Practice Panther

Anybody using Practice Panther? Clio involuntarily upgraded me and I am looking at alternatives.

Checking in from the 06443; I a Panther-player too.

I had been at another firm with Rocket Matter. I like the ability to have Custom Work Flows and Letter Templates.

I am sure there is a ton I am missing out on.

I'm happy with it.

Michael Sweeney, Connecticut

I did a quick review of their website. I saw mention (only once) of PracticePanther being free for life for a "true solo". Is that correct? Is there a limit to the number of cases a "true solo" can have?

Also, do you use box.com or Dropbox for your data storage? Any chance it works with OneDrive?

John Varde, Illinois

Yes. Switched to them from Clio about 2 months ago. Found them to be a massive improvement.

Ken Forman, Florida

I've used both PP and Clio, and for the value, I would go with PP. Ask around here for a referral link you get a discount for signing up.

Dan X. Nguyen, California

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3 cases.

https://support.practicepanther.com/getting-started/billing-and-subscription/is-there-a-free-version-for-starting-solo-practitioners

I'm also wondering if they work with OneDrive.

Joseph D. Dang, California

I used a few practice management software(s?) before settling on Practice Panther. I've now been with them about 2 years and absolutely love it. I've found their customer service to be extremely responsive - you get real people every time who are willing to spend however much time is needed to figure out how to do what you want to do. I really like their integrations

- I only recently started using Box.com and find that with that plus my google calendar integrated I really never need to leave the PP system. I send secure messages to my clients, take notes, log phone calls, time, etc. all within PP.

You can also create templates, setup intakes (which you can integrate with your website for auto-population of client info), and set up workflows. One thing I just learned, too, is that you can assign tasks to your clients -- I absolutely love that feature as I now never again have to listen to a client say "I didn't know I had to do that!" (jokes - I still hear that always).

Not sure what specific features you are looking for or need, but I'm happy to answer any questions you might have about PP. I don't work for them or benefit in any way, I'm just a nerd who happens to think that what they've done at PP is pretty cool and the fact that it makes my life A LOT easier makes me happy to be their very unofficial spokesperson.

(Would love to get in on that "free for life" deal for true solos, if they actually have it. As far as I know, even if you're solo you pay - I sure do)

Shlomo Himmel

Edit to my previous post: They don't work with OneDrive or google drive at present. I was told they are working on a gdrive extension. From their FAQ:

We currently don't offer a file storage integration for Google Drive or

> OneDrive, as their APIs don't offer the same flexibility as Box or DropBox.

> For example: Box and Dropbox allow you to share, upload, download,

> etc. all from within PracticePanther. No need for additional windows or tabs!

Shlomo Himmel

So the concept of "free for life" for a solo only applies if you have essentially no business? Seems like it's bordering on a scam concept. I wonder why they bother with something so useless. Not a good introduction to the company, as far as I'm concerned.

John Varde

Agree with John... "FREE FOR LIFE!!!! ....as long as you only have 3 clients/cases at any one time, anyway." = bait-and-switch

Seth Combs, Kentucky

Just checked it out. Pretty cool looking, but their document assembly looks very primitive. Unless they're hiding features, you can't fill it out with many fields.

Joseph D. Dang

I have about 70 templates populated with 50+ custom fields.

Suzanne L. Hawkins, South Carolina

That can populate a form in document assembly?

Joseph D. Dang

Are these templates Word documents which have been converted to templates, or do they have their own word processing & template/assembly system?

John Varde

They're saved as Word documents in Box and when you create a template within the software, it opens it as a Word document.

Suzanne L. Hawkins

I want to thank everyone for weighing in on PracticePanther because you just saved me from a worse fate with Clio. I actually contracted with Clio 2 days ago, even though I was not convinced about its features and ballooning pricing, and now am going to switch. PracticePanther is MUCH more intuitive, and although not less expensive monthly, is far easier to navigate with more features. Many thanks again!!!

Lyza L. Sandgren (not a lawyer), Georgia

Suzanne:

Are your templates also using logic such as IF the Contact is the Clerk of Court on the Matter THEN include their address here?

Or is it a more basic assembly of go get this field and put the content here, for the chosen Contact?

Nancy Duhon, Georgia

They're not tied into contacts, they are within the matter. There's no IFTTT going on. You simply complete the custom fields within each matter and then you can choose any of the templates from within the matter.

Suzanne L. Hawkins

They currently do not integrate with OneDrive. Something about APi differences between OneDrive and the Box/DropBox interfaces.

William C. Deveneau, Vermont

Hmm, that changes things! I'll take a look. My current management system is pretty powerful, and does PDF assembly (great for judicial council forms here in California). But the Cloud is always the bright shiny object.

I'll play around with it.

Joseph D. Dang

Not married to one drive. I'm on Dropbox but just recently started

Office365 which included one drive. Was going to transfer over. But it's

$10 a month. No biggie.

Joseph D. Dang

When you open a matter of create a new contact there is a #first.name# field created and a corresponding #description# for each field in the PP system.

When you are in Create Template screen you can see all the #codes#. You copy them into your word doc. Save this word doc someplace on your system/DropBox or wherever.

Then, while in the PP browser window, upload the newly created template, name it, tag it, done.

When you are in the client or matter, select NEW template and all your uploaded docs appear.

Hocus-Pocus, it downloads a template for you.

Michael J. Sweeney