



ACCELERATE EFFICIENCY

# Law Firm Automation for Today's Remote Hybrid Environment

# Speaker



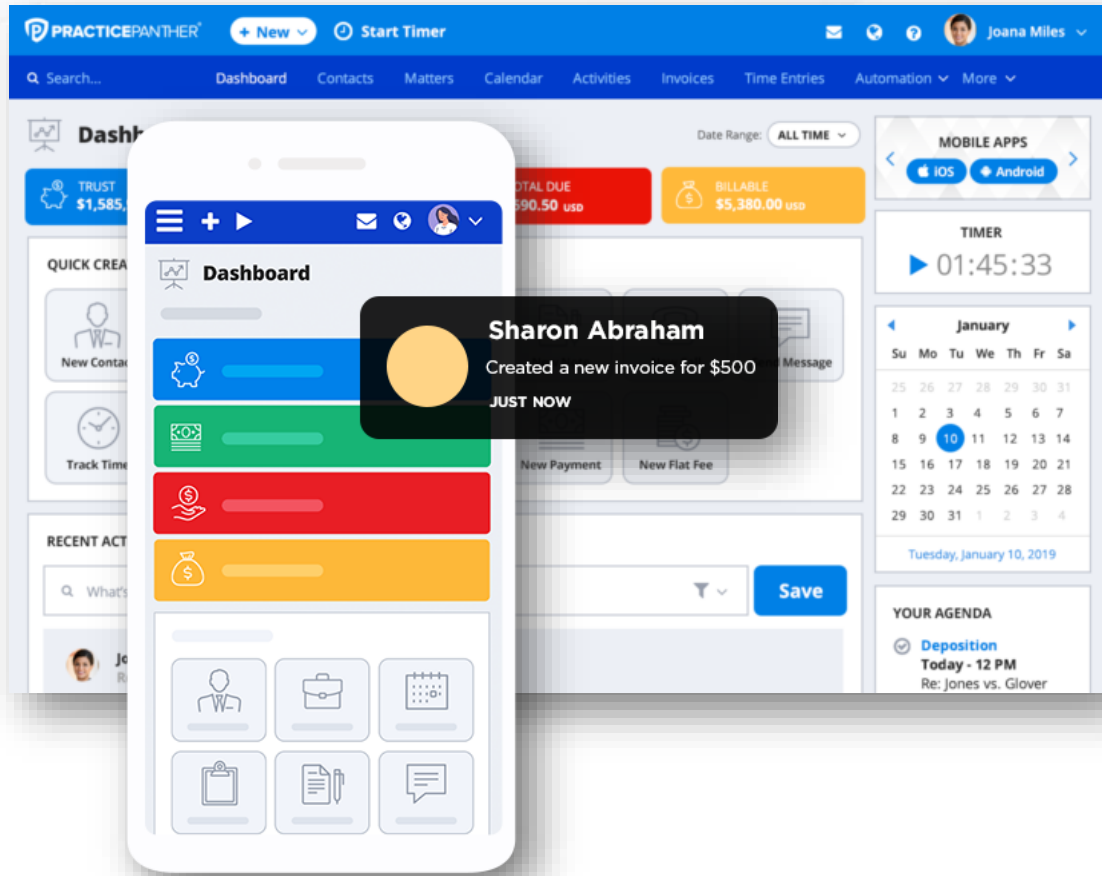
**BRIAN GOMEZ**  
Account Executive  
PracticePanther

# 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.

# Streamline intake with PracticePanther

## Fast & seamless intake process

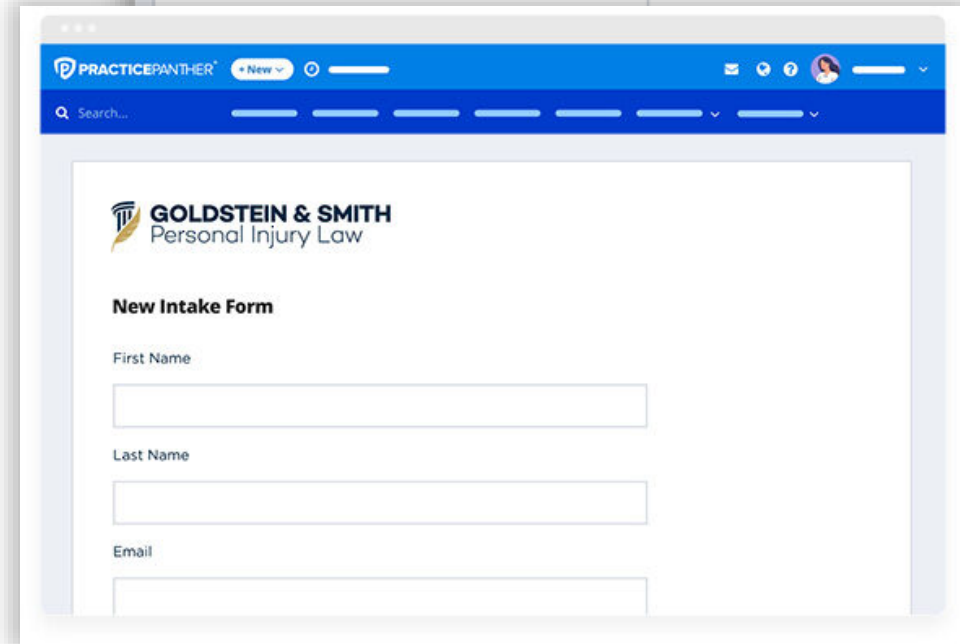
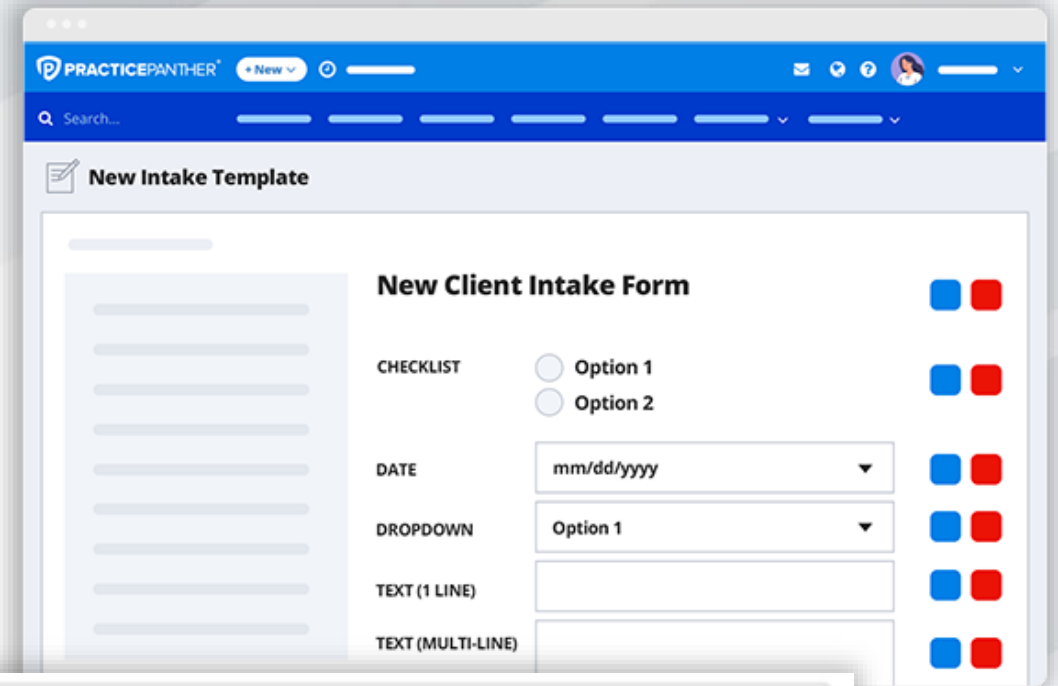
Go paperless and invite clients to fill out intake forms on your website or via an iPad in the office. No more shuffling paperwork.

## Customize the look & feel

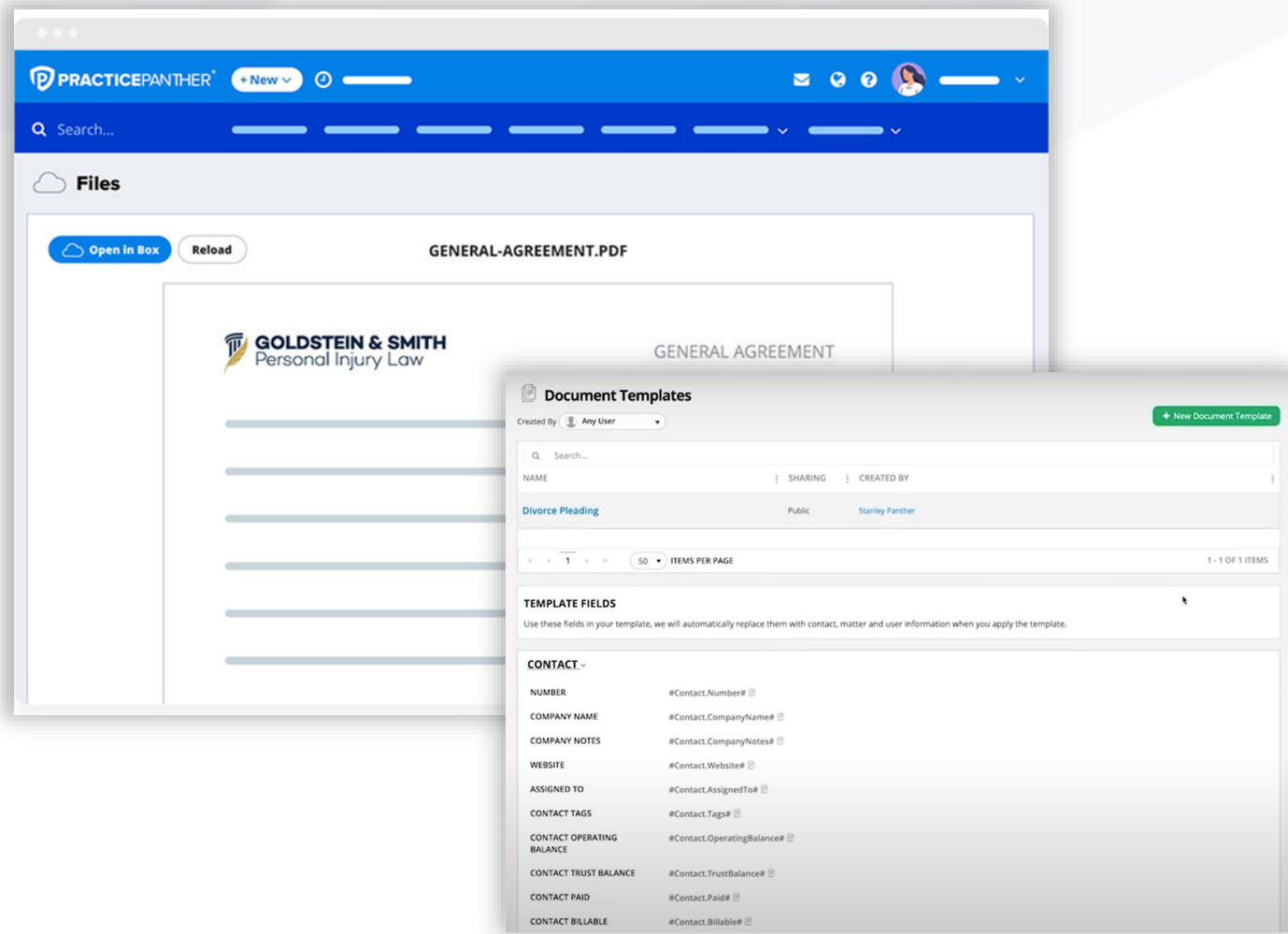
Build unlimited intake forms that reflect your firm.

## From Lead to Referral

Intake forms can be multi-functional for different stages in a case.



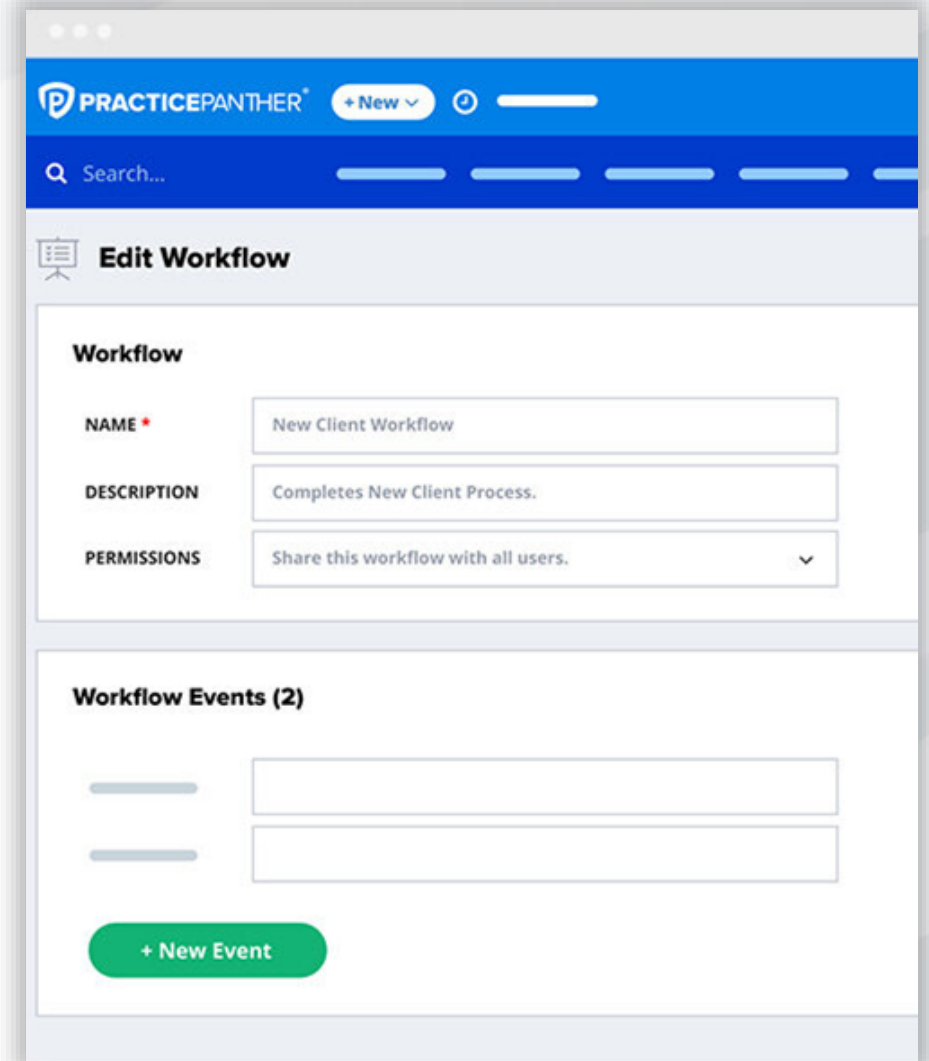
# Create custom document templates



- 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.

# 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.



The screenshot displays the 'Edit Workflow' interface in the PracticePanther application. At the top, the PracticePanther logo is visible on the left, and a '+New' button with a dropdown arrow is on the right. Below the logo is a search bar with the text 'Search...'. The main heading is 'Edit Workflow'. Underneath, there is a 'Workflow' section with three fields: 'NAME' (containing 'New Client Workflow'), 'DESCRIPTION' (containing 'Completes New Client Process.'), and 'PERMISSIONS' (containing 'Share this workflow with all users.' with a dropdown arrow). Below this is a 'Workflow Events (2)' section with two empty input fields. At the bottom of this section is a green button labeled '+ New Event'.

# 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.

**REMINDERS**

Popup	2	Hour(s)
Email	1	Hour(s)
Text Message	20	Minute(s)

**+Add a reminder**


**SAVE REMINDERS** No

**PRIVATE** No

**PRIORITY** Medium

**REPEAT** Never

**ASSIGNED TO** Users \*

 Sammy Alkoubey X

**Contacts**

Select Contacts...

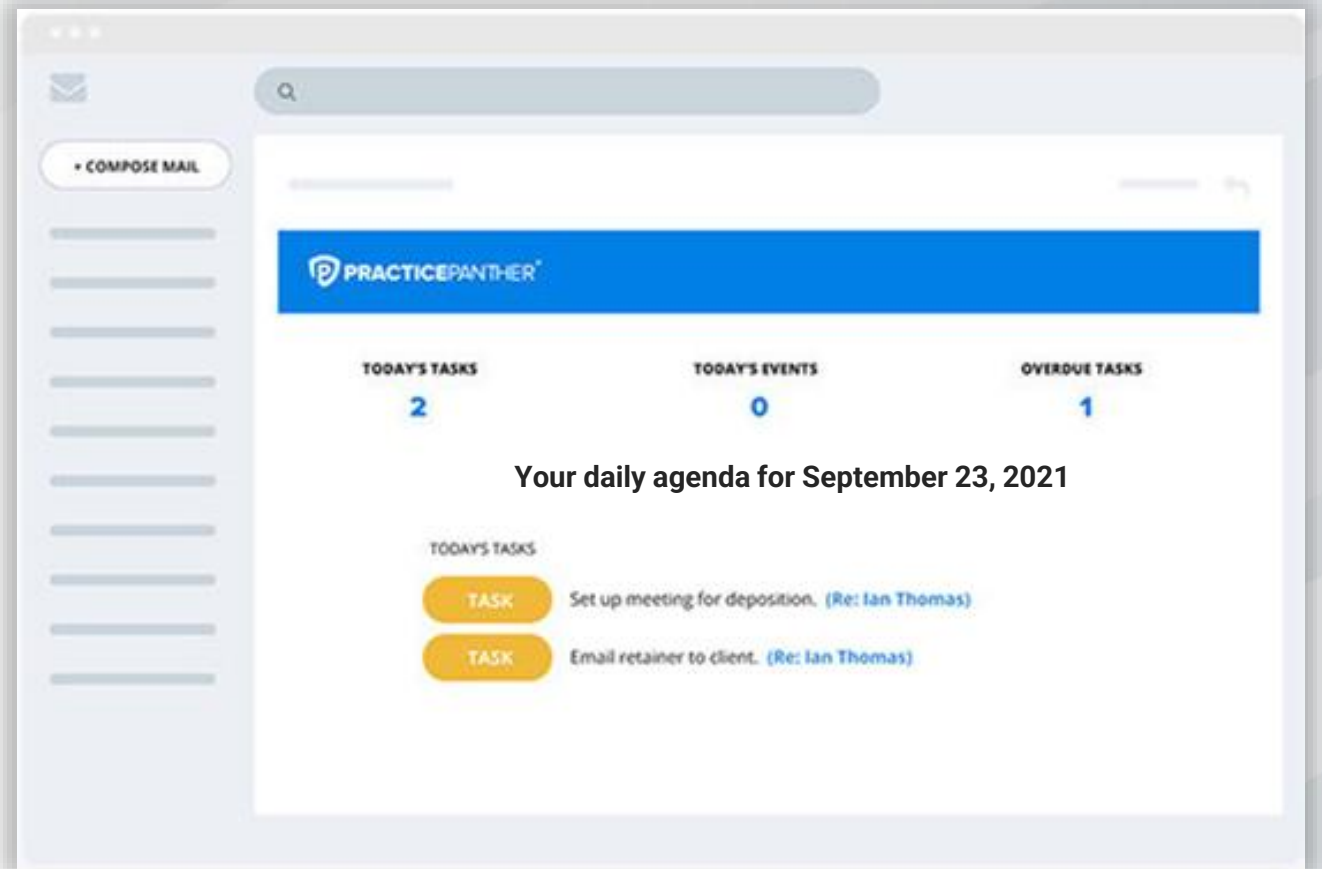
**TAGS**

**ATTACHMENTS**  No file chosen




# 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

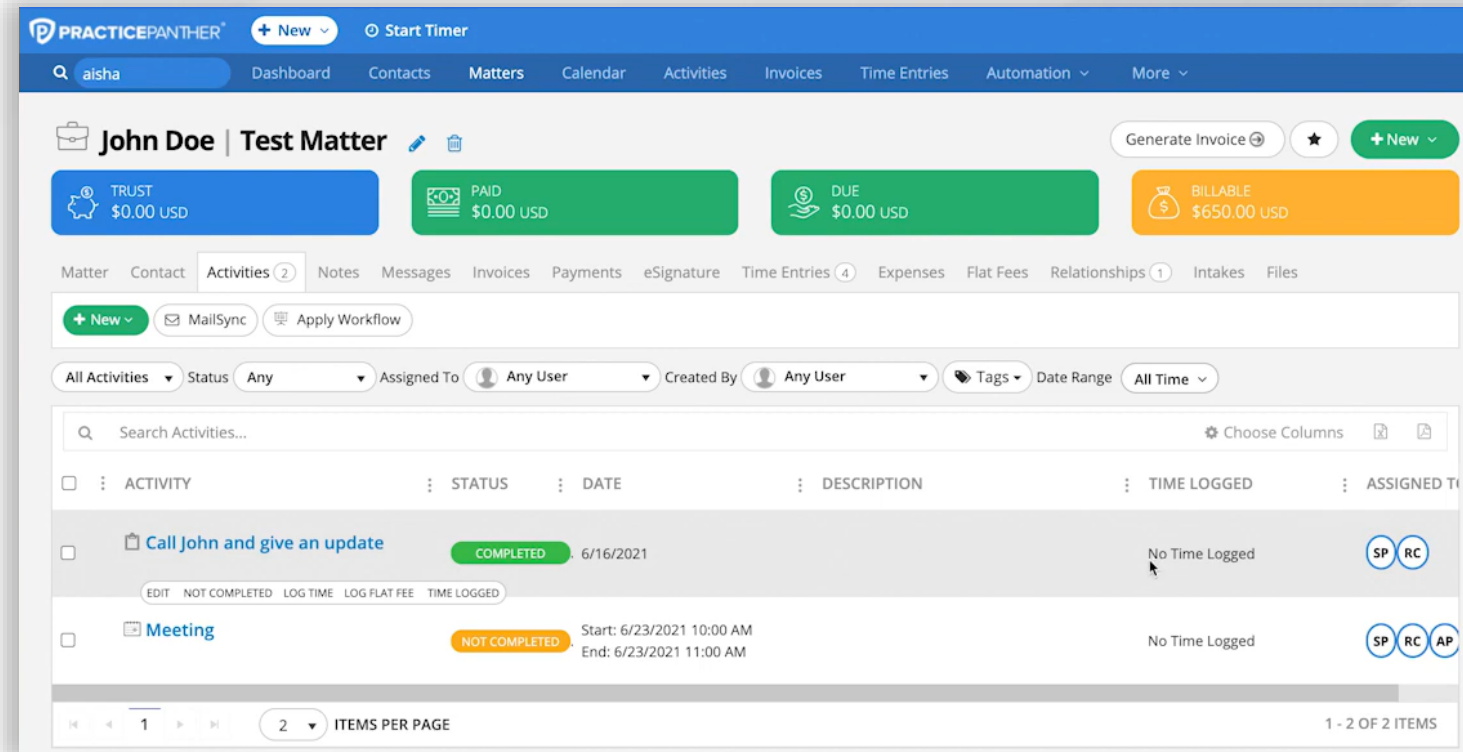
 **Multiple Time Entries**

CONTACT*	MATTER *	DATE*	BILLABLE?
Aaron Velazquez ▾	Aaron test case ▾ <small>This matter is set to the default user rate.</small>	9/20/2021 	<input checked="" type="checkbox"/> Yes
80231 - Jason Todd ▾	261300-Jason T test matter 1 ▾ <small>This matter is billed by contingency, so the default hourly rate is zero.</small>	9/20/2021 	<input checked="" type="checkbox"/> Yes
100 - Stan J Lee ▾	stan vs state ▾ <small>This is a flat rate matter, so the default hourly rate is zero.</small>	9/20/2021 	<input checked="" type="checkbox"/> Yes

BILLED BY*	HOURS*	RATE*	DESCRIPTION
Brian Gomez ▾	0.00  	300.00 	Select Item... ▾ 
Brian Gomez ▾	0.00 	0.00 	Select Item... ▾ 
Brian Gomez ▾	0.00 	0.00 	Select Item... ▾ 

# 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.

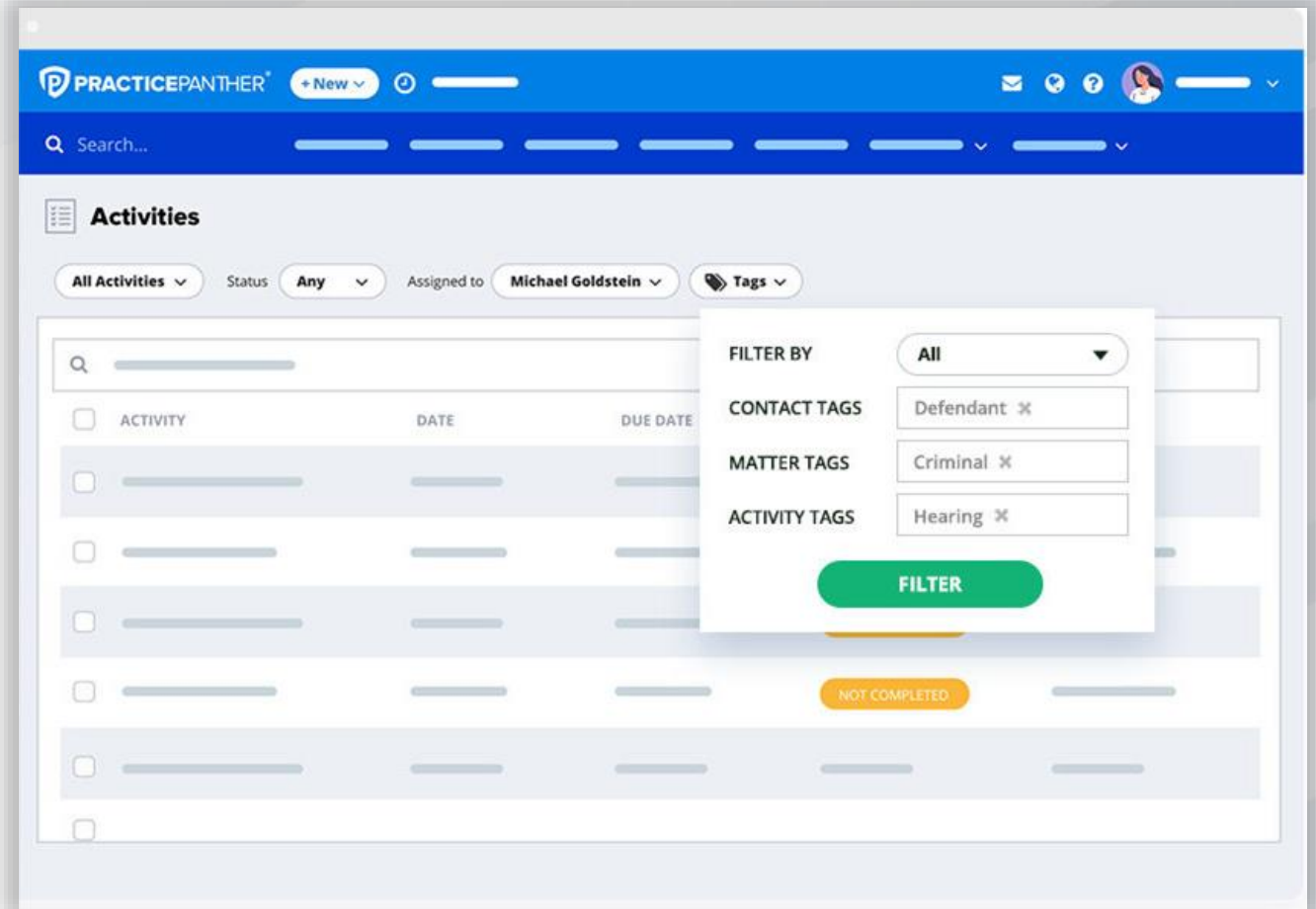


The screenshot displays the PracticePanther MoneyFinder interface for a matter named "John Doe | Test Matter". At the top, there are summary cards for TRUST (\$0.00 USD), PAID (\$0.00 USD), DUE (\$0.00 USD), and BILLABLE (\$650.00 USD). Below these are navigation tabs for Matter, Contact, Activities (2), Notes, Messages, Invoices, Payments, eSignature, Time Entries (4), Expenses, Flat Fees, Relationships (1), Intakes, and Files. A search bar and filters for Status, Assigned To, Created By, Tags, and Date Range are visible. The main table lists activities with columns for Activity, Status, Date, Description, Time Logged, and Assigned To. Two activities are shown: "Call John and give an update" (COMPLETED, 6/16/2021, No Time Logged) and "Meeting" (NOT COMPLETED, 6/23/2021 10:00 AM to 11:00 AM, No Time Logged). The interface includes a "Generate Invoice" button and a "Start Timer" button in the top right.

ACTIVITY	STATUS	DATE	DESCRIPTION	TIME LOGGED	ASSIGNED TO
Call John and give an update	COMPLETED	6/16/2021		No Time Logged	SP RC
Meeting	NOT COMPLETED	Start: 6/23/2021 10:00 AM End: 6/23/2021 11:00 AM		No Time Logged	SP RC AP

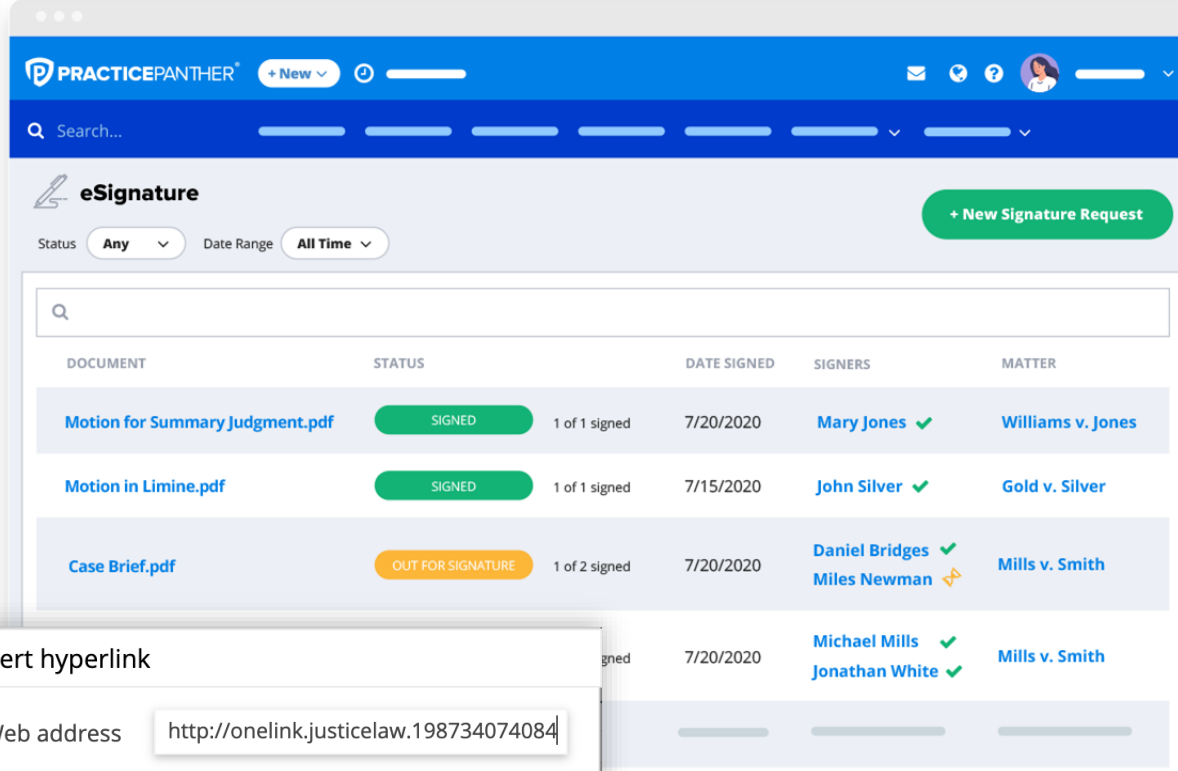
# Dive into reports & tags

- 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.



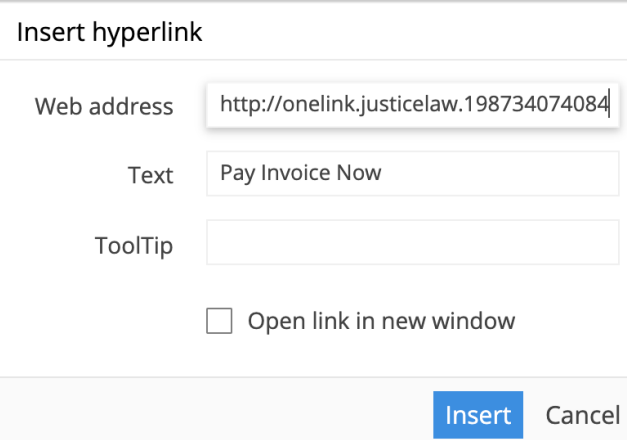
# Securely send documents for signature in one place

- 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.



The screenshot shows the PracticePanther eSignature dashboard. At the top, there's a blue header with the PracticePanther logo, a '+ New' button, and user profile information. Below the header is a search bar and a navigation menu. The main content area is titled 'eSignature' and features a '+ New Signature Request' button. A table displays a list of documents with columns for Document, Status, Date Signed, Signers, and Matter. The table contains three rows of data:

DOCUMENT	STATUS	DATE SIGNED	SIGNERS	MATTER
Motion for Summary Judgment.pdf	SIGNED	7/20/2020	Mary Jones ✓	Williams v. Jones
Motion in Limine.pdf	SIGNED	7/15/2020	John Silver ✓	Gold v. Silver
Case Brief.pdf	OUT FOR SIGNATURE	7/20/2020	Daniel Bridges ✓ Miles Newman ⚠	Mills v. Smith



The screenshot shows a dialog box titled 'Insert hyperlink'. It contains the following fields and options:

- Web address:
- Text:
- ToolTip:
- Open link in new window
- Buttons: **Insert** and **Cancel**



# Payments processing all in one place



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

A screenshot of the Panther Payments "Payment Plans" configuration interface. It features a blue header with a hamburger menu icon and three dots. Below the header, there are several input fields: a search bar, a "Total to Pay" dropdown menu set to "\$1,000", an "Amount per Payment" dropdown menu set to "\$100", a "Repeat Every" dropdown menu set to "1", and an "Installments" field set to "10 installm".A screenshot of the payment processing form for Goldstein & Smith, Personal Injury Law. The form includes the firm's logo and contact information: "100 Main Street, Miami, FL 33181, (800) 543-0987, invoice@goldsteinsmith.com". Below this, there is a "PAYMENT SUMMARY" table with columns for "Amount" and "Amount" showing "\$2,500.00". The "PAYMENT METHOD" is set to "Electronic Check". The "BANK ACCOUNT INFORMATION" section includes a green "Link Bank Account" button and a checked checkbox for "Save for future use."

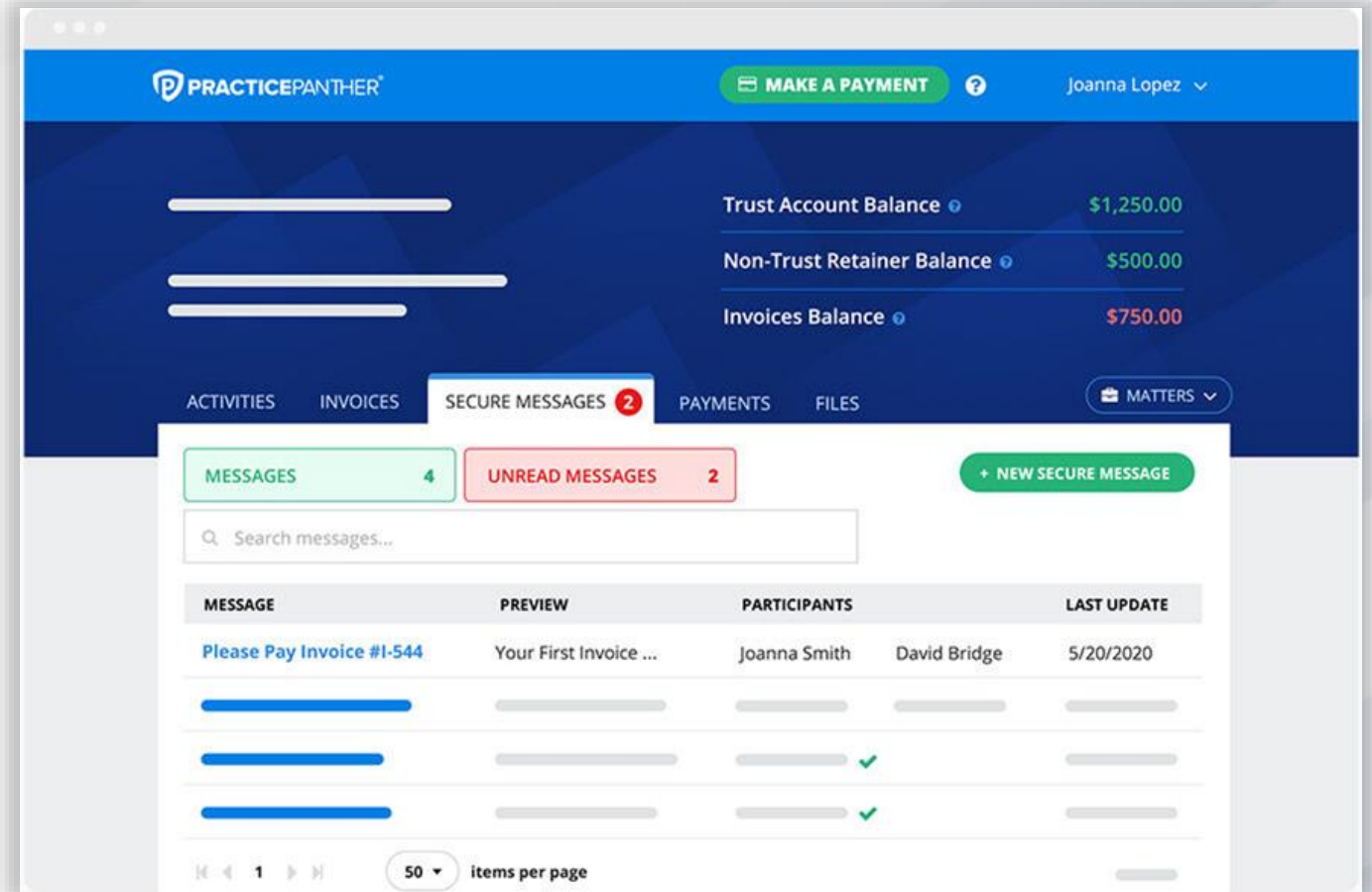
# The client portal makes it easier for you & your clients

## 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



[PracticePanther.com/demo](https://PracticePanther.com/demo)

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