

# Technology Products for Paralegals

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The different services and products below are provided to help lawyers explore legal technology that may assist their practice. They are examples of products available to lawyers. LAWPRO and practicePRO do not endorse third party products or services. Lawyers should consider the appropriateness of each product for their practice.

Technology can help paralegals practice more effectively and efficiently. A number of products are available that can assist with law office tasks and help paralegals provide legal advice to clients. When considering adopting a new tool, give yourself time to learn how to use it and consider watching online tutorials or other training. Be sure to consider security as well. For further resources on implementing technology tools in your practice, see our related resources at [practicepro.ca/technology](http://practicepro.ca/technology).

| <b>Calendaring</b>                |  |                          |
|-----------------------------------|--|--------------------------|
| <a href="#">Acuity Scheduling</a> | Acuity Scheduling allows users to book appointments online. Users can sync calendars to make the process even more efficient.  | <a href="#">Tutorial</a> |
| <a href="#">Calendly</a>          | Calendly lets users book meetings online without back and forth emails. Users can send their availability to other parties and let them select a mutually beneficial meeting time. | <a href="#">Tutorial</a> |
| <a href="#">Doodle</a>            | Doodle helps users book meetings by sending available time slots and allowing others to choose the best time for all parties.  | <a href="#">Tutorial</a> |

| <b>Collaboration, Task Management and Workflow Tools</b> |   |                            |
|--|---|----------------------------|
| <a href="#">Avvoka</a>                                   | Avvoka is an end-to-end document automation tool with features that include no-code automation, advanced templating, clause libraries, and workflow automation.   | <a href="#">User Guide</a> |
| <a href="#">Confluence</a>                               | Confluence is a collaborative workspace where teams and knowledge meet. It allows users to capture project requirements, assign tasks and manage several calendars at once.   | <a href="#">Tutorial</a>   |
| <a href="#">Documate</a>                                 | Documate turns template documents and forms into intelligent workflows, helping to reduce the time to generate document sets.   | <a href="#">Tutorial</a>   |
| <a href="#">Legalboards</a>                              | Legalboards allows users to visually track, organize, and manage matters. It provides tools for matter planning and progression, activity tracking, team collaboration, and integrating data.   | <a href="#">Tutorial</a>   |
| <a href="#">Microsoft Teams</a>                          | Microsoft Teams is an online hub where users can chat, meet, call and collaborate regardless of where the users are located.  | <a href="#">Tutorial</a>   |
| <a href="#">Neota Logic</a>                              | Neota Logic is an automation platform used for case intake and assessment, compliance, contract automation, managing tasks and complex processes, and expertise automation that creates web-based solutions to guide users through digital interviews, gather facts, apply reasoning to information | <a href="#">Tutorial</a>   |

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|---------------------------|--|--------------------------|
|                           | collected, and produce customized outputs.   |                          |
| <a href="#">Procertas</a> | Procertas aims to deepen relationships and improve dialogue between law firms and law departments and includes software training.  | <a href="#">Tutorial</a> |
| <a href="#">Slack</a>     | Slack is an online hub that allows users to communicate regardless of where the users are located.   | <a href="#">Tutorial</a> |
| <a href="#">Toodledo</a>  | Toodledo allows users to create lists, add notes and collaborate with family and friends. It also tracks the user's habits to help organize and allow for more efficiency. | <a href="#">Tutorial</a> |
| <a href="#">Trello</a>    | Trello is a list and progress platform that allows users to make lists and track progress as they go.  | <a href="#">Tutorial</a> |
| <a href="#">WiseTime</a>  | WiseTime is an automatic time tracking program that allocates time worked to specific clients and cases.   | <a href="#">Tutorial</a> |
| <a href="#">Zapier</a>    | Zapier automatically moves information between the apps you use to streamline processes.   | <a href="#">Tutorial</a> |

## Document Signing

|                            |  |                          |
|----------------------------|--|--------------------------|
| <a href="#">Adobe Sign</a> | Adobe Sign allows users to electronically sign documents, send documents to other people for their signatures and get automatic notifications and reminders. | <a href="#">Tutorial</a> |
| <a href="#">DocuSign</a>   | DocuSign is a platform for digital signatures.   | <a href="#">Tutorial</a> |

## Firm Management Software

|                                |  |                                |
|--------------------------------|--|--------------------------------|
| <a href="#">Clio</a>           | Clio is a cloud-based legal practice management platform. It enables law firms to track deadlines, manage cases and documents, bill clients, and accept payments.  | <a href="#">Tutorial</a>       |
| <a href="#">Cosmolex</a>       | Cosmolex is a cloud-based law practice management software that manages trust and business accounting, time-tracking, billing, email and document management, tasks and calendaring.   | <a href="#">Tutorial</a>       |
| <a href="#">Filevine</a>       | Filevine is a cloud-based case management solution for small and midsize legal firms for managing case documents, communication and file management. For Canadian clients Filevine uses Amazon Web Services' Canadian servers. | <a href="#">Tutorial</a>       |
| <a href="#">Ghost Practice</a> | Ghost Practice is an all-in-one practice management solution including case management, document management, time tracking, billing and accounting.  | <a href="#">Request a Demo</a> |
| <a href="#">iManage</a>        | iManage combines artificial intelligence, security and risk mitigation with document and email management. It can be configured to have data stored on Canadian servers.   | <a href="#">Tutorial</a>       |

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|--------------------------------------|---|---|
| <a href="#">Matter365</a>            | Practice management software that fully integrates into Office365.  | <a href="#">Tutorial</a>  |
| <a href="#">PCLaw   Time Matters</a> | PCLaw   Time Matters offers two practice management solutions (which may be used separately or together). PCLaw is an all-in one practice management solution providing matter management, billing and accounting solution software. It tracks trust accounting, client management, tracks billable hours, billing and accounting. Time Matters is a case matter practice management program, including contacts, email, documents, research, and matter management. It integrates with a variety of other software products. | <a href="#">Tutorial - PCLaw</a><br><a href="#">Tutorial - Time Matters</a> |
| <a href="#">Soluno</a>               | Soluno is a time, billing and accounting solution for law firms. (Not available for Mac/OSX)  | <a href="#">Tutorial</a>  |
| <a href="#">Worldox</a>              | Worldox is a document management system with document profiles, full-text searching and collaboration.  | <a href="#">Tutorial</a>  |

## Note Taking

|                                   |   |                          |
|-----------------------------------|---|--------------------------|
| <a href="#">Evernote</a>          | Allows users to take notes, find information, save web pages, create to-do lists and share ideas with others.                           | <a href="#">Tutorial</a> |
| <a href="#">iAnnotate</a>         | iAnnotate is an app by Folia that allows users to markup PDF files with highlighting, diagrams, notes and audio comments.               | <a href="#">Tutorial</a> |
| <a href="#">Microsoft OneNote</a> | Microsoft note taking software allows users to create notes, set tasks and manage their affairs.  | <a href="#">Tutorial</a> |
| <a href="#">Notability</a>        | Notability allows users to combine handwriting, photos and typing, all in one note. Users can also add and annotate PDFs in Notability. | <a href="#">Tutorial</a> |
| <a href="#">Otter.ai</a>          | Otter.ai is an AI transcription assistant, which creates voice notes from meetings, interviews, and other conversations                 | <a href="#">Tutorial</a> |

## Payment Solutions

|                                 |  |                          |
|---------------------------------|--|--------------------------|
| <a href="#">LawPay</a>          | LawPay provides a payment management solution that separates earned and unearned accounts. LawPay also organizes payments coming through from clients. | <a href="#">Tutorial</a> |
| <a href="#">Square</a>          | Square is a hardware device that allows the user to accept any payment method, including credit card or debit, using tap and chip & PIN.               | <a href="#">Tutorial</a> |
| <a href="#">Stripe Payments</a> | Stripe Payments is a complete payments platform that accepts payments and moves money globally using APIs and software solutions.                      | <a href="#">Tutorial</a> |

| <b>Security</b>                         |  |                           |
|---|--|---------------------------|
| <a href="#">1password</a>               | 1Password provides a place for users to store various passwords, software licenses, and other sensitive information in a virtual vault. Canadian users who sign up at 1password.ca have their information stored on Canadian servers.      | <a href="#">Tutorial</a>  |
| <a href="#">Authy</a>                   | The Authy app generates secure 2 step verification tokens on your device. It helps users protect their account from hackers and hijackers by adding an additional layer of security.   | <a href="#">Tutorials</a> |
| <a href="#">BitLocker</a>               | BitLocker is a built-in feature to certain Microsoft software, designed to protect data by encrypting entire volumes. BitLocker locks the entire operating system partition and requires a specialized key to unlock the operating system. | <a href="#">Tutorial</a>  |
| <a href="#">Lastpass</a>                | LastPass saves and remembers your passwords and is accessible throughout all the user's devices.   | <a href="#">Tutorial</a>  |
| <a href="#">Microsoft Authenticator</a> | Microsoft Authenticator protects all of your accounts with two-step verification. The app also helps you secure all of your online accounts by using the industry standard time-based OTP (one-time password) codes.                       | <a href="#">Tutorial</a>  |

| <b>Social Media &amp; Marketing</b> |  |                          |
|-------------------------------------|--|--------------------------|
| <a href="#">Canva</a>               | Canva is a graphic design platform with design features for presentations, calendars, graphs, planners, letterheads, business cards, and more. | <a href="#">Tutorial</a> |
| <a href="#">Hootsuite</a>           | Hootsuite is a social media management platform where users can manage all their social media accounts from one place.                         | <a href="#">Tutorial</a> |

| <b>Surveys and Form Building</b> |  |                          |
|----------------------------------|--|--------------------------|
| <a href="#">Google Forms</a>     | Google Forms is a survey administration application. Forms collect information from users via a personalised survey or quiz. | <a href="#">Tutorial</a> |
| <a href="#">Simple Survey</a>    | Simple Survey is a Canadian based survey and form creation tool, with data hosted in Canada.                                 | <a href="#">Tutorial</a> |
| <a href="#">SurveyMonkey</a>     | SurveyMonkey provides free online survey tools.  | <a href="#">Tutorial</a> |
| <a href="#">Typeform</a>         | Typeform provides software that specializes in online form building and online surveys.                                      | <a href="#">Tutorial</a> |

| <b>Telephone, Internet and Fax</b> |   |                          |
|------------------------------------|---|--------------------------|
| <a href="#">Ubyty</a>              | Ubyty provides cloud-based telephone services and fax and voicemail services.     | <a href="#">Tutorial</a> |
| <a href="#">Vonage</a>             | Vonage offers, phone service, internet and paperless fax, amongst other services. | <a href="#">Tutorial</a> |

| <b>Video Conference Software</b> |  |                          |
|----------------------------------|--|--------------------------|
| <a href="#">GoToMeeting</a>      | GoToMeeting allows users to join, host or manage a meeting through video conferencing.   | <a href="#">Tutorial</a> |
| <a href="#">Skype</a>            | Skype enables individuals and businesses to make free video and voice calls, send instant messages and files to each other.                | <a href="#">Tutorial</a> |
| <a href="#">Zoom</a>             | Zoom provides video conferencing software. Multiple users can share their screens concurrently and co-annotate for collaborative meetings. | <a href="#">Tutorial</a> |

| <b>Voice Dictation and Transcription</b>  |  |                          |
|---|--|--------------------------|
| <a href="#">Dragon Speech Recognition</a> | Dragon allows professionals to dictate and the software will automatically assess and transcribe what is dictated to a document. | <a href="#">Tutorial</a> |
| <a href="#">Microsoft Word</a>            | Word for Microsoft 365 dictation allows for speech-to-text using your microphone.  | <a href="#">Tutorial</a> |
| <a href="#">SpeechExec</a>                | SpeechExec is a speech-to-text dictation and transcription software.   | <a href="#">Tutorial</a> |

| <b>Writing and Editing</b>   |  |                          |
|------------------------------|--|--------------------------|
| <a href="#">Grammarly</a>    | Grammarly assists writers to produce clean and mistake-free writing and offers suggestions that go beyond just grammar.  | <a href="#">Tutorial</a> |
| <a href="#">TextExpander</a> | TextExpander lets users instantly insert snippets of texts from a database of emails, boilerplate and other content, concurrently as the user types.                           | <a href="#">Tutorial</a> |
| <a href="#">WordRake</a>     | WordRake is an automated, in-line, editing software. WordRake can make documents or emails clearer, shorter and better overall. It can be added to Microsoft Word and Outlook. | <a href="#">Tutorial</a> |

## **Tools for Specific Areas of Law**

| <b>Litigation</b>         |  |                          |
|---------------------------|--|--------------------------|
| <a href="#">CaseFleet</a> | CaseFleet allows lawyers to manage litigation files and organize facts, issues, and sources. | <a href="#">Tutorial</a> |

|                            |   |                          |
|----------------------------|---|--------------------------|
| <a href="#">Citeright</a>  | Citeright is a legal research tool that allows users to save the research they have done and lives in Microsoft Word as an add-on.  | <a href="#">Tutorial</a> |
| <a href="#">Evichat</a>    | Evichat provides a service that organizes messages for users, specifically for evidentiary needs. It can handle messaging between users and organize messages, such as websites and other evidence, helping declutter messages.                               | <a href="#">Tutorial</a> |
| <a href="#">Logikull</a>   | Logikull is an e-discovery platform that organizes evidence the parties intend to use.  | <a href="#">Tutorial</a> |
| <a href="#">Page Vault</a> | Page Vault helps legal professionals capture web content, such as Facebook, videos, and websites, and creates an easy-to-print PDF.   | <a href="#">Tutorial</a> |
| <a href="#">Primafact</a>  | Primafact is a document management software for litigation practice.  | <a href="#">Tutorial</a> |
| <a href="#">TrialPad</a>   | TrialPad allows users to store and access documents from their iPad. It includes presentation tools, highlights text, creates side-by-side document comparisons, edits and shows video clips, adds exhibit stickers to documents and searches document texts. | <a href="#">Tutorial</a> |

***This document was initially developed by Juda Strawczynski, Director, practicePRO and Eli Goldberg, Articling Student, and has been subsequently updated.***

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