

Cloud-Based Client Management Software

An October 2010 discussion on SoloSez, the email listserv for general practice, solo and small firm lawyers

I'm looking for a web based client management software and came across pbworks.com. Anyone using it? Any other suggestions? I need to be able to create a separate secure portal for each client.

That's why I love this listserv. I get so many ideas!

Anyway, in response to your posting, I have been using <http://insight.ly/> with absolutely NO kinks. I am very impressed with the software.

-Rob

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Robert Z. Cashman, Texas

That does look like a great program (but I will need to check the security). I think I have experimented with just about every client portal - box.net, basecampHQ, zoho, huddle, drop.io (not really a portal per se) - I used pbworks early on as a wiki, but have not looked more closely at the other offerings. I just can't seem to decide on what works best but since I use google apps this looks promising.

Carolyn Elefant, Washington, D.C.

I'm not sure if you've tried Clio, but Clio allows you to share documents with other people through the ClientConnect option. You just upload the document to the matter, and select the contact(s) you want to share the document with. Clio then sends them an email letting them know and provides a ClientConnect link. If the client is not registered, they will then register and have access to all documents you share with them.

I don't use it often, but I have when I need to get a draft of something to a client. It's easier for them to connect and download, rather than me trying to email a huge PDF, or wasting the paper by printing out for them when the document is a first draft anyway.

Matthew Murillo

I use Clio and I have no complaints.

Paul "Woody" Scott

I wrote a blog post yesterday that lists and links to a number of cloud-based software for client management and for general practice management: <http://alturl.com/fh6yx>

Stephanie L. Kimbro

You forgot Quickbooks Online for the invoicing/billing section.

Matthew Murillo, California