PRACTICE MANAGEMENT SOFTWARE CHECKLIST

This checklist is designed to assist you when reviewing your existing practice management software, considering purchasing or subscribing to a new practice management software or upgrading your existing system.

Before you approach a software provider it is important you identify the features you will use and require.

Company

Name of Company

Year established

Country of origin

Contact information – sales and support

Platforms available

Is the program cloud based/local server/hosted server?

If the program is cloud based/hosted server solution, where are the servers based?

☐ Can you use the program on your preferred platform (ie Microsoft Windows or Apple MacOS)

Does the program offer:

☐ a mobile app? (Android and/or Apple)

☐ off-line access (ie if internet connection is lost)?

☐ a client portal?

Pricing Model

What is the term of the Contract? Is it a month by month subscription, annual or locked in term?

☐ Does the provider charge for upgrades or are they included during the term of the contract?

☐ Does the provider charge for support/maintenance?

☐ Does the provider charge for training? If included, how many hours/users are included in the training offered?

Features

How many simultaneous user seats does this program support?

- ☐ Does it capture bank account details?
- ☐ Is there integration with Outlook/Google Workspace Email?
- ☐ Is there a safe custody register?
- ☐ Are there permission settings?
- ☐ Does the program offer ability to add custom fields, default values and categories?
- ☐ Does the program offer custom reporting (client, matter, financial, user/producer)?
- ☐ Does the program offer an API [Application Programming Interface] and/or integration with third party apps eg can data be synced to or from an external accounting program, public property search database, marketing campaign managers)?
- ☐ Is the program on an open database (ability to export all data)?

What security offered/options? ie Username and password, multi-factor or two-factor authentication

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Matter Management

Does the program have or include:

- ☐ matter locking (ie locking, not closing, a matter to prevent further activity)
- ☐ matter security (ie access to specified users only)
- ☐ a critical dates register
- ☐ user definable data fields for additional data capture
- ☐ tasks and workflows/checklists
- ☐ delegation of tasks feature
- ☐ a document management/matter register

- ☐ precedents/forms
- ☐ record exposure limits for fees and disbursements with alerts
- ☐ court form documents
- ☐ precedents documents/Lexon risk tools
- ☐ third party precedent packages
- ☐ document assembly
- ☐ Word/PDF Integration
- ☐ Email/SMS Integration?

Trust Accounting

- ☐ Is it Trust Accounting compliant for Queensland jurisdiction?

Office Accounting

- ☐ Is an external accounting app required? (eg MYOB, XERO)
- ☐ Is there integration with Xero, MYOB, QuickBooks etc.?
- ☐ Can it generate debt collection letters/statements at predetermined times?
- ☐ Can it calculate interest on overdue debts?
- ☐ Is it able to create reports for Cashflow, Profit & Loss, Trial Balance, Customisable Chart of Accounts?
- ☐ Can it create customisable financial management reports?
- ☐ Does it cover payroll?
- ☐ Can it create BAS Reports?

Does it have:

- ☐ a multi-currency facility
- ☐ input of sundries by non-accounts staff
- ☐ split-billing
- ☐ consolidation of multiple matters into one bill
- ☐ time recording/time tracking

- ☐ fixed fee billing
- ☐ a payment gateway
- ☐ integrated online search facilities and automatic capture of results and charges
- ☐ an ability to alert fee earner when % of fee estimate is reached with work in progress?

Productivity Reporting

- ☐ Can it provide key performance indicator reporting?
- ☐ Is it able to record budget against fee earner and reporting facilities?

Diary

Does it have:

- ☐ diary facilities?
- ☐ on-line diary booking options?
- ☐ diary integration with Outlook/Google Workspace calendar?

Marketing

- ☐ Can it capture marketing communications?

Does it offer:

- ☐ marketing media analysis (ie ability to analysis where matters are coming from)
- ☐ client relationship management
- ☐ client profiling/segmenting
- ☐ a conflict check (for new contact and new matters)
- ☐ intake forms (website integration)
- ☐ referral tracking
- ☐ bulk email/sms functionality/list segmentation?

Exit strategy

Is there an ability to export documents, matters, contacts, time entries, invoices and financial reports?

What is the time frame to export?

What is the cost to export/retain files/have read only access?

Notes