



SANDY, UTAH • FAMILY-OWNED SINCE 2009



CERTIFIED IMPLEMENTATION  
PARTNER SINCE 2019

## FILEVINE IMPLEMENTATION

# Set up the way your firm works.

We implement Filevine Core, Document Assembly (FVDA/Outlaw), Periscope and Lead Docket, and we specialize in LOIS: setting up the pieces your practice area needs and showing your staff how to get the most out of it. Every package below is a starting point.

### START HERE

## Free 30-minute review call

We map your needs and share best practices at no charge.

### INCLUDED IN EVERY PACKAGE

#### Hands-on live training and configuration, personalized for your team.

Every session is live with your team, on your own cases and your own workflows. We don't hand you recordings and call it training, because a video can't personally address every question you will have. Each package includes a kick-off call, configuration and product training hours, all-user Q&A sessions and an admin go-live training, then 30 days of remote support once you're live.

### AFTER GO-LIVE 30 days of remote support

Then a managed service plan or ad-hoc hours.

#### STANDARD Solo

1–3 users

**Starting from  
\$2,500**

**6** hours of live configuration/training included

##### Custom configuration:

- 1 project template (1 practice area)
- 5 FVDA document templates
- All task flows, deadline chains and reports
- Settlement statement build or time & billing set-up, depending on practice focus
- LOIS set-up, permissions review, AI training

#### STANDARD Small Firm

3–6 users

**Starting from  
\$3,500**

**7** hours of live configuration/training included

##### Custom configuration:

- 1 project template (1 practice area)
- 10 FVDA document templates
- All task flows, deadline chains and reports
- Settlement statement build or time & billing set-up, depending on practice focus
- LOIS set-up, permissions review, AI training

#### STANDARD Growing Firm

6–10 users

**Starting from  
\$5,000**

**10** hours of live configuration/training included

##### Custom configuration:

- 2 project templates (2 practice areas)
- 15 FVDA document templates
- All task flows, deadline chains and reports
- Settlement statement build or time & billing set-up, depending on practice focus
- LOIS set-up, permissions review, AI training

#### STANDARD Mid-Size Firm

10–20 users

**Starting from  
\$6,500**

**12** hours of live configuration/training included

##### Custom configuration:

- 3 project templates (3 practice areas)
- 25 FVDA document templates
- All task flows, deadline chains and reports
- Settlement statement build or time & billing set-up, depending on practice focus
- LOIS set-up, permissions review, AI training

#### STANDARD Large Firm

20+ users

**Starting from  
\$10,000**

**15** hours of live configuration/training included

##### Custom configuration:

- 3+ project templates (3+ practice areas)
- 30 FVDA document templates
- All task flows, deadline chains and reports
- Settlement statement build or time & billing set-up, depending on practice focus
- LOIS set-up, permissions review, AI training

“Hiring Yessio was game-changing for our law firm. Filevine rocked before Yessio started helping us, but once Yessio stepped in and created some docs and reports for us, we are operating at a much higher level. It's impressive how quickly Yessio can understand what it is that you need and how quickly Yessio can create it for your firm. If you want the most out of Filevine, consult with Yessio today!”

**YOSHA COOK & TISCH**

“Over the past year we have worked with Yessio to move our voluminous documents into Filevine. They have been instrumental in the process and have demonstrated professionalism, positivism and pleasantness.”

**STARK & STARK**

“Our experience with Yessio was simply great. They understood exactly what was needed and got our customized Filevine and doc automation up and running in a timely fashion. This has improved our efficiency and overall service experience with our clients. We would definitely use their services again!”

**THE ADVOCATES INJURY ATTORNEYS**

Extra project templates (one per practice area) \$800; extra FVDA templates from \$50. Additional training/configuration hours can be added to any package; most firms add hours at the discovery call. After go-live, continue on a managed service plan or ad-hoc hours.



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## ADDING DATA MIGRATION

# Bring your data with you.

Migration is always scoped alongside an implementation. We don't take migration-only engagements. We review your source systems, data access and scope on the discovery call, then recommend the tier that fits your budget.

### Standard DOCS & MATTERS

**\$2,500–\$4,000**

Up to 250 matters  
Up to 500 GB documents  
1 source system

Matters, clients, contacts and documents. Best fit for a firm leaving one system with a clean, recent caseload.

### Custom TWO SOURCE SYSTEMS

**\$4,000–\$6,000**

250–1,000 matters  
500 GB – 1 TB documents  
Up to 2 source systems

Adds calendar, tasks, notes, 15 static custom fields, plus test migration and reconciliation.

### Advanced FULL CASE HISTORY

**\$6,000–\$10,000**

1,000–3,000 matters  
1 TB+ documents  
Up to 2 source systems

Adds static custom fields, collections (meds, insurance, liens, expenses) and deadline chains.

**Time & billing migration**, a separate add-on to any tier above, bringing billing and financial history where applicable.

**\$1,000–\$3,000**

## STANDARD IMPLEMENTATION

### Implementation only

**Weeks 4–6:** live, opening new cases.

**Through week 12-15:** training, support and optimization.

## IMPLEMENTATION + MIGRATION

### Implementation + migration

**Weeks 4–6:** configured and live for new cases.

**Weeks 12–15:** migration completes, timed from when we get access to your sources.

**Through week 20:** support and optimization.

SCOPE IT ON THE DISCOVERY CALL  
Free 30 minutes, no obligation.

[yessio.com](https://yessio.com)



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## AFTER GO-LIVE

# Keep it running.

Your 30 days of go-live support don't have to be the end of it. Stay on a monthly plan or call us when you need us. There's no contract either way, and you can scale up or down as your firm changes.

### MANAGED SERVICE PLAN Your fractional Filevine admin

**\$500**  
per month

Two and a half hours a month, billed month to month with no timeline contract. Unused hours can roll over if you need them. Use them however the firm needs:

- New-hire onboarding and training
- Template updates as your forms and letters change
- New custom reports, doc gen and FVDA templates
- Task flow, deadline chain and workflow adjustments
- Time & billing and invoicing
- New practice areas and project sections added
- LOIS and best practices applied as you grow
- Team KPI review and system health checks
- Client portal set-up and maintenance
- Questions answered, with hands-on help when stuck

### AD-HOC SUPPORT Only when you need it

**\$250**  
per hour

No monthly commitment and no minimum. We scope the work before we start, so you know the cost up front.

#### MOST OFTEN

- A report or export you can't get to work
- Template builds and adjustments
- A settlement statement or disbursement sheet
- A workflow change after a process shift
- A refresher session for staff
- Clean-up after the wrong setting got changed

## INDIVIDUAL PROJECTS, PRICED UP FRONT

|                                                 |                  |                                                        |                 |
|-------------------------------------------------|------------------|--------------------------------------------------------|-----------------|
| Additional Filevine Core template               | <b>\$1,000</b>   | Lead Docket, one practice area (3 wks)                 | <b>\$1,500</b>  |
| Extra project template build-out                | <b>\$800</b>     | Lead Docket, two to three practice areas               | <b>\$2,500</b>  |
| Project template added to an org package        | <b>\$1,500</b>   | FVDA standard set-up (5 templates, 3 wks)              | <b>\$1,500</b>  |
| Custom report fusion build-out                  | <b>\$500</b>     | FVDA pro launch (20 templates, 6 wks)                  | <b>\$2,500</b>  |
| Additional doc gen template (min. 5)            | <b>\$40</b>      | LOIS set-up and best practice training (Filevine's AI) | <b>Scoped</b>   |
| Additional FVDA template (tiered by complexity) | <b>From \$50</b> | Client portal set-up and maintenance                   | <b>Scoped</b>   |
|                                                 |                  | On-demand training session                             | <b>\$250/hr</b> |

NOT SURE WHICH YOU NEED?  
Free 30 minutes, no obligation.

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