ZenCase

ZenCase Solves Complex Problems for Law Firms, Improves Lawayer Productivity, and Increases Work Product with Less Effort

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Company Name Brand
Groundswell Productivity Solutions, LLC, d/b/a ZenCase

Product Name Brand(s)
ZenCase

Latest Developments and Updates

- ZenCase has developed Automated Time Manager™ technology to recommend matter and client billing based on actual work done and meetings.
- Deeper integration with NetDocuments, providing increased automation and workflows around client intake and document creation.
- A phone app is in development to improve mobile access to ZenCase.

Tackling Your Challenges
ZenCase cloud-based law practice software aims to resolve complex problems facing midsize to large law firms. The software-as-a-service (SaaS) solution addresses information overload, relieves client pressure to produce more work products in less time, and accommodates complex and evolving billing arrangements.

Dashboards, Search, and Key Functionality
Your experience in ZenCase begins with customized dashboards. Any information that ZenCase collects and stores, and you have permission to view, can be displayed in rich data visualizations. For example, you can drill down to analyze specific details on firm financials and productivity. *See Figure 1*.

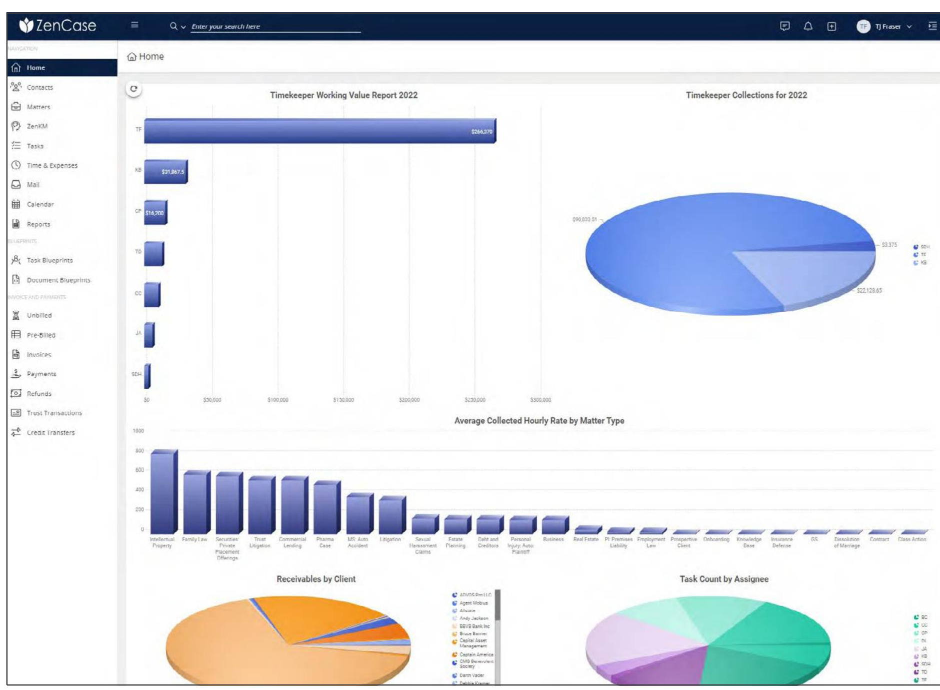

Figure 1: Landing pages display configurable, data-driven dashboards. Here, timekeeper data is displayed by working value, annual collections, collections by matter type, receivables by a client, and task count by the assignee.

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ZenCase enforces a single-click rule–as many actions as possible should result from a mouse click to reduce effort and save time. You can quickly look up anything in the system using a search window atop the user interface (UI) and access the support desk, get notifications, and quickly add content to the system. The quick-add function creates matters, contacts, tasks, expenses, and time entries. Use a ZenKM (Knowledge Management) feature to create and record case-related information, such as a memo or telephone message.

You can also access favorites, bookmarks, and start timers to record billable work, but creating and stopping timers is not necessary for ZenCase. The software can predict and prepare a suggested timesheet for users in the background based on calendar items and time spent on client tasks, such as email and document generation. Alternatively, the system can pop up an alert and remind you to record time spent on a client task.

The left panel of the UI provides navigation to various ZenCase functions. The system manages customer relationships, tracks all connections (including individuals and organizations), and shows how they connect to matters and each other. You can also manage case knowledge using the ZenKM function, apply case filters, or access a specific matter where the KM feature appears in a tab.

Extensive Matter Information

A firm must have all information on a matter in one place without overloading the UI with data and overwhelming users. The ZenCase matter UI accomplishes this mission, bringing a matter into focus with all related material and contacts without creating information overload.

A matter summary is displayed across the top of the UI, including name, number, originator, manager, client, status, and matter type, with a separate tab of summary billing data. More detailed billing and other content information appear in a tabular format underneath the top. Beneath that, there are tabs for tasks, memos, files, charges, billing, mail, trust transactions, credit transactions, ZenKM, and more.

The ZenKM function can manage all case or firm-related knowledge and information. The knowledge management UI includes tabbed or card displays of subjects, facts, questions, answers, authorities, connections, documents, and memos, where each tab has columnar data for various fields. You can create custom records and dynamic questionnaires to automate complex documents with client data, such as compliant regulatory filings.

Users can access two document libraries. One library contains law firm documents, and the other is a Groundswell library containing ZenCase-curated documents. You can create document templates or blueprints incorporating client data and add them to any matter.

The ZenCase Chrome Extension can create and link objects, such as tasks, questions, authority, documents, and emails. You can use a browser like Chrome or Microsoft Edge to connect and find information in context and sourced to reference or resource material. Create a subject in ZenKM and click the link icon on the item to join facts, questions, answers, and other elements. Each link can support an internal URL to a ZenCase source—like a matter or contact, or an external resource such as LexisNexis, Westlaw, or another internet resource. ZenKM is very useful for organizing trial or deposition flow, with links to supporting documents or references. You can quickly create a ZenKM item from the top menu bar, add it to a matter with a question, and assign it to an associate. Click the eye icon on a line item in the grid view and quickly find any open tasks or questions.

You can clone matters to create new ones or clone matter types to reuse. All matters can import tasks and Task Blueprints to reuse work and automate workflows.

Tasks and Task Blueprints

ZenCase supports project management using tasks and Task Blueprints. You can create a task, link it to an item, such as an email or memo, and assign it to an associate. The related resource stays with the task for easy reference.

Tasks support predecessor-successor logic (dependencies) that, when linked together, create a workflow or project. Establish start and completion dates, like a court filing date, which can then be saved to the task owner's calendar. Priority, fee type, budget

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amount, tags, and other parameters can also be set. Tasks may be viewed in a list view or Gantt chart view. *See Figure 2.*

Time, Billing, and Accounting

ZenCase reduces the time and effort spent on firm financials and brings visibility to client, matter, and firm-wide billing and collections. You can quickly add an expense record and assign it to a matter, adding any related information as an attachment, such as a receipt or itinerary. ZenCase can enforce rules on expenses and time records to meet client budgets and requirements.

ZenCase supports Legal Electronic Data Exchange Standard (LEDES) billing, and variable LEDES code sets to apply to timesheets and invoices. You can also require Uniform Task-Based Management System (UTBMS) codes.

Generate prebills by matter, originator, or managing partner, and review, edit, and approve invoices in real time. ZenCase supports split-fee billing and alternate billing contacts. Send invoices via email with options to include client, matter, or invoice summaries and customized cover letters. The system supports trust accounting, client refunds, can allocate payments to expenses first and then pay multiple invoices, and supports pay when paid, which is ideal for the firm wanting to pay service providers after receiving payment from the client.

ZenCase uses QuickBooks Online Plus or Advanced subscriptions to ensure that firms handle financial transactions correctly and to view financial statements, such as income statements and balance sheets. With QuickBooks, track classes and locations to organize transactions and set the firm member as the class to give you deep insights into expenses and profitability per member. Most will manage firm financials, including billing, collections, trust balances, and reporting from within ZenCase, where you enter client information only once, and the data synchronizes to QuickBooks.

Reporting

ZenCase has two types of reports: standard and custom. Standard reports support all firms, such as aging client and matter accounts receivable, client invoices and payments, collections overview, time entries, and more. Use filters on standard reports to display complex data without SQL search queries.

With a custom report builder, create any report on any aspect of the firm using ZenCase's intuitive interface to InsightSoftware's Logi Analytics (formerly Exago) to select and report on various fields.

ZenCase uses role-based permissions to secure data from unauthorized access. You can create security groups or assign permissions at the individual level,

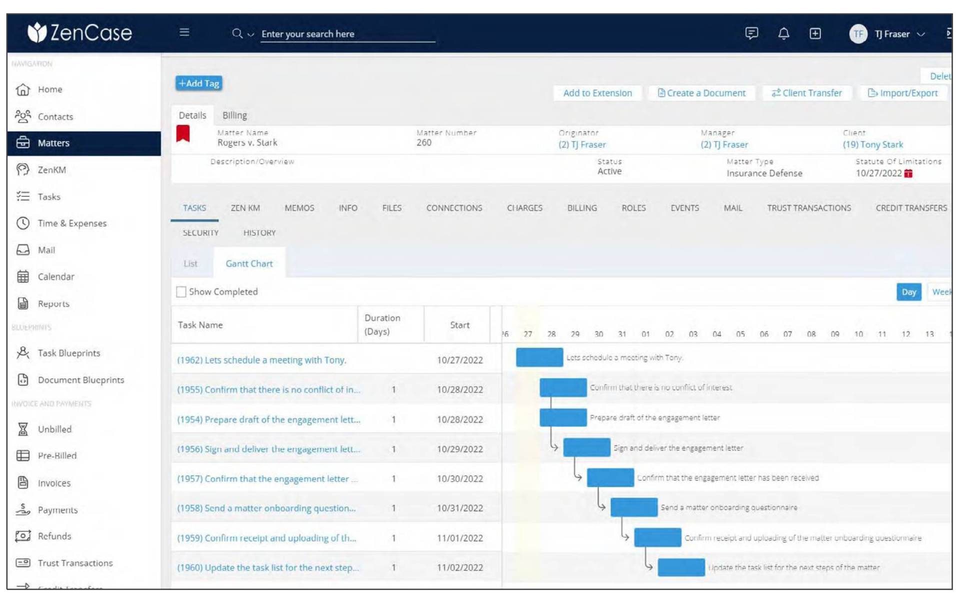

Figure 2: Create projects in ZenCase using task dependencies and display them in Gantt charts where you can identify bottlenecks and work stoppages.

including the ability to create, view, update, and modify objects in ZenCase, such as blueprints, contacts, matters, and more.

Public Cloud and Integration

ZenCase uses a multitenant software architecture in Amazon Web Services (AWS). The SaaS platform supports an application programming interface (API) to **integrate** popular cloud storage repositories, including Box, Microsoft SharePoint, and NetDocuments. *See Figure 3*.

Once an administrator enables a cloud storage integration, each ZenCase member can create clients, matters, and work documents in the repository. Otherwise, ZenCase does not include storage services.

Connect a Microsoft 365 Business or Enterprise account to ZenCase to use Outlook in ZenCase and manage your calendar and contacts within each client and matter. With bidirectional synchronization, ZenCase work will appear in Outlook online, on the desktop, and on the mobile app.

Pricing

ZenCase costs $999 per user per year. ZenCase will migrate your data from a CSV file or SQL table for free. For more complex data migrations, ZenCase uses certified consultants to help you prepare and migrate data. ZenCase provides data migration and customization credits with a three-year agreement.

Who is ZenCase?

Jacksonville, Florida-based Groundswell Productivity Solutions, doing business as ZenCase, makes its namesake cloud-based law practice management system for lawyers to find better ways to solve complex problems, create work product in less time and effort than other solutions, and reduce administrative overhead. Thomas J. Fraser, Jr., CEO and founder, leads ZenCase with an **advisory team** experienced in finding better ways to solve complex problems. The company has more than ten full-time employees and certified consultants to maximize law firm productivity with ZenCase.

Why Buy ZenCase?

- ZenCase brings all data to bear in solving complex client problems by effectively managing firm, client, and matter information for easy access.
- Easy-to-use UI supports customer relationships and project management with task dependencies and automated workflows.
- Create tasks in context with email, documents, and other ZenCase objects, including evergreen references and attachments.
- Integrate with popular cloud-based storage solutions, QuickBooks Online for accounting, Microsoft 365, LawPay, and other useful tools.

See ZenCase Today!

See how ZenCase can bring Zen into your law practice and make it more productive with less work. **Request a demo today!** ■

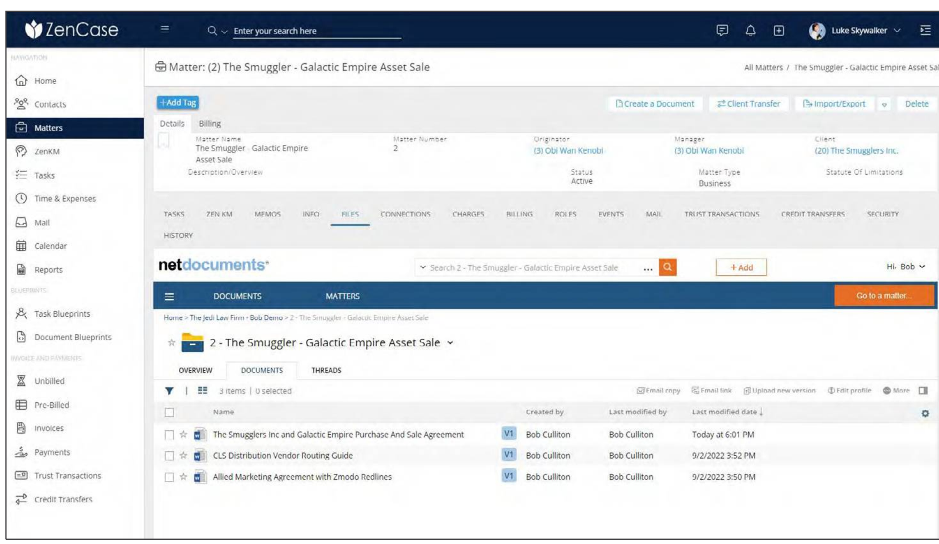

Figure 3: The ZenCase matter interface brings together all matter data without clutter or information overload. The files tab displays all the documents associated with the matter; in this example, they are stored through the integration with NetDocuments.