

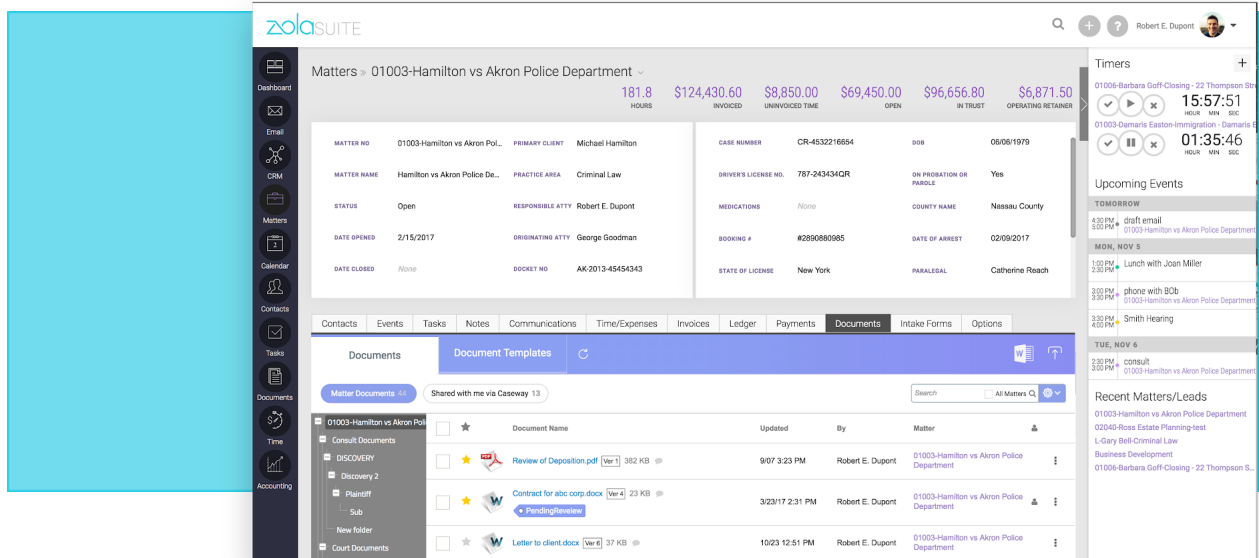
zolaSUITE



Feature Overview

Matter Management

Efficiently manage every aspect of your caseload with Zola Suite's [Matter dashboard](#) which provides a bird's eye view of financials, activity and progress on each matter.

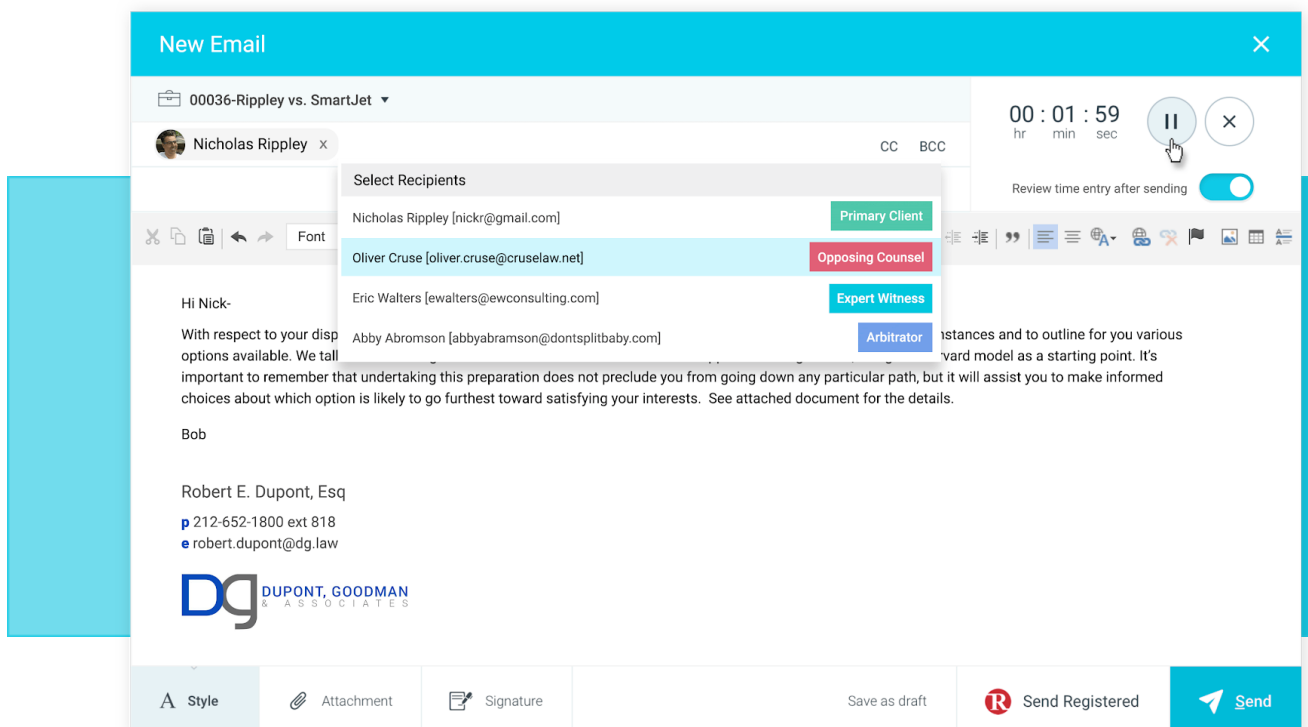


- Customize matter views with Matterscapes™ and share them with other users
- Set matter-level user permissions
- Designate matter-related contacts and roles
- Set up custom fields by practice area which can be used as merge fields for document automation
- Track audit logs
- Create User Groups
- Review matter notes and communications
- Configure default folders for documents and notes for each practice area
- Assign billing attorney, paralegal, originating attorney and responsible attorney including split origination and split responsible
- View key business intelligence metrics through the admin dashboard, available for users with Administrative permissions

Email

Manage case-related messages through your existing email account using Zola Suite's [native email client](#).

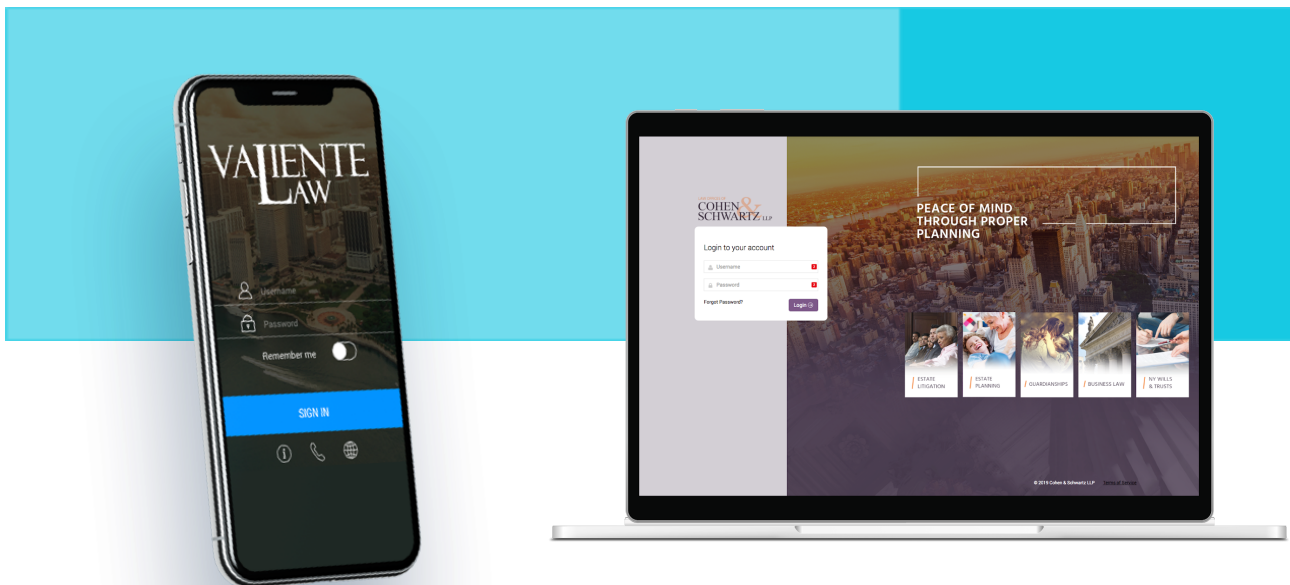
- Automatically bill for time when drafting an email
- Detect and associate inbound emails from matter-related contacts (along with their respective roles) using Zola Suite's patented Smart Suggest system™
- Convert emails to a Task with a single click
- Save emails to a Matter (no messy forwarding)
- Send secure emails with any of the following options through Zola Suite's exclusive integration with [RPOST](#): encryption, court-admissible proof of delivery, electronic signature for attached documents
- View email correspondence that were automatically saved in the matter's Communications tab. Only users who have permission can view email correspondence.
- Create a time entry upon saving an email to a matter



Secure, Integrated Client Portal

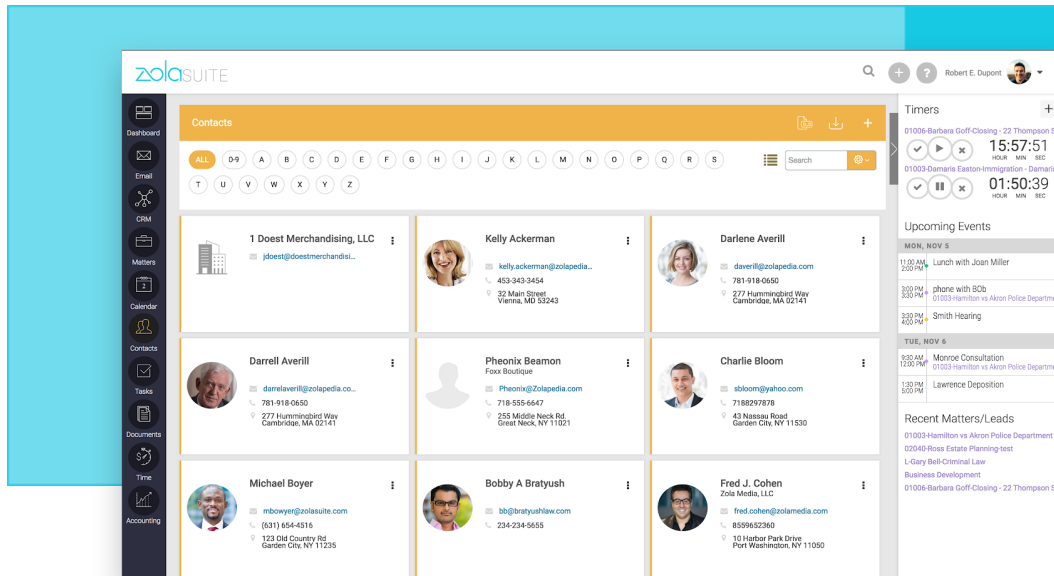
Securely share vital information with your clients through Zola Suite's secure, bank-level encryption online portal, Caseway™.

- Share documents and billing information with clients and colleagues
- Review and edit documents that your clients have uploaded to the portal and then add them to the designated Matter.
- Upload files up to 4 GBs
- Impress clients with [Zola Signature™ web portal](#), a white-label portal with immersive branding, including a custom login page and branded email notifications when new documents are added.
- Elevate your brand with [Zola Signature™ iOS and Android apps](#) (available in the Apple store and through Google Play) built with your firm's logo and branding.



Contact Management

Organize your [contacts](#) so you can easily connect with clients, prospects, referral sources, witnesses, opposing counsel and more.



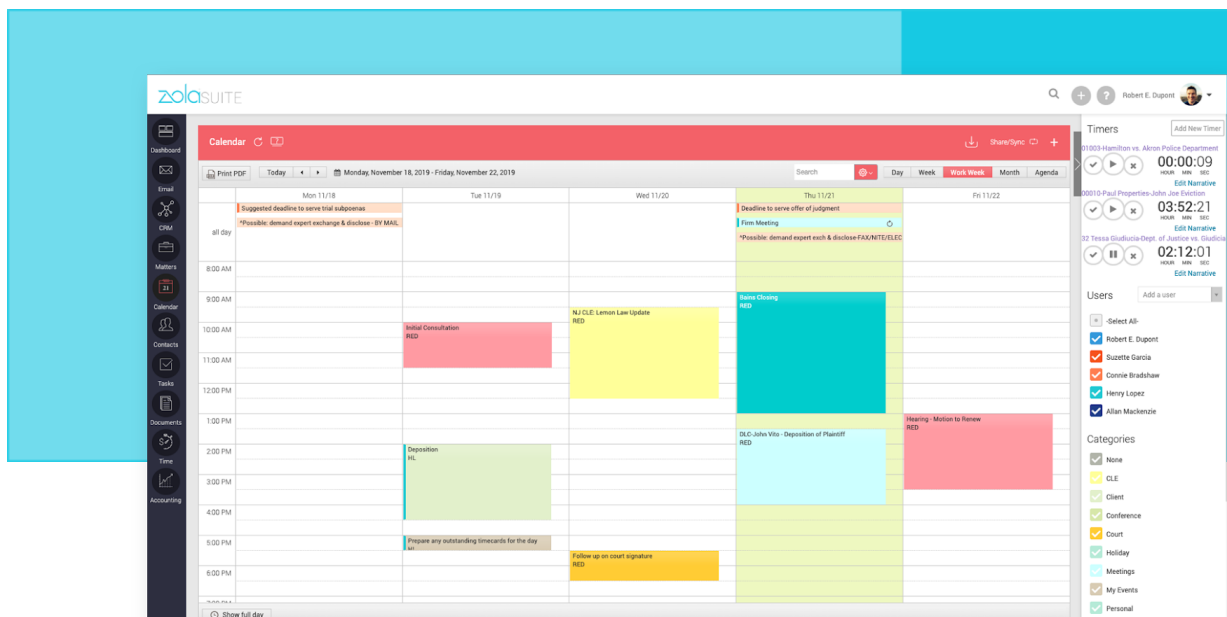
- View contact information such as name, email, phone number, address, related matter and more
- Copy contact name, company, telephone and street address with one click to the clipboard
- Create custom fields for Persons and Contacts
- Assign customized color codes to each Matter Role
- Search and filter by categories, including contact role (from a matter), contact type and person created by
- Quickly draft an email by clicking on a contact's email address
- Add contacts by simply taking a photo of a business card using Zola Suite's iOS and Android app. The business card information will be added to a contact in Zola Suite.
- Tag contacts to easily sort and export CSV lists
- Easily import and export contact information

Calendar Management

Keep track of your innumerable deadlines and appointments so you can ensure that you're in the right place at the right time.

- Automatically create time entries for each [calendar event](#)
- Create color-coded, customizable categories to designate the type of event
- Set private events that are visible to firm members only as "Available," "Busy" or "Out of the Office"
- Set up unlimited email, popup and SMS reminders
- Mark recurring events
- Follow and view your team's calendars
- Search events by combinations of owner, category, matter and date range
- Autocomplete addresses in locations
- Send real ICS invites that can be accepted or rejected by invitees
- Prefilter invitees by matter-related contacts and respective roles using patented Smart Suggest system™
- Determine future or past event dates with the option to exclude weekends and federal holidays
- Activate [rules-based calendaring](#) to monitor for rule changes and eliminate manual calculation of deadlines*

*Not available for all plans. A subscription to LawToolBox is required.



Task Management

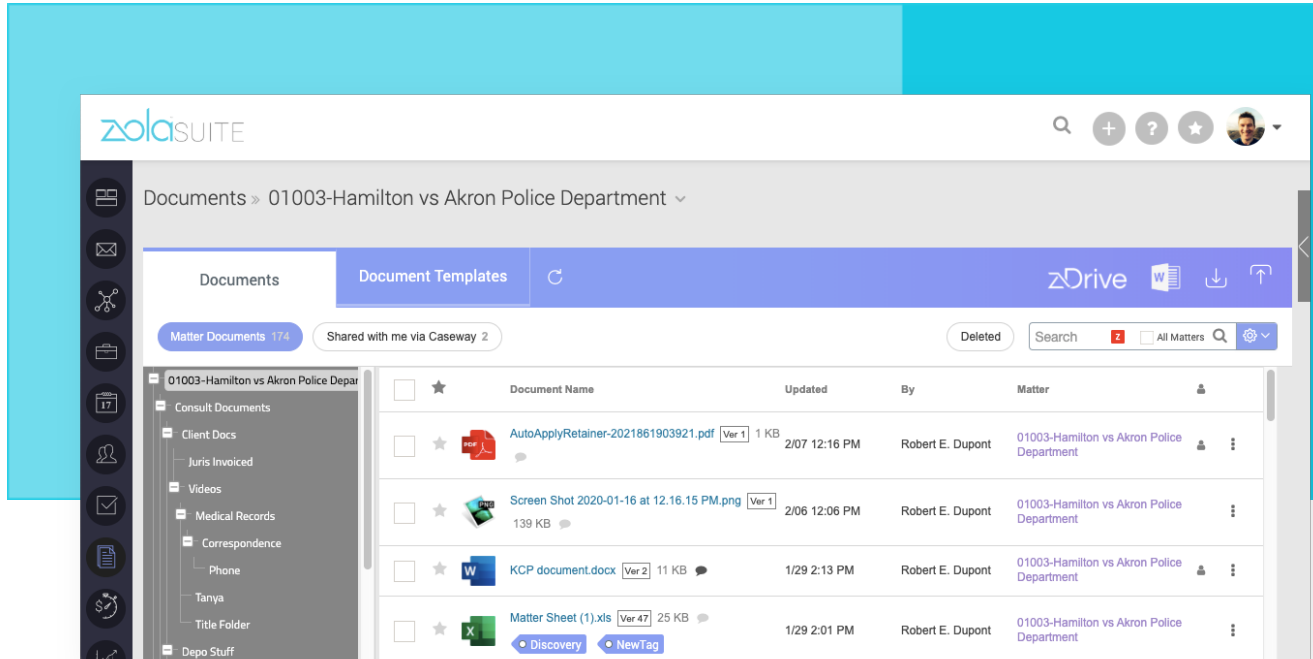
Easily track projects and delegate work while enforcing consistency and accountability.

The screenshot shows the 'New Task' form in Zola Suite. The form is titled 'New Task' and has a close button in the top right. It features a tabbed interface with 'Main', 'Attach Zola Doc', 'Recurring', and 'Sub-tasks/Task Templates'. The 'Main' tab is active. The 'TASK SUBJECT' field contains 'Review Pleadings'. The 'DESCRIPTION' field contains 'Review pleadings and send to Bob for final sign-off.'. The 'ASSIGNED TO' field lists 'George Goodman' and 'Robert E. Dupont'. The 'DUE DATE' is set to '02/17/2020 5:00 PM'. The 'MATTER/LEAD' is '01003-Hamilton vs Akron Police Dep...'. The 'STATUS' is 'In Progress'. The 'ALERT ME WHEN' section has checkboxes for 'COMPLETED' and 'PAST DUE'. The 'Add a reminder' section has three rows: 'Email' (5 Minute), 'SMS' (1 Hour), and 'Pop up' (20 Minute). The 'TAGS' field contains 'Review' and 'Follow Up'. The bottom of the form has a 'REQUIRED' indicator and three buttons: 'SAVE & CLOSE', 'SAVE & NEW', and 'CANCEL'.

- Associate [tasks](#) with a designated Matter
- View all of the tasks associated with your Matters at the click of a button
- Assign a task to members of your team. They receive notifications with each new task.
- Generate a due date and time for each task
- Set up alerts for the assigner when a task is overdue or completed
- Add SMS, email or popup reminders
- Store all of your pre-defined procedures in a single location using Task Templates. Zola Suite's Task Template system also allows you to tag, sort, filter, and create subtasks.
- Filter events by status, such as upcoming, not started, overdue, completed, etc.
- Prioritize important tasks
- Color-code tasks to designate the task category
- Attach documents
- Mark a task as recurring

Document Management

Store [documents](#) in one location for easy retrieval, editing and sharing.



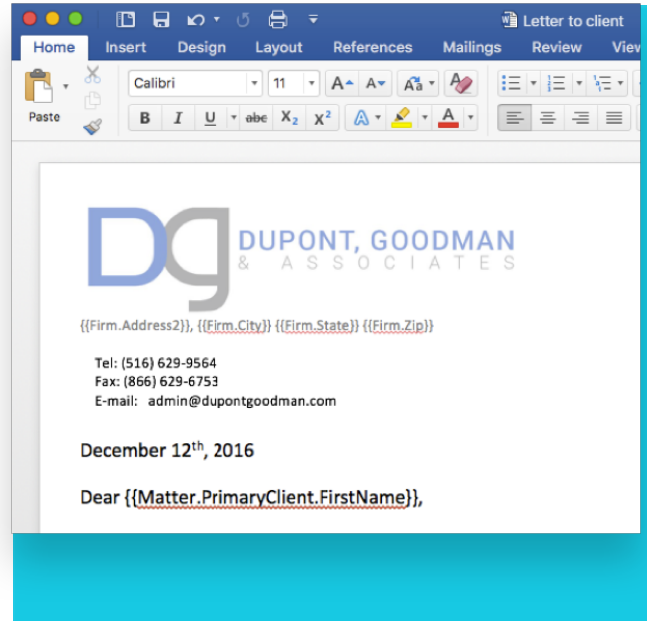
- Comment on documents or create new tags
- Create and view versions of documents
- Share documents using Zola's client portal, Caseway™
- Email documents with one click
- Open or save documents in Zola Suite without leaving Microsoft Word™ through Zola Suite's [Word™ Ribbon Plugin](#)
- Edit documents and automatically save the new version to Zola Suite using zDrive
- Create folder hierarchies
- Lock files to alert other users that you've downloaded a document for editing
- Directly save scanned documents through RICOH's Multifunction Printers into Zola Suite
- Obtain [e-signatures](#) on important documents (*limited to 5 per user per month)
- Utilize 1 TB of storage (*not available for all plans)
- Integrate with NetDocuments, the leading document management system for law firms*

*A subscription to NetDocuments is required.

Document Automation

Generate documents and correspondence with ease using Zola Suite's integrated [form builder](#).

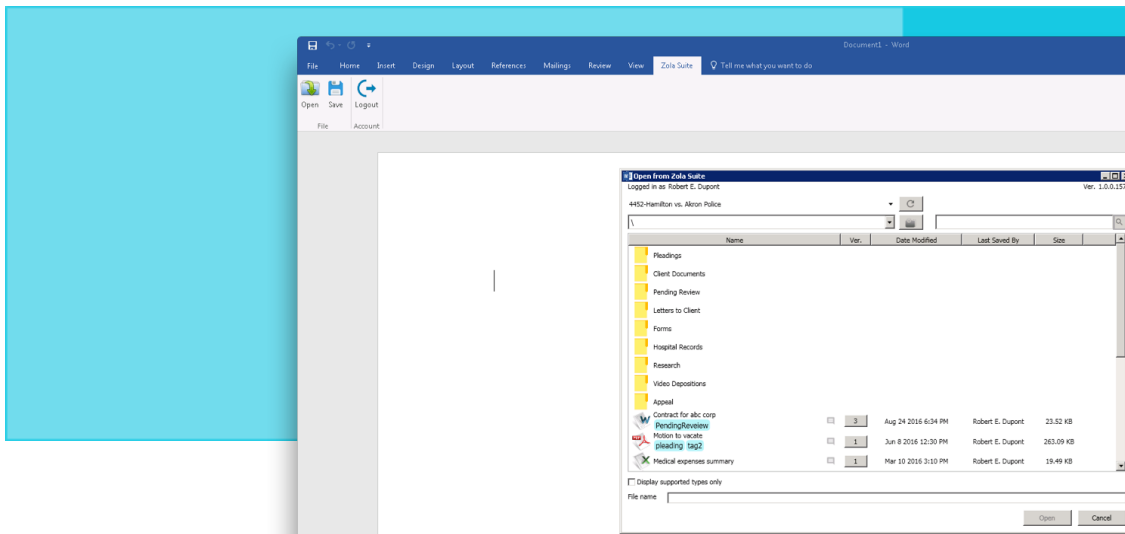
- Create commonly used document templates using Microsoft Word™ that can be used over and over again
- Electronically share intake forms with prospects



Microsoft Word Ribbon Plugin

Easily open or save documents directly from Microsoft Word into the corresponding Zola Suite Matter with [Zola's Word Ribbon Plugin](#).

- Open matter-related documents from any matter folder or subfolder stored in Zola Suite
- Save new documents or new versions of existing documents directly into matters
- View when the document was last updated, by whom and the size



CRM

[Streamline intake](#) from initial contact to retention.

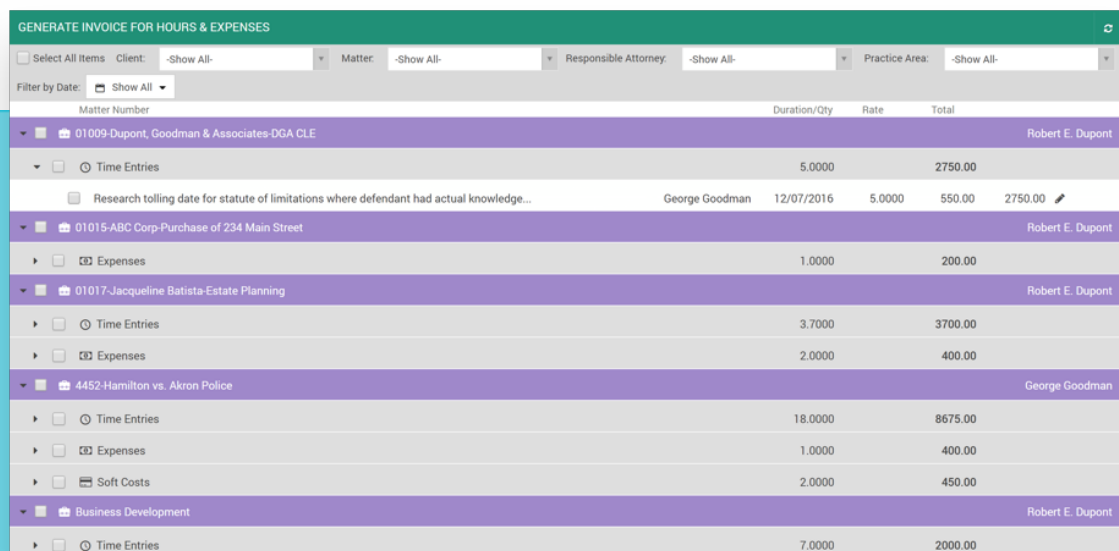


- Consolidate, organize and easily manage leads from one central location
- View dashboards and produce reports that provide insights on referral sources and which are producing the most valuable leads
- Manage leads submitted through your website's contact forms
- Securely share intake forms with leads
- Convert lead information directly into a new Matter within Zola Suite
- Create tasks, take notes and store emails to manage your prospects and pipeline

Billing & Accounting

Maximize efficiency and revenue with [powerful time, billing and complete accounting](#) features.

- Filter unbilled activities by a wide range of criteria
- Bill all unbilled activities or select entries individually
- Manage [Vendor Bills and Accounts Payable](#)
- Manually reconcile accounts to match your “books” on Zola Suite with your bank account statement through the Smart Account Reconciliation module
- Write checks and trust checks for vendors and print on standard 3-part check sheets
- Receive alerts when trust funds or operating retainers run below a pre-specified amount on a per-matter basis
- View the P&L statement for different departments or teams within your firm (*not available for all plans)
- Set up pre-billing options so the responsible attorney on the matter can review invoices before sending them out to clients for payment
- Run [accounting reports](#) that show a complete record of transactions, profit and loss, a statement of the assets, liabilities, and capital at a particular point in time, and a listing of all accounts
- Bill multiple clients on a single matter and set unique rates for each client
- [Download bank and credit card activity](#) from over 5,000 institutions
- Perform advanced features such as split billing, consolidated billing and automatic administrative fees
- Filter the Register by transaction types such as Check or Transfer
- Attach receipts when creating a check, expense or vendor bill

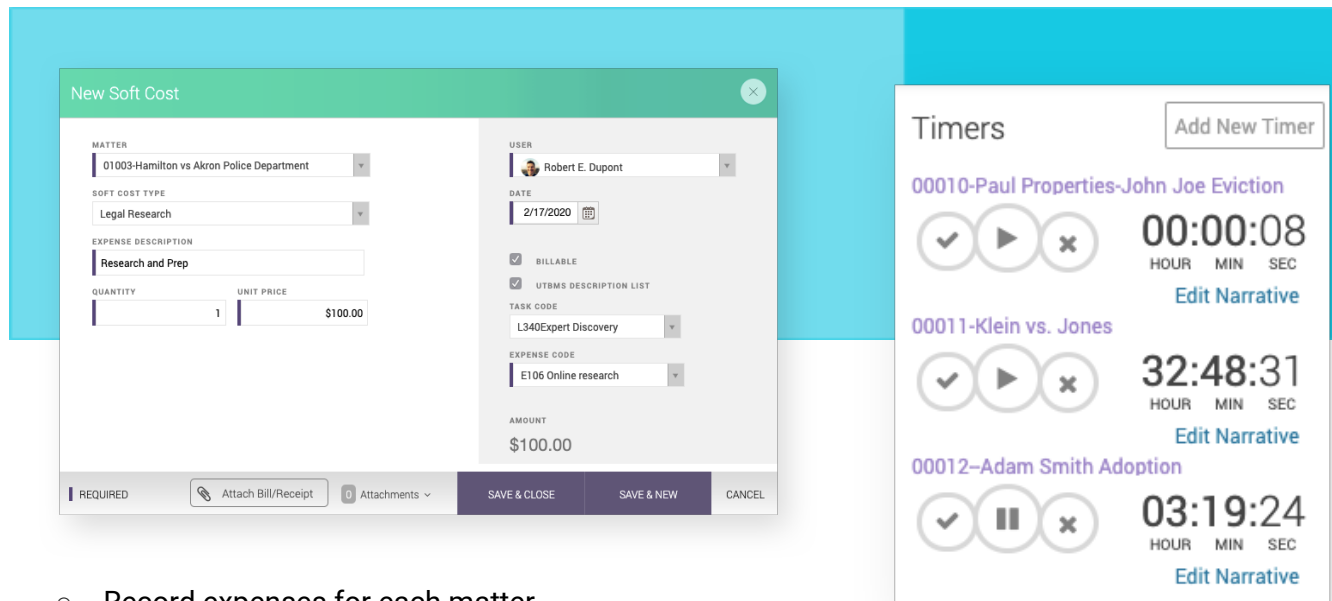


The screenshot displays the 'GENERATE INVOICE FOR HOURS & EXPENSES' interface. At the top, there are filters for 'Select All Items', 'Client', 'Matter', 'Responsible Attorney', and 'Practice Area', each with a '-Show All-' dropdown. Below these is a 'Filter by Date' section with a 'Show All' dropdown. The main table has columns for 'Matter Number', 'Duration/Qty', 'Rate', and 'Total'. The table is organized into sections for different matters, each with a purple header row. The matters listed are: 01009-Dupont, Goodman & Associates-DGA CLE; 01015-ABC Corp-Purchase of 234 Main Street; 01017-Jacqueline Batista-Estate Planning; 4452-Hamilton vs. Akron Police; and Business Development. Each matter section contains sub-entries for 'Time Entries' and 'Expenses' with their respective durations, rates, and totals.

Matter Number	Duration/Qty	Rate	Total
01009-Dupont, Goodman & Associates-DGA CLE (Robert E. Dupont)			
Time Entries	5.0000		2750.00
Research tolling date for statute of limitations where defendant had actual knowledge...	George Goodman	12/07/2016	5.0000 550.00 2750.00
01015-ABC Corp-Purchase of 234 Main Street (Robert E. Dupont)			
Expenses	1.0000		200.00
01017-Jacqueline Batista-Estate Planning (Robert E. Dupont)			
Time Entries	3.7000		3700.00
Expenses	2.0000		400.00
4452-Hamilton vs. Akron Police (George Goodman)			
Time Entries	18.0000		8675.00
Expenses	1.0000		400.00
Soft Costs	2.0000		450.00
Business Development (Robert E. Dupont)			
Time Entries	7.0000		2000.00

Time & Expense Tracking

Increase the number of hours billed each month with ten ways to track time and advanced tools to help you analyze productivity and expenses.



- Record expenses for each matter
- Create [multiple timers](#) as needed
- Enter time entry descriptions for different work types
- Automatically track time for case-related emails and phone call notes
- Designate calendar events as billable time
- Convert tasks and Activity Log entries to time entries
- Track time remotely on your iOS or Android device
- Start tracking time on your desktop and continue with your mobile device
- Choose from “No Charge” and “No Charge Don’t Show” options
- Automatically default flat fee matters to “No Charge Don’t Show” entries
- Designate round up increments (e.g. 6 minutes) on a per matter basis
- Enter time in either decimals or HH:MM
- Charge soft costs to client
- Use matter user rates and rate cards
- LEDES billing and budgeting
- Configure custom LEDES Timekeeper IDs for different users
- Track time and progress using the calendar view summary, My PastTime™
- Add and edit narratives while timers are running
- Bulk update time entries and mark them as “No Charge” or “No Charge, Don’t Show” with a single click
- Determine how partial payments are allocated between costs and individual timekeepers with custom payment allocations

Retainer / Trust Fund Management

Manage [retainers](#) for operating and/or trust accounts.

- Receive notifications when retainers fall below designated balances
- View/print ledgers on a matter basis
- View/print trust account summaries with sub-ledgers for each matter
- Create a 3-way reconciliation report for trusts

Dupont, Goodman & Associates LLP
Trust Ledger Balance Summary

BANK NAME: Trust Account
BANK ACCOUNT NAME: Trust Account
BANK ACCOUNT NUMBER: 0000
DATE: 03/26/2017

Client Ledger Balances

CLIENT NAME	MATTER NUMBER	RESPONSIBLE ATTORNEY	PRACTICE AREA	LAST DEPOSIT DATE	BALANCE AS OF 03/26/2017
ABC Corp	01011-General Business Advice	Robert E. Dupon...	Corporate	10/10/2016	\$4,000.00
Averill Daniel	01008-Darrel Averill-smith v. Jones...	Robert E. Dupon...	Business Development...	10/26/2016	\$1,500.00
Easton Damaris	01003-Damaris Easton-Immigration ...	Robert E. Dupon...	Immigration Law	8/30/2016	\$2,500.00
Goff Barbara	01006-Barbara Goff-Closing - 22 Tho...	Robert E. Dupon...	Real Estate	8/23/2016	\$4,900.00
Hamilton Michael	4452-Hamilton vs. Akron Police	George Goodman	Criminal Law	1/30/2017	\$12,955.30
Murray Donna	01002-Donna Murray-Estate of Donna ...	Robert E. Dupon...	Estate Planning	2/16/2016	\$1,600.00
Watkins Emily	01016-Emily Watkins-Watkins Closing...	Robert E. Dupon...	Real Estate	10/26/2016	\$2,370.00
Total Client Ledger Balances:					\$29,825.30

Advanced Reporting

Generate comprehensive [reports](#) and key analytics that will help you better understand the business side of your practice.

- Client Reports
 - AR Aging Summary
 - Statement of Account
 - Sales Tax
 - Client Payments
 - Matter Rate Card
- Compensation Reports
 - Referral Report
 - Originating Attorney*
 - Split Compensation*
 - Fee Allocation*
- Productivity Reports
 - Work in Progress
 - Timekeeper Productivity*
 - Billable Hours Recap
 - Timekeeper Goals
 - Billed and Collected*
 - Flat Fee Productivity*
 - Effective Rates
- Accounting Reports
 - General Ledger
 - Profit & Loss
 - Balance Sheet
 - Trial Balance
 - Chart of Accounts
 - AP Aging Summary
 - Vendor Payments*
 - Account Reconciliation
 - Write-Off*
- Trust Reports
 - Three-Way Reconciliation
 - Trust Account Ledger Summary
 - WIP-AR-Trust Report*
- Other Reports
 - Timekeeper Detail Report
 - Soft and Hard Cost Detail
 - Matter Detail including ability to filter by custom fields
 - Activity by User
 - Clients and Contacts



*Not available for all plans

Invoices

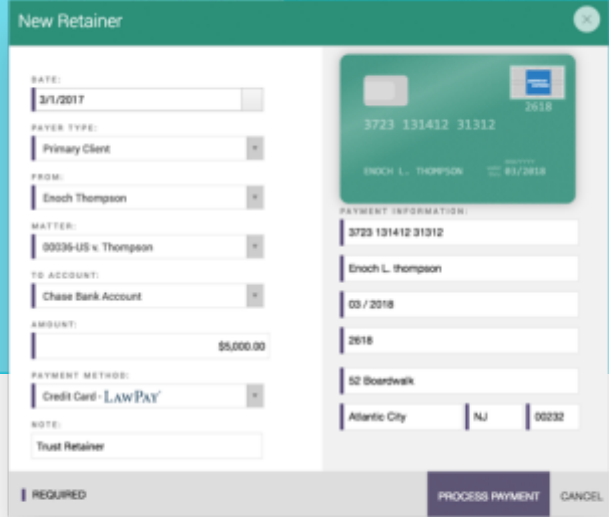
Develop beautiful [invoices](#) that will impress clients.

- Develop “retina ready,” high resolution logos
- Customize rows, columns, fonts and colors
- Add line item and invoice level discounts
- Include balances for matters and clients
- Generate consolidated invoices when there is a client with multiple matters in any given billing cycle
- Set the default invoice method by Client or Matter
- View invoice sent date
- Write off remaining balances for fees that won’t be collected
- Share invoices via Zola Suite’s secure client portal or bulk email invoices depending on client preferences
- Activate LEDES invoices (support for 1998B Alpha, Tymetrix, Litigation Advisor) and customize UTBMS codes
- Enter matter-level invoice notes
- Print and/or blast invoices (or Statement of Accounts) in bulk using the Bulk Billing Center



LawPay Integration

An efficient way for clients to make payments to your firm.



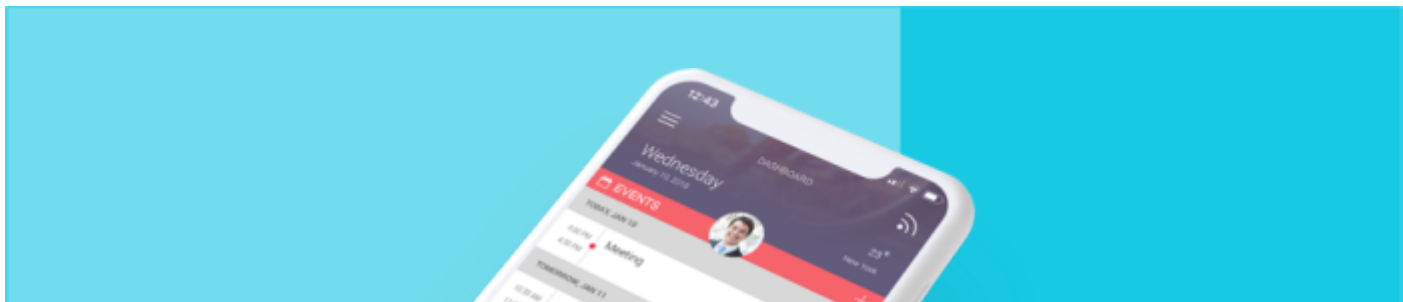
The screenshot displays the 'New Retainer' form in LawPay. The form is divided into two main sections: a left-hand input area and a right-hand summary area. The left-hand area contains the following fields: DATE (3/1/2017), PAYER TYPE (Primary Client), FROM (Enoch Thompson), MATTER (0006-US v. Thompson), TO ACCOUNT (Chase Bank Account), AMOUNT (\$5,000.00), PAYMENT METHOD (Credit Card - LAWPAY), and NOTE (Trust Retainer). The right-hand area features a credit card image for Enoch L. Thompson with card number 3723 131412 31312 and expiration date 03/2018. Below the card image, the 'PAYMENT INFORMATION' section lists the card number, cardholder name (Enoch L. Thompson), expiration date (03/2018), year (2018), address (52 Boardwalk), and zip code (Atlantic City, NJ 08232). At the bottom of the form, there are three buttons: 'REQUIRED', 'PROCESS PAYMENT', and 'CANCEL'.

- Accept credit cards using [ZolaPayments](#), powered by LawPay, for retainers or as direct payment for invoices
- Accept payments from clients through Zola's Caseway™ client portal

iOS & Android Mobile Apps

Take your practice on the road with native [iOS and Android apps](#).

- Manage matters, tasks, events, time entries, notes and documents on the go
- Send and receive email with ability to auto-create time entries and attach matter documents
- Login with TouchID and FaceID
- Scan documents with edge detection and auto-cropping
- Scan business cards and the information will be entered into the Contacts section of your Zola Suite account



Security

Safeguard what matters most.

- Optional two-factor authentication
- Secure client portal with [Two-Factor Authentication](#) and end-to-end, bank-grade encryption.
- Encrypted emails*
- HIPAA compliance for documents available via Box.com integration
- Security standards including ISO 9001, ISO 27001, SOC 1/ISAE 3402, SOC 2, and SOC 3, PCI DSS



*Up to 5 per user per month included. Contact us to learn more about additional email encryption packages.