

# The New AbacusLaw-HotDocs Integration Autofills Client Data for Faster, More Accurate Document Creation

By Neil J. Squillante  
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The technology world has two integration philosophies — vertical first-party integrations and horizontal third-party integrations. Both have thrived but the latter typically exists only when the former doesn't. That's because integrations always work best when the same company makes both products and the integration itself. This is axiomatic.

## AbacusLaw in One Sentence

AbacusNext's AbacusLaw is practice management software (including accounting, billing, and document management) that now integrates with document automation powerhouse and sibling HotDocs.

## The Killer Feature

The new integration incorporates HotDocs into AbacusLaw. This eliminates application switching, reduces clicks, and most importantly enables you to autofill templates using client and matter data in AbacusLaw. If you're already a HotDocs customer, all your existing templates will work with the integration.

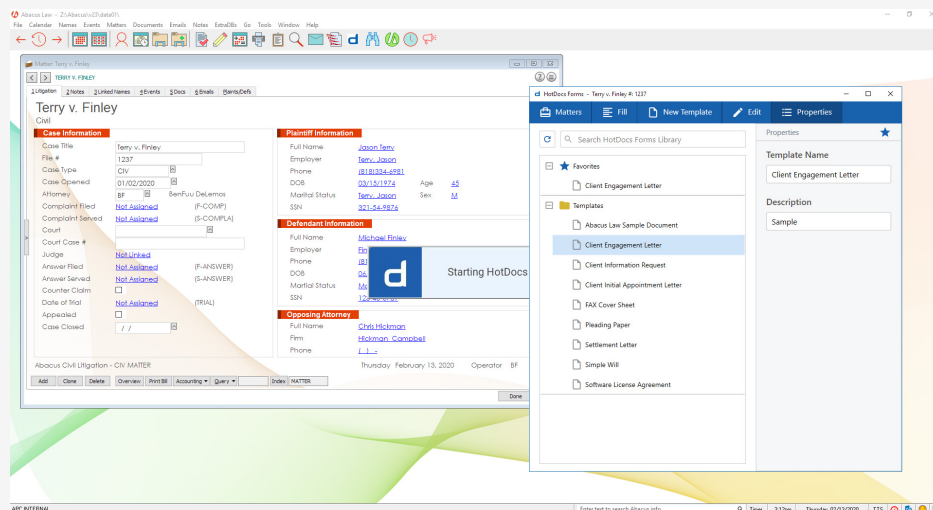
Clicking the new HotDocs icon in the AbacusLaw toolbar displays the HotDocs Forms Library with

three ways to find a template — enter a search, choose from a list of favorited templates, or browse. Click the Matters button to select the applicable matter if you're not already there, and then the Fill button to autofill the selected template with data from that matter.



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HotDocs templates appear as a multistep interview that runs inside AbacusLaw so you need not switch to a web browser. Interviews can contain logic that determines whether a document needs certain provisions. You can also have clients securely complete intake interviews. After auto-filling and/or entering data, the interview generates a Word or PDF document. AbacusLaw stores the document in the matter and can prompt you for a time entry.



The new AbacusLaw-HotDocs integration makes document creation faster.

From the HotDocs Forms Library, you can also create a new Template or edit an existing template. AbacusNext provides support for both products, including design experts who can help build your template library.



**The AbacusLaw Client Portal now supports time-saving rules. For example, you can automatically share approved bills, documents, changes in case status, and calendar events with clients. You can also communicate with clients through the portal.**

“The integration of AbacusLaw and HotDocs is significant as it delivers industry-leading document automation with our all-in-one legal practice management solution,” says Global Product Marketing Director Tomas Suros. “Firms can now work closely with their clients, even at distance, to capture pertinent information once, and then use it to assemble dynamic documents with limitless flexibility. Creating templates happens within the familiar confines of Word.”

## Other Notable Features

Since we last reported on AbacusLaw, it has added several other major new features.

The AbacusLaw Client Portal now supports time-saving rules. For example, you can automatically share approved bills, documents, changes in case status, and calendar events with clients. You can also communicate with clients through the portal. The built-in [Abacus Payment Exchange](#) payments platform — another first-party integration — enables clients to pay bills using their bank

account or credit card without the need for a third-party solution like LawPay.

Some third-party integrations are unavoidable such as with Microsoft 365. However, AbacusLaw has replaced its Outlook synchronization with a more modern direct integration with Exchange. Just enter your Microsoft credentials and your email and calendar synchronize across AbacusLaw, Outlook, and the AbacusLaw Android and iOS apps. Benefits include automatically connecting client-related email and file attachments to the correct matter, replying to saved email messages even if you were not a recipient, and receiving a prompt for a time entry after sending a message. The integration also prevents duplicate email in matters.

## What Else Should You Know?

Another first-party integration merits a mention. Most customers host AbacusLaw using [Abacus Private Cloud](#). Users at these firms can use AbacusLaw, HotDocs, Microsoft Office, and any other desktop or cloud application from the office, from home, or on the road.

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## Meet Neil J. Squillante

Neil J. Squillante is the founder and publisher of [TechnoLawyer](#), an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer newsletters the only ones they need. A Fastcase 50 award winner, Neil has a long track record of inventing successful advertising and publishing technologies and related best practices. Previously, Neil practiced commercial litigation at Am Law 100 firm Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University. At UCLA, Neil served as a Managing Editor of UCLA Law Review.



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## AUTOMATE YOUR DOCUMENTS

Schedule an online consultation to see the AbacusLaw-HotDocs integration in action.

**SCHEDULE DEMO**

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