User Setup

Before you begin using the software follow the guidelines below to make sure all systems codes have been setup properly. The Administrator is pre-set on activation of the program.

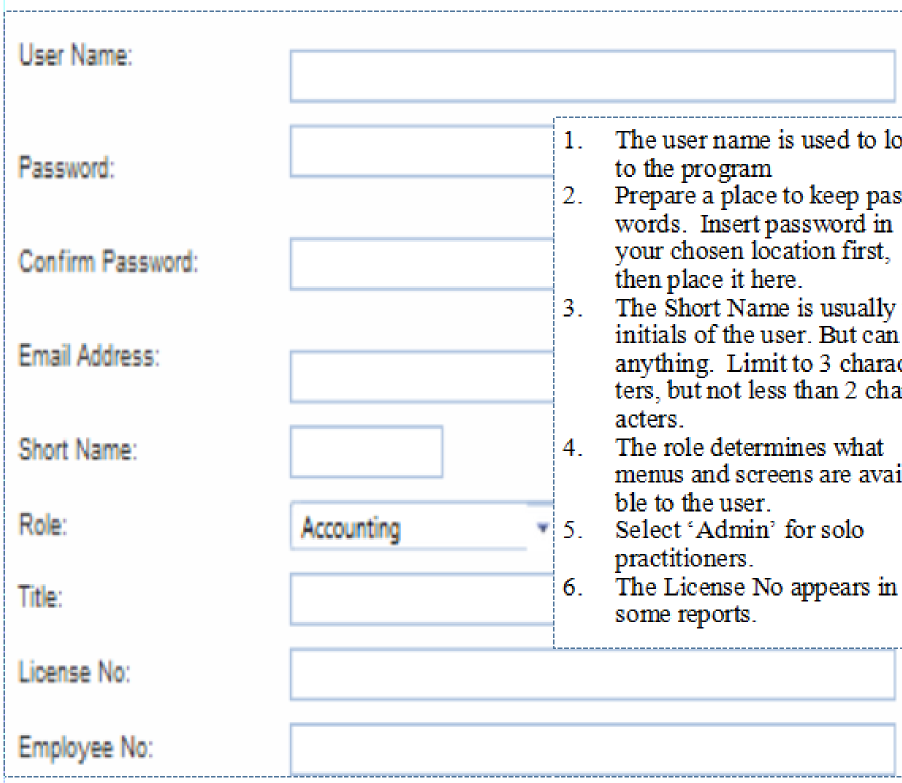
Please have all the information necessary for each user. This includes Initials, license Number, Phone and extension, Email addresses, etc.

Go to Main Menu → System and select #2 to add users

Click **[Add New]** button and insert requested information

Place Users **Initials** in **Short Name. Initials are used** for displaying **daily calendars** and are used in Reports and Billing. *(use 2 or 3 initials)*

Be sure and select a **User Role. I.E., Partner, Managing Attorney, Associate, Secretary, Para Legal, etc. Select from drop-down menu displayed below.**



1. The user name is used to login to the program
2. Prepare a place to keep passwords. Insert password in your chosen location first, then place it here.
3. The Short Name is usually the initials of the user. But can be anything. Limit to 3 characters, but not less than 2 characters.
4. The role determines what menus and screens are available to the user.
5. Select 'Admin' for solo practitioners.
6. The License No appears in some reports.