



## Yessio

Your Trusted Filevine Partner Since 2019

### About Yessio

Family-owned and based in Sandy, Utah, Yessio has been in business since 2009. As a dedicated Filevine partner since 2019, we specialize in implementing Filevine Core, Document Assembly (FVDA/Outlaw), Periscope, and Lead Docket, helping law firms streamline operations and boost efficiency.

### Why Choose Yessio?

Our expert team, led by professionals, delivers customized solutions to optimize your Filevine experience. We handle document creation, report generation, and system updates, saving you time and effort. Yessio acts as an extension of your team, providing consistent, high-quality results and actionable advice to maximize your firm's potential.

### What Our Clients Say

- "Yessio has been instrumental in moving our voluminous documents into Filevine with professionalism and positivism." — **Stark & Stark**
- "Thanks to Yessio's expertise, our customized Filevine and doc gen were up and running quickly, improving our efficiency." — **The Advocates Injury Attorneys**
- "Hiring Yessio was game-changing. They helped us operate at a much higher level with Filevine." — **Yosha Cook & Tisch**

Contact Yessio today to elevate your Filevine experience! Visit us at [www.yessio.com](http://www.yessio.com)

## Yessio Filevine Implementation Packages

Unlock the full potential of Filevine with our tailored implementation packages. Each package is designed to streamline your workflow, enhance productivity, and maximize your firm's efficiency. Choose the package that best suits your needs or contact us for a customized solution.

| Package                               | Quick Launch             | Starter Basic            | Starter Plus             | Pro Launch             | Enterprise             |
|---------------------------------------|--------------------------|--------------------------|--------------------------|------------------------|------------------------|
| <b>Duration</b>                       | 1 Month                  | 1 Month                  | 2 Months                 | 3 Months               | 5 Months               |
| <b>Price</b>                          | \$3,000                  | \$3,500                  | \$5,000                  | \$7,500                | \$10,000               |
| <b>Discount Price</b>                 | \$2,000                  | \$2,500                  | \$3,500                  | \$5,000                | \$7,500                |
| <b>Design &amp; Onboarding Set-Up</b> |                          |                          |                          |                        |                        |
| Kick-off Call                         |                          |                          |                          |                        |                        |
| Configure Intake & Case Summary       | 1 sections               | 2 sections               | 3 sections               | 4 sections             | 5 sections             |
| Custom Configuration                  | -                        | 1                        | 1                        | 2                      | 2                      |
| User Q&A Sessions                     | 1                        | 1                        | 2                        | 2                      | 2                      |
| Admin Go Live Training                | 1                        | 1                        | 1                        | 1                      | 1                      |
| Product Training Sessions             | 1                        | 2                        | 3                        | 5                      | 8                      |
| Customization Sessions                | -                        | 1                        | 1                        | 2                      | 4                      |
| Go Live Remote Support                | -                        | -                        | -                        | 1 Day                  | 2 Days                 |
| Post Go Live Follow-Up                | -                        | -                        | -                        | 1                      | 1                      |
| <b>Customized Deliverables</b>        |                          |                          |                          |                        |                        |
| Reports                               | 3                        | 3                        | 5                        | 7                      | 10                     |
| Task Flows/Phase or Widget Setup      | 10                       | 10                       | 10                       | 15                     | 25                     |
| Doc Gen/Email Templates               | 5                        | 10                       | 10                       | 20                     | 30                     |
| Report Fusion                         | 1 (Settlement Statement) | 1 (Settlement Statement) | 1 (Settlement Statement) | 2 (Settlement & Other) | 2 (Settlement & Other) |
| Deadline Chains                       | -                        | -                        | 2                        | 2                      | 3                      |

## Yessio Filevine Add-On Services

| Service                                                       | Price          |
|---------------------------------------------------------------|----------------|
| Additional Filevine CORE Templates                            | \$1,000 (each) |
| Add-On Project Template to Org Imp Package                    | \$2,000        |
| Add-On Data & Docs Migration (Spreadsheet, up to 150 files)   | \$2,500        |
| Add-On Data & Docs Migration (Data Sheet and Docs)            | \$4,000        |
| Add-On Lead Docket (Standard Package, 3 Weeks)                | \$1,500        |
| Add-On FVDA Standard Set Up (5 Templates, Set Up, 3 Weeks)    | \$1,500        |
| Add-On FVDA Pro Launch Set Up (20 Templates, Set Up, 6 Weeks) | \$2,500        |
| Maintenance Package (2 Hours/Month Training & KPIs)           | \$500          |
| Additional Hours for Training or Custom Work                  | \$250/hour     |
| Additional Doc Gen Templates (Minimum 5 templates)            | \$40           |
| Additional FVDA Templates                                     | \$50           |

### Lead Docket Package

- Build intake questionnaire
- Add referral and marketing sources for tracking
- Setup integrations with lead generation services
- Customize automated tasks and messages
- Customize lead statuses to fit your workflow
- Create digital forms for client information
- Setup document templates for intake
- Add users and assign permissions/roles

### Filevine Document Assembly or FVDA Package

- Configure custom data fields for one practice area
- Set up conditional template logic for dynamic data capture
- Create automated workflows tailored to your practice
- Design custom reports for data analysis
- Integrate with document generation for seamless output

### Maintenance Package for Support Ongoing

Our Maintenance Package for Support Ongoing provides cost-effective, flexible monthly plans designed to act as your dedicated Filevine Admin, allowing your firm to focus on client management while we optimize your Filevine experience. Priced at \$500 for 2 hours per month, this package includes expert training, system management, and performance optimization tailored to your firm's needs. Use these hours to:

- Address questions and receive personalized support
- Create custom reports and document templates
- Implement best practices to enhance efficiency
- Scale support up or down based on your firm's requirements