The Rocket Matter Guide

To Practice Management Integrations

The beauty of the right legal practice management software is that it does so much.

From time tracking to billing, scheduling, project management, payment processing, trust accounting, and even in-depth reporting, a practice management platform can bring almost all of your firm's daily work into the same software tab.

But as you consider different practice management solutions for your law firm, it’s also just as important to look at what the software doesn’t handle - and whether there are software integrations in place to help cover those gaps. If the practice management tool you invest in can’t integrate with your document tools, accounting software, or email, you’re going to lose a lot of time manually copying data back and forth.

That’s why we put together this quick list of key practice management integrations. Every firm has its own needs, and some of these integrations may be more relevant to your workflows than others - but these are the most common ones for law firms looking to maximize their efficiency.

Email Integrations

Email is an integral part of the daily routine. Your attorneys use email to send important communications to clients, contacts, and coworkers - and your practice management software should integrate with your email client to support time tracking, document sharing, matter management, and more.

For example, a practice management software that integrates with Outlook allows your attorneys, paralegals, and staff to track their time directly from their Outlook accounts as they send and respond to emails. You can also upload emails and attachments directly into your matters, so you don't have to waste time manually copying important information over.

With the right file-sharing tools (more on that later!), you can also send and receive secure files by email directly from within your practice management software.

Calendar Sync

Whether you're Team Google Calendars or Team Outlook for scheduling, your practice management solution needs to integrate with your calendaring. The goal? Seamlessly syncing your team member's personal calendars with your firm-wide calendar to help you avoid unforeseen scheduling conflicts.

QuickBooks Integration

Many law firms rely on QuickBooks to handle their general accounting needs, and there's good reason for that - QuickBooks is a powerful and well-established accounting tool for businesses across a variety of industries.

The problem with using QuickBooks as a standalone software is that your practice management software will probably be handling your firm's time and expense tracking, invoicing, payment processing, and more. If the two software can't sync information back and forth, you'll be spending a lot of time manually copying information into QuickBooks (a proven formula for both lost time and data-entry errors).

The practice management software you choose should be able to import and export contacts, invoices, expense entries, and more to and from QuickBooks, so you can ensure all of your firm's financial information stays synced and consistent.

With that said, it's important to note that QuickBooks shouldn't be handling all of your firm's accounting. Generalized accounting software like QuickBooks aren't designed to handle the unique compliance requirements associated with legal trust accounting, so whatever practice management software you choose should also offer specialized features for managing client trust accounts.

Document Software Integrations

Legal work involves a lot of documents - and that means a lot of tedious document preparation and data entry work unless you have the right integrations in place.

A practice management software that integrates with Office 365 will allow your attorneys and staff to generate shared legal documents from customizable templates and save them directly to your practice management software's document management system. You can even automatically populate fields with the client information saved in your system, cutting down on data entry and reducing the risk of costly data-entry errors.

And as an added bonus, integrating with your practice management software will make it easier to seamlessly track time spent on document prep.

Document Sharing Tools

Most practice management software offer secure client portals for uploading and signing important matter documents. (And there's nothing wrong with that - Rocket Matter does too!)

The problem is that not every client wants to log in to a portal just to send, review, or sign legal documents, and getting less tech-savvy clients to use the portal consistently can be especially challenging.

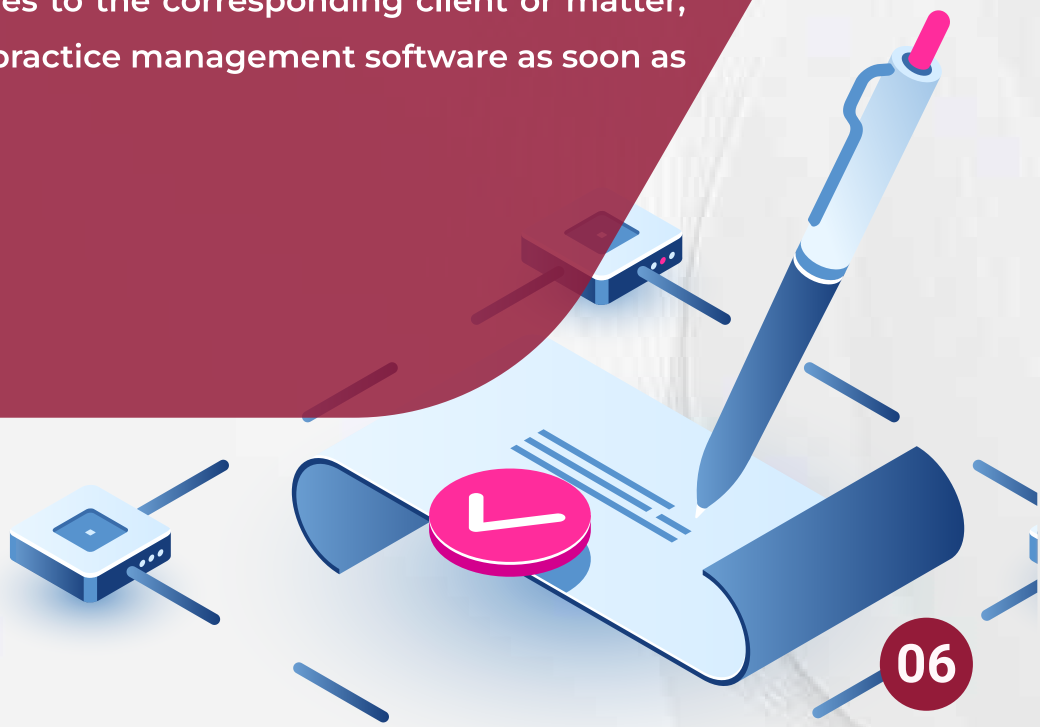
The other problem? Just sending those documents by email isn't secure. In fact, it could easily put you at risk of violating bar compliance regulations concerning the protection of clients' confidentiality. That's why you need an integrated file sharing system that lets you send documents by email while keeping them encrypted in transit and at rest.

E-signature Tools

The documents you send clients often require signatures (and every attorney knows that tracking down signatures can be a real hassle). To save time, make sure your software integrates with one-click e-signature tools so you can quickly send and gather important signatures by sending a plain old email.

However, the time you save with e-signatures will only take you so far if you have to jump between browser tabs to complete those tasks. That's why the best option is to work with tools that allow you to send and receive files and signatures directly from within the practice management software itself.

As an added bonus, the right software can even automatically upload requested files and signatures to the corresponding client or matter, so you'll have it within your practice management software as soon as it comes in.



Legal CRM Integrations

Client relationship management (CRM) software helps your firm do just that better manage your relationships with clients.

A good legal CRM will help your law firm:

- **Automate your marketing efforts**
- **Find (and sign) a greater number of leads**
- **Streamline client intake through automation**
- **Foster stronger relationships with current clients**

If your firm uses or is considering using a CRM software (and really, you should!), most of your clients' intake information will move through your CRM first before you start to work on their matters within your practice management system.

That means it's absolutely vital to ensure the two software can share data. With the right integrations in place, you can automatically sync the intake information collected by your CRM with your practice management system, so you can transition seamlessly from onboarding new clients to serving their needs.

Rocket Matter integrates with the software tools you need

At Rocket Matter, we take pride in how much our industry-leading practice management software can handle - but we know we're not the only software your law firm's team will be using.

That's why we offer a whole suite of robust software integrations with the other tools your attorneys and staff will be using every day. All of those nifty integrations we talked about above? Rocket Matter offers all of those integrations and more.

Of course, all of that would be less-than-impressive if we didn't also offer best-in-class software tools to support your firm's daily workflows, including:

- Streamlined time tracking and billing
- Legal matter management
- Calendars and scheduling
- Legal trust accounting tools
- Document automation
- Bar-compliant online credit card processing
- In-depth reporting and analytics
- And more...

If you're ready to see what difference our industry-leading practice management tools can make for your firm - or you have further questions about the integrations we support - sign up for a one-on-one demo with a member of our software support team.