

**Law Practice Type:** Family Law, Criminal and Bankruptcy

**Number of User:** 26

### **Problem**

Ayo and Iken is a mid-sized Florida-based family, estate, criminal and personal injury law firm, with 10 locations across the state. The nature of the firm's legal work requires deposits and time entries to be processed and applied to trust funds. Constant oversight of the process was necessary by a CPA to validate the accuracy of the firm's older legacy system. The Florida State Bar also had changed trust account rules, requiring firms to account very specifically on the



### **Solution**

Ayo and Iken invested in AdvoLogix with the Accounting Seed integration to manage cases and accounting for the firm. The firms used the platform to set up retainer accounts for fully earned funds, and then created separate trust accounts that were not earned. The firm can now move money from retainer to trust accounts accurately at appropriate times and can provide accurate reporting to clients. AdvoLogix implementation partner Practice Development Partners customized, implemented and migrated the firm to the AdvoLogix and Accounting Seed solution.

Previously, reconciliation took place weekly or every other week but now takes place daily and the time it takes has been cut by two thirds, to just two hours a week. The system accommodates 150 time entries each day and helps manage 500 to 600 active matters, many with retainer cash receipts.

### **System and Data Integrations:**

- Accounting Seed.
- Form Assembly.
- Mailchimp for email marketing.
- RollupHelper for aggregating summary data at client and matter and other levels in the application for reporting.
- Grid Buddy to accelerate data entry across multiple records.

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- Highlighter to show alerts
- ABCD for custom development.
- DocuSign eSignature to accelerate turn-around of agreements and contracts.
- iTools to create a delegated task management UI capability and management utility.
- NetDocuments to manage more than 200,000 documents.

About AdvoLogix®

Founded in 2006, AdvoLogix®, is a leading law practice and legal matter management solution that helps law firms and general counsel automate unique business processes and simplify legal matter management. The AdvoLogix cloud-based enterprise solution centralizes matter management, conforms to unique workflows and practice standards, and provides industry leading security and reliability. Built on the leading cloud platform, Salesforce®, AdvoLogix offers comprehensive configuration and integration with thousands of add-on applications to extend the solution to meet specific business needs.

**Contact our team to get started with a personalized AdvoLogix experience.**