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# **PRACTICE MANAGEMENT**

**BUYER'S GUIDE: 2024 EDITION**

# ZenCase’s Intuitive and Customizable Software Solves Complex Problems and Accomplishes the Most Work with the Least Effort

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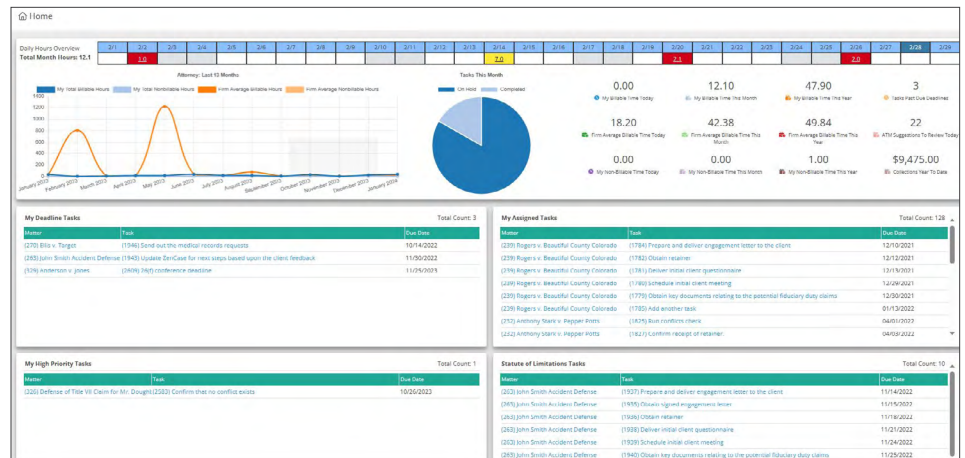
- Company Name Brand**  
Groundswell Productivity Solutions, LLC, d/b/a ZenCase
- Product Name Brand(s)**  
ZenCase
- Latest Developments and Updates**
  - Use generative AI (artificial intelligence), ZenGPT, which incorporates ChatGPT, to create documents and conduct legal research to save time and increase firm productivity.
  - Trust account reconciliation compares trust general ledgers, client ledgers, and bank statements within ZenCase.
  - Use multiple categories to organize document automation blueprints and save and apply custom filters to find them quickly.
  - Set percentage for originators’ fee allocation as general business rules with matter-specific overrides.

**Overcome Daily Challenges**  
ZenCase cloud-based law practice management (LPM) software helps law

firms overcome daily challenges, grow, and become successful. The software-as-a-service (SaaS) is intuitive, easy to use, and customizable. Core features include case and contact management, project management, knowledge management, time and billing, and expense tracking. ZenCase helps lawyers more effectively capture time, reduce errors, and improve data accuracy with document and workflow automation and automated time management.

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

The ZenCase user interface (UI) applies a single-click rule where most actions provide results in one mouse click to reduce effort and time. The web-based UI sports a search box with access to notifications, the



**Figure 1:** ZenCase landing pages display a customizable, data-driven dashboard of reports, including a daily hours overview, billable hours submitted in the last year, total billable hours, and task management with statute of limitations tasks.

“ZenKM helps organize trial or deposition workflows 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.”

support desk, and a function to quickly add content, such as a new client or time entry. The left panel navigates all LPM features, including contacts, matters, tasks, reports, invoices, payments, and knowledge management (ZenKM).

You can access favorites, bookmarks, and start timers from any web page, but you don't need manual timers to track billable time. ZenCase 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. The software can also generate an alert and remind you to record time spent on a client task.

The system manages customer relationships, tracks all connections, including individuals and organizations, and shows how they interconnect and relate to matters.

### Matters, ZenKM, and ZenGPT

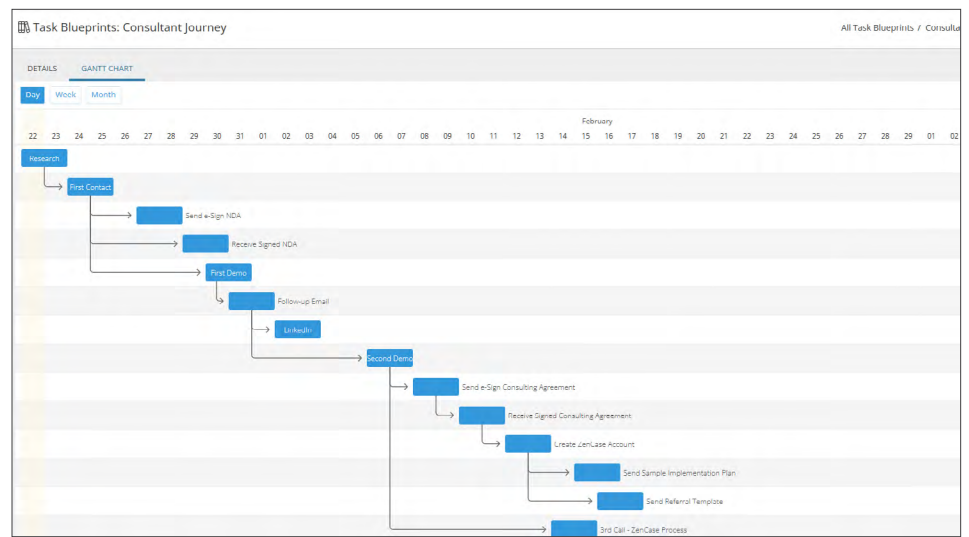
ZenCase **brings all matter data into focus**, including related material and contacts, without creating information overload. A matter summary is displayed across the top of the UI, including matter name, number, originator, manager, client, status, and matter type, with a separate tab presenting summary billing data. More detailed billing and other content information appear in a tabular format underneath the top. Beneath that, there are tabs to access matter tasks, memos, files, charges, billing, mail, trust transactions, credit transactions, ZenKM, and more.

ZenKM helps manage case or firm-related knowledge and information. It includes tabbed or card displays of subjects, facts, questions, answers, authorities, connections, documents, and memos, where each tab has columnar data for various fields. With the ZenCase Chrome extension, you can send and save browser content such as primary authority, documents, and even emails to ZenCase. If you use a different browser, ZenKM can save the hyperlink in the context of other materials. ZenKM links 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 helps organize trial or deposition workflows 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. Create custom records and dynamic questionnaires to automate complex documents with client data, such as compliant regulatory filings, using ZenKM. You can also use an artificial intelligence bot, **ZenGPT**, to conduct legal research and draft documents. ZenGPT learns from the data stored in ZenCase to save time for staff and attorneys and increase firm productivity.

### Document Automation

Automating document creation in ZenCase is more straightforward than using



**Figure 2:** ZenCase's Gantt Chart view of a task blueprint you can reuse for multiple clients and matters.

“ You can create a task in one click by adding the task name, description, type, member type (to assign a user by member role), priority, fee type, duration, budget hours, and deadline. If you have several tasks to accomplish an objective for a client or matter type, create and add them to a task blueprint.”

Microsoft Word Mail Merge. Rather than using merge fields, ZenCase uses **blueprint fields** in a document to pull data from a matter, such as a client, contact, and matter name, and import it into a document. On import, matter data populates the corresponding blueprint fields written as {client\_name}, where curly braces enclose field names.

You can create a document blueprint and reuse it in multiple matters. Create a Word document, use blueprint fields as variables, save it, and upload it to ZenCase by selecting Add Document Blueprint from the Document Blueprints page linked in the left sidebar menu. From a matter profile page, select Create a Document and choose a new or recent blueprint or choose from the library.

ZenCase will best match the fields with any available matter information and present it in a preview window for you to finalize and add information to any missing fields. Save the document, and it becomes available from the Matter Files tab.

### Task Blueprints

You can create a task in one click by adding the task name, description, type, member type (to assign a user by member role), priority, fee type, duration, budget hours, and deadline. If you have several tasks to accomplish an objective for a client or matter type, create and add them to a task blueprint.

Add a task blueprint from Task Blueprints in the left navigation bar. Then, add the individual tasks to accomplish a client or matter objective; use predecessor or successor dependencies to form a workflow from one task to another. Most tasks will start before or after another, but you can begin or make them due

simultaneously and set lag times between tasks in calendar or business days.

After you enter all task dependencies, you can click the Gantt Chart tab to view how your dependencies associate one task to another. *See Figure 2 on the previous page.*

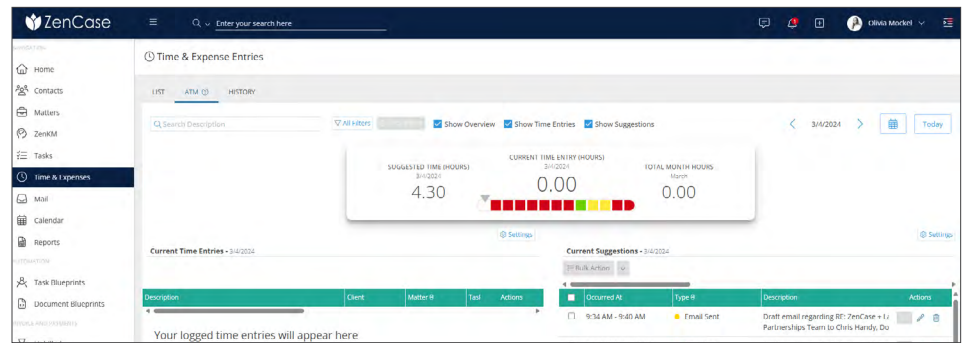
### Time, Billing, and Accounting

ZenCase reduces the time and effort spent on firm financials and brings visibility and insight for law firms to **manage time, billing,** and collections. You can use manual timers to add time to a matter and easily add time and expense records to matters, adding any related information as an attachment, like a receipt or itinerary. ZenCase can enforce business rules on expenses and time records to meet client budgets and requirements.

On the Time & Expenses page from the left navigation bar, find all your time and expense entries to manage and review billing information. A calendar overview at the top of the page shows the total daily hours, hyperlinked to daily time entries. Add time entries, fixed fees, and expenses manually and use filtered views to manage all entries. You can import entries from a CSV file or use ZenCase's Automated Time Manager (ATM). *See Figure 3.*

ZenCase supports Legal Electronic Data Exchange Standard (LEDES) billing and variable LEDES code sets for 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, invoice summaries, and customized cover



**Figure 3:** ZenCase ATM can suggest time entries based on your activities and events spent on clients and matters, including calendar events, email and document generation, and tasks completed.

letters. The system supports trust accounting client refunds, allocates payments to expenses first and then pays multiple invoices, and supports pay when paid, which is ideal for the firm wanting to pay service providers after receiving payment from the client.

### Reporting

ZenCase has two types of reports: standard and custom. Standard reports support all firms, such as aging reports on accounts receivable, client invoices and payments, collections overview, time entries, and more. ZenCase creates new standard reports regularly, like a work-in-progress report on all unbilled charges. Use filters on standard reports to display complex data without SQL search queries.

With a custom report builder, law firms can 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, including the ability to create, view, update, and modify objects in ZenCase, such as blueprints, contacts, matters, and more.

### Integrations and Cloud Services

ZenCase uses a multi-tenant software architecture in Amazon Web Services (AWS). The SaaS platform supports an application programming interface (API) integrating popular document management services, including Box, Microsoft SharePoint, and NetDocuments. These services operate within the ZenCase user interface, not in a separate window. ZenCase also integrates with Microsoft 365 and Outlook.

Although ZenCase handles billing, collections, reporting, and managing trust balances, the software supports tight integration with QuickBooks Online, where you can best view financial statements such as the income statement and balance sheet.

### Pricing and Data Migration

ZenCase costs \$999 per user per year with no hidden costs. The software uses an industry-standard data structure that accepts CSV data migrations. The company works closely with several leading consultants who can prepare and migrate data for more complex migrations.

### Who is ZenCase?

Jacksonville, Florida-based Groundswell Productivity Solutions, doing business as ZenCase, makes its namesake cloud-based

law practice management system for lawyers and law firms to find better ways to solve complex day-to-day problems, create work product in less time and with less effort than other solutions, and reduce administrative overhead. Thomas J. Fraser, Jr., CEO and founder, leads ZenCase, which is sold in North America, primarily in the US. ZenCase was selected as "Case Management Solution of the Year 2023" in the fourth annual LegalTech Breakthrough Awards program and was a finalist in Legalweek's Leaders in Tech Law Awards 2024 for the Innovating Knowledge Management and Practice Management Innovation categories.

### Why Buy ZenCase?

- Quickly solves complex problems in law practice management, including managing time and expense entries, sending invoices, and getting paid.
- Efficiently creates work product using document automation (blueprints).
- Create and reuse task blueprints to accomplish client and matter objectives.
- Automated Time Manager suggests time entries from work accomplished for clients and matters.

### See ZenCase Today!

See how you can create better work product with less effort—more Zen! [Schedule a demo today.](#)

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