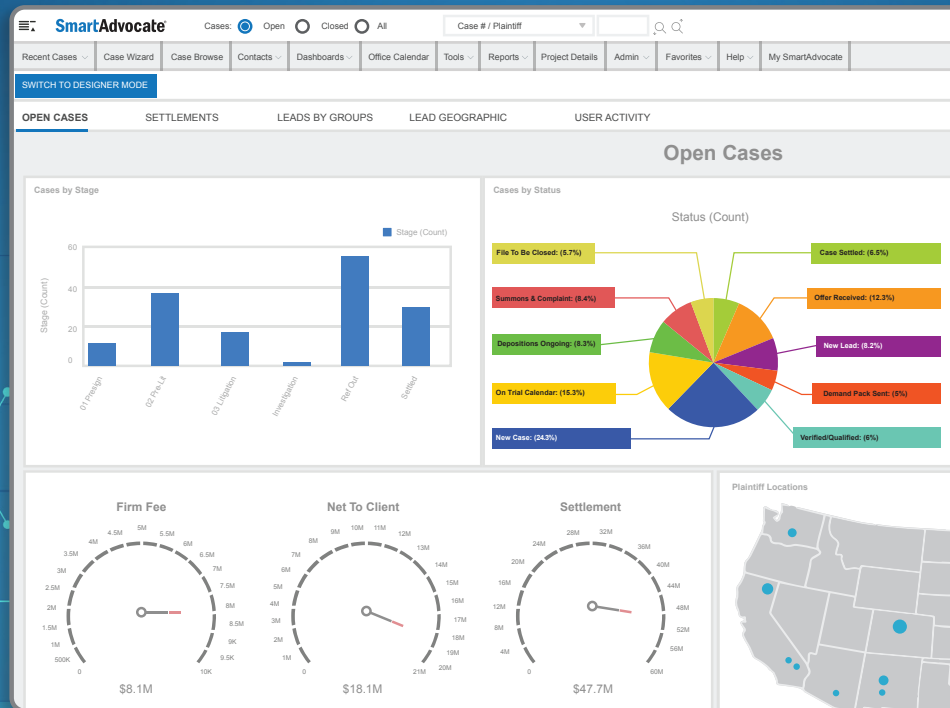# SmartAdvocate®

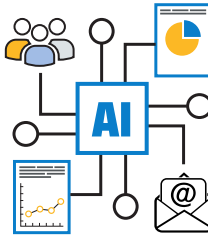## A Smarter Way to Manage Your Cases and Your Firm



**Award-Winning Case Management Software Featuring New Built-In Artificial Intelligence**

# SmartAdvocate®

## Why Choose Us

**Transform your firm with SmartAdvocate, the best choice for legal case management software.**

## Built-In Artificial Intelligence Tools

Use built-in AI for document generation, plus analysis of data, depositions, and trial testimonies. Gain deeper insights and save valuable time having AI summarize new cases, motions, large documents, briefs, depositions, and trial transcripts. Get AI assistance drafting emails and summarizing/suggesting action items from your case-related recorded phone calls.
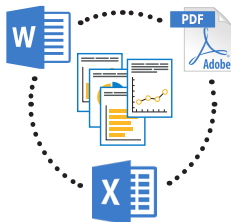
## Cloud & Server Based

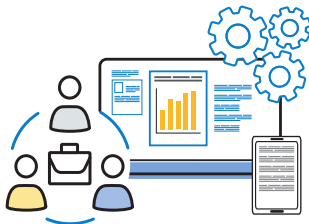Either option is fully browser-based, allowing for multiple users to work on a case at the same time.

## Dashboards & Reports

Keep track of critical case and lead information, plus vital financial and operational details with dozens of dashboards and reports, or customize your own with our Business Intelligence Dashboards.

## Document Management

Create document templates from over 4,000 merge codes. Plus, save attachments directly from emails, batch scan using our exclusive barcode feature, share documents externally and even send for eSignature.

## Automate Your Firm

Save time and ensure that every stage of your cases, from intake to settlement, are handled in an appropriate and consistent way with WorkPlans and Automated Procedures.

## Improve Your Intake Process

Our built-in Intake Wizard allows intake staff to capture all of the necessary information from each new prospect. Additional capabilities include the ability to track and assign leads, view intake performance, intake scoring, monitor follow-up and more.

**Scan here to see more reasons why law firms choose us.**

# Key Features

**SmartAdvocate has a wealth of features designed to make your firm more efficient and profitable.**

### Mass Communications
Send an email blast or mass text to clients directly from SmartAdvocate. Use templates to pull client's individual data and attach documents from a case to mass-generated emails.

### Barcoding
Scan multiple documents simultaneously and have each document attach to the appropriate case with our exclusive barcoding feature.

### Business Intelligence Dashboards
Create completely customized dashboards with charts, graphs and maps built from any of your data. This feature translates into extensive, tailor-made reporting to fit your firm's needs.

### Full Text Search/OCR
Automatically OCR scanned PDFs, plus search the content of your documents including Word and PDFs utilizing full text search.

### Partner Law Firm Portal
Easily share case progress with a referring law firm, or get updates from refer out law firms using a secure password protected link.

### Client Fillable Questionnaires
Share your custom questionnaires with clients and have answers automatically saved in SmartAdvocate. Send the links individually or via mass email/text.

### Medical Records & Chronology
Create and track medical records requests directly to the provider or through a medical records retrieval service. Dashboards monitor overdue and outstanding requests.

## SmartAccounting
Streamline finances with SmartAccounting. Manage all functions including case disbursements, payables, escrow and operating accounts, and printing checks. Easily transition between multiple accounts for complete management of firm finances.

## Custom Fields
Automate and track every aspect of each case by customizing intake questionnaires, case statuses, Plaintiff Fact Sheets and more with User Defined Fields (UDFs).

## Built-in Document Sharing
Share documents of any size using a secure password protected link with an expiration date. Optionally allow document override and/or new document upload.

## Office Calendaring
Easily maintain/view full calendar for a case, or entire office. SOLs, Critical Deadlines and appointments pushed to staff's calendars. Share your calendar with outside contacts to book a meeting with you.

## Client Portal
Provide clients instant access to their case documents, case calendar and notes. Your firm maintains complete control over what they can see.

## SmartAdvocate App
iPhone and Android apps provide on-the-go access to case information from virtually anywhere. Send texts, emails, add appointments, view documents and more.

## Internal Messaging
Firm staff can send case-specific internal messages directly through SmartAdvocate. Easily visible via notifications, messages can be opened, read, marked and shared.

## Time Tracking
Record time spent on cases, configure by Case Group, and set automatic reminders to make entries. Time spent and billing rate calculated automatically, and can pull directly into an invoice.

## 150+ Integrations – Including AI
SmartAdvocate has extensive 3rd party Artificial Intelligence integrations for Medical Record Summaries, Medical Chronology and AI-driven Demand Packages, with more partners in the queue! Plus, firms can customize SmartAdvocate with time-saving integrations like eSignature, accounting, texting, and much more.

**These are just a few of our key features. Scan here for more.**

SmartAdvocate®

# Here's What Our Customers Say About Us

**Richard J. Arsenault**
Neblett, Beard & Arsenault
"SmartAdvocate is unquestionably the leading legal case management software. Its incredible functionality reflects how it was developed with attention to every detail, and is constantly evolving with technological advances. Our initial training was productive and empowering, and the continuing support has been remarkable; an unparalleled customer-centric approach. SmartAdvocate has revolutionized the way we manage our cases and service our clients. The customization options and flexibility are unmatched, allowing our firm to tailor the software to our specific needs."

**Michael P. McCready**
McCready, Garcia & Leet, P.C.
"I am loving SmartAdvocate, and our firm has customized it substantially to suit our needs. I love to show my colleagues how I manage my cases and I've also recommended it to several of them. Your program is terrific."

**Steve Malman**
Malman Law
"The ability to text and eSign right from the system is a game changer for client satisfaction. Ordering medical records takes just a few clicks, and tracking requests is totally transparent. SA is not new to the space, and it gives them a huge advantage over their competitors – They really know what makes a PI firm tick."
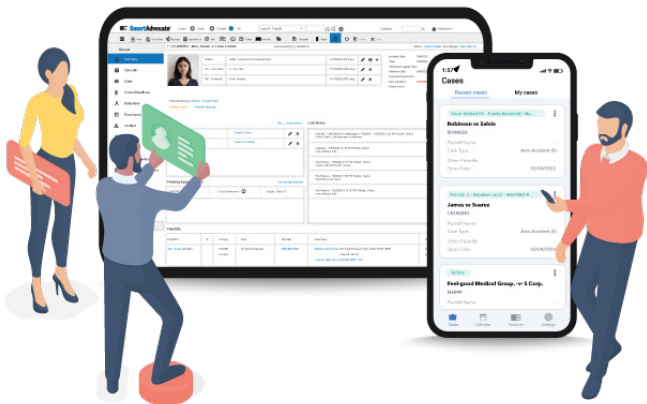
**Jeffrey A. Mitchell**
The Cochran Firm
"It is so nice to have a company hear and address our needs. SmartAdvocate really understands how technology can make our lives so much easier. The software just keeps getting better and better - Thank you! Looking forward to the next release."

**High Performer** — Small Business — SPRING 2024

**Leader** — Mid-Market — SPRING 2024

**High Performer** — SPRING 2024

**GetApp** CATEGORY LEADERS 2023

**Software Advice** FRONT RUNNERS 2023

**SOURCEFORGE** Top Performer ★ Winter 2023 ★

**Capterra** SHORTLIST 2023

**Leader** SOURCEFORGE Summer 2023

**Scan here to see more client reviews.**

SmartAdvocate

# About SmartAdvocate

SmartAdvocate is a fully customizable, award-winning legal case management system made to handle the challenges of today's fast paced, highly competitive and technologically demanding legal landscape. SmartAdvocate's robust, exclusive Internet-based features, enable firms to manage, store, track and communicate like never before, ensuring that they achieve the highest level of success.

When you work with SmartAdvocate, you work with our trained experts. From Implementation to Support, nothing here is outsourced. Every person you work with is a trained expert who is knowledgeable about all of your firm's needs.

**Join some of the top law firms using SmartAdvocate to make their firms more efficient and more profitable.**

Scan here to request a demo.

# SmartAdvocate®

## A Smarter Way to Manage Your Cases and Your Firm

**Award-Winning Case Management Software Featuring New Built-In Artificial Intelligence**

ALM | LAW.COM
THE NATIONAL LAW JOURNAL
BEST OF 2024
**WINNER**

ALM | LAW.COM
THE NATIONAL LAW JOURNAL
BEST OF 2024
**HALL OF FAME**

**1-877-GET-SMART**

**www.smartadvocate.com**