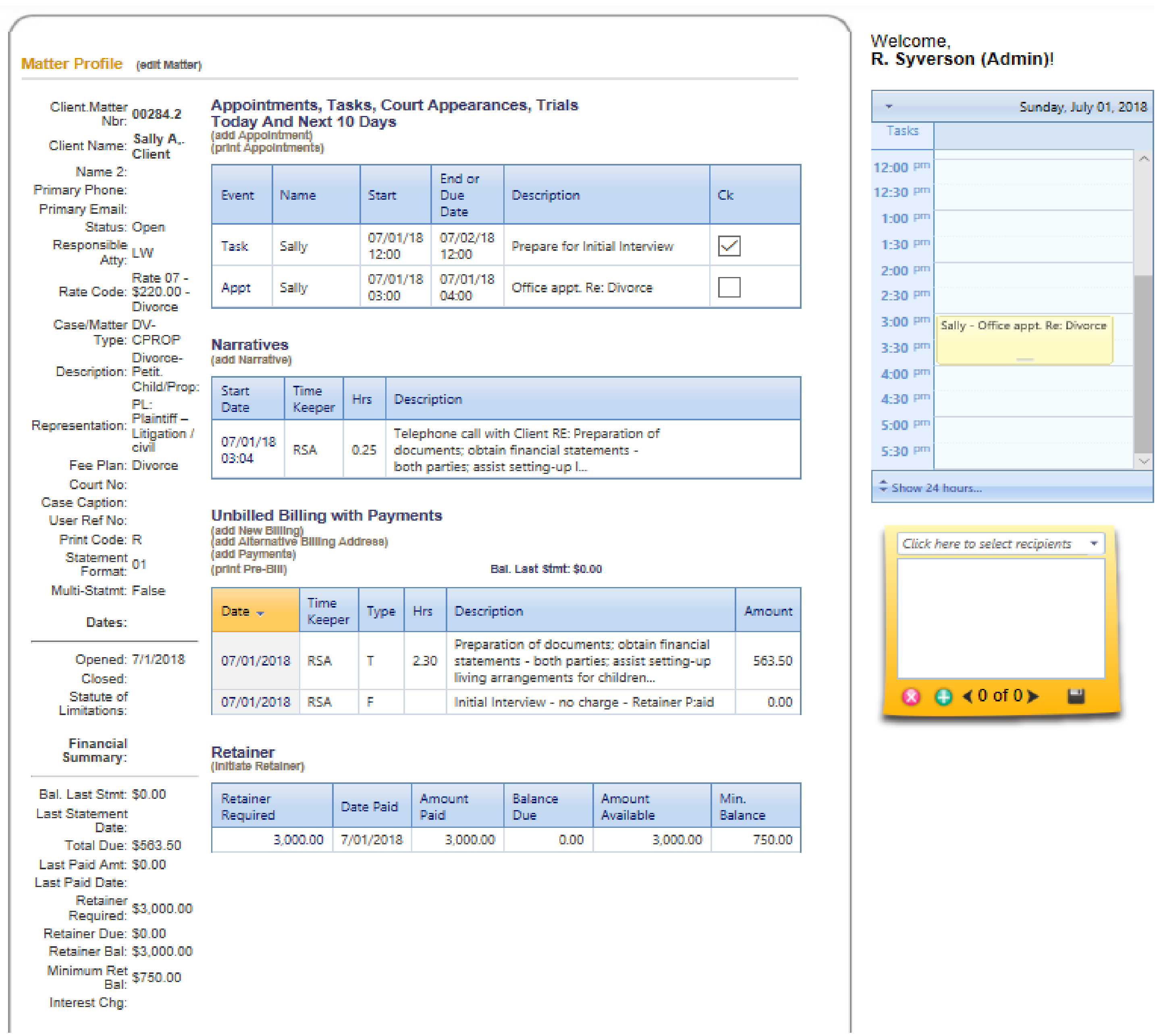
CompleteDATA Law Office Management

How to setup Systems Codes
and the exceptional benefits they provide

Go to page 2, Table of Contents and Press Ctrl + F
Type "Page #" you wish to view



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CompleteDATA Corp

CompleteDATA is an Minnesota Corporation marketing Web-based ***CompleteDATA Cloud™.*** through OnLineLawFirmManagement.com. A Practice Management Software" for law firms, The powerful new version meets the ever-increasing needs required to maintain profitability in a law firm. The "complete" part of the product name indicates that no other software is required to manage a law practice. This translates into large savings. Updates and backups are no longer an issue. ***CompleteDATA Cloud*** is in a continuous backup state at all times and updates are done while you sleep. **CompleteDATA has provided software for law firms for 30 years. Some firms are in their 22nd year using the Server version.**

Included modules are: Conflict of Interest checking, Case Management, Docketing, Calendar & task Management, Time and Billing, ***AutoBILL™***, ***ClientNarrative™*** **Tracks client procurement costs** and the number of **new clients obtained** with cash flow as the result of each marketing venue. You may add modules: (1) "Time Management" (the ability to see who, what, when and where a timekeeper is spending time), (2) View Profitability Centers (by case type), and (3) Advanced Business Management.

Product Overview

Billing & Time Billing: Most time billing may be done with *AutoBILL™.* It automatically bills telephone calls to or from, office appointments, court appointments, and a host of other automatic billings. And manual billing uses drop-in text some default and also created by the firm to eliminate typing and provide consistency.

Calendar & Task Management: The calendar categorizes type of event and ties the event to a client matter, attorney, and/or a group. It also "polls" everyone's calendar making it easier to set up an office meeting. All entries in a lawyer's calendar instantly update a **client-matter calendar.**

Statute of Limitations Calculator: Automatically creates four reminders as well as prominently posting the SOL date on the client matter screen.

The calendar updates the **Work In Progress R**eport. Anything scheduled and not billed is flagged, making it possible for the average office of 10 lawyers to recover up to $300,000.00 in lost billings the first year. A single practitioner could recover as much as $30,000 per year.

Client Management & Conflict Checking: All persons or entities associated with a client matter: witnesses, experts, other-parties, opposing counsel, partners in a partnership, officers of a corporation, all co-counsel (and their participation in any matter), and all heirs to an estate, etc. These lists are also checked for conflicts upon entry of a new client. The matter, case number, and notes are displayed if a potential conflict is found. If a direct conflict is found the system displays the conflicting information and the user is not allowed to continue the entry.

Document Management: Store any document on the web to make available to any authorized user. This may include emails, word processing, Spreadsheets, PDF's, and images. The document is placed in a client-matter folder for easy access. Edit any word processing or spreadsheet on the web. Tracks author and who did last edit. It includes check-in and check-out data, I.E., who has it now, and when the document is finalized and printed. It allows role-back to previous versions.

For new users that wish to upload documents yourself, you may upload about 30-100 documents at a time. (Microsoft and/or server limitations apply). Then you can tag each upload with a specific tag or tags. Please ask for help if you find this difficult. We suggest you organize your upload by matter and document category and start with a smaller number to begin with.

CompleteDATA Cloud

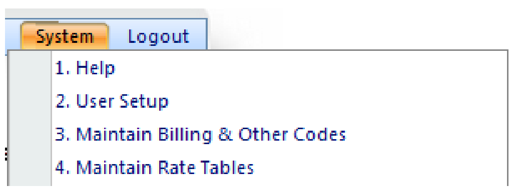
A legal Solutions Provider

Marketed by: CompleteDATA Cloud , OnLineLegalSoftware.com, IntegratedLegalSoftware.com and CDC Version 1.1.9 for CompleteLAW Practice Management in the Cloud

Systems Setup

Upon opening CompleteDATA Cloud for the first time you will discover that all authorized users are already installed. Check your email for user login and passwords. It is very important that you do Systems Setup routines #3 and #4 found on the Main Menu; **System,** before you begin using the program.

The Systems Menu:



Familiarize your self with the Help section. It also includes the information found in this Quick Start Manual.

User Setup: Use this section to add or modify user information.

Maintain Billing and other codes Section: This section includes 'automated selections' for the following: 1) Calendar events and Tasks, 2) Billing Categories and Billing codes for each, including default pricing for flat rate (task-based billing and cost billing)
3) Case/Matter Categories and matter codes with associated drop-in text, 4) Fee Plan setup, 5) Marketing Sources (advertising costs and revenue reports), 6) Automated text selection setup for ***Narrative/AutoBILL™.***

Maintain Rate Tables: When the software is activated for you every Timekeeper is assigned a rate code based on the information supplied by your office. You may assign up to 20 hourly rates for each user, based on type of matter. This is explained in the Rate-Code section.

Utilities: This Section is under development – Use by Systems Administrator

Firm Statement Setup – Select layout for the Header on your Invoice/Statement.

Edit Financial Data: This section is under development. It allows the accounting people to make corrections where an error was made by improper entry of data. This is usually used by accounting or billing, and is not usually used by lawyers and staff. (Note: A sole-practitioner has all options)

Section One - User Roles

A Single User System presents one Menu and the user fills all rolls.

A multi-user system presents menus and user screen forms based on job requirements and the need to know. This allows users access to the areas of the program they most often use easily and quickly.

Lawyers, for example, do not need to view accounting screen and generate most reports. On the other hand, staff persons do not need to see profit and loss statements, or lawyers' income distribution reports.

Multi-Office Setup: The Multi-Office setup is initiated by CompleteDATA. Be sure and check spelling, and administrator for each office, if the setup required separate administrators. Otherwise, the home office Admin will administer all offices

When adding Users to a Multi-Office environment, be sure and select the office the user works in from the Office-Drop-Down

The User Role is assigned by the systems administrator. Please assign a Role to each user and insert the person's name and other required information when asked. We recommended the administrator install the User password as well.

You may print a report at any time to verify your entries. An Edit Box is displayed listing all users. Select one to edit.

Passwords: Passwords are required.

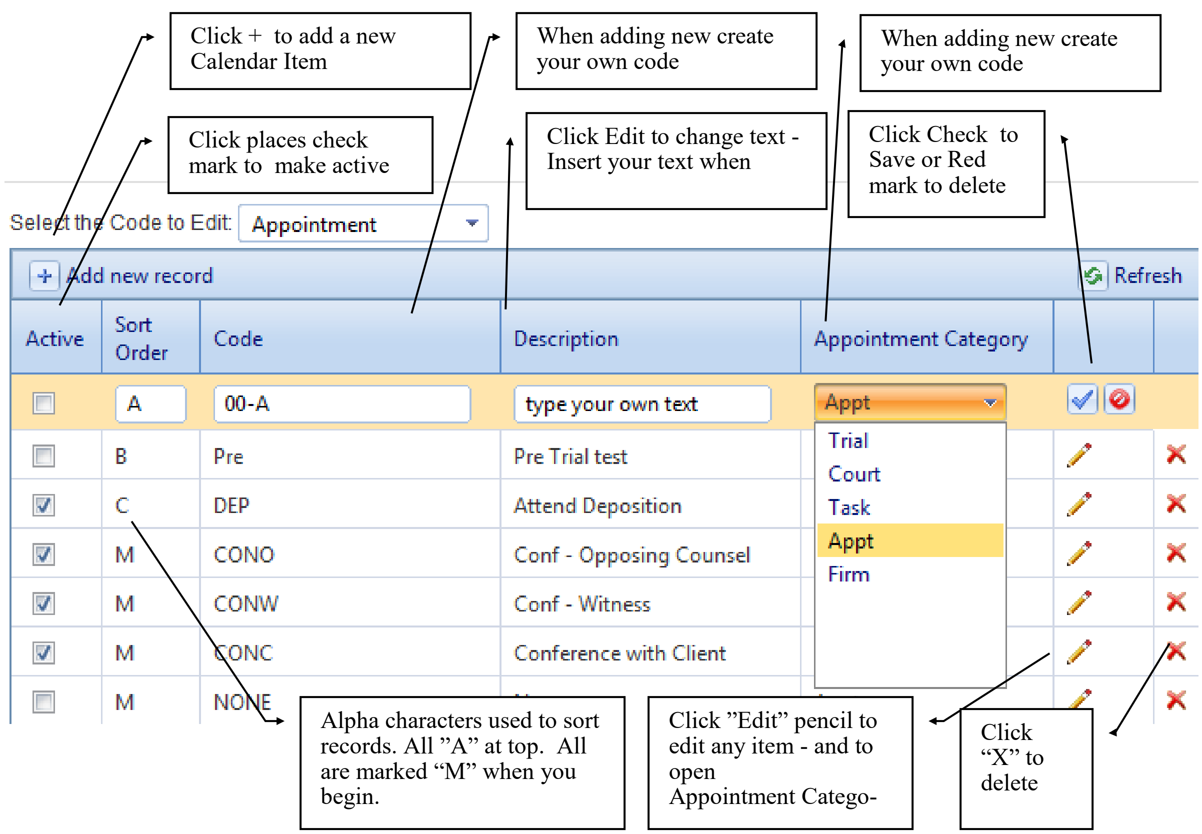
Please assign someone to keep a list of passwords in a safe place. This person should always be informed when a user changes his or her password. Otherwise, a user or administrator may not gain access to that person's "labeled" information if the password is forgotten or the person leaves your employ.

If a password is lost, we can go on-line and restore the user. You should change the "systems" password after we have completed the job to insure your systems integrity will not be compromised.

Explanation of columns

Active, Sort Order, Code, Description, Edit, Save and Delete apply to all setup routines

Here we use the Calendar setup



The calendar system comes with 34 calendar items in five categories described above.
The categories are color coded:

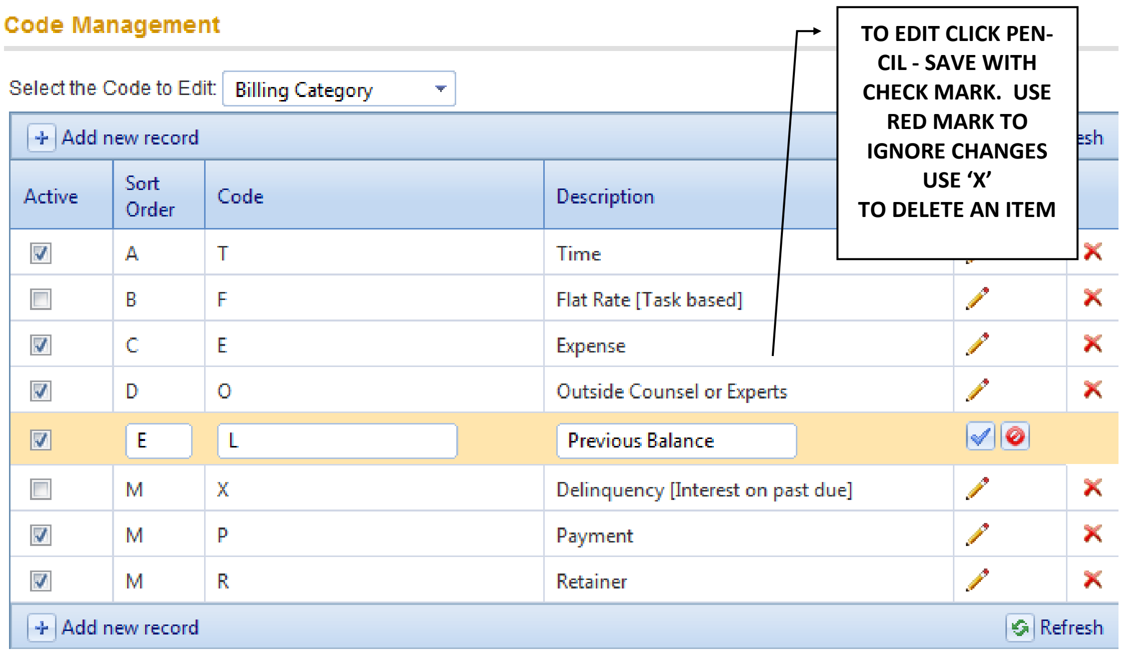
Trial	Blue
Court Appearance	Green
Task	Orange
Appointment	Beige
Firm	Light Red

You may disable any of them by removing the check mark in column 1.

Setup & Quick Start Guide

The following setup routines should to be completed before you begin using the system.

1. Enter User Information: (Page 8)
   Be sure and Insert user Initials for "short name".
   The short name is used to identify the user in billing, calendar & tasks, reports, etc.
2. Enter Hourly rates for all timekeepers (pages 8 & 9)
   Up to 20 hourly rates may be inserted for each timekeeper and labeled with a code and descrip-



   tion. For example: rate code "09" assigns an hourly rate of zero per hour and is used for contingency matters. Useful in tracking hours of all timekeepers on any matter without charging time.
   You may assign hourly rates for Family Law, Business Law, etc.
   An hourly rate codes is assigned to a matter when the matter is entered. Each persons hourly rate established for that Rate Code is used.
3. General Billing descriptions and codes are already installed.
   See pages ___ & ___ in this manual on how to add and edit.

4. There are four billing categories:

   T - Time Billing
   F - Flat rate (task based billing)
   E - Expenses: Internally generated and external (vendors)
   O - Experts and outside counsel (1099 entries)

   Expense Examples:
   Enter filing fees specific to each court and name the court. This insures consistency, and prevents numeric errors.

   Sprint County Clerk of Court - Filing Fee $350.00

User Setup

Before you begin using the software follow the guidelines in this document, to make sure all systems codes have been set-up properly. The Administrator, or a sole-practitioner, is pre-set on activation of the program to install the necessary codes.

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

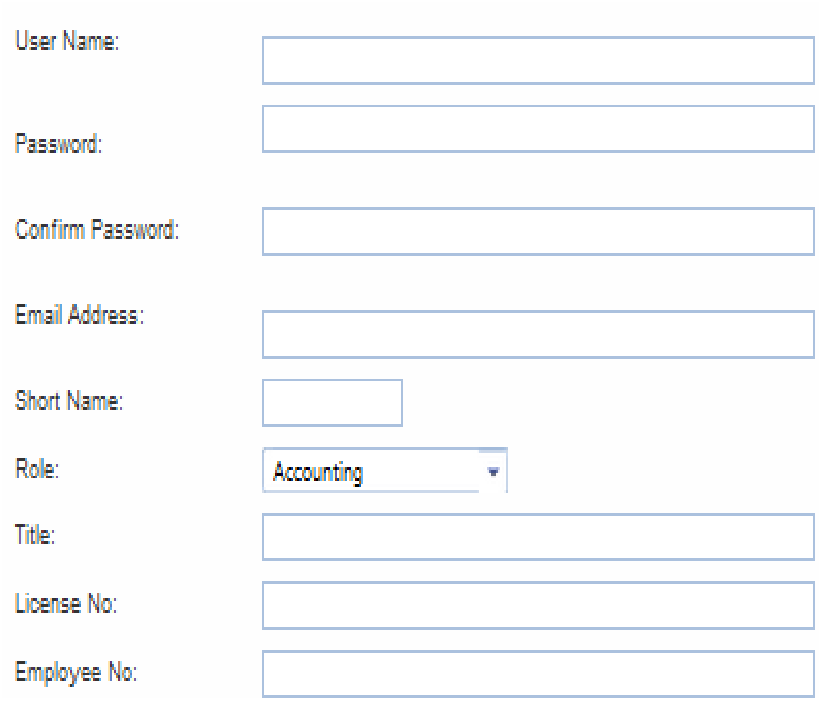
System #2 to add other users open ***CompleteDATA™*** and from the **Main Menu**

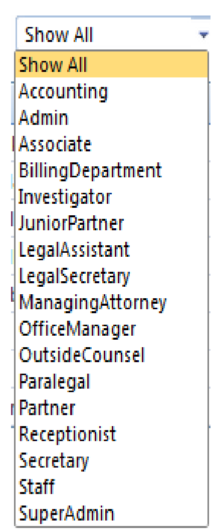
Click **[Add New]** button and insert requested information

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 add **Users Role. I.E., Partner, Managing Attorney, Associate, Secretary, Para Legal, etc. Select from drop-down menu displayed below. Verify that all information in correct: Click [Save]**

.

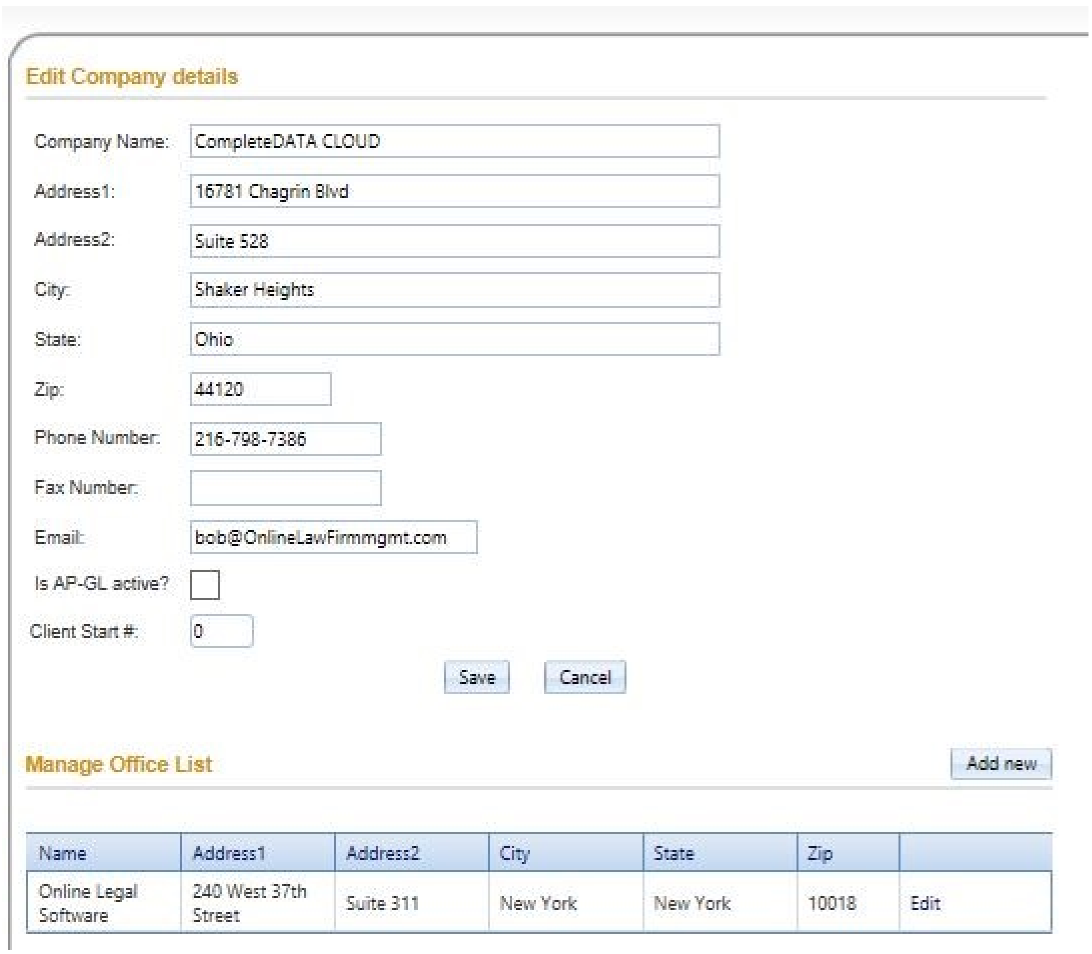




Firm Setup Information

Select [Systems] + 5 Firm setup from the Main Menu Bar.

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


Edit Company details

Company Name: CompleteDATA CLOUD

Address1: 16781 Chagrin Blvd

Address2: Suite 528

City: Shaker Heights

State: Ohio

Zip: 44120

Phone Number: 216-798-7386

Fax Number:

Email: bob@OnlineLawFirmmgmt.com

Is AP-GL active?

Client Start #: 0

Save Cancel

Manage Office List Add new

Name	Address1	Address2	City	State	Zip	
Online Legal Software	240 West 37th Street	Suite 311	New York	New York	10018	Edit

Firm Statement Setup & Letterhead

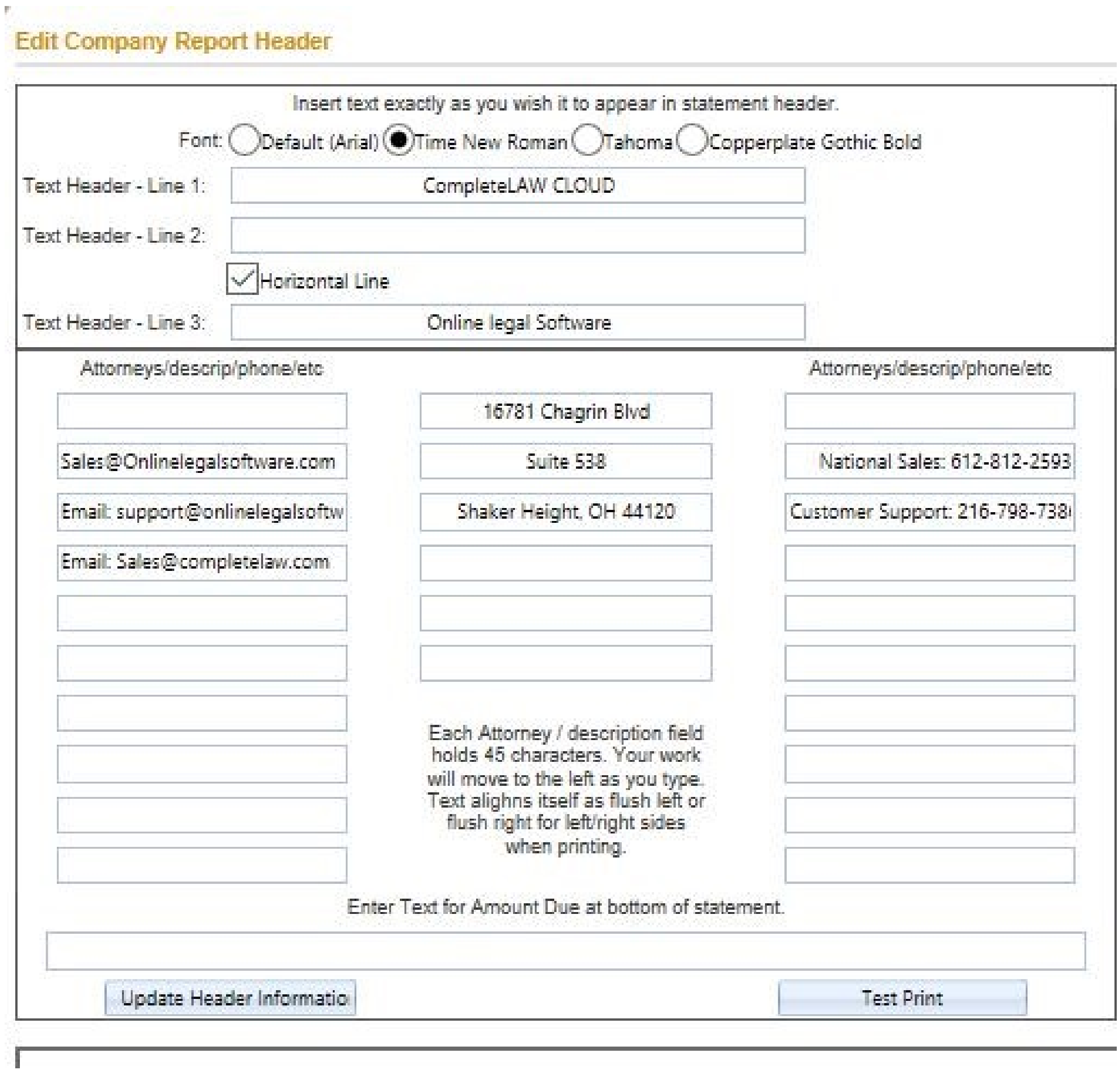
Select [Systems] + 6 Statement setup from the Main Menu Bar.

This will appear on your Invoice / Statements

Select:

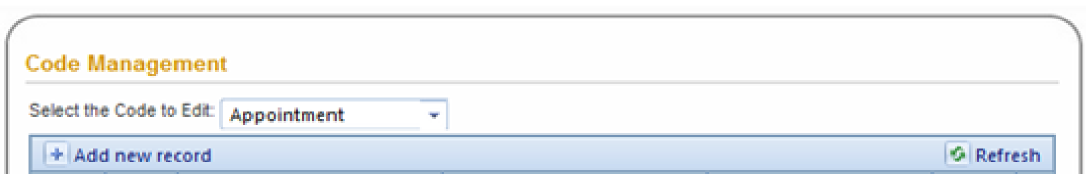
1. Font style
2. Header text—two lines
3. Horizontal line or not
4. Header text line 3
5. Insert attorneys, address, phone and email

View sample below



Code Management

Select #3Maintain Billing and Other Codes from the Main Menu -> System. These codes 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. (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 selec-tion form used to locate and change systems codes.

c. **Select the Code to Edit:** *(from drop-down menu)***.**

d. **See Page11 for Calendar Codes** *(Appointment is the first item in the list)***.**

The code categories are:

1. Case / Matter categories
2. Billing Categories
3. Billing Codes
4. Calendar & Task
5. Case / Matter codes
6. Fee Plans
7. Narrative Codes with drop-in text with (AutoBILL tm) when applicable.
8. Case / Matter status
9. Marketing Codes

Select #1: to begin. CompleteDATA Cloud provides a complete set of everything you need to begin working with client matters except individual hourly rates.

View hourly rate codes on page .

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

Rate tables & rate Codes

You may assign 20 or more hourly rate codes for each timekeeper. Please consult your User List and print out the User Codes you have installed.
Do not attempt to install clients until you have installed attorney rate codes.

Set up your areas of practice here. Then in next table assign hourly rates for timekeepers for each category established.
Click on Pencil to edit,. Click save button.

You may delete with the red **X**

Rate Table Management

Rate Codes:

Code	Description	Edit
Rate 01	Basic Hourly Rate	
Rate 02	Divorce	
Rate 03	Family Law	
Rate 04	Intellectual Property	
Rate 05	Probate	
Rate 06	Bankruptcy	
Rate 07	Social Security	
Rate 08	Corporate Law	
Rate 09	Contingency 0 / hour	
Rate 10	Rate 10	

Timekeeper Rate tables

Pick the User To Edit:

FIRST SELECT TIMEKEEPER TO EDIT

Code	Description	Rate	Edit
Rate 01	Basic Hourly Rate	$200.00	
Rate 02	Divorce	$0.00	
Rate 03	Family Law	$0.00	
Rate 04	Intellectual Property	$0.00	
Rate 05	Probate	$0.00	
Rate 06	Bankruptcy	$0.00	
Rate 07	Social Security	$0.00	
Rate 08	Corporate Law	$0.00	
Rate 09	Contingency 0 / hour	$0.00	
Rate 10	Rate 10	$0.00	

Enter the users rate codes and descriptions. For attorneys, these codes apply to;
1) "working attorney" or primary billing attorney or, 2) The attorney that originated the file and will be billing time on it. If an attorney is an originating attorney, insert this information in **client set-up. 3) The Working Attorney may be the same as originating. If you do not use these designations, always use working attorney field ONLY, during client setup**.

As described above, certain codes may have a default retainer requirement.

For contingent matters, set a rate-code to hourly rate code #9: 0.00. Always use this rate code for contingent files. This assures you of keeping track of all timekeepers time so you can do a Profitability Report to determine the profitability of contingent matters and certain flat-rate case types, such as Workers Compensation.

Percentage distribution. Use these fields to determine the percentage of fee income that will be assigned to an originating, primary and secondary attorney on client cases originated by him or her. (These fees may be in addition to time spent on these files by the originating attorney billing by the hour.)

Status Codes

Print the existing codes.

Code Management

Select the Code to Edit: Matter Status Code

+ Add new record | Refresh

Active	Sort Order	Description		
☑	M	Open	✎	✕
☑	M	Engaged	✎	✕
☑	M	Inquiry-Not Engaged	✎	✕
☑	M	Suspended Client File	✎	✕
☑	M	Closed	✎	✕
☑	M	Archived	✎	✕
☑	M	Pending Interrogatives	✎	✕
☑	M	Settle without predudice	✎	✕

+ Add new record | Refresh

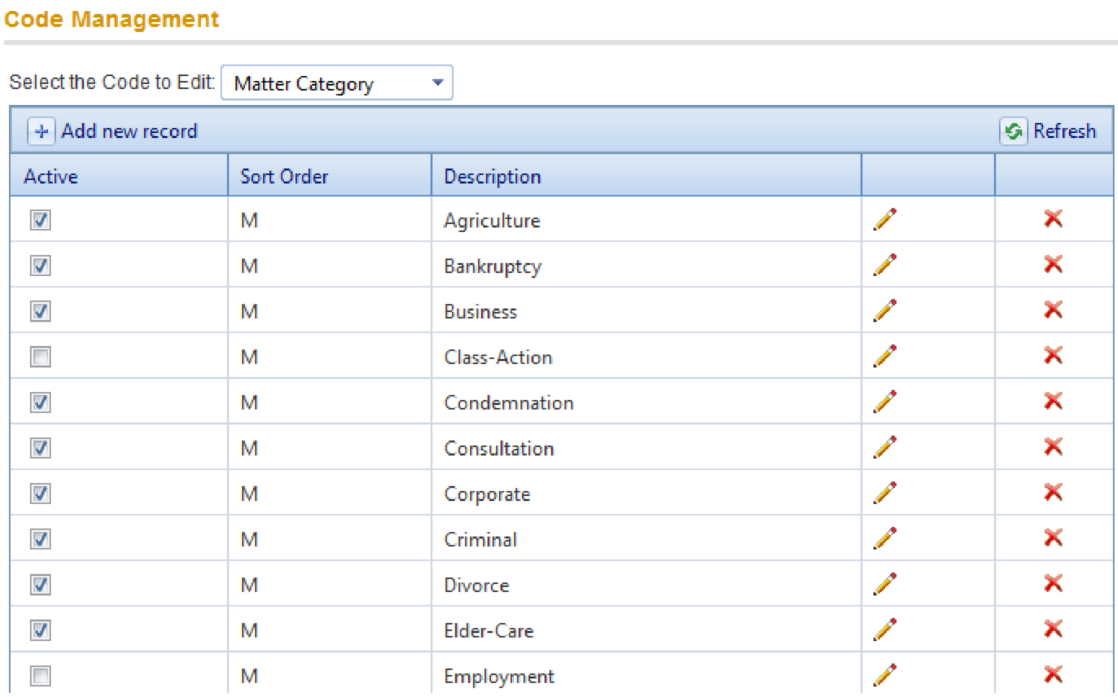
These codes allow you to print reports based on the current status of a case.
In addition, status codes allow you to organize client file.

You must retain the following codes.

Closed	Closed status leaves file in system for reopening at a later date. It includes closed file number and location of files in archives.
Open	Active case file
Suspended	Used for bad accounts
Inquiry	Used for intake of information, (potential divorce) or to be sure you have logged in information of a potential client regarding what was said. Record date and time of any phone conversations or correspondence regarding the matter. Provides a place to clearly state your position on whatever issue was raised by the potential client in ClientNarrative.

Other status codes are optional. However, a status must be used when setting up a client file. It may be changed as required as the case progresses.

Matter Category



Code Management

Select the Code to Edit: Matter Category

Add new record | Refresh

Active	Sort Order	Description		
☑	M	Agriculture		
☑	M	Bankruptcy		
☑	M	Business		
☐	M	Class-Action		
☑	M	Condemnation		
☑	M	Consultation		
☑	M	Corporate		
☑	M	Criminal		
☑	M	Divorce		
☑	M	Elder-Care		
☐	M	Employment		

There are 32 categories on two pages. Select page 2 to view other case / matter categories.

All categories are active when you first view these screens and all are marked with “M”.

1. Click in Active to **remove** the **check mark** for **deactivate** categories you will not use. A category may be made active again by checking it.
2. Set Sort Order “A” to “Z” “A “ sorts to top.
3. More than one category may contain the same alpha character

Case/Matter Codes

Code Management

Select the Code to Edit: Matter Code

Add new record | Refresh

Active	Sort Order	Code	Description	Matter Category		
☑	N	BK-11	Bankruptcy Chapter 11	Bankruptcy		
☐	N	BK-12	Bankruptcy Chapter 12	Bankruptcy		
☑	N	BK-13	Bankruptcy Chapter-13	Bankruptcy		
☑	N	BK-07	Bankruptcy-Chapter-07	Bankruptcy		
☑	N	BK-OTHER	Bankruptcy-Other	Bankruptcy		
☑	N	BK-POST	Post Bankruptcy Creditor Issues	Bankruptcy		
☑	Q	BU-COL	Collection Matters	Business		
☑	Q	BU-CONT	Contract Action	Business		
☑	Q	BU-DEC	Declaratory Judgment Action	Business		

Approximately 200 case / matter codes are available in 32 categories.

1. Case / Matter codes will not display here if you have removed the Category as described on page 14.
2. We recommend that you set sort order for Miscellaneous to **"A"** at the top . If a user fails to select a case / matter code - it is easy to change a Miscellaneous code to any other.
3. Case / Matter codes are used in Reports. Consequently:
    4. If you add additional codes please make use of the first two characters in describing your code. If you start an entirely new group - be consistent in creating the identifier.
    5. See examples above: "BK-" identifies Bankruptcy, "BU-" identifies Business.

Billing Codes

Code Management

Select the Code to Edit: Billing Code

+ Add new record   Refresh

Active	Sort Order	Code	Description	Billing Category
☑	M	INT	Interest Charge	Delinquency [Interest on past due]
☐	A	00-A	Type your own text below	Expense
☐	D	0BCFF	Clerk of the Bankruptcy Court filing fee	Expense
☐	E	00CLO	closing fees	Expense
☑	M	00ABS	abstracting fees	Expense
☑	M	00CER	certified copy	Expense
☑	M	00CCC	Certified copy charges	Expense
☐	M	00002	CKM Filing Fee	Expense
☐	M	0CCFF	Clerk of the Court Cuyahoga County filing fee	Expense
☑	M	0LN-D	Loan documentation	Flat Rate [Task based]
☑	M	0LN-M	Loan modification	Flat Rate [Task based]
☑	M	00004	Engineering specialist	Outside Counsel or Experts
☑	A	00-A	Type your own text below	Time
☑	M	00341	Attend creditors' meeting	Time
☑	M	00DEP	Attend deposition of	Time
☑	M	00CTH	Court appearance to attend hearing	Time
☑	M	00CTT	Court appearance to attend trial	Time
☑	M	0DRFT	Draft	Time
☑	M	000DA	Draft Answer to	Time

Billing code examples above in Alpha Sort Order. More than 100 are included. Use the same editing tools as described elsewhere in this guide. Mark most often used billing codes with Sort Order "A", then "B", etc. Leave "Type your Own Text" as an "A" so it appears at the top of the list. When selecting billing codes they are displayed in Sort Order A -Z .

Fee Plans

Code Management

Select the Code to Edit: Matter Fee Plan

+ Add new record | Refresh

Active	Sort Order	Description		
☐	A	General Billing - Hourly and Flat Rate		
☐	B	Hourly Billing - Retainer Required		
☐	C	Flat Fee / Task Based - With Time Tracker		
☐	D	Flat Fee / Task based - Retainer with Time Tracker		
☐	E	Contingent Lit% - TimeTracking Settlement		
☐	F	Contingent Lit% - Retainer/TimeTracker/Settlement		
☐	G	Hourly PrePaid - Discount Fee (activation req)		

+ Add new record | Refresh

Purpose:
Assign a fee plan to assure that your billing setup is accurate. For example, if you are opening a Personal Injury or other contingent matter you eliminate the often mistake of including an hourly rate.. Also, if a Retainer is required you are presented with the Retainer input form. The Client-Matter Rate-Table will present the required retainer for the type of matter you have opened.

If a Workers Comp case is entered -the proper forms are displayed for this type of matter as well.

Narrative/AutoBILL Codes

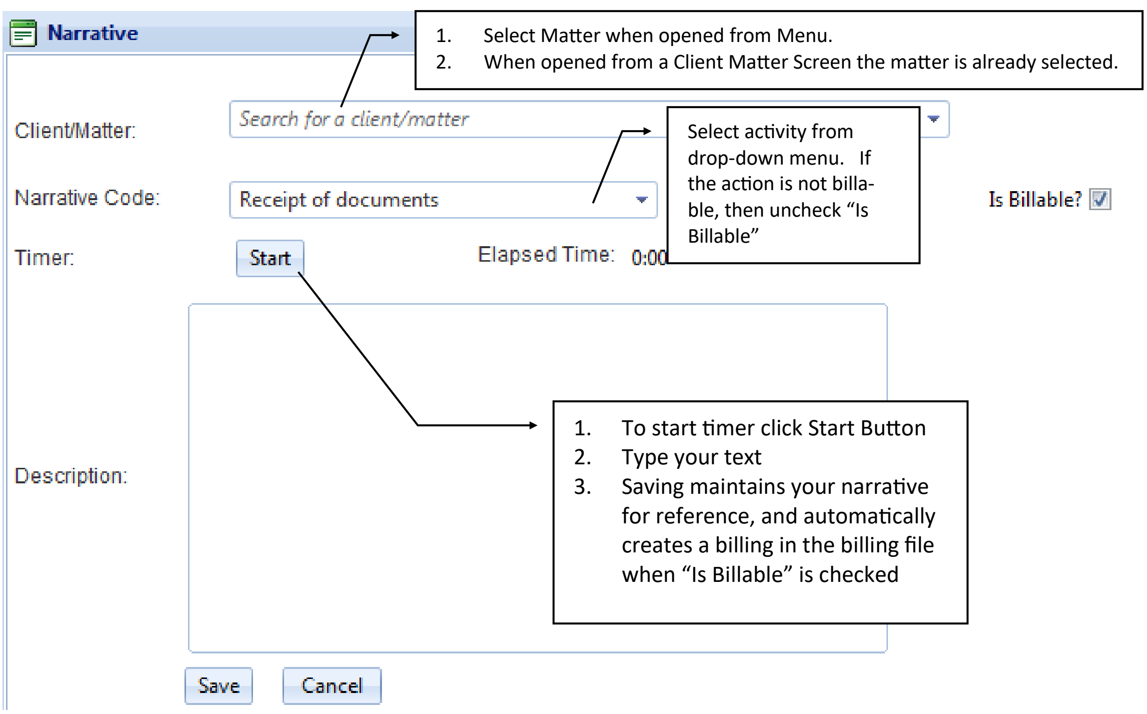
Code Management

Select the Code to Edit: Narrative Code

+ Add new record | Refresh

Active	Sort Order	Description		
☐	A	Type your own text		
☑	M	Receipt of documents		
☑	M	Phone to/from Court		
☑	M	Phone from client re: status of case		
☑	M	Notes to File		

Use Narrative/AutoBILL to record notes and for automatic time billing.
Create or edit codes in form found above.
The form below is available to you from the Attorney Dashboard and from the Client-Matter Page.



Marketing Source

Select the Code to Edit: Marketing Source

+ Add new record | Refresh

Active	Sort Order	Description		
☐	A	Not Known	✎	✖
☑	M	Yellow Pages	✎	✖
☑	M	KXRA Radio	✎	✖
☑	M	Existing Client	✎	✖
☑	M	Referral of..	✎	✖

+ Add new record | Refresh

Add / Edit Marketing source codes above. Your intake forms have a question: "**How did you hear about us?"** The CompleteDATA Cloud system then compiles the information found for each client matter that was obtained from your Marketing Initiatives in the **Marketing Report** shown below. It automatically does a cost-benefit displaying costs and revenue.

MARKETING SOURCES & REVENUE (CR-19)

Marketing / advertising codes and descriptions. Report includes number of cases opened this year for each marketing type and total revenue generated year-to-date

Page: 1
Date: 07/03/2012
Time: 15:50:21

No.	Code	Description of Publication / Source	Number of New Clients	New Revenue	Ad Start Date	Ad End Date	Advertising Cost
1	Not Kn	Not Known	0	0.00	/ /	/ /	0.00
2	YP1	YellowPages	0	0.00	/ /	/ /	0.00
3	MH	Martindale-Hubbell	0	0.00	/ /	/ /	0.00
4	LAWREF	Lawyer Referral Service	0	0.00	/ /	/ /	0.00
5	REFER	Referral of..	0	0.00	/ /	/ /	0.00

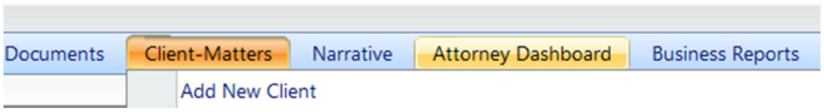
Number of New Cases: 0

Generated Revenue: 0.00 **Advertising Costs:** 0.00

Section Three

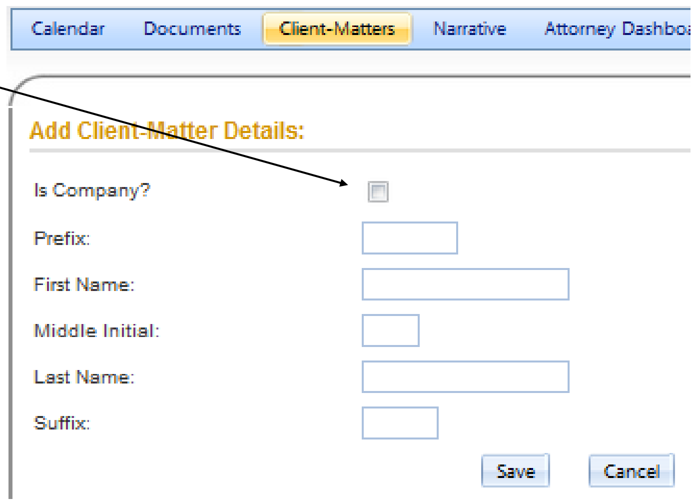
Installing a new client-matter

1. Select Client-Matters add New Matter



2. Select Company **or leave blank for** and Individual

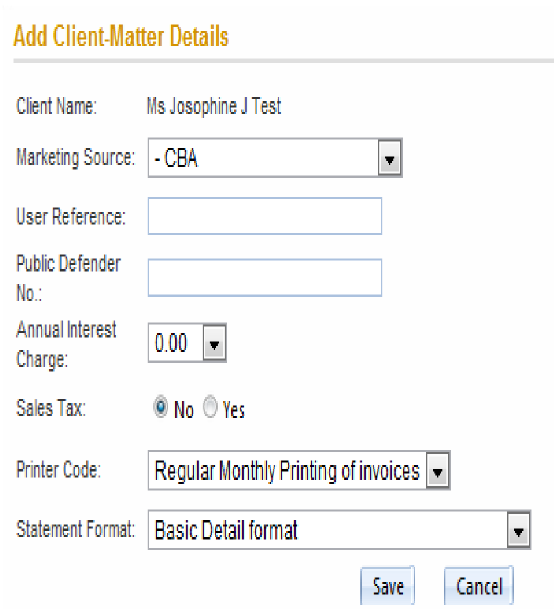
If the client is an entity such as a corporation, partnership or non-profit, please check this box to change name-fields from an individual to a entity to allow for additional space in which to insert long names.



After inserting a name the system does a conflict check. Click <Save> to activate 'Conflict Checking'

It searches all files; (opens, closed and deleted) for any name that may be associated with a contested matter. It also searches for officers in a corporation or partners in a partnership, and all persons attached to a contested matter as 'Other Parties' and those found in the "Relationship Management" section.

1. If a conflict is found, it will be displayed, showing the conflict, file number, date opened, and responsible attorney. You are not allowed to continue.
2. If a near conflict is found 'near-names' will be displayed. If no conflict exists, you may proceed. Ask for assistance from the lawyer associated with the suspected conflict file if you believe a conflict may exist.
3. If no conflict exists the entry is continued without interruption.



Install new client continued

Select:

Marketing Source - (How did the client find you? CompleteDATA reports on your advertising dollars and where you are getting the best results. *(See page _____ for how to do that)*

Insert your Reference No, if used.

If a public defender client – insert state code

Insert Annual Interest charge (this may be done later – however, your Representation Agreement must contain proper language allowing you to charge a finance fee for late payments)

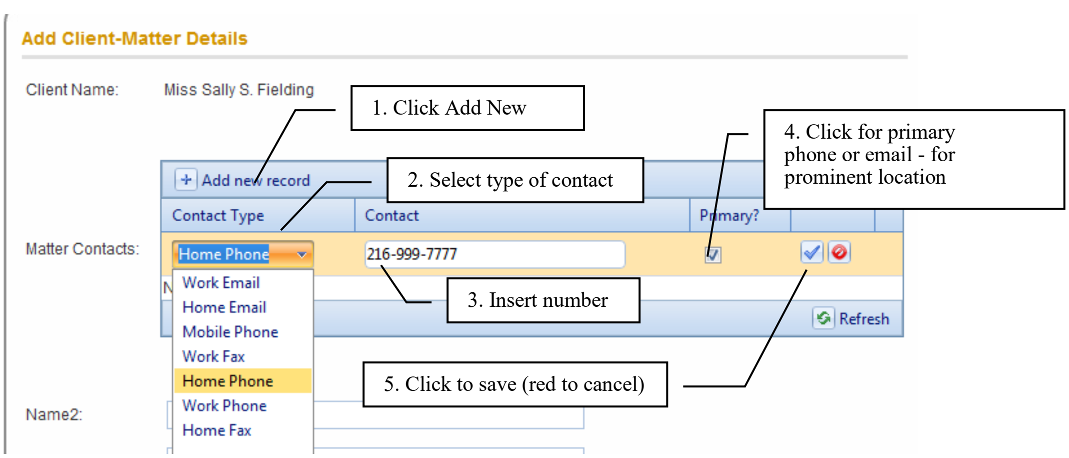
Select Sales tax – (South Dakota)

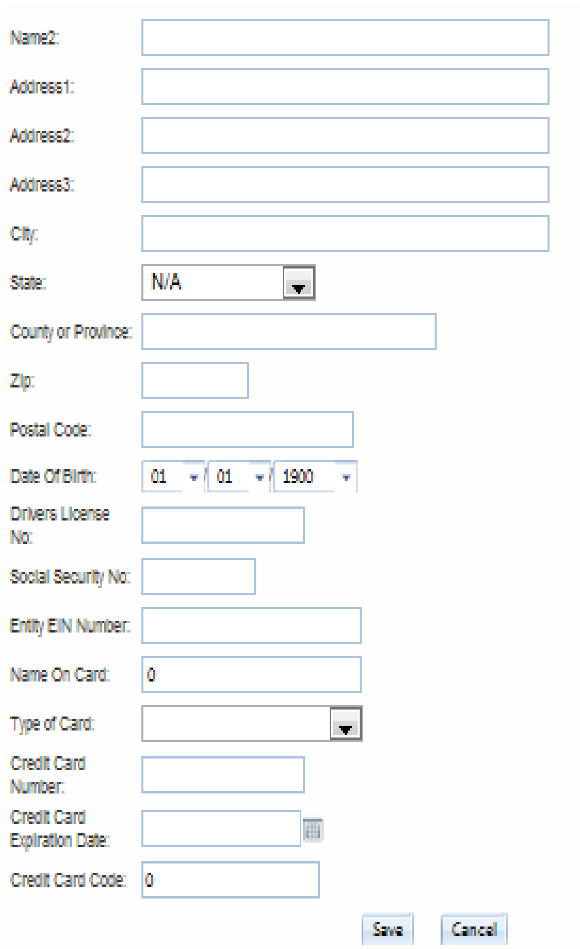
Select Invoice/Statement Format from 10 choice**:** (when an invoice should be printed.)

<Save> moves you to next page

Client Demographics & Other Party

Insert contact info: telephones, e-mails, texting, etc. There is no limit for home or business.





New client setup (last screen)

Add Second name if required

Add Address

The program uses "County" in reports and document preparation

Add other client information

Social Security

EIN Number

Credit Card Information

<Save>

You are done and Client-Matter is displayed in Matter Page

Section Four

Adding a Matter to an Existing Client

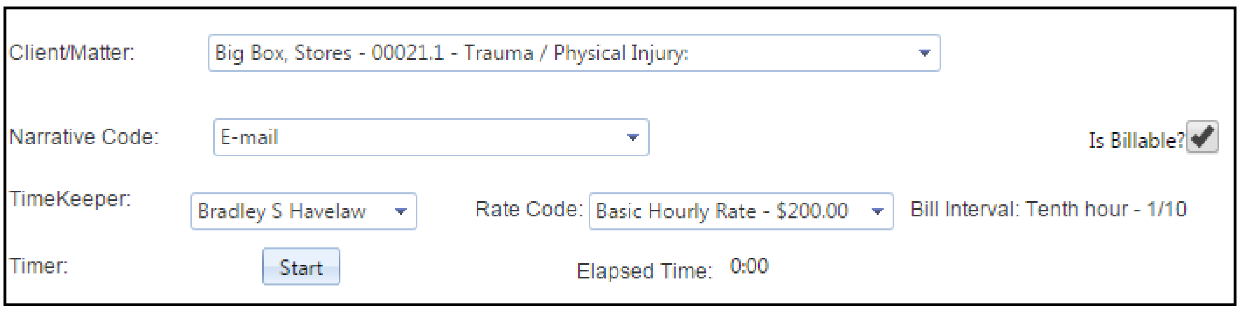
1. **Go to the Main Menu - click on selection: Client-Matters**
2. **Insert client name in look-up—click Hour-glass**
3. **When client comes up look next to Matter List—click Add Matter**

Client #	Client Name	Ref No.	Status	Opened Date	Amount Due	Atty-Case	Description
00204.1	Laing Robert		Open	02/18/2015	$0.00	PI-AUTO	Automobile Injury:
00220.1	Adair Susan		Open	03/09/2015	$0.00	MISC	
00221.1	Adcox Bob		Open	03/10/2015	$0.00	MISC	
00234.1	Banks Jerry		Open	05/18/2015	$82.50	TRIAL	Trial period:
00276.1	Barnes & Thornburg LLP		Open	08/18/2015	$0.00	PROSPECT	
00256.1	Bellamy Gretchen		Open	08/18/2015	$200.00	TRIAL	Trial Period:
00196.1	Berkowitz David		Open	02/10/2015	$0.00	CUSTOMER	Current - 1A, 1NA
00157.1	Bevan & Associates		Open	11/18/2014	$0.00	DEMO'D	Demo'd:
00238.1	Bidzinski Zenon J.		Open	05/18/2015	$0.00	TRIAL	Trial period:
00201.1	Blanton Laurie Ms		Open	02/18/2015	$0.00	DEMO'D	Demo'd:
00248.1	Bolek Cathy		Open	07/09/2015	$0.00	PROSPECT	
00278.1	Bonezzi, Switzer, Polito & Hupp, Co., LPA		Open	08/20/2015	$0.00	PROSPECT	Prospective Customer:
00111.1	Booth Unes		Open	07/31/2013	$49.00	TRIAL	Trial period:
00241.1	Bradsky Law		Open	05/18/2015	$0.00	TRIAL	Trial period:
00088.1	Brennan Michael		Open	05/22/2013	$50.00	CUSTOMER	Current
00064.1	Brown Ken		Open A	02/22/2013	$0.00	CUSTOMER	Paying customer:
00222.1	Butler Ben		Open	03/16/2015	$0.00	MISC	
00224.1	Byrnes David		Open	05/18/2015	$0.00	TRIAL	Trial period:
00245.1	Calhoun, Kademenos & Childress		Open	06/25/2015	$0.00	PROSPECT	Prospective customer:
00228.1	Calhoun, Kademenos & Childress		Open	05/18/2015	$0.00	TRIAL	Trial period:

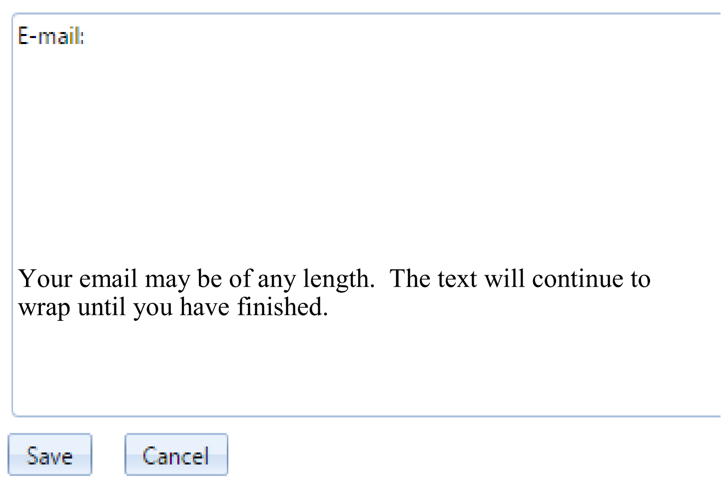
Send an Email from Narrative Selection on Main Menu or from within a Client Matter

Primary purposes:

1. **Allows an email to be created from** (1) within a client matter, or (2) from the Narrative on the Main Menu bar. It will bill time at the normal hourly rate selected for the matter and the timekeeper in one of three ways.
2. The Narrative/AutoBILL system allows for automated 1/10th, 1/4th minimums, and real time billing. When a matter is setup, these parameters are established.



3. A user may remove the checkmark “Is Billable” if the email is not to be billed. A Narrative will be created, however, but not the billing. This allows a record of the action to be stored in the systems Narrative of events.



When selecting Narrative from the Main Menu Bar the Email System Displays the following billing setup:

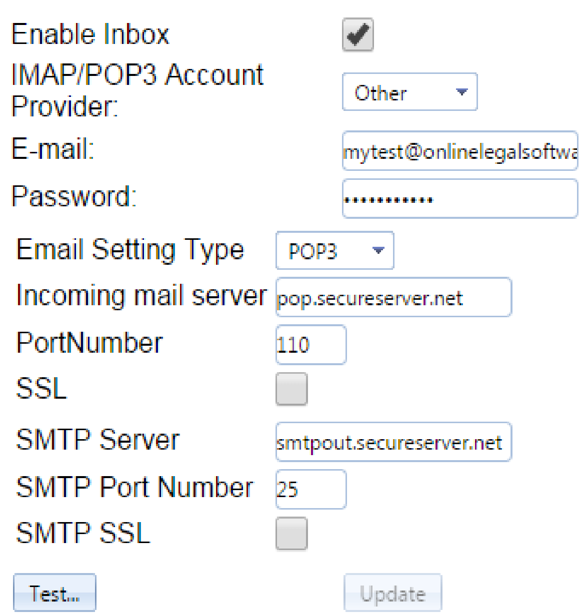
1. Select Client-Matter from drop-down
2. Select Narrative code “Email” Select Timekeeper (Selection displays your user Verify billing rate Code/select different from Drop Down
3. The clock begins to track time
4. Click <Start>
5. If interrupted, click <Pause>. You may select another. Click <Pause> again to restart
6. **Write email and click <Save>**

Email Management

1. If you are doing a 45-day trial, we suggest you use a temporary email address which we will provide. When you decide to keep the software then you should replace the temporary email address with the email address of your choice.

The Email System is found from Main Menu Bar —> Systems #10 Inbox Setup
It includes the following:

1. Email Setup, much like Internet Explorer or Outlook. **It also includes an Enable Inbox**. Uncheck that to disable the Email System.
2. Test cycle to assure proper setup. If you don't have the knowledge to do this, please ask your office IT or administrator for help.
3. Once it is setup, you will receive a test email indicating that it works, and a test email is also



a. Enable with chk mark, disable chk mark double click again to remove.
b. Select type of account
c. Insert email address
d. Insert password
e. Select setting type
f. Incoming mail server
g. Port number
h. SSL
i. SMTP Server
j. SMTP Port Number
k. SMTP SSl
l. Click <Test>
m. When test is successful, click <Update>

sent to one of your accounts to verify that sending also works as designed.

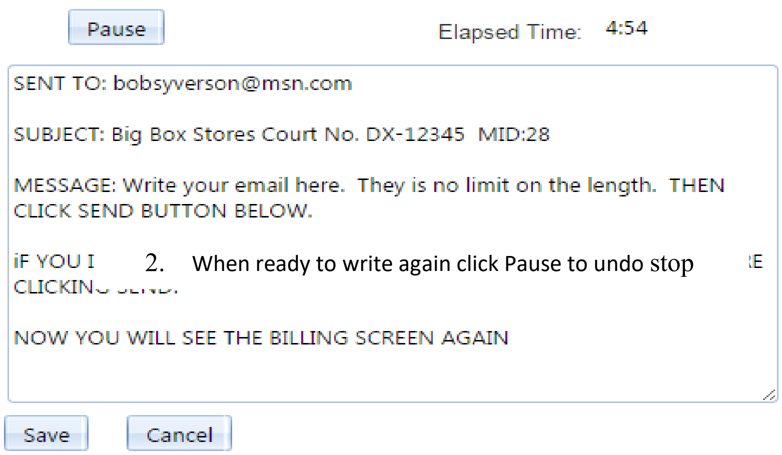
4. When you have decided to keep the program, the primary benefits of this system will be activated. They are described on the next pages.

Overview of Email Management:

Two primary purposes:

1. Allow an email to be created from within a client matter

The Email System:



a. The original billing screen reappears

b. Text about the email will drop in and you can add more text if you like

c. Click save and the email is sent, the billing is written, and the Narrative is updated.

Write Email. If interrupted, click Pause Button to stop clock. Click again to resume.

2. Second Purpose: To save emails in the client-matter folder so retrieval is easy.

The email is saved in two places. (1) In the client-matter file, and in (2) the Inbox.

a. Open client matter and scroll to bottom of screen. There you will find all emails associated with this matter.

b. The client-matter number identifies the returning email and places it in both folders as well. As long as the client-matter number plus the client name is used by others connected with the file, the received email is placed in the client-matter folder. If not, and the client name is used in the email, it can be moved from the Inbox to the client matter easily.

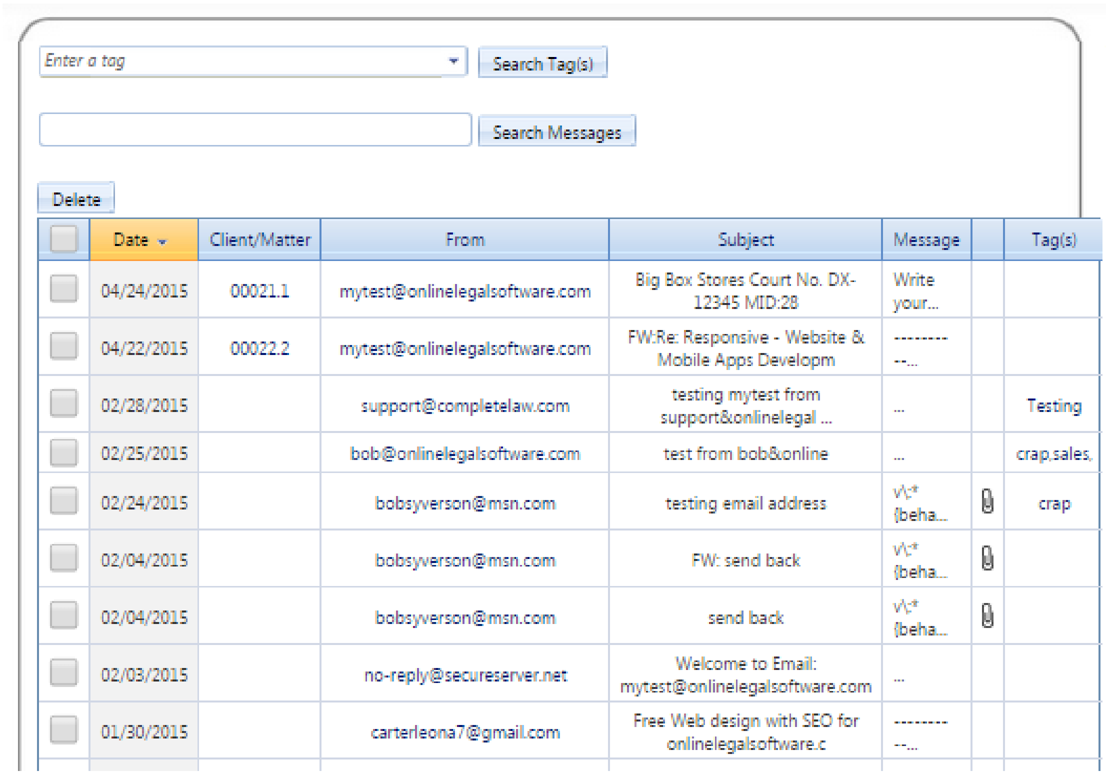
c. See the next page to view features of the Inbox. This is the first item at the left edge of the Main Menu Bar.

d. There you will discover how to tag emails.

Working with the Inbox :

4. Fourth Purpose: Open, Delete, Organize by date, from, subject, Author, tag,

A. Allow user to apply tags to emails and to delete unwanted emails


Enter a tag
Search Tag(s)
Search Messages
Delete

	Date	Client/Matter	From	Subject	Message		Tag(s)
	04/24/2015	00021.1	mytest@onlinelegalsoftware.com	Big Box Stores Court No. DX-12345 MID:28	Write your...		
	04/22/2015	00022.2	mytest@onlinelegalsoftware.com	FW:Re: Responsive - Website & Mobile Apps Developm	--------...		
	02/28/2015		support@completelaw.com	testing mytest from support&onlinelegal ...	...		Testing
	02/25/2015		bob@onlinelegalsoftware.com	test from bob&online	...		crap,sales,
	02/24/2015		bobsyverson@msn.com	testing email address	v\:* {beha...		crap
	02/04/2015		bobsyverson@msn.com	FW: send back	v\:* {beha...		
	02/04/2015		bobsyverson@msn.com	send back	v\:* {beha...		
	02/03/2015		no-reply@secureserver.net	Welcome to Email: mytest@onlinelegalsoftware.com	...		
	01/30/2015		carterleona7@gmail.com	Free Web design with SEO for onlinelegalsoftware.c	--------...		

Columns

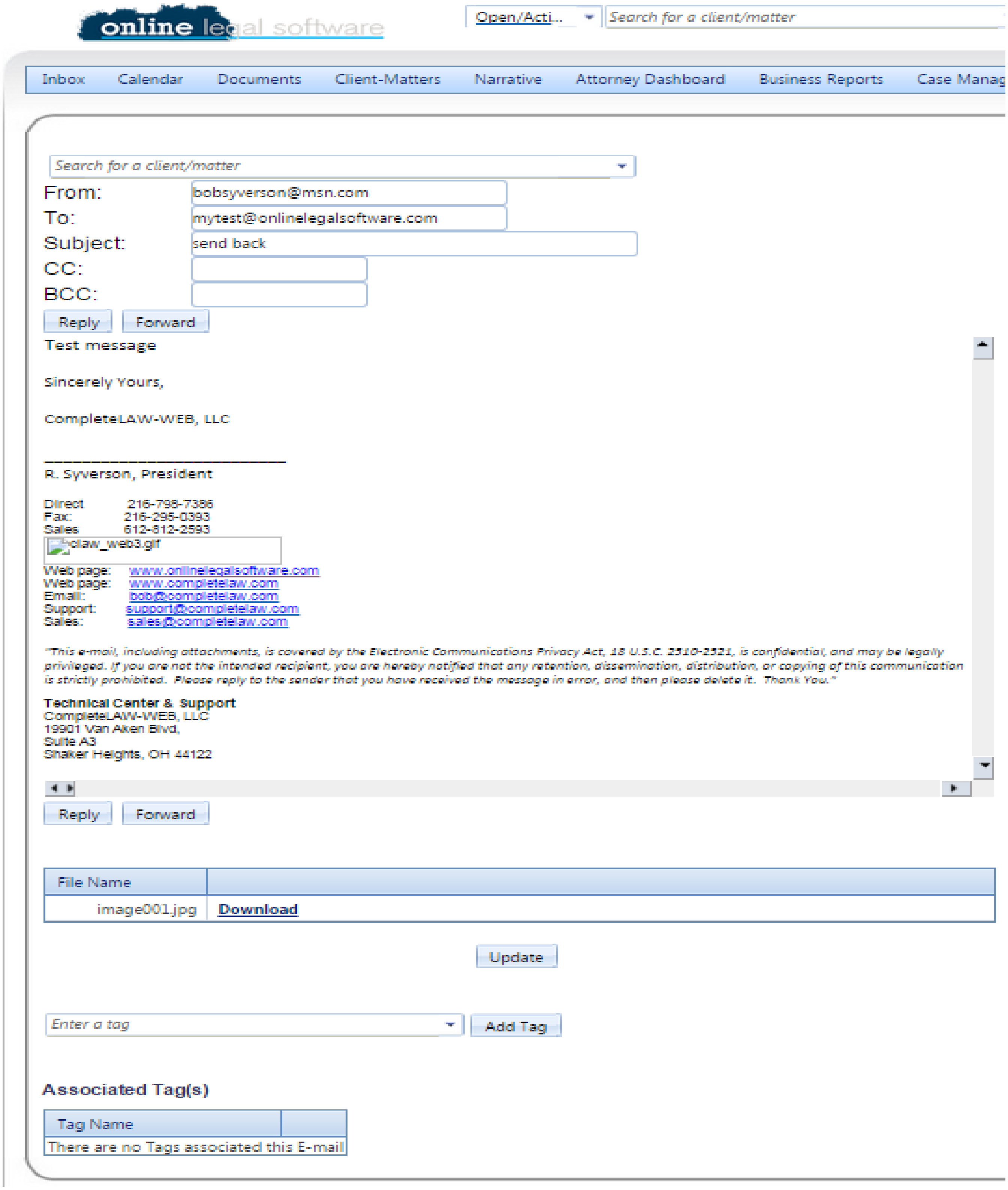
1: **Click Search tag(s) after entering the tag you wish to look for. All emails with that tag will appear together.**

2: **Click in box to get check mark**

3: **Click as many as you wish to delete. Then press Delete button at top. (Note, if they do not disappear, your browser still thinks there are there. Press Ctrl+F5 to refresh screen.**

4: **Click any column header to sort on that column.**

Working with the Inbox :



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