

## Firm Setup Information

Select [Systems] on the Main Menu Bar.

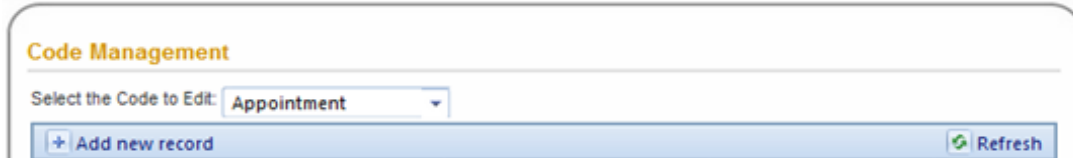
Select #1 to view help articles, the User Guide and this Quick Start Manual

Select #2 to add or modify a user account

Verify Firm Name, insert address, telephone, FAX and e-mail.

## Code Management

Select #3 to manage Systems codes which are designed to make your work easier by providing drop-in text for reoccurring descriptions



(You then don't have to type text over and over again.) The other advantages: (a) consistency in describing work or events (especially important in insurance defense or where LEDES billing is in use), (b) Providing default amounts for expenses such as a court filing fee, default mileage and copy charges, and default flat-rate (task-based) billing amounts. Shown below is the top of the selection form used to locate and change systems codes. **Select the Code to Edit:** (from drop-down menu). See Page11 for Calendar Codes (Appointment is the first item in the list).

### The code categories are:

1. Calendar & Task
2. Billing Categories
3. Billing Codes
4. Case / Matter categories
5. Case / Matter codes
6. Fee Plans
7. Narrative Codes (autoBilling) with drop-in text and billable Y/N?
8. Case / Matter status
9. Marketing Codes

Select #4: Please begin here. CompleteLAW-Web provides a complete set of everything you need to begin working with client matters except individual hourly rates. View instructions on pages 8 and 9.

**\*\* Please make code selections as soon as possible – you will be glad you did \*\***