

LegalTech PUBLISHING

IN PARTNERSHIP WITH ABOVE THE LAW

PRACTICE MANAGEMENT

BUYER'S GUIDE: 2024 EDITION

Filevine

Filevine's Future is Supercharged with AI, Transforming How Attorneys Work

> **"Filevine tracks every action in a project in the activity feed. Team members can communicate through comments and records and follow details such as who completed an activity and when. Having all this information in one location facilitates information sharing and makes it simple to stay informed about a case."**

Company Name Brand
Filevine

Product Name Brand(s)
Filevine

Latest Developments and Updates

- The first step toward providing Filevine users with an AI virtual assistant tool is SidebarAI. The support tool offers summaries of the most recent developments in a case project and responds to "how-to" queries to assist users in navigating the Filevine platform.
- AIFields helps law firms looking to analyze documents more efficiently, conduct fact-checking more quickly and accurately, and drastically reduce the number of human hours required to comb through pertinent case documents and files. All of this can be done securely, directly from within Filevine.
- Filevine Payments allows firms to accept ACH, credit card, and debit card payments and to track, automate, and customize payment collection.

Improve Collaboration and Focus
The concept that information grows in a case, like how leaves grow on a vine, is the source of the name Filevine. Filevine's leaves centralize documents, tasks, emails, and more, relieving users of the need to remove these leaves from multiple places and apps. Attorneys and paralegals easily collaborate within the firm with Filevine's one platform, which gives them access to all their leaves in one location.

Filevine leverages the power of artificial intelligence (AI) to streamline the legal process from client intake to billing. The platform offers several AI-powered features that automate tasks, free up

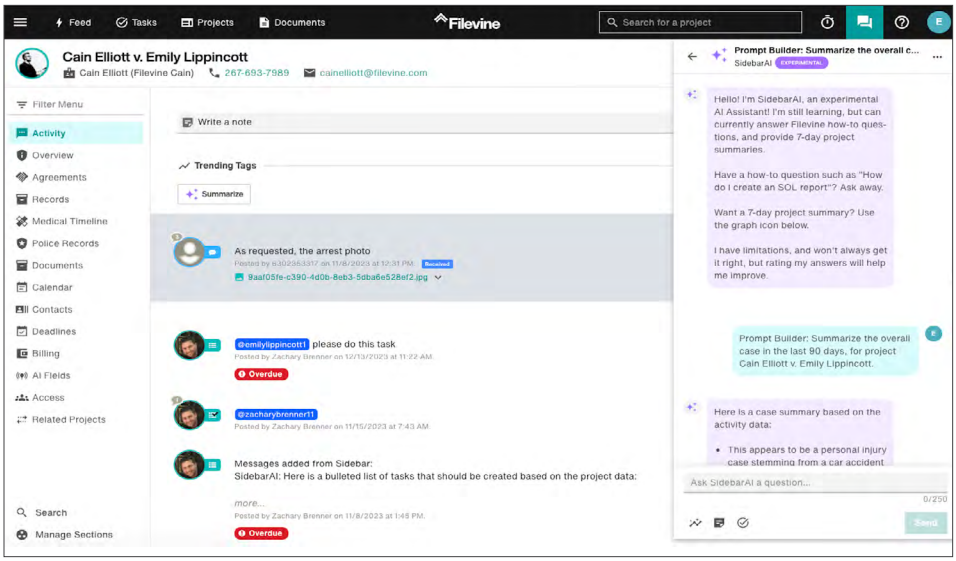


Figure 1: Users will find they spend a lot of time on the Activity Feed, including SidebarAI, which contains key case information. The center panel displays the key communications among team members as well as the client. On the right side of the screen, the powerful SidebarAI is displayed, providing users with assistance for their case.

> SidebarAI is an AI-powered chatbot designed to facilitate communication and help users navigate the Filevine platform successfully and quickly. It can offer advice, condense situations, and instantly respond to "how-to" queries."

lawyers to focus on more important activities, and transform how lawyers work.

Lead Docket
Lead Docket is an efficient lead intake management solution with automatic processes to guarantee each lead is promptly followed up, and tasks are clearly defined. It also helps manage and retain leads. LeadsAI, developed by Filevine, allows teams to manage leads from any marketing source in one location easily. It features lead summaries and predictive analysis to streamline and accelerate legal intake and lead management. The AI-powered function creates a well-written synopsis of all data entered in a lead intake form, empowering intake teams to make judgments more quickly and efficiently. Additionally, LeadsAI predictive analysis for MVA (motor vehicle accident) helps determine whether a new lead should be signed, directed out, or rejected, eliminating guesswork in case qualification. An AI-powered fee prediction for possible scenarios provides vital information in determining whether a case would benefit the firm.

Workflows and Activity Feeds
A firm can customize workflows inside Filevine to follow its procedures for every stage of a project or case, ensuring no processes are overlooked. Filevine can use each job to start a workflow's subsequent task. For instance, an engagement letter is generated and made available for the user to edit as soon as the prospective client is accepted. Filevine's automation feature presents the subsequent task in the workflow as each step or task is completed, taking into account the outcomes of the previous action.

Filevine tracks every action in a project in the activity feed. Team members can communicate through comments and records and follow details such as who completed an activity and when. Having all this information in one location facilitates information sharing and makes it simple to stay informed about a case. The communications, tasks, and documents in a case (the leaves) appear in the feed as they are created. Additionally, users have access to SidebarAI for additional information and insight.

SidebarAI
SidebarAI is an AI-powered chatbot designed to facilitate communication and help users navigate the Filevine platform successfully and quickly. It can offer advice, condense situations, and instantly respond to "how-to" queries. SidebarAI can present summaries of every case, topic, or project's activities during the previous seven days. To utilize SidebarAI, click the message symbol in the upper right corner of the screen, then click SidebarAI to initiate a new message conversation. Type your query into the text field and select Send; SidebarAI will look through the Help Center and provide the pertinent details in its response. *See Figure 1 on the previous page*.

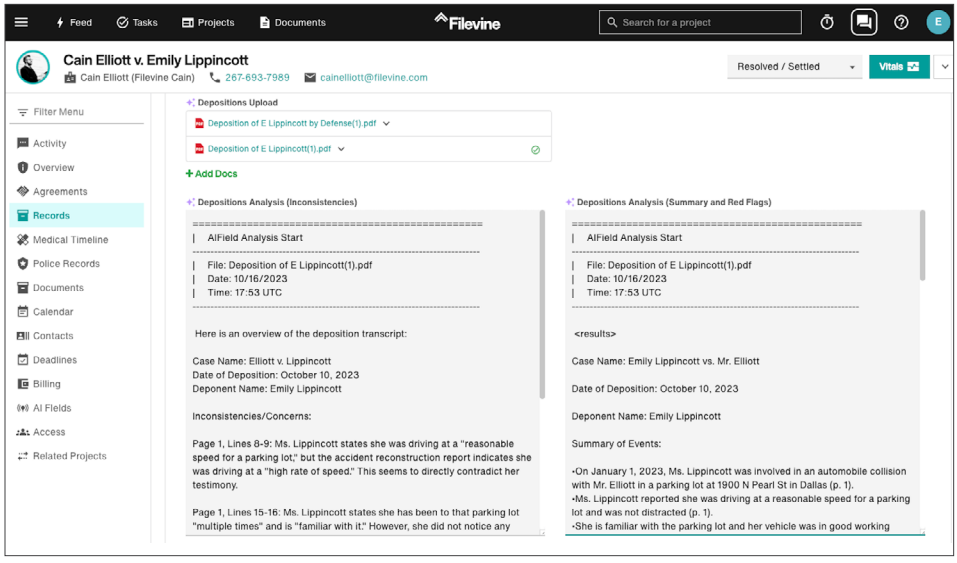


Figure 2: AIFields can show inconsistencies in documents and depositions, highlighting areas needing attention for a case. The example above shows discrepancies between a witness statement and an accident reconstruction. This process takes mere minutes compared to hours of a team member's time culling through documents.

“Businesses may accept ACH, credit card, and debit card payments to help streamline billing and payment collection, thanks to Filevine Payments. Through a link included in an invoice, clients can pay invoices online. Payments are applied immediately to the client’s account, and invoice statuses are updated instantly.”

In addition to SidebarAI, Filevine has introduced **AIFields, which uses the power of artificial intelligence** to extract and organize information from documents. It mines various information and can generate summaries from the case file based on a list of analysis types. The extracted information in AIFields can be pulled into reports or referenced in **generated documents**, just as other fields can. Use AIFields to summarize cases, provide tips, list potential inconsistencies or falsehoods in deposition testimony– including the page of the text and line, and create a chronological list of pain scores from a medical record. *See Figure 2 on the previous page*.

ImmigrationAI

ImmigrationAI is designed to streamline the immigration process by automating tasks, reducing typical errors, and ensuring accuracy. ImmigrationAI scans and obtains key details from client documents, compiles crucial information, assists in completing USCIS forms, and tracks a client’s form completion progress. To use ImmigrationAI, simply upload client documents to the platform, and the tool automatically scans and extracts the necessary information. This feature is especially useful for businesses, individuals, and families who need to be sponsored or immigrate to the United States. *See Figure 3*.

Filevine Payments

Businesses may accept ACH, credit card, and debit card payments to help streamline billing and payment collection, thanks to Filevine Payments. Through a link included in an invoice, clients can pay invoices online. Payments are applied immediately to the client’s account, and invoice statuses are updated instantly. Lead intake, case and issue management, document assembly, e-signatures, contract administration, data analytics, **time tracking, billing, and payments** are all included in Filevine’s extensive range of natively created products.

Integrations

In addition to tight integration with Microsoft Office, Filevine offers an open API and plays well with other applications, allowing users to customize Filevine as a single location for daily tasks. The most common integrations include Zapier, Slack, and Google (calendar, Gmail). Filevine’s integration with DOMO provides access to reports that will drive efficiency across all matters.

Security

Filevine approaches security methodically and proactively. The team employs audits, penetration testing, privacy and vulnerability assessments, and incorporates security training and certifications, backups, and disaster recovery/business continuity and incident response planning.

Pricing

Timekeeping, billing, and payments are all included in Filevine licenses, along with cloud-based case and task management, scheduled reports, automated workflows, calendaring, team collaboration tools,

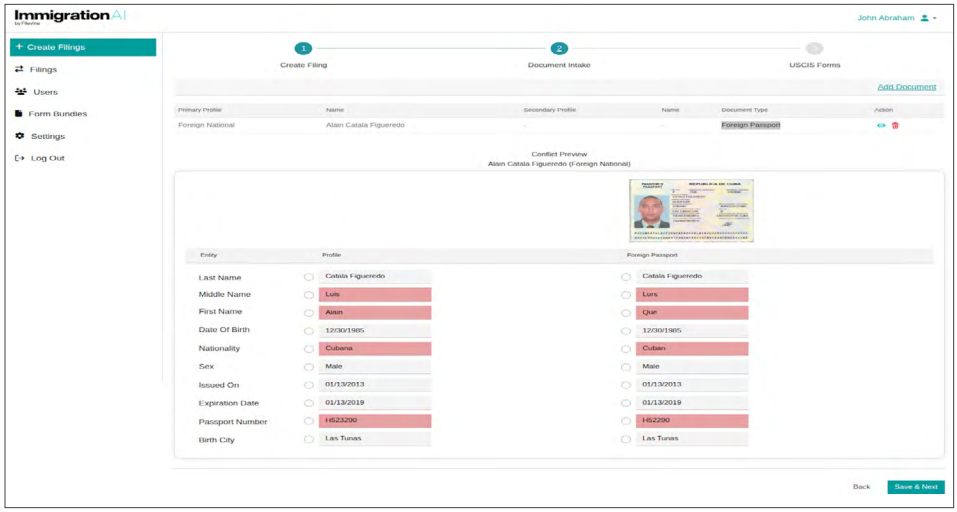


Figure 3: ImmigrationAI has streamlined the onerous process of filling out all necessary documents for immigration legal work, eliminating inconsistencies and errors that tend to prolong the process.

unlimited document storage, contact management, guest access, instant email or text communication, enterprise-level security, and powerful integrations. More modules are offered for an additional cost. For detailed pricing and further details, please contact Filevine.

Who is Filevine?

Filevine is changing the way legal work gets done for law practitioners and their clients. As a leading legal operating system, Filevine is dedicated to empowering organizations with tools to simplify and elevate complex, high-stakes legal work. That is why Filevine now offers a full suite of AI-powered solutions custom-built with the legal user in mind. Powering everything from lead intake and e-signatures to document assembly and case management, timekeeping, billing, payments, and business analytics, over 3,400 law firms and legal teams use Filevine daily to deliver excellence. Filevine is recognized on the Deloitte Technology Fast 500 and Utah Business Fast 50 lists, is a Top Workplace USA winner, and is among the fastest-growing companies on the 2023 Inc. 5000 list.

Why Buy Filevine?

- Payments by Filevine enables a firm to accept ACH, credit card, and debit card payments, and clients can quickly pay invoices via a link, which is applied directly to the proper account and updates payment status automatically.
- Combining automated workflows with collaborative document creation makes Filevine a powerful tool for law departments and firms to get more done in a fraction of the time.
- Improve turnaround time for converting leads to clients.
- Make data-driven decisions on individual cases as well as a management strategy.

See Filevine Today!

Find out more about Filevine by **scheduling your demo today!** And learn how Filevine can impact your business through our many **podcasts, blogs, white papers, and more.** ■

Thank you for reading, let's keep in touch!

We appreciate the time you spent researching solutions for your law firm. New products, feature updates, and announcements happen throughout the year. To ensure you stay well-informed, Legal Tech Publishing provides independently written Product Reviews for a variety of legal tech categories. Subscribe to receive notifications when a new guide is released. Follow us on the channels below for updates and special virtual events.


Subscribe to our Vimeo Channel


Follow us on Twitter


Like us on Facebook


Follow us on LinkedIn



This buyer's guide is supported by vendor sponsorships. The products and services selected for the guide are done at the author's discretion. Reviews are also written to reflect the opinion of the author. Each product or service must first be selected for the guide, then invited for inclusion before sponsorship is requested. Additionally, emerging technologies who do not have funding to pay for sponsorship are included based on the level of value they offer to law firms. All sponsorship proceeds go towards the costs associated with the production and distribution of the guide.

legaltechpublishing.com