LAW

QUICK GUIDE

1. CASES AND PROJECTS 3

Add Case/Project..... 3
Edit or Update Case/Project..... 4
Add or Update Court Notes..... 5
Add or Update Court Processes..... 6
Scanned Documents..... 7
Case/Project Report..... 7

2. CLIENTS..... 8

Add Client Info..... 8
Edit or Update Client Info..... 9

3. STAFF..... 10

Add Staff Info..... 10
Edit or Update Staff Info..... 10

4. TASKS AND APPOINTMENTS..... 12

Add Appointment/Task..... 12
Edit or Update Appointment/Task..... 14
Change Appointment/Task status..... 15
Delete Appointment/Task..... 16

5. ACCOUNTS..... 17

Billing..... 17
Logging..... 18
Payments..... 19
Edit Billing..... 20
Edit Logging..... 21
Reverse Payment..... 22
Delete Billing..... 23
Delete Logging..... 24

1. CASES AND PROJECTS

Add Case/Project.

Click Cases/Projects > Add [Fig 1.1] or click the New Case/Project icon [Fig 1.2].

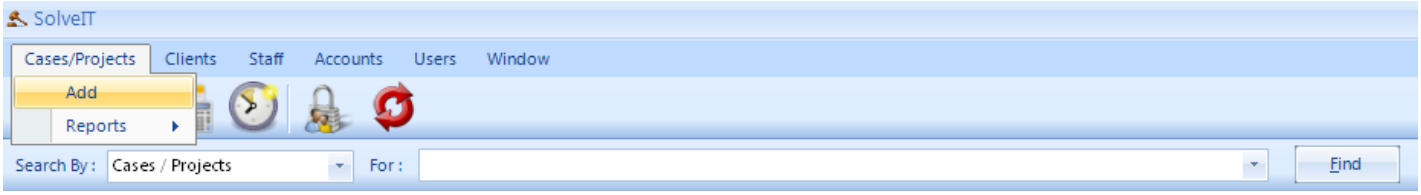


Fig 1.1

Fig 1.2

Fill in the relevant fields and click Save [Fig 1.3]. Use the up/down button located at the top right corner of each section to show/hide a particular section. The error warning denotes a required field.

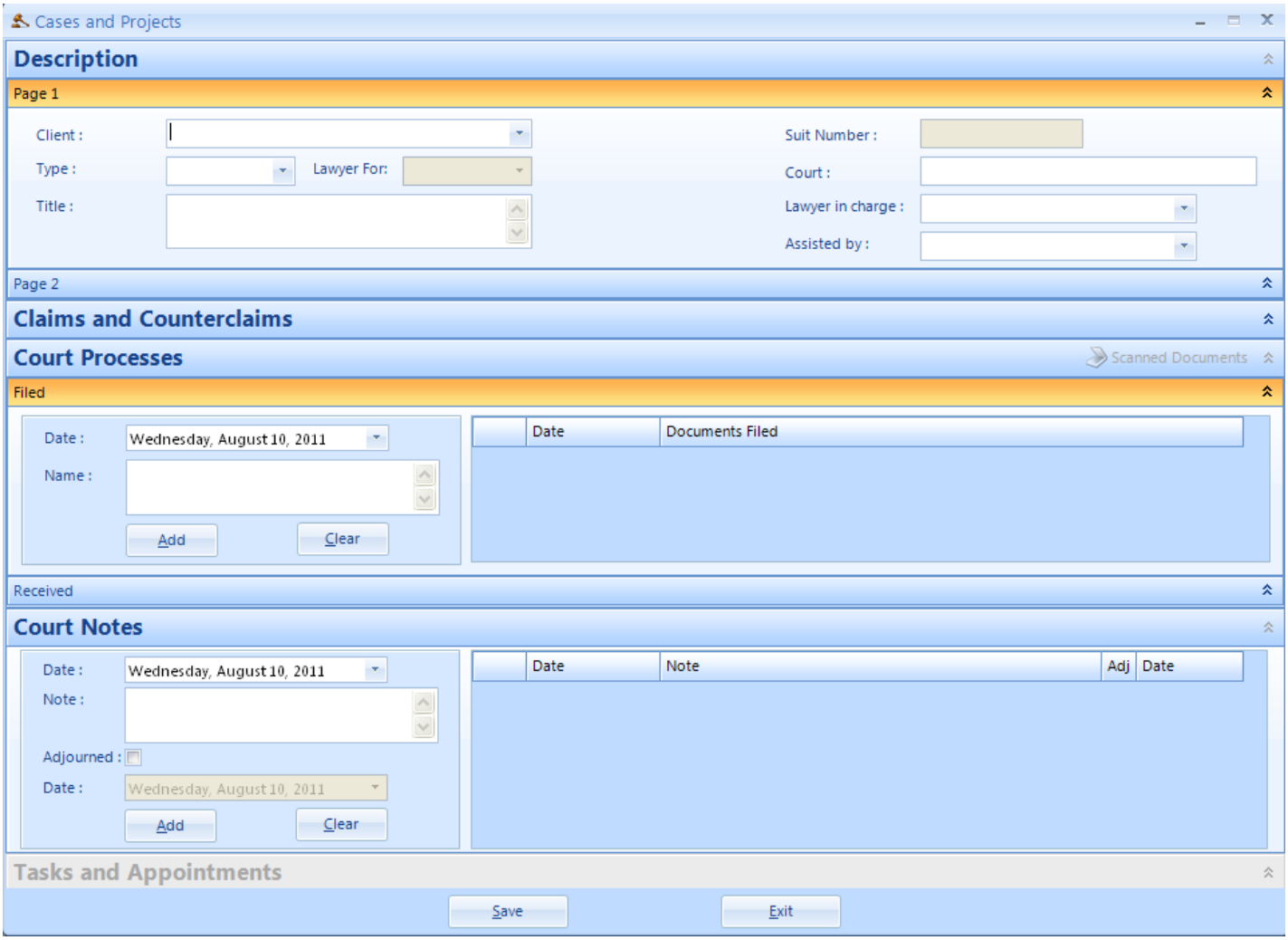


Fig 1.3

If the client does not exist, right-click on the 'Client' dropdown box and click 'Add' [Fig 1.4].

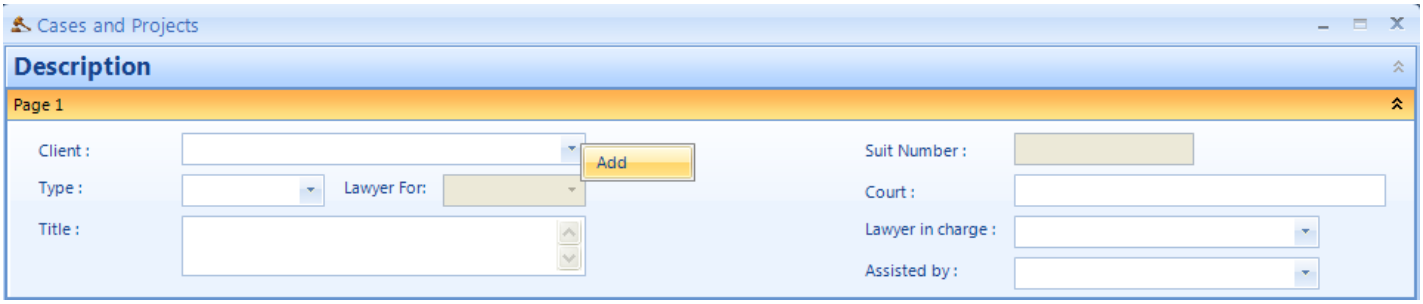


Fig 1.4.

Please refer to the section Add Client to add a new client.

Edit or Update Case/Project

Select Cases/Projects from the 'Search By' dropdown box [Fig 1.5].

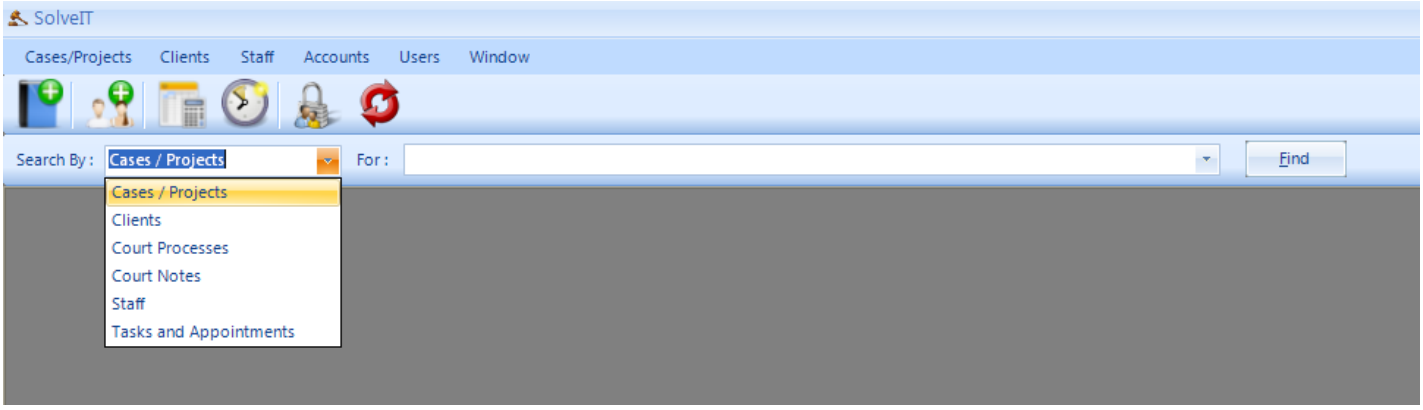


Fig 1.5.

Select the Case/Project from the 'For' dropdown box and click Find [Fig 1.6].

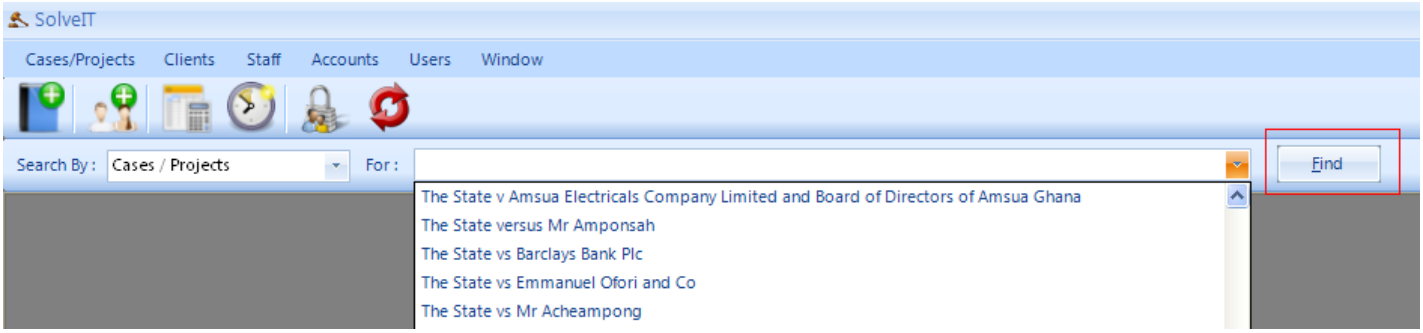


Fig 1.6.

Make desired changes and click Save.

Add or Update Court Notes

Select Court Notes from the 'Search By' dropdown box [Fig 1.7].

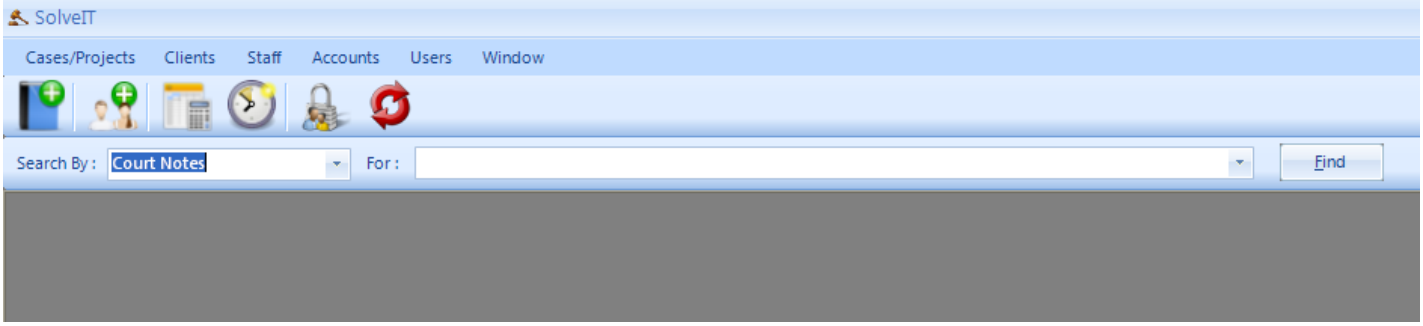


Fig 1.7.

Select the Case/Project from the 'For' dropdown box and click Find [Fig 1.8].

Fig 1.8.

Make desired additions/changes and click Save [Fig 1.9].

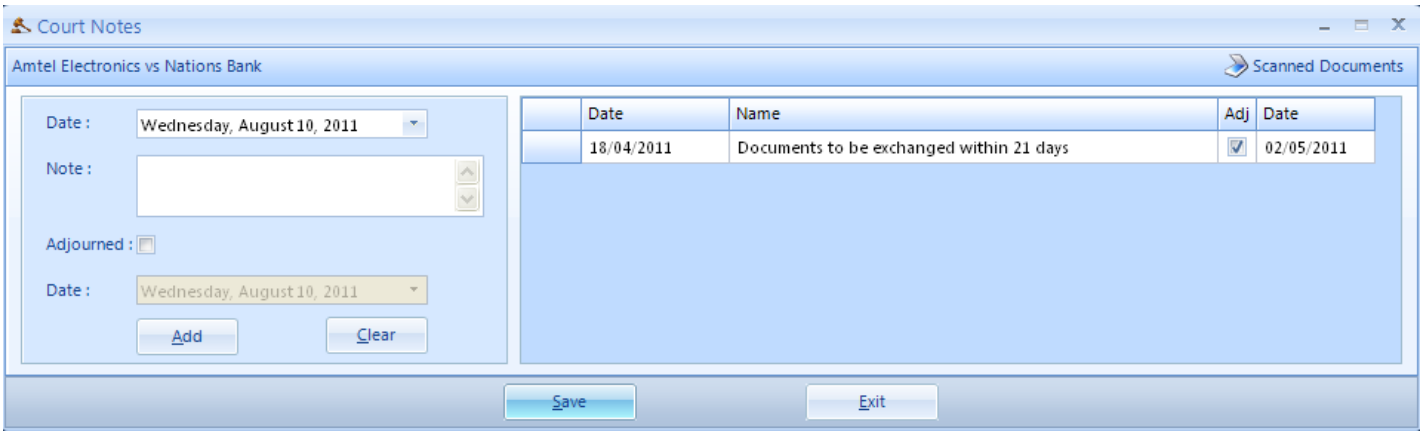


Fig 1.9.

Add or Update Court Processes

Select Court Processes from the 'Search By' dropdown box [Fig 1.10].

Fig 1.10.

Select the Case/Project from the 'For' dropdown box and click Find [Fig 1.11].

Fig 1.11.

Make desired additions/changes and click Save [Fig 1.12].

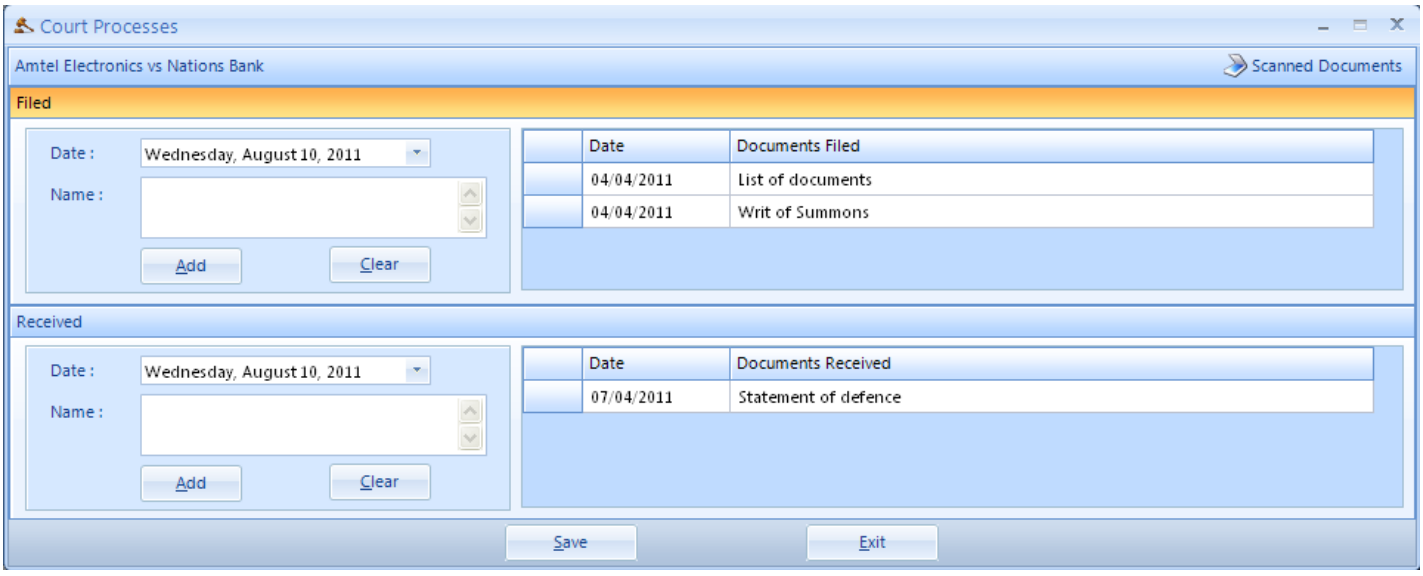
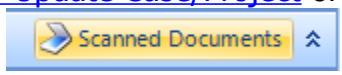


Fig 1.12.

Scanned Documents

Please refer to the section Edit or Update Case/Project or Add or Update Court Notes or Add or Update Court Processes. Click on 

to open the File share where all documents pertaining to that particular case are located.

Case/Project Report

Click Cases/Projects > Reports > Cases/Projects [Fig 1.13].

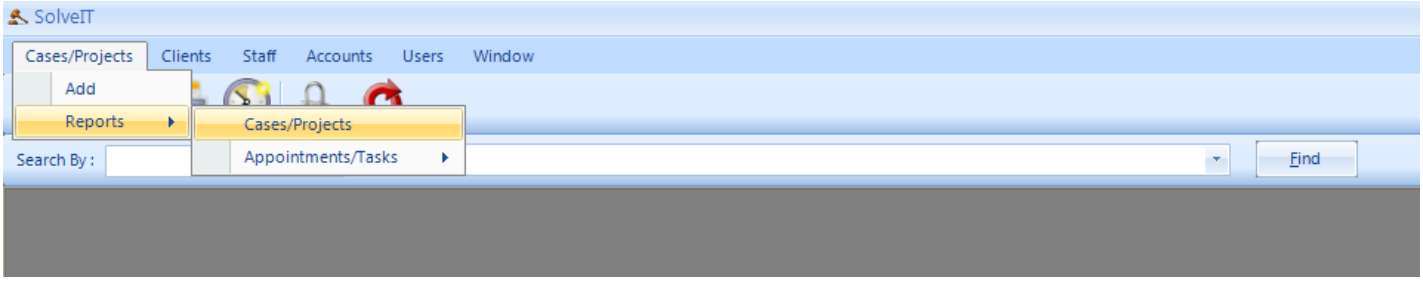


Fig 1.13.

Select the Case/Project from the Case/Project dropdown box and click Generate [Fig 1.14].

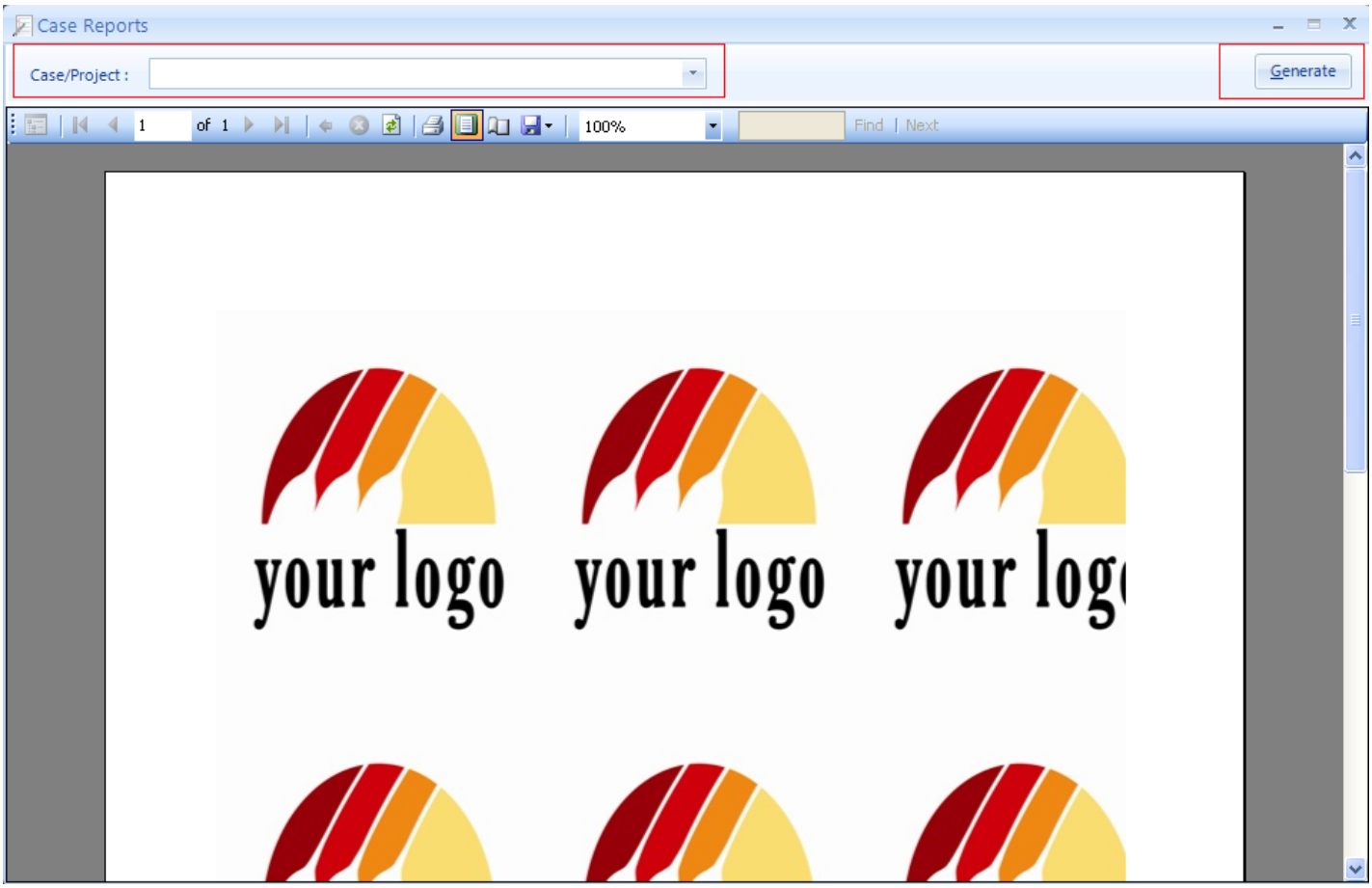


Fig 1.14.

2. CLIENTS

Add Client Info

Click Clients > Add [Fig 2.1] or click on the Add Client icon [Fig 2.2].

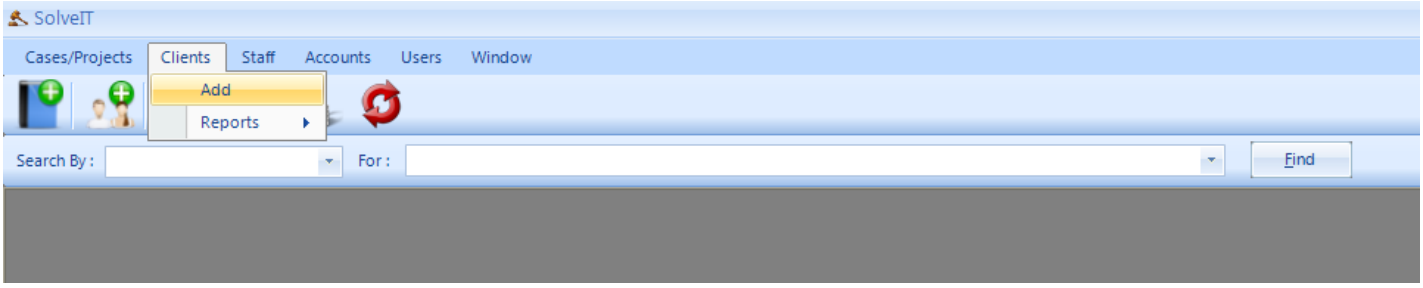


Fig 2.1.

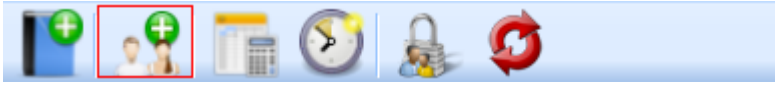


Fig 2.2.

Fill in the relevant fields and click 'Save' [Fig 2.3]. The error warning denotes a required field.

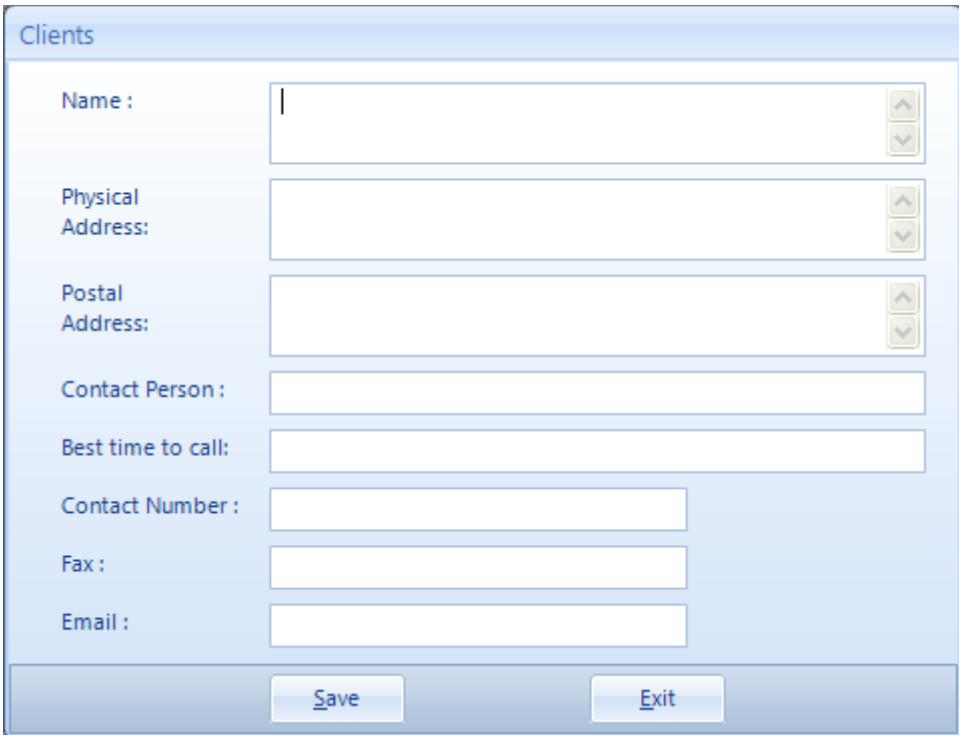


Fig 2.3.

Edit or Update Client Info

Select Clients from the 'Search By' dropdown box [Fig 2.4].

Fig 2.4.

Select the Client Name from the 'For' dropdown box and click Find [Fig 2.5].

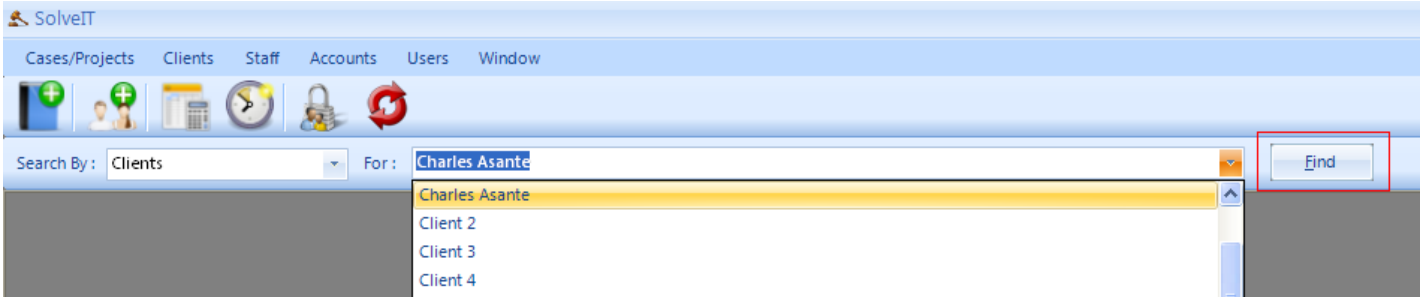


Fig 2.5.

Make desired additions/changes and click Save [Fig 2.6].

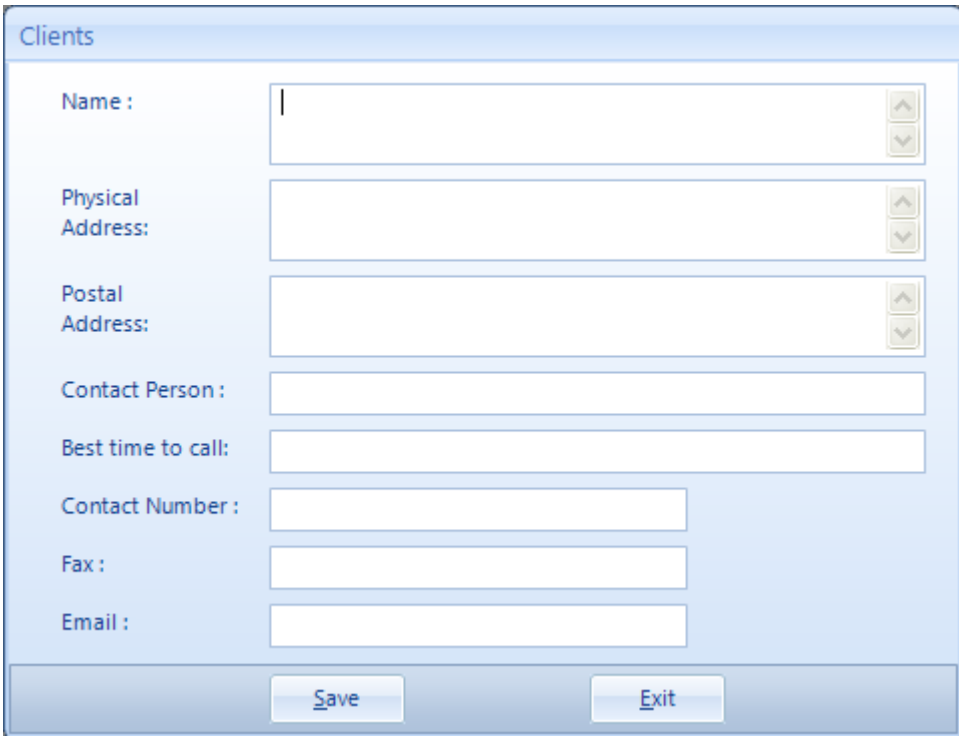


Fig 2.6.

3. STAFF

Add Staff Info

Click Staff > Add [Fig 3.1].

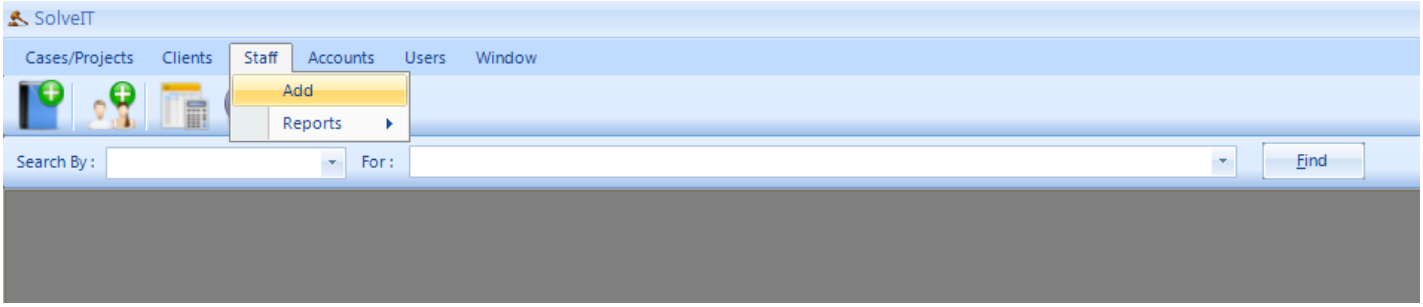


Fig 3.1.

Fill in the relevant fields and click Save [Fig 3.2]. The error warning denotes a required field.

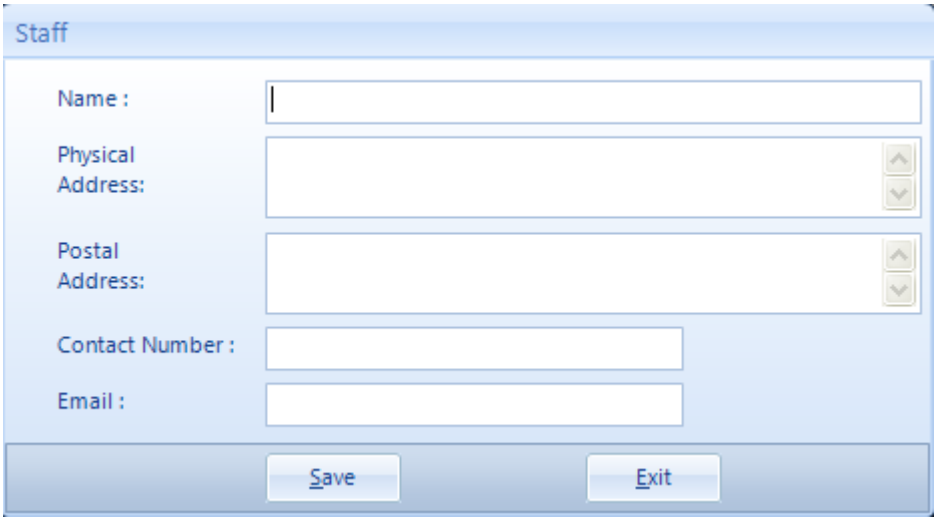


Fig 3.2.

Edit or Update Staff Info

Select Staff from the 'Search By' dropdown box [Fig 3.3].

Fig 3.3.

Select the Staff Name from the 'For' dropdown box and click Find [Fig 3.4].

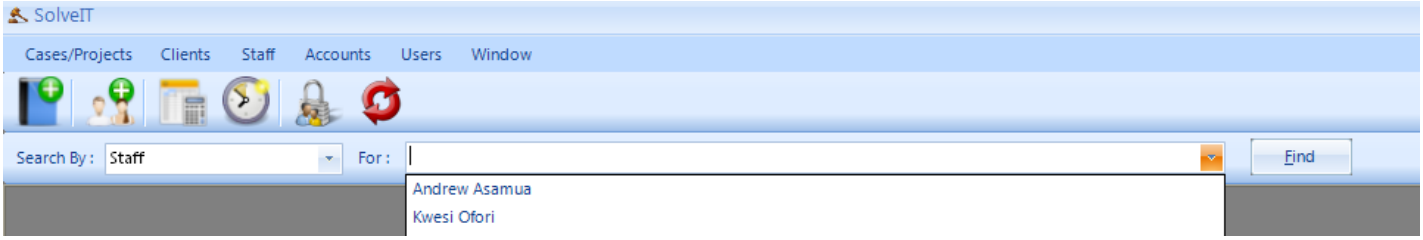


Fig 3.4

Make desired additions/changes and click Save [Fig 3.5].

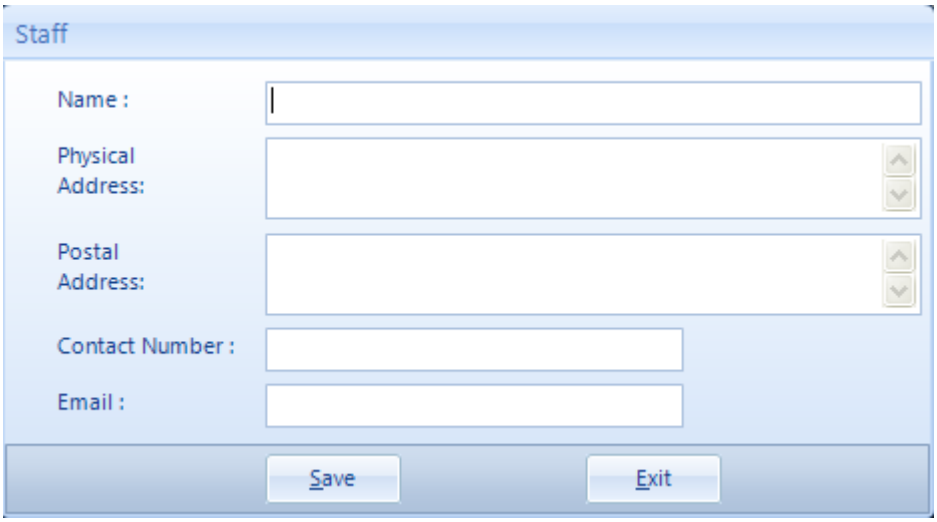


Fig 3.5.

4. TASKS AND APPOINTMENTS

Add Appointment/Task

Please refer to the section Edit or Update Case/Project. Alternatively, Select 'Tasks and Appointments' from the 'Search By' dropdown box [Fig 4.1].

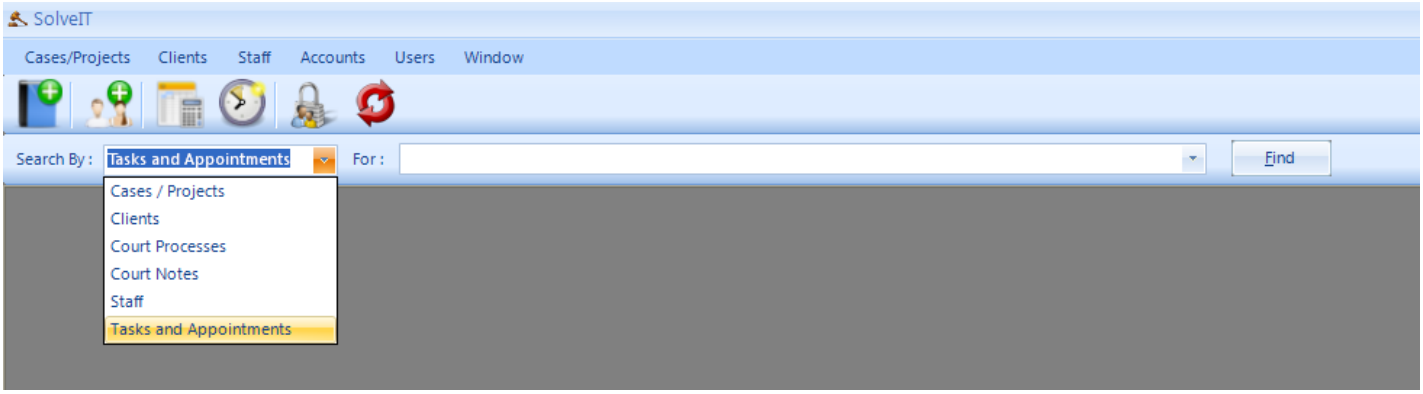


Fig 4.1.

Select the Case/Project Name from the 'For' dropdown box and click Find [Fig 4.2].

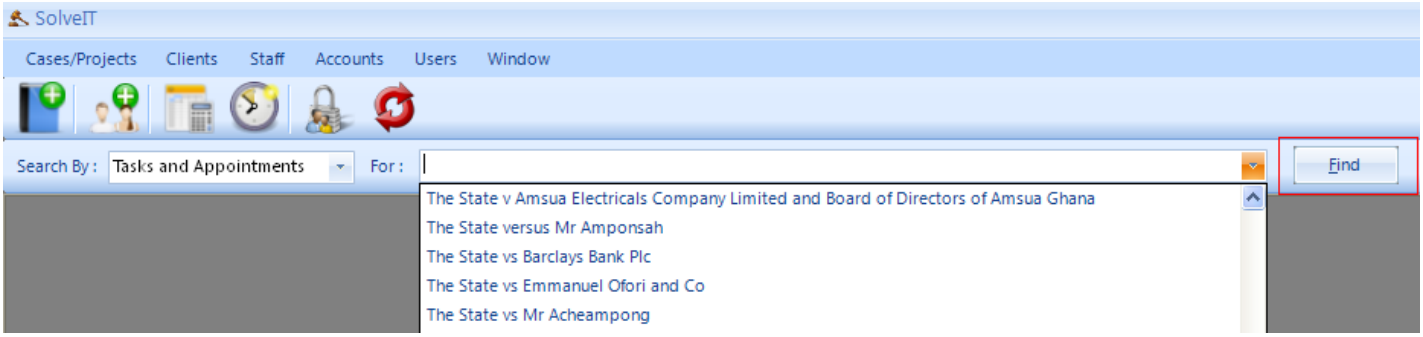


Fig 4.2.

Select the time duration and right-click. Click 'Add New' [Fig 4.3].

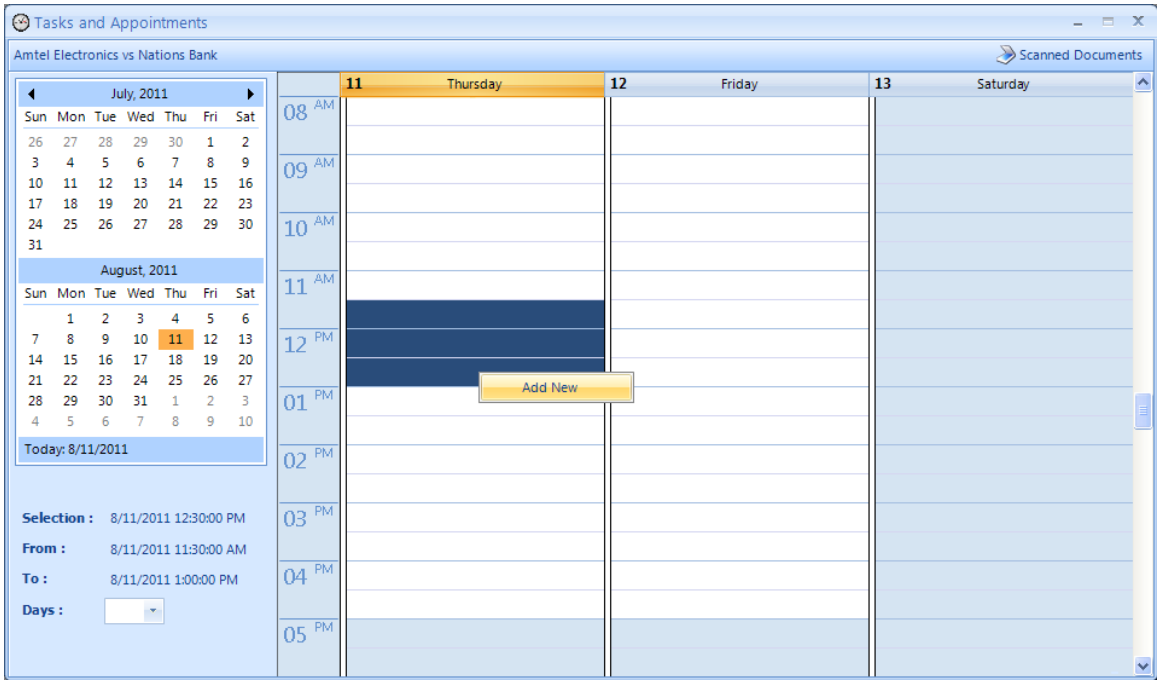


Fig 4.3.

Fill in the relevant fields and click Save [Fig 4.4]. The error warning denotes a required field.

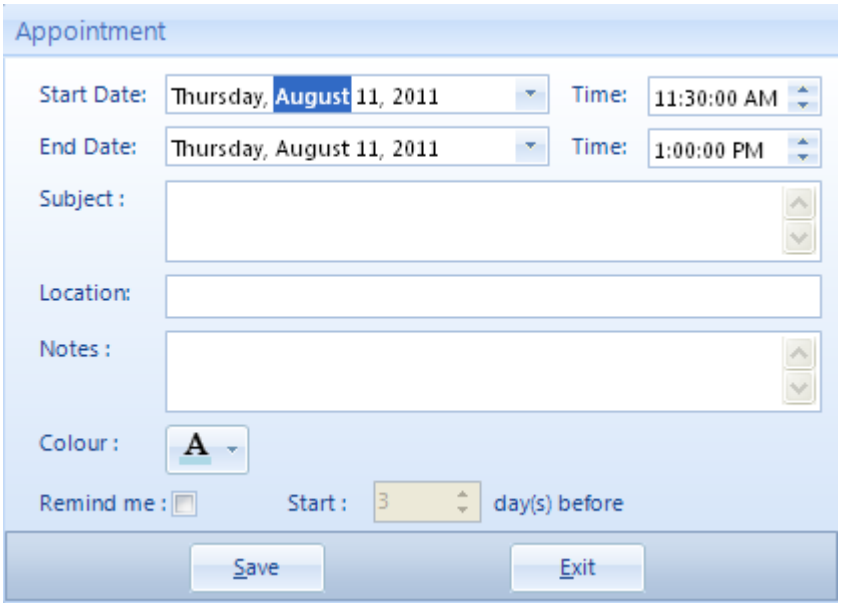


Fig 4.4.

To view details of a Task/Appointment, left-click on the Task/Appointment in the calendar view to show the popup. [Fig 4.5].

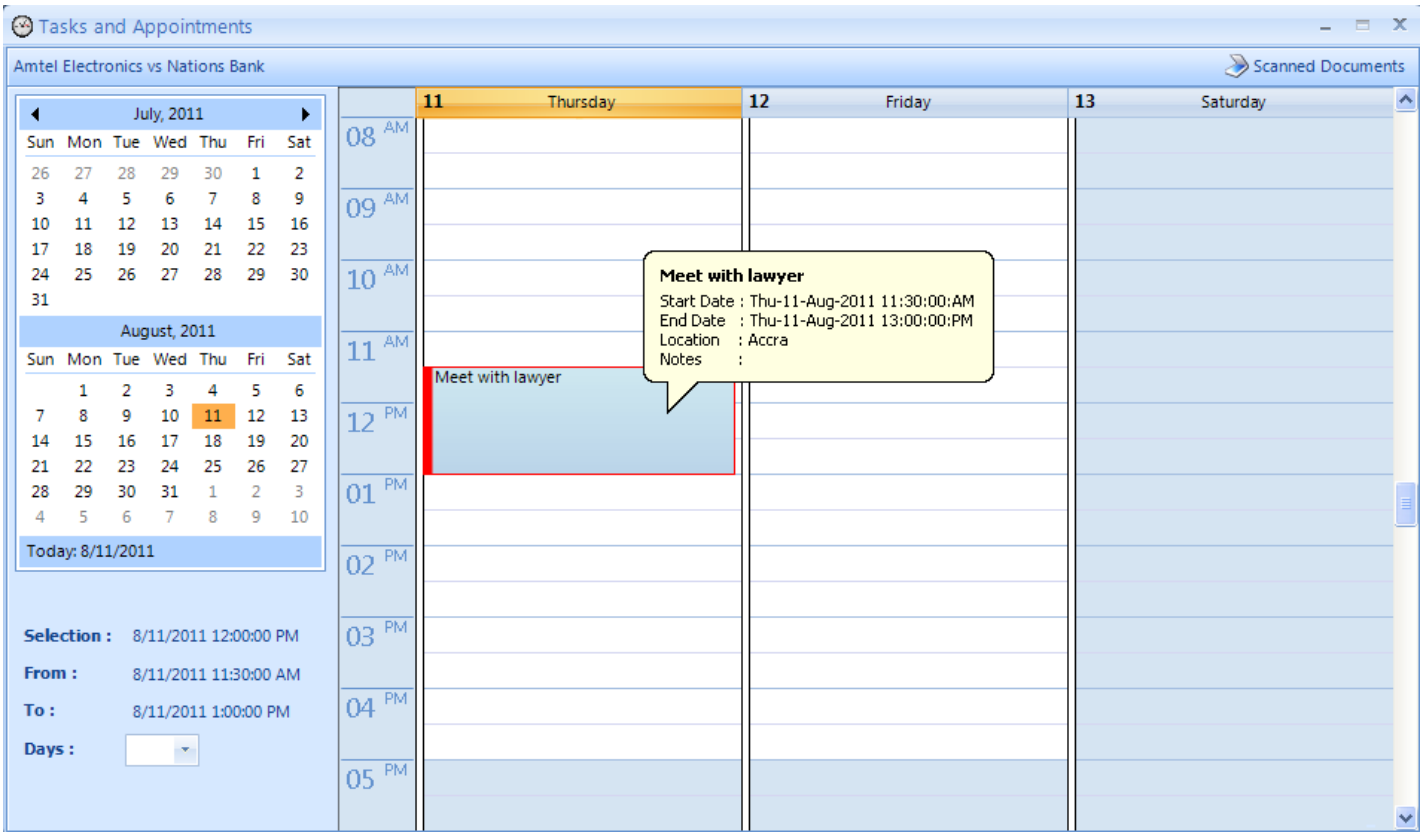


Fig 4.5.

Edit or Update Appointment/Task

Please refer to the section Edit or Update Case/Project or Add Appointment/Task

Left-click, then right-click on the task/appointment. Select 'Update' [Fig. 4.6].

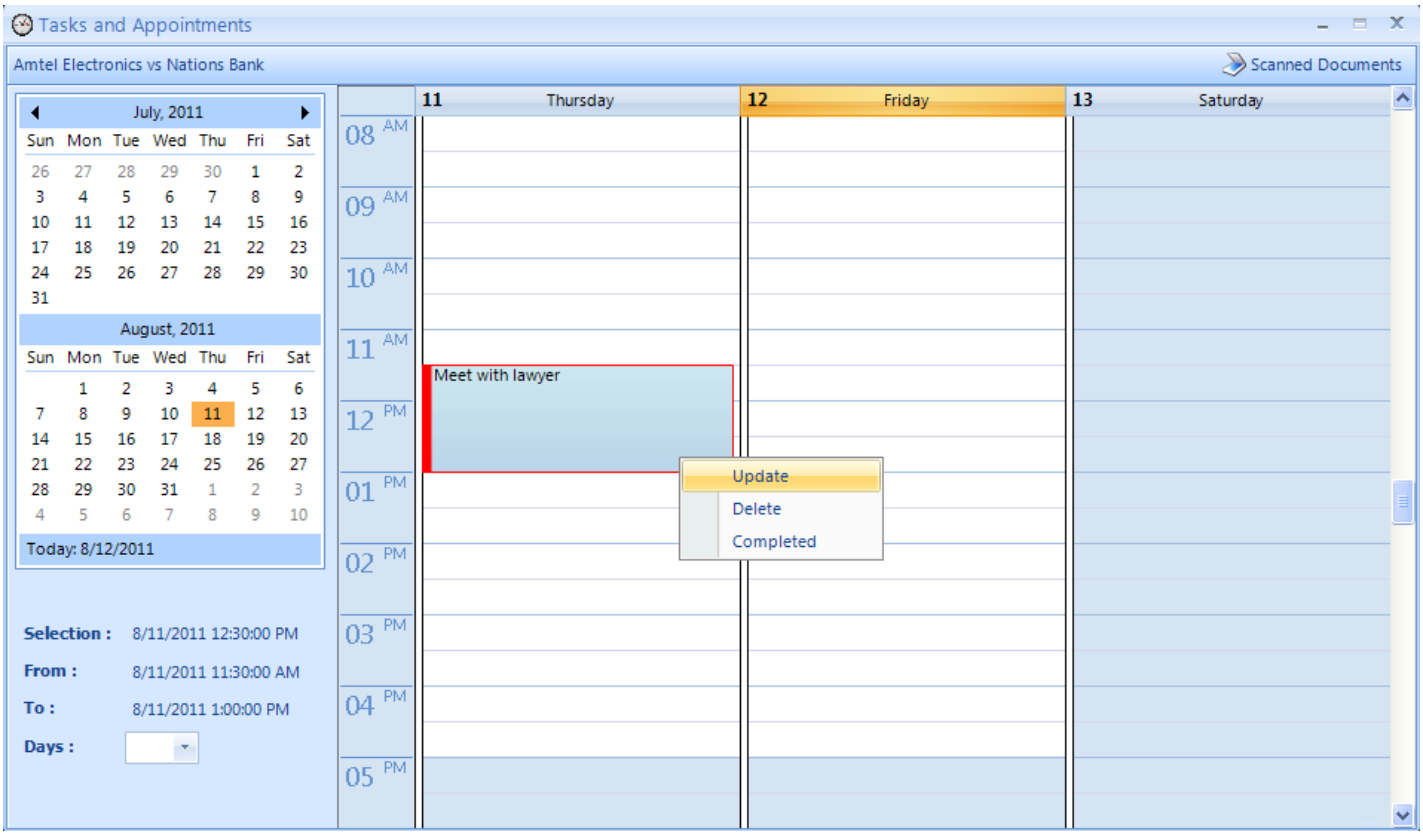


Fig 4.6.

Make desired additions/changes and click Save [Fig 4.7].

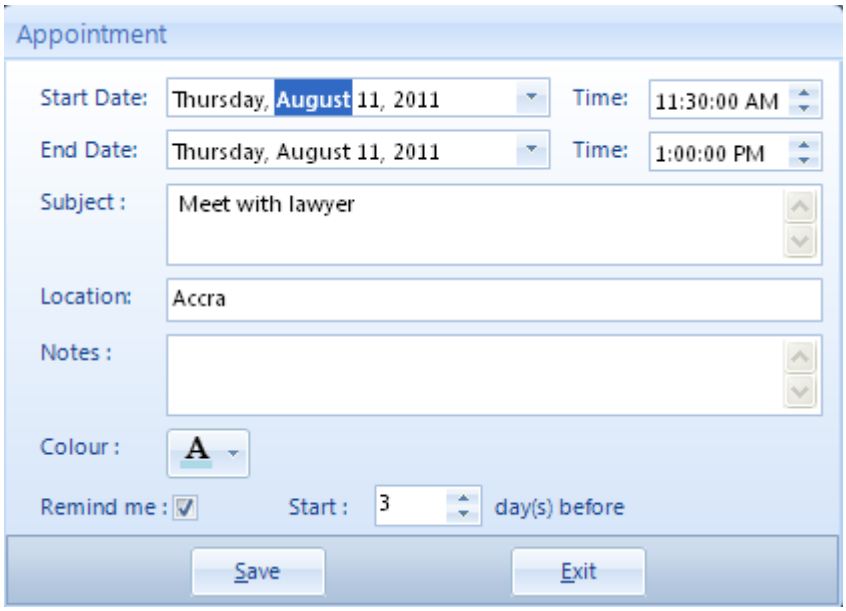


Fig 4.7.

Change Appointment/Task status

Please refer to the section Edit or Update Case/Project or Add Appointment/Task

An uncompleted task/appointment has a red outline. A completed one has a green outline. Left-click, then right-click on the task/appointment. Select 'Completed' [Fig. 4.8].

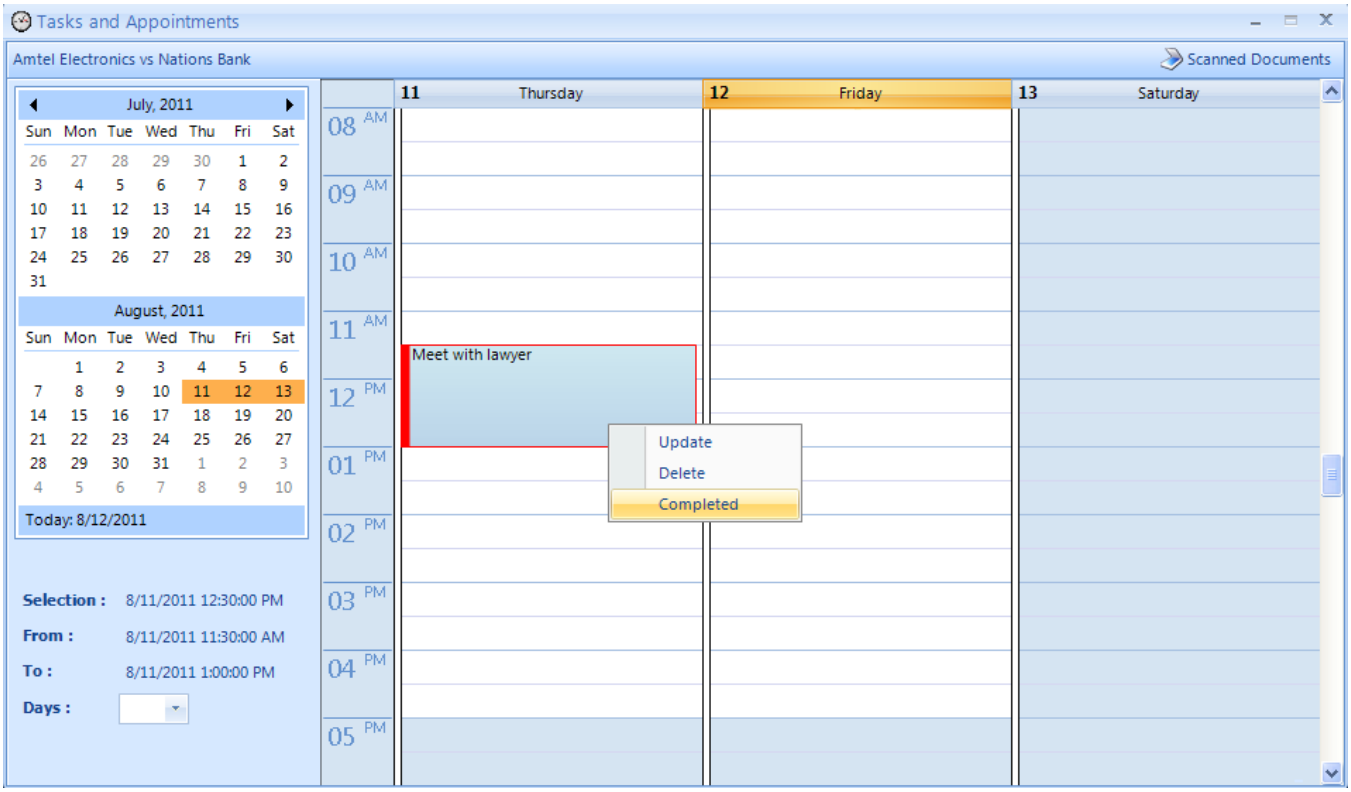


Fig 4.8.

The outline changes to green [Fig 4.9].

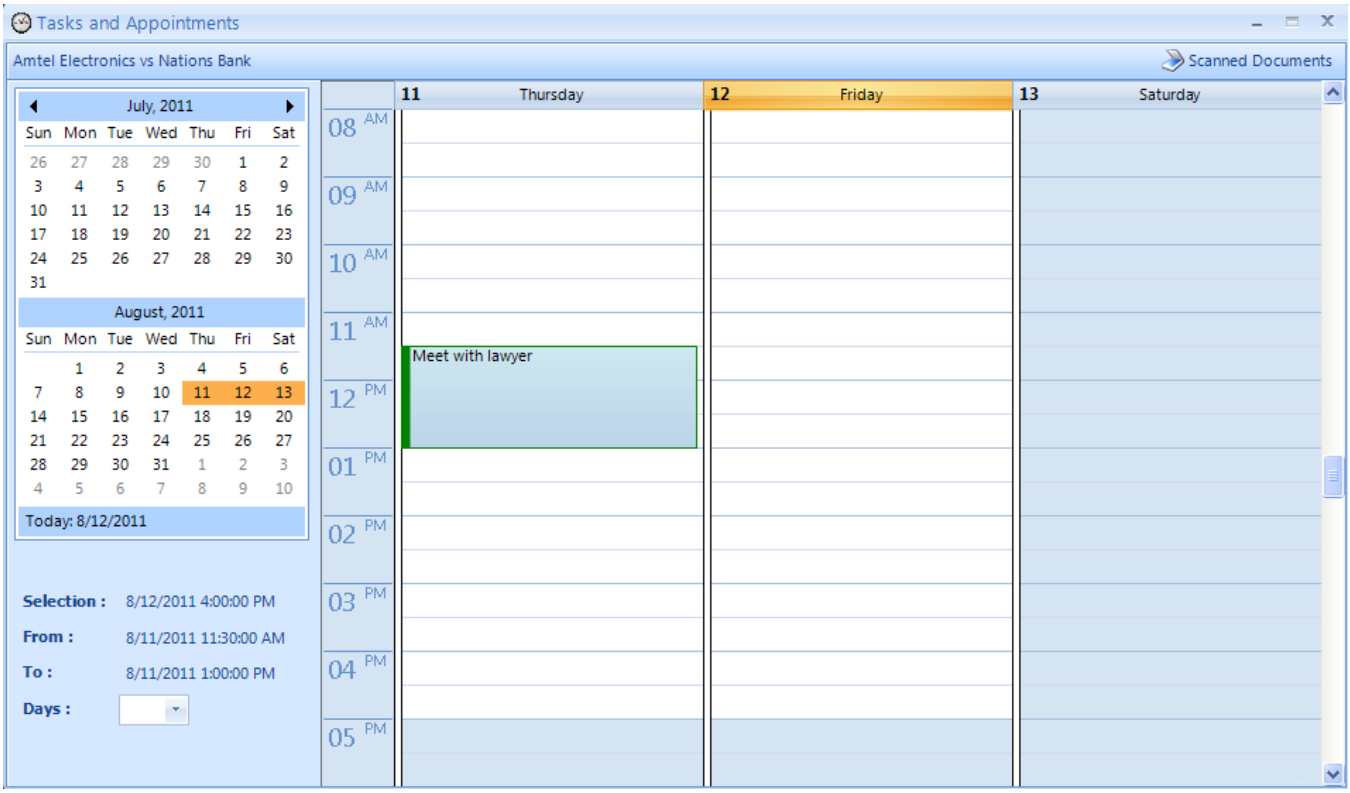


Fig 4.9.

Delete Appointment/Task

Please refer to the section Edit or Update Case/Project or Add Appointment/Task

Left-click, then right-click on the task/appointment. Select 'Delete' [Fig. 4.10].

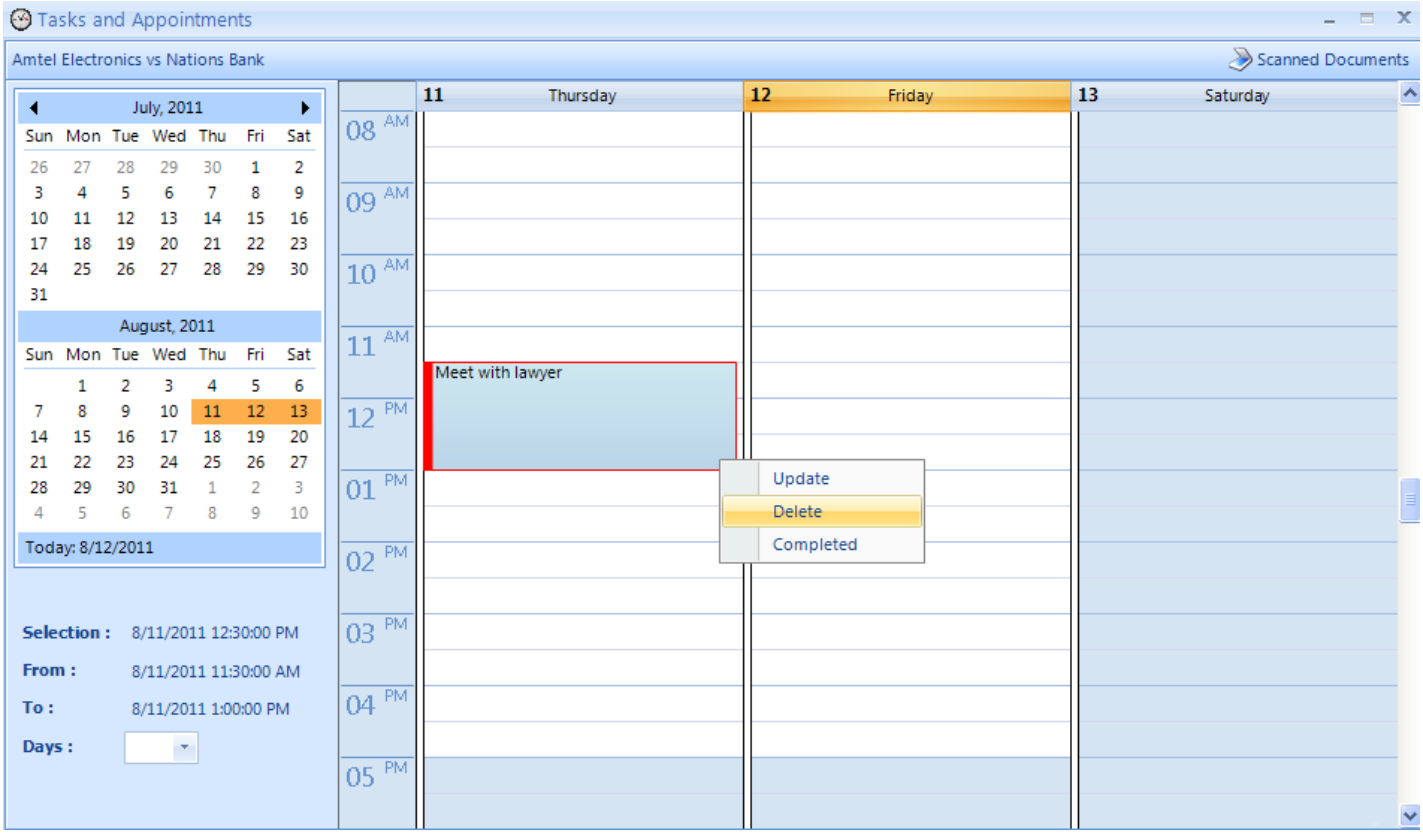


Fig 4.10

Click 'OK' to confirm the action or 'Cancel' to quit [Fig 4.11].

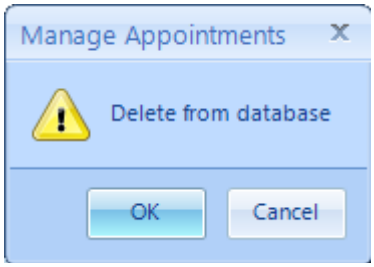


Fig 4.11.

5. ACCOUNTS

Billing

Click Accounts > Billing [Fig 5.1] or click the Billing icon [Fig 5.2].

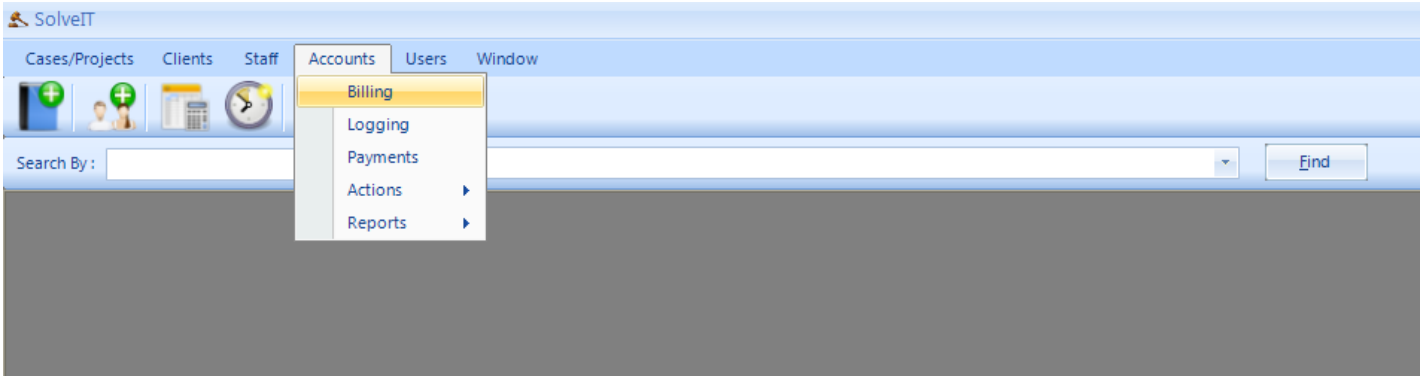


Fig 5.1

Fig 5.2

Fill in the relevant fields and click Save [Fig 5.3]. The error warning denotes a required field.

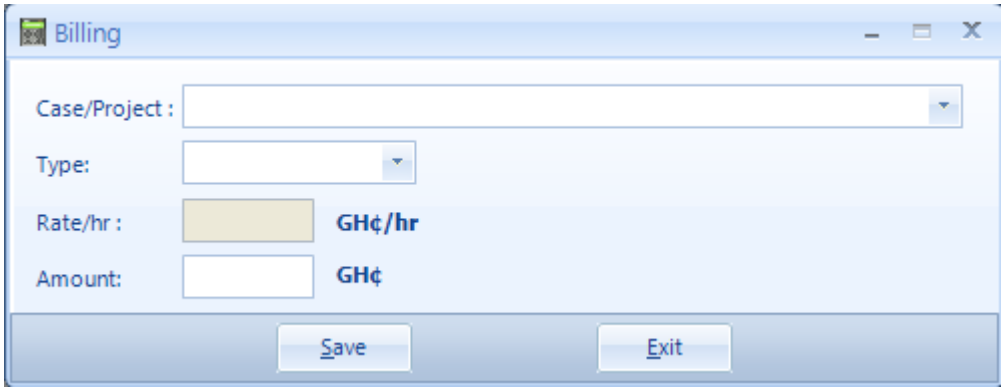


Fig 5.3

Logging

Click Accounts > Logging [Fig 5.4] or click the Logging icon [Fig 5.5].

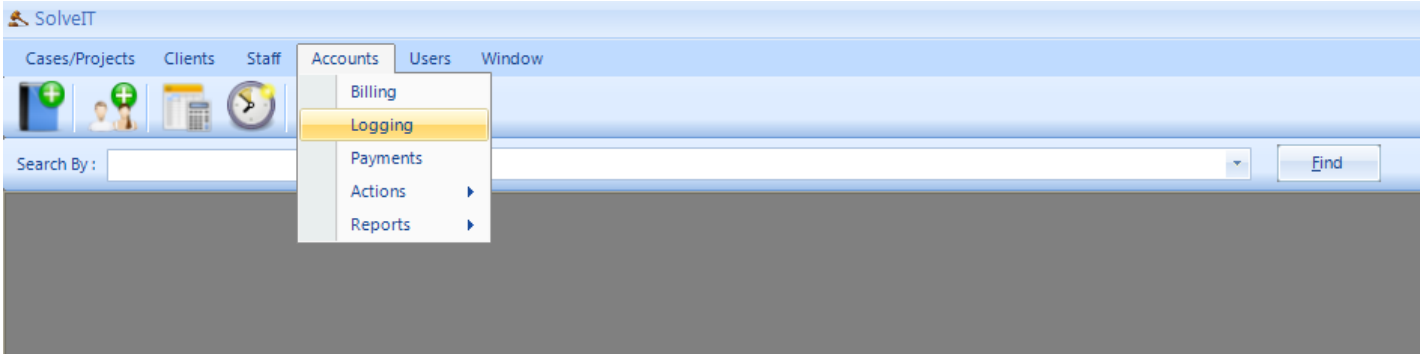


Fig 5.4

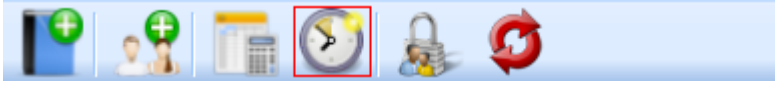


Fig 5.5

Fill in the relevant fields and click 'Save' [Fig 5.6]. The error warning denotes a required field.

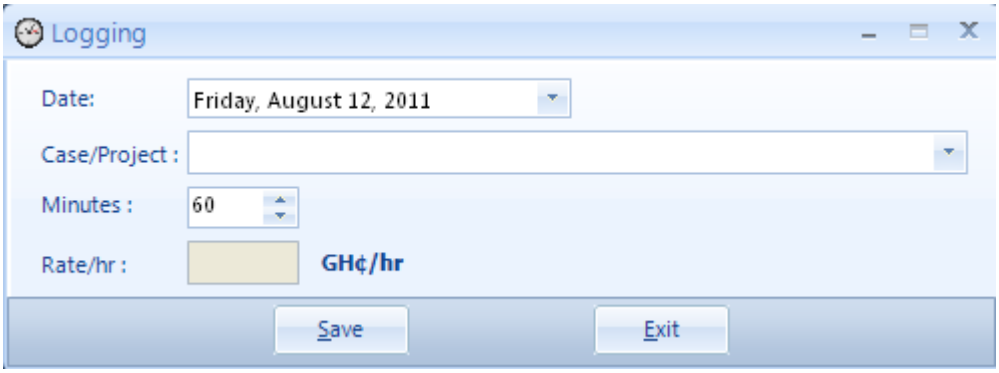


Fig 5.6

Payments

Click Accounts > Payments [Fig 5.7].

Fig 5.7

Fill in the relevant fields and click 'Save' [Fig 5.8]. The error warning denotes a required field.

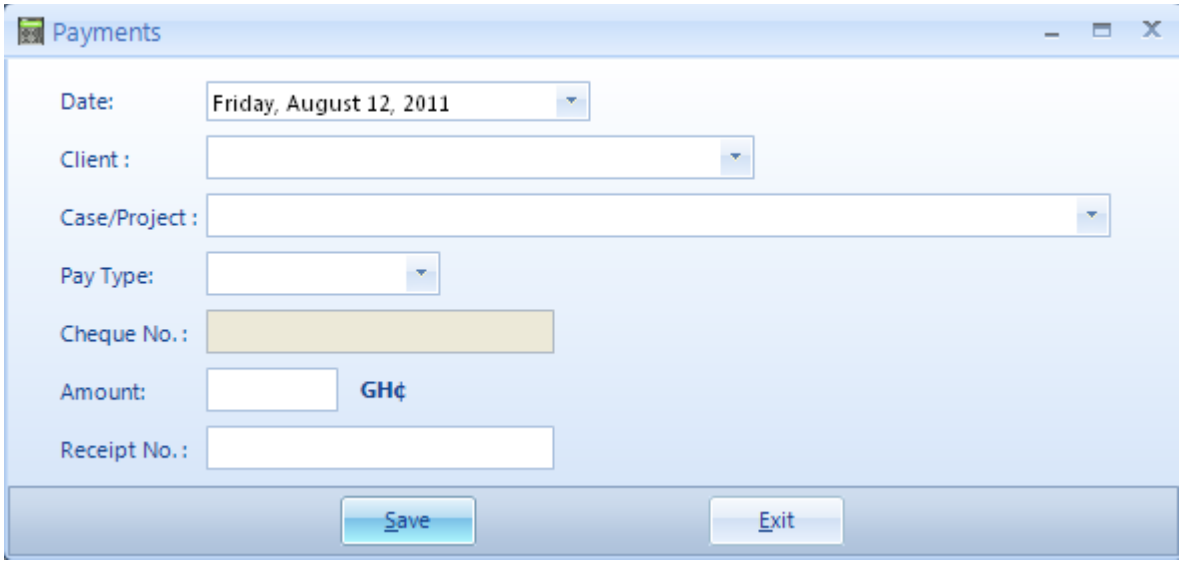


Fig 5.8

Edit Billing

Click Accounts > Actions > Edit Billing [Fig 5.9].

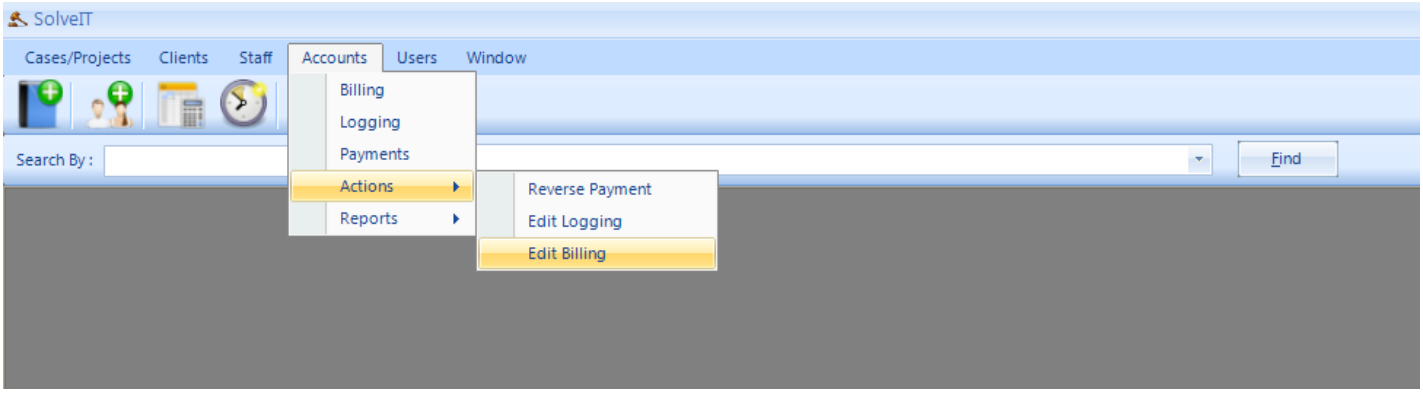


Fig 5.9

Use the 'Date' field or the 'Case' field to search [Fig 5.10]

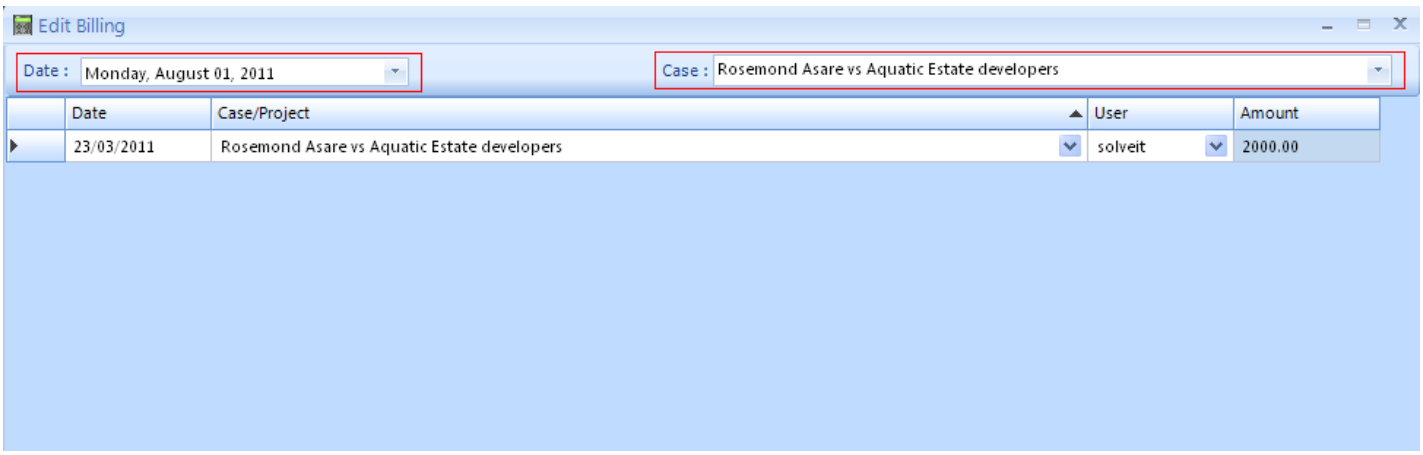


Fig 5.10

Double-click on the relevant field to make changes [Fig 5.11].

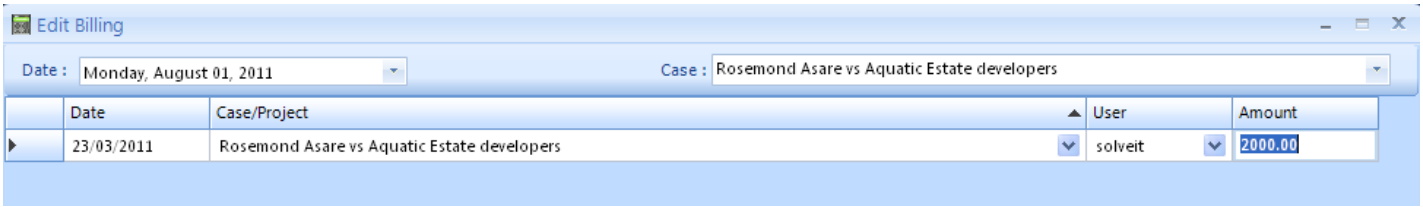


Fig 5.11

Edit Logging

Click Accounts > Actions > Edit Logging [Fig 5.12].

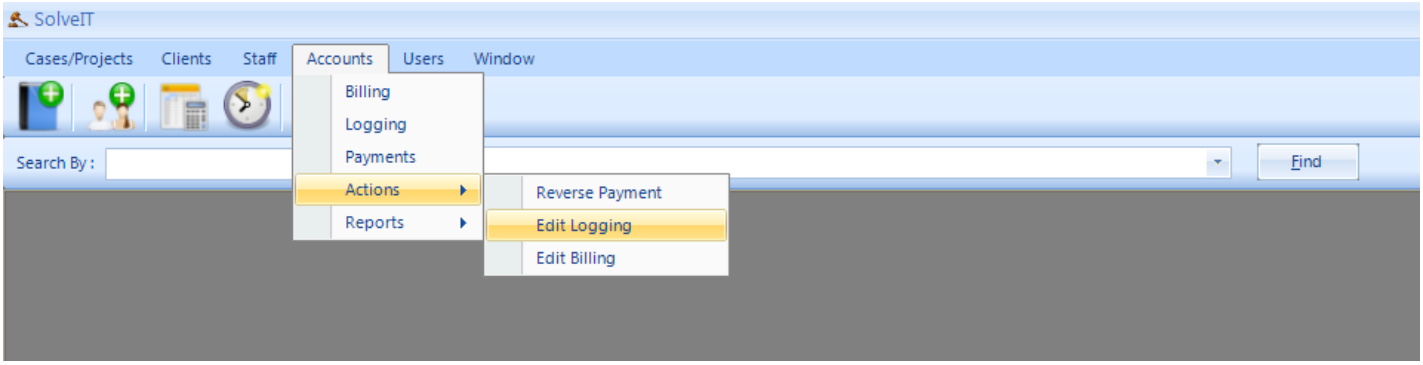


Fig 5.12

Use the 'Date' field or the 'Case' field to search [Fig 5.13]

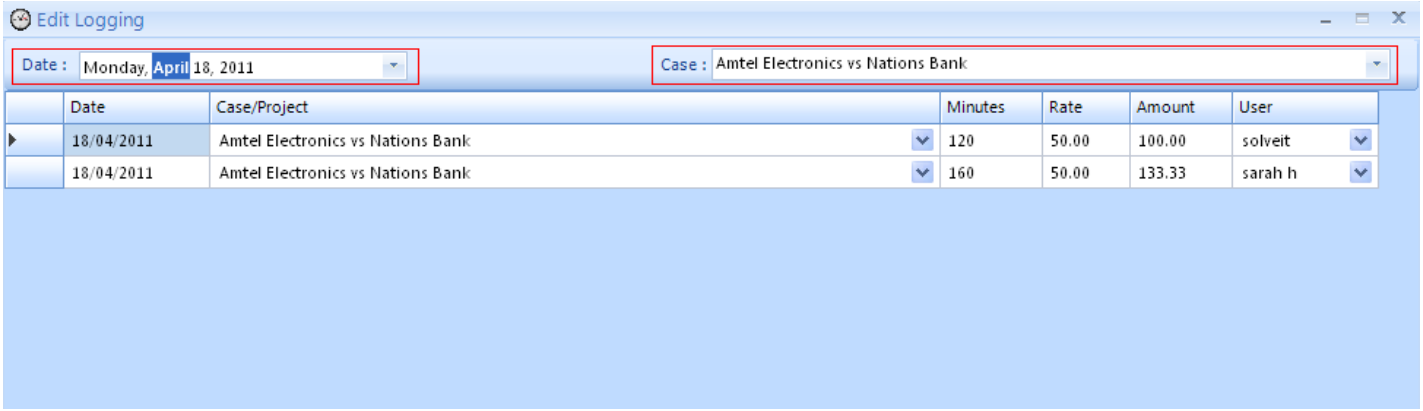


Fig 5.13

Double-click on the relevant field to make changes [Fig 5.14].

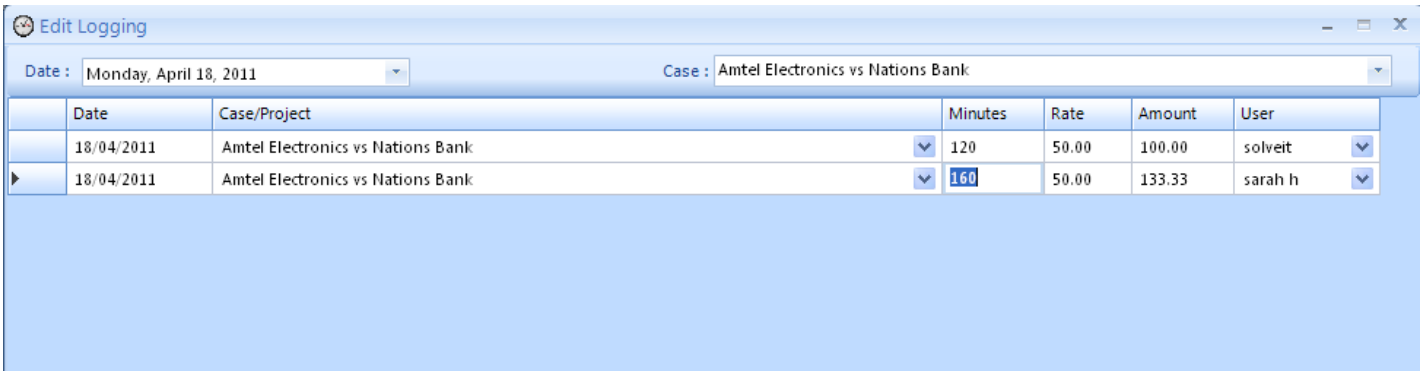


Fig 5.14

Reverse Payment

Click Accounts > Actions > Reverse Payment [Fig 5.15].

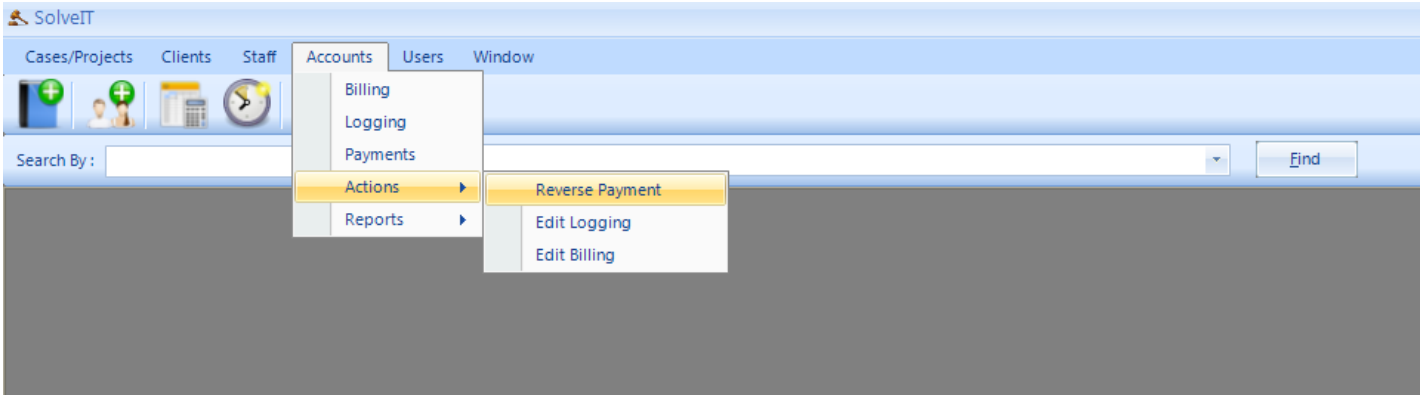


Fig 5.15

Use the 'Date' field or the 'Client' field to search. Right-click on the payment to be reversed and click 'Reverse' [Fig 5.16].

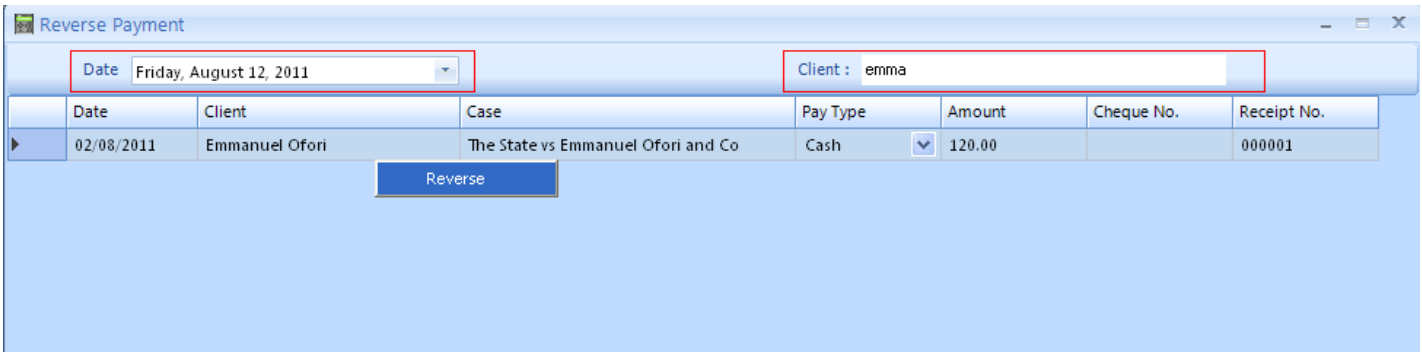


Fig 5.16

Click 'Yes' to continue, 'No' to cancel [Fig 5.17].

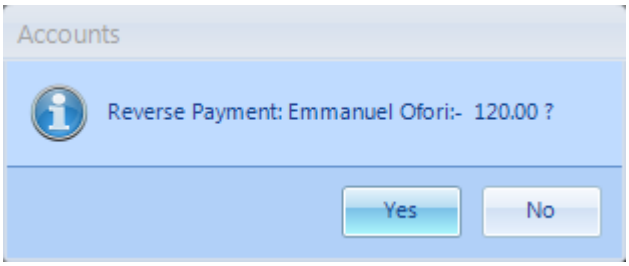


Fig 5.17

Delete Billing

Please refer to the section Edit Billing.

Right-click on the row to be deleted and click 'Delete' [Fig 5.18].

Fig 5.18

Click 'Yes' to continue, 'No' to cancel [Fig 5.19].

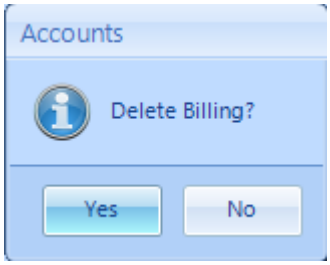


Fig 5.19

Delete Logging

Please refer to the section Edit Logging.

Right-click on the row to be deleted and click 'Delete' [Fig 5.20].

Fig 5.20

Click 'Yes' to continue, 'No' to cancel [Fig 5.21].

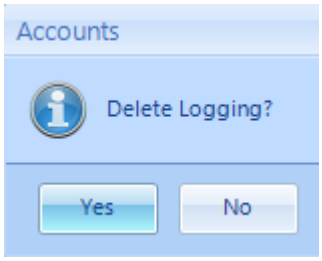


Fig 5.21.