



# LegalTech

## PUBLISHING

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# PRACTICE MANAGEMENT

## BUYERS GUIDE: 2021 EDITION



FILE STORAGE  
SOLUTIONS



OFFICE MANAGEMENT  
SOLUTIONS



SECURE CLOUD  
TRANSFER



CLIENT CONTACT  
ORGANIZATION

All the Tools You Need to Run and Grow Your Law Firm Including Case Management, Time and Billing, and Complete Accounting Operations That Can Run On-Premises or Securely In the Cloud

“AbacusLaw is an all-in-one legal practice management and accounting software platform that is deployed either on-premises, in a private cloud, or as a hosted application.”

#### Company Name Brands

Abacus Data Systems, Inc., DBA AbacusNext.

#### Product Name Brands

AbacusLaw  
Abacus Private Cloud (APC)  
Abacus Core Cloud (ACC)  
Amicus Cloud  
Amicus Attorney

#### Latest Developments and Updates

- Convert Microsoft Word documents to [automated HotDocs templates](#).
- Use [online interviews](#) to collect client information for customized business, marketing, and legal services.
- [Process](#) credit card payments and ACH transactions securely.
- Track time and create matters, contacts, and events in a [mobile app](#).

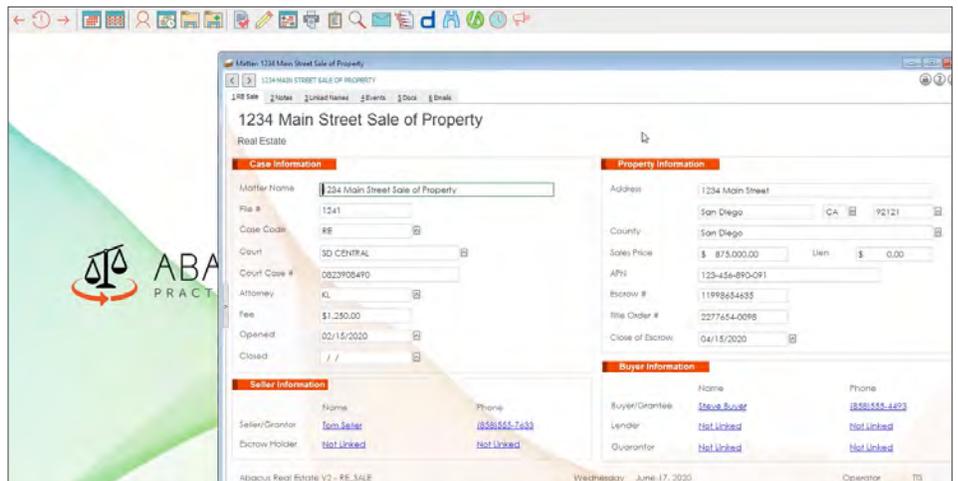
#### Introduction

Have you ever had a pivotal deadline fall through the cracks? How embarrassing was that experience? How confident are

you about capturing details regarding cases and clients so they don't get lost in the shuffle? Unfortunately, those things happen all the time to lawyers who overlook the proper management of their practice. Fortunately, it's easy to deploy a tool like AbacusLaw to ensure your firm functions like a well-oiled machine.

**AbacusLaw** is an all-in-one legal practice management and accounting software platform deployed either on-premises, in a private cloud, or as a hosted application. The comprehensive feature set includes a full accounting module, case management, shared calendars, court rules, document management and assembly, and billing and invoicing with Abacus Payment Exchange (APX).

Like most legal practice management applications, AbacusLaw is case and matter-centric. When you open a matter, the software keeps track of all details, contacts, appointments, and documents



The screenshot shows the AbacusLaw matter interface for a real estate case titled "1234 Main Street Sale of Property". The interface is organized into several tabs: Case Information, Property Information, Seller Information, and Buyer Information. The Case Information tab is active, displaying fields for Matter Name, File #, Case Code, Court, Court Case #, Attorney, Fee, Opened, and Closed. The Property Information tab shows Address, County, Sales Price, APN, Broker #, Title Order #, and Close of Escrow. The Seller Information tab lists Seller/Grantor and Escrow Holder. The Buyer Information tab lists Buyer/Grantee, Lender, and Guarantor. The interface includes a search bar, navigation icons, and a footer with the text "Abacus Real Estate V2 - RE\_SALE" and "Wednesday, June 17, 2020".

**Figure 1:** The AbacusLaw matter interface includes all the details of a case and its financial aspects in tabbed resources to manage client data including notes, calendar events, documents, issues, expenses, and email.

“ AbacusLaw has always had intake forms but, with HotDocs, you can turn the intake into an interview and make it available on a web page for a client to complete in a secure portal.”

associated with the matter. AbacusNext spotlights Practice Area Legal Solutions (PALS) designed for different types of practices where the packages provide specific automation rules, case input screens, documents, reports, forms, and terminology that are tailored for those particular needs.

The PALS guide you to capture the right information from clients for each case type. They can implement a standard operating procedure and set up and enforce rules-based calendars for court procedures and deadline-driven issues in order to accomplish client goals and successfully conclude matters. *See Figure 1 on the previous page.*

AbacusLaw builds its full-text search mechanism into all system components. You can search for content across all records or use filters for names, events, matters, notes, linked documents, and email messages. The company provides more than 200 standard reports on case management, profitability, and productivity. It also makes a custom reporting tool available in order to query and report on any values in the database.

#### **Intake, Workflows, and Time Tickets**

Out of the box, AbacusLaw has intake forms designed for many case types including

bankruptcy, criminal law, estate planning, family law, personal injury, and real estate. Those forms get you started in collecting the right information to apply rules-based calendars to matters, complete court forms accurately, comply with court deadlines and statutes of limitations, and much more.

The rules-based calendar system lets you know what tasks to do when. To make sure you stay on task, AbacusLaw includes workflow templates for multiple case types and allows you to edit, track, and manage all of them. It's also easy to create and automate a workflow using recorded events that trigger specific actions. For example, the system can remind you to request a signed document from a local government or federal agency before filing a lawsuit. From the workflow interface, a right-click easily marks a particular task complete.

With **Time Tickets**, you can capture all time spent on billable and non-billable tasks such as building forms, editing templates, and crafting email messages. Start a timer from the clock icon in the toolbar (the "Time Tix" button) and a dialog box opens to assign the ticket to a client and matter with activity and task-based codes.

You can tie rates to a Time Ticket and add tags such as "billable" and "non-billable." Time and billing functions work with

“AbacusNext has more than fifteen years of experience in combining practice management and accounting so you can easily manage, review, and report on your law firm's financial outlook.”

calendar events and contacts so you don't forget to add time for client meetings. You can right-click tasks, events, and other objects in AbacusLaw where you can easily record your time. See Figure 2.

**Document Automation and Flexible Forms**

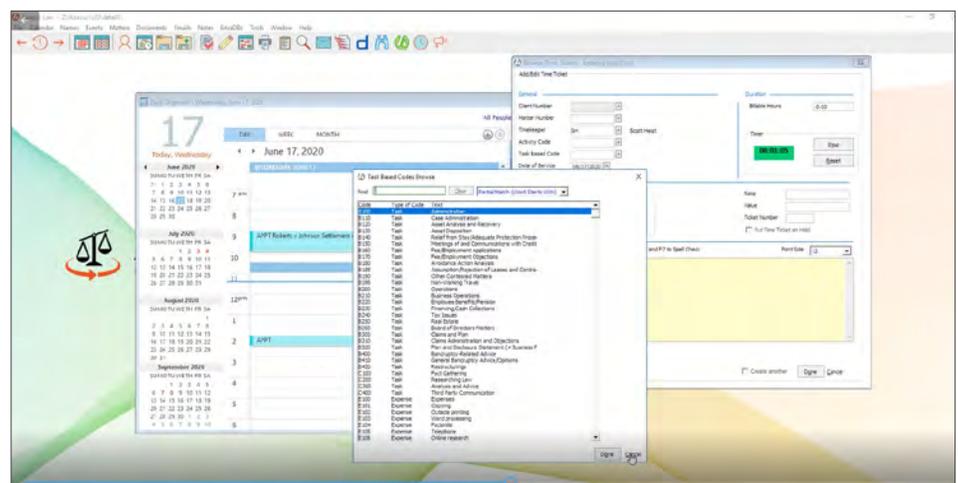
Like time management, you can create documents right from the AbacusLaw toolbar. The toolbar icons allow you to access a forms library or HotDocs to create documents and store them in the document management system (DMS). The DMS supports version control and check-in and out features. You can drag and drop documents from local and network drives into the DMS. When you add internet files from Dropbox, Microsoft OneDrive, or NetDocuments, a URL points to the document location. See Figure 3 on the next page.

The Abacus Forms Library contains forms

for case types, courts, and practice areas including bankruptcy, estate planning, family law, and immigration. Highlight a form and click the fill-form function to input client data from a case file. The other way to create content in AbacusLaw is through the HotDocs interview process.

When you access HotDocs from the toolbar, a dialog box of HotDocs forms opens so that you can select a template and fill it with client data from a matter file. The fill function pre-populates the interview process with client data. When you click "finish," AbacusLaw presents the HotDocs Advance template to continue the interview or data capture process and complete the output document for the client. The dialog box also lets you create or edit templates.

AbacusLaw has always had intake forms but, with HotDocs, you can turn the intake into an interview and make it available on a



**Figure 2:** You can trigger timers for tasks anywhere in AbacusLaw using the clock icon in the toolbar. Client data and timekeeper rates can prefill the Time Tickets (time entries) which allow input for notes and activity and task codes. After submission, the Time Tickets become financial events to manage, report, and bill in AbacusLaw Accounting.



The AbacusLaw software, whether on-premises or in the cloud, can be the firm's single source of truth for client data. AbacusNext tailors the onboarding process for the software to bring you up to speed quickly. With training and support, you can quickly create custom workflows, reports, and dashboards. The system uses graphical tools to customize the interface and workflows. It connects to Microsoft Office 365, creates a global address book for contacts, and synchronizes calendar events and tasks. The software includes Outlook and HotDocs Advance integrations, mobile apps for Apple iPhone and Google Android, and a native iPad app.

### Pricing

AbacusLaw starts at \$69 per seat per month for deployment on-premises including case management and accounting. The private cloud deployment

begins at a couple of hundred dollars per seat per month for all AbacusLaw features and the capability to provision law firm software in the cloud. The private cloud is well-suited for law firms with nine to a hundred or more users. If smaller firms want AbacusLaw in the cloud, the company hosts AbacusLaw in its Core Cloud offering at approximately the same per-user cost as the on-premises version.

### Who is AbacusNext?

AbacusNext is a technology provider for legal, accounting, and compliance professionals. Besides AbacusLaw, the company provides Amicus Attorney, Amicus Cloud, and HotDocs Advance to the legal industry. Founded in 1983, AbacusNext is a private San Diego, California-based company with offices in Toronto, Canada and Edinburgh, United Kingdom. The company's 300 employees,

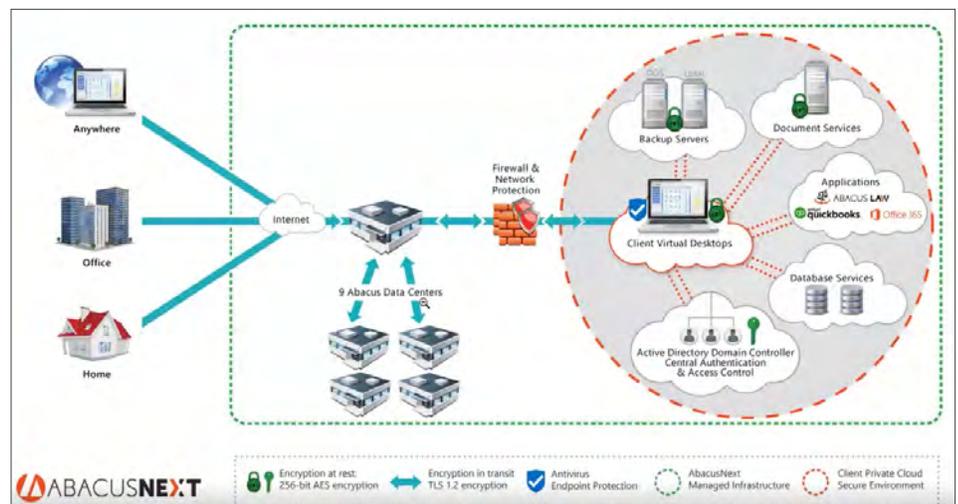
half of whom work in development and engineering, support more than 100,000 users across sixty countries. Private equity from Providence Equity Partners fuels the company's growth and acquisition.

### Why You Should Consider AbacusLaw

- Options to deploy AbacusLaw on-premises, in the cloud, or as a hybrid model.
- Manage all financial aspects of the firm and cases with AbacusNext Accounting and e-payment processing.
- Integrate with Microsoft Office 365, Outlook, and HotDocs Advance.
- Use the software outside the office on Google Android smartphones, Apple iPhones, and with a native iPad app.

### Contact AbacusLaw Today!

Contact Abacus for a [demo of AbacusLaw](#) to see how it can support your practice. ■



**Figure 4:** AbacusLaw deploys in a private cloud so that law firms can access the software and other resources in Microsoft Windows on a virtual desktop over RDP. Data is encrypted in transit and at rest and access to the software is secured with multifactor authentication and role-based permissions.

## Thank you for reading, let's keep in touch!

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