



Insight Legal

PRACTICE MANAGEMENT

Our industry-leading practice management solutions empower your firm to achieve more growth with less effort.

One-click client care

- Store and manage cases securely in the cloud and instantly access them from anywhere
- Set up prompts and reminders to complete tasks or escalate cases as necessary
- Communicate with clients and contacts with customizable pre-built templates
- Automate time recording with our accurate built-in recording functionality
- Complete essential compliance checks in accordance with SRA Accounts Rules requirements

- User access control
- Automated compliance checks
- Contact management
- Case management
- Meet AML requirements
- MTD compliant

Be more productive and profitable

- Understand firm-wide, departmental and fee-earner performance
- Consolidate top-level financial reports of your practice
- Track all finances in one system from income to budgets, VAT to cash flow, time recording to disbursements
- Get paid quickly with integrated payment links and billing for clients
- Simplify month-end and year-end routines with advanced real-time financial accuracy

- Performance analysis
- Integrated payments
- Auto bank reconciliation
- Efficient invoicing



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