

Informal Bankruptcy Software Survey

I asked attorneys what software they use for:

- Case management (keep track of deadlines and the calendar)
- Timekeeping and billing
- Accounting (managing data related to operations, trust accounts, and payroll)
- Bankruptcy petition preparation (chapter 7 and 13 primarily, and perhaps chapter 11).

The responses are set forth below, separated by * * * * *.

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I also noticed Total Attorneys launched their practice management app, you might take a look at that too: <http://www.totalattorneys.com/>

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As far as bankruptcy software is concerned, we recommend BestCase. From an assistant standpoint, it's very easy and simple to use and very user-friendly for the non-technologically savvy individual. As far as the other types of software, we don't really have any recommendations for as [the attorney] handles that all on his own.

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Please keep me posted on what you find out. I am always looking for ways to improve my practice and how best to advise others. It seems I address these questions several times per year for different clients. Following is what I have used and why I'm not using it anymore and what I currently use:

Case Management: Used to use Time Matters (which is now owned by Lexus Nexus ??) this worked well for about four years until my case load really increased. I always stayed current with upgrades until about the fourth year the upgrade corrupted my entire data base and after spending hours on the phone with their support the best advice I received was delete everything and start over from scratch. I now use Microsoft Outlook for calendar and contacts and my paralegal just makes sure all deadlines etc are scheduled. Seems to be working fine with no great errors that I am aware of. I think Time Matters was trying to be all things to all clients and it was not a successful product.

Time Keeping & Billing: The subject that is the bane of my existence!! Started using Billing Matters which integrated with Time Matters (above). Switched to Time Slips for about three years but was not happy with the billing process or the reporting processes. Seemed to me to cause a lot of wasted time and energy. On January 1st of this year I surrendered to QuickBooks for invoicing clients. So far it seems to be working. I have designed my own invoices and I can select from different styles depending on what I billing for (flat fee v. hourly etc). I also use

QuickBooks for the accounting side of my business and it's nice to have one place to go for everything.

Accounting etc.: I have used QuickBooks since I started. Because of the CPA side of my business I got on the QB bandwagon long ago. Most businesses, if they are going to use a canned accounting program, will utilize QB. QB is not the end all for accounting programs (contrary to their marketing materials) they have just done a remarkable job marketing and are very very popular. The payroll module in QB is their downfall (in my opinion). Once a mistake is made in the payroll it is extremely difficult to correct. This is one area where interest and penalties from mistakes can devastate a business. I actually try and sell my CPA firm to process payroll for clients or recommend that they utilize a national payroll company (ADP, Paycheks etc) instead of trying to use QB. If they insist on using QB for payroll I like to visit them once a month to make sure they are depositing the correct payroll taxes and are reporting correctly on a quarterly basis. Lots here to talk about, lots more than I should put into a brief email.

Bankruptcy software: Started using a software I can't remember the name of, but changed to Best Case around 2004 or 2005 and am happy with it.

I do run all my software in a true network environment (I utilize a server, not a peer-to-peer). In some cases the network version of the some of the software is a little more hefty than the single PC off the shelf software.

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Those inquiring about software generally want the program(s) to do the following:

1. Case management (keep track of deadlines and the calendar)

We just use Outlook, which probably isn't the best tool for this.

2. Timekeeping and billing

We use Timeslips and it sucks royally.

3. Accounting (managing data related to operations, trust accounts, and payroll)

Quickbooks and ADP

4. And of course, bankruptcy petition preparation (chapter 7 and 13 primarily, and perhaps chapter 11).

We use New Hope. It's a bit clunky but it's cheap and since I am not a high volume filer that is important to me. Also, you can talk to the programmer directly (his name is Frederick) so if something really needs to get addressed, he is helpful.

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I've researched this ad nauseam; see my answers below:

1. Case management (keep track of deadlines and the calendar)

A combination of Google Apps (gmail, calendar, contacts, custom domain) and Solve360 www.norada.com. They sync very well so my calendar/contacts/email are always pushed out to my mobile.

2. Timekeeping and billing

Solve360/Quickbooks. There is also a program called Toggl which is great for time tracking, but I find myself doing so much flat fee work I rarely use it.

3. Accounting (managing data related to operations, trust accounts, and payroll)

I've tried a lot of online software (Xero, Freshbooks, Outright, etc) but nothing beats Quickbooks. Necessary for trust accounting.

4. And of course, bankruptcy petition preparation (chapter 7 and 13 primarily, and perhaps chapter 11).

I use BankruptcyPro. Cost is very reasonable, particularly the yearly maintenance fees which are a fraction of BestCase. BestCase is good too but I can't find any particular advantage it has over BankruptcyPro.

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I can only speak as to the bankruptcy prep and we have had the 7-13 software and the Best Case and Best Case is by far superior. Very easy input and filing is a breeze. Would not go back to 7-13.

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We use three programs, but they are all inter-linked. Timslips (for actually sending the bills), Amicus Attorney (for time tracking, filing and calendar as well as conflict management and tracking) and Best Case Bankruptcy.

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I have 2 attorneys and 3 full time secretaries. I use Best Case for my 7/13 practice. I use time slips to keep track of time, outlook's calendar, and QuickBooks.

I use Amicus Attorney for both case management and timekeeping. I use QuickBooks for billing (and general accounting). File and time information is transferred from Amicus to QuickBooks. Amicus now has its own accounting (Amicus Accounting – separate program) and I'm guessing that the linkage between the two Amicus products is probably smoother than what I have with QuickBooks. Plus, it took a while for me to figure out how to get Amicus Attorney and QuickBooks to “talk” but I've had no problems since I figured that out about 6 years ago. I had a comfort level with QuickBooks before I started my own firm, plus Amicus didn't have its own accounting program at that time. And my accountant (like most) is comfortable with

QuickBooks – I don't know how Amicus Accounting does on the basic accounting or if its data can be exported into some general format that most accountants would be able to use for tax preparation.

I have generally positive feelings about Amicus Attorney – it puts everything into a single package so that files, contacts, appointments, to-dos, calendar, communications and time entries are all dealt with in a pretty cohesive manner. The linkage to e-mails (so that you can automatically save e-mails from Outlook into Amicus Attorney and have them associated with a particular client/matter [a file]) is supposed to be better in the 2010 version which I've yet to install. I haven't found a compelling reason to switch to anything else (not that I've looked very hard).

I also haven't yet tried to transfer or link my Amicus Attorney calendar to my BlackBerry which is pretty important when you're in court and trying to schedule a trial or hearing. So far hasn't hurt me but I'm not sure how well it does it.

Amicus Attorney has a number of other features that I'm sure I under-utilize.

I'd be happy to discuss Amicus Attorney with anyone (and would be happy to talk with anybody who's already using it so we could share "war stories" so let me know if you know of anyone else who's using it). I think it's very reasonably priced compared with what I heard about other case/file/time management programs.

I use EZ-Filing for bankruptcy preparation. As with anything, it's got its own way of doing things that you have to get used to but I've found it to be easy to use. And I understand it's cheaper (initially and on an annual basis) than Best Case.