

PRACTICE MANAGEMENT SOFTWARE PACKAGES

Choosing the right technology is one of the most important decisions a lawyer will ever make. It impacts how you deal with your clients, the type of work you do and how you manage your workload so you can go home at night.

To help you choose the option that is right for you, we compared the main features and costs of some of the top practice management packages currently on the market. To focus our inquiry, we only looked at those packages that the Law Society of Alberta's Trust Safety Department has confirmed meet its trust safety filing requirements.

In creating this side-by-side comparison, our goal is to place the choices on a level playing field and give you a starting point to choose the optimal product for your needs.

The prices and feature noted are based on the best available information, are current as of the date of publication and are subject to change by the vendors.

Before making any purchase decision, you should reach out to the vendors or your IT consultant.

We're also happy to answer any questions you may have. Please feel free to contact us at practice.management@lawsocietyab.ca at any time.



| | ABACUSLAW | ACUMIN | ADERANT EXPERT EXPERT SIERRA | BRIEF LEGAL | CLIO | COSMOLEX | ELITE PROLAW ELITE 3E | ESILAW | GHOSTPRACTICE | PCLAW | SOLUNO | ULAW |
|------------------------------------|---|---------------------|--|---|---|---|--|--|---|---|---|---|
| BEST FOR | Any size | 20+ | Aderant Expert – smaller firms – min 20 users Expert Sierra – medium – 100+ lawyers | Small/medium | Any size | Any size | Prolaw – small 3E – 40+ lawyers | Any size | 5-200 users | Any size | Any size | Small to mid sized law firms (1-10 Lawyers) |
| OS | Windows or Cloud Requires Windows for 2+ users | Windows | Aderant Expert – Windows Expert Sierra – cloud | Mac & Windows Timekeeping app - cloud | Cloud | Cloud | Prolaw – Windows or cloud 3E – cloud | Windows, Cloud (limited access on Mac) | Windows | Windows | Mac, Windows, Cloud (OS agnostic) | Any - uLaw is cloud-based (native android and iOS app) |
| UNIQUE FEATURES | Great email integration | | | Integrated billing & accounting package with a focus on Mac users | End-to-end, integrated client intake & practice management package. 150+ integrations. Great 24/5 customer support. Free data migration, on-boarding & 1:1 training | Integrated practice management, billing, general & trust accounting. No QuickBooks required. Free 1:1 training & setup. | | Integrated practice management & accounting solution designed for the Cdn market. Complete set of financial reports, trust accounting. Integrations with key service providers. 24/5 Cdn customer support. | Complementary onboarding & data transition services | Legacy product. Familiar to bookkeepers. Restrict General Retainers. Customizable invoices & user security. | Integrated time, billing, & accounting designed for Cdn law. No need for other accounting packages. 5-star customer support. Free full matter history data conversions. | Legal accounting and practice management all-in-one. Court form automation. Specifically made to satisfy compliance obligations laid out by Law Societies across Canada. Dozens of integrations, free onboarding and help with migration with our client success team, free trial. No extra accounting software like Quickbooks required. Lastly, we also offer complete bookkeeping at a low cost of \$40 per hour |
| SERVER LOCATION | Canada, US & UK User choice of Cdn server | US | Aderant Expert – Desktop Expert Sierra – US | Desktop Timekeeping app – US | User choice of Cdn or US servers | Cdn users – Canada US users– US | Prolaw – desktop or cloud 3E – cloud | Canada | Canada | Desktop | Cdn Users - Canada USA Users - USA Option to host on local server | Canada only (uLaw is a Canadian company serving only Canadian law offices) |
| COST (USD UNLESS SPECIFIED) | Not provided. Contact sales rep for pricing. | \$995/one-time/user | Not provided. Contact sales rep for pricing. | \$49/mo/1st user. \$25/mo/additional users | \$39-99/user/mo Suite including Clio Grow - \$90/user/mo Does not include Quickbooks or Zero subscription | \$69/user/mo | Not provided. Contact sales rep for pricing. | C\$100/user/mo | C\$50/user/mo subject to \$500/mo minimum | C\$56/user/mo | Cloud - starts at C\$94.00/mo On-Premise - starts at C\$64.00/mo Price per user decreases as license count increases | C\$44/month-to-month , C\$34/monthly per year (We also have New Entrepreneur and Student rate at C\$29/month for the first year) |

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| DISCOUNTS | | | | | Lawpay monthly fees covered by Clio. 10% discount to LSA members | Lawpay monthly fees covered by CosmoLex. Free login for external book-keeper or accountant | | Volume license pricing available | | | 10% off MSRP (excluding hosting costs), Free full-matter history conversion when you pre-pay for the year. | Alberta lawyers who activate prior to May 1st 2022 get the same new entrepreneur discount: \$29/month first year, \$34/month 2nd year (Save \$180 in 1st yr & \$120 in 2nd yr) |
| CONTRACT TERM | 36 mo. | N/A. User purchases software licence | Not provided | None | Monthly or annual | Monthly or annual | Not provided | Monthly or annual | 1 yr. | N/A. User purchases software licence | Monthly or annual | Month-to-month or annual pricing |
| CANCELLATION & NOTICE OF TERMINATION REQUIREMENTS | End of subscription only | N/A | Not provided | 1 mo. | 30 days. Self-serve plan downgrade at any time. | Any time | Not provided | 30 days | 60 days | N/A | 30 days. Outstanding balance of any prepayments refunded minus 20% non-refundable deposit. | 30-day cancellation notice |
| DATA PRESERVED FOLLOWING TERMINATION | Desktop - user owns the data Cloud – 30 days | N/A | Not provided | User retains data with read-only version of application | 90 days | 30 days | Not provided | 67 days in cloud, 1 year preserved as back-up file | User owns the data | User retains ownership of software & access to data | After termination, users receive 15-20 day grace period to access & export their data. All data is then removed from Soluno's servers. Soluno provides decrypted Microsoft SQL database of user's data they can access, control, & move to another product long after license ends. | 60-day |
| BACKUP | Utility available within application | User responsible for backups | Aderant Expert – User responsible for backups Expert Sierra – not provided | User responsible for backups | Performed daily to multiple locations plus optional weekly backup to Amazon S3 storage | Performed continuously to multiple Canada-based locations | Not provided | Performed daily with downloadable backups | User responsible for backups. Automated feature within. | User responsible for backups | Continuously to multiple Cdn locations. On-premise users responsible for their own data & backups. With Cloud, backup data is available at any time upon request. All data on Soluno can be backed-up & exported. Backups can be accessed within Soluno as Microsoft SQL files, or can be exported & downloaded as Excel, CSV, & PDF. | Backed up on secure fault-tolerant cloud network |
| ARE BACKUPS RETAINED? | Desktop – user controlled Cloud - 1 mo. | N/A | Aderant Expert – user controlled Expert Sierra – not provided | User controlled | Not provided | 14 days | Not provided | 30 days | User controlled | User controlled | User controlled | Yes |
| ENCRYPTION | AES 256-bit encryption | User responsible for security | Aderant Expert – User responsible for security Expert Sierra – GDPR compliant | User responsible for security Timekeeping app - 128-bit SSL & Oauth 2.0 authentication | 256-bit SSL in-transit & at-rest encryption, SSAE 16 2-factor authentication Daily malware scans by McAfee Secure, GDPR compliant | 256-bit SSL in-transit & at-rest encryption. 2-factor authentication | 3E – 'Industry leading Microsoft security' | 256-bit SSL in transit & at-rest encryption, SHA2; 2-factor authentication | User responsible for security | User responsible for security | 256-bit SSL in transit & at-rest encryption. 2-factor authentication available, field-level data encryption | AES-256: block cipher used by government agencies |

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| LONGEST OUTAGE SERVICE HAS EXPERIENCED | N/A | Not provided | Not provided | None | Not provided. 99.9% uptime Service Level Agreement | 20 minutes | Not provided | None | None | User controlled | 99.9% uptime | None |
| MOBILE APP | iOS, Android | No | No | Yes for timekeeping. Web-based | iOS, Android | iOS, Android | iOS, Android | No | iOS, Android | iOS, Android | No | Yes |
| EMAIL INTEGRATION | Outlook | Outlook | Aderant Expert – Outlook, iCalendar Expert Sierra-Exchange, Office 365 | No | Outlook, Google | Outlook, Google, Yahoo Mail, Apple Mail | Outlook | No | Outlook | Outlook (not all versions) | Outlook | Yes |
| CALENDAR INTEGRATION | Outlook | Yes | Not provided | No | Outlook, Google | Bi-directional with Office 365 & Google | Outlook | Office 365 | Outlook | Outlook (not all versions) | Outlook | Yes |
| OTHER INTEGRATION | DisplaySoft, DoubleTime, Equitrac, Fonality, InfusionSoft, LandTech, Nextiva, Papercut, Salesforce, Uniflow, Word | Android, Blackberry, iPhone | Not provided | Multiple copy tracking services (Docketman, Equitrac, PaperCut etc.) | Casetext, Chrometa, Dealcloser, Docusign, Lawmatics, Netdocuments, Podium, Scansnap, Smith.ai, Wordpress, Zapier & hundreds more | Box, Chrometa, Copy tracking (Copitrak, Equitrac, PaperCut etc.), The Conveyancer, Drive, Dropbox Google, OneDrive, RealtiWeb/ LawyersDoneDeal, Unity & more | Office, Westlaw | Dropbox, Google Drive, OneDrive, econveyance | ACL5, The Conveyancer, Copitrak & most other cost recovery systems, LEDES eBilling, Office | Word (not all versions) | LawPay, Fattmerchant, CASEpeer, The Conveyancer, NetDocuments, Office 365, YoCierge, LEDES | OneDrive, Google Drive, Conveyancer, LDD, Toggl, Nuvei Payments, TD Payments, Moneris, Global Payments, Can import all Canadian banks and credit cards (working with Lawpay for Summer 2021 release) fully native android and iOS App |
| ONLINE PAYMENT | APX Abacus Payment Exchange | Not provided | Not provided | No | Clio Payments, powered by LawPay | CosmoPay, powered by LawPay | Yes | No | No | Integrates with OpenEdge for client payments | LawPay, Fattmerchant | payment integration with Nuvei Payments, TD Payments, Moneris, Global Payments, (working with Lawpay for Summer 2021 release) |
| CLIENT MGT | Yes | Yes | Some | Full integration with Clio Grow | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| CLIENT PORTAL | Yes | Yes | Not provided | No | Yes | Yes | Yes | No | No | No | No | Yes |
| DOCUMENT MGT | Yes | Yes | Yes | No | Yes, including Full Text Search | Yes | Yes | Yes | Yes | Yes | Basic with Soluno. Advanced via NetDocuments integration | Yes |
| CUSTOM WORKFLOWS | Yes | Yes | Expert – Yes | Yes | Yes | Yes | Yes | No | Yes | Ability to create Custom tabs & fields | No | Yes |
| TIME & BILLING | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| CONFLICT CHECKING | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| MULTIPLE CURRENCIES | No | Yes | Not provided | No | Yes | No | Yes | No | Yes | Yes | No | Canadian Only |
| FULL ACCTG | Yes | Yes | Yes | Yes | No. Requires Quickbooks or Xero | Yes | Yes | Yes | Yes | Yes | Yes | Yes (trust and general accounting and fully certified bookkeeping solution) |
| TRUST ACCTG | Yes | Yes | Yes | Yes | Yes, but Requires Quickbooks or Xero | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
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