

SCORECARD FOR TIME, BILLING, AND ACCOUNTING (TBA) SOFTWARE EVALUATION

YOUR NAME: _____

DATE: _____

PRODUCT: _____

SYSTEM: _____

PLATFORM: cloud on premises

USER ACCESS: online locally installed

APPLICATION: all in one front office back office

INSTRUCTIONS:

1. Evaluate each system for each of the categories described below.
2. Provide a score for each category (or subcategory). Scoring will be based on a scale of 1-4 where the scores are categorized as:
 - 4 - Superior
 - 3 - Exceeds Requirements
 - 2 - Meets Requirements
 - 1 - Does Not Meet Requirements
3. Include comments and observations concerning each system. Add comments describing distinguishing features justifying any qualitative assessment falling in the "superior" or "does not meet requirements" range, although you may add comments to as many categories as you desire. Please try to use specific examples in your comments.

CATEGORY	SUBCATEGORY	SCORE (1-4)	COMMENTS
GENERAL TBA FEATURES	<ul style="list-style-type: none"> · if application is on premises, what are the annual maintenance costs (you generally must have an active maintenance contract to get tech support)? · integration with QuickBooks/QuickBooks Online/Xero, etc. (or whatever your accountant or bookkeeper uses if you have an outside professional) · understands trust accounting and other legal industry-specific requirements · can handle back-office functions like payroll and general ledger expenses · can download transactions from bank, company credit cards, etc. 		

<p>ACCOUNTING</p>	<ul style="list-style-type: none"> · retainers on matter level · accept credit card, wire transfer, and checks · refund client money · clients may use 1 check for multiple invoices · allows for printing directly to checks (as opposed to hand-written) 		
<p>BILLING</p>	<ul style="list-style-type: none"> · invoice for multiple matters on a client (fees costs, fees costs, instead of all fees then all costs) · LEDES billing - some modified task codes for some clients · PDF by email · selective billing of time and cost entries · past due notices by email · flat rate billing with automatic mark down and up · billing different attorneys at different rates on different matters · flat fees by task · tasks billed hourly, capped with 1 line item on bill · billing monthly and on demand as tasks finish · customizable billing templates 		
<p>REPORTING</p>	<ul style="list-style-type: none"> · dashboard reports · reports to clients · export to Excel · custom formatting - to comply with client requirements 		

SECURITY	<ul style="list-style-type: none"> · granular control · different permissions for different people on different matters 		
TIME ENTRY	<ul style="list-style-type: none"> · text expansion · works on mobile devices 		
OTHER	<ul style="list-style-type: none"> · Any known limitations or additional benefits · · · · 		