PRACTICEPANTHER®

ONLINE

LIVE STREAM

ACCELERATE EFFICIENCY

Law Firm Automation for Today's Remote Hybrid Environment

Speaker

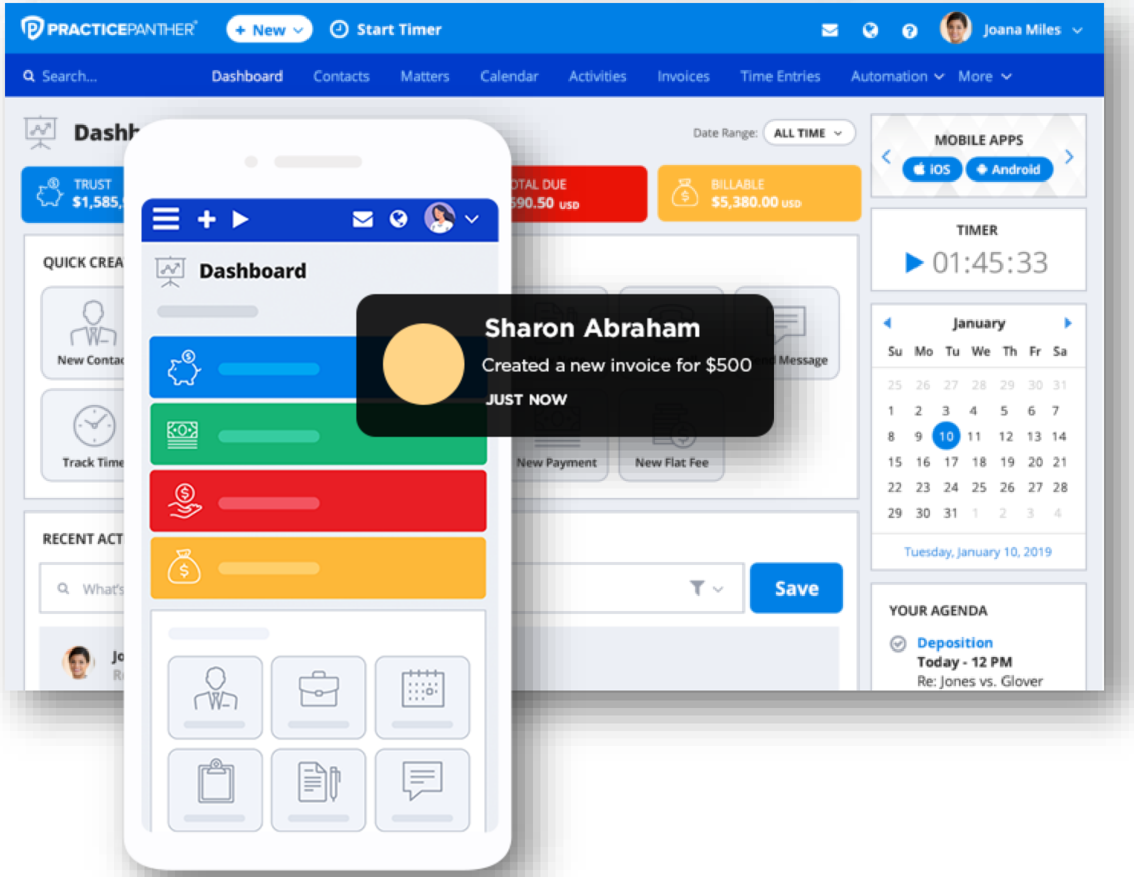
BRIAN GOMEZ
Account Executive
PracticePanther

Today’s discussion

- Overview
- Easy time entry practices
- The power of automated workflows
- Recover lost time with MoneyFinder
- Q&A

PracticePanther

All-in-one legal practice management software



Automate workflows
Set conditional tasks, reminders, and custom tags.

Seamless case management
Link your contacts, matters, and invoices.

Built-in compliant payments
100% compliant with IOLTA, ABA, and all 50 state bar guidelines.

Secure, built-in eSignature
Easily send multiple documents for signing at a time. Send and view signed copies of documents from PracticePanther.

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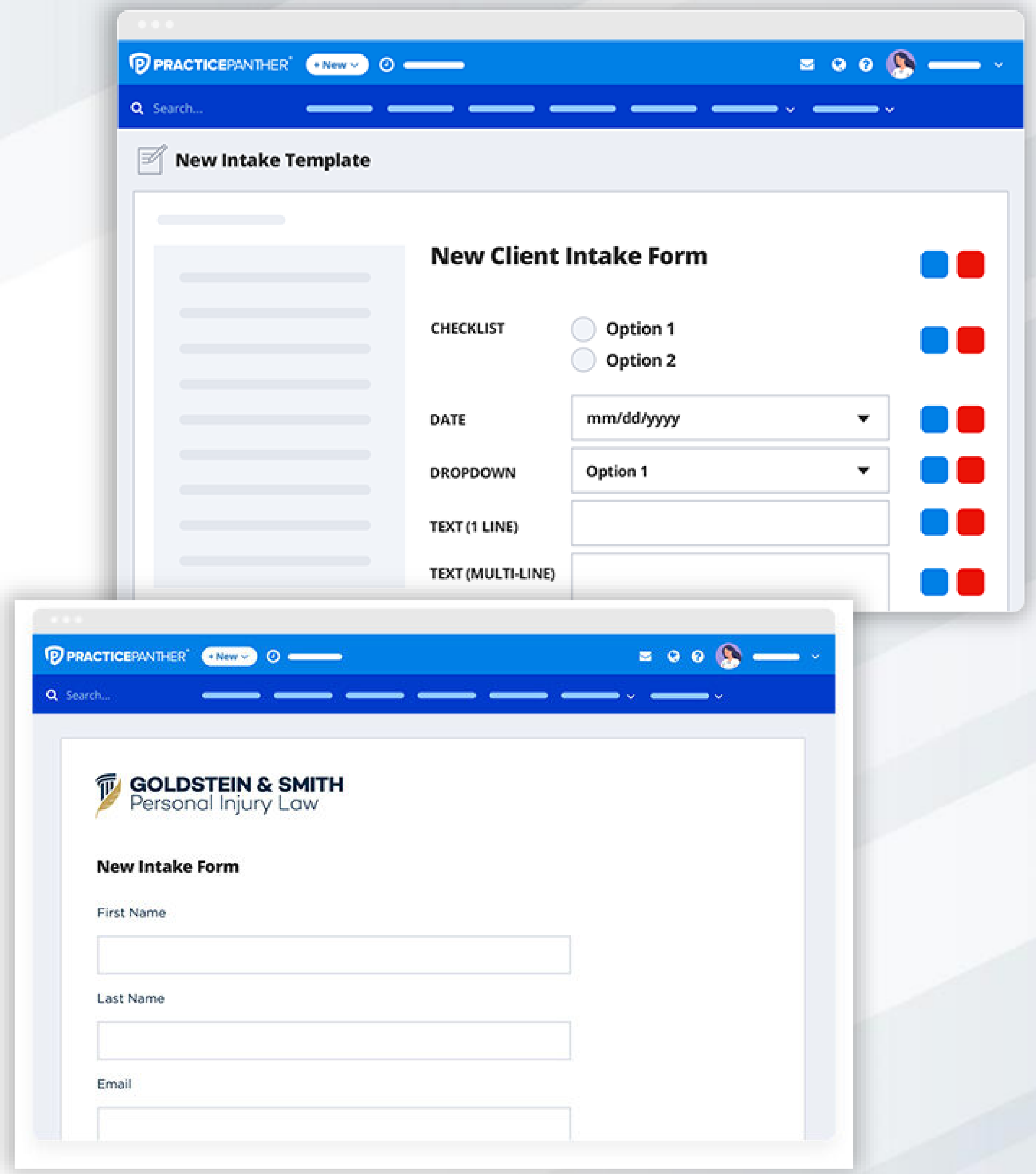
Streamline intake with PracticePanther

Fast & seamless intake process
Go paperless and invite clients to fill out intake forms on your website or via an iPad in the office. No more shuffling paperwork.

Customize the look & feel
Build unlimited intake forms that reflect your firm.

From Lead to Referral
Intake forms can be multi-functional for different stages in a case.



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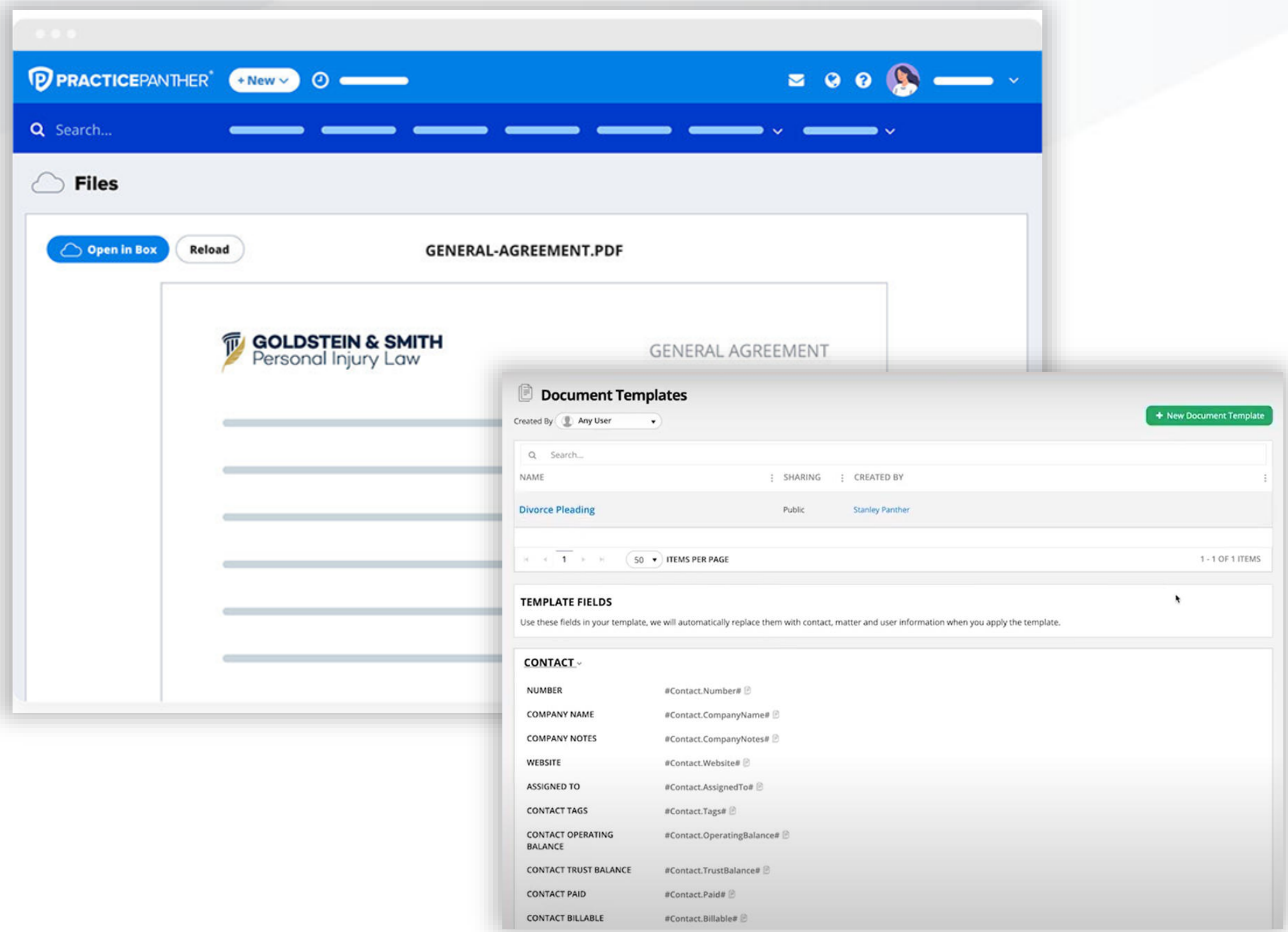
Create custom document templates



- Create and customize templates for demand letters, wills, fee agreements, and any type of document you need to generate repeatedly — then use it again and again.
- Our white-label templates let you send professional documents with your logo, not ours.

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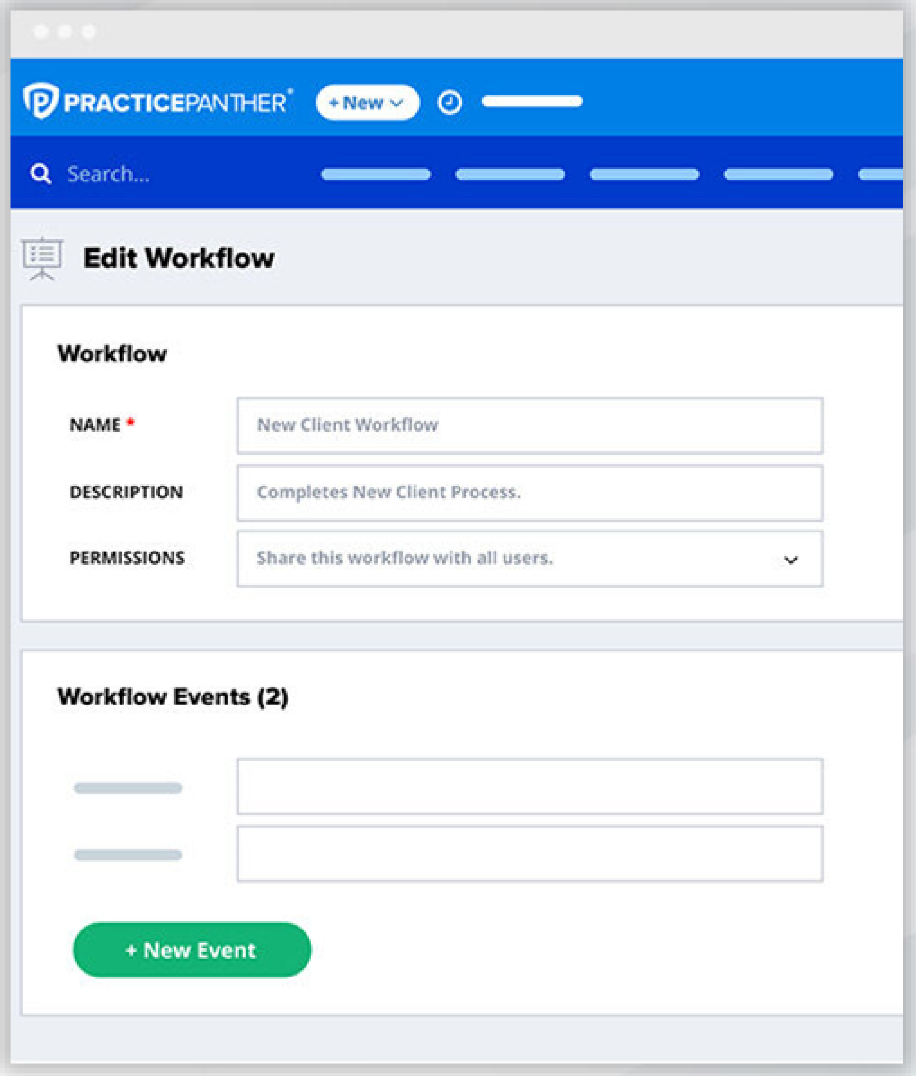
Set tasks on autopilot with custom workflows

- Automate repeat steps and create a flow of tasks that need to happen each time.

- Reduce errors, align with colleagues, and always be a step ahead with our customizable workflows.



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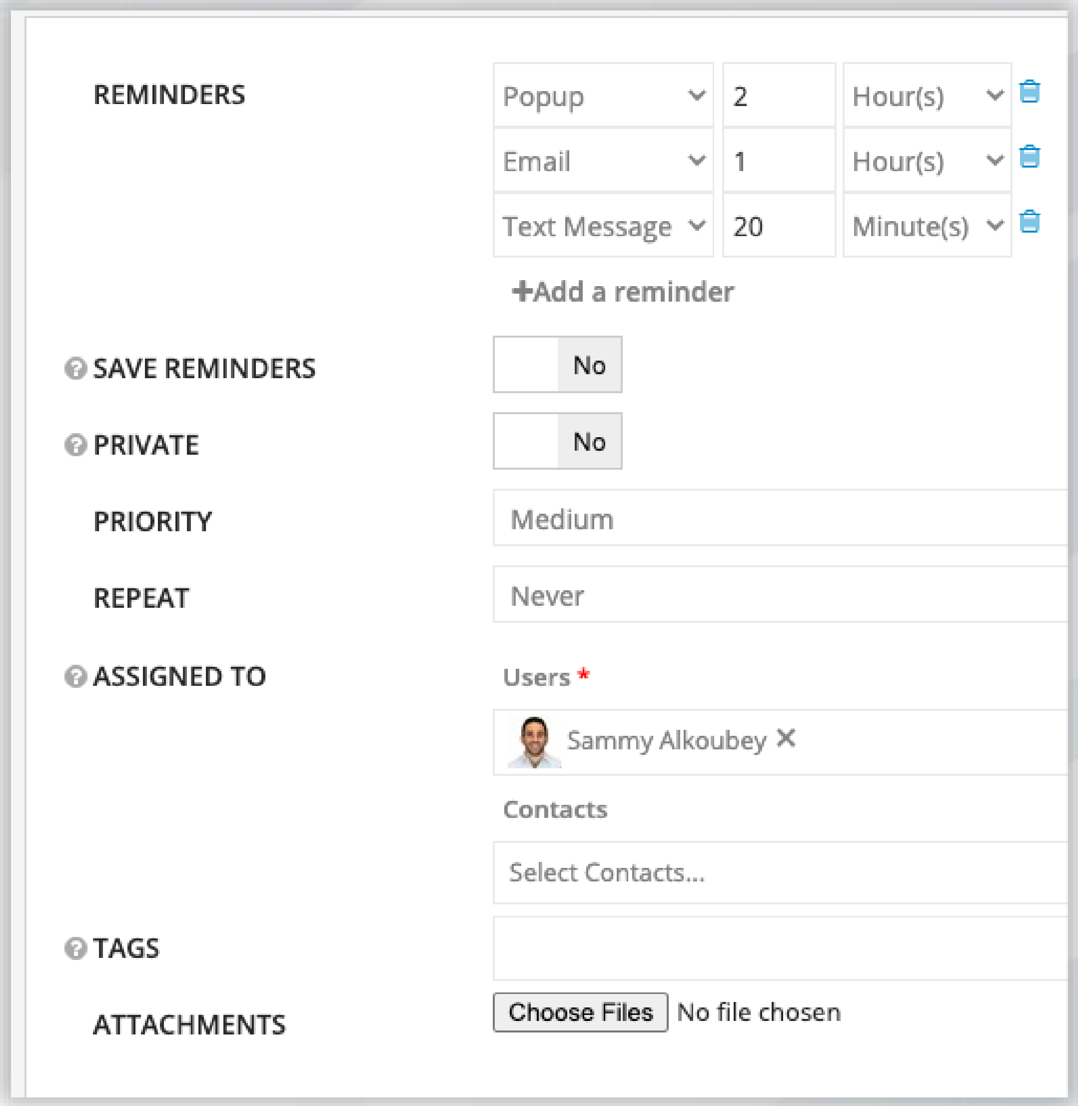
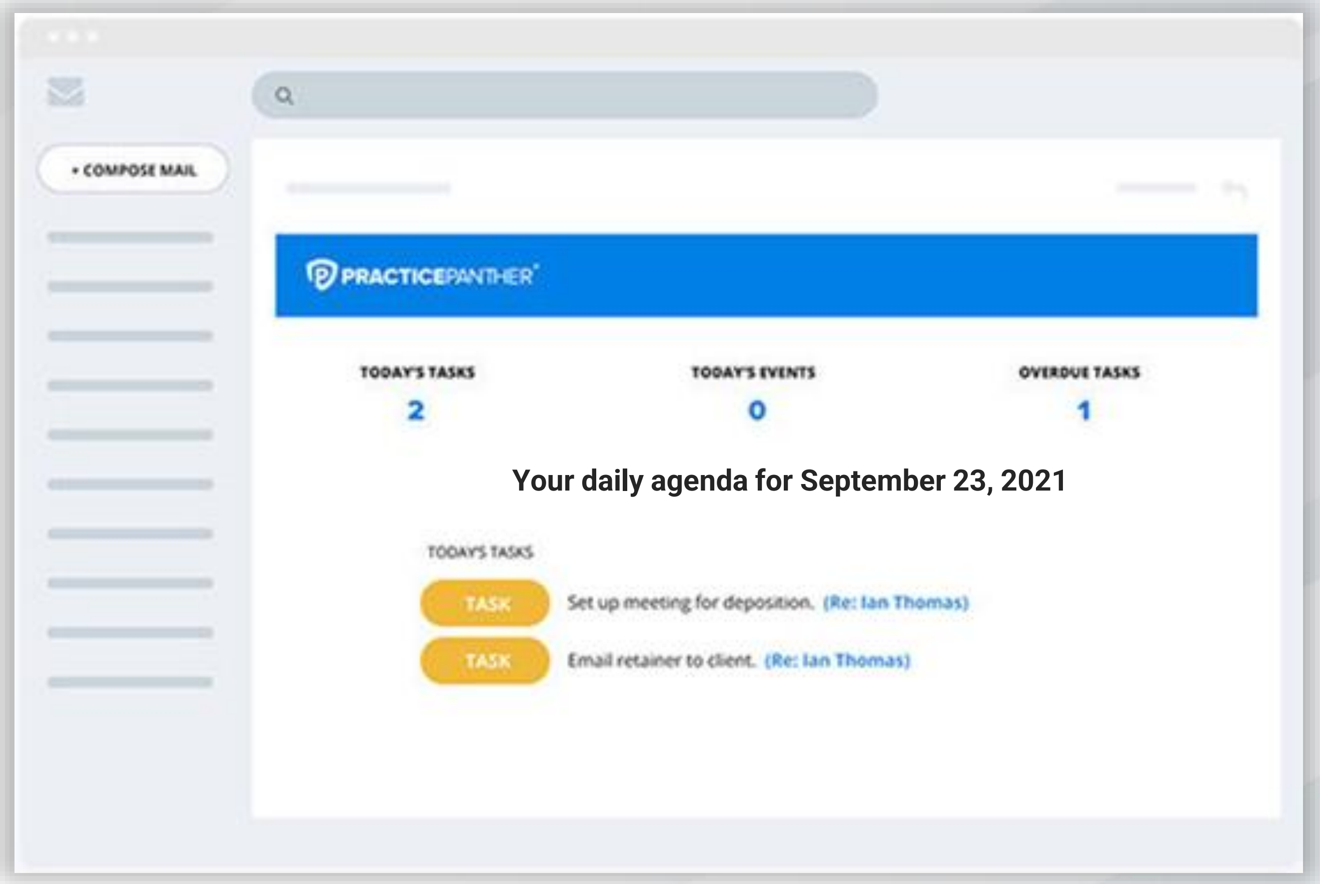
Keep reminders in PracticePanther

- Set reminders where it makes most sense for you and stay in sync with your team.
- Automate your workflows and set timed rules for your tasks.



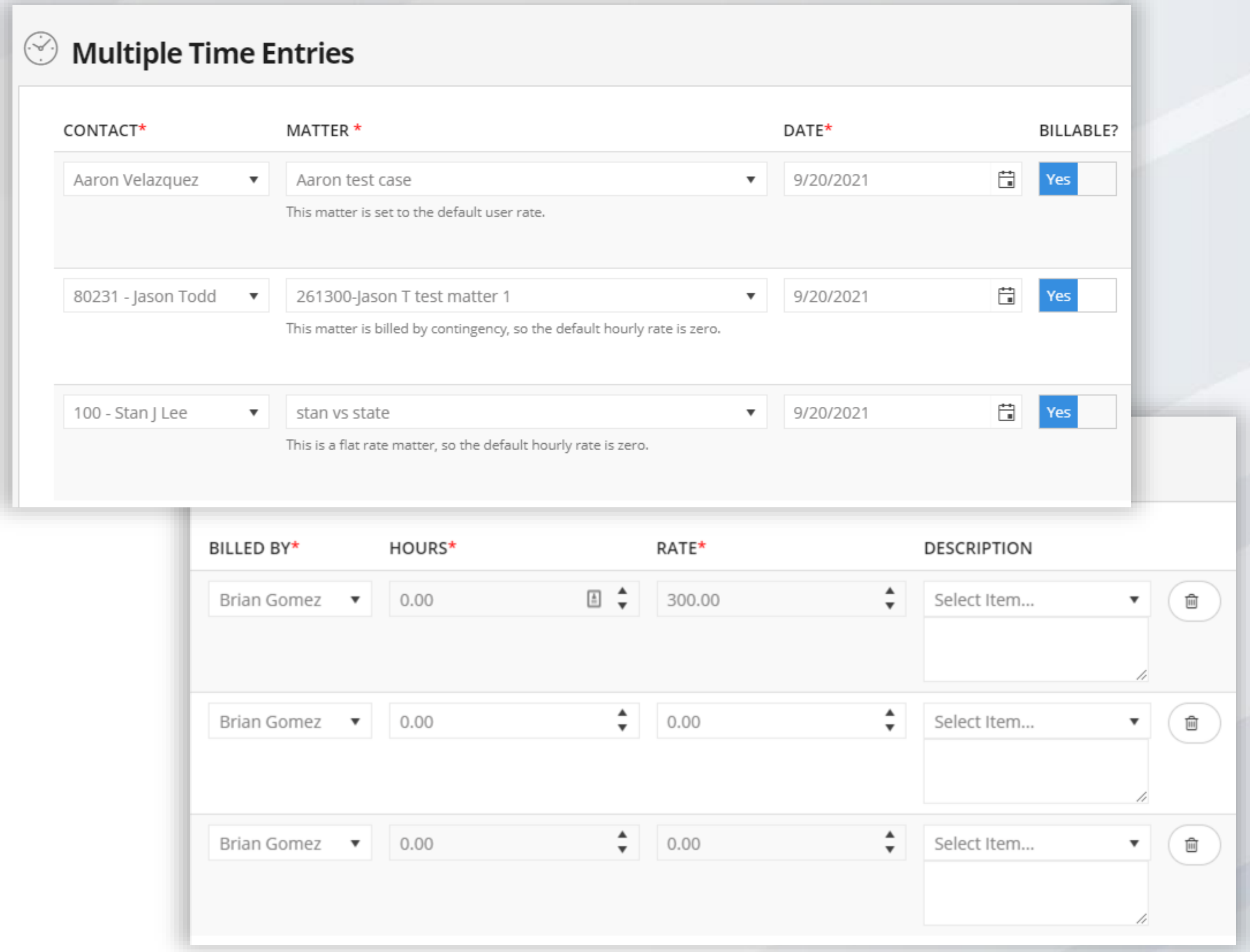
Stay on top of everything

- Receive daily agenda emails in the morning and get notifications for different tasks & events related to the case.
- Keep a pulse on what's been completed and what hasn't so you never drop the ball with your task dashboard.



Easy time entry practices

- Automated time and expense tracking helps you recover lost revenue, get paid faster, and capture more billable time.
- Don't waste valuable time looking back a week or 30 days later to document billable hours. Track and calculate your time as-it-happens from any device.
- Customize matter and hourly rates



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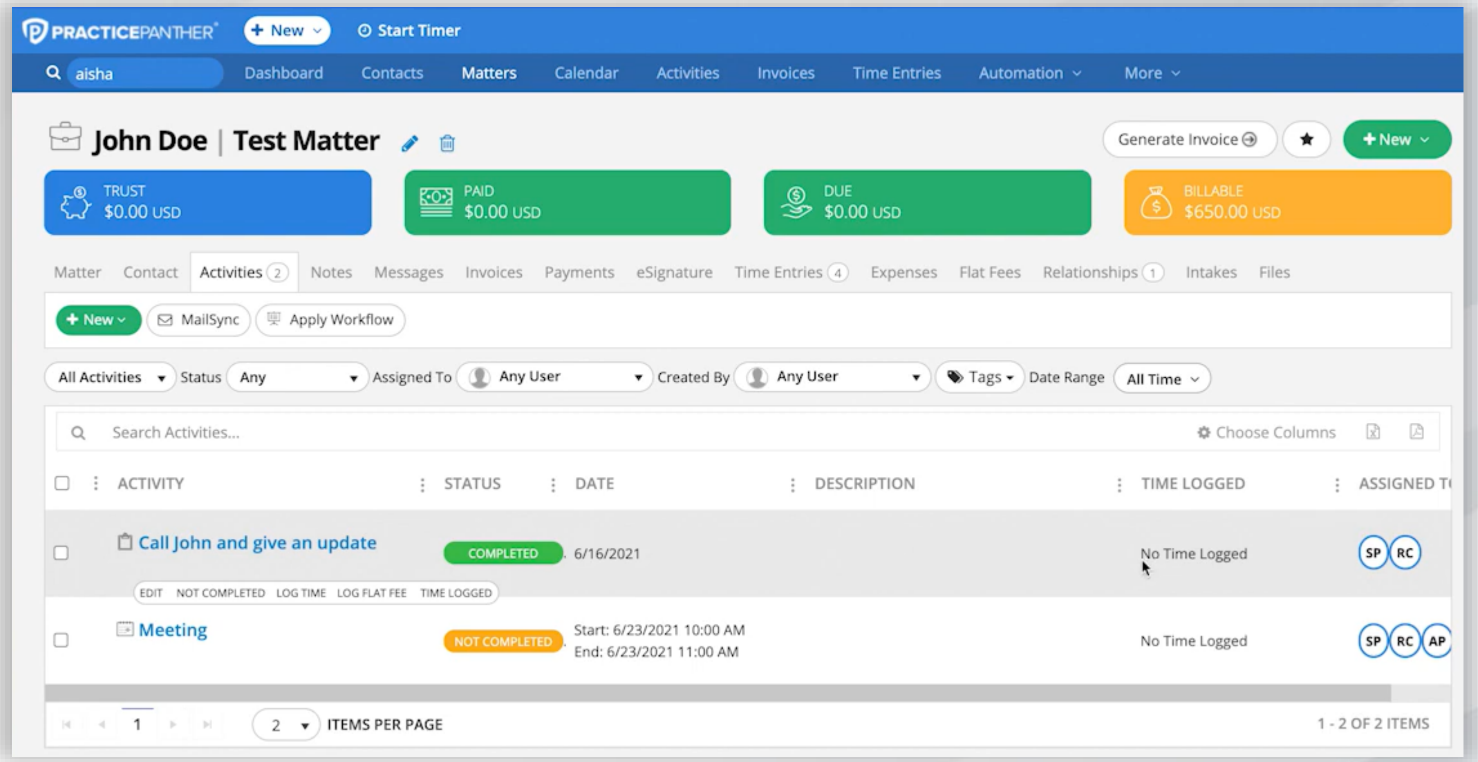
Recover lost time with the MoneyFinder Feature

- Make sure your time is logged for billable tasks your team has completed.
- Quickly view tasks to log and bill for it in seconds.
- Find 1-2 hours a week on average that would've fallen through.



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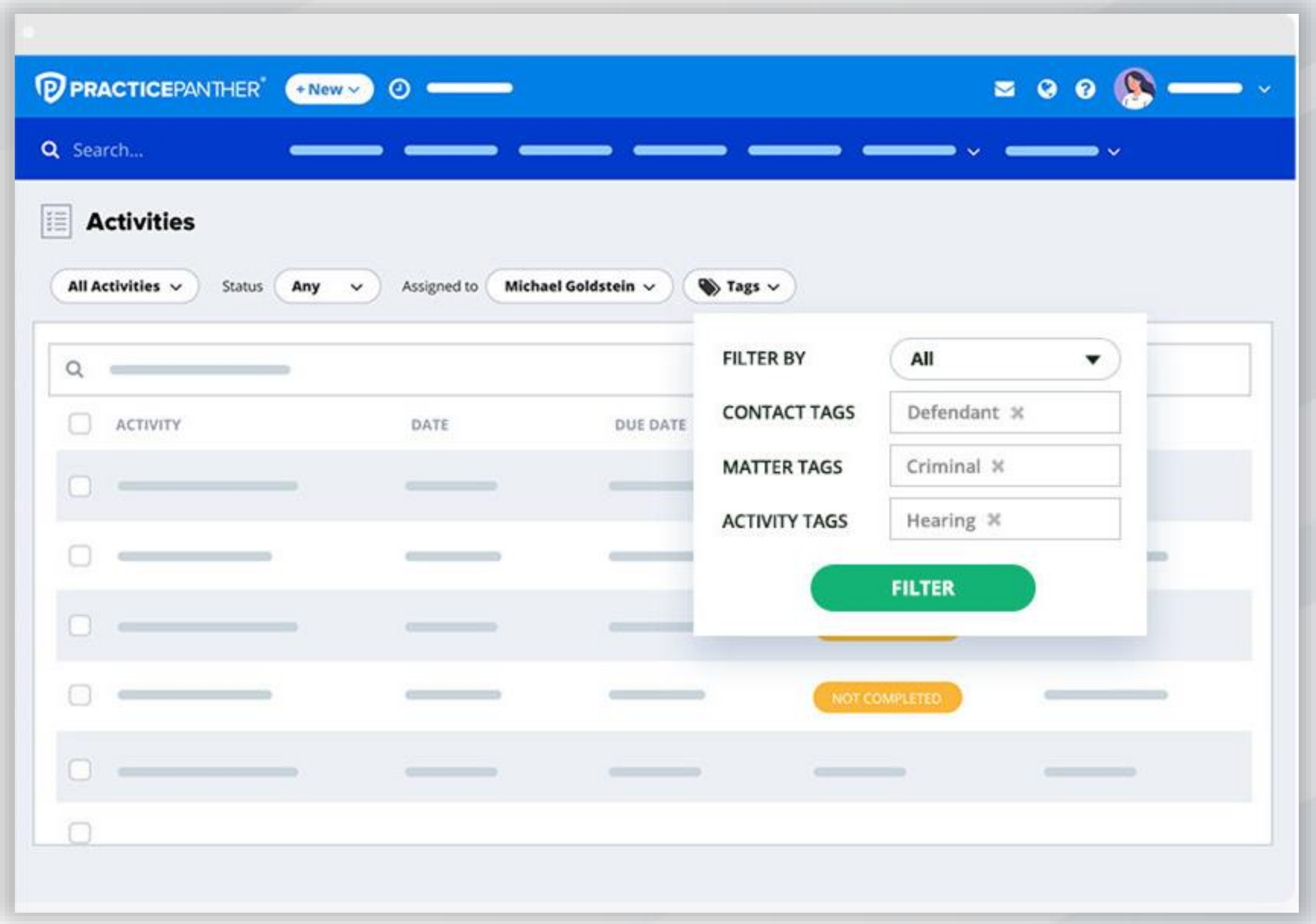
Dive into reports & tags

- Set tags on Contacts, Matters, or Activities to explore which practice areas are the busiest.
- Organize based on types of contacts (by prospects or clients, by attorney).
- Establish tags for different locations, courthouses, or jurisdictions for custom insight.



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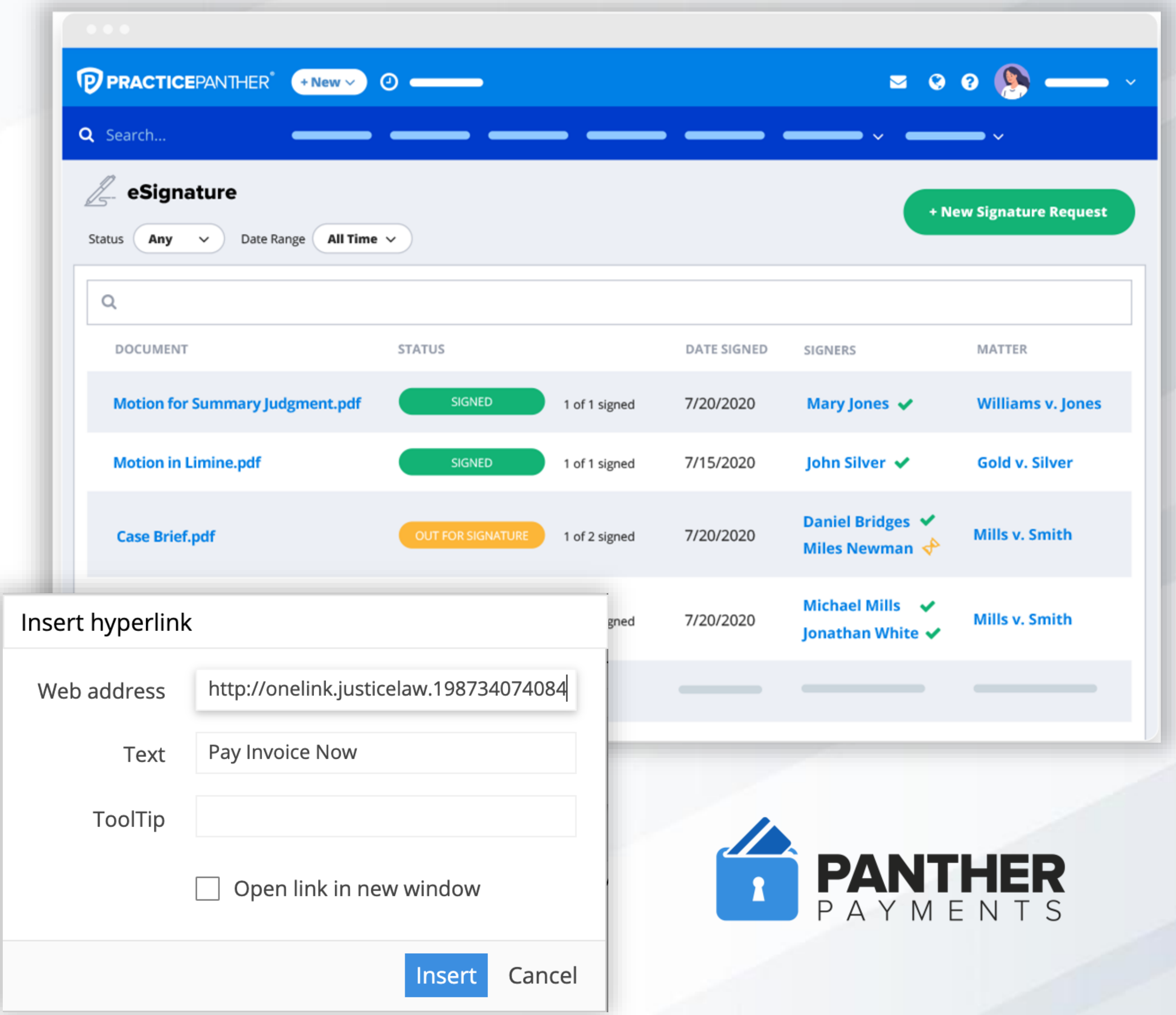
Securely send documents for signature in one place

- eSignature is a convenient way to virtually collect signatures from stakeholders.
- All of your eSign information will live in our newly designed dashboard.
- No 3rd party means added convenience at no extra charge.



PANTHER PAYMENTS

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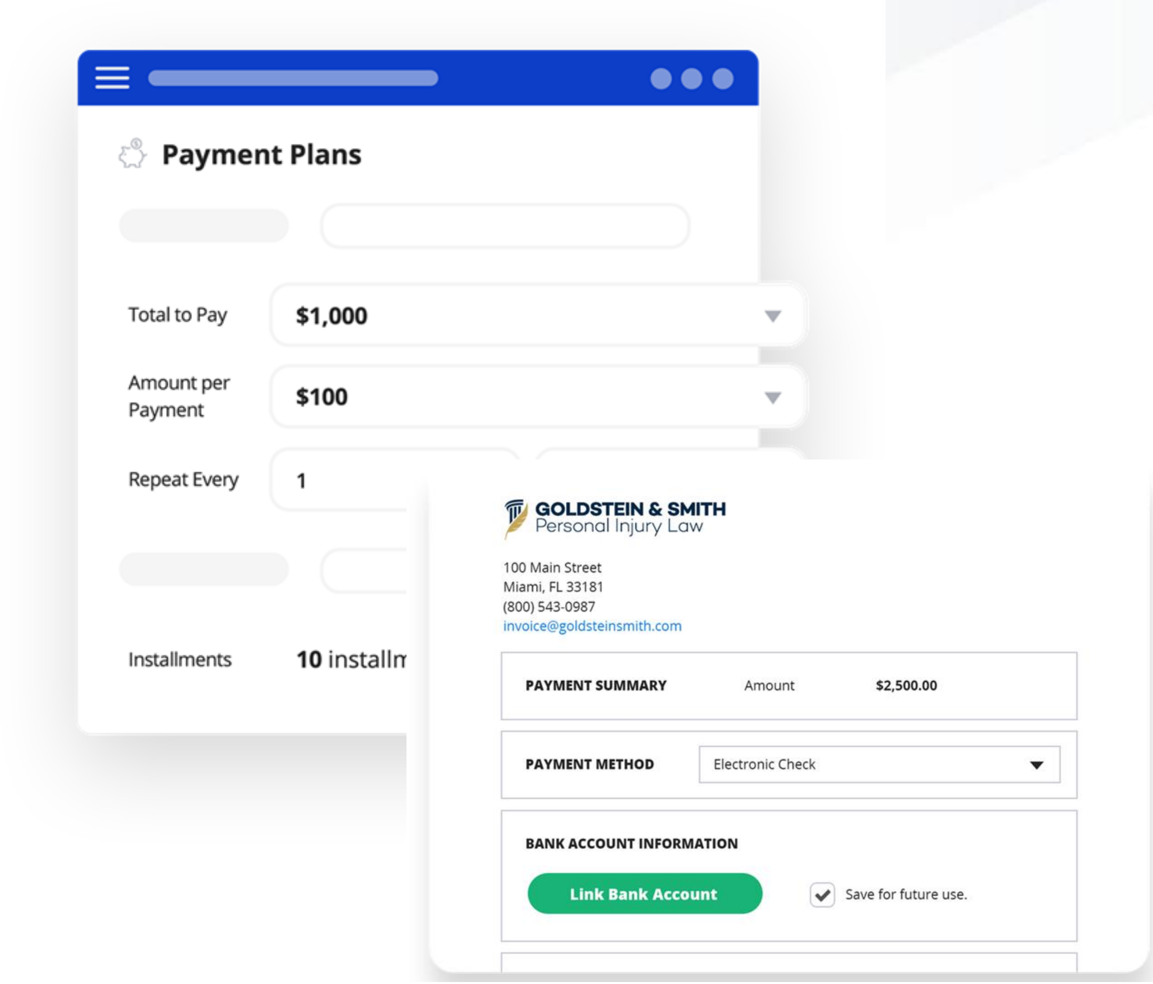
Payments processing all in one place



PANTHER PAYMENTS

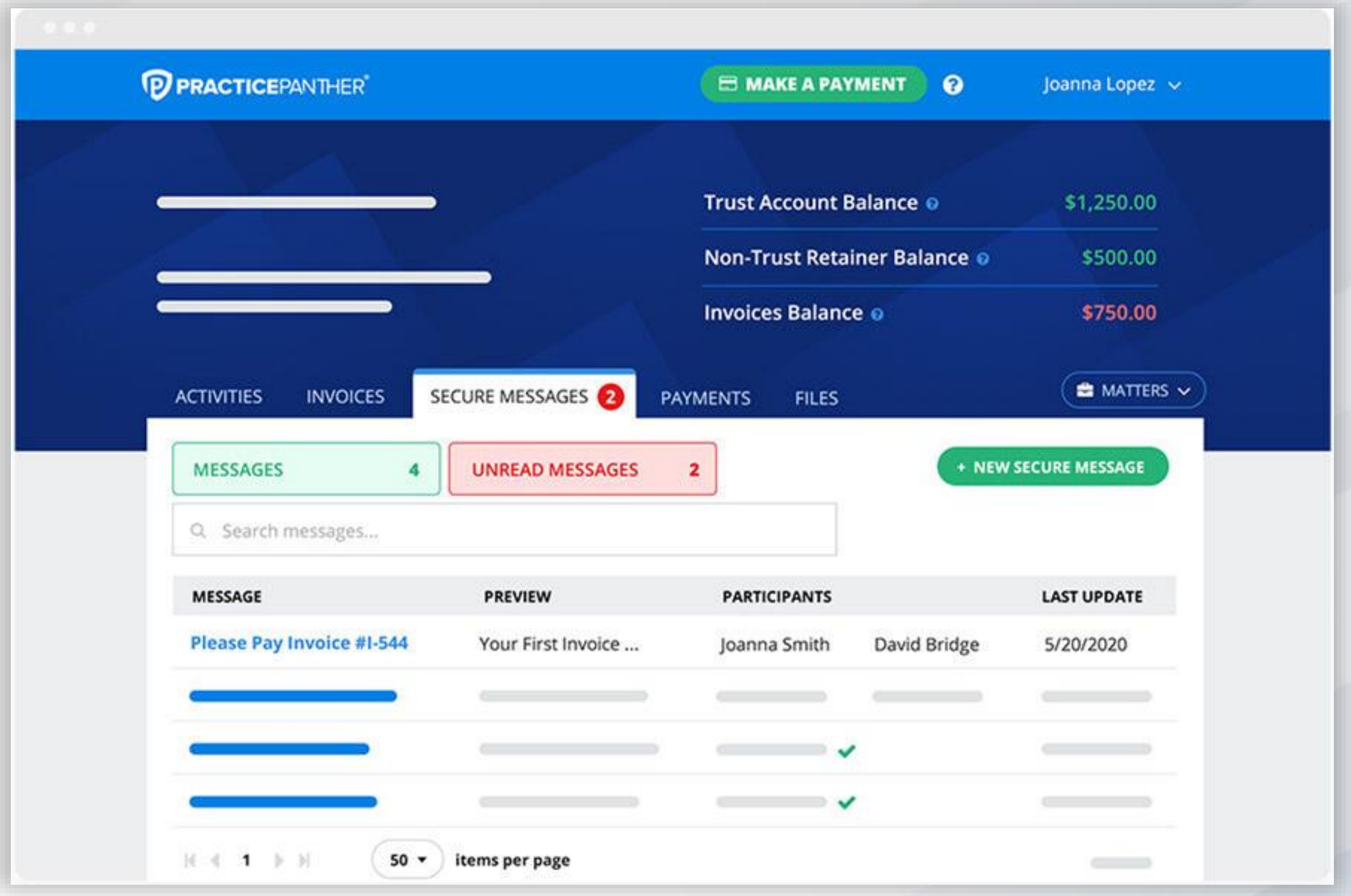
Compliantly accept all major credit card and eChecks to level up your client's payment experience with PantherPayments.

- Payment automation features
- Payment activity dashboard
- Chargeback assistance
- No processing minimums or maximums

The client portal makes it easier for you & your clients

Keep your clients up to date
Instantly let your clients know if they have a due balance, a meeting coming up, or an important update to review.

No more chasing down files
Workflow management should be a lot easier than it is. Keep it streamlined and easy for your client by sharing files and inviting them to specific tasks and events through our customer relationship management software.



Q&A

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PracticePanther.com/demo

bgomez@practicepanther.com