ACTEC Software Survey
Technology in the Practice Committee

Reviewer Name

Jim Worthington

Date (mm/dd/yyyy)

02/04/2018

Operating System

Windows 8.1

Software being reviewed:

Doxsera

Version Number, if any:

3.5.1.007

Vendor Name:

The FormTool

Vendor URL:

www.theformtool.com

How long have you used the software?

	Demo only	Less than 1 year	1-3 years	4-6 years	7-9 years	10+ years
Software usage	○	○	◉	○	○	○

How satisfied are you with the software?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	○	○	○	○	◉
Price	○	○	○	○	◉
Customer support	○	○	◉	○	○
Ease of Use	○	○	○	○	◉

Overall, does this software meet your needs?

◉ Yes

○ Somewhat

○ No

Have you used any software in the same category? If so, please include name:

I used HotDocs years ago but it is too cumbersome for my solo practice needs.

Please provide a substantive review of this software below.

This software uses the fields and macros inside Word(R) to automate documents. It is easy to set the documents up. There are multiple versions but Doxsera allows you to automate multiple documents at once. You have to take care to label the fields consistently among documents for that to work. The customer service is a weak point. Questions I've asked have frequently been met with admonitions to read the manual more closely. On that point, the manual is quite good and thorough. There is a weekly free class and numerous instructional videos to make up for the lack of one on one customer service. Overall, the product has sped up my document production for both planning and administration and allowed me to set many more flat fees.

Please return your completed survery to
Karen Stockmal at karen.stockmal@kmslawoffices.com.

All surveys will be reviewed before being submitted
for publication on the private side the ACTEC website, www.actec.org.