

SL  
TA

# Overview of law firm management software

Switzerland

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# METHODOLOGY

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To create this brochure, we shared a questionnaire with businesses who offer law firm management software in Switzerland.

We compiled the replies in this brochure to present a comparison.

The points of comparison relate to various aspects that we believe are relevant to those who are looking to acquire a law firm management software, such as available features, compatibility with operating systems or other software and pricing model.

Should you have any questions related to a specific software, please feel free to directly contact the creator of that software.

Disclaimer:

We did not ourselves verify the accuracy of the data, nor did we ourselves test the software presented in this brochure. We do not endorse or recommend any particular software.

## **ABOUT THE SWISS LEGALTECH ASSOCIATION**

The SLTA is a neutral, non-profit organization, created in 2015 to help modernize the Legal industry and bring its actors together.

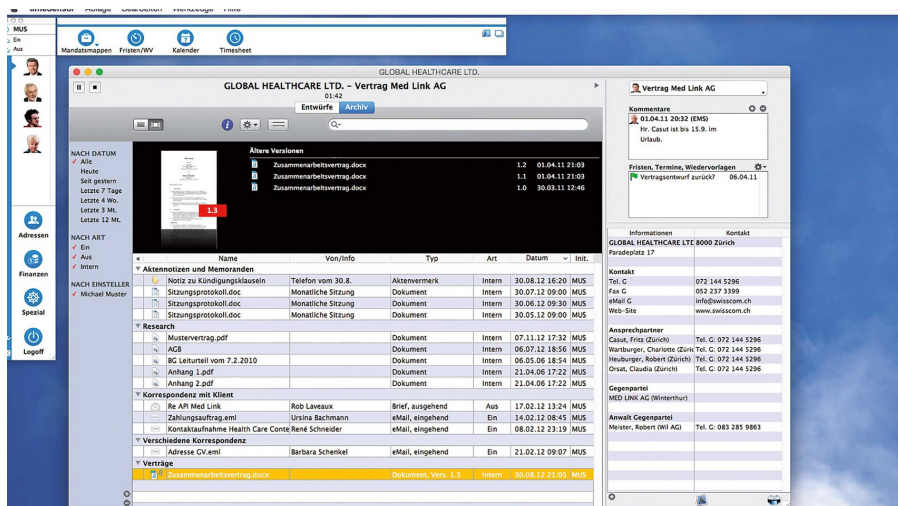
If you wish to support our work or learn more about LegalTech in Switzerland, please visit our website : **[Swisslegaltech.ch/membership/](https://swisslegaltech.ch/membership/)**

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# timeSensor LEGAL

De, Fr, It, En



Name of the  
software

timeSensor  
Legal

Name of the  
company

timeSensor  
AG

Number of  
employees

9

Turnover of  
the company

2.1 million

Swiss  
Headquarter

St. Gallen

Number of  
customers

280 law firms

## Costs/Prices

### Pricing model

**License model:** Purchase license + mandatory annual maintenance

**Subscription model:** Annual fee

### Basis of assessment

**User model:** Number of users relevant

### Offer a fixed migration price

By effort/data volume

Offer a fixed price/cost roof  
for the implementation of  
your software

NO

If the training by your  
company or the service  
partners is included in the  
price

NO

## Service

### Size of the support team in Switzerland

4

Includes interface maintenance and testing of the software

### Names of Service Partners

DQ Solutions, Wallisellen Karbonic, The Locle

Includes version handling and testing of the software

Offer data migrations - YES

Trainings portal: <https://timesensor.ch/akademie/>

### Migrated data to your software

Ancoma, SmartLex, WinJur, ra-micro, AMICIUS Attorney, Advolux, Advoware, DATEV, legal:office, Filemaker

## Law Firm Software Modules

### The software is available in various editions

Easy Edition, Smart Edition, Business Edition, First Edition or Department Edition.

### Description of modules

<https://www.timesensor.ch/kanzleisoftware>

### Law firm sizes

Solo (Easy Edition)  
5-10 Lawyers (Smart Edition/Business Edition)  
11-50 Lawyers (Business Edition)  
51-100 Lawyers (First Edition)  
> 100 Lawyers (First Edition)

### Offers the following services:

Mandate management  
Conflict check  
Deadlines  
Power recording automated (stopwatch)  
Performance recording manually  
Invoicing automated  
Invoicing manual/individual  
Document creation / templates  
Accounting  
Reporting  
File and folder structure  
Compliance and audit security  
Full-text search in the file and folder structure  
Secure data transfer with clients  
Mobile working of individual modules  
Mobile working of all modules with Terminal Server  
Contact Management (CRM)  
GDPR compliance

### Reference law firms

<https://timesensor.ch/referenzen-ch/>

## Technical

### Partial Outlook integration

#### Server systems

Windows Server 2019  
Windows Server 2016  
macOS

#### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10

#### macOS

macOS Catalina  
macOS Mojave  
macOS High Sierra  
macOS Sierra

### System architecture

Application Server  
Database Server

### Data stored

On-Premise  
Cloud

### Terminal server-based solutions

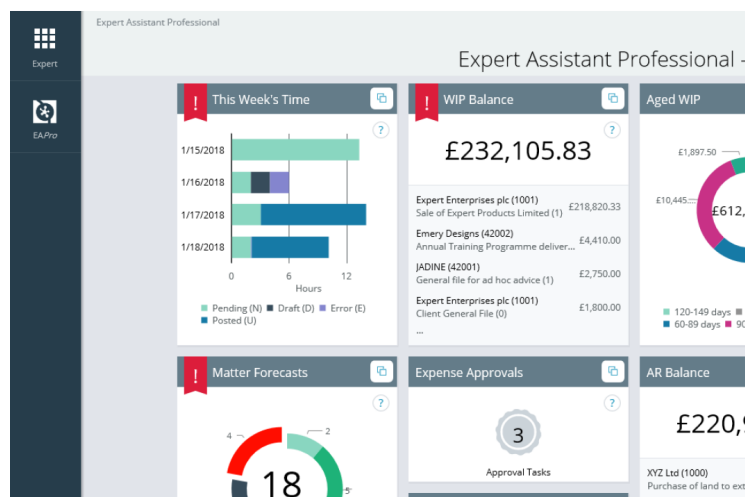
Windows Remote Desktop Services  
Citrix  
VMWare

DMS automatically detects the correct drop folder for incoming emails

# Aderant Expert

En, Dutch

Sample screen: Your Aderant dashboard – Operational information



Name of the software

**Aderant Expert**

Name of the company

**Aderant Legal (UK) Limited**

Number of employees

**550+**

Turnover of the company

Please refer to [www.ropertech.com](http://www.ropertech.com) as Aderant is a subsidiary of Roper Technologies

Swiss Headquarter

None.  
Local Europe Offices:  
Level 3  
8 Lloyds Avenue  
London EC3N 3EL  
Gustav Mahlerplein 2  
1082 MA Amsterdam  
The Netherlands

Number of customers

**530+**

## Costs/Prices

### Pricing model

**License model:** One-time perpetual license + annual maintenance

**Subscription model:** Annual fee – On Expert Sierra

### Basis of assessment

**Professional model:** Number of fee earners

### Offer a fixed migration price

Yes based on statement of work

**Offers a fixed price/fee cap for the implementation of your software**

**NO**

**If the training by your company or the service partners is included in the price**

**NO**

## Service

### Size of the support team in Switzerland

Centralized regional support centers.

### Names of Service Partners

Can be provided under specific client requests

### Offer data migrations - YES

#### Migrated data to your software

Ancoma, Elite, Axxia, Timeslice and others

### Includes interface maintenance and testing of the software

For software version release. Firm or Services resources on individual environments

### For documentations and explanation

For more information please visit [www.aderant.com](http://www.aderant.com) and navigate to the Resources and/or Services tab.

## Law Firm Software Modules

### The software is available in various editions

Matter Management, Time, Billing, Expense Management, Credit Control, Budgetting, Legal Project Management, Time Reconsutruction, Business Intelligence, File Opening, Conflicts and global financial management. Agnositic solutions include: Time Recording, Client Collaboration, E-bill Management and Knowledge Management.

### Description of modules

For Aderant solutions and descriptions please visit [www.aderant.com](http://www.aderant.com) and navigate to the Solutions tab.

### Law firm sizes

11-50 lawyers

51-100 lawyers

> 100 lawyers

### Reference law firms

only on request

## Technical

### Partial Outlook integration

#### Server systems

Windows Server 2019

Windows Server 2016

#### Office versions

Office 365

Office 2019

Office 2016

Office 2013

#### Windows

Windows 10

Windows 8

#### Terminal server-based solutions

Windows Remote Desktop

Citrix

VMWare

### Offers the following services:

Mandate management

Conflict check

Time limits

Automated activity recording (stopwatch)

Manual activity recording

Automated invoicing

Manual/individual invoicing

Document creation / Templates

Accounting

Reporting/Reporting

File and folder structure

Compliance and audit security

Full text search in the file and folder structure

Secure data transfer with clients

Mobile working of individual modules

GDPR conformity

### Security of dossier management implementation:

Data: – Microsoft SQL Server security functions and row-level security

### System architecture

Application Server

Database Server

### Data stored

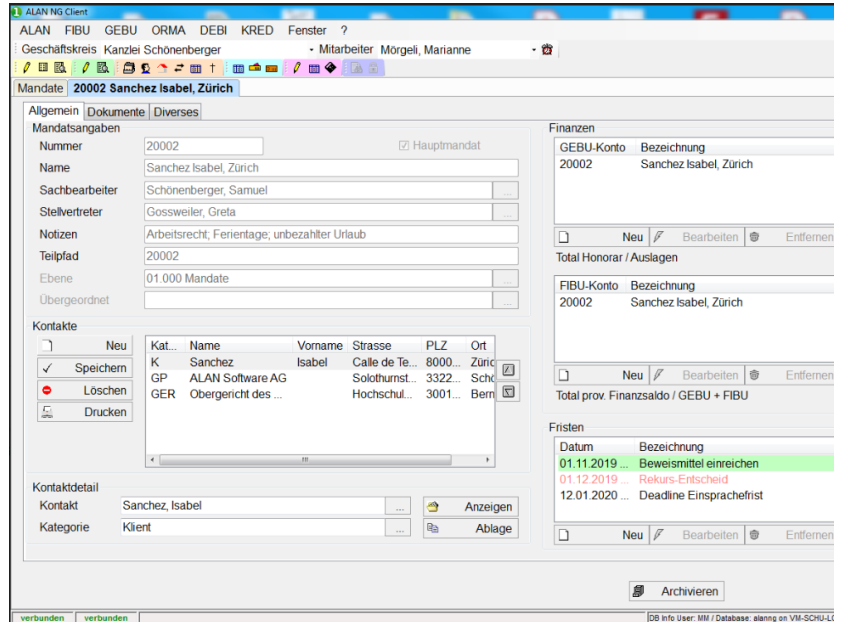
On-Premise

Cloud - Expert Sierra

### DMS automatically detects the correct drop folder for incoming emails

# Alan

De, Fr, En



Name of the software

ALAN Software AG

Name of the company

No information, belongs to the FIVE Group

Number of full-time positions

Undisclosed

Turnover of the company

Undisclosed

Swiss Headquarter

Solothurnstrase 28, 3322 Schönbühl

Number of customers

No information

## Costs/Prices

### Pricing model

**License model:** Purchase license + mandatory annual maintenance

**Subscription model:** Annual fee

### Basis of assessment

**User model:** Number of users relevant

### Offer a fixed migration price

YES

Offer a fixed price/cost roof for the implementation of your software

YES

If the training by your company or the service partners is included in the price

No, training courses are offered individually to customers

## Service

### Size of the support team in Switzerland

6

### Includes interface maintenance and testing of the software

### Names of Service Partners

Oracle, Microsoft

### Offer data migrations - YES

#### Migrated data to your software

Smartlex, Esus, Forensys, Excel, XML, JSON, CSV, TXT.  
In principle, we can take over data from any existing software

YES

### For documentations and explanation

Online documentation directly accessible from the Agora web user interfaces. For the other modules, PDF documentation.

## Law Firm Software Modules

### The software is available in various editions and integrates the following optional modules

#### Description of modules

System and user Management  
WinLaw - Persons / Mandates / Timesheets / Lawyer Billing / Task Management / Deadlines / Conflicts of Interest  
DMS - complete document management based on sharepoint (online or on-premise) and integrated to Outlook  
WinGen - General Accounting  
WinDeb - Accounts Receivable  
WinDef - Accounts Payable  
Cost Center Management (Cost Accounting)  
Electronic payments according to ISO 20022  
Budgets  
Consolidations  
WinGes - Personnel management and payroll  
Absence and vacation management  
Correspondent management  
Document stock management

#### Law firm sizes

5-10 lawyers  
11-50 lawyers  
51-100 lawyers  
> 100 lawyers

#### Reference law firms

KELLERHALS CARRARD GENEVE  
OBERSON ABELS SA  
LENZ & STAEHELIN  
PETER & KIM  
BERNASCONI, MARTINELLI, ALIPPI & PARTNERS  
CROCHET & CRISTIANO  
DGE AVOCATS  
PYTHON

GAGGINI & PARTNERS  
JUNOD, MUHLSTEIN, LEVY & PUDER  
MING, HALPERIN, BURGER & INAUDI  
MONFRINI, CRETTOLETTI & ASSOCIES  
PETER & PARTNERS INTERNATIONAL LTD  
OHS AVOCATS (ODIER HALPERIN STEINMANN)

### Offer the following services:

Mandate management  
Conflict check  
Time limits  
Automated activity recording (stopwatch)  
Manual activity recording  
Automated invoicing  
Manual/individual invoicing  
Document creation / Templates  
Accounting  
Reporting/Reporting  
File and folder structure  
Compliance and audit security  
Full text search in the file and folder structure  
Secure data transfer with clients  
Mobile working of individual modules  
Mobile working of individual modules  
Contact Management (CRM)  
GDPR conformity

### Security of folder management implementation:

Data: The documents are stored and secured by SharePoint. Only the SharePoint administrator has full access.

## Technical

### Complete Outlook integration

#### Server systems

Windows Server 2019  
Windows Server 2016

#### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10  
Windows 8

#### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix  
VMWare

#### System architecture

Application Server  
Database Server

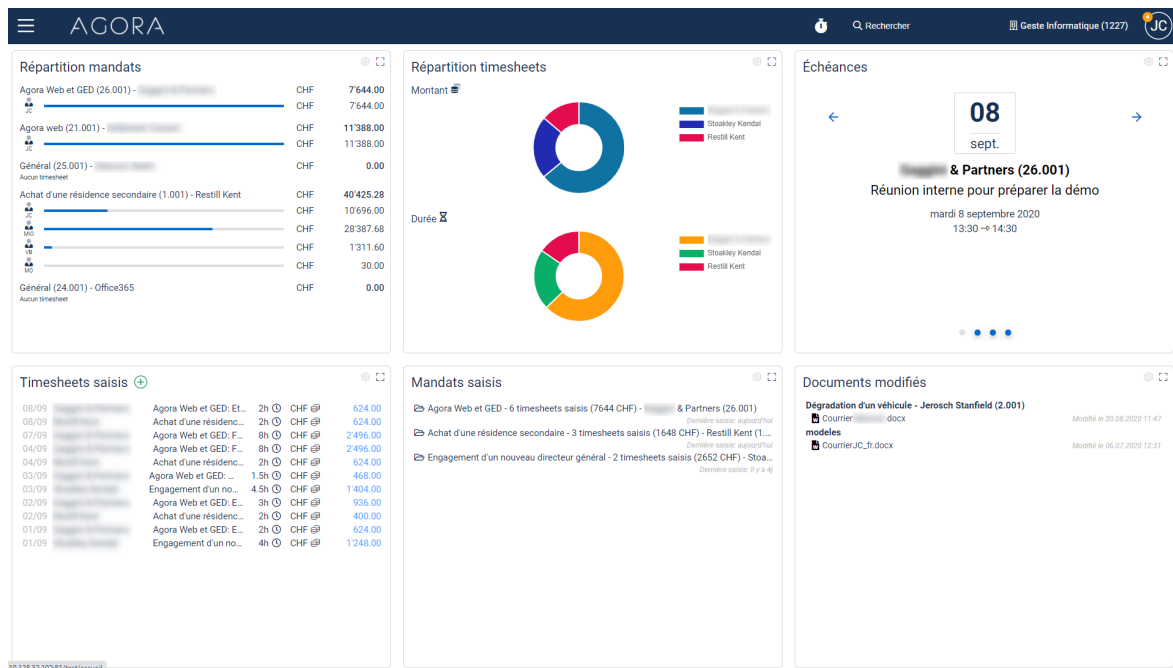
#### Data stored

On-Premise  
Private or Public Cloud

### DMS automatically suggests the correct folder for incoming or sending emails

DMS is also able to automatically classify an email in the correct folder according to the percentage of match





Name of the software

Agora

Name of the company

Geste Informatique SA

Number of full-time positions

9

Turnover of the company

Undisclosed

Swiss Headquarter

Av. Cardinal Mermillod 36  
1227 Carouge

Number of customers

120+

## Costs/Prices

### Pricing model

**License model:** purchase license + mandatory annual maintenance

**Subscription model:** Annual fee

### Basis for assessment

**User model:** Number of users relevant

### Offer a fixed migration price

The cost of data migration depends on the scope of the data to be transferred. This cost appears clearly in our offers and is calculated after a preliminary study of the customer's data.

### Offer a fixed price/cost roof for the implementation of your software

The cost of implementing Agora depends on the size of the project. It appears clearly in our offers and is calculated according to the modules to be installed and configured.

### If the training by your company or the service partners is included in the price

The training appears clearly in our offers and is calculated according to the number of people to be trained per module.

## Service

### Size of the support team in Switzerland

5

### Names of Service Partners

FIVE Informatik AG, development and maintenance, sales, introduction, training, and support everything by FIVE Informatik AG

### Offer data migrations - YES

Migrated data to your software

Various, no detail

### Includes interface maintenance and testing of the software

YES

### For documentations and explanation

Yes, in-application documents and PDFs

## Law Firm Software Modules

### The software is available in various editions

### Description of modules

Financial Accounting (FIBU) Performance Recording (GEBU)  
Mandate Management (ORMA) Customer Management (DEBI)  
Vendor Management (KRED) Archiving (ARCH)

### Law firm sizes

Solo  
5-10 Lawyers  
11-50 Lawyers  
51-100 Lawyers  
> 100 Lawyers

### Offer the following services:

Mandate management  
conflict check  
deadlines  
performance recording automated (stopwatch) - In planning  
performance recording manual  
invoicing automated  
invoicing manual/individual  
document creation / templates  
accounting  
reporting/reporting  
file and folder structure  
compliance and audit security  
full-text search in the file and folder structure  
Secure data transfer with clients - In planning  
Mobile work of individual modules  
Contact management (CRM)

### Reference law firms:

only on request

### Security of dossier management implementation:

Data: User rights in application, NTFS user rights

## Technical

### Partial Outlook integration

### Server systems

Windows Server 2019  
Windows Server 2016

### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

### Windows

Windows 10  
Windows 8  
Windows 7

### Terminal server-based solutions

Windows Remote Desktop  
Services  
Citrix  
VMWare

### System architecture

Application Server  
Database Server

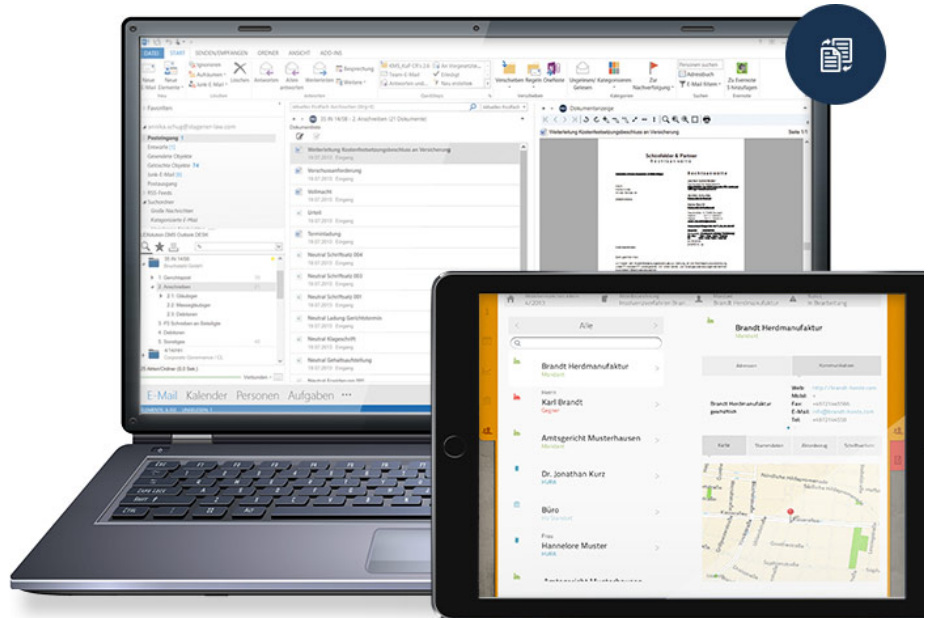
### Data stored

On-Premise  
Private Cloud or Public  
Cloud

### DMS automatically detects the correct drop folder for incoming emails

# Lexolution

De, Fr, It, En



Name of the software

Name of the company

Number of full-time positions

Turnover of the company

Swiss Headquarter

Number of customers

LEXolution Suite

STP Information Technology Ltd.

About 250

Ca. 30 million (estimated for 2019)

Zurich

About 700

## Costs/Prices

### Pricing model

**License model:** Purchase license + annual maintenance

**Subscription Model:** Annual Fee

**Offer a fixed price/cost roof for the implementation of your software**

**YES** (after checking the actual situation)

### Basis of assessment

**User model:** Number of users relevant

**If the training by your company or the service partners is included in the price**

**Offer a fixed migration price**

**YES** (after checking the actual solution)

**YES**

## Service

**Size of the support team in Switzerland**  
12 (+35 in D)

### Names of Service Partners

Nexpert AG, Ategra, ITST, see Partner List etc.

**Offer data migrations - YES**

### Migrated data to your software

WinJur, Ancoma, Plato, Vertec, Honoris, Smart (in D: Datev, RA-Micro, AnNoText, ReNoStar, etc)

**Includes interface maintenance and testing of the software**

**YES**

### For documentations and explanation

LEXolution Suite with KMS/DMS/Time presentation video: <https://www.youtube.com/watch?v=v27pecNzCQs>

## Law Firm Software Modules

**The software is available in various editions**

### Description of modules

#### LEXolution.KMS

Law firm ERP-System with the mapping of complex billing models, from performance recording to automated client-specific billing, also for eBilling mandates. The basis is the contact and mandate management, which is provided with detailed conflict checks, tags to Money Laundering Act Review, SNB reporting obligation, GDPR/GDPR, Chinese Walls, etc. also highest compliance requirements.

#### LEXolution.DMS

The document management system, which covers all the needs of a law firm, including integration with Outlook as well as directly in office products such as Word, with automated versioning, integrated document comparison tool, etc.

#### LEXolution.Time

offers not only the acquisition in the KMS client but also the possibility of mobile capture, anytime and anywhere, on- and offline on the notebook, iPhone, iPad.

#### LEXolution.BI

The Business Intelligence Tool, which is developed via a data warehouse and ETL processes, on the one hand, the commercially responsible persons all relevant data is provided directly in Excel PowerPivot and, on the other hand, graphical dashboards with individual KPIs by user authorization level. (STP BI Competence Center in Liechtenstein)

#### LEXolution.contact

This Legal contact specifically for use in Law firms gives the lawyers the Ability to tag and share your contacts directly in Outlook for marketing and/or business development activities. Sensitive data can be protected accordingly, contact activities can be viewed, etc. - all directly in Outlook.

#### LEXolution.FLOW

The cloud-based collaboration platform incl. presentation of both internal and external Business

### Reference law firms

only on request

### Offer the following services:

Mandate Management  
Conflict Check (gwg)  
Deadlines  
Power recording automated (stopwatch)  
Power recording manually  
Invoicing automated  
Invoicing manually/individually  
Document Creation / Templates  
Accounting  
Interface to Sage/Abacus available  
Reporting/Reporting  
Files and folder structure  
Compliance and Audit Security  
Full-text search in the file and folder structure  
Secure data transfer with clients  
Mobile working of individual modules  
Mobile working of all modules  
("only" Time+DMS+FLOW)  
Contact Management (CRM)  
GDPR- Conformity  
Compliance Tool

### Security of dossier management implementation:

Incoming e-mails are detected on the one hand if they are the response to sent e-mails, on the other hand, on the basis of the sender address and/or a contained file number and then corresponding filing locations are suggested (from V 7.3)

## Technical

### Partial Outlook integration

#### Server systems

Windows Server 2019  
Windows Server 2016

#### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10  
Windows 8  
Windows 7 not recommended

#### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix  
VMWare

### Law firm sizes

Solo (WinJur, Ancoma)  
5-10 Lawyers (LEXolution, WinJur, Ancoma)  
11-50 Lawyers (LEXolution, WinJur)  
51-100 Lawyers (LEXolution)  
> 100 Lawyers (LEXolution)

#### System architecture

Application Server  
Database Server

#### Data stored

On-Premise  
Cloud

**DMS automatically detects the correct drop folder for incoming emails**

Neo  
De

Neo - (Angebotsteller: markus meier)

Daten Extras Hilfe      Aktuell      Kontakte      Dossier

Neu...      Telefon      E-Mail...      Aufgabe      Dokument      Notiz      Leistung      Importieren...      Eigenschaften      Beschriftungen      Mehr...      Suche

Dossier: MEIER: GRÜNDUNG EINER GMBH      Alle Leistungsarten

**Numer:** 1021      **Inhaber:** Markus Meier      **Klient:** Meier Daniel  
**Aktenzeichen:** M 2015.01      **Kategorie:** Gesellschaftsrecht      G: 061 638 55 89  
**MWST-pflichtig:** Ja      **Kleinspenp.:** Nein      M: 079 989 78 77  
**Währung:** CHF      **Budget:** 6'000.00 (67%)      E-Mail: pmMeier@bluewin.ch

**Bemerkungen:** Herr Meier ist im Juli in den Ferien und möchte während dieser Zeit keine Post zugestellt erhalten.

**Offen:** Honorar  
Spesen  
Zahlung  
Summ  
Kosten

AKTIVITÄTEN	Datum	Betreff	Erbrin...	Zeita...	Ansatz	Honorar	Spesen	Status	Mandate
Aufgaben	30.11.2019	Abklärungen	MM	00:30	320.00	160.00			Abt Friedrich
Termine	30.11.2019	Telefon mit Herrn Brunschweiler	MM	01:00	320.00	320.00			Gundeldinger Zeitung:
Notizen	30.11.2019	Brief an Daniel Meier	MM	01:00	320.00	320.00	10.00		Berätungs- und Gesundheits
Dokumente/E-Mails	30.11.2019	Schreiben an Frau Meier	MM	01:00	320.00	320.00	5.00		Bei: Scheidung
Leistungen	30.11.2019	Ausarbeitung der Statuten	MM	03:00	320.00	960.00			Bruggler Mirjam
Rechnungen	22.11.2019	Telefon von Herrn Meier	MM	00:10	320.00	53.33			Meier/Bruggler/Weiss: t
Zahlungen	15.11.2019	Ausarbeitung der Statuten	MM	02:00	320.00	640.00			Davis Jean-Pierre
Alle Aktivitäten	15.11.2019	Brief an Herrn Meier	MM	00:15	320.00	80.00	11.00		Davis/Eberle: Nachbars
DIVERSE	15.11.2019	Telefon mit Herrn Brunschweiler	MM	00:10	320.00	53.33	0.50		Davis: Testament
Kontakte	14.11.2019	Brief an das Handelsregisteramt	MM	00:45	320.00	240.00	11.00		Eberle Catrin
Steuereklärungen	12.11.2019	Besprechung mit Herrn Meier	MM	00:10	320.00	53.33	0.50		Eberle: Steuern
Offene Positionen	08.11.2019	Besprechung mit Herrn Meier	MM	01:00	320.00	320.00			Eberle: Testament
	09.08.2019	Aktenstudium und Rechtsabklärungen	MM	01:30	320.00	480.00			Egger Robert
									Egger: Nachfolgeberat
									Graf Muriel
									Graf: Unfall mit Fahrrad
									Gundeldinger Zeitung:
									Gundeldinger Zeitung:
									Gundeldinger Zeitung:
									Hegi Andria
									Hegi: Unfall mit Auto
									Meier Daniel
									Meier/Bruggler/Weiss: t
									Meier: Gründung einer
									Meier Daniel Bazentheid

Name of the software

Neo

Name of the company

Iustec Ltd.

Number of full-time positions

Undisclosed

Turnover of the company

Undisclosed

Swiss Headquarter

Riehen,  
Switzerland

Number of customers

&gt;500

## Costs/Prices

### Pricing model

Neo can be installed on any number of computers. The number of paid licenses depends on the number of users who want to work with Neo simultaneously.

### Basis of assessment

Annual fee, incl. support and all updates

### Offer a fixed migration price

**User model:** Number of users relevant

### Offer a fixed price/cost roof for the implementation of your software

For import from WinJur free; other import interfaces are not available and a partial import of other solutions would be calculated according to effort

### If the training by your company or the service partners is included in the price

Installation is simple and is performed by the users themselves; if necessary, help is offered that costs nothing

## Service

### Size of the support team in Switzerland

N/A

### Names of Service Partners

Katta Ltd.

### Offer data migrations - YES

### Migrated data to your software

WinJur

### Includes interface maintenance and testing of the software

YES

### For documentations and explanation

[www.iustec.ch/produkte/neo-leistungserfassung-software/leistungserfassung](http://www.iustec.ch/produkte/neo-leistungserfassung-software/leistungserfassung)

## Law Firm Software Modules

Mandate management, Conflict check, Deadlines, Automated service recording (stopwatch) Manual service entry, Manual/individual invoicing, Document creation/templates, Accounting, Reporting, Record- and Folder structure, Full text search in the file and folder structure (but not in the documents themselves), Contact management (CRM), GDPR conformity

### Reference law firms

Bravest AG (Roger Müller Rechtsanwälte),  
Winiger | Scruzzi Advokatur & Notariat  
Advokatur & Notariat zum Thurgauerhof  
Advokatur am Fischmarkt  
Advokatur und Notariat Béguin Miescher Brutschin  
Martin Gass  
Advokaturbüro Walther Leuch Howald  
ANDERSEN & PARTNERS GmbH  
Anwältinnenbüro  
Bieri & Breiter Anwälte  
Bigler Kaufmann Rechtsanwälte  
Borer Bertossa Advokaturbüro

### Offer the following services:

Contact management with any contact group, form letter and serial e-mail function  
Mandate management  
Performance management  
Task and time-limit management  
Document management (incl. e-mails)  
Customer management  
Evaluation module for creating own evaluations (> 100 variations)  
Simple accounting (inputs/expenses)  
Know-how management  
Synchronization with Outlook (contacts, tasks, and appointments)  
Notary diary  
Administration tax returns  
Document signing with open eGov LocalSigner

### Security of dossier management implementation:

On-Premise  
Cloud also possible with enough fast internet connection (at least 100 Mbps up and download)

### Law firm sizes

1-25 user

## Technical

### Partial Outlook integration

#### Server systems

Windows Server 2019  
Windows Server 2016

#### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10  
Windows 8  
Windows 7

#### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix  
VMWare

#### System architecture

MS-Access or MySQL

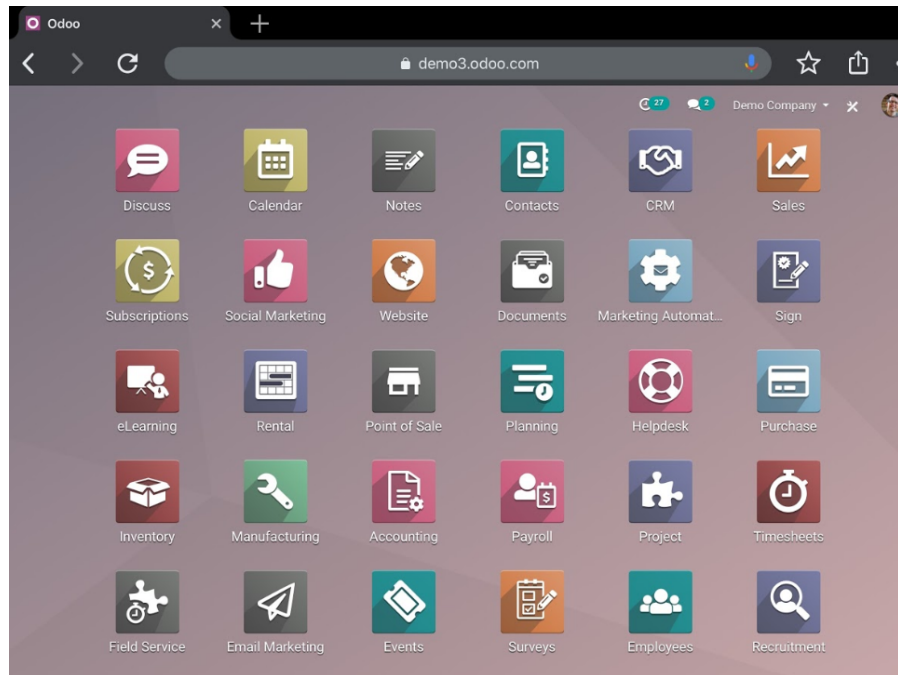
#### Data stored

Emails must be recorded manually and assigned to a mandate

### DMS automatically detects the correct drop folder for incoming emails - NO

# Odoo

De, En, Fr, It, Es



Name of the software

Odoo

Name of the company

brain-tec AG (Gold Partner of Odoo SA in Switzerland, Germany and Spain)

Number of full-time positions

59

Turnover of the company

>10 million CHF (brain-tec AG, Switzerland)

Swiss Headquarter

brain-tec AG, Safflichstrasse 4, CH-3900 Brig (headquarters) incl. facilities in Basel and Zurich

Number of customers

> 110,000 companies worldwide - as an on-Premise solution; and 5.0 million users on cloud platform

## Costs/Prices

### Pricing model

**License model:** Purchase license + mandatory annual maintenance

**Subscription Model:** Annual Fee

**Other model:** Annual maintenance costs for the use of the Odoo modules (apps) as well as one-time costs for installation, customizing, project coordination, etc.

### Basis of assessment

**User model:** Number of users relevant

**Professional model:** Number of lawyers relevant

### Offer a fixed migration price

**Described:** brain-tec AG does not offer migration fixed price. brain-tec AG can make a budget offer.

### Offer a fixed price/cost roof for the implementation of your software

brain-tec AG does not offer a fixed price/cost roof. brain-tec AG can make a budget offer.

### If the training by your company or the service partners is included in the price

brain-tec AG offers appropriate training courses. In addition, there is also a free eLearning platform. See also: [https://www.odoo.com/de\\_DE/slides](https://www.odoo.com/de_DE/slides)

## Service

**Size of the support team in Switzerland**  
13

### Names of Service Partners

brain-tec AG, Odoo SA or one of the more than 2400 Odoo partners worldwide

### Offer data migrations - YES

### Migrated data to your software

brain-tec AG has never migrated data from a law firm solution.

## Law Firm Software Modules

The software is available in various editions

### Description of modules

Below you will find a few links to the various Odoo modules (apps):

Project management:

<https://www.odoo.com/page/project-management>

Time recording:

<https://www.odoo.com/page/timesheet-mobile-app?>

Document management:

<http://www.odoo.com/page/documents>

Billing:

<https://www.odoo.com/page/billing>

Accounting:

<https://www.odoo.com/page/accounting>

### Reference law firms

brain-tec AG currently has no reference law firms as customers. However, payer smacked service companies using Odoo

## Technical

### Full Outlook integration

### Server systems

Linux

### Office versions

Office 365

Office 2019

### Windows

Windows 10

### MacOS

macOS

Mojave

### Terminal server-based solutions

Windows Remote Desktop Services

Citrix

VMWare

**Includes interface maintenance and testing of the software**

YES

### For documentations and explanation

[https://www.odoo.com/de\\_DE/slides](https://www.odoo.com/de_DE/slides) and

[https://www.odoo.com/de\\_DE/page/tour](https://www.odoo.com/de_DE/page/tour)

### Offer the following services:

Mandate Management

Conflict Check

Deadlines

Power recording automated (stopwatch)

Power recording manually

Invoicing automated

Invoicing manually/individually

Document Creation / Templates

Accounting Interface to Sage/Abacus available

Reporting/Reporting

Files and folder structure

Compliance and Audit Security

Full-text search in the file and folder structure

Secure data transfer with clients

Mobile working of individual modules

Mobile working of all modules

Contact Management (CRM)

GDPR compliance

[https://www.odoo.com/de\\_DE/gdpr](https://www.odoo.com/de_DE/gdpr)

### Security of dossier management implementation:

on roles and rights

### Law firm sizes

Solo

5-10 Lawyers

11-50 Lawyers

51-100 Lawyers

> 100 lawyers x

### System architecture

Application Server

Database Server

### Data stored

On-Premise

Cloud

**DMS automatically detects the correct drop folder for incoming emails**



# Vertec

De, En

The screenshot shows a web-based task management interface. On the left is a navigation menu with categories like 'Christoph Keller', 'Offene Leistungen', 'Wochenerfassung', 'Übersicht Leistungen', 'Offene Spesen', 'Aktivitäten pendent', 'Aktivitäten', 'eigene pendente Fristen', 'Pendenzen Team' (highlighted), 'Delegierte Pendenzen', 'Abwesenheiten', 'Vorgaben', 'Eigene Mandate', 'Team', 'Mandate', 'Betreute Adressen', 'eigene Verträge', 'Zielvereinbarungen', 'Daten Recherchen', 'Auswertungen CRM', 'Rechnungswesen', 'Öffentliche Ordner', 'Vertragsverwaltung', 'Qualitätssicherung', 'Stammdaten', and 'Einstellungen'. The main area displays a table of tasks for the 'Pendenzen Team'.

Typ	Termin	Zuständig	Titel	Kontaktart	
Telefon	15.10.2016	Judith Feller	Bitte erledigen		
Rechtsschritt	16.10.2016	Christoph Keller	Einladung zum Event 2011		V
Brief	17.10.2016	Christoph Keller	Termin für Mittagessen mit Hr. Huber		C
Frist	18.10.2016	Christoph Keller	Duplik		C
Verkauf	19.10.2016	Lars Sorenson	Offerte (Word)	Schriftlich	II
Kundenanfrage	20.10.2016	Judith Feller	Nachfrage wegen Projektstand	Telefon	V
Kundenanfrage	20.10.2016	Christoph Keller	Rückruf wegen Terminplan	Telefon	C
Frist	21.10.2016	Christoph Keller	Eingabe Antrag		E
Frist	23.10.2016	Christoph Keller	Mandat in Rechnung stellen		J
Kundenanfrage	24.10.2016	Lars Sorenson	Rückrufbitte	Schriftlich	F
Telefon	25.10.2016	Judith Feller	Wünscht Rückruf betr. Offerte		
Frist	26.10.2016	Christoph Keller	Duplik		C
Kundenanfrage	01.11.2016	Lars Sorenson	Referenzliste	E-Mail	A
Verkauf	04.11.2016	Christoph Keller	Herr Huber wünscht eine Offere	Telefon	C
Brief	14.11.2016	Judith Feller	Abschluss	Schriftlich	C
Rechtsschritt	15.11.2016	Christoph Keller	Bitte Leads bearbeiten: N/A, Demo, Offerte	Schriftlich	
Frist	18.11.2016	Christoph Keller	Replik		F
Rechtsschritt	22.01.2017	Judith Feller	Nachfasen betr. Brief Einladung	Schriftlich	

Name of the software

Vertec

Name of the company

Vertec AG

Number of full-time positions

35

Turnover of the company

We do not publish the turnover

Swiss Headquarter

Weststrasse  
75 in 8003  
Zurich

Number of customers

More than 1000

## Costs/Prices

### Pricing model

**License model:** Purchase license + mandatory annual maintenance

**Subscription Model:** Annual Fee

**SaaS model:** Cloud subscription is invoiced quarterly

### Basis of assessment

**User model:** Number of users relevant

### Offer a fixed migration price

NO

### Offer a fixed price/cost roof for the implementation of your software

After the preliminary project, we will be able to make a binding offer for the Vertec introductory project based on the definitive specification. At the same time, we are also prepared to offer individual thematic blocks with a cost roof or at a flat price.

### If the training by your company or the service partners is included in the price

NO

## Service

**Size of the support team in Switzerland**  
5

### Names of Service Partners

Distributors: Lean Business AG, Intus Data AG, Spektra  
Netcom AG, Arc Logicals SA, appGenerisc  
Further information:  
<https://www.vertec.com/ch/unternehmen/partner/>

### Offer data migrations -YES

#### Migrated data to your software

WinJur, alan, Ancoma, All Honoris, IUSTEC, Mandate  
M2, Solution

## Law Firm Software Modules

Basic Module Performance & CRM, Budget & Subproject,  
Benchmarking, Resources & Project Planning, External costs

### Description of modules

#### Performance & CRM

With the Vertec basic module Performance & CRM, your company is perfectly organized. From customer relationship management (CRM) to performance recording and project and mandate management to **invoicing** and reporting.

#### Budget & Subproject

In the Budget & Subproject module, complex projects or mandates can also be handled and monitored transparently. For example, subprojects as well as phases can be divided into additional subprojects at will. The conditions for services, expenses and delivery types can be defined individually at each level.

#### Benchmarking

As a complete, integrated business intelligence solution, Vertec Benchmarking provides you with all the information you need to efficiently manage your business from exactly the angles that are relevant to your business. Analyze valuable information about cost structures and contribution margins in your company.

#### Resources & Project Planning

The Resources & Project Planning module is an efficient tool for the sustainable planning of your personnel assignment and your projects. If you want to see at a glance which of your employees still have spare capacities and you want to be sure at any time that the planned projects can actually be managed on time with the existing resources, Vertec is Resources & project planning is the ideal solution.

#### External costs

With the module external costs, third-party services such as supplier services or material costs can be easily and detailedly recorded, ordered, monitored and offset. If suppliers' services and invoices are to be managed for customer orders - for example, translation work or plan copying - then the Vertec external costs module is the ideal instrument.

#### Reference law firms

Vischer  
WalderWyss  
Roxin  
Ludwig + Partner  
Eversheds Sutherland  
Epartners  
Blomstein  
AMG Lawyers

**Includes interface maintenance and testing of the software**

**Yes**, we maintain the standard interfaces.  
Public releases go through testing.

### For documentations and explanation

<https://www.vertec.com/ch/support/kb/>  
<https://www.youtube.com/channel/UCJVNPuPpt5dGs4F0zkJKZqQ/playlists>  
<https://youtu.be/6tostHhMmfc>

### Offer the following features:

Mandate Management  
Conflict Check  
Deadlines  
Time tracking automated (stopwatch)  
Time tracking manually  
Invoicing automated  
Invoicing manually/individually  
Document Creation / Templates  
Accounting Interface to Sage/Abacus available  
Reporting/Reporting  
Files and folder structure  
Compliance and Audit Security  
Full-text search in the file and folder structure  
Mobile working of individual modules  
Contact Management (CRM)  
GDPR compliance  
see Vertec and the GDPR:  
<https://www.vertec.com/ch/blog/vertec-und-die-dsgvo/> and data protection in the FAQ:  
<https://www.vertec.com/ch/faq/#datenschutz>

**Security of dossier management implementation:**  
on roles and rights

## Technical

### Partial Outlook integration

#### Server systems

Windows Server 2019  
Windows Server 2016

#### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10  
Windows 8  
Windows 7

#### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix  
VMWare

### Law firm sizes

Solo  
5-10 Lawyers  
11-50 Lawyers  
51-100 Lawyers  
> 100 lawyers

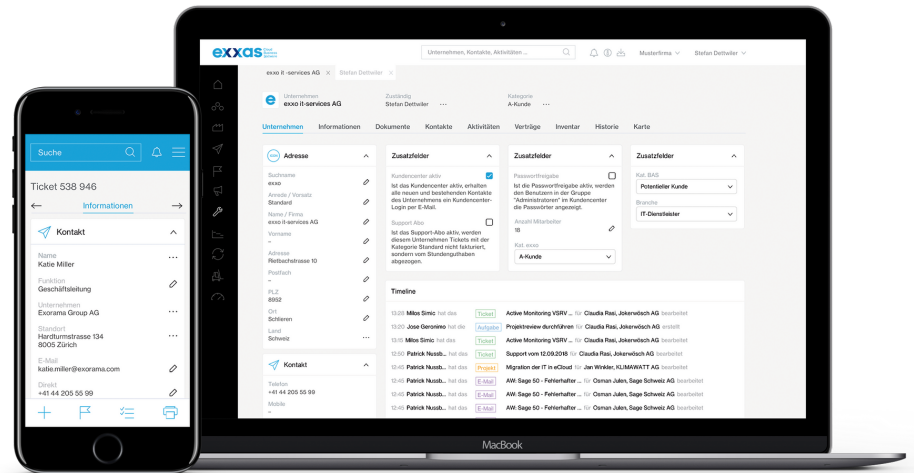
#### System architecture

Application Server  
Database Server

#### Data stored

On-Premise  
Cloud

Vertec does not offer its own DMS, but connections to various DMS solutions. The detection of the correct storage folder can be achieved by appropriate configuration.

**Exxas****De, En**

Name of the software

**Exxas**

Name of the company

**Exxo it-services AG**

Number of full-time positions

**22**

Turnover of the company

**undisclosed**

Swiss Headquarter

**Rietbachstrasse 10, 8952 Schlieren-Zurich**

Number of customers

**Over 400**

## Costs/Prices

### Pricing model

Monthly fee per Concurrent user

### Basis of assessment

Concurrent User relevant

### Offer a fixed migration price

Yes for migrations from WinJur and Ancoma. Price depends on data volume and WinJur Version.

### Offer a fixed price/cost roof for the implementation of your software

There are various fixed-price packages, depending on the desired size. As a rule, the introduction of Exxas ranges from CHF 2,4500 to CHF 30,000 depending on the size of the firm and the desired scope of the project.

### If the training by your company or the service partners is included in the price

Offered and reported in the project or introductory package.

## Service

**Size of the support team in Switzerland**  
20

**Offer data migrations -YES**

### Migrated data to your software

Various, e.g. Plato, Honoris, Ancoma or Winjur

**Includes interface maintenance and testing of the software**

Yes

**For documentations and explanation**

[www.exxas.net](http://www.exxas.net)

## Law Firm Software Modules

Full business platform. Comparison of functions under <https://www.exxas.net/preise/>

### Reference law firms

On request

### Security of dossier management implementation:

Information: Adjustable, e.g. mandatory fields

### Offer the following services:

- Mandate Management
- Conflict Check
- Deadlines
  - Power recording automated (stopwatch)
  - Power recording manually
- Invoicing automated
- Invoicing manually/individually
- Document Creation / Templates
- Accounting
- Reporting/Reporting
- Files and folder structure
- Compliance and Audit Security
- Secure data transfer with clients
- Mobile working of individual modules
- Mobile working of all modules
- Contact Management (CRM)
- GDPR Compliance

## Technical

### Partial Outlook integration

Description: Outlook add-in for emails and contacts

### Law firm sizes

- Solo
- 5-10 Lawyers
- 11-50 Lawyers
- 51-100 Lawyers

### Server systems

Windows Server 2019  
Windows Server 2016  
Cloud - operating system independent via the web browser

### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

### System architecture

Application Server  
Database Server

### Data stored

On-Premise  
Cloud

### Windows

Windows 10  
Windows 8  
Windows 7

Mac, iOS,  
Android,  
Linux

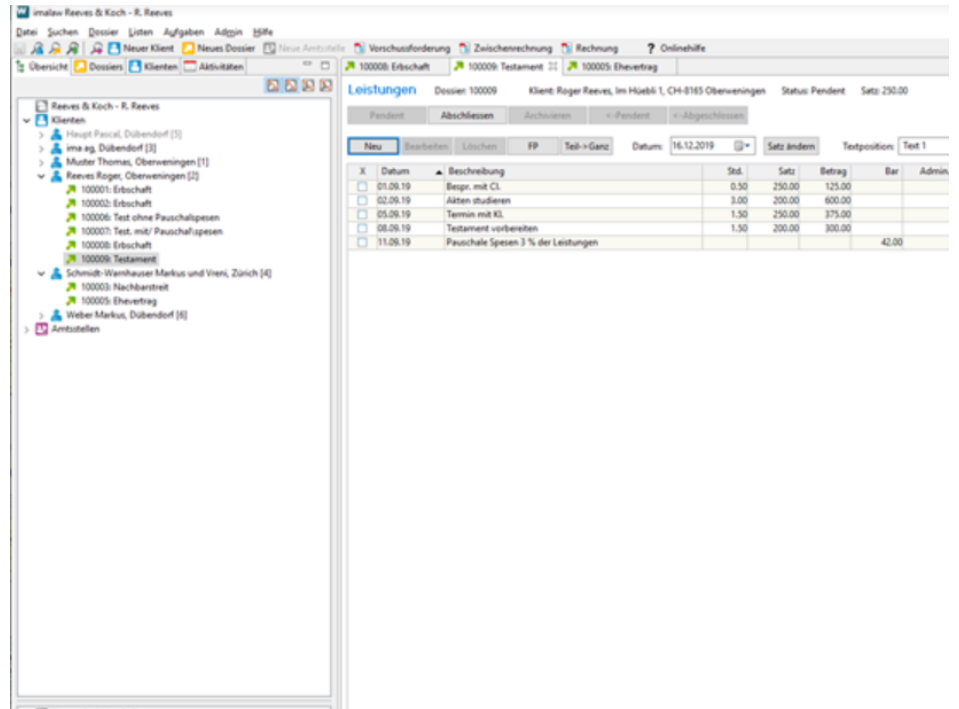
### Terminal server-based solutions

not needed already a cloud solution

DMS automatically detects the correct drop folder for incoming emails - NO

# ima ag

En



Name of the software

imaLaw  
law firm  
software®

Name of the company

ima ag

Number of full-time positions

3.5

Turnover of the company

Undisclosed

Swiss Headquarter

Dübendorf

Number of customers

approx. 40, 7 of which are the imaLaw version

## Costs/Prices

### Pricing model

**License model:** Purchase license + mandatory annual maintenance

**Subscription model:** annual fee

**Other model:** Purchase License + opt. annual maintenance  
monthlyforonline solution

### Basis of assessment

**User model:** Number of users relevant

**Professional model:** Number of lawyers relevant

### Offer a fixed migration price

NO

Offer a fixed price/cost roof for the implementation of your software

YES

If the training by your company or the service partners is included in the price

YES

## Service

### Size of the support team in Switzerland

3.5

### Offer data migrations - YES

### Migrated data to your software

-

Includes interface maintenance and testing of the software - YES

### For documentation and explanations

Documentation and demo videos

<https://ima.ch/de/imalaw>

## Law Firm Software Modules

Business administration, Client management, dossier management, accounting, customer accounting, lists and statistics, document management, template management, CRM

### Description of modules

- Several transactions (independent lawyers) can be processed with the same license in the same application
- Easy and easy-to-use client and dossier capture and management
- Fully integrated Accounts Receivable
- Detailed evaluations, including employee time control and turnover statistics
- Document management both in imaLaw and directly in the familiar Explorer directory
- Management and grouping of templates
- Many user-selectable options for optimal configuration of the application without programming effort

## Technical

### Partial Outlook integration

**Description:** Drag and drop emails into dossier folders. Capture e-mail directly from the application

### Server systems

Windows Server 2019  
Windows Server 2016  
Mac OSX, Linux

### Office versions

Office 365  
Office 2019  
Office 2016  
Office 2013

### Windows

Windows 10  
Windows 8  
Windows 7

### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix

### Offer the following services:

Mandate Management  
Deadlines  
Power recording manually  
Invoicing automated  
Invoicing manually/individually  
Document Creation / Templates  
Accounting  
Reporting/Reporting  
Files and folder structure  
Full-text search in the file and folder structure  
Mobile working of all modules  
Contact Management (CRM)

### Reference law firms

SSG Schwager Schmid Giusto, Zurich  
Adrian Fiechter, Widnau

### Security of dossier management implementation:

Cloud server is at ima ag, backups at ima ag

### Law firm sizes

Solo  
5-10 Lawyers  
11-50 Lawyers

### System architecture

Database Server  
Client/Server or Web Server

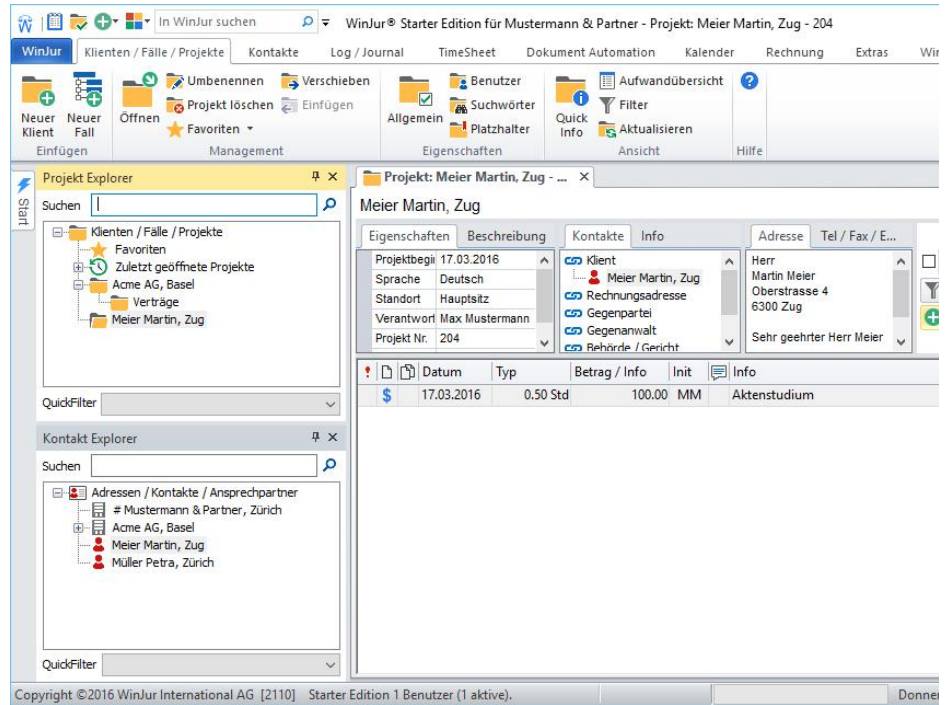
### Data stored

On-Premise  
Cloud

DMS automatically detects the correct drop folder for incoming emails - NO

# WinJur

De, En, Fr, It



Name of the software

WinJur

Name of the company

STP Information Technology Ltd.

Number of full-time positions

Ca.250

Turnover of the company

Ca. 30 million (estimated for 2019)

Swiss Headquarter

Karlsruhe Wallisellen

Number of customers

Ca.700

## Costs/Prices

### Pricing model

**License model:** Purchase license + annual maintenance

**Subscription model:** annual fee

**Offer a fixed price/cost roof for the implementation of your software**

Yes, after checking the actual situation

### Basis of assessment

**User model:** Number of users relevant

**If the training by your company or the service partners is included in the price**

Yes

### Offer a fixed migration price

Yes, after examination of the actual situation

## Service

### Size of the support team in Switzerland

Ca.20

### Offer data migrations - YES

### Migrated data to your software

WinJur, Ancoma, Plateau, Vertec, Honoris, Smart, Agora

Includes interface maintenance and testing of the software - YES

### For documentations and explanation

[www.winjur.ch](http://www.winjur.ch)

## Law Firm Software Modules

### WinJur, DMS, BI, CRM

#### Description of modules

##### WinJur

• Clients / Files Log / Journal • Timesheet • Timetracker • Document Automation • Outlook DropZone • Document • Calendar  
: Law Firm-Software  
• Bill • Extras / Search / Reports  
• Contacts / Addresses • E-mail-Creation • Apps

##### Dms

<https://www.winjur.ch/dokumentenmanagement.html> With the connection of WinJur to LEXolution.DMS Pro you get the highest level of security and Traceability when working with your documents. Digitized processes with cross-site access to all Document versions, coupled with maximum usability through integration with Outlook and Office, increase efficiency and streamlined processes.

##### BI Dashboard

Individual dashboards and visualized key figures enable strategic derivatives to control the law firm as a company. WinJur with LEXolution.BI - this means increase in sales by identifying cross-selling potentials, agility through a better view of your utilization, liquidity increase through consistent reporting. For more information:

[https://www.winjur.ch/business\\_intelligence.html](https://www.winjur.ch/business_intelligence.html)

##### Contact

Contact and event management  
With the integrated connection of WinJur to LEXolution.CRM you will receive a centralized contact management with an established Best Practice process for carrying out successful events and campaigns. Highest usability offers the Outlook integration and the multidimensional rights concept to fully support typical protection needs.

For more information:

<https://www.winjur.ch/client-relationshipmanagement.html>

## Technical

### Complete and Partial Outlook integration

**Description:** directly integrated into WinJur is the DMS and CRM, so that the "typical of the lawyer" areas of application

#### Server systems

Windows Server 2019  
Windows Server 2016

#### Office versions

Office 365 - on premise  
Office 2019  
Office 2016  
Office 2013

#### Windows

Windows 10  
Windows 8  
Windows 7 - no more recommended!

#### Terminal server-based solutions

Windows Remote Desktop Services  
Citrix  
VMWare

### Offer the following services:

Mandate Management  
Conflict Check  
Deadlines  
Power recording automated (stopwatch)  
Power recording manually  
Invoicing automated  
Invoicing manually/individually  
Document Creation / Templates  
Accounting ()Interface to Sage/Abacus available  
Reporting/Reporting  
Files and folder structure  
Compliance and Audit Security  
Full-text search in the file and folder structure  
Secure data transfer with clients  
Mobile working of individual modules  
Mobile working of all modules  
Address management  
GDPR- Conformity

### Reference law firms

Only by arrangement (compliance!)

### Security of dossier management implementation:

The rights system in LEXolution allows the setup of Chinese Walls, i.e. if necessary, access rights are restricted and non-authorized persons do not have access to dossier data and documents.

### Law firm sizes

Solo  
5-10 Lawyers  
11-50 Lawyers  
51-100 Lawyers  
> 100 lawyers x

### System architecture

Database Server

### Data stored

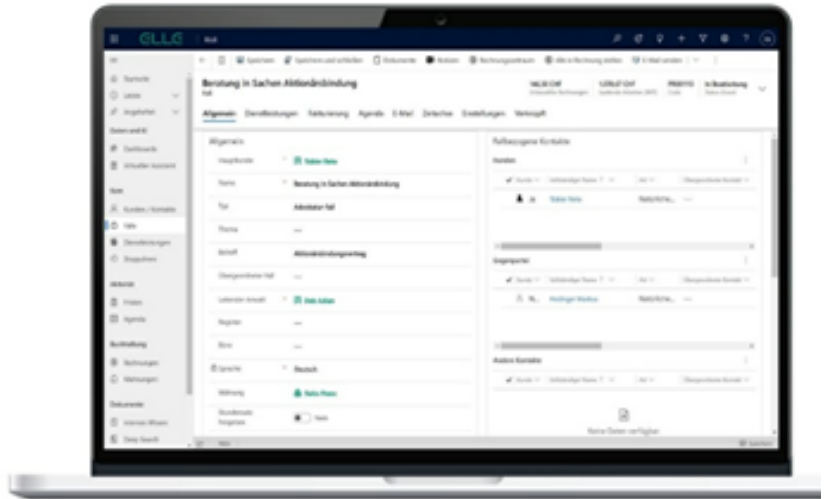
On-Premise  
Cloud

Incoming e-mails are detected on the one hand if they are the response to sent e- mails, on the other hand, on the basis of the sender address and/or a contained file number and then corresponding filing locations are suggested (from V 7.3)



**ELLE**

De, En, Fr, It



Name of the software

ELLE

Name of the company

Logol AG

Number of full-time positions

50

Turnover of the company

Undisclosed

Swiss Headquarter

Zug

Number of customers

Undisclosed

## Costs/Prices

### Pricing model

**Subscription model:** on monthly base

**Offer a fixed price/cost roof for the implementation of your software**

Yes

### Basis of assessment

**User model:** Number of users relevant

**If the training by your company or the service partners is included in the price**

Yes

### Offer a fixed migration price

Yes

## Service

### Size of the support team in Switzerland

6

### Offer data migrations - YES

### Migrated data to your software

WinJur, Plato, Vertec, ALAN, Timesensor, Agora, SAGE

Includes interface maintenance and testing of the software - YES

### For documentations and explanation

[www.elle.lawyer](http://www.elle.lawyer)

## Law Firm Software Modules

CMR, DMS, Invoicing, Agenda, Matters, Accounting, Security

### Description of modules

#### CRM

The CRM contains all your person related data like client, employee, authorities and counterparties. Beside the data you can show hierarchies, doing conflict checks and much more.

#### DMS

In the DMS you have all your data together separated for each case. You can collaborate and share documents with your working colleagues and with other people, e.g. clients. Your DMS can be used to share big volume of files easily and with high protection. In the DMS you have all your e-mails which are directly stored automatically from Outlook.

#### Invoicing

The Invoicing is presented very easy. You can create your hours and directly insert expenses also automated if you wish. You can create your hours directly or from stopwatches or from Outlook.

#### Agenda

Find all your appointments and due dates directly in the system, while its synchronized with Outlook. You can choose either to create it in the one or other system. You can also have a regular e-mail updating you with your upcoming appointments and due dates.

#### Matters

Use the Chatbot to fasten up some of your activities, while for example you are on your way. Use the dictation in many different languages. ELLE supports you in automated document creation.

#### Accounting

Do the credit risk monitoring for your legal office with your own dashboard and BI reports. Insert a automated work in progress notification. Use the option of automated dunnings.

#### Security

ELLE uses a high-level security, so as e-banking with a two factor authentication and encryption.

### Offer the following services:

Mandate Management  
Conflict check  
Deadlines  
Power recording automated (stopwatch)  
Performance recording  
Invoicing automated  
Invoicing manual/individual  
Document creation / templates  
Accounting  
Interface to Business Central/Sage/Abacus (and many more) available  
Reporting  
File and folder structure  
Compliance and audit security  
Full-Text search in the file and folder structure  
Secure data transfer with clients and other collaborators  
Mobile working on individual modules without terminal server, directly with a web browser  
Contact Management (CRM)  
Notary diary  
GDPR compliance

## Reference law firms

Upon request

### Security of dossier management implementation:

You can choose either that its all open for the members of the legal office or that you have to decide who has the right to see the dossiers.

## Technical

### Complete Outlook integration

#### Server systems

It is a cloud software, no additional servers needed.

#### Office versions

Microsoft 365

#### Windows

You can use any device on any operating system

#### Terminal server-based solutions

Not needed. It's a native cloud solution. Only a web browser is needed.

### Law firm sizes

Scalable from 1 - 10'000+ users

### System architecture

It's a cloud software, so you can reach by any device

### Data stored

In the cloud (in Switzerland Zurich and Geneva). Additional back up in your servers if you wish

DMS automatically detects the correct drop folder for incoming emails

Name of the software	Number of customers	License model	Subscription model	Offer a fixed price for implementation	Training included in the price
<b>timeSensor LEGAL</b>	280 law firms	Purchase license + mandatory annual maintenance	Annual fee		
<b>Aderant Expert</b>	530+	One-time perpetual license + annual	Annual fee – On Expert Sierra		
<b>Agora</b>	120+	Purchase license + mandatory annual maintenance	Annual fee	Depends on the size of the project	Calculated according to the number of people to be trained.
<b>Alan</b>	/	Purchase license + mandatory annual maintenance	Annual fee		Training courses are offered individually to customers
<b>Lexolution</b>	~ 700	Purchase license	Annual fee		
<b>Neo</b>	> 500	Neo can be installed on any number of computers. The number of paid licenses depends on the number of users who want to work with Neo simultaneously.		Free import from WinJur; other import interfaces are not available	
<b>Odoo</b>	>110,000 Companies worldwide >5 Million users on cloud platform	Purchase license + mandatory annual maintenance	Annual fee		
<b>Vertec</b>	> 1000 customers	Purchase license + mandatory annual maintenance	Annual fee		
<b>Exxas</b>	> 400	Purchase license per Concurrent Use	Monthly fee per Concurrent user		Offered and reported in the project or introductory package.
<b>ima ag</b>	~ 40 <i>7 of which are the imaLaw version</i>	Purchase license + mandatory annual maintenance	Annual fee		
<b>WinJur</b>	~ 700	Purchase license	Annual fee		
<b>ELLE</b>	/	/	Monthly fee		



SL  
TA



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[Linkedin.com/groups/7061104/](https://www.linkedin.com/groups/7061104/)

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