

CMS Guide for Law Firms





Cloud CMS

This CMS is based in the "cloud". The "cloud" has advantages and disadvantages. On the plus side it requires little setup and is generally less prone to user errors when compared to a local CMS. You can also customize categories, workflow, and more to make it work perfectly for your particular practice area. The downside is that it requires a consistent internet connection. If you lose your internet connection in your office then you also lose your access to your CMS. Likewise if you are using the court's Wi-Fi. Another issue is the price. Your Cloud CMS will use a recurring subscription model, which means you are always paying for your software. If you ever want to stop you will have to move your database elsewhere.

Insightly.

Not attractive, but this CMS has most of your basics. It allows you to create a potential client into a contact, then opportunity, and onto a project once you have been retained. Pipelines, categories, forms, and other terms you've come to know in other CMS systems are here too.

- Customizable for your practice. Forms, pipelines, etc.
- Mobile. You can download the Insightly application to your smart phone/tablet. This means you can check and update your contacts, calendar, and more when away from a full fledge computer.
- Google Apps integration. If you use Google Apps, Gmail, Google Drive, etc. it can sync calendars, settings, etc.
- Price. Starter account is \$29 a month. Includes 6 users, 6GB of storage, and 25,000 contacts. Advance and Pro accounts are \$49 and \$99 respectively, and allow 6/15 users, 25GB/50GB of storage, and unlimited contacts.*

Batchbook.

Batchbook is very similar to Insightly. You have your contacts, opportunities, and project options. You can create forms, categories, and so on. It lags behind on a couple things, however.



- Customizable for your practice. Forms, pipelines, etc.
- Semi-Mobile. They haven't updated their old smart phone application, so you will have to access Batchbook from your phone's web browser instead. This can be slow and clunky.
- No Google Apps integration. If you don't use Google Apps though this won't be a big issue.
- Price. Accounts start at \$20 a month for unlimited users, 2,000 contacts, and 5GB of storage. \$50 for 10,000 Contacts and 15GB of storage. \$100 for 30,000 contacts and 30GB of storage.*

Amicus Cloud.

This CMS is different because it is made specifically for attorneys, though it's end results are still very similar to others. It will work a little quicker out of the box, but will still require customization for your firm. Its big selling point over the others is its ability to time capture and bill.

- Customizable for your practice. Forms, pipelines, etc.
- Semi-mobile in the same sense as Batchbook. You will be accessing it mobile from your browser.
- Time capture. You can track your time on projects within Amicus Cloud. You can even have it track time automatically for you. For example, every time you mark a billable task as done, or send an email to a client, it can do a time entry for you.
- Billing. You can send invoices directly from Amicus Cloud.
- Expensive. \$35 a month PER USER. Other CMSs allow multiple users for one account price, though Amicus Cloud doesn't mention any contact or data caps.*

Clio.

Like Amicus Cloud, Clio is also made with attorneys in mind. It delivers the basics along with calendaring, billing and productivity reports, time tracking, invoice creation, and more. It offers very deep customization with letter templates, so drafting commonly used documents will be a breeze.



- Customizable for your practice. Forms, pipelines, etc.
- Semi-mobile in the same sense as Batchbook and Amicus Cloud. You will be accessing it mobile from your browser.
- Time capture. You can track your time on projects within Clio and have them linked to relevant projects.
- Billing. You can send invoices directly from Clio.
- Document management. Clio shines above others by giving unlimited online storage. Similar in Dropbox in practice, you can share files with clients and firm employees. It also has a versioning system, so you can track each version of a document as it is updated.
- Outlook, Google Apps, and Dropbox syncing. Clio can communicate with all three, ensuring that your data syncs seamlessly.
- Price. \$49 a month for an Attorney account, \$25 a month per Support Staff account.*

MyCase

MyCase offers all of the basic features good CMS software should as well as several unique features. One stand out feature is the ability for clients to directly message you through the program instead of emailing, which capitalizes on security. Moreover, you can give them access to their own secure portal that allows them to view the progress of their matter in real-time saving you time from being on the phone and emailing them updates.

- Client Communication. Ability to interact with your clients through secure messaging and allow them to keep tabs on their case via progress updates.
- Time Tracking. Track the time you spend on each case from your computer or mobile device.
- QuickBooks Integration. You can easily sync you're My Case transactions with QuickBooks by purchasing a onetime \$99 plugin.
- Letter templates. You can create and manage custom documents and invoices that merge client data.
- Mobile. They offer apps for both iOS and Andriod devices for both attorneys and clients.



- Workflow. A customizable pipeline feature that automates your work process based on what kind of case or task your handling.
- 30 Day free trial. Then, \$39 per attorney/month and \$29 per paralegal/month.*

Rocket Matter

Rocket Matter has made a big name for itself through its clean, easy to use interface. Instead of overwhelming you with too many options, it has one main search bar that searches all of your content (contacts, companies, matter, etc). It offers integration with a number of leading companies such as Google calendar, Dropbox, Evernote and more. Perhaps most importantly for people who are just getting acquainted with this already intuitive software is their FAQ, support and tutorial resources. They have an extensive amount of support topics that cover virtually every aspect of their program as well as support on call.

- You can add billable time from almost any task, email, matter, calendar or timer window you happen to be on.
- Unlimited document storage is available for free and you can access them anywhere.
- Email integration is available with Google Mail as a two-way sync. However all other mail clients can only subscribe to the Rocket Matter calendar but not make any edits.
- Run reports. You are able to pull various types of information from different categories to run reports.
- Mobile. There is an app for iOS and Android.
- Price. There are discounted plans that will vary depending on the duration of your subscription. Monthly subscriptions that at \$65/month and Two-year plans go for \$52/month.*

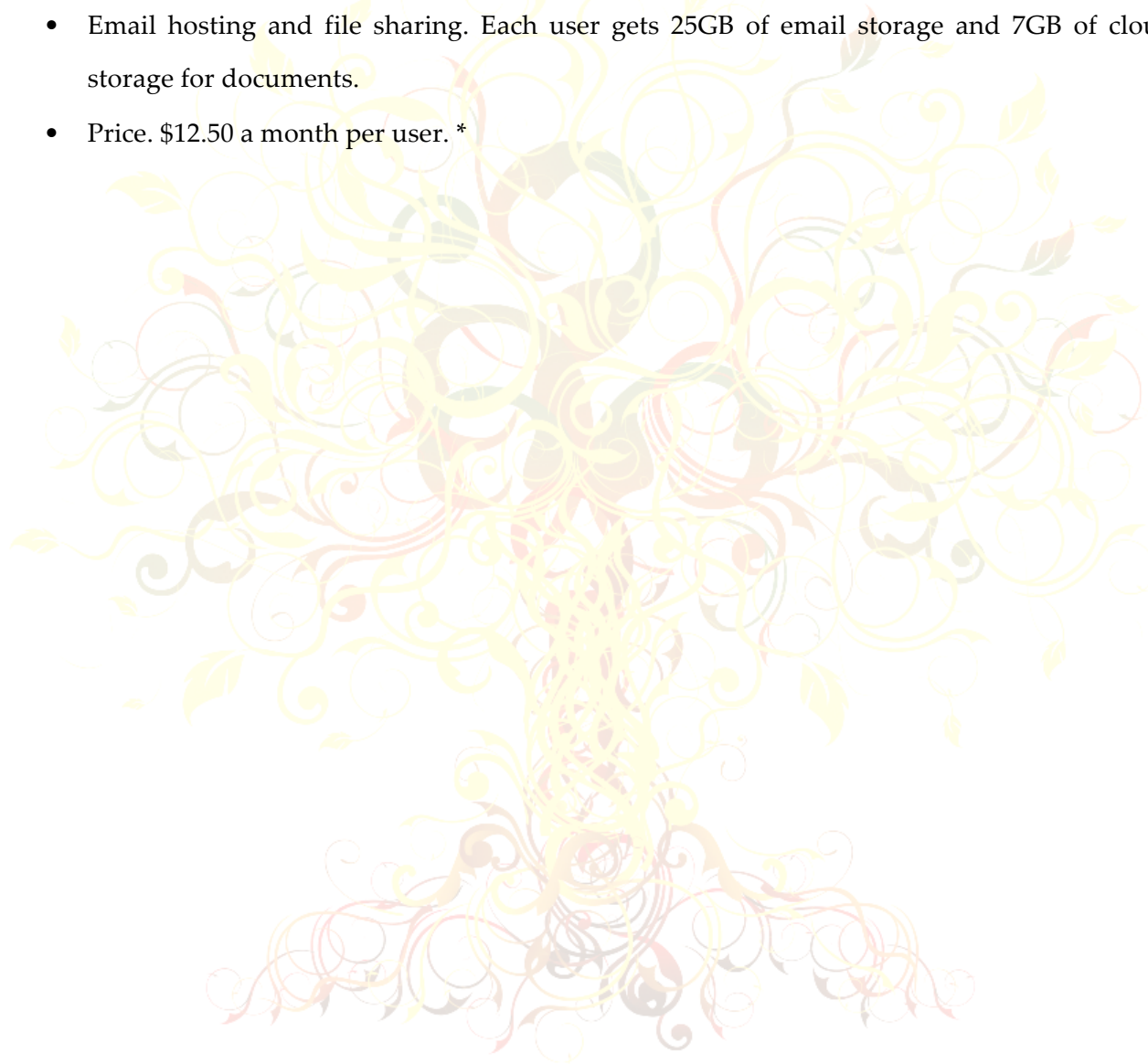
Office 365 for Business.

Office 365 for Business is a different approach to traditional CMSs. If you currently use Outlook for your basic CMS needs, and don't want to take the time to retrain for a new CMS, this



may be an acceptable alternative. You won't get streamlined features such as pipelines, forms, reports, etc.

- You receive a subscription to Microsoft Office for up to 5 PCs/Macs per user. This includes Microsoft Word, Excel, PowerPoint, Outlook, OneNote, Access, Publisher, and Lync.
- You can edit your Word, Excel, PowerPoint, and OneNote files via a web browser.
- Email hosting and file sharing. Each user gets 25GB of email storage and 7GB of cloud storage for documents.
- Price. \$12.50 a month per user. *





Desktop CMS

This type of CMS is stored locally in your firm. One specific computer acts as the "server", which should always be left on, which other computers and smart devices can feed off of. You typically have more customization options with these programs. Some Desktop CMSs let you save offline versions of the database so you can use it even if you don't have access to an internet connection. Additionally, they charge a one-time license fee. This means that you won't be billed forever for access to your database. There may be the occasional upgrade to be purchased, however.

Amicus Attorney Small Firm.

The local version of Amicus Cloud. It has everything Amicus Cloud and others do plus a little bit more. Despite being a desktop CMS, you can still access your database mobile through your smart phone's web browser. Just make sure the computer with your server remains on.

- Customizable for your practice. Forms, pipelines, etc.
- One time buy. No recurring fees.
- Semi-mobile. You will access your database from your smart device's web browser.
- Document integration. If you are, for example, working on a Word document, Amicus will let you link contact info, track time, and more to the document while inside of Word.
- Time capture and billing.
- Program integration. You can share your database information with other programs like Quickbooks, TimeSlips, PCLaw, and more.
- Price. \$499 for the first license, \$399 for each additional.*

PC Law.

Also made with law firms in mind. This is a close alternative to Amicus Attorney Small Firm, and your decision would likely come down to personal preference. PCLaw and Amicus Attorney both allow for a free trial.



- Customizable for your practice. Forms, pipelines, etc.
- One time buy. No recurring fees.
- Semi-mobile. You will access your database from your smart device's web browser.
- Time capture, integrated billing and accounting.
- Program integration. You can share your database information with other programs like Quickbooks and more.
- Expensive. \$985 for first license. Additional user price is not listed without having an existing PC Law account.*

Prophet.

Prophet is slightly different than other Desktop CMS programs because it ties directly into Outlook. With Prophet, Outlook can now manage sales opportunities, create reports, tasks, automated emails, workflow, and other basic CMS features that others offer. Prophet would be a good choice for firms that currently use Outlook, but are looking at giving it that extra boost to improve efficiency and organization.

- Improved contact and opportunity management over vanilla Outlook.
- Letter templates. You can create custom templates, forms, and records.
- Semi-mobile. You will access your database from your smart device's web browser.
- No time capture abilities.
- Price. For the Ultimate account, which includes the features listed above and more, does not have a price listed. You must contact them for a quote, and the price structure is a monthly charge unlike the other Desktop CMSs. The entry level Premium package costs \$20 a month, but doesn't have near the features as the Ultimate and would likely not satisfy most law firms.*

Daylite.

Daylite is different from other CMS software in that it is available only on Apple computers and devices. While this limits some firms based on their hardware, those firms on Apple devices



will instantly see the positive effects of this approach. Because of this exclusiveness, Daylite is able to focus its workflow, look, and abilities around the already familiar Mac operating system. This means that many of the actions in Daylite, and its compatibility with other Mac devices and software, are quickly picked up as second nature for any experienced Mac user. It also works very well in conjunction with its sister billing software, Billings Pro.

- Mac only. Mimics the same look, workflow, and general feel of the Mac environment.
- Letter templates. You can create custom templates, forms, and records.
- Mobile. Daylite has its own native iPhone app.
- Compatibility. You can import client projects into Daylite's sister billing software, Billings Pro. Also integrates well with the Apple Mail client.
- Price. Each license costs a one time fee of \$279.95 per user. While there may be charges for substantial version upgrades (i.e. Daylite 5), there is no general upgrade or maintenance cost beyond the initial license.*

Aderant Total Office.

Total Office uses Microsoft's framework, meaning it works seamlessly with Microsoft Office, allowing you to link information and saving time by not having to manually switch from your case management software to office.

- Windows Only. Built on Microsoft Office's framework.
- Fully integrated with Microsoft Outlook and Microsoft Office. Plug in support allows you to make appointments, create tasks and manage contacts from outlook. You can set up multiple outcomes, email notifications and automatic document assembly.
- Letter templates. You can create custom templates.
- No mobile app available.
- To-Do Packages. Essentially a pipeline feature where you can set up workflow templates for any given process and link tasks with Outlook.



- Reports. Can easily prepare and create reports for you.
- Made to be easily configured for different types of practices, low and high-volume.

TrialWorks and TrialWorks Hosted

TrialWorks offers an onsite program and a cloud-hosted program. The hosted version basically cuts the costs of buying server hardware, software, backup equipment, repairs, etc. Both versions are Windows based; however they offer apps for both Android and Apple devices. Similar to Aderant, it is built on Microsoft Office's platform, which allows for integration with all Microsoft Office programs. Its interface is like that of Outlook, Word and Excel, (Tab Format) which is immediately familiar for most of us.

- Windows Only. Built on Microsoft Office's framework.
- Similar environment as Microsoft Office makes for easy navigation and familiarity.
- You can track emails through the outlook plugin.
- Calendar and tasks let you track incident dates, trial dates, depositions, document due dates, and events.
- Overview tab shows upcoming tasks, calendar events, appointments and an activity summary.
- Made to be easily configured for multi-division or department law firms, low and high-volume.
- You can create custom document templates.



Document Managers

Worldox.

Worldox is the most widely used document manager system at the moment. It allows documents to be stored by matter/project, searching within files (such as PDFs), and deep categorization features. You are able to restrict and allow access to certain documents and matters on a per user basis. Additionally, there are plugins for virtually all Microsoft Office programs, allowing you to save your documents directly into their proper place in Worldox without having to leave Office. Lastly, Worldox is easily scalable with a variety of installation and upgrade options.

- Can store files on an existing firm server.
- Robust options for limiting what files and matters employees have access to.
- Ability to store files by matter.
- Supports out of office machines.
- \$425 per license plus a \$91 maintenance plan (required for the first year).*
- Non-server/Cloud storage version available (\$55/mo. per user).*

* We try to keep the prices and information in this document as updated as possible, but since the tech world is constantly evolving it's hard to keep up! Contact us if you have any questions about any software on or off this list.

the end.