

# CloudLex Partners With Microsoft to Make Personal Injury Practice Management Software More Accessible and Practical

By Neil J. Squillante  
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CloudLex is a cloud-based practice management system for personal injury law firms that integrates with Microsoft 365 as well as other popular products such as Adobe Sign, DocuSign, and Google Workspace.

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Personal injury firms have unique practice management needs but rely just as heavily on Microsoft 365 as their peers in other practice areas. **CloudLex** bridges the gap by offering practice management specifically for personal injury firms with tight Microsoft 365 integration.

## The Killer Feature

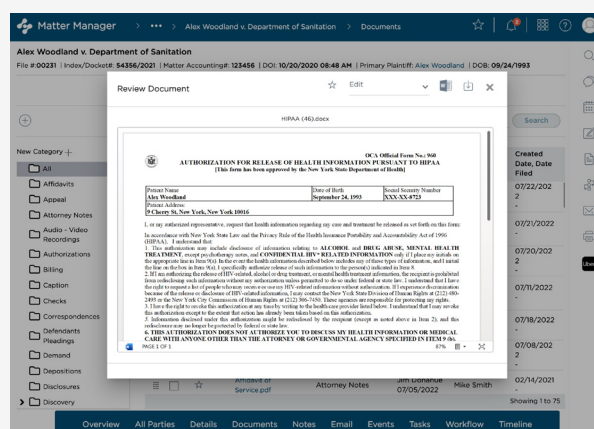
CloudLex set out to create an accessible personal injury practice management platform in contrast to generalized practice management products. “We want to make it easy to do your job,” says Founder and CEO Dev Shroti. CloudLex worked closely with Microsoft in four key areas — document automation, document management, email, and calendars.

Personal injury practices generate the same types of documents over and over. Templates in CloudLex use lead and client data to automatically generate Microsoft Word documents. Your CloudLex success

manager migrates your existing documents and teaches you how to create new templates.

CloudLex offers unique **legal document management features**. When you open a Word document from within CloudLex, it saves all your edits without the need for a cumbersome download/upload process. Free CloudLex add-ons for Word and Outlook let you save documents, email, and attachments to CloudLex and attach documents in CloudLex to outgoing messages. Once you connect an email message to CloudLex, it automatically saves all future messages in that thread. The Outlook add-in also syncs calendar events so that you can manage your schedule from both CloudLex and Outlook.

CloudLex has attracted thousands of personal injury attorneys since its launch, including Steven Schepps who owns the Law Office of Steven L. Schepps, LLC. “CloudLex lets you put all of your client’s case information, documents, events, medical records, photographs, emails, text messages, and contact information in one place,” says Schepps.



CloudLex streamlines personal injury law firm workflows with document assembly, document management, and integrations with Microsoft 365, Outlook, and Word.

“Our **unique partnership with Microsoft** was strategic and helped enable us to build one of the most easy-to-use, seamless integrations with Microsoft 365,” says Shroti. “From our HIPAA compliant hosting and archival storage on Microsoft’s Azure platform, to the latest enhancements to our Microsoft 365 integration, our goal has been to enable personal injury attorneys to work in a more efficient, centralized way using the tools they already use.”



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## Other Notable Features

Recognizing the volume of inquiries that even small PI firms attract, CloudLex includes an **Intake Manager** for tracking total leads, the number accepted, the conversion rate, and average case valuation for various time periods. CloudLex captures leads from your website, call centers, and manual entry. A web questionnaire that you can delegate to prospects captures the information you need to evaluate a case, including incident details and insurance coverage. The document automation tools in CloudLex generate retainer agreements, welcome letters, rejection letters, and other key intake documents.

When a lead becomes a client, CloudLex moves all the information collected thus far into the **Matter Manager**. Each matter contains a timeline (tickler)

of all activity, key details, key contacts, and all associated calendar events, documents, email, text messages, notes, etc. The Quick Action Toolbar lets you search, send email and text message, send faxes via eFax, and add expenses and notes. An **integration with Uber** lets you to order rides for clients, experts, and others and post the cost as an expense.

Each matter includes personal injury specific data tables for medical information, medical records, medical bills, case expenses, negligence liability, insurance, and liens. The medical records table lets you track which records you have received and which ones you still need. The medical bills table tracks total costs and payments. The Matter Manager also includes a **settlement calculator** for tracking offers and their status.

## What Else Should You Know?

CloudLex integrates with Google Workspace’s email and calendar services, Adobe Sign and DocuSign for e-signatures, and Microsoft OneDrive, Google Drive, and Dropbox for synced file storage. Apps for iPhone and Android keep you connected to your practice on the go.

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**2022**



## Meet Neil J. Squillante

Neil J. Squillante is the founder and publisher of [TechnoLawyer](#), an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer newsletters the only ones they need. A Fastcase 50 award winner, Neil has a long track record of inventing successful advertising and publishing technologies and related best practices. Previously, Neil practiced commercial litigation at Am Law 100 firm Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University. At UCLA, Neil served as a Managing Editor of UCLA Law Review.



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## Experience CloudLex

See the benefits of using a client intake and practice management system designed in close collaboration with Microsoft specifically for personal injury law firms.

**GET FREE DEMO »**

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