • Even though NATIVE DOCUMENT STORAGE IS PROVIDED, MANY SOLUTIONS ALSO ENCOURAGE USE OF BOX OR DROPBOX AND PROVIDE SYNC FUNCTIONS
NATIVE DOCUMENT STORAGE

• DOCUMENT STORAGE VS. Document MANAGEMENT
  • Even though NATIVE DOCUMENT STORAGE IS PROVIDED, MANY SOLUTIONS ALSO ENCOURGE USE OF BOX OR DROPBOX AND PROVIDE SYNC FUNCTIONS
In re the Marriage of
{ MERGEFIELD PETITIONER__Full_name },
   Petitioner,
and
{ MERGEFIELD RESPONDENT__Full_name },
   Respondent.

COMES NOW the Petitioner, { MERGEFIELD PETITIONER__Full_name },
alleges and states that:
{ LISTNUM LegalDefault \l 1 } Petitioner is now
MERGEFIELD PETITIONER__Address_County } County, f
{ LISTNUM LegalDefault \l 1 } The parties were
MARRIAGE DETAIL__State_of_marriage }, and have been s
Document Automation Tutorial (video)

Please watch this video about using and setting up document templates:

How to create a Document Template

Document Templates are used to create custom documents in Rocket Matter. Templates are created as Word documents and populated with either standard Rocket Matter 'document mergefields', or with custom Rocket Matter 'document mergefields'. Rocket Matter document mergefield tests can be downloaded from the Admin section.

1. Navigate to your Admin section, and click “Document Templates”.

http://rocketmatter.screenstepslive.com/s/1166/m/54811/l/509111-how-to-create-a-document-template
Please watch this video:

https://support.practicepanther.com/tasks-and-workflows/getting-started/automated-task-workflows-video
WORKFLOW

https://www.cosmolex.com/support/training-videos/?video=creating-a-Workflow
MATTER TEMPLATE (INCLUDES A WORKFLOW BY ANY OTHER NAME)
WORKFLOW

• TASK LIST IN CLIO

https://support.clio.com/hc/en-us/articles/228462128-Video-Tasks-Workflow
Zola Suite Adds Registered Email Capability #ABATECHSHOW

by Robert Ambrogi

A series of short posts rounding up product announcements from last week's ABA Techshow.

Zola Suite announced an integration with RPost to provide secure and certified email communications from within the Zola practice management platform. The integration provides tracking of email opens, certified proof of delivery, email encryption, and e-signatures.

"With the click of a button, attorneys can now send encrypted emails without leaving Zola Suite and access court-admissible proof of email content delivered, time-stamped and recorded automatically with its associated client matter," said Fred Cohen, Zola’s CEO.

http://www.lawsitesblog.com/2017/03/zola-suite-adds-registered-email-capability-abatechshow.html
EMAIL

- ALLOWS FORWARDING FROM ANOTHER EMAIL CLIENT TO COSMOLEX AND AUTOMATIC TAGGING TO A MATTER BASED ON SYSTEM RECOGNITION
Send your emails to PracticePanther with MailSync

Using MailSync to send emails to PracticePanther.

Written by David S
Updated over a week ago

Mailsync is the fastest way to store your emails directly in their respective contacts or matters in PracticePanther. It works through mail forwarding- in other words: every contact, and every matter have their own unique email (forwarding) address.

Please watch this video or follow the steps below:
Texting for your *existing* business phone number

Connect with customers, drive more engagement, and get your time back with Zipwhip's landline texting software.

[How It Works](https://www.zipwhip.com/)

[Request Free Trial](https://www.zipwhip.com/)

Zipwhip for Clio CRM integration provides peace of mind to customers in the legal space by maintaining client SMS and MMS conversations from Zipwhip within the CRM space for tracking and retention.
TEXTING

Text-to-Case-File
Text messages are how more and more clients prefer to communicate. Try our texting solution today and see how it can transform your firm.

Keep clients happy, preserve your privacy.

Your clients want to text, and you want to let them have access to you, but there’s a problem or two:
• You don’t have time to handle every single issue.
• You forget about a message on the phone and it falls through the cracks.
• You want to preserve your privacy and the line between work and personal life.

http://filevine.com/features/text-to-case-file/
TIME & BILLING

• CosmoLex - Events, tasks, notes, and emails when created, should be marked as billable. In CosmoLex Money Finder searches for items that have been marked as billable but not billed.

http://kb.cosmolex.com/support/solutions/articles/19000028612-how-to-add-time-cards-from-various-completed-activities-events-tasks-emails-notes-
MATTER BUDGET

- CLIO MATTER BUDGET IS AVAILABLE TO ELITE PLAN USERS
MATTER BUDGET

In RocketMatter

Edit Matter

Required Fields

Client *
Betty Wayne

Matter Name *
Wayne v. Wayne

Status
Open 06/16/2016

Statute of Limitations
Does not expire

Billing Method
- Flat Fee

Email Folder
- Not configured for email integration

Who can view this matter?
- Everyone

Additional Fields

Payment Processing Fees
- Option to enable

Matter Invoice Template
- Default

Interest
- None

Convenience Fee
- Eject
# CLIENT PORTAL – ROCKET MATTER

- **Email:** darlaj@okbar.org

## Calendar Events

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Matter</th>
<th>Owner</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Documents

- **File:** Electronic_discovery.pdf
  - **Date:** Feb 13, 2017
  - **Owner:** Darla Jackson

## Billing

- **Balance Due:** $0.00

## Your Info

- **Title:** Scott Jackson
- **Phones And Fax:** Mobile: 4059231915
- **Home Address:** 2080 High Dr., Moore, OK 73160, United States
Payment is through CLIO PAYMENTS, which is powered by LawPay.
CLIENT PORTAL – MYCASE
CLIENT PORTAL – FIRM CENTRAL
CLIENT PORTAL - COSMOLEX

Pending Invoices

<table>
<thead>
<tr>
<th>INVOICE NUMBER</th>
<th>DUE DATE</th>
<th>INVOICE AMOUNT</th>
<th>INVOICE BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>02/10/2017</td>
<td>20.00</td>
<td>20.00</td>
</tr>
</tbody>
</table>

You do not have any pending tasks

Upcoming Events

<table>
<thead>
<tr>
<th>START DATE</th>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>2:00 - 2:45</td>
<td>Meeting With Client</td>
<td>Darla Jackson's Office</td>
</tr>
</tbody>
</table>
ACCEPT CREDIT CARD PAYMENTS

• INTEGRATION WITH LAWPAY
ACCEPPT CREDIT CARD PAYMENTS

• CLIO PAYMENTS POWERED BY LAWPAY

About Clio Payments

Clio Payments gives you the ability to dramatically improve your cash flow position and reduce debt by removing the time delay between when you issue an invoice and receive payment.

Credit card processing capabilities allow for secure payments to be made without leaving Clio. No need to visit a external service, interact with a physical device, or manage an integration. In addition, clients can pay bills anywhere they have Internet access.

This, coupled with new email-based invoicing capabilities, allows you to send an email directly from Clio, with a copy of the bill and a secure payment link. The secure link offers your clients the ability to pay the bill on their own.

Signing up for Clio Payments - without an Existing LawPay Account

To set up Clio Payments without an existing LawPay account, go to your Clio Settings panel and click "Online Payments" in the Clio Settings column.

In the "Choose your Payment Account Provider" dropdown field, select "Clio Payments". You will then be provided with additional options. Click the "Sign up for Clio Payments" button.

https://support.clio.com/hc/en-us/articles/213124197-Clio-Payments-Set-Up

www.techshow.com
INTEGRATIONS

Pro: Allows you to continue to use familiar programs along with CLIO

Con: Cost – Paying for CLIO as well as other software

https://www.clio.com/features/integrations/

www.techshow.com
INTEGRATIONS

1. Upload your emails from Outlook on a Mac or PC directly into a matter.
2. Upload your documents directly to Rocket Matter from within Word, Excel, and PowerPoint.
3. Track your calendars as you normally do in Outlook and sync them effortlessly with Rocket Matter.
   - Allows you to keep track of your calendar events inside your matters.
   - Your Rocket Matter calendar appointments can be funneled automatically to your invoices. No time capture needed!

INTEGRATIONS

LEAP's Legal Software Integrations

LEAP has extra features and legal software solutions that integrate seamlessly to provide everything you need to run your small law firm and make more money!

- Helping law firms attract new clients
  - zelet
  - Learn More

- Online document management for your clients
  - LawConnect
  - Learn More

- Increase efficiency & keep up with disbursements
  - InfoTrack
  - Learn More

- Online appointment booking system
  - Lawtap
  - Learn More

- Leading cloud accounting software
  - QuickBooks
  - Learn More

- Increase efficiency with team collaboration
  - Office 365
  - Learn More

https://www.leap.us/features/legal-software-integrations/
INTEGRATIONS

3rd Party Integrations

Document Integrations (3)
- How to Sync Your Document Storage with Dropbox and Box
- Guidelines for Document Storage Integration
- How to Sync your Document Storage with OneDrive & OneDrive Business

Calendar Integrations (3)
- How to Sync your CosmoLex Calendar with your Google Calendar
- How to Unlink Your Google Calendar from CosmoLex
- How to Sync Your Cosmolex Calendar with Office 365 Calendar

Email Integrations (4)
- Configuring Email Integration With Gmail
- Configuring Email Integration With Outlook
- Configuring Email Integration With Apple Mail
- Configuring Email Integration With Yahoo Mail

Other Integrations (3)
- How to Set Up Your LawPay Integration
- How to Set Up Your Casemaker Integration
- How to Set Up Your Chrometa Integration
Centerbase Practice Management Adds Integration With NetDocuments

by Robert Ambrogi

MAY 26, 2017

Time for a practice management upgrade?

All of the flexibility and functionality your server-based practice management software offered is now available in the cloud.

For some time now, I've been meaning to write about Centerbase, a relatively new entrant to the law practice management space. Targeted at small- and mid-sized firms, Centerbase is unique for the high degree of configurability available to its users. As its website says, "We make Centerbase's features conform to your needs, not the other way around."
INTEGRATIONS

• QUICKBOOKS – FOR OPERATIONAL ACCOUNTING: CLIO, PRACTICEPANTHER
• NO INTEGRATION FOR OPERATIONAL ACCOUNTING BECAUSE NATIVE FEATURES – ACTIONSTEP, CENTERBASE, COSMOLEX
TRUST ACCOUNTING

- COSMOLEX
- ZOLA SUITE
- TRUSTBOOKS – STANDALONE – CLIO INTEGRATION COMING SOON

https://www.trustbooks.com/

TRUST ACCOUNTING PRODUCTS:
A Necessity for Your Lawyer Toolkit

By Darla Jackson, CBA Management Editor

Many attorneys face challenges when it comes to performing the account-
ing task necessary to properly maintain a trust account. Within the profession, there is an increasing number of attorneys, paralegals, and others who are either new to the practice or returning to practice after years of being away from the field.

Nationally, there are many software options available to attorneys who manage trust accounts. These software options can be divided into two categories: trust accounting software and trust accounting software integrated with a legal accounting system. Trust accounting software is designed specifically for trust accounting, while trust accounting software integrated with a legal accounting system allows attorneys to manage both trust accounts and client accounts within the same software.

Trust accounting software is a necessity for attorneys who manage trust accounts. However, attorneys should be aware of the limitations and risks associated with trust accounting software.

Here are some limitations of trust accounting software:

1. Limited reporting features:

   Trust accounting software may not provide detailed reports on trust account transactions, making it difficult for attorneys to track their clients' funds accurately.

2. Lack of integration:

   Trust accounting software may not integrate with other software used by attorneys, such as billing and time tracking systems, increasing the risk of errors and inefficiencies.

3. Security concerns:

   Trust accounting software may not provide robust security measures to protect client funds, making it vulnerable to hacking and fraud.

4. Compliance issues:

   Trust accounting software may not comply with the rules and regulations governing trust accounts, increasing the risk of legal and financial penalties.

5. Limited functionality:

   Trust accounting software may not provide the necessary features to properly manage trust accounts, such as custom reporting, automatically generated bank statements, and automatic reconciliations.

Despite these limitations, trust accounting software can be beneficial for attorneys who manage trust accounts. Attorneys should carefully evaluate the features and capabilities of trust accounting software before selecting a program.

Conclusion:

Trust accounting software is a necessity for attorneys who manage trust accounts. However, attorneys should be aware of the limitations and risks associated with trust accounting software. By carefully evaluating the features and capabilities of trust accounting software, attorneys can select a program that meets their needs and helps them manage trust accounts effectively.

https://works.bepress.com/darla_jackson/30/
Modernize your law firm for one simple, affordable price.

$39
Per user/month

Select the number of users:

2

Monthly Plan

$78/month
Billed month-to-month

https://www.mycase.com/pricing
COST

One price that pays for itself.

$49/month per user, billed annually (or $59 month-to-month) + ZERO setup, training, or migration cost + FREE future upgrades

Start automating your firm with a 7-day free trial.

https://www.practicepanther.com/pricing/
COST

https://www.cosmolex.com/pricing/
COST

Try the world's most powerful law practice management software for free.

$55/User per Month
Billed annually or $55 month-to-month

- Enjoy Unlimited Award-Winning Support
  Rocket Matter is the only legal software company to win customer service awards in consecutive years. Our friendly U.S.-based support team will get you started with our product and will always be ready to answer any question you might have.

- Take Advantage of Free Training
  Our friendly support team also offers unlimited training as well as multiple live online training sessions every week.

- Migrate Your Data with Ease
  Our staff will help you every step of the way as you migrate all of your important data into Rocket Matter. We'll make sure you're up and running quickly.

- Integrate with Your Favorite Apps
  Rocket Matter integrates with many popular third-party applications such as Office 365, Evernote, Dropbox, ScanSnap Cloud, and more.

## COST

<table>
<thead>
<tr>
<th></th>
<th>SOLO ACCOUNTS</th>
<th>FIRMS WITH 2 OR MORE USERS</th>
<th>FIRMS WITH 10 OR MORE USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>$49/mo</strong></td>
<td><strong>$58/mo</strong> Per Attorney</td>
<td>Contact us for discount pricing</td>
</tr>
<tr>
<td></td>
<td>When billed annually</td>
<td>When billed annually</td>
<td></td>
</tr>
<tr>
<td></td>
<td>or $599 month to month</td>
<td>or $68 month to month</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>$48/mo</strong> Per Non-Attorney Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>When billed annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>or $58 month to month</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[https://zolasuite.com/pricing/](https://zolasuite.com/pricing/)
Take Clio for a test drive.

No credit card required - all you need to get started is your email.

**Starter**
- The basics you need.
- $39 per user/month
- when billed annually or $49 month-to-month USD

Includes essential features such as:
- Case Management
- Hourly and Flat Fee Billing
- Custom Invoices
- Time Tracking
- Secure Client Portal: Clio Connect
- Task Management
- Mobile Apps for iPhone, iPad, and Android Devices

**Boutique**
- Take your practice to the next level.
- $59 per user/month
- when billed annually or $69 month-to-month USD

Includes all of basic features of Starter, plus this additional functionality:
- Accounting Integrations
- Integrated Credit Card Processor Clio Payments
- Custom Fields
- Advanced Document Automation
- Office 365 Business & Enterprise Integration
- Third Party Integrations
- Trust Requests
- Alternative Fee Billing
- Data Escrow

**Elite**
- Everything a firm could ask for.
- $99 per user/month
- when billed annually or $109 month-to-month USD

Includes all of Starter & Boutique functions, plus these advanced features:
- Court Calendaring Rules
- Matter Budgets
- Campaign Tracker
- Advanced Task Management
- Advanced Reporting
- Priority Support / Onboarding Training

https://www.clio.com/pricing/
Firm Central pricing
Choose the plan and pricing for Firm Central that suits your needs.

### CORE
$40 / user / month

**Features:**
- Client, matter, document, and task management
- Master-level calendar that syncs with Outlook and other web calendars
- Secure client portal
- Document indexing and KeyCite flag markups powered by Westlaw
- Custom forms automation
- Customizable homepage and matter and contact fields
- 24/7 customer support

### ESSENTIAL
$65 / user / month
with Time & Billing

**Features:**
- Includes all the features of the Core plan, plus:
  - Time & expense tracking
  - Custom invoicing
  - Trust accounting
  - Multiple billing rates and fee types
  - One-click invoicing

### PREMIER
$105 / user / month
with Time & Billing and Deadline Assistant

**Features:**
- Includes all the features of the Essential plan, plus:
  - Rules-based legal deadline calculation
  - Access to court rule authority on Westlaw
  - Automatic alerts and updates to court rules affecting your matters
  - Advanced deadline customization capabilities
  - Create custom events and rules sets
  - View legal deadlines in 3rd party calendars

**Free trial**

---

## Cost


<table>
<thead>
<tr>
<th><strong>LEAP</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Website</strong></td>
</tr>
<tr>
<td><strong>Starting Price</strong></td>
</tr>
<tr>
<td><strong>Installation</strong></td>
</tr>
<tr>
<td><strong>Apps</strong></td>
</tr>
</tbody>
</table>

---

**SUBSCRIBE**

Name *

First

Last

Email Address *

SUBSCRIBE
YOU play the most important part in keeping TECHSHOW exciting. *Please complete the Speaker evaluation before you leave.*

Reserve the dates!

TECHSHOW 2019: February 27 – March 2, 2019