

A Portal for Your Practice

By Eliza Sarasohn

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If your law firm hopes to survive, you must efficiently manage every element of your practice — clients and matters, documents and email, appointments and tasks, secure collaboration, billing and collections, and much more. There's just one problem — what if you're not a mega-firm with a dedicated IT department and on-site trainers? What if the software you can afford lacks the features you need or has too many features you don't need? One company claims to have explored the actual needs of law firms, resulting in a Web-based practice management system with everything you need and nothing you don't at an affordable price.

Portal4Law ... in One Sentence

PortalSoft's [Portal4Law 5.0](#) is an online (SaaS) practice management service for law firms and legal departments.

The Killer Feature

Back in the day, lawyers were content if their practice management software helped them organize their contacts and calendar and connect that data to their matters. While this need still exists, the number of documents lawyers must manage has exploded thanks primarily to email.

PortalSoft integrated document management into Portal4Law from day one rather than tack it on as an afterthought. Each user has up to 10 GB of storage space for uploading and classifying email and documents. Once uploaded, you can share documents with colleagues and clients. Portal4Law remains available to use during batch uploads and subsequent document

indexing because the processing takes place in PortalSoft's data center, not on your computer. The versioning technology keeps track of multiple revisions of a document.

Portal4Law not only handles your work product and related records, but also discovery documents. You can connect both types of documents to a specific matter. Portal4Law offers full-text Boolean, fuzzy, and filter-based searching, including by author, client, matter, date, and custom tags. The Export function enables you to produce a collection of selected documents in native format for discovery.

"We are dedicated to offering large firm features at a small firm price point," PortalSoft CEO Ajit Dandapani told us. "The depth and sophistication of our document management feature set illustrates this guiding principle of ours."

Other Notable Features

Portal4Law also contains traditional practice management features. For example, the billing system supports multiple fee arrangements that you can customize — time and expense slips, periodic fixed-fee, milestone-based fixed-fee, retainers, advance deposits, etc. You can use the preloaded Uniform Task Based Management System codes or create your own. When processing time slips, you can have Portal4Law

automatically enter the amount due based on the activity or the person who performs the activity.

Other notable features include a dashboard that summarizes pressing appointments, tasks, and recently-modified matters, secure real-time collaboration to ensure multiple users can view each other's changes nearly instantaneously, cloning of forms and documents in your library, and context-sensitive help.

What Else Should You Know?

PortalSoft costs \$39.99 per user per month. You can try it free for 30 days. The annual subscription discounts twelve months service to the cost of eleven.

PortalSoft, Inc.

2570 West El Camino Real
Suite 280
Mountain View, CA 94040
(650) 396-7376
www.portal4law.com

The screenshot displays the Portal4Law software interface for 'PortalSoft Law, LLP'. It features a navigation bar with 'File', 'Go', 'Window', and 'Help' menus. The main content is divided into three sections: 'Appointments (3)', 'Matters (4)', and 'Tasks (9)'. The 'Appointments' section shows a calendar view with entries for Monday, October 25, 2010 (3:00 PM to 4:00 PM), Tuesday, November 2, 2010 (11/2/10 10:00 AM to 11/2/10 11:30 PM), and Tuesday, November 23, 2010 (5:00 PM to 9:00 PM). The 'Matters' section lists four matters: 'amazing elixir', 'Broken Phone', 'Patent', and 'Robbery'. The 'Tasks' section lists nine tasks with columns for 'C', 'M', 'Subject', 'Start', and 'End'. The interface also includes a search bar and a footer with copyright information for PortalSoft, Inc.

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