

Popular Threads on Solosez

Still Confused about Practice Management Billing

Hi, everyone. I've read the archives, and followed some discussions here, and I still can't decide, or rather, figure out, what my best solution is for practice management/billing/bookkeeping software. Is there one product that will do it all? Or am I going to have to get at least two products? What works better - something web-based, or something on my machine?

I have a solo family law and mediation practice. The family law is all hourly; the mediation is flat rate. I have two accounts, an IOLTA and an operating account. I know nothing about accounting and precious little about technology. I need a "bread in, toast out" solution. I want to spend as little as possible, as I am determined to keep my overhead down. Right now I'm just keeping my bank accounts on Quicken, and using a combination of Excel spreadsheets and Word documents to track my expenses and billable hours. It's not working so well.

Can you please tell me what product, or combination of products, you use, and whether you're happy with them?

Try Lawstream

Paul Hogan

www.GoClio.com does it all for me right now! Practice management, billing, and most of my bookkeeping! I don't even get paid to say this -- but I love Clio.

-Brian Pedigo, California

I am having the same concerns regarding document management, billing, and time-keeping software. Please let me know if you get any great answers off list, I am very interested in suggestions. I looked into Clio as mentioned, and it sounds great, but I definitely want to avoid monthly costs and prefer buying something I will own to reduce overhead. Thanks.

Damaris G. Quijano, Texa

Once you compare all the costs of the separate products / solutions to an SAAS (software as a service) like Clio, you'll see there is not a huge difference in cost. For example, you might spend \$300 on Quickbooks Professional and \$300 on Office. Most likely, by next year, there will be new versions of the software requiring upgrades. You may need new hardware to support the new software. You will need a backup solution to keep your data safe and secure. You may need online access to your data from remote locations. Add up all the costs and you'll see that a SAAS solution like Clio, which does it all, is very comparable.

Best,

Brian Pedigo

IMHO, no small firm needs Quickbooks, we use Quicken, and have been using the same version for years, for about \$70. We have been using the same version of Word and its related products for 8 years. There is nothing wrong with Word 2003, and nothing better.

Practice management, we use TimeMatters. A bit pricier there, but worth every penny, IMHO. It took us a long time to get it stable (and the last problem was traced to a bad DNS server, not TM), but it is a great program.

Mark J. Astarita, New York

I dunno about the argument one way or another, but I do not believe Clio or Rocketmatter does accounting. You would still need Quickbooks. I don't believe that it is close regarding costs. You can still use office 2000 and get your work done. at my in house counsel position (an investmnet adviser not a law firm) they're still using Quickbooks 2005, and that model is more complex than a small law firm accounting wise.

About the backup. I'm sorry, but there is no way I'm relying on Clio or Rocketmatter for my backup. I need that stuff in house. I think that line of reasoning comes from my job, working for an SEC regulated company, our disaster recovery and business continuity plan would be ripped apart if we relied exclusively on a 3rd party for our data.

Joseph Dang, California

I would again suggest that the person who initially raised the question search the archives for the following:

"case management"

"practice management"

"document management"

"tabs 3"

"amicus attorney"

"time matters"

"timematters"

"practicemaster"

"SaaS"

"CLIO"

"Rocketmatter"

"VLOTtech"

"Quickbooks"

"Quicken"

"Worldox"

There have been many THOUSANDS of words contained in very, very valuable posts here, very current and very useful on this precise subject. It would be hard for us (and a lot of work) to restate it all.

As I have stated many times previous, I will not recommend a SaaS product of any type, for any purpose unless it has a very functional offline mode that lets me work with locally mirrored data if I don't have a high-speed internet connection. Just yesterday our TimeWarner high-speed cable at home was out for two hours - no explanation, just out. What if that had been the middle of workday - all my people would have been twiddling their thumbs, unable to really do any work at all. That's totally unacceptable. The beauty of large-scale SaaS like Gmail and Salesforce.com is that they DO have offline/local modes to use in such an emergency. And I GUARANTY you, while it may not happen often, when it you do lose your connectivity, or are just having a "bad net day" with a connection that is as slow as molasses, is at the WORST possible time.

In the near-term I'd settle for mirroring of the calendar with a local applet to instantly view it/print it, and mirroring of net-stored documents. To me, if those two functions can be accessed whether online or offline, I could live with it. But not until then (and I know Jack, Larry and Stephanie from CLIO, RocketMatter and VLOTech, respectively, are listening, and I know they know I'm right on this - kudos to Jack and the CLIO folks by taking the first step with the release of CLIO Express but I don't think it's critical to be able to enter time offline - that can wait until a net connection is restored. It's the inability to get to a calendar and one's documents that would bring a practice to a screeching halt . . .).

And it's not just losing your connection, what about being places where you can't get one at all? In my travels around the country, even with my Sprint broadband gizmo, sometimes I can't get a decent high-speed connection for the life of me ... small towns with crummy wi-fi, no nearby Sprint towers, and spotty high-speed connectivity from tiny local cable providers. While not the norm, it is sometimes the case. Also, for those using WiFi on their laptops in public hotspots (like hotels, public buildings, most cafes) remember that unless you have to enter a network key or passphrase of some sort, that's a TOTALLY UNSECURE connection and you are exposing confidential client, firm and personal information to easy interception!!

What we need is second generation legal SaaS practice management - with the maturity to include enough offline capability to make anyone feel comfortable that they have access to their most critical practice information 100% of the time, regardless of whether they are online or offline. Then I'll certainly include it in the range of options that I, as an independent practice management consultant, would consider recommending to my clients.

BUT, the key message here to our original inquirer is READ THE ARCHIVES!

OK, they could also read all of my case/practice management CLE materials at www.microlaw.com/cle-downloads.html, free and registration-less as always too <g>.

Ross Kodner, Wisconsin

As far as keeping track of income and expenses, Clio does that. It also allows you to set up your trust account so you can keep tabs on that too.

It's nowhere near as full-featured as Quicken/Quickbooks, but it gets the job done for me in keeping track of money related to my practice.

But Joseph is right about costs when you take the old software approach. You could use something like OpenOffice (free) and figure out some way to do

everything. You could also program your own practice management software from scratch. 😊 My cost comparison is to buying the latest and greatest software available to the SaaS model.

As for backup, I agree that you shouldn't rely on only an SaaS for your backup. I keep all my documents on my hard drive, back it up to external, and even pony up extra cash for Mozy. But all those critical documents are also on Clio, which are being backed up and accessible from anywhere. It's an extra layer of backup.

Brian Pedigo

Are either of you using ProDoc? <http://www.prodoc.com/texas/index.asp>

I have QuickBooks Premier for my accounting because it allows hourly/flat rates and works with my trust account, but most attorneys I know are using QB Pro which you can buy for much less. QB can generate invoices, but lately I've been using the SOS (\$25.

month add-on to my ProDoc's Office Practice Library \$ 120.) for billing as well as client information, documents, notes, etc.

Toni G. Warder, Texas

Ross:

I read all your tech posts, and on your recommendations, I have previewed and may purchase Practice Master, and I will have Worldox someday soon, so with great trepidation I will say I'm puzzled by the offline mode issue you've been regularly mentioning with regard to SaaS products.

My internet has been down maybe a handful of times in the last few years, counting home and office. And yes, I'm a nervous wreck when it happens because it's always been when I need to google song lyrics or check my Netflix account, but it's never down for very long. I still keep paper files so if I had to, I could walk into the other room and open the notebook to get what I need (phone numbers, pleadings, correspondence). When I travel, even the unfanciest motels have had adequate internet service. If I have hearing or a depo out of town, than the paper file is with me. I would never rely solely on my computer or a document on-line.

I've tested Clio, RocketMatter and Caseload (the cheapest of them), and I've seen other problems which make me hesitant to completely give up my 8 y/o version of Amicus Attorney. I'm leaning towards Practice Master and Tabs 3 because of the fixed expense and the case mgt and accounting combo. However, I am also liking Caseload because I imagine setting up these inexpensive accounts for use when I have co-counsel; Caseload would be a way for us to keep up with task mgt and communications, and view important documents.

I can't say I wouldn't use a SaaS product because I can't work on it offline. Have I just been lucky with my internet service?

And now I'm off to hunt Easter eggs with my kids in the freezing rain and snow. It's a cold day here in Santa Fe; hope others are having some warmer weather for this Easter and Passover holiday.

Lynn Barnhill, New Mexico

I use TABS III for billing, which comes with Practicemaster Basic for time management. I have used these programs since I started up 4 years ago. When I began, I used Quickbooks Pro for accounting, trust accounting, checkbooks, etc. Last year I migrated to the Trust Accounting module, Accounts Payable, and the General Ledger module. I am now off Quickbooks entirely. I made the move because my version of QB was a little buggy sometimes with the integration between it and TABS. Admittedly, I used a 2003 version, with Intuit stopped supporting in 05 or 06. I bought it new in the box for \$100 from a friend of mine, and that was cheaper at the time than the investment in the modules from STI.

However, because it was not fully integrated and could get a bit buggy, I found myself entering data into TABS, and then into QB. Upgrading to the latest version of QB was more expensive than investing in the add-on modules, which are absolutely seamless. It has made trust accounting and the disbursement of trust funds less of a headache. I had thought about migrating to something else, (but since I got off my high horse a couple of years ago and admitted the reason I thought about switching was because I hadn't read the manuals and didn't understand what I had), I would recommend TABS to anyone.

But others are similarly smitten with their choice of software, as evidenced by the other replies you've received. A friend of mine here in town, who has a criminal defense practice uses Outlook and Word to manage his practice, although I don't recall what he uses for the accounting/bookkeeping. A friend of mine uses Outlook and Timeslips, and all his word processing is on Wordperfect. The bottom line is that you use what works for you. Some, if not all of the big players, (TABS, Amicus, PC Law) offer trial downloads or demos.

Someone mentioned ProDocs. I used Prodocs for awhile, but not the Small Office Suite as I had already made the investment into TABS. I found Prodocs to be unnecessary for me because I had all the forms I'd ever need, pretty much, already. However, for someone just starting out (who hadn't invested \$\$ into software) or someone entering a new field of law (who needed forms), I'd certainly give Prodocs and SOS a fair test. I was impressed with Prodocs.

Barry Kaufman, Florida

Some of the answer is a personal tolerance issue. The last week of December I was without Internet connection for THREE days because 1) an idiot downstairs in my building decided to move the cable in his suite so he cut the cable and moved it, 2) Comcast got out too late in the day to get a second person to help rerun the cable, and 3) the cable guy couldn't get access to the scene of the crime because the server room in this security-sensitive company could only be accessed by two people and neither were in the office. I have my own server so we could work away but we were hobbled. So life does happen as was proved a week later when he cut the cable a second time.

Ross, and others, provide what they believe and have seen to be the best practices, but, like our clients, it is our part to figure out whether to follow the advice.

Deb Matthews, Virginia

I agree with Ross on the SaaS issue and only partly because of uncertainties in the Internet connection. In no particular order:

- * The month doesn't go by that I don't have a client suffer an Internet outage of some duration (anywhere from 10 minutes to several days) somewhere.
- * The providers themselves can have outages. Even Google, Yahoo! and Microsoft have suffered outages of their online offerings in recent weeks/months and they have a lot more resources than most of the vertical market SaaS vendors do.
- * I have serious concerns about information security when it comes to proprietary, mission-critical and/or confidential data. I'm not comfortable just handing that data over to a distant, anonymous, 3rd party, OR relying upon them to provide it to me. I would insist upon having a local copy of my data if for no other reason than so I wasn't at the mercy of that third-party company and their business practices.

The first generation of "SaaS" was called "ASP" (application service providers) and most of those vendors failed and went by the wayside. If you entrust your critical data to "GoodSaaS.com" and 5 months later they fail and go out of business, how do you get your data back?

SaaS can be a successful technology in your firm. I just think you need to be very careful about how much you put your practice (and your clients' confidential data) at the mercy of outside companies. (especially in an uncertain economy)

Ben M. Schorr

No PCLaw, Ross?

Scott I. Barer, California

I agree. Redtail Technologies, who is a pretty damn big CRM provider and has a lot of resources, went down for 6 hours last week during work hours. And they have redundancy, different sites, all that jazz. But they still went down, system wide. Lots of financial firms could not access their CRM for the day.

Joseph Dang

The Internet connection concern is alleviated completely if your cell phone can be tethered to your computer to act as a 3G modem (or if you already have a dedicated 3G PC card or USB modem), unless the problem is on the provider side which occurs very infrequently but is definitely a possibility. Windows Mobile and many Blackberry cell phones can do this easily, though there might be an additional charge from the carrier. However, my cell phone has saved me many times when I am at a place where I cannot get any wi-fi signal and I had to work on stuff on my laptop (or simply surf the web). Highly recommended.

Mikio Miyawaki

OK, but back to my original question:

Is there one solution that will do everything? It doesn't sound like it - it sounds like I'm going to have to come up with some combination of programs.

And not to be snotty, but I'm not really interested in the debate about what is "best" for someone else. Ross is right; there have been thousands of words written here about that. You all can argue all day about that if it makes you happy! 😊 I'm only interested in hearing what people who are similarly-situated to me (sole practitioner, some hourly and some flat fee work) are using, and if they like it.

TABS III/Practicemaster with modules from STI. I like it.

How's that?

Barry Kaufman