

Review: AdvologixPM: Web-Based Practice Management

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AdvologixPM

www.advologix.com

TechnoScore: 4.5

1 = Lowest Possible Score;
5 = Highest Possible Score

Have you ever wanted to cut the cord and take your practice everywhere you go? Have you ever thought about all the money you spend on hardware and software? Practice management consultant Seth Rowland began hearing these questions from his clients a year ago. Ever since, he has searched for the best Web-based practice management system. In this TechnoFeature article, Seth reviews AdvologixPM, which is built on Salesforce.com's Force.com platform. What does Seth think? Read his review to find out.

INTRODUCTION

Have you ever wanted to cut the cord and take your practice everywhere you go? Have you ever thought:

- Why do I need this expensive Windows server?
- Do I have the "protection" I need?
- Why do I spend so much money and time on networking hardware and backup?

With these questions in mind, I began my exploration of cloud-based computing over a year

ago. I was looking for a solution for my law firm clients that would give them the freedom to practice law while they were out of the office, connect and collaborate with their clients and other attorneys, and put together "virtual teams" — with minimal startup costs and fixed on-going costs.

COLLABORATIVE COMPUTING

One piece of the puzzle already existed. Services like Citrix's GoToMeeting.com have paved the way for cheap "all you can meet" plans that have enabled lawyers to meet with clients and colleagues in a "virtual space" on the Internet to discuss documents. With desktop sharing, free voice-conferencing, full white-boarding technology, and integration with email and instant messaging platforms, meeting require minimal planning and no travel. Other services like WebEx, LogMeIn, and NTRMeeting followed with low cost monthly plans. Google Apps and Microsoft Live offer "collaborative" document editing as an alternative to desktop sharing.

On the one hand, collaboration services reduce business travel and save money in recessionary times. On the other hand, such services enable leisure travel because you're never too far from the office or unable to attend a meeting. They enable you to leave your office and see the world. No longer "looking out the window," you could go out the door.

But there's a "cost." You still need an office. You still need a com-

puter network. You need a server with all the fixed hardware and software costs. You needed to hire specialists to manage all the hardware and software. You need to pay maintenance fees for the software and periodically replenish the hardware. You need to add cooling systems to draw off the heat to prevent equipment failure, backup systems to prevent against data failure, power systems to handle interruptions in power supply, intrusion protection system to thwart attacks from the Internet, and antivirus, anti-spam, and anti-phishing systems for email.

Managing this technology was a matter of balancing unknown costs against unknown risks. And you thought you wanted to practice law.

There was no need to prove stability, or establish security, or prove scalability. AdvologixPM has the power of the "Force.com" behind it.

ENTER VIRTUAL COMPUTING

Cloud or virtual computing is not for everyone. An adventurous spirit chooses this path — or someone with no legacy systems and technology investment. With "cloud computing" there is no hardware, no network, no software install — only the browser. You can access

your files and information from any computer, and in some cases, any computing device that can communicate with the Internet. That includes PCs, Macs, netbooks, iPhones, etc. You don't need Windows. You don't need any particular version of Windows.

If you lose your laptop, your server overheats and melts the hard drives, your office burns down or you have to evacuate for a hurricane, you lose nothing. Find a device with a browser, enter your login, and access all your files. Your cost is a monthly fee per user — less than the cost of your average cell phone with data plan.

Virtual computing works especially well if you want to manage a law firm based on specialty, rather than geography, putting together a team of lawyers and professionals in multiple geographic locations.

A prominent feature is the Stop Loss billing view which enables you to review the system for any potential lost billing opportunities and the ability to create billings for those missed items.

ADVOLOGIXPM: BUILT ON SALESFORCE.COM'S PLATFORM

Salesforce.com is the most successful cloud-based application. It's the gold standard. The company, Salesforce.com, has a market capitalization of \$8.23 billion and revenue of \$1.24 billion. It has over 67,900 customers. [The company claims that 200,000+ developers have created over 135,000](#)

[custom applications](#) with over 1,000 applications and service listings on its AppExchange.

When I heard that Advologix had released AdvologixPM, a legal practice management system for lawyers using Salesforce.com's Force.com development platform, I paid attention. I understood that this was unlike any other Web-based practice management system. There was no need to prove stability, or establish security, or prove scalability. AdvologixPM has the power of the "Force.com" behind it.

AdvologixPM is licensed for \$70 per user per month — period. That includes complete practice management, document automation and management, account management and billing, mobile access, workflow customization, Web intake forms, and mobile phone access for contacts, tasks, and events. A full-featured app for mobile phones costs extra.

You can also add third-party apps, including the NetDocuments document management system and QuickBooks synchronization. The AppExchange includes hundreds of additional applications, many of them free or available for nominal charge.

THE BASICS

AdvologixPM uses three primary records: Accounts, Contacts, and Matters. Ancillary records include: activities (tasks, events, calls, and messages), notes and attachments, emails and alerts, issues, and research for the front of the office. AdvologixPM also includes a full billing suite with bill and expense slips, retainers, invoices, and trust accounting.

At the top of the tree are Accounts, which function as the "company"

record for your clients. New Matters are linked to a single account. Contacts can be linked to multiple accounts and multiple matters. From each of these primary records you can see instantly all related ancillary records at once.

When the Matter opens, all your lists of records appear. There is a quick view on top of the form that displays your record counts and a hyperlink to the actual record list. When you place your mouse on the hyperlink, it opens a tabbed view of the record list and several action buttons. Alternatively, you can scroll down the record to see a complete list of records on the file. By default, the program only shows you the most recent records.

As you work with AdvologixPM, you quickly forget about the Web browser. It functions like a desktop program. There is a task pane on the left with shortcuts to create new records, access to your calendar, and conduct searches. The task pane also includes a "recent items" list that is particularly handy.

Did I mention billing? The return on investment for a practice management system is often demonstrated in terms of gained billings. The \$70/mont/user fee amounts to 15-30 minutes per month. Everything in AdvologixPM is billable. Ancillary records contain a box for billing purposes and a rate lookup list. A prominent feature is the Stop Loss billing view which enables you to review the system for any potential lost billing opportunities and the ability to create billings for those missed items. A search filter helps you to search and view unbilled activities, and future activities that are not assigned to a matter.

THE POWER OF THE FORCE

AdvologixPM is immense and complex. It gives you a wealth of information. The intake forms for matters, and the contacts and accounts are comprehensive, storing a wealth of vital information. The views of the information are clear and easy to navigate. There are hundreds of reports to analyze the information from different perspectives. Analytical dashboards graphically represent staff productivity. You can access all the data for merge templates (over the Web). There is a comprehensive security suite. Offline backup of the entire database is available, along with import and export capability. It's an impressive package as delivered.

But that is only the beginning. AdvologixPM is customizable. You can add new fields, new field groupings, new lists, new views, new filter, new lookups, and even new record types. You can define new reports, new triggers, and new templates. You can create custom layouts for existing data entry forms that hide or show fields based on classification code. You can change the primary tabs, add analytical dashboards, run reports, and then change the parameters to explore different scenarios. The very tools used by Advologix to build the software on Force.com are available to you as the "power user" of the product.

These development tools are powerful and easy to use. Advologix has included nearly 100 tutorial videos, many on system customization. The documentation on how to use these tools is built into the very tools themselves. Open the configuration panel and all your options are laid out before you in plain Eng-

lish. The terms are defined and explained. Open an object and a range of properties are presented to you to configure. The programming is easy; the hard part is really deciding what you want to do.

**To the extent that
"virtual practice" is the
future of law, AdvologixPM
is the future of legal
practice management.**

WITH POWER COMES GREAT RESPONSIBILITY

AdvologixPM is a comprehensive and powerful practice management system. It is infinitely configurable. On first impression, the complexity can be overwhelming. Where to start? Training is required. It's not a simple system that envisions one type of user. If you have worked with other practice management systems, you will not find the transition to AdvologixPM too hard. Some of the navigation will be different, but the principles are the same.

If you are new to case management, hire a consultant. With all the savings in upfront cost on hardware and software purchase, you should have some funds available to meet with a consultant and define how you want your practice management system to run. A consultant will look at your workflow and configure the system to match your area of law. He or she will help you set up staff tables and rate tables for billing, define templates for merges, and setup analytical dashboards to display productivity.

AREAS OF IMPROVEMENT

Some of AdvologixPM's billing processes need streamlining. The invoices or statements should better support advanced billing. More shortcuts would reduce the number of steps required to create and link a record. Some of the default layouts include irrelevant fields and omit important fields. Other areas could also stand some improvement.

You can submit suggestions to Advologix. You may receive a call back from the developer. More significantly, you may find that the next time you log into AdvologixPM, the issue has been fixed. Or, you may receive instructions explaining how to customize your own system to add that feature.

CONCLUSION

AdvologixPM is a solid application. I would give it a 4.5 in its current version. My only reservation comes from the complexity of the product and the current lack of some batch procedures found in other practice management solutions that would make the program easier to use.

AdvologixPM on Force.com is for users who seek "freedom" as outlined above. It also provides freedom from the developers of the software as there is no need to wait for the programmer to add a requested feature; you can do it yourself.

Without hesitation, I would recommend AdvologixPM to an Internet savvy lawyer who frequently travels between one or more office sites (or client locations) and has struggled with the issue of having the most current data and documents available at all locations.

I would also recommend AdvologixPM to the new breed of “Virtual Law Offices.” These firms that have literally set up their shingle on the Web. Their lawyers and staff may work out of several different locations — an office, a home office, or even a houseboat.

To the extent that “virtual practice” is the future of law, AdvologixPM is the future of legal practice management.

ADVOLOGIX’S RESPONSE

We invited Advologix to respond to this TechnoFeature. CEO Paul Deschenes responded as follows:

“Thank you to the reviewer for his thoughtful insight.

“As the review points out, we continue to make automatic improvements to the system for our

customers. Many of his observations for desired improvements have already been addressed or are being addressed right now, including billing processes and an offline application without need for an Internet connection. As the reviewer mentions, our core focus for product development and improvement are derived from our customer’s needs and requests.”

Seth Rowland is an attorney and a technology consultant specializing in practice management and document automation. For many years he has worked with Time Matters, Amicus Attorney, and HotDocs. He was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is founder of and moderator for The Virtual Lawyer group on LinkedIn.com and at BestThinking.com. Please feel free to [visit his blog](#) for the latest on document assembly and practice management.

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