<u>Law Engine - Basic App Usage Documentation</u>

1. Intake Information
    a. Begin by entering “Intake” Information related to either a client or potential client.
    b. Save the “Intake” record.
    c. Once you are ready to convert the intake into a Matter, change the intake record status to “Converted”.
2. Once the status is changed to Converted, a new contact, matter, and contact intake relationship is created.
3. To begin using the “Matter” to keep track of the legal case, use the “Matter” that was created after intake conversion.
4. Use the “Matter Account Relationship” to create new relationships relative to different Account Record Types.