

## REVIEW: ADVOLOGIX<sup>®</sup> BRINGS MATTER MANAGEMENT TO THE SALESFORCE<sup>®</sup> PLATFORM

AdvoLogix centralizes all case information, automates customized workflows, manages critical dates and events, and allows legal professionals to collaborate on all aspects of matter management and client services.

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Platforms are gaining popularity in legal. Legal organizations can lease or subscribe to integrated software or build their programs on platforms and not suffer from depending on a single vendor for services.

On the Salesforce Lightning Platform, the company's flagship CRM software is available with more than 5,000 apps in the AppExchange. These apps can extend other software on the platform, such as AdvoLogix, a web-based matter management offering since 2006, focused on Fortune 100 companies and midsize to large law firms.

AdvoLogix provided me a user account to demonstrate the software from December 2019 to January 2020. Most user experience is unique to AdvoLogix, which centralizes all case information, automates customized workflows,

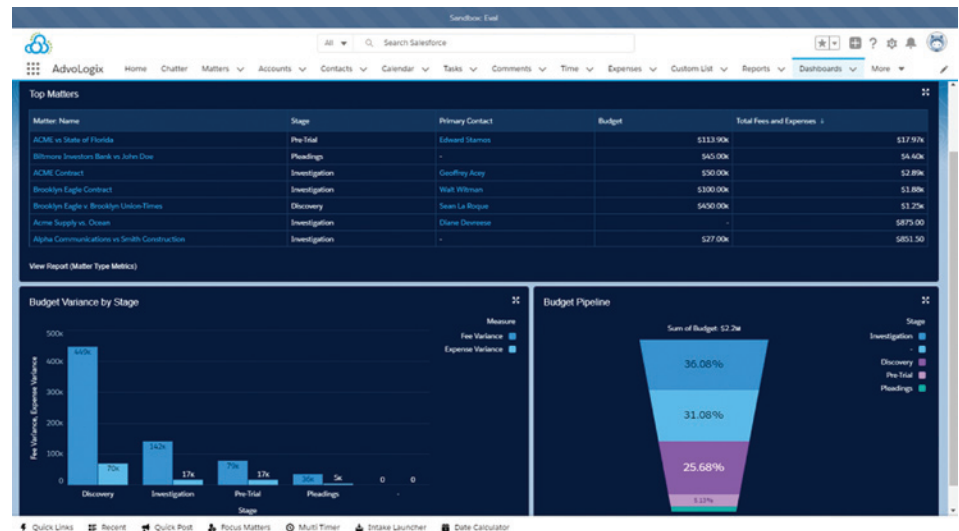


Figure 1: The AdvoLogix user interface (UI) has a persistent toolbar with access to tabbed resources; a filtered, global search window; favorite web pages (star), and global actions (+) to create contacts, events, tasks, and time entries; log calls and check for conflicts. Here, configurable dashboards report status on matters and budgets.

manages critical dates and events, and allows legal professionals to collaborate on all aspects of matter management and client services.

Users have access to other features related to the Lightning platform, such as building blocks to create apps and custom pages without coding (no code), prebuilt templates, and automatic processes to con-

nect to third-party and legacy systems. There are Lightning apps for accounting, billing and invoicing, Salesforce CRM, and more.

AdvoLogix shares objects with the Lightning Platform, so data on accounts, contacts, events, and tasks in matter management are equivalent in Salesforce CRM and other apps on the Lightning Platform. To

get started, all I needed was a web browser.

### Tester's Notes

AdvoLogix runs in any web browser. A user who can navigate a browser with basic knowledge of how search boxes, tabs, dropdown lists, and other navigation tools will speed your success.

The sticky footer in the UI provides access to quick links to everyday tasks, most recent tasks, multi-timers, a date calculator for deadlines, and an intake launcher. AdvoLogix supports configurable intake templates or forms to triage new matters via workflows.

All things revolve around matters in AdvoLogix. But one matter does not fit all cases. From the Matters tab, view cases with tabbed resources for matter details, documents, calendars, and financials in time, expense, and budgets.

I created new matters using forms organized by matter types, such as general litigation, immigration, investigation, tax, and tort. For example, general litigation has several form fields for key dates (engagement date, date responded, date filed, trial date, projected closure date, closed date) displayed in a timeline at the top of the matter. The litigation matter also has data for expected billings and settlement date,

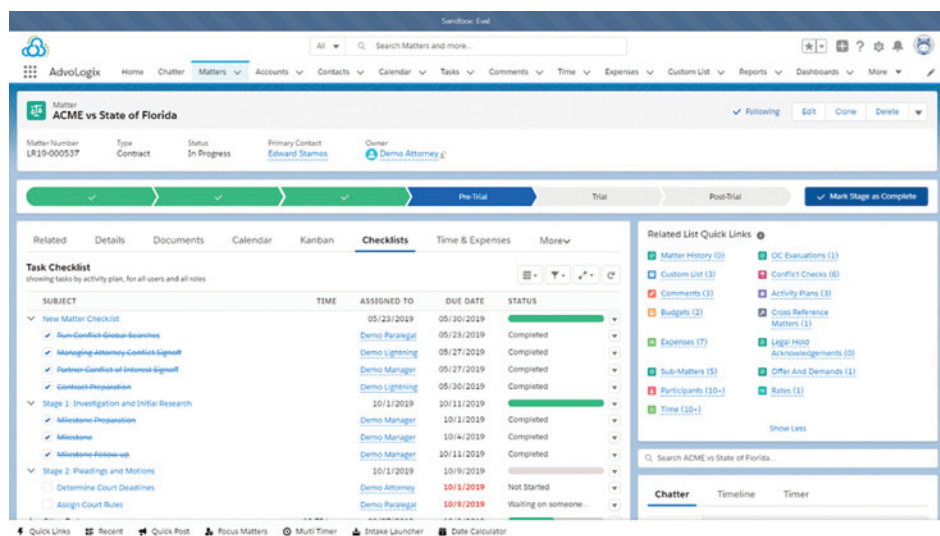


Figure 2. The matter type (litigation) workflow displays at the top and proceeds from initial investigation to pleadings, discovery, and trial. Matter tasks display in activity plans, comprising tasks and activities. The right text box shows quick links to other matter data and a matter search bar.

worst case settlement date and amount, estimated cost, and allocated time.

If a matter type did not have a field I expected, it was easy enough to add it with Salesforce's Object Manager tool and make it accessible to a matter type. The device also made it easy to edit and create matter record types using mouse clicks without coding. I created a matter for mergers and acquisitions with a workflow from investigation and due diligence to document review in a deal room.

Matters support process automation, which includes process approvals, flows, and workflows. Flows can automatically read and write data in fields, collect and display information, manipulate data, and execute business logic. Workflows can assign tasks

to users or roles, update fields, send email alerts, and transmit secure outbound messages via an application programming interface (API) in XML format. I created an approval process for intake forms, legal hold notification alerts, and used Process Builder to make a legal hold process for matters—all using clicks and picks from dropdown lists and search results. Short of creating a process, it's easy to clone and edit one to get started.

AdvoLogix has built-in, essential document management and document assembly features, which are like the mail-merge features in Microsoft Word. The system uses the native document wrapper in Salesforce to categorize and organize documents by matter. Files can be accessed

in the context of a workflow, previewed, and downloaded for review and edit. AdvoLogix lacks advanced features for checking documents in and out and version control. Customers can use third-party integrations from the likes of Box, Dropbox, and NetDocuments.

Daily, lawyers work on multiple, recurring matters for clients. They need the ability to start and stop various timers to document the change and charge of their attention. Advologix satisfies the need with multi-timers, which concurrently tracks time spent on many matters. I created multiple timers during a day to track time spent on billable and non-billable time. I switched the timers on and off as I changed tasks throughout the day.

AdvoLogix supports up to 18 languages. It offers cloud-to-cloud integrations with Office 365 and uses the Lightning sync integration via the Salesforce platform for email integrations with Outlook, and Gmail to store and manage email with matters. The

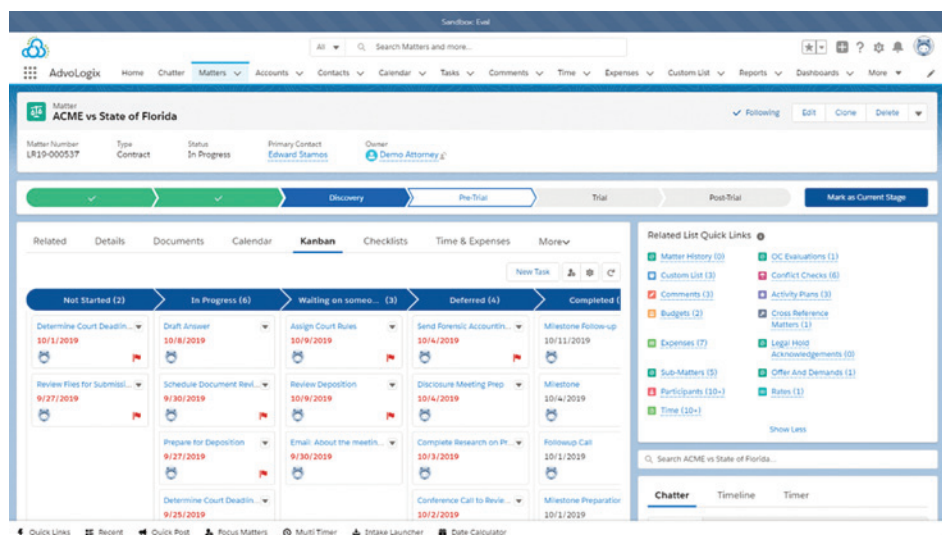


Figure 3: A Kanban board depicts tasks related to a matter at various stages in case-specific workflows, showing what's in progress and overdue (red). Users can also use Gantt Charts to illustrate tasks in a project schedule.

integrations support a sidebar in Gmail and an add-in for Outlook to view AdvoLogix matter data in the context of an email from a matter account or contact.

AdvoLogix licenses the software per user in the North American market and uses partners to provide services. The app starts at \$60 per user per month, and a Salesforce platform license starts at \$25 per user per month. Volume discounts and discounts for non-profit organizations are available. Consultants or implementation partners configure the software to fit clients' unique needs and case types.

## Conclusion

Many law firms and corporate legal departments start with practice or matter management software and quickly grow out of it, mostly looking for accounting and CRM tools. A platform for matter management provides the room to grow, regardless of vendor inertia. With AdvoLogix on the Salesforce Lightning Platform, law firms and corporate legal departments can grow vertically, with customization and process automation tools, and horizontally with more than 5,000 apps from the Salesforce AppExchange, not to mention Salesforce's premier CRM tool.



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