

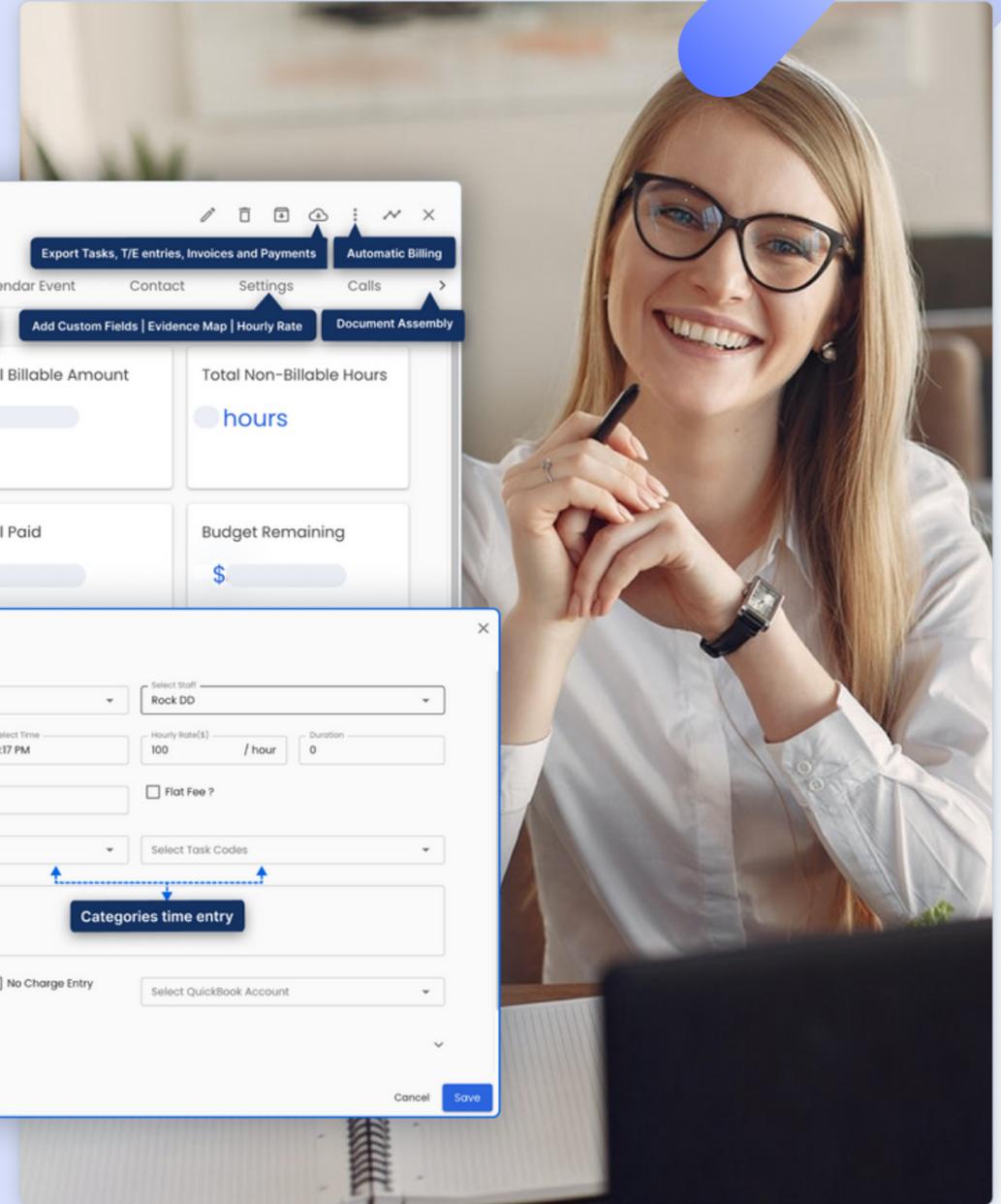
CASEFOX OFFERINGS

www.casefox.com



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The image displays the Casefox software interface. On the left is a sidebar menu with options like Dashboards, Calendar, Tasks, Cases, Clients, Time/Expense, Billing, Accounts, Ledger, Communication, Leads, Vendors, Reports, and Settings. The main area shows a dashboard for a case titled "Syndicate Bank Robbery 2" (Ref# 20230005). It features several summary cards: Total Unbilled (with a "Quick Bill" button), Total Billable Time (in hours), Total Billable Amount, Total Non-Billable Hours, Total Non-Billable Amount, Total Billed, Total Paid, and Budget Remaining. Below these are sections for "Billed/Invoices", "Payment Terms", "Late Interest Rate", "Number of Invoices", "Unpaid Invoices", and "Billable Expense Entered". A "New Time Entry" modal form is open in the foreground, containing fields for "Select Cases", "Select Staff" (Rock DD), "Date" (Feb 28, 2023), "Select Time" (11:17 PM), "Hourly Rate(\$)" (100 / hour), "Duration" (0), "Case(\$)" (0), "Flat Fee?", "Select Activity Codes", "Select Task Codes", "Description", "Non-billable", "No Charge Entry", "Select QuickBook Account", and a "Private Note" field. A callout box labeled "Categories time entry" points to the "Select Activity Codes" and "Select Task Codes" dropdowns.



About Us



OUR MISSION

To improve the working practices of the world's most trustworthy and renowned profession



OUR VISION

To make legal practices adaptable and sustainable



PLATFORM

CaseFox is an end-to-end law firm management solution



SERVICES

Using 12+ years of industry expertise to deliver vertical targeted solutions



We Understand Industry Challenges



An improper case, client, and invoice management leading to missed deadlines and billing errors.



Unstructured task allocation leading to delay on deliverables



Impracticable performance reporting and financial visibility



Law firms often spend long hours on administrative and daily tasks leading to loss of revenue



Low technology adoption for routine tasks leading to increase in staff costs



Inefficient communication channels leading to delay and opacity causing trust issues with clients



Committed to Legal Innovation



Efficient time and expense tracking



Personalized invoicing



Visibility on receivables and profitability



Detailed case management



Anytime, anywhere access

CaseFox is a modernized legal software to manage cases, clients, billing, & documents. We serve attorneys, CPAs, consultants, investigators, and other practitioners. CaseFox has helped thousands of legal professionals & law firms to digitize and automate their operations.

 **Guided and collaborative**

 **Enhanced cashflow**

 **Operational excellence**

 **Client satisfaction**

 **Performance driven**

 **Reduction in employee burnout**

Compelling CaseFox Features

From cases to clients, timekeeping to invoicing, manage everything in the best way



01.

Case
Management



02.

Time/Expense
Tracking



03.

Accounting



04.

Billing/
Invoicing



05.

Task
Management



06.

Document
Management

Some more CaseFox features

From cases to clients, timekeeping to invoicing, manage everything in the best way



07.

**Client
Management**



08.

**Vendor
Management**



09.

**Online
Payments**



10.

Reports



11.

**Legal
Calendaring**



12.

**Staff
Management**

Case Management

Create and manage matter detail - documents, contacts, calendars, emails, tasks - are available in a single organized location. Track matter in real-time..

The screenshot displays the Case Management software interface. On the left is a navigation sidebar with options like Dashboards, Calendar, Tasks, Cases, Clients, Time/Expense, Billing, Accounts, Ledger, Communication, Leads, Vendors, Reports, and Settings. The main area shows a dashboard for a specific case, 'Syndicate Bank Robbery 2'. At the top, there are tabs for Dashboard, Time/Expense, Billing, Document, Calendar Event, Contact, Settings, and Calls. Below the tabs are several key metrics: Total Unbilled (with a 'Quick Bill' button), Total Billable Time (in hours), Total Billable Amount, Total Non-Billable Hours, Total Non-Billable Amount, Total Billed, Total Paid, and Budget Remaining. A 'Billed/Invoices' section at the bottom lists various financial and operational metrics such as Payment Terms, Amount Not Billed Yet, Late Interest Rate, Interest Received, Number of Invoices, Total Invoice Discounts, Unpaid Invoices, Total Written Off, Billable Expense Entered, and Total No Charge Hours. Callout boxes highlight features like 'Quick Bill | LEDES/UTBMS Based Invoicing | Bulk Record Payments', 'Export Tasks, T/E entries, Invoices and Payments', 'Automatic Billing', 'Syncs with top cloud storage providers', 'Add Custom Fields | Evidence Map | Hourly Rate', and 'Document Assembly'.

✓ Dashboard

From case summary, responsible attorneys, billing details, staff-wise billing details to client details, documents, communication details, all the details are at one place

✓ Calendar

Appointments, events, hearing dates, and important deadlines are managed.

✓ Document management

Manage your important tasks by assigning to yourself and your team, and setting priorities, and reminders.

✓ Quick time entry

Time entries are generated.

✓ Quick billing

Invoices are generated for single/multiple time entries.

Time and Expense Tracking

Casfox's Time and Expense tracking feature allows users to accurately track and report time spent and expenditure incurred on each case.

Desktop timer for quick time entry

Conflict Check Search 00:25:59 [Pause] [Refresh] [Clock] + Create New [Envelope]

Time/Expense Entries

Showing All Time Entries Tap to Filter time/expense entry based on Staff, Case, Client, Date, Invoice Status

+ New Time Entry + New Expense Entry

Type	Date	Description	Case	Client	Qty	Rate	Cost	Staff	Invoice Status
								RS	Unbilled

Update/Delete/Move(to another case) Time/Expense entry

New Time Entry

Select Cases [Dropdown] Select Staff Rock DD [Dropdown]

Date Feb 28, 2023 Select Time 11:17 PM Hourly Rate(\$ 100 / hour Duration 0

Cost(\$ 0 Flat Fee ?

Select Activity Codes [Dropdown] Select Task Codes [Dropdown]

Description [Text Area]

Non-billable No Charge Entry Select QuickBook Account [Dropdown]

Private Note Add Private Note

Cancel Save

Import time entry

Export time/expense entry

App Store Notifications 2 Rock DD Administrator

Firm Dashboard User Dashboard

Today Billable Hours 5.00 hours Billable Amount

✓ **Create time & expense entry**
Solution provides easy recording and tracking of hours worked on an assigned case.

✓ **Manage multiple timers at once**
To accurately capture time, CaseFox's timers can be started from several locations. Start and stop time tracking, ensuring accurate capture of billable hours.

✓ **Categorize entries**
To benchmark your billing performance and further improve billing, attach UTMBS codes to your time and expense entries.

✓ **Mark entries as billable and non-billable**
Time/expense entries can be classified as billable and non-billable for tracking how much non-billable work is being done.

✓ **Set customized rates**
Attach custom rates to time entries, matters, clients, activity categories, or users. Automatically, round up entries to the increment that makes sense for your firm.

✓ **Import & Export**
Time/expense entries can be exported in pdf and excel.

Billing

Casefox delivers faster invoicing methods with features like automated billing, efficient invoice tracking, and bulk generate invoices.

The screenshot displays the CaseFox Billing interface. The main view shows a table of bills with columns for Case, Client, Bill Amount, Paid, Balance, Over Due, and Status. A modal window titled 'Generate Bill' is open, allowing users to select a client (Amelia's Company), case (All Cases), primary responsible person (All Staff), and invoice date (Mar 01, 2023). The modal also includes options for tax/VAT rates and discounts. A callout box points to the 'Generate Bill' modal with the text 'Bulk Generate invoice for a specific period'. Other callouts highlight features like 'Customize template', 'Download invoices in PDF/Word/LEDES Bill', 'Mark Invoices as Draft/Unpaid(Final), Paid', 'Email Invoice and Record Payment', and 'Preview Invoices'.

Case	Client	Bill Amount	Paid	Balance	Over Due	Status
Show inc murder Case	Reetu Show (Show inc)	\$1,010,101.00	\$0.00	\$1,010,101.00	0 Days	Unpaid
Syndicate Bank Robbery 2	Simran Singh (Abott)	\$0.00	\$0.00	\$0.00	0 Days	Paid
The Lady in Pink	Sherlock Holmes (Sherlock Holmes)	\$5,893.28	\$0.00	\$5,893.28		
Syndicate Bank Robbery 2	Simran Singh (Abott)	\$11,000.00	\$10,407.00	\$593.00		
Syndicate Bank Robbery 2	Simran Singh (Abott)	\$0.00	\$0.00	\$0.00		

Generate Bill

Select Client: Amelia's Company (Amelia Brown)

Select Case: All Cases

Primary Responsible Person: All Staff

Tax/VAT Rate: 0 %

Discount: 0 %

From Date: [] To Date: [] Invoice Date: Mar 01, 2023

No Tax/VAT on Expense No Discount on Expense

Cancel Save

- ✓ **Generate invoices**
Invoices are generated for a specified period, CaseFox supports bulk invoice generation
- ✓ **Multilingual Invoices**
Create and send invoices in multiple languages. Speak your customer's language and add a personal touch to your legal invoices
- ✓ **Preview and finalize invoices**
Invoices are reviewed and are marked as Draft/Unpaid(final)//Paid).
- ✓ **Email Invoices**
Invoices are emailed to clients post drafting a mail on customized template within CaseFox.
- ✓ **Record payments**
Payments are recorded as fully/partially paid or written-off.
- ✓ **Download bill**
Invoices are downloaded in PDF/word and LEDES billing format
- ✓ **Add discount, VAT, or tax rates**
Easily apply discounts and credit notes to bills, or convert time entries to no-charge. In addition, you can quickly write off full or partial bill amounts as necessary.

Document Management

CaseFox offers real-time document management with easy usability & robust operatives

The screenshot shows the CaseFox interface for a case named 'Syndicate Bank Robbery 2' (Ref# 20230005). The interface includes a sidebar with navigation options like Dashboards, Calendar, Tasks, Cases, Clients, Time/Expense, Billing, Accounts, Ledger, Communication, Leads, Vendors, Reports, and Settings. The main content area is titled 'Cases' and shows a list of cases with details for 'Accounting/Legal' and 'Advertising' cases. The 'Document' tab is active, displaying a file management interface with a search bar, an 'Upload File' button, and a list of files. A table lists files with columns for File Name, Uploaded at, and File Size. Below the table, there are logos for CaseFox, One Drive, Google Drive, Dropbox, and Box. Callouts highlight features like 'Integrates with leading cloud storage providers', 'Access time entry documentation under cases', 'Locate documents', 'Download files in a click', and 'Upload local files to cloud'.

File Name	Uploaded at	File Size
Battery Extender Circuit.Png	February 4, 2023	483.257 KB
Screenshot 2023-02-22 At 7.07.28 PM.Png	February 23, 2023	223.286 KB
Screenshot 2023-02-24 At 12.43.58 PM.Png	February 23, 2023	373.991 KB

✔ **Store documents with CaseFox Drive**
With CaseFox storage, you can save thousands of files, including documents, images, audio, and video files. Plus, our automatic backup feature ensures your files are always safe and secure.

✔ **Document templates**
Document Templates Document templates in CaseFox are used to quickly and efficiently draft documents that are used across multiple matters. Auto-fill files and converts existing Word files into reusable online templates.

✔ **Search files in seconds**
Search field provides easy navigation to documents.

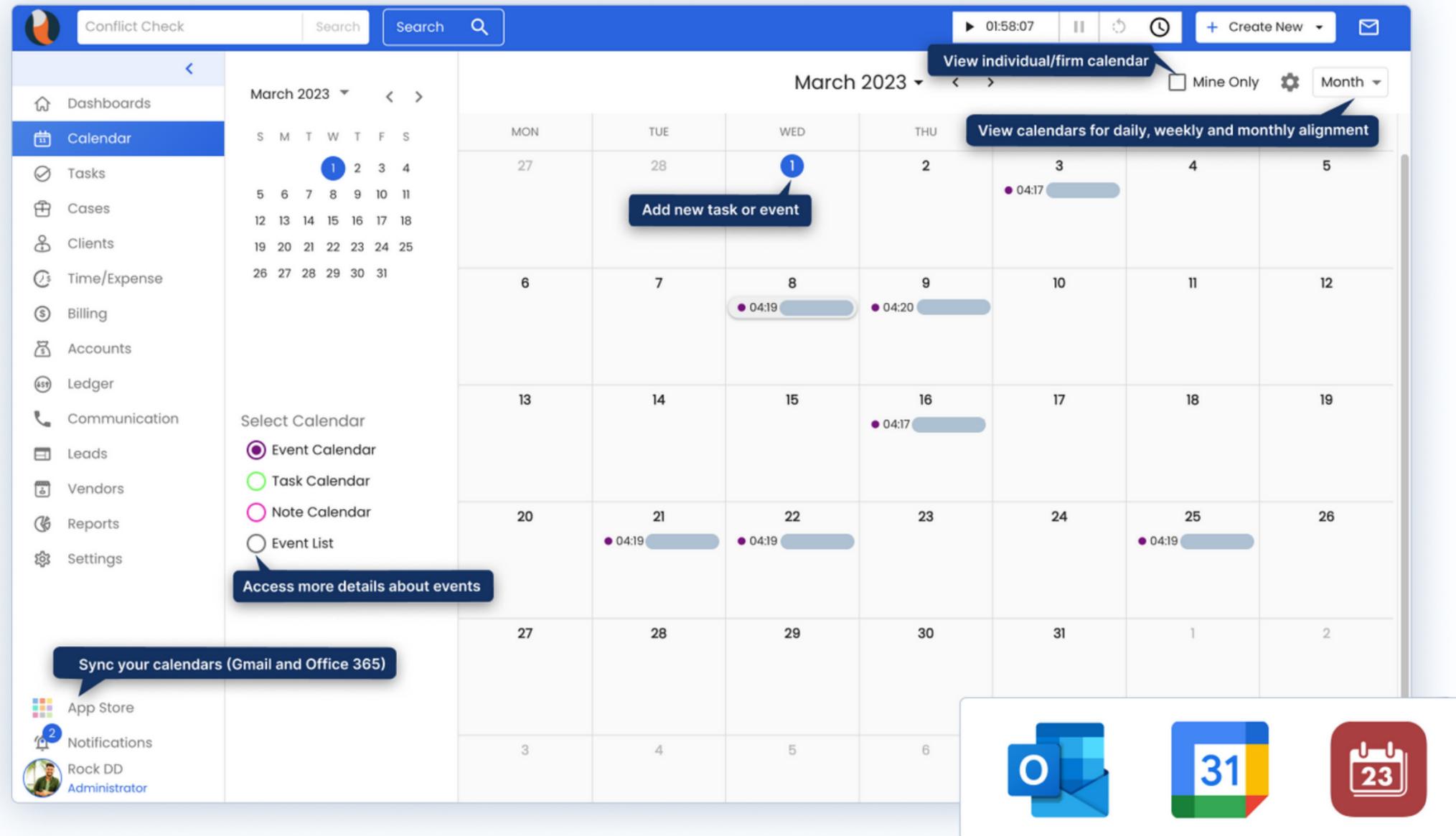
✔ **Export documents**
Documents are downloaded to local devices.

✔ **Import documents**
Documents are uploaded from local devices to integrated cloud storage.

✔ **Integrates with leading cloud storage providers**
CaseFox integrates with Office 365, Google drive, Dropbox, Box, and CaseFox's cloud storage.

Calendar

Now enjoy one-click conflict check and save time in getting secured results.



✓ Set Reminders

Never miss your calendar events by notifying your attendees about the meeting.

✓ Rule-based calendaring

Automatically track court deadlines by setting up rules based on jurisdiction and event type. Easily find related court events for a specified jurisdiction and add those dates to your calendar.

✓ Multiple calendars

Documents are downloaded to local devices.

✓ Calendar view

Documents are uploaded from local devices to integrated cloud storage.

✓ Create events

Search field provides easy navigation to documents.

✓ Integrations

CaseFox integrates with Google Calendar, Outlook, and iCal Format

Workflow Management

Efficiently manage your workflow with CaseFox. Track cases, performance, set reminders, and more.

- Track cases, documents and payment details
- Manage team roles and collaborations
- Streamlined automation
- Tasks transparency
- Track performance
- Set reminders to meet deadlines in time

Client Management

Manage your clients from a compact dashboard. Experience faster pay, customized intake forms, and data exports

- Personalized dashboard
- Record unpaid invoices
- Update clients on a click
- Single URL of client portal
- Secure access to invoice details
- Quicker Payments
- Payment history

Accounting

Manage Trust Accounts and Operating accounts securely. Manage IOLTA accounting and other interesting features such as -

- Bulk invoice generation
- Easily manage multiple trust accounts
- Add and withdraw funds securely
- Work on IOLTA accounting
- Secure operating accounts
- Manage funds easy and fast
- View all your records on a single page

Vendor Management

Have a centralized vendor management portal to easily manage vendors.

- Complete record of vendors in a centralized place
- Quick vendor search
- Easily manage multiple vendors
- Detailed vendor information
- Quickly add and update the vendor information
- Track and access vendor information in seconds

Online Payments

Receive and Pay Online Payments via a secure channel and maintain details of every transaction you do.

- Secure dashboard
- Integration with PayPal
- Separate client URL
- Credit card processing
- Detailed invoice report
- Secure messages
- Request appointment anytime

Reports

Now enjoy one-click conflict check and save time in getting secured results.

Reports allow users to generate comprehensive summaries of information related to cases, clients, productivity, tasks, and events and to make more informed decisions based on the data.



Who Can Use CaseFox in Your Law Firm?

CaseFox is open for legal professionals, finance teams and consultants. Whether you're a solo practitioner, a small-sized law firm, mid-sized law firm, or an enterprise. We have solutions for all.



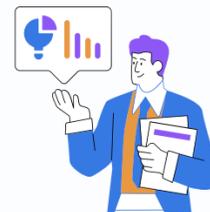
Administrator

- Partners
- President
- Of-Counsel
- Senior Counsel
- Defense Attorney
- Gov. Relation Specialist



Contract Staff

- Associate
- Legal Assistant
- Paralegal
- Intern
- Mediator



Normal Staff

- Psychologist
- Therapist
- Engineer
- Professional
- Law Clerk
- Assistant
- Intern



Consulting Staff

- Tax Consultant
- Corporate Consultant
- Gov.Relation Specialist
- Consultant
- Counselor



Office Secretary

- Associate
- Legal Assistant
- Paralegal
- Intern
- Mediator

Success Stories – CaseFox

Time and case management for a mid-sized law firm.

A litigation, trial, and appellate firm with over 30 users, 3,000 + cases, and 150 + clients were facing usability and scalability challenges with their previous solution provider leading to poor organization, lack of transparency, and limited functionality leading to delays on deliverables impacting productivity, communication, and remote working.

The client required an efficient case management and billing solution to streamline their operations, CaseFox provided a centralized platform for storing and managing all case-related information, including client details, case documents, court dates, and deadlines, with improved collaboration, better client service and billing, the firm was able to attain efficiency, optimize cash-inflow and stay compliant with legal and regulatory requirements. The automation of routine tasks such as scheduling court dates and sending reminders about deadlines allowed the firm to focus on more important tasks such as legal research and strategy. Overall, CaseFox helped the firm to operate more efficiently and provide better service to its clients.



Reduction in time spent on case and document management



Reduction in process delays



Reduction in employee burnout

Why CaseFox?

- ✓ Scalable
- ✓ Flexible & Sustainable
- ✓ Real-time performance tracking
- ✓ Non-intrusive UI and rapid usability
- ✓ Accessibility

“Amazing, cost-effective case management and billing software”



We have tried out literally 4-5 different practice management software solutions over the years, and we have finally found one that is simple, straightforward, and cost-effective. We love it.

User-friendly, intuitive, easy to fix mistakes...and, of course, the price.



Christie Ryan
-(Ryan Law)

Committed to Legal Innovation



Efficient time and expense tracking



Personalized invoicing



Visibility on receivables and Profitability



Detailed case management



Anytime, anywhere access

CaseFox is a modernized legal software to manage cases, clients, billing, & documents. We serve attorneys, CPAs, consultants, investigators, and other practitioners. CaseFox has helped thousands of legal professionals & law firms to digitize and automate their operations.

 **Guided and collaborative**

 **Enhanced cashflow**

 **Operational Excellence**

 **Client satisfaction**

 **Performance driven**

 **Reduction in employee burnout**

Committed to Legal Innovation



Efficient performance reporting



Detailed case management



Manage multiple locations



Anytime access



Mature document management



Multiple languages supported

MatterSuite is a customized legal solution to manage clients, cases, evidence & documents. Our law firm software serve biglaws, midlaws, and enterprise level law firms. MatterSuite has helped thousands of legal professionals & law firms to digitize and automate their legal operations.

 **Guided and collaborative**

 **Enhanced cashflow**

 **Operational excellence**

 **Client satisfaction**

 **Performance driven**

 **Reduction in employee burnout**

Plans & Pricing

Presentations are communication tools that can be used as lectures, speeches, reports, and more.

Billed Annually

Billed Monthly

SOLO 

\$0
Free Forever

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Ideal for new legal solos & first movers

PRO 

\$35
per user/month USD

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Ideal for proactive practitioners, small & mid-sized law firms

PRO 

\$39
per user/month USD

[Buy Pro](#)

Ideal for proactive practitioners, small & mid-sized law firms

CaseFox for Enterprise

Enterprise Management Software custom-made for medium and large law departments, law firms, and other legal entities

[Schedule a Call](#)

ENTERPRISE



Contact Us

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Ideal for enterprises and big legal businesses with customizable requirements

Contact Sales

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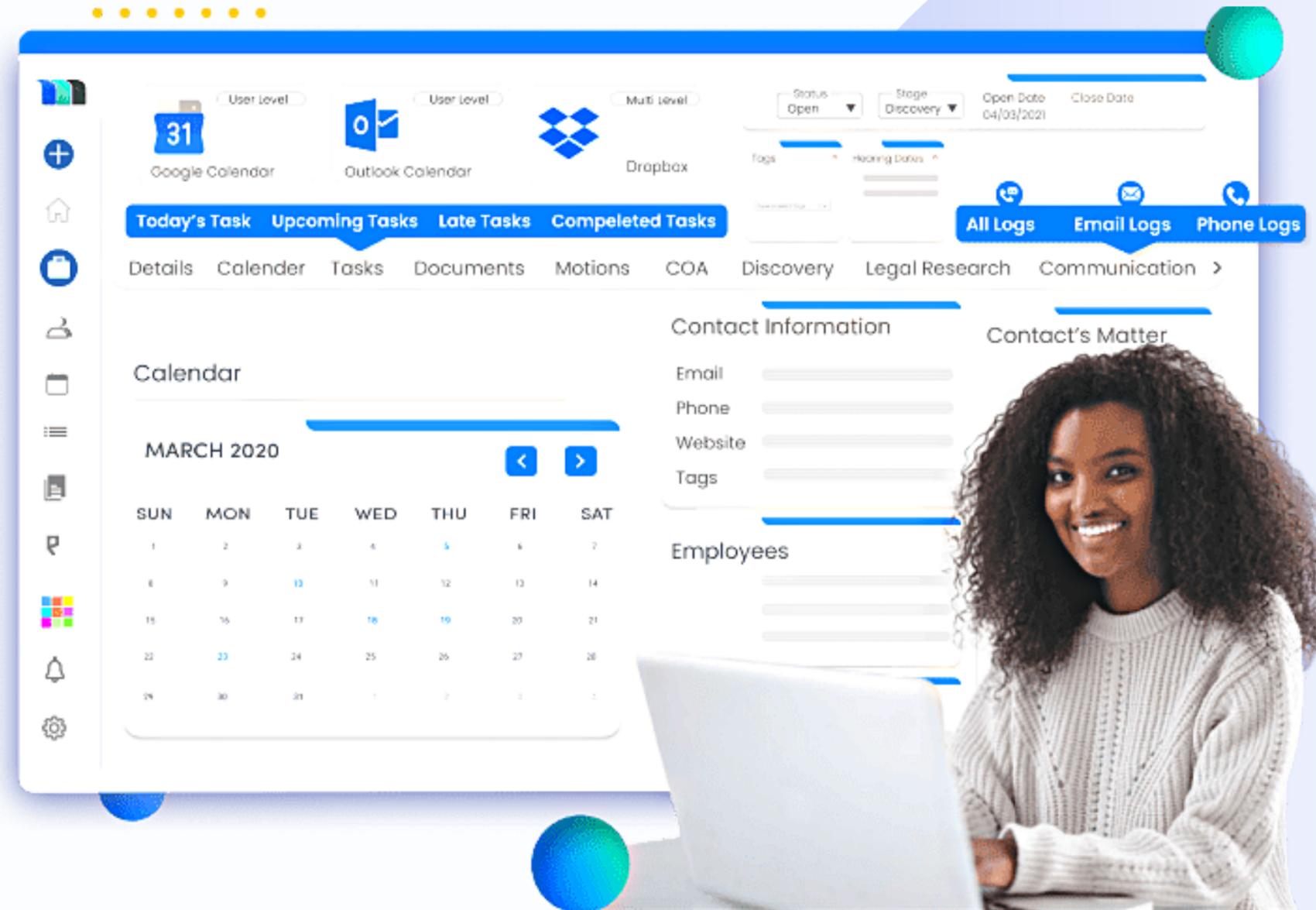
Introducing CaseFox's **new** litigation management software

MatterSuite

Featuring features like **matter management**, **litigation process handling**, **document management**, and **calendaring**, MatterSuite gives you a comprehensive solution to take your practice to the next level.



Visit our website





Thank You