



Online Services for Law Firms

Operating a law firm remotely can be easier and far less expensive than many believe is possible. For as little as \$12/mo per user, you can have access to a suite of tools that will allow you to access and work with documents, as well as to collaborate with others, from anywhere you have a reliable internet connection. For less than \$150/mo per user, you can have enterprise-grade services that will allow you to do everything from manage your firm and enjoy robust telephone and video conferencing services to advanced document management services and cloud-based collaboration platforms. Not only are these services affordable and scalable, but they are easy to set up and use.

There are many service providers out there, and the CBA does not intend the following list either to be exclusive or to connote any preference for those services that are listed. The providers listed below represent many of the most popular service providers in each of the categories listed. During these unprecedented times, the goal is to provide you with a starting point to identify and utilize those services that likely will be necessary to operate your legal practice remotely so you can minimize the financial impact that COVID-19 will have on your practice.

Conceptually, we have broken down the different service providers into four categories: (1) bundled office services, (2) firm management/billing services, (3) video conferencing/collaboration platforms, and (4) miscellaneous firm services. It is important to note that there is often some overlap between the different service providers. For example, many of the bundled office service providers also include video conferencing and collaboration platforms and many of the firm management/billing service providers provide the type of productivity tools that are commonly included in the bundled office services. As a result, if you already have some of the services provided below or if you sign up for these types of services, you should check to see what is included to make sure you minimize overlap and get the greatest return on your investment.

BUNDLED OFFICE SERVICES

Microsoft Office 365:

Office 365 is an integrated experience of secure apps and services, designed to help you pursue your passion and grow your business. Get apps like Word, Excel, PowerPoint, and more, updated monthly with the latest features and security updates.

Use cloud-powered email to reach customers and coworkers wherever work takes you.

Collaborate in Microsoft Teams, the new hub for teamwork where you can chat, organize meetings, and share files.



Save files to OneDrive with one terabyte of online storage, allowing access across devices and on the go.

Run your business with the Business Apps, empowering you to manage customer scheduling, invoicing, referrals, and more, all from one place.

For general information, visit <https://www.microsoft.com/en-us/microsoft-365>

For Small Business Plans, visit <https://products.office.com/en-us/business/small-business-solutions?rtc=1>

For Enterprise Plans, visit <https://www.microsoft.com/en-us/microsoft-365/business/compare-more-office-365-for-business-plans>

To see how to sign up for an Office 365 account, view this video
<https://www.microsoft.com/en-us/vidoplayer/embed/RE3znhX?pid=ocpVideo0-innerdiv-oneplayer&postJsllMsg=true&maskLevel=20&market=en-us>

To see how to set up an Office 365 business account, view this video
<https://www.microsoft.com/en-us/vidoplayer/embed/RE1FYSM?pid=ocpVideo0-innerdiv-oneplayer&postJsllMsg=true&maskLevel=20&market=en-us>

Google G-Suite:

G Suite is an integrated suite of secure, cloud-native collaboration and productivity apps powered by Google that offers your business professional email, shared calendars, online document editing and storage, video meetings, and much more.

For general information, visit <https://gsuite.google.com/>

For Business and Enterprise Plans, visit <https://gsuite.google.com/pricing.html>

To see how to sign up for an Office 365 account, view this video
<https://www.youtube.com/watch?v=gPwJJ2EjIno>



FIRM MANAGEMENT/BILLING SERVICES

Clio

Clio is a cloud-based legal practice management solution suitable for small to large law firms. The platform enables law firms to track important deadlines, manage cases and documents, bill clients, and accept payments.

For general information, visit <https://www.clio.com/features/>

For information regarding plans and pricing, visit <https://www.clio.com/pricing/>

To see how to set up a Clio account, view this video <https://support.clio.com/hc/en-us/articles/115004641233-Video-How-to-Set-Up-Your-Clio-Account>

Amicus Online

Amicus Online is an intuitive case management software solution that tracks and invoices billable time, automates important documents, and provides access to all your clients, cases, and matters.

For general information, visit <https://www.amicusattorney.com/online/>

For information regarding plans and pricing, visit <https://www.amicusattorney.com/pricing/>

PracticePanther

PracticePanther is a user-friendly law practice management and billing software that caters to users in the legal profession ranging from sole lawyers to entire law firms. ... For software developed with an aim to allow users to have a fully automated law firm, using PracticePanther is simple and direct.

For general information, visit <https://www.practicepanther.com/>

For information regarding plans and pricing, visit <https://www.practicepanther.com/pricing/>

To learn how to use PracticePanther, view this video <https://www.youtube.com/watch?v=WJ-hl6qHBV8>



Rocket Matter

Rocket Matter is a cloud-based legal billing and management solution designed to cater small and midsize law practices. It features time and billing management, calendar, document management, payments and collaboration management modules.

For general information, visit <https://www.rocketmatter.com/awesome-features/>

For information regarding plans and pricing, visit <https://www.rocketmatter.com/legal-practice-management-pricing/>

To learn how to use Rocket Matter, view this video <https://vimeo.com/336650213>

Zola Suite

Zola Suite is a complete end-to-end practice management platform that enforces organization, streamlines workflow and facilitates collaboration. With best-in-class case management tools built into a single, easy-to-use platform, Zola Suite allows you to harness the power of one to manage your entire caseload.

For general information, visit <https://zolasuite.com/>

For information regarding plans and pricing, visit <https://zolasuite.com/pricing/>

To learn how to use Zola Suite, view this video <https://help.zolasuite.com/portal/kb/articles/zola-suite-overview-video>

2B-Law 365

With 2B-LAW 365, you get a legal case management solution that takes advantage of all that Microsoft has to offer. Utilize your Office 365 products, Outlook, etc. and have it fully integrated with your case management. Simplify your matter and client management by enabling legal professionals and administrators to work securely and collaborate from any device, anytime. Built as a Dynamics 365 solution, 2B-LAW 365 is a simple to use legal management solution that will replace time-consuming, manual processes with new point-and-click automation.

For general information, visit <https://www.2bsolutions.com/solutions/2b-law-365/>

For information regarding plans and pricing, visit <https://www.2bsolutions.com/wp-content/uploads/2018/05/2BLAWSellSheet.pdf>



To learn how to use 2B-Law, view this video <https://www.youtube.com/watch?v=JdFFbS7mSk4>

Soluno

Soluno's suite of integrated features puts all your time, billing, and accounting functions in one place - no need for additional accounting packages.

For general information, visit <https://www.soluno.legal/>

For information regarding plans and pricing, visit <https://www.soluno.legal/pricing>

VIDEO CONFERENCING & COLLABORATION PLATFORMS

Zoom

Zoom is a leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, telephones, and room systems. Zoom Rooms is the original software-based conference room solution used around the world in board, conference, huddle, and training rooms, as well as executive offices and classrooms.

For general information, visit <https://zoom.us/meetings>

For information regarding plans and pricing, visit <https://zoom.us/pricing>

To learn how to set up and use Zoom, view this video <https://www.youtube.com/watch?v=qsy2Ph6kSf8&feature=youtu.be>

Microsoft Teams

Microsoft Teams is a unified communication and collaboration platform that combines persistent workplace chat, video meetings, file storage (including collaboration on files), and application integration. It is the hub for team collaboration in Office 365 that integrates the people, content, and tools your team needs to be more engaged and effective.

For general information, visit <https://products.office.com/en-us/microsoft-teams/group-chat-software>

For information regarding plans and pricing, visit <https://products.office.com/en-us/compare-all-microsoft-office-products?activetab=tab:primaryr2>



To learn how to download Teams if it is included in an Office 365 plan you already have, view this video <https://support.office.com/en-us/article/install-office-apps-and-teams-4d2a1b69-6d8c-45d1-88e0-6676a8efa5f1?ui=en-US&rs=en-US&ad=US>

To learn how to use Teams, view this video <https://www.microsoft.com/en-us/videoplayer/embed/RWeqWC?pid=ocpVideo0-innerdiv-oneplayer&postJsllMsg=true&maskLevel=20&market=en-us>

Cisco WebEx

Cisco WebEx is a cloud-based suite of productivity tools that keeps teams connected. Including WebEx Teams, WebEx Meetings, and WebEx Devices, this suite merges the web conferencing platform and the Spark team collaboration tool from Cisco.

With video meetings, file sharing, and team messaging, the suite allows for unified communications for any business from SMBs to enterprise-wide needs. With WebEx, all meetings within a company can be supported by either Cisco WebEx Meetings or WebEx Teams apps. The product also supports deployments of WebEx Hybrid Services.

For general information, visit <https://www.webex.com/>

For information regarding plans and pricing, visit <https://www.webex.com/pricing/index.html>

To learn how to use WebEx, view this video <https://help.webex.com/video?videoId=6088111381001>

Google Hangouts Meet

Connect with your team from anywhere. With easy-to-join video calls, you can connect face-to-face with team members around the world. Hangouts Meet is included with G Suite and G Suite for Education.

For general information, visit <https://gsuite.google.com/products/meet/>

For information regarding plans and pricing, visit <https://gsuite.google.com/pricing.html>

To learn how to use Meet, view this video <https://www.youtube.com/watch?v=K6vwkDZC0AY&feature=youtu.be>



*The free version of Meet that is available to anyone with a Gmail account is called Hangouts. To see how to use Hangouts, view this video <https://www.youtube.com/watch?v=MXUJCVFnaiE>

Slack

Slack brings team communication and collaboration into one place so you can get more work done, whether you belong to a large enterprise or a small business. Check off your to-do list and move your projects forward by bringing the right people, conversations, tools, and information you need together.

For general information, visit <https://slack.com/>

For information regarding plans and pricing, visit <https://slack.com/pricing>

To learn how to use Slack, view this video <https://youtu.be/EYqxQGmQkVw>

MISCELLANEOUS FIRM SERVICES

Sfax

Designed to withstand the rigors of healthcare, Sfax is HIPAA secure and enables you to send, receive, annotate, digitally sign and manage faxes without printing a single physical document. All your documents are protected by strong encryption within our SSAE16 Type 2 data centers. Safely manage all your faxing with powerful, easy to use features and enterprise-level flexibility with our Fax API for easy interoperability.

For general information, visit <https://www.scrypt.com/sfax/>

For information regarding plans and pricing, visit <https://www.scrypt.com/sfax/sign-up/>

To learn how to use Sfax, view this video <https://youtu.be/sSHxiHLTcP8>



eFax

eFax® is a premium Internet fax service that makes it easy to send and receive faxes by email and online using your phone, tablet or computer.

No fax machine. No fax phone lines. No printing. No busy signals.

For general information, visit <https://www.efax.com/>

For information regarding plans and pricing, visit <https://www.efax.com/pricing>

To learn how to use eFax, view this video <https://www.efax.com/videos/default-source/pagespeed/how-it-works/how-online-faxing-works---efax23d31039dd476859a4abff000097cdd4.mp4?sfvrsn=2>

Quickbooks Online

No need to be an accounting expert. QuickBooks keeps everything organized in one place, so you're tax ready all the time. Easy-to-read reports and dashboards help you make smarter business decisions.

For general information, visit <https://quickbooks.intuit.com/>

For information regarding plans and pricing, visit <https://quickbooks.intuit.com/pricing/>

To get started with Quickbooks Online, watch this video <https://youtu.be/9KaRDDFm8lw>

Xero

Xero's secure online accounting software lets you work from anywhere, share with your employees and collaborate with your advisors. Just add apps to create a complete solution for your business.

For general information, visit <https://www.xero.com/us/features-and-tools/accounting-software/>

For information regarding plans and pricing, visit <https://www.xero.com/us/pricing/>



To get started with Xero, watch this video

<https://tv.xero.com/detail/videos/featured/video/5298044970001/getting-started-with-xero?autoStart=true>