ToolGPA

NOVEMBER 2026

SurePoint

The Insider's Guide

Practice, finance and growth software for mid-sized law firms



Every plan, grade, refund rule and rival among law practice software, read from SurePoint's own pages.

Made by SurePoint Technologies · checked Nov 13, 2026 · toolgpa.com

2.0
GPA



Contents

01 Welcome
What it is, who it suits, its grades and the ten things to know first

02 What it costs
Every plan, the free plan, ways to pay less and how prices have moved

03 What it does
Its main features, where it runs, what it works with and who makes it

04 Where it stands
Its grades against its category, and whether to keep it or make your own

05 The alternatives
The tools it is most often weighed against, side by side

06 Quick answers
The questions people ask about it, each answered in a line or two

07 About ToolGPA
Who made this guide, what else is on the site, and how to cite it

ToolGPA put this guide together from SurePoint's own pages, its app-store listings and our grades. Every fact in it is on SurePoint's page too, where it is kept up to date. Checked Nov 13, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

2.0

GPA, above 17 of the 35 other law practice software we grade

SurePoint sells a suite for mid-sized law firms: SurePoint Pro (Practice Pro and Finance Pro) for practice and financial management, separate accounting products, a CRM, payment services and Legal Insights, a legal market data product. Prices are not published; firms request a demo.

To get you started, here are **7 things to know about SurePoint**, taken from its own pages and our grades.

> **No price is published, every page points to a demo, and the products are split so you work out which mix you need.**
>
> From our report card of SurePoint

1 **Best for practice and finance software for mid-sized firms**

SurePoint sells practice management, time entry, finance products, payments and a CRM for mid-sized law firms.

2 **It runs on Web**

Web.

3 **Practice management**

Time, documents, deadlines, caseloads and tasks in a cloud-based platform that covers a matter from intake to billing and collections.

4 **Time entry**

Attorneys can capture billable time from the office or on the go and manage their caseload from a dashboard.

5 **Finance products**

Finance Pro covers each stage of the billing cycle. Finance Core is aimed at firms with small accounting teams, and Finance Enterprise at firms with distributed accounting.

6 **A 2.0 GPA, above 17 of 35**

That is against the other law practice software we grade, on value, the free plan, features, ease of use and platforms.

7 **Keep it**

To replace SurePoint you would be making client trust accounts kept the way bar rules require. That is not a weekend's work, with an AI app builder or without one.

SurePoint at a glance

PRICING Paid	FREE PLAN No
FREE TRIAL None stated	RUNS ON Web
MADE BY SurePoint Technologies	CATEGORY Law Practice Software
OUR GRADE 2.0 GPA, fair	

The report card

Best for practice and finance software for mid-sized firms

SurePoint sells practice management, time entry, finance products, payments and a CRM for mid-sized law firms. No price is published, every page points to a demo, and the products are split so you work out which mix you need.

TOOLGPA REPORT CARD — **SurePoint** — Graded Nov 13, 2026

SUBJECT	GRADE	COMMENT
Value for money	C	No price is published; every product page points to a demo request.
Free plan and trial	F	No free plan and no free trial are listed anywhere on the pages we read.
Features	B	Practice management, time entry, finance products, payments, CRM and legal market data. The listing shows no gap in the core job.
Ease of use	C	No store rating on record. Choosing among Practice Pro and the finance products means setup work.
Platforms and integrations	B	Web with Microsoft 365, NetDocuments, Box, Adobe and QuickBooks Online. No platforms are listed.

Grade point average — Fair, out of 4.0 **2.0**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who SurePoint is for

- ✓ Fits if you run a mid-sized firm that needs practice and finance tools
- ✓ Works for firms already on Microsoft 365 or NetDocuments

Who it is not for

- ✗ Too light for nothing, but too big for solo lawyers and very small firms
- ✗ Skip it if you want a price first, as every page points to a demo
- ✗ Watch out: it's split into Practice Pro, Finance Pro, Finance Core and Finance Enterprise
- ✗ Watch out: the pages don't list operating systems or mobile apps

Good to know

Good for

- ✓ Mid-sized law firms that want practice and accounting products from one vendor
- ✓ Firms with their own accounting team that need heavier billing tools

Worth knowing

- ⓘ No prices are published; every product page points to a demo request.
- ⓘ The suite is split into products such as Practice Pro, Finance Pro, Finance Core and Finance Enterprise, so a firm must work out which mix it needs.
- ⓘ The vendor aims at mid-sized firms, so solo practitioners and very small firms may find the suite larger than they need.
- ⓘ The pages read do not list supported operating systems or mobile apps.

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

SurePoint's current pricing could not be confirmed from its own site.

> **No price is published; every product page points to a demo request.**
>
> From our grade for value for money

We could not confirm SurePoint's current prices from its own site, so this guide lists no plans. surepoint.com has them.

What it does

Its main features, where it runs, what it works with and who makes it

1

Place it runs: Web

Practice, finance and growth software for mid-sized law firms. Here is what it does, as its own site describes it, and what it covers: calendar, time tracking, invoicing, reports, case management, trust accounting.

> **Practice management, time entry, finance products, payments, CRM and legal market data.**
>
> From our grade for features

Practice management

Time, documents, deadlines, caseloads and tasks in a cloud-based platform that covers a matter from intake to billing and collections.

Time entry

Attorneys can capture billable time from the office or on the go and manage their caseload from a dashboard.

Finance products

Finance Pro covers each stage of the billing cycle. Finance Core is aimed at firms with small accounting teams, and Finance Enterprise at firms with distributed accounting.

Legal Insights

Formerly Leopard Solutions, it supplies competitive data used for recruiting, business development and strategy, and is combined with a firm's own data in SurePoint Pro.

Payments and CRM

SurePoint Payment Services helps clients pay the firm, and SurePoint CRM (ContactEase) covers client relationships and marketing.

Security and access

The vendor lists SOC 2 compliance, two-factor authentication and per-person or per-group access rights for ZenCase, the product behind SurePoint Pro.

Where it runs

Web

What it works with

Microsoft 365
NetDocuments
Box
Adobe
QuickBooks Online

SurePoint is made by SurePoint Technologies.

PART 04 · STANDING

Where it stands

Its grades against its category, and whether to keep it or make your own

17/35

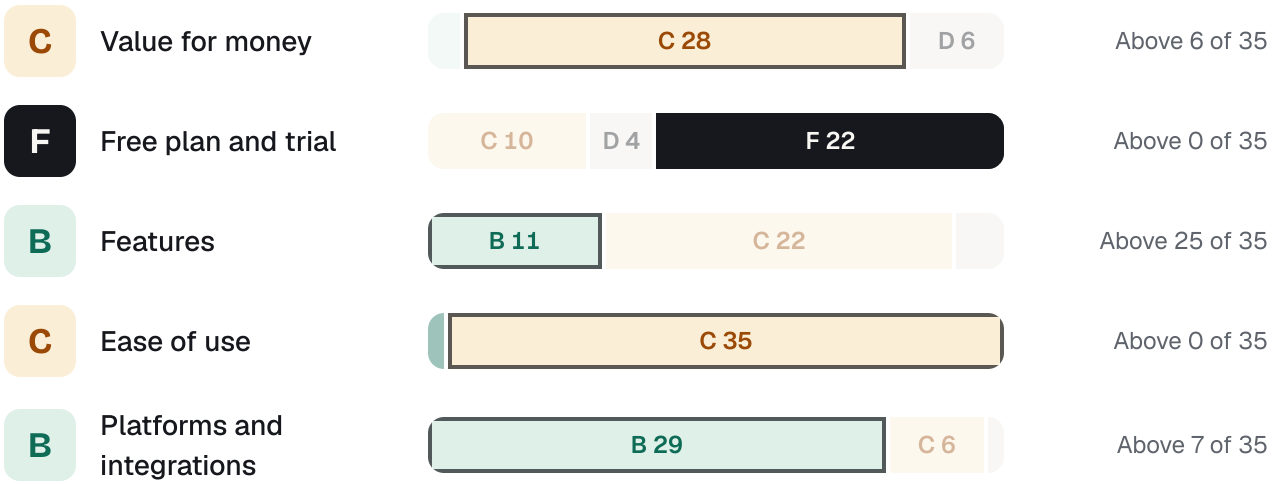
Other law practice software it is graded above

SurePoint's GPA of 2.0 is higher than 17 of the 35 other law practice software we grade, and level with 11.

It stands best on features (B, above 25 of 35) and worst on free plan and trial (F, above 0).

Each grade against the category

Every bar is all 36 law practice software we grade, cut by the letter each got. SurePoint's own letter is outlined.



Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace SurePoint you would be making client trust accounts kept the way bar rules require. That is not a weekend's work, with an AI app builder or without one.

What you could make

- Case management, time tracking, invoicing, calendar and reports: an app builder makes these well.

What you could not

- Client trust accounts kept the way bar rules require.
- It plugs into other products, Microsoft 365, NetDocuments and Box among them.
- What a company asks for before it lets staff use something: SOC 2.
- The depth: we grade its features B, which means it covers the whole job.

What this rests on. SurePoint's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



Tabs3, Centerbase, Clio, Aderant and CosmoLex

The 5 tools SurePoint is most often weighed against, with where each one differs from it.

T

1.8
GPA

Tabs3

Free trial · from $69/mo

Legal billing, trust accounting and case management for law firms.

- SurePoint also covers calendar.
- Tabs3 also covers workflow automation.

SurePoint and Tabs3 compared in full

2.0
GPA

Centerbase

Paid

Practice management, billing and firm accounting for midsize firms.

- Only Centerbase lists iOS and Android apps.
- SurePoint also covers calendar.
- Centerbase also covers bookkeeping.

SurePoint and Centerbase compared in full



2.8
GPA

Clio

Free trial · from $49/mo

Practice management, legal accounting and legal AI for law firms.

- Only Clio lists iOS and Android apps.
- SurePoint also covers calendar and reports.
- Clio also covers bookkeeping.

SurePoint and Clio compared in full



1.6
GPA

Aderant

Paid

Time, billing and financial software for large law firms.

- SurePoint also covers case management.
- Aderant also covers applicant tracking.

SurePoint and Aderant compared in full



2.2
GPA

CosmoLex

Free trial · from $49/mo

Law practice management with trust and business accounting built in.

- Only CosmoLex lists iOS and Android apps.
- SurePoint also covers calendar and reports.
- CosmoLex also covers bookkeeping.

SurePoint and CosmoLex compared in full

PART 06 · QUESTIONS

Quick answers

The questions people ask about it, each answered in a line or two

10

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is SurePoint free?

No. SurePoint is a paid product.

What platforms does SurePoint work on?

SurePoint is available on Web.

Does SurePoint have an Android app?

No Android app was listed when its pages were read on Nov 13, 2026. SurePoint is listed for Web.

Does SurePoint have an iPhone app?

No iPhone app was listed when its pages were read on Nov 13, 2026. SurePoint is listed for Web.

Is SurePoint open source?

SurePoint is not described as open source on its own site, as read on Nov 13, 2026.

What does SurePoint integrate with?

SurePoint's listing names Microsoft 365, NetDocuments, Box, Adobe and QuickBooks Online.

Who makes SurePoint?

SurePoint is made by SurePoint Technologies.

What are the alternatives to SurePoint?

The closest alternatives to SurePoint in our directory are Tabs3, Centerbase, Clio, Aderant and CosmoLex.

How does SurePoint compare with other law practice software?

SurePoint's GPA of 2.0 is higher than 17 of the 35 other law practice software we grade, and level with 11.

Could I make my own version of SurePoint?

To replace SurePoint you would be making client trust accounts kept the way bar rules require.

Where this guide comes from

The prices, plans, platforms and features were read from SurePoint's own pages on Nov 13, 2026, and the grades were given on Nov 13, 2026. Graded from this listing, whose facts were read from SurePoint's own pages on 13 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by SurePoint Technologies. Prices change, so check surepoint.com before you buy.

surepoint.com/
surepoint.com/about-us/
surepoint.com/practice-solutions/

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

7,721

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at **toolgpa.com**.

7,721	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

SurePoint, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/surepoint

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "SurePoint: The Insider's Guide",
checked Nov 13, 2026.
https://toolgpa.com/tools/surepoint
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Know someone choosing between law practice software?

Send them this guide:
toolgpa.com/tools/surepoint/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded law practice software after SurePoint, each with an Insider's Guide of its own.

Law Practice Software Insider's Guide

Every one of the 36 law practice software we grade, compared

Clio Insider's Guide

Practice management, legal accounting and legal AI for law firms

2.8 GPA

CARET Legal Insider's Guide

Cloud practice management with billing and accounting for law firms

2.2 GPA

CosmoLex Insider's Guide

Law practice management with trust and business accounting built in

2.2 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what SurePoint's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. SurePoint is a trademark of its owner, and this guide is not made, paid for or approved by SurePoint Technologies. Prices and plans change: check surepoint.com before you buy.