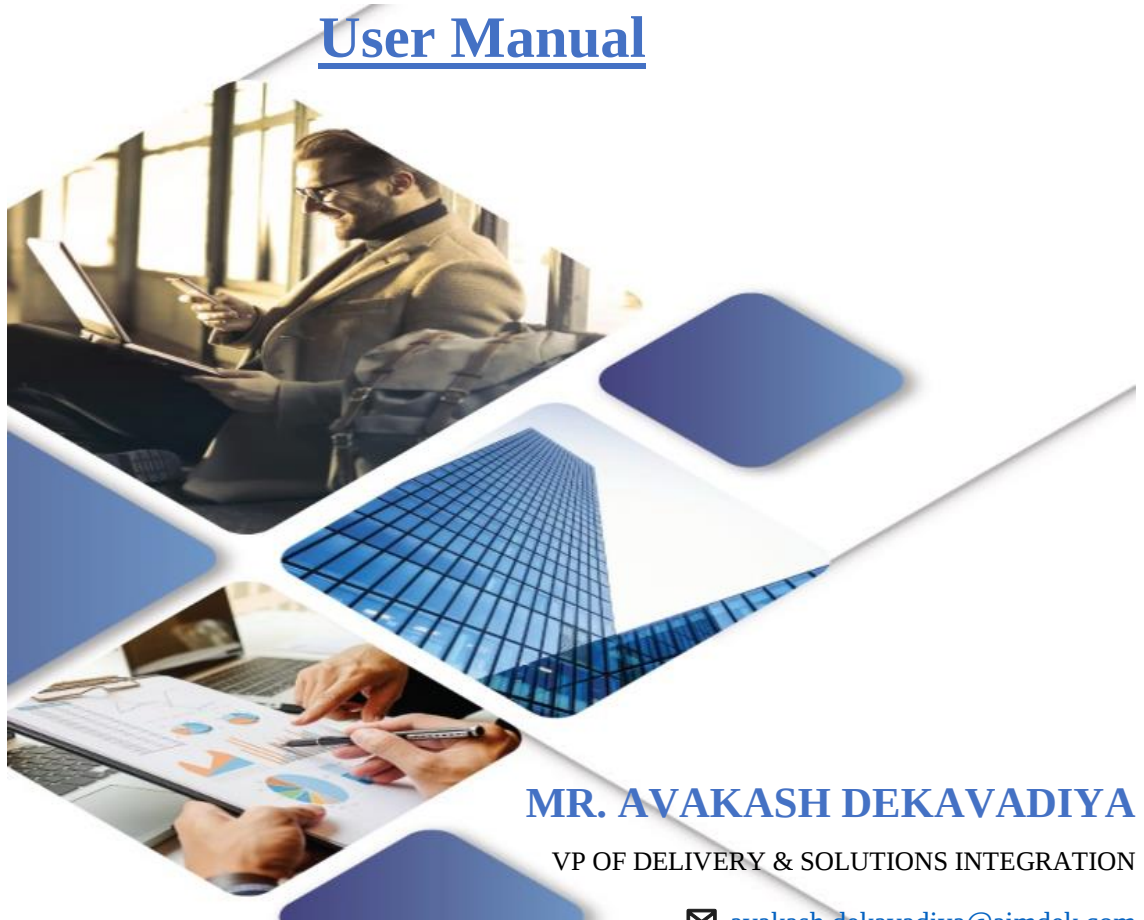




AttorneyOnline

Legal Practice Management System

User Manual



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1. Introduction

1.1 Document Purpose

The purpose of this User Guide is to explain how to install and use the AttorneyOnline application. The document contains a table of contents, detailed information, images and a frequently asked questions section for better understanding.

1.2 Application Overview

AttorneyOnline simplifies the firm's daily operations, enabling the attorneys to manage, store, and track legal cases and records (e.g., contacts, matters, documents, appointments, deadlines, tasks, invoice and payment transactions etc.) as well as providing them help with accounting operations, such as invoicing billable time and recording. This means that such an all-in-one legal system offers a mix of document management, CRM, accounting programs, scheduling/time tracking, and project management features precisely for attorneys. This system further automates basic procedures, such as preventing duplicate data entry and promoting secure sharing of information within the firm. With the right case management system, the law firm can save time, money, and effort with fewer chances of error, making sure that nothing is missed.

2. Administration

This section will help you set up your organization to start using AttorneyOnline app application on the web and in Salesfroce1. In order to set up your AttorneyOnline application, you need to do steps 2.1 to 2.7.

2.1 Install AttorneyOnline application

In order to install the AttorneyOnline application:

1. Go to AppExchange

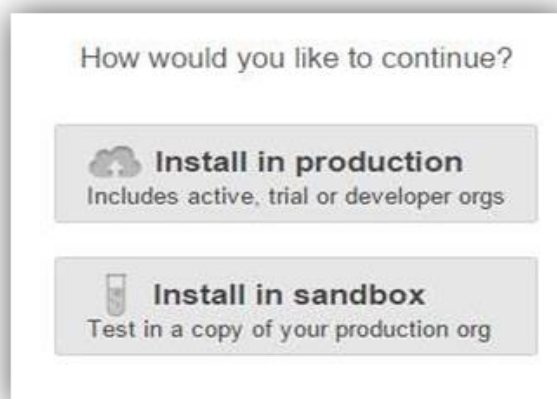
<http://www.salesforce.com/appexchange>

2. Search for AttorneyOnline

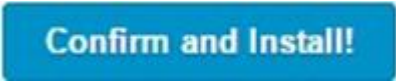
3. Click the  button.

4. Click the option Log in to the AppExchange.

5. You can then select to install AttorneyOnline in either Production (includes active, trail or developer orgs) or Sandbox.



6. Select check box to agree the terms and conditions.

7. Click the  button.
8. Enter your organization credentials.
9. Select installation details (either for Admin Only, All Users, or Specific Profiles)
10. Then click Install.

If the installation is successfully completed, you will see the confirmation message.

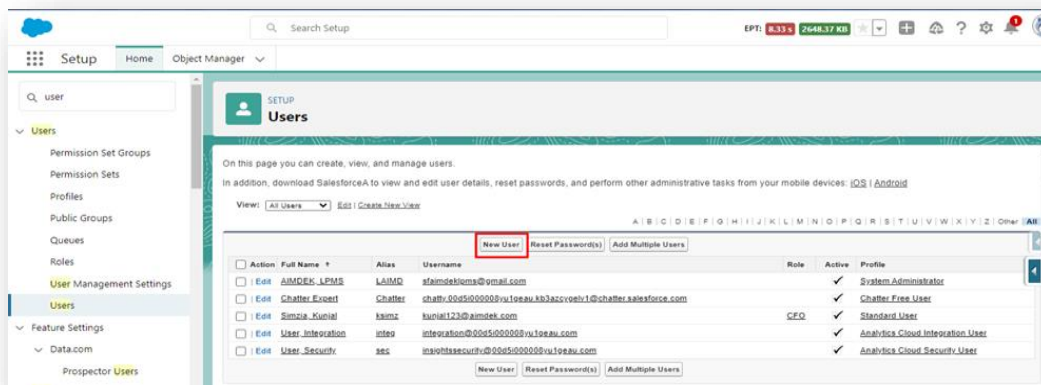
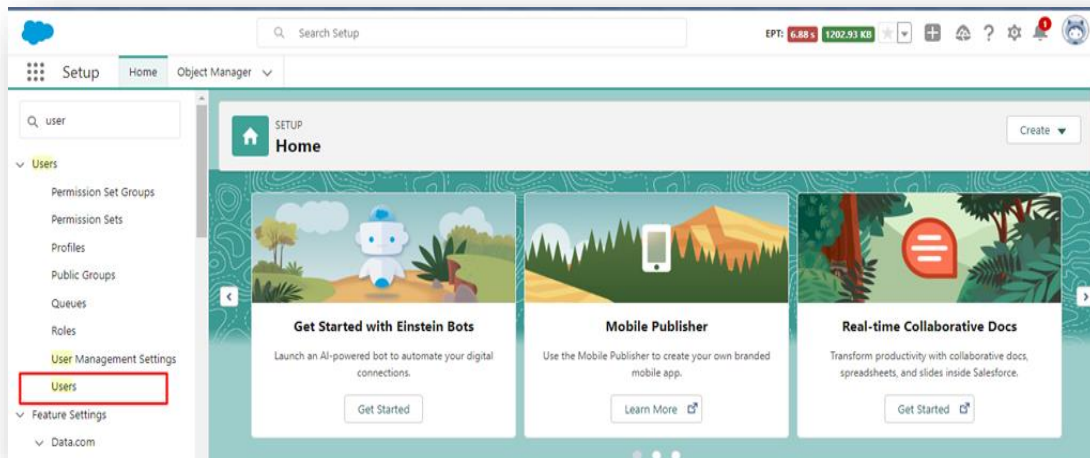
2.2 Prerequisites

Before using the application, there are some pre-requisites to be followed, there is a need for a user-account. There are two types of main users as below:

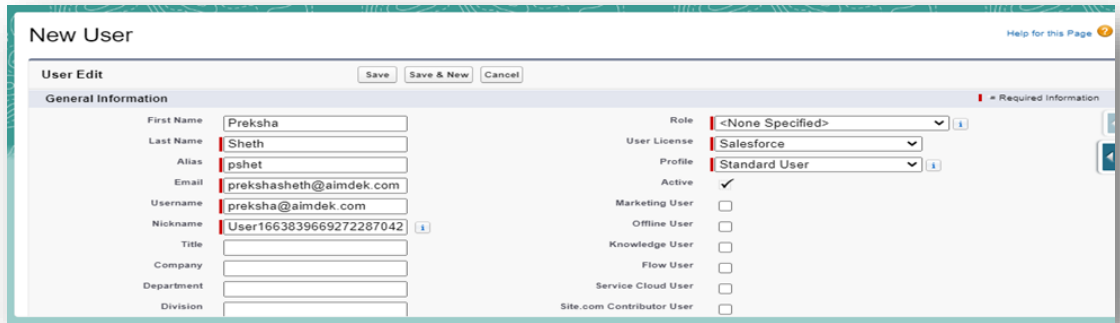
- Admin User (System Administrator)
- Standard User

2.2.1 Create User

- Go to setup
- Write users in quick find box



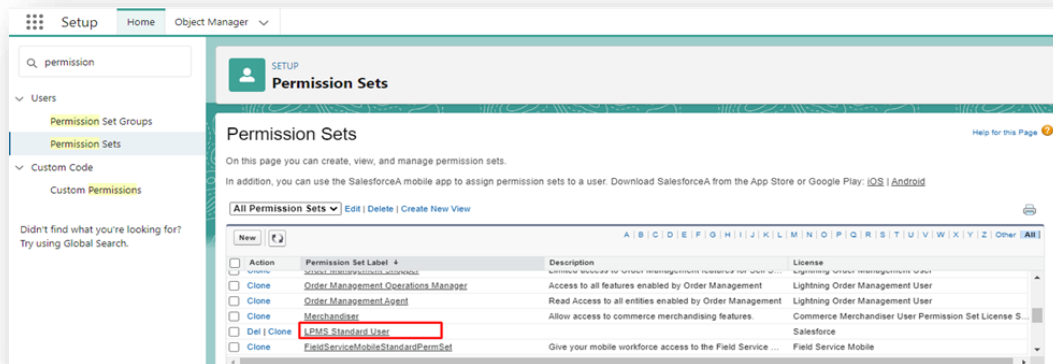
- Click on the new user button
- While adding all the information, specify “Salesforce” in the “User License” field and select “Standard User” in the “Profile” dropdown selection.



2.2.2 Assign permission set to standard user:

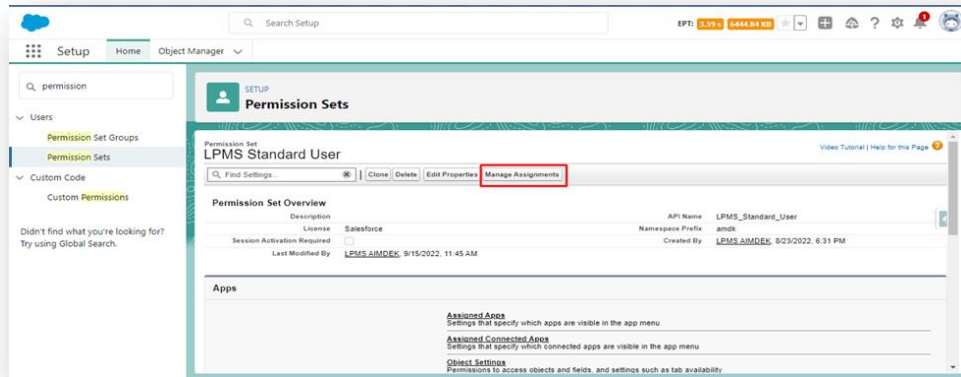
There is a need to assign permissions to specific users, we need to follow the steps below:

- Search 'permission set' in quick find in setup
- Select AttorneyOnline Standard User'

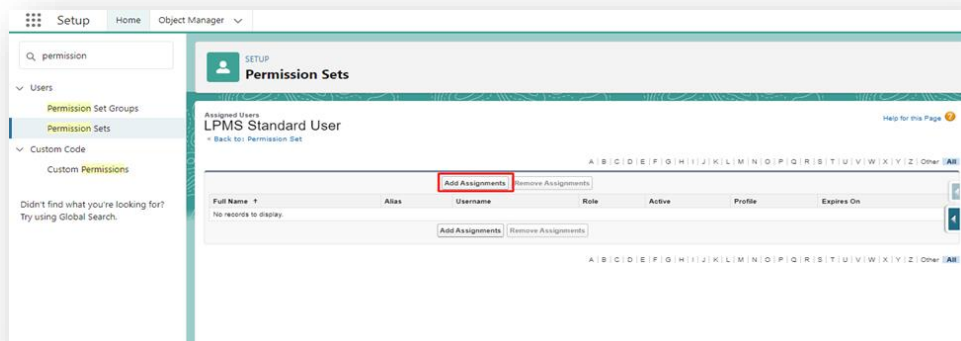


Action	Permission Set Label	Description	License
☐	AttorneyOnlineStandardUser	AttorneyOnlineStandardUser	AttorneyOnlineStandardUser
☐	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
☐	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
☐	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
☐	LPMS Standard User		Salesforce
☐	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service ...	Field Service Mobile

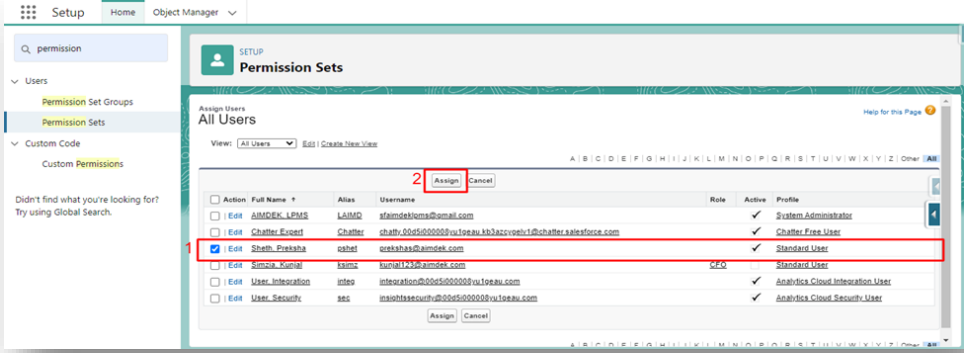
- Select 'Manage Assignment'



- Select 'Add Assignment'



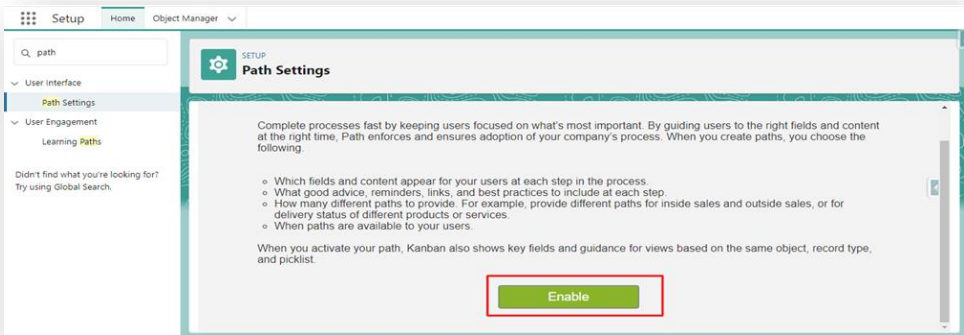
- Select the standard user you want to Assign and save.



Only System Administrator can assign the permission set to the user.

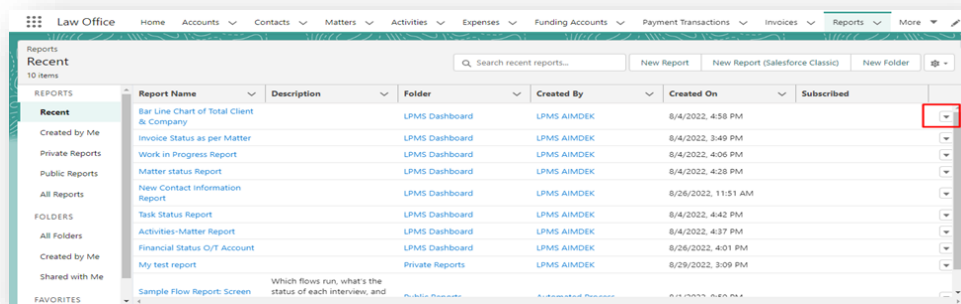
Next step in the process is to “Enable Path”, follow below procedure to do this action:

- Go to Setup
- Go to path setting
- Click the “Enable” button as shown below

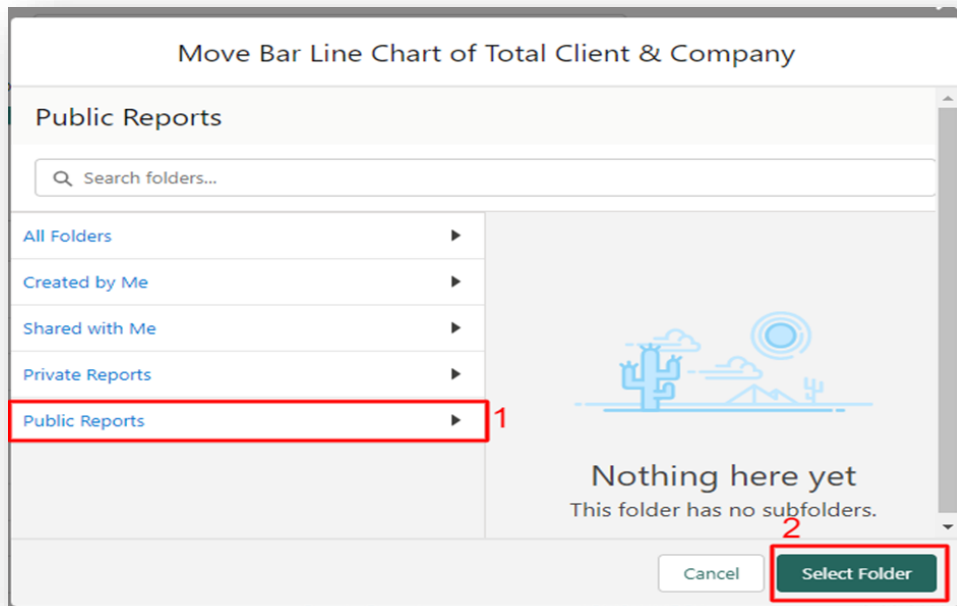


For the Reports section, there is only an “Administrator” who has the right to give permissions to a standard user. By default, only Admin users have the right to view the reports.

Admin User has to put reports into the “Public” folder to give rights to the standard user. Admin users have to follow the steps below:



- Go to the Reports from Nav bar, there is an option for each report to move it to the “Public” folder.
- Click on “Move”, select “Public Reports” and then click on “Select Folder” button as shown below

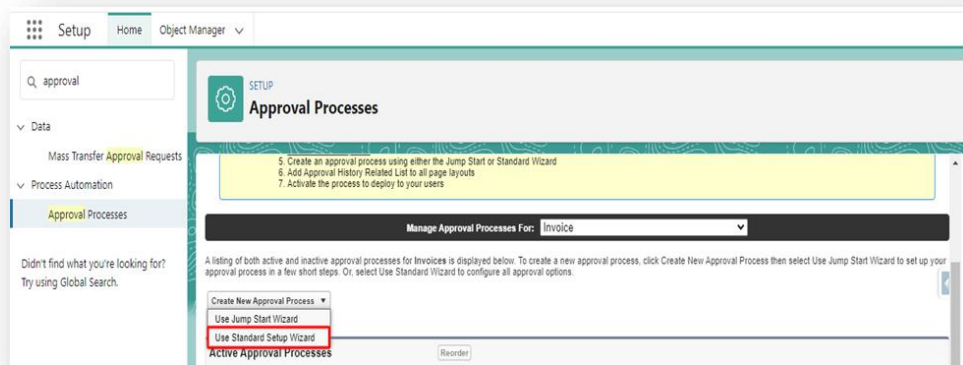


2.2.3 Approval Process:

Users have to follow the steps below for the approval process:

Step 1:

- Setup -> Approval Processes -> Manage Approval Processes For: Invoice (Custom Object)
- Create New Approval Process -> Use Standard Setup Wizard



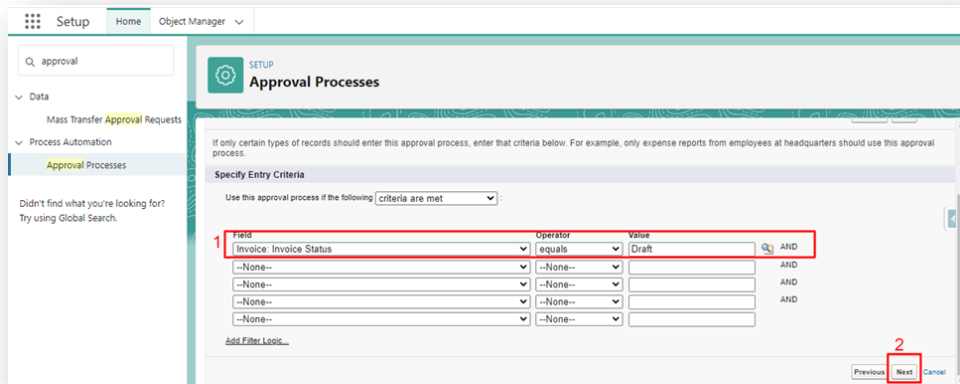
- Enter Process name and description and press “Next” button.

- **Step 2:**

In this step, the user has to specify entry criteria, If criteria are met then select the values as shown below:

- Field -> Invoice: Invoice Status
- Operator -> equals
- Value -> Draft

Then Press “Next”.



Setup Home Object Manager

approval

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

Didn't find what you're looking for?
Try using Global Search.

SETUP

Approval Processes

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met

Field	Operator	Value	
Invoice: Invoice Status	equals	(Draft)	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

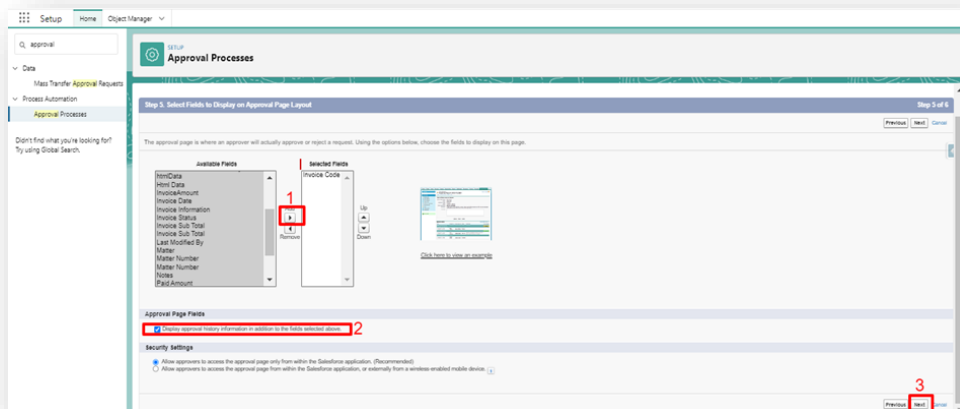
Add Filter Logic...

Previous Next Cancel

Then, in steps 3 & 4 press “Next”.

• Step 5:

In this step, the user has to select “fields to display on the approval page”, Select All Invoice Custom Fields from Available Fields and Add to Selected Fields. And press “Next”.



Setup Home Object Manager

approval

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

Didn't find what you're looking for?
Try using Global Search.

SETUP

Approval Processes

Step 5: Select Fields to Display on Approval Page Layout

The approval page is where an approval will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields	Selected Fields
ItemData	Invoice Code
Item Code	
InvoiceAccount	
Invoice Date	
Invoice Information	
Invoice Status	
Invoice Sub Total	
Invoice Sub Total	
Last Modified By	
Master Number	
Master Number	
Notes	
Paid Amount	

Approval Page Fields

☒ Display approval history information in addition to the fields selected above

Security Settings

☒ Allow approvals to access the approval page only from within the Salesforce application. (Recommended)

☐ Allow approvals to access the approval page from within the Salesforce application, or externally from a screen-enabled mobile device.

Previous Next Cancel

- **Step 6:**

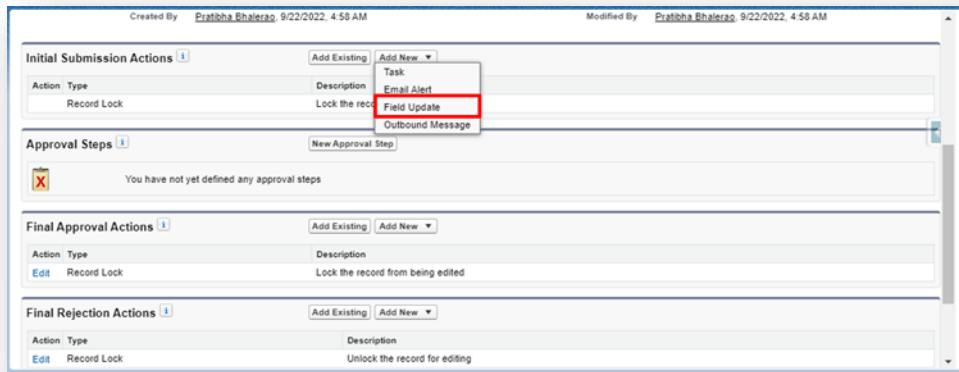
Here select Initial Submitters as below:

Submitter Type Search: Owner Then go to “Submission Settings” and Select -> Allow submitters to recall approval requests. And click “Save”.

- **Step 7:**

In this step, the user has to select “Initial Submission Actions”. Follow below actions:

- Add New -> Field Update ->
- Name -> Changing Status to Submit for Approval



Created By: Pratibha Bhalerao, 9/22/2022, 4:58 AM Modified By: Pratibha Bhalerao, 9/22/2022, 4:58 AM

Initial Submission Actions [Add Existing](#) [Add New](#)

Action	Type	Description
	Record Lock	Lock the record

Approval Steps [New Approval Step](#)

 You have not yet defined any approval steps

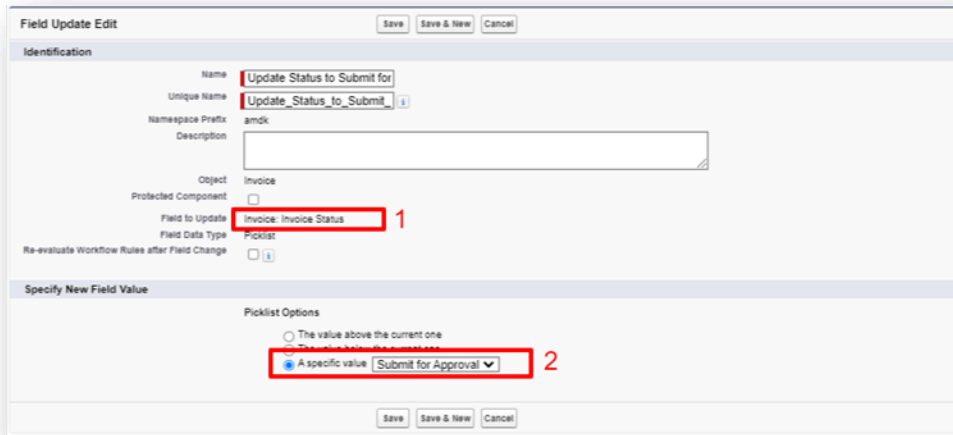
Final Approval Actions [Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions [Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

- Field to Update -> Invoice Status
- Specify New Field Value
- Select -> A specific value -> Submit for Approval



Field Update Edit [Save] [Save & New] [Cancel]

Identification

Name: Update Status to Submit for
 Unique Name: Update_Status_to_Submit
 Namespace Prefix: amdk
 Description:
 Object: Invoice
 Protected Component: ☐
 Field to Update: Invoice: Invoice Status **1**
 Field Data Type: Picklist
 Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Picklist Options

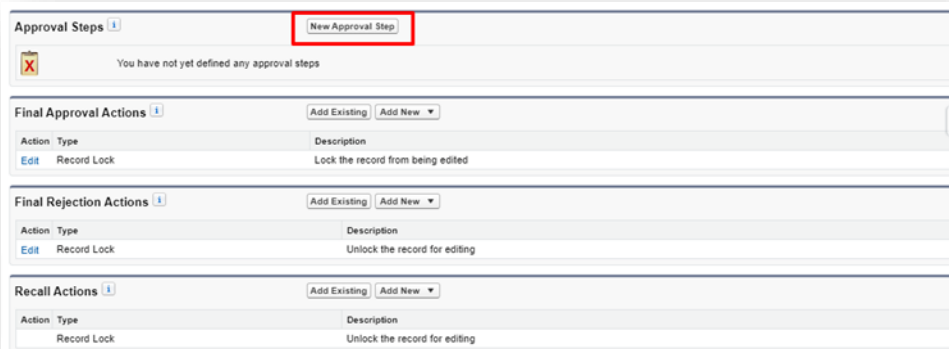
☐ The value above the current one
☒ A specific value [Submit for Approval ▼] **2**

[Save] [Save & New] [Cancel]

And then click on “Save”.

- **Step 8:**

Next step is “Approval Steps”. Click on “New Approval Step”.



Approval Steps [New Approval Step]

You have not yet defined any approval steps

Final Approval Actions [Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

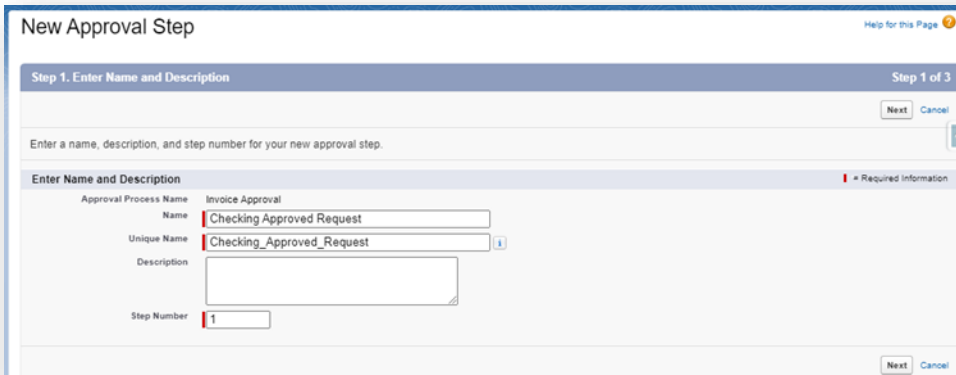
Final Rejection Actions [Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions [Add Existing] [Add New ▼]

Action	Type	Description
	Record Lock	Unlock the record for editing

Enter “Name” and “Description” and Press “Next” button.

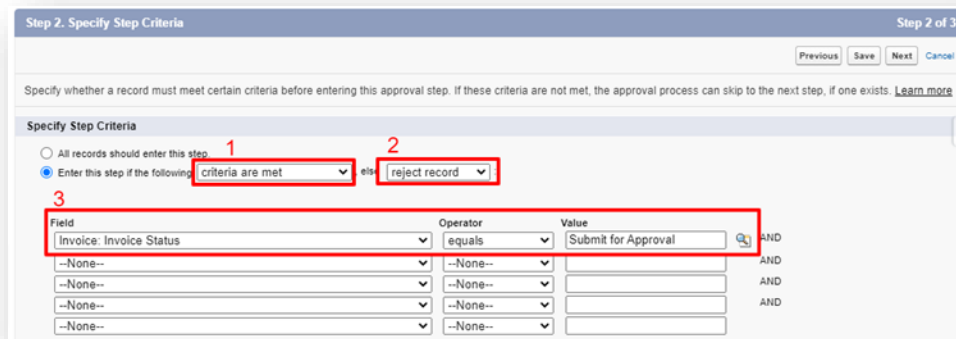


Enter this step if the following -> criteria are met, else -> reject record:

Field -> Invoice: Invoice Status

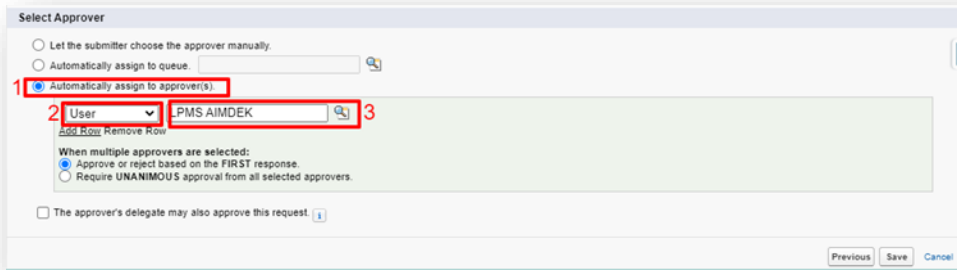
Operator -> equals

Value -> Submit for Approval



And then press “Next”.

Then Select “Approver” as shown in the screenshot below, select option given as per requirements and then click “Save”.



Select Approver

☐ Let the submitter choose the approver manually.
☐ Automatically assign to queue.
☒ Automatically assign to approver(s)

2 User 3

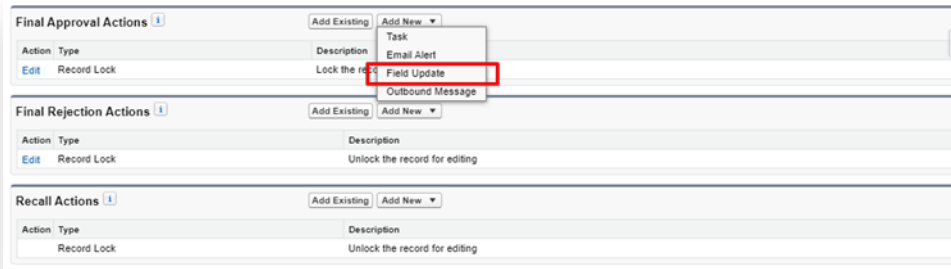
When multiple approvers are selected:

☒ Approve or reject based on the FIRST response.
☐ Require UNANIMOUS approval from all selected approvers.

☐ The approver's delegate may also approve this request.

- **Step 9:**

This step is used for “Final Approval actions”



Final Approval Actions

Action Type	Description
Record Lock	Lock the record
Task	Task
Email Alert	Email Alert
Field Update	Field Update
Outbound Message	Outbound Message

Final Rejection Actions

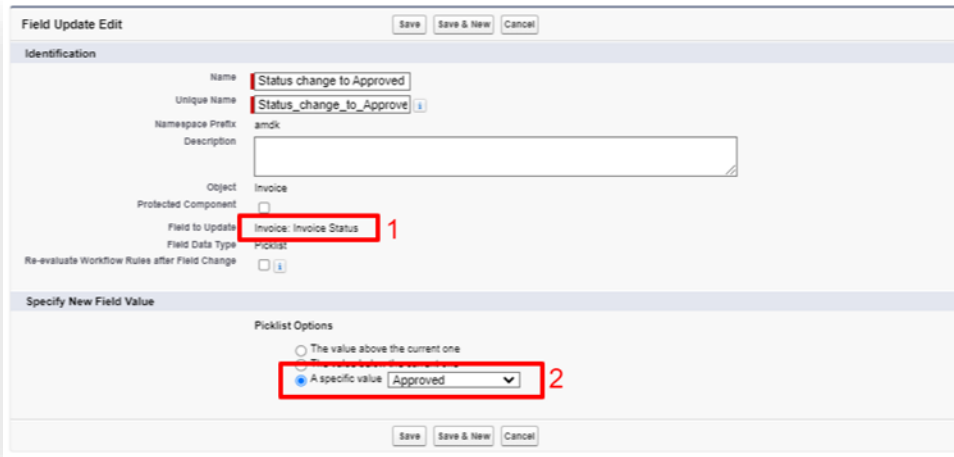
Action Type	Description
Record Lock	Unlock the record for editing

Recall Actions

Action Type	Description
Record Lock	Unlock the record for editing

Follow the actions below in sequence to complete this step:

- Add New -> Field Update ->
- Name -> Changing Status to Approved
- Field to Update -> Invoice Status
- Specify New Field Value
- Select -> A specific value -> Approved



Field Update Edit [Save] [Save & New] [Cancel]

Identification

Name: Status change to Approved
 Unique Name: Status_change_to_Approve
 Namespace Prefix: amdk
 Description:
 Object: Invoice
 Protected Component: ☐
 Field to Update: Invoice: Invoice Status **1**
 Field Data Type: Picklist
 Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Picklist Options

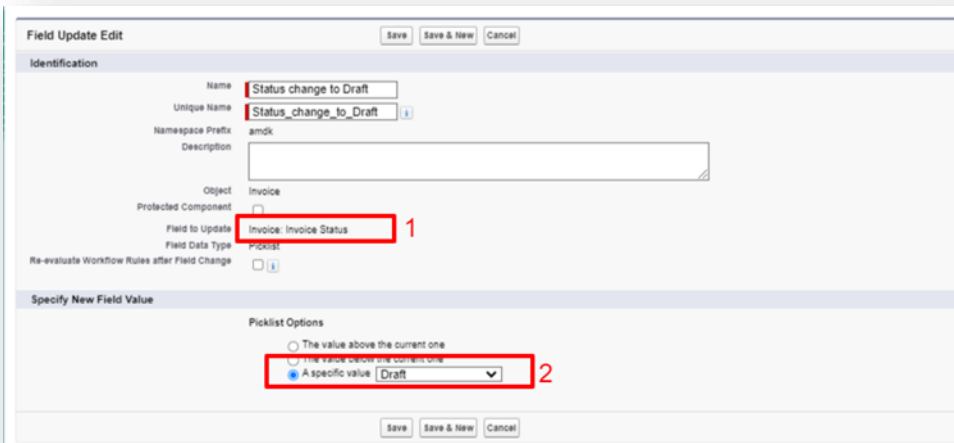
☐ The value above the current one
☒ A specific value: Approved **2**

[Save] [Save & New] [Cancel]

• Step 10:

This step defines final rejection actions as below:

- Add New -> Field Update ->
- Name -> Changing Status to Draft
- Field to Update -> Invoice Status
- Specify New Field Value
- Select -> A specific value -> Draft



Field Update Edit [Save] [Save & New] [Cancel]

Identification

Name: Status change to Draft
 Unique Name: Status_change_to_Draft
 Namespace Prefix: amdk
 Description:
 Object: Invoice
 Protected Component: ☐
 Field to Update: Invoice: Invoice Status **1**
 Field Data Type: Picklist
 Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Picklist Options

☐ The value above the current one
☒ A specific value: Draft **2**

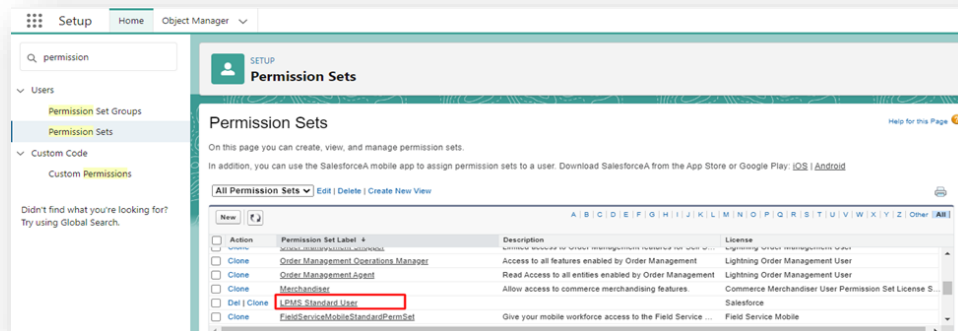
[Save] [Save & New] [Cancel]

Now click on “Save” and then click on “Activate Process”.

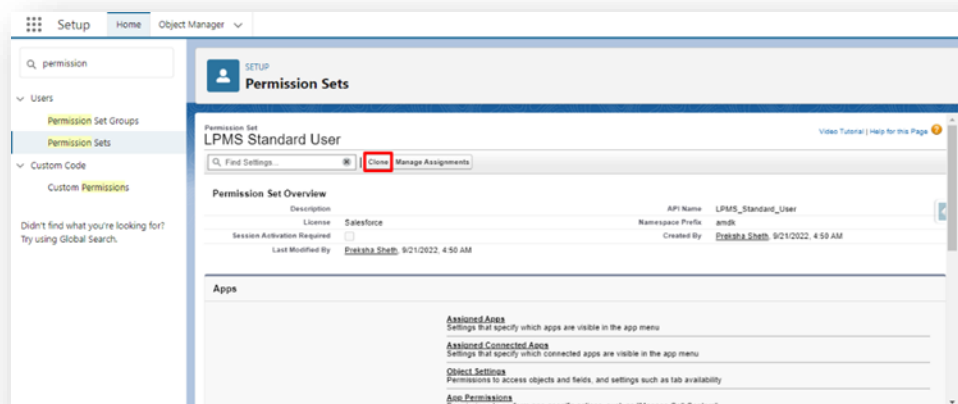
2.2.3 Files Tab Flows Permission

User has to give “Files Tab” flow permission in order to use it.

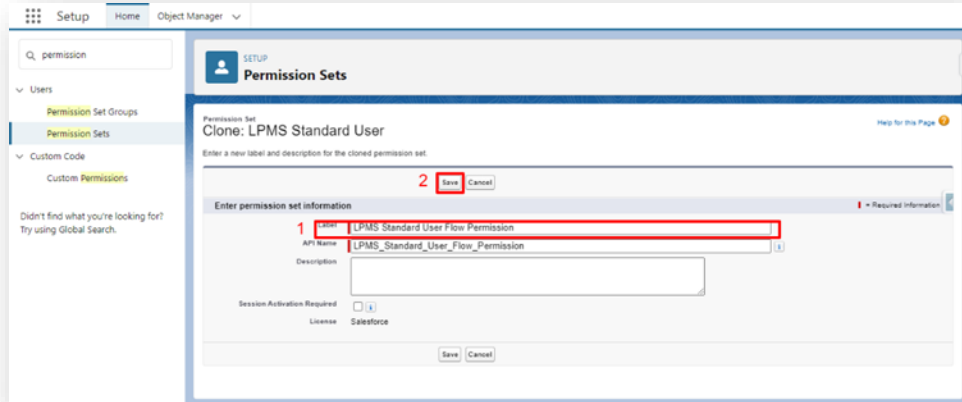
- Search 'permission set' in quick find in setup
- Select AttorneyOnline Standard User'



Then click on “Clone” button.



Then give valid name and “Save”.



Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Set Clone: LPMS Standard User

Enter a new label and description for the cloned permission set.

Enter permission set information

1 LPMS Standard User Flow Permission

API Name LPMS_Standard_User_Flow_Permission

Description

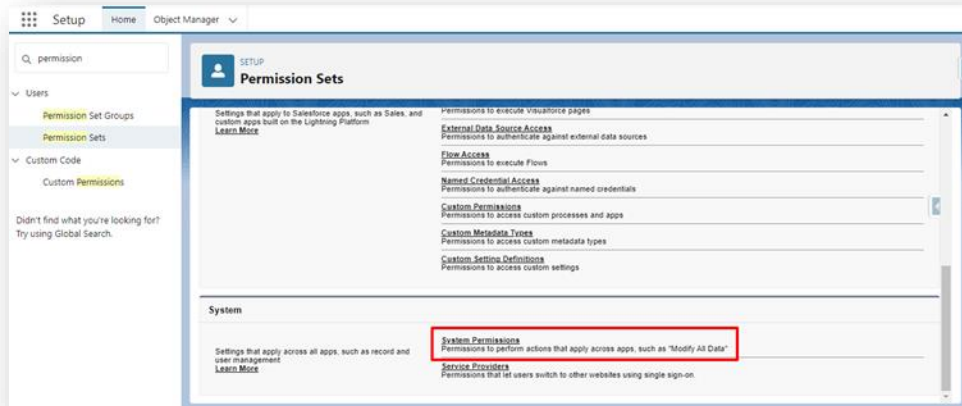
Session Activation Required

License Salesforce

2 Save Cancel

Save Cancel

Then open the cloned permission set and go to system permission.



Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Sets

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Named Credential Access

Permissions to authenticate against named credentials

Custom Permissions

Permissions to access custom processes and apps

Custom Metadata Types

Permissions to access custom metadata types

Custom Settings Definitions

Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management. [Learn More](#)

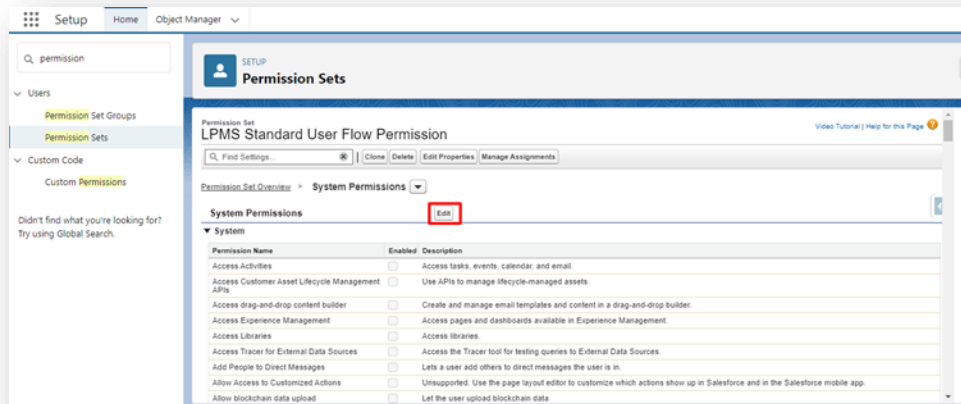
System Permissions

Permissions to perform actions that apply across apps, such as "Modify All Data"

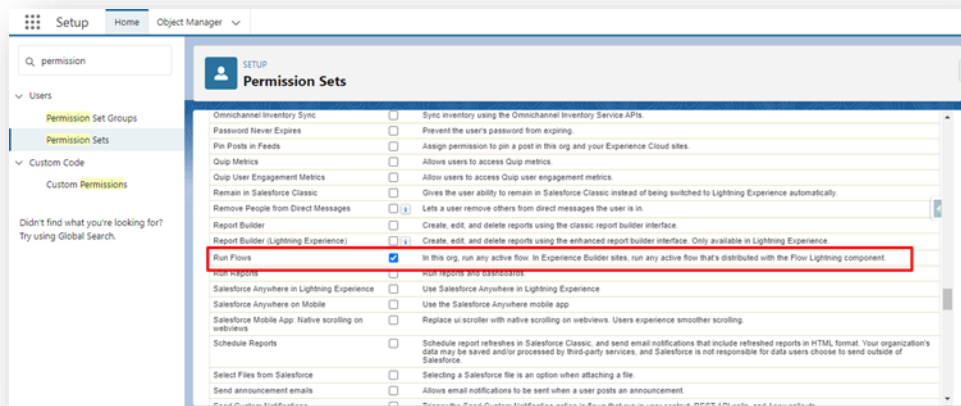
Service Providers

Permissions that let users switch to other websites using single sign-on.

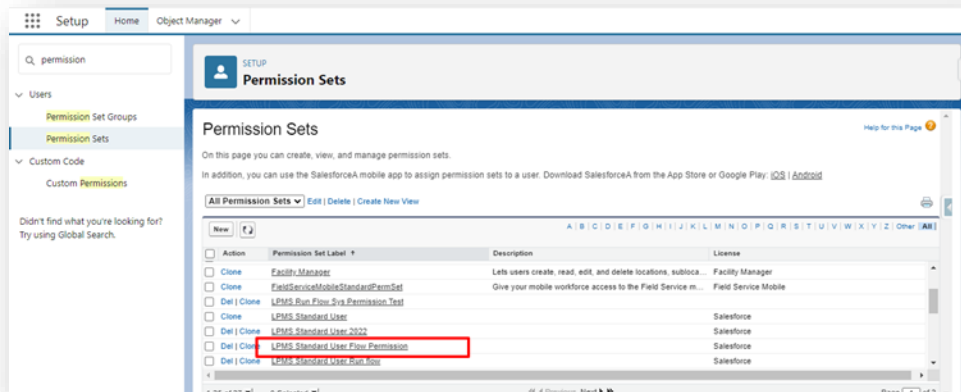
Click on the Edit button and the next screen will be displayed below:



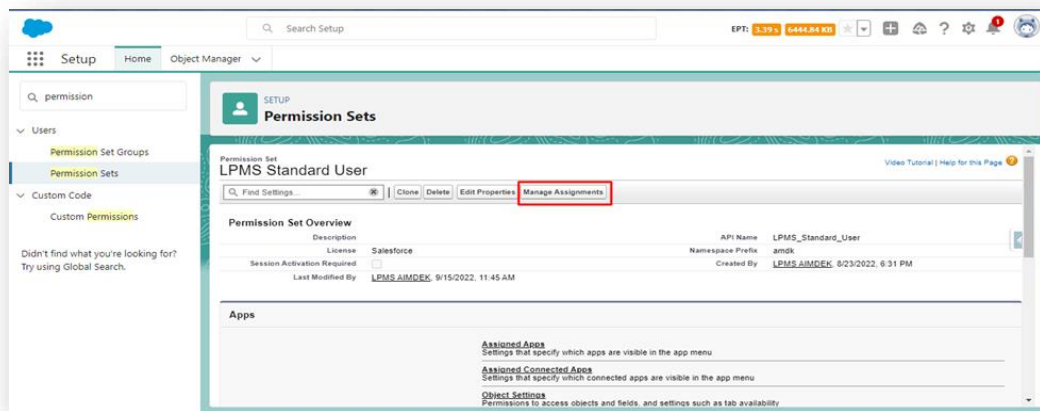
Then tick the 'Run Flow' checkbox in the list and save it.



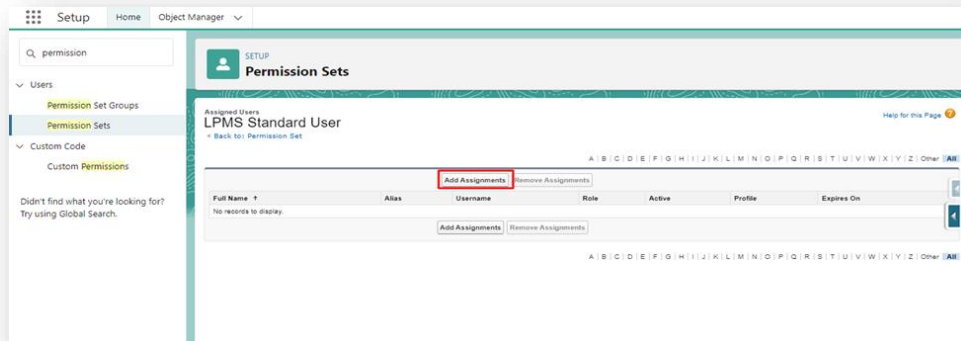
Then select Cloned Permission set



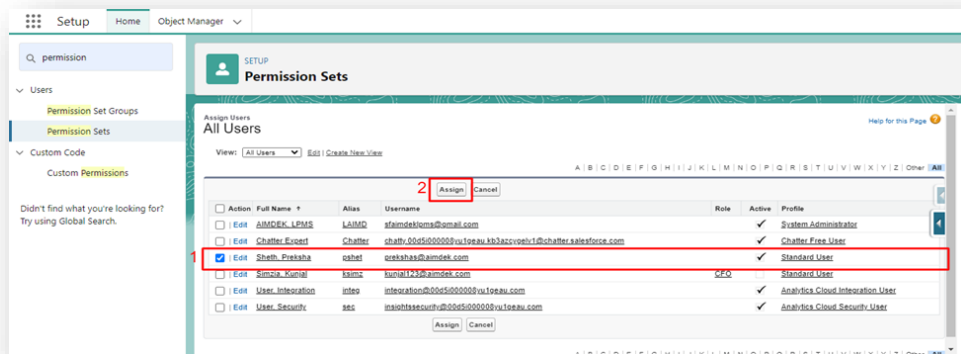
Select 'Manage Assignment'



Select 'Add Assignment'



Select the standard user you want to Assign and save.

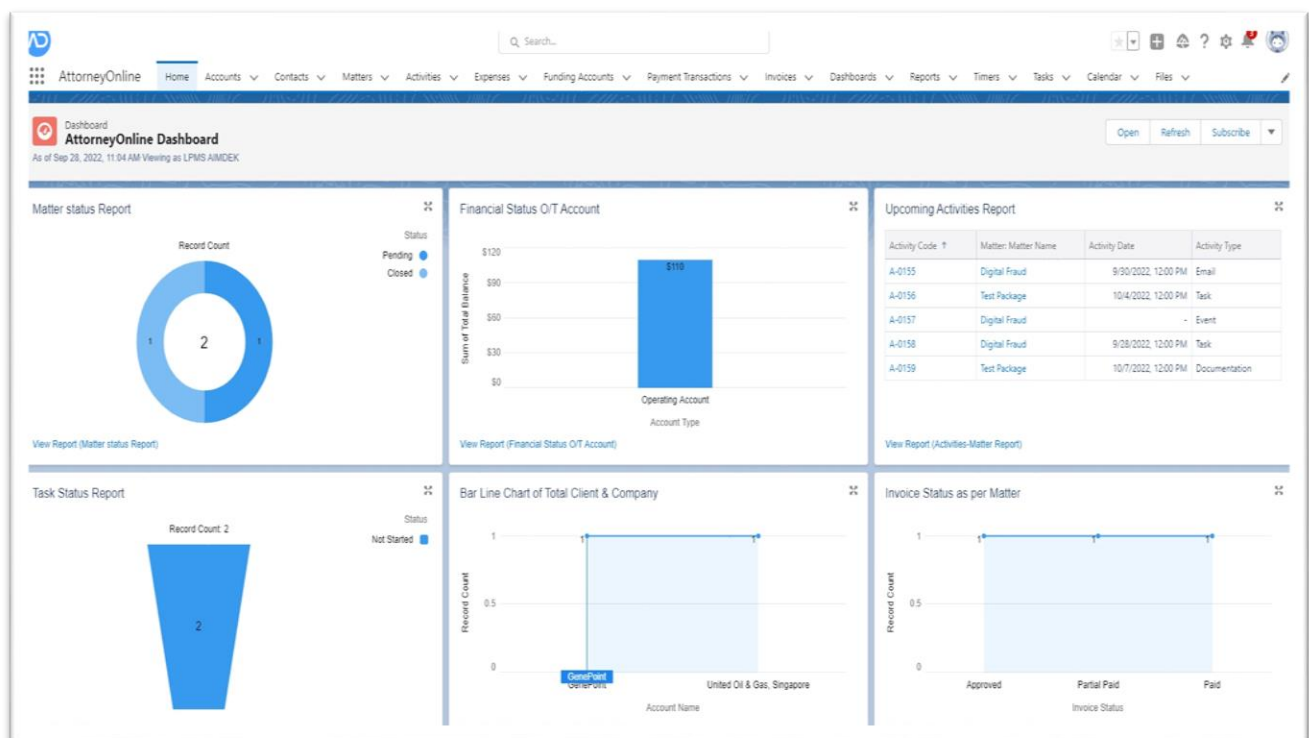


Only System Administrator can assign the permission set to the user.

3. Web application

AttorneyOnline can be accessed by using a web browser. The user just needs to log into its Salesforce organization and look for the AttorneyOnline application in the Force.com menu.

3.1 Home Screen



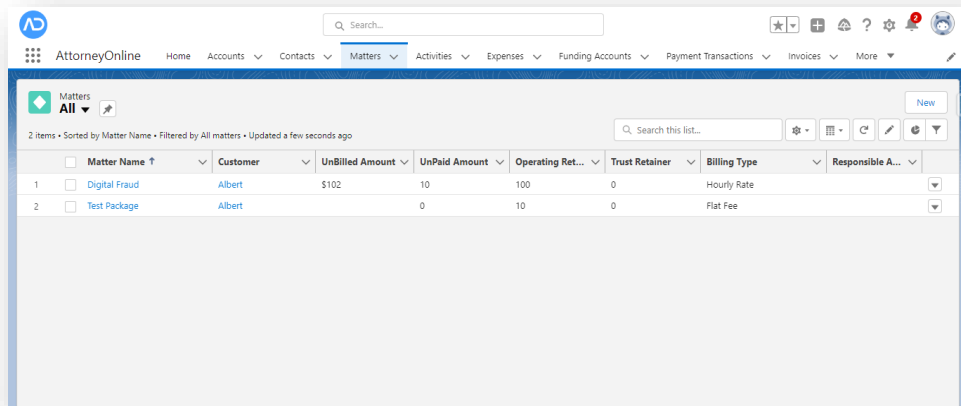
This dashboard includes several essential pieces of information for the entire system. This shows the following sections on this tab filtered for the user that is logged in

- *Matter Status Report* - Shows recent matters count in graphical form as per their status wise either “Open”, “Pending” or “Close”.
- *Financial O/T account* - Shows Bar chart for Trust account balance.

- *Activity Feed* - Shows upcoming activities report of the matters.
- *Tasks* - Shows total count of task status wise in graphical form.
- *Clients* – Shows total clients & companies in a line chart format along with company names and their record count.
- *Invoices Status* – It shows the current status of the invoice as “Draft”, “Approved”, “Partial Paid” and "Paid".

3.2 Matters

3.2.1 Matters Listing Page

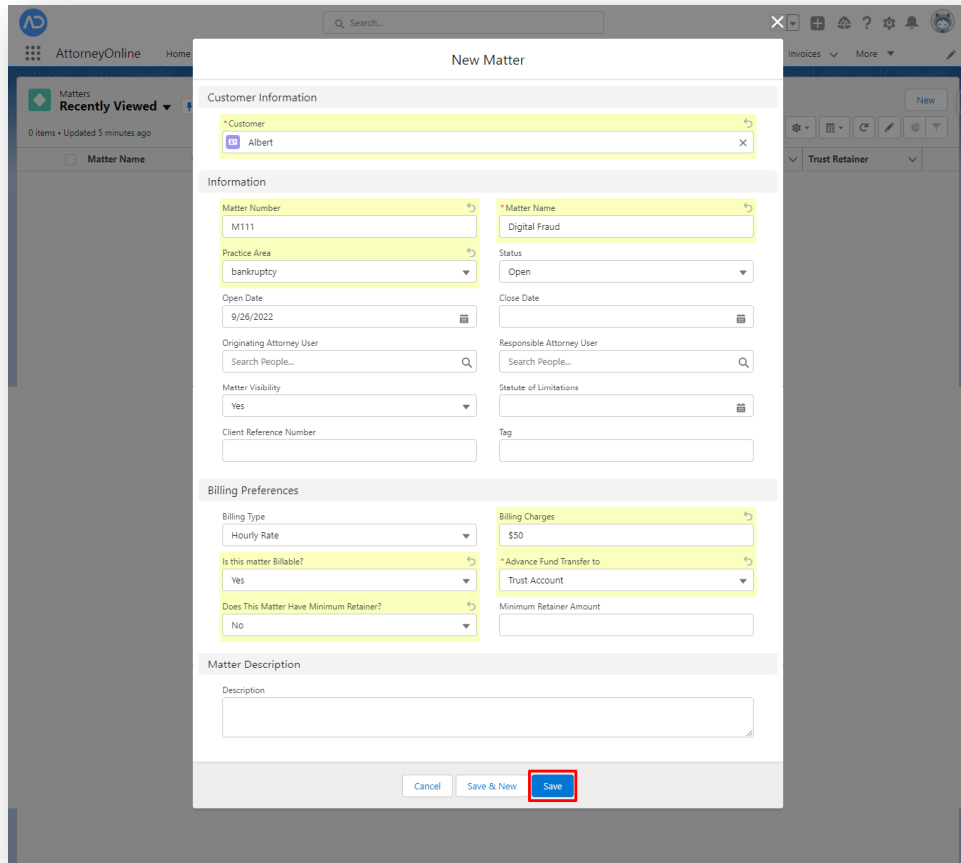


The screenshot shows the 'Matters' tab selected in the AttorneyOnline application. The interface includes a search bar, a table of matters, and a 'New' button. The table has columns for Matter Name, Customer, UnBilled Amount, UnPaid Amount, Operating Ret..., Trust Retainer, Billing Type, and Responsible A....

	Matter Name ↑	Customer	UnBilled Amount	UnPaid Amount	Operating Ret...	Trust Retainer	Billing Type	Responsible A...
1	☐ Digital Fraud	Albert	\$102	10	100	0	Hourly Rate	
2	☐ Test Package	Albert		0	10	0	Flat Fee	

When the matter tab is selected it shows by default a listing of recent matters, including search and a few more options.

3.2.2 Create Matter



The screenshot shows the 'New Matter' form in the AttorneyOnline system. The form is divided into four main sections: Customer Information, Information, Billing Preferences, and Matter Description. The 'Save' button at the bottom right is highlighted with a red box.

Customer Information

- *Customer: Albert

Information

- Matter Number: M111
- *Matter Name: Digital Fraud
- Practice Area: bankruptcy
- Status: Open
- Open Date: 9/26/2022
- Close Date:
- Originating Attorney User: Search People...
- Responsible Attorney User: Search People...
- Matter Visibility: Yes
- Statute of Limitations:
- Client Reference Number:
- Tag:

Billing Preferences

- Billing Type: Hourly Rate
- Billing Charges: \$50
- Is this matter Billable?: Yes
- *Advance Fund Transfer to: Trust Account
- Does This Matter Have Minimum Retainer?: No
- Minimum Retainer Amount:

Matter Description

Description:

Buttons: Cancel, Save & New, **Save**

There is an option at the top right for creating a “New” matter. The new matter creation page will ask for the details below:

- Customer Information.
- Information.
- Billing Preferences.
- Matter Description.

In the “Billing Preferences” section, there is an option to select “Billing Type”. By default, it is selected as “Hourly rate”, but the user has the option to choose other values like “Flat Fee” and “Contingency Fee”.



There are three different fee types below which are mostly used in creating matter and invoices:

Flat Fee: When a lawyer charges a specific or total fee. Mostly in simple cases like, example: creating a will, etc.

Contingency Fee: This is based on a percentage of the amount awarded in the case. If you lose the case the lawyer does not get a fee but pays some of the expenses.

Hourly Rate: When the lawyer charges the client for each hour. This option is used. When users don't enter any billing rate while creating an activity then it will take the billing rate defined in the matter's billing preferences.

3.2.3 Matter Details

The screenshot shows the 'Matter Details' form in the AttorneyOnline system. The form is titled 'Matter: Digital Fraud' and has tabs for 'Details', 'Billing', 'Files', and 'Time And Expenses'. The 'Details' tab is active, showing fields for 'Customer Information' (Customer: Albert), 'Information' (Matter Number: M111, Practice Area: Bankruptcy, Open Date: 9/26/2022), and 'Matter Name' (Digital Fraud). There are also fields for 'Status' (Open) and 'Close Date'. A 'Timer' section on the right has a 'Timer Activity Type' dropdown, a 'Description' field, and a timer display showing '00:00' with 'Start', 'Reset', and 'Save Timer' buttons. The form includes 'Cancel' and 'Save' buttons at the bottom. The footer shows 'Created By: LPMS AIMDEK, 9/26/2022, 6:52 PM' and 'Last Modified By: LPMS AIMDEK, 9/26/2022, 6:52 PM'.

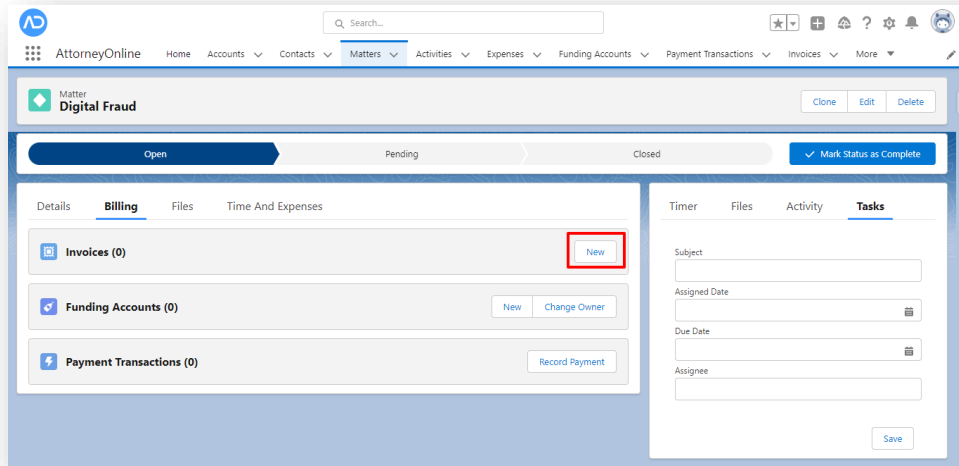
Upon clicking on a particular matter from the listing page, this page will be displayed along with all the detailed information about the selected matter. The Details tab consists of some more sub-sections as below:

- Details
- Billing
- Files
- Time and Expenses
- Timer
- Activity

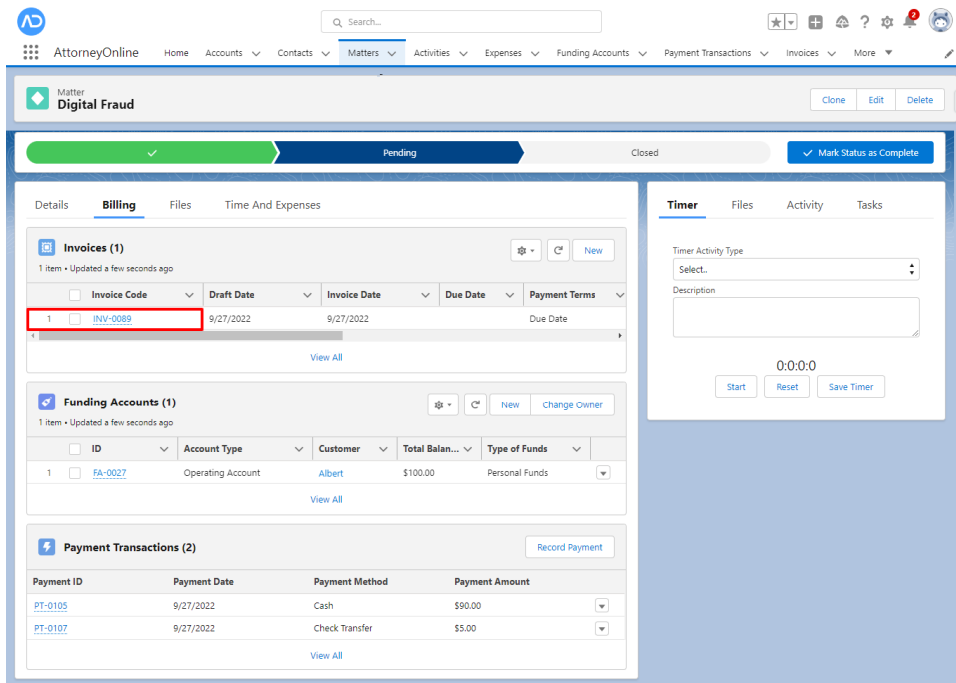
- Details

Here the status of the matter can also be viewed as either “open”, “Pending” or “Closed”. There is a button on the right side to “Mark status as complete” which is used to make status as “Complete” at any stage.

○ Billing



The billing tab lists all the Invoices, Funding accounts, and Payment transactions made against the invoices. The invoice amount is calculated using billable time entries and expenses logged.





Once the User clicks on any of the invoices, it will open a detailed view of the invoice as shown below:

A screenshot of the AttorneyOnline web application showing the detailed view of an invoice. The top navigation bar includes a search bar and various menu items like Home, Accounts, Contacts, Matters, Activities, Expenses, Funding Accounts, Payment Transactions, Invoices, and More. The main header shows the invoice ID 'INV-0089' and a 'Submit for Approval' button highlighted with a red box. Below the header is a progress bar with stages: Draft, Submit for Approval, Approved, Sent, Partial Paid, Overdue, and Paid. The 'Details' tab is active, showing sections for Information, Invoice Status, Invoice Balances, and Invoice Details. The 'Related' tab is also visible. The 'Information' section includes fields for Bill To Client (Albert), Matter Number, Description, Term Condition, Matter (Digital Fraud), Tags, and Notes. The 'Invoice Status' section shows Draft Date (9/27/2022), Invoice Date, Payment Terms, and Due Date. The 'Invoice Balances' section shows Invoice Sub Total (102), Adjustment Amount (2), Final Invoice Amount After Adjustment (\$100.00), Paid Amount (0), and Payment Dues (\$100.00). The 'Invoice Details' section shows Invoice Information, Customer (Albert), Matter (Digital Fraud), Invoice Amount (100), Status (Draft), Created By (LPMS AIMDEK), and Last Modified By (LPMS AIMDEK).

Information	
Bill To Client	Albert
Matter Number	
Description	
Term Condition	
Matter	Digital Fraud
Tags	
Notes	

Invoice Status	
Draft Date	9/27/2022
Invoice Date	
Payment Terms	
Due Date	

Invoice Balances	
Invoice Sub Total	102
Adjustment Amount	2
Final Invoice Amount After Adjustment	\$100.00
Paid Amount	0
Payment Dues	\$100.00

Invoice Details	
Invoice Information	
Customer : Albert Matter : Digital Fraud Invoice Amount : 100 Status : Draft	
Created By	LPMS AIMDEK, 9/27/2022, 12:29 PM
Last Modified By	LPMS AIMDEK, 9/27/2022, 12:29 PM

This includes sections like information, invoice status, invoice balances, and invoice details.

There is another section called “Related”, There are options at the top right side like “Edit”, “Delete” and “Clone”. which shows below details for the invoice:



[AttorneyOnline](#)
[Home](#)
[Accounts](#)
[Contacts](#)
[Matters](#)
[Activities](#)
[Expenses](#)
[Funding Accounts](#)
[Payment Transactions](#)
[Invoices](#)
[More](#)

Invoice

INV-0089

Edit Delete Clone

Partial Paid

Overdue

Paid

Details

Related

Invoice Line Items (3)

Add Items

ID	Activity	Payment Status	Hours / Qty
ILU-0131	Email	Paid	2
ILU-0134	Documentation	Paid	1
ILU-0135	Expenses	Partially Paid	1

View All

Invoice Adjustments (1)

IA-0056	Discount	SubTotal	Amount

View All

Invoice Payments (2)

New

ID	Payment	Payment Amount
IP-0121	PT-0105	\$90.00
IP-0123	PT-0107	\$5.00

View All

Notes & Attachments (0)

Upload Files

Upload Files

Or drop files

Approval History (2)

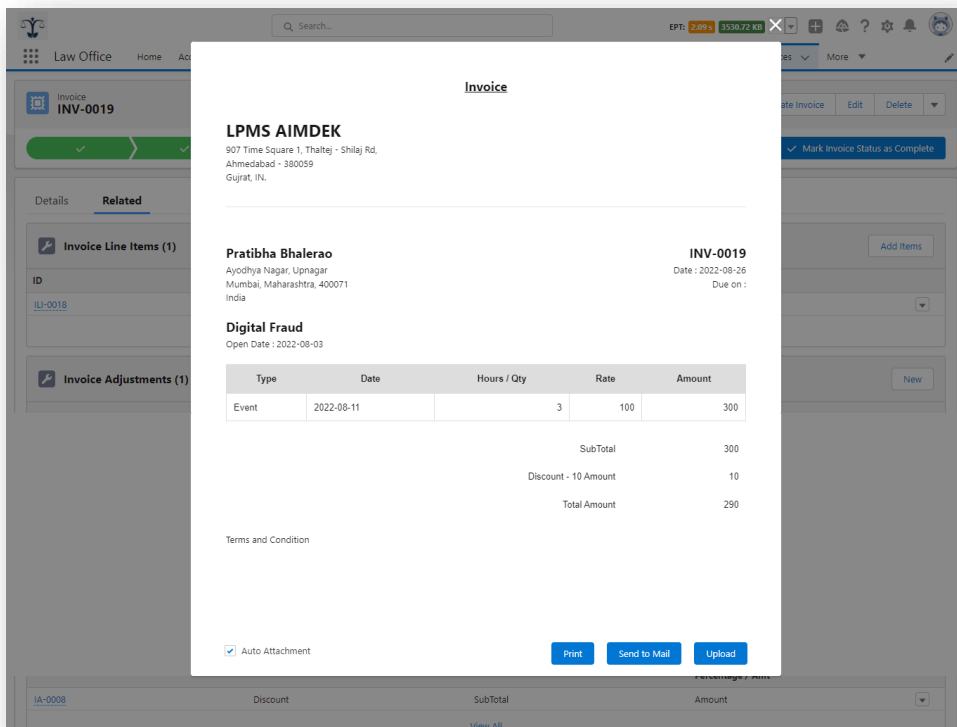
Step Name	Date	Status	Assigned To
Checking Approved Request	9/27/2022, 12:31 PM	Approved	LPMS AIMDEK
Approval Request Submitted	9/27/2022, 12:30 PM	Submitted	LPMS AIMDEK

View All

Initially, Invoice will be in the “Draft” state. There are other stages after “draft” as follows: “Submit for Approval”, “Approved”, “Sent”, “Partially Paid”, “Overdue” and “Paid”. There is a button at the top right for “Submit for Approval”. Clicking on this button will push the invoice to the “Approval History” section at bottom of the page.

Admin user has permission to “Approve”, “Reject”, “Reassign” and “Recall” the invoice. As soon as the admin user presses on the “Approve” button, the invoice is changed to the App “Approved” state and there is an option at the top right corner appeared called “Generate Invoice”.

“Generate Invoice” will open a new window showing full invoice with the option to “Print”, “Send to Mail” and “Upload”.



Invoice

LPMS AIMDEK
907 Time Square 1, Thaltej - Shilaj Rd,
Ahmedabad - 380059
Gujarat, IN.

Pratibha Bhalerao
Ayodhya Nagar, Upnagar
Mumbai, Maharashtra, 400071
India

INV-0019
Date : 2022-08-26
Due on :

Digital Fraud
Open Date : 2022-08-03

Type	Date	Hours / Qty	Rate	Amount
Event	2022-08-11	3	100	300
SubTotal				300
Discount - 10 Amount				10
Total Amount				290

Terms and Condition

☒ Auto Attachment

[Print](#) [Send to Mail](#) [Upload](#)

○ Invoice

To create a new invoice, follow the steps below:

1. Click on the new button on top right corner of the “Invoices” section.

2. It will open a new window as below:

New Invoice

Invoice Information

* Matter

Payment Terms

Notes

Customer

Description

Terms & Condition

Invoice Line Items Information

☒	ILI-0131		1	40	40
☐	ILI-0132	Call for matter discussion	0.0333333333333333	50	1.67
☐	ILI-0133		2	50	100
☒	ILI-0134		1	50	50
☒	ILI-0135	Travelling	1	12	12

Total Amount: 102\$

Invoice Adjustment Information

Apply Adjustment To

Percent / Amount

Adjustment Type

Value

Final Invoice Amount

Invoice Amount

Adjustment Amount

Date : 2022-09-27

3. Click “Save” once you fill all the mandatory fields.

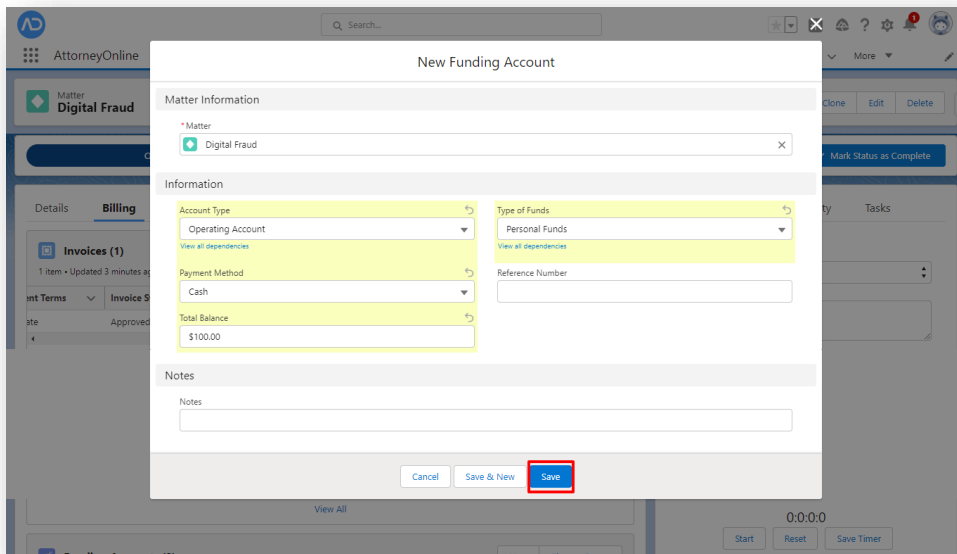
There is option to select different payment terms like “Due date”, “Due on receipt”, “Net 15 days”, “Net 30 days” and “Net 60 days”.

Invoice Adjustment Information: This section allows users to select an adjustment option for invoice amount. It will be “Subtotal”, “Time entries”, “Expenses” or “Flat Fees”.

Adjustment type can be selected from the multiple values as either “Discount”, “Interest” or “taxes”. Also, there is option to select value either in “Percentage” or “Amount”.

○ **Funding Accounts:**

Users can see here a list of funding accounts as well as create new funding account as shown in below window:



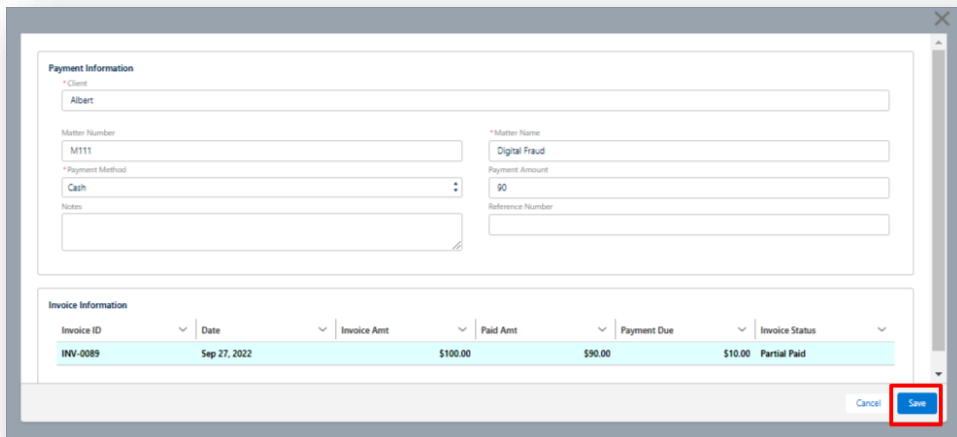
Here users can see a list of contacts for whom they want to create a funding account.

User has Facility to select account type (“Operating account”, “Trust Account”), also Type of funds they can specify based on the account type selected.

Upon clicking “Save” button, it will create a new funding account

○ **Payment Transactions:**

This section shows a list of payment transactions made for this matter. Here users can record new payment transactions as shown below:



Payment Information

* Client: Albert

Matter Number: M111

* Payment Method: Cash

Notes:

* Matter Name: Digital Fraud

Payment Amount: 90

Reference Number:

Invoice Information

Invoice ID	Date	Invoice Amt	Paid Amt	Payment Due	Invoice Status
INV-0089	Sep 27, 2022	\$100.00	\$90.00	\$10.00	Partial Paid

Cancel Save

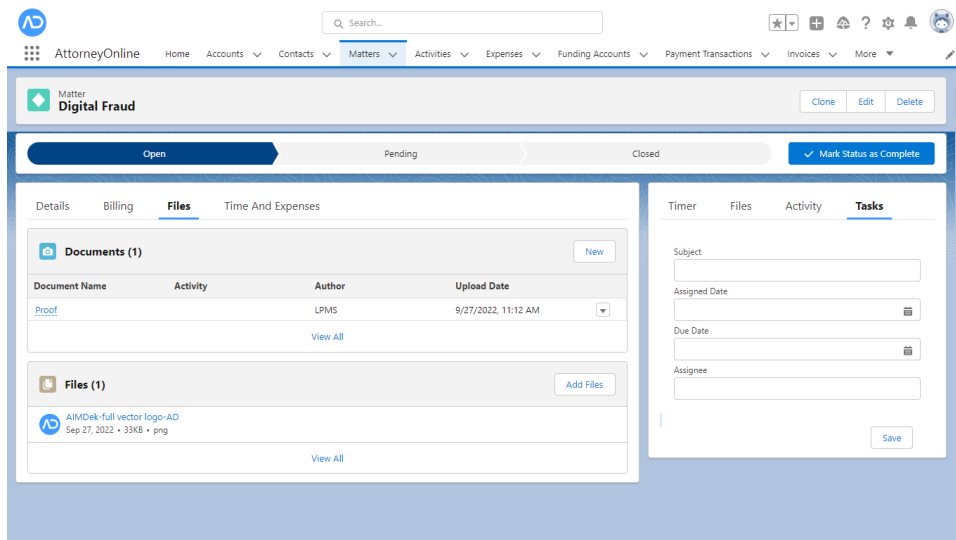
This section is used to record payment transactions made by customers. Here User can select “payment method” from the given payment options. There is a facility to enter notes and reference numbers for the payment transaction.

There is a sub-section below showing “Invoice Information” against which this particular transaction is being adjusted.

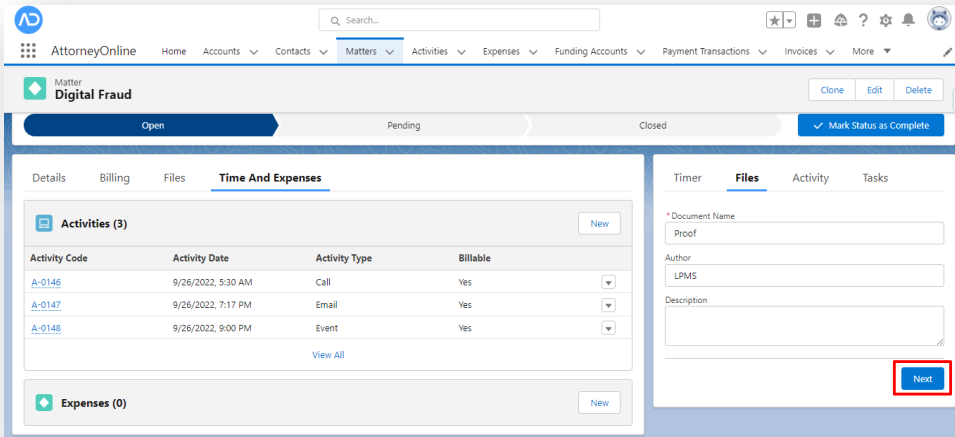
It shows the invoice amount, the total amount paid, the total amount due, and the invoice status. Whatever amount is entered into the “payment amount” box is adjusted against the “total amount due” and it shows the updated amount on the go.

○ Documents and Files

In the files section, there are two sub-parts that contain Documents and Files.



Here it shows documents listing, for the existing documents uploaded and the feature to upload new documents as shown below:



AttorneyOnline Home Accounts Contacts Matters Activities Expenses Funding Accounts Payment Transactions Invoices More

Matter Digital Fraud Clone Edit Delete

Open Pending Closed Mark Status as Complete

Details Billing Files **Time And Expenses**

Activities (3) New

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes
A-0147	9/26/2022, 7:17 PM	Email	Yes
A-0148	9/26/2022, 9:00 PM	Event	Yes

View All

Expenses (0) New

Timer Files Activity Tasks

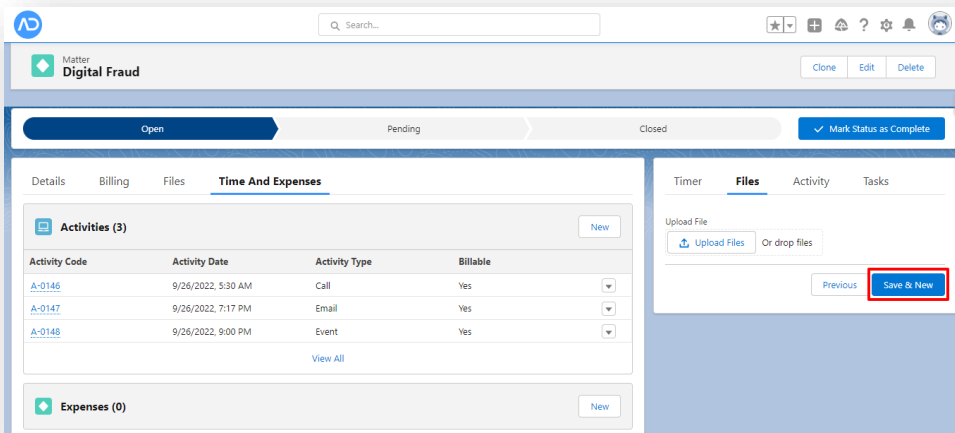
* Document Name
Proof

Author
LPMS

Description

Next

Here it shows files listing and option to upload new file as below:



AttorneyOnline Search...

Matter Digital Fraud Clone Edit Delete

Open Pending Closed Mark Status as Complete

Details Billing Files **Time And Expenses**

Activities (3) New

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes
A-0147	9/26/2022, 7:17 PM	Email	Yes
A-0148	9/26/2022, 9:00 PM	Event	Yes

View All

Expenses (0) New

Timer Files Activity Tasks

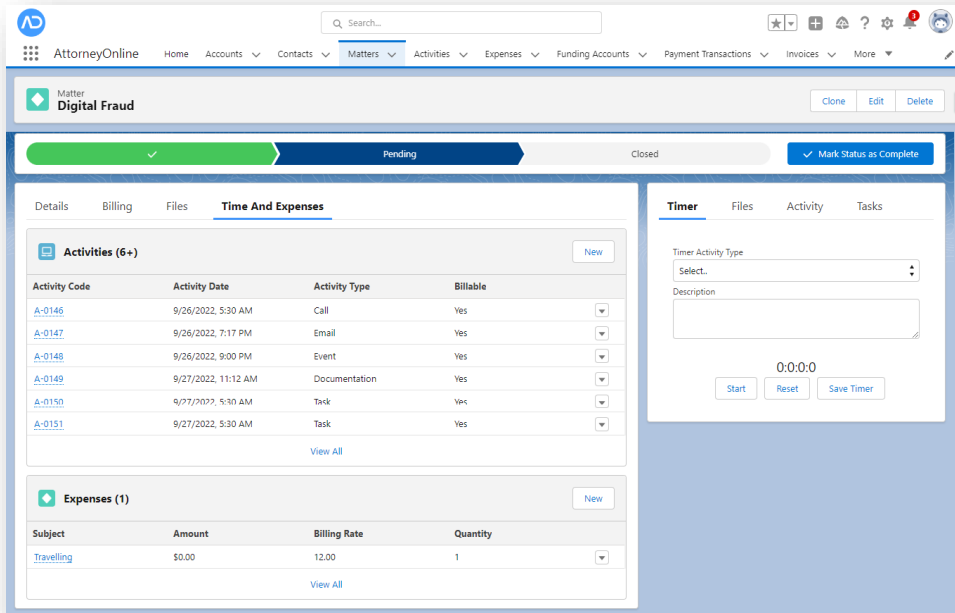
Upload File

Upload Files Or drop files

Previous Save & New

○ Time and Expenses

This section shows a list of activities and expenses. Activities list includes activity code, date, type and billable or not.



AttorneyOnline Home Accounts Contacts **Matters** Activities Expenses Funding Accounts Payment Transactions Invoices More

Matter **Digital Fraud** Clone Edit Delete

✓ Pending Closed ✓ Mark Status as Complete

Details Billing Files **Time And Expenses**

Activities (6+) New

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes
A-0147	9/26/2022, 7:17 PM	Email	Yes
A-0148	9/26/2022, 9:00 PM	Event	Yes
A-0149	9/27/2022, 11:12 AM	Documentation	Yes
A-0150	9/27/2022, 9:30 AM	Task	Yes
A-0151	9/27/2022, 5:30 AM	Task	Yes

[View All](#)

Expenses (1) New

Subject	Amount	Billing Rate	Quantity
Travelling	\$0.00	12.00	1

[View All](#)

Timer Files Activity Tasks

Timer Activity Type
Select...

Description

0:0:00

Start Reset Save Timer

To create a new activity, click on “New” button and it will open below window:

New Activity: Without Billing Status

Matter Information

* Matter
Digital Fraud

Information

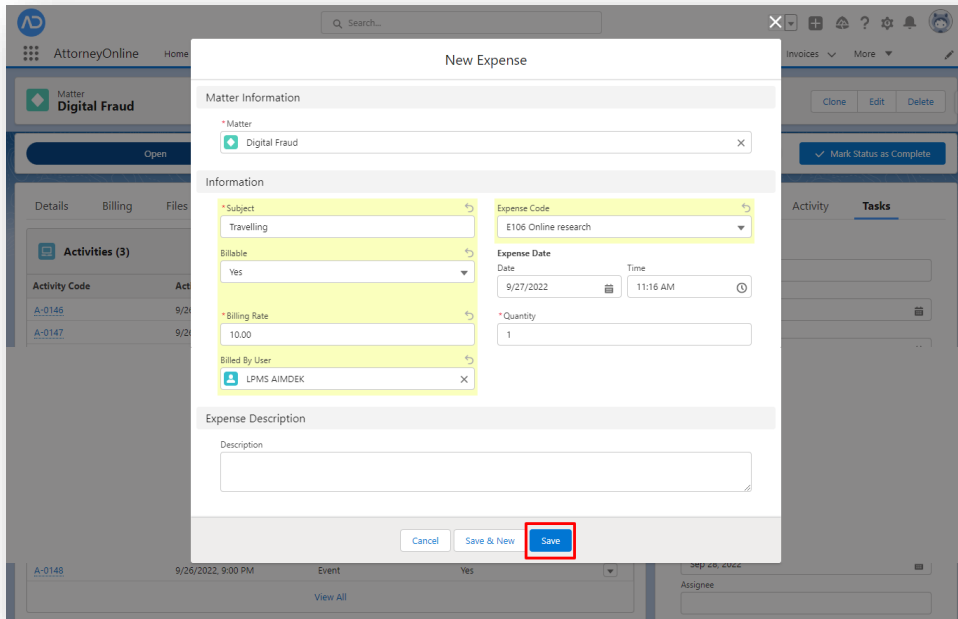
* Activity Type Email	Assign Activity Code A103 Draft/revise
Billable Yes	Activity Date Date: 9/27/2022 Time: 12:00 PM
Billing Rate \$11.00	Duration [Hour . Minute] 1.00
Billed By User LPMS AIMDEK	

Description

Description

Cancel Save & New Save

In the Expenses section, it shows a list of all expenses recorded as well as there is option to add “New” expense as below.



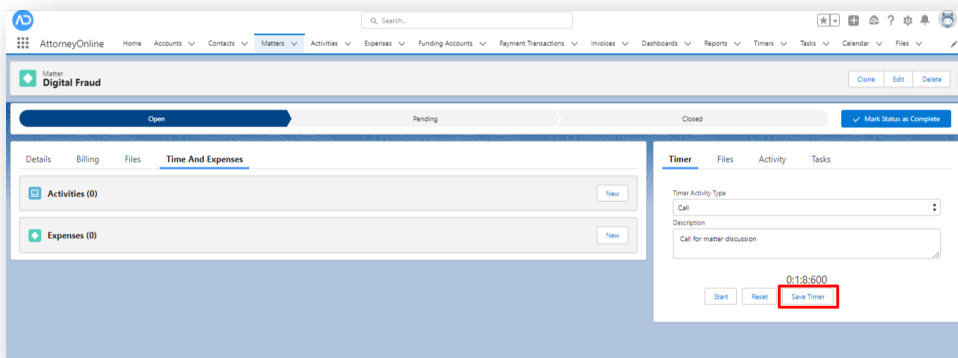
Users can define the expense code, subject, billable or not billable, quantity and rate, user for whom the expense is billed and description.

○ **Timer:**

This function defines activity timer for selected tasks or events.

Activity type will be Email, Call, Documentation, Task or Event

There is an option to start, stop and save timer as shown below:

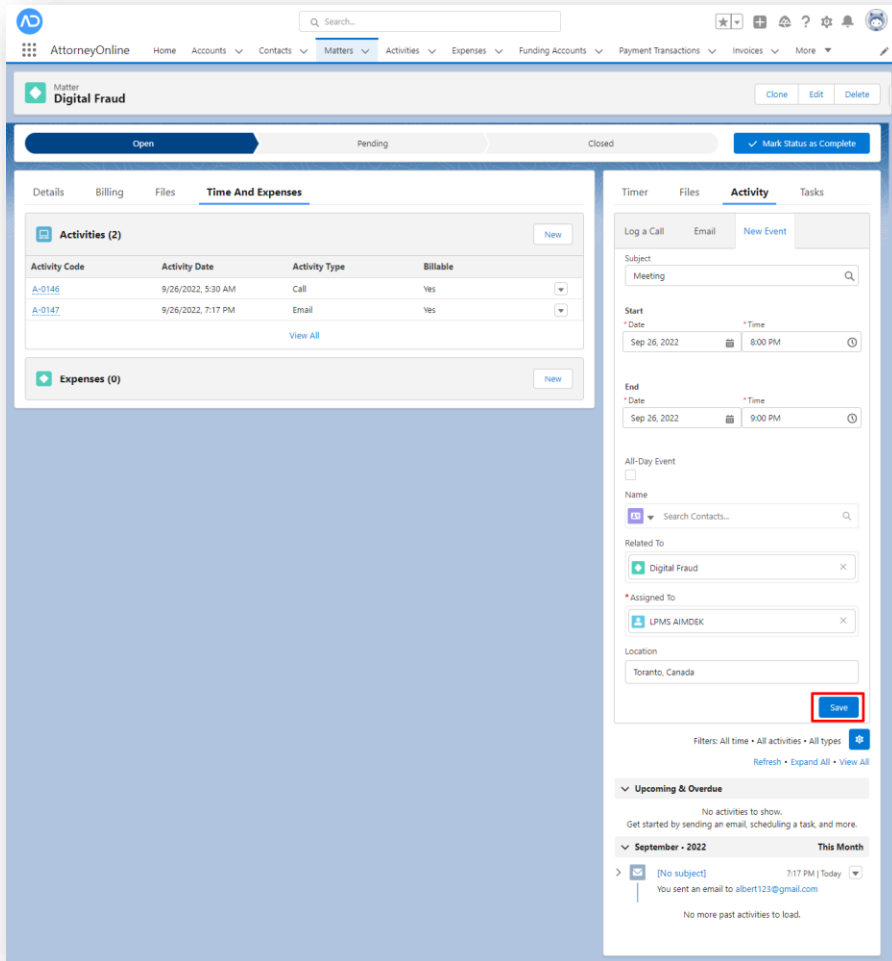


- **Activity**

In this section, it shows upcoming & overdue events and calls month wise. There is an option to create “New Event”, “Log a Call” and “Email”

New Event:

Users can create “new event” by entering subject, start and end dates. The other details like customer, matter and assigned to names will be auto-populated here and users can change it manually.

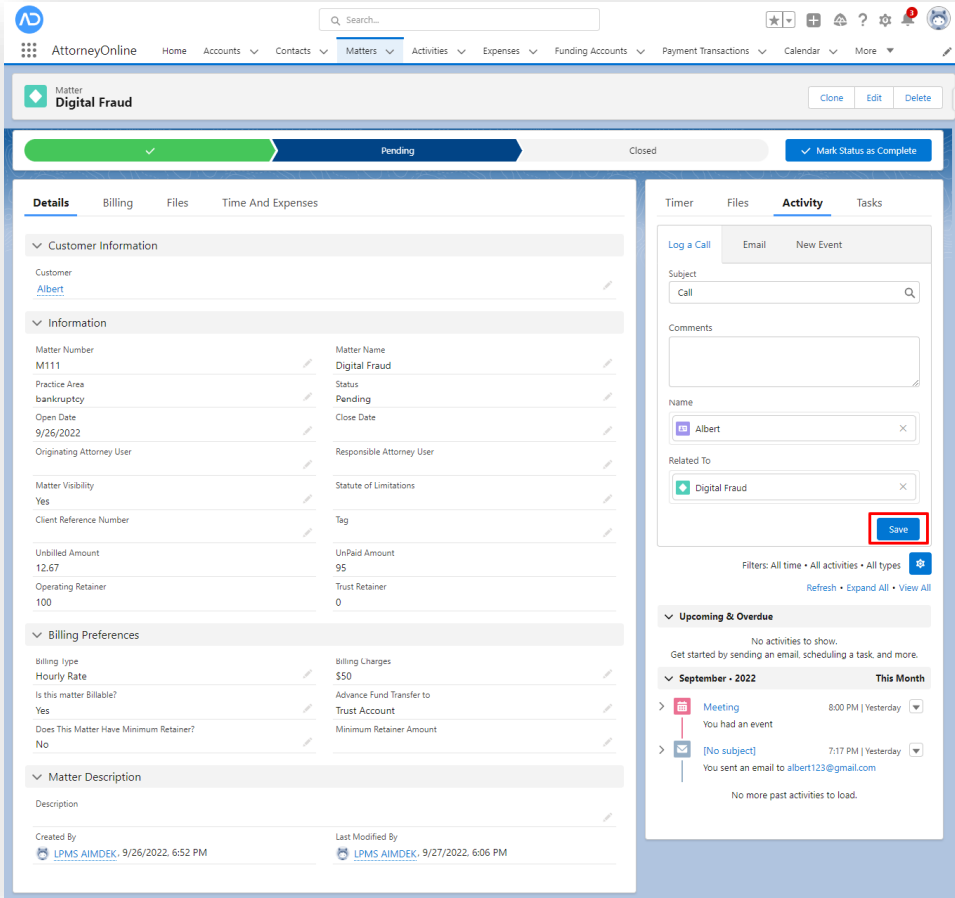


The screenshot shows the AIMDek AttorneyOnline interface. The top navigation bar includes links for Home, Accounts, Contacts, Matters, Activities, Expenses, Funding Accounts, Payment Transactions, Invoices, and More. The main header shows the matter name 'Digital Fraud' with buttons for Clone, Edit, and Delete. Below the header, there are tabs for Open, Pending, and Closed, with a 'Mark Status as Complete' button. The left sidebar has tabs for Details, Billing, Files, and Time And Expenses. The 'Time And Expenses' tab is active, showing a table of activities and a section for expenses. The right sidebar has tabs for Timer, Files, Activity, and Tasks. The 'Activity' tab is active, showing a form to log a call. The form includes fields for Subject (Meeting), Start Date (Sep 26, 2022), Start Time (8:00 PM), End Date (Sep 26, 2022), End Time (9:00 PM), All-Day Event (checkbox), Name (Search Contacts...), Related To (Digital Fraud), Assigned To (LPMS AIMDEK), and Location (Toronto, Canada). A red box highlights the 'Save' button at the bottom right of the form. Below the form, there are filters for All time, All activities, and All types, and a section for Upcoming & Overdue activities.

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes
A-0147	9/26/2022, 7:17 PM	Email	Yes

Log a call:

Users can log a call quickly using this window. Users enter comments and select the “contact” with whom they want to log the call. Then click on the “Save” button as shown below:



The screenshot displays the AttorneyOnline interface for a matter named "Digital Fraud". The top navigation bar includes links for Home, Accounts, Contacts, Matters, Activities, Expenses, Funding Accounts, Payment Transactions, Calendar, and More. The "Matters" tab is selected, showing a progress bar with "Pending" and "Closed" stages, and a "Mark Status as Complete" button.

The main content area is divided into two panels. The left panel, titled "Details", contains sections for Customer Information, Information, Billing Preferences, and Matter Description. The right panel, titled "Activity", includes a "Log a Call" button, a "Subject" field with the value "Call", a "Comments" text area, a "Name" dropdown menu with "Albert" selected, and a "Related To" dropdown menu with "Digital Fraud" selected. A red box highlights the "Save" button in the Activity panel.

Customer Information

Customer	Albert
----------	--------

Information

Matter Number	M111	Matter Name	Digital Fraud
Practice Area	bankruptcy	Status	Pending
Open Date	9/26/2022	Close Date	
Originating Attorney User		Responsible Attorney User	
Matter Visibility	Yes	Statute of Limitations	
Client Reference Number		Tag	
Unbilled Amount	12.67	UnPaid Amount	95
Operating Retainer	100	Trust Retainer	0

Billing Preferences

Billing Type	Hourly Rate	Billing Charges	\$50
Is this matter Billable?	Yes	Advance Fund Transfer to	Trust Account
Does This Matter Have Minimum Retainer?	No	Minimum Retainer Amount	

Matter Description

Description	
-------------	--

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

September - 2022

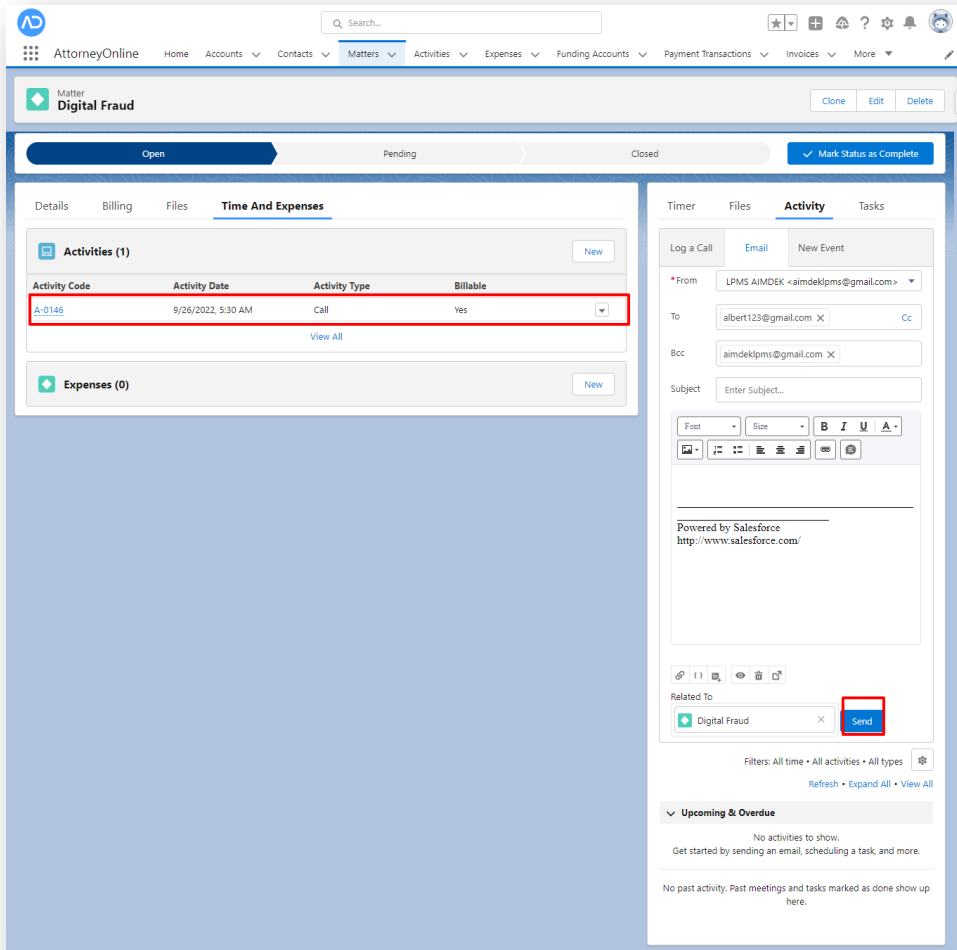
This Month

- Meeting** 8:00 PM | Yesterday
You had an event
- [No subject]** 7:17 PM | Yesterday
You sent an email to albert123@gmail.com

No more past activities to load.

Email:

In this section, the User can be able to send "Email" by entering "To", "Subject" and "Email body" parts. "Matter Name" will auto-populate from the list. Users can change it manually.



AttorneyOnline Home Accounts Contacts Matters Activities Expenses Funding Accounts Payment Transactions Invoices More

Matter Digital Fraud Clone Edit Delete

Open Pending Closed Mark Status as Complete

Details Billing Files **Time And Expenses**

Activities (1) New

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes

View All

Expenses (0) New

Timer Files **Activity** Tasks

Log a Call Email New Event

From LPMS AIMDEK <aimdek@aimdek.com>

To albert123@gmail.com X Cc

Bcc aimdek@aimdek.com X

Subject Enter Subject...

Font Size B I U A

Powered by Salesforce
http://www.salesforce.com/

Related To Digital Fraud X Send

Filters: All time • All activities • All types

Refresh Expand All View All

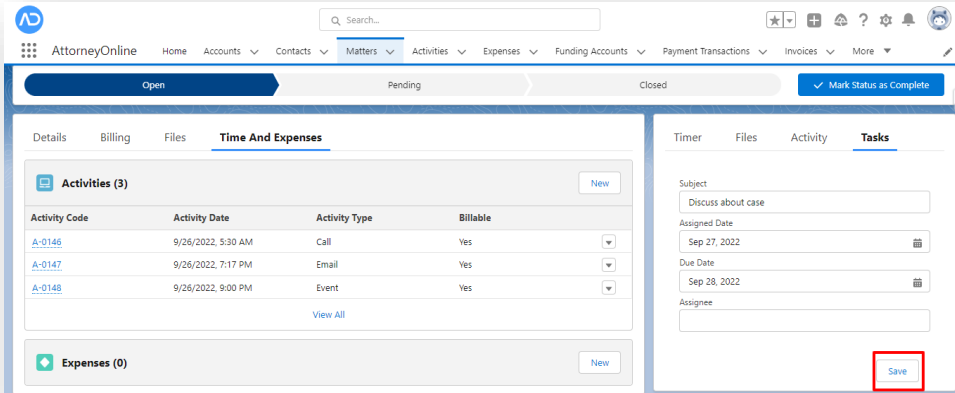
Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

New Task:

This section is used to create a “new task” without activity, where “Matter name” can be selected along with username. Also, it can state its current status.



AttorneyOnline

Search...

Home Accounts Contacts Matters Activities Expenses Funding Accounts Payment Transactions Invoices More

Open Pending Closed Mark Status as Complete

Details Billing Files **Time And Expenses**

Activities (3) New

Activity Code	Activity Date	Activity Type	Billable
A-0146	9/26/2022, 5:30 AM	Call	Yes
A-0147	9/26/2022, 7:17 PM	Email	Yes
A-0148	9/26/2022, 9:00 PM	Event	Yes

View All

Expenses (0) New

Timer Files Activity **Tasks**

Subject
Discuss about case

Assigned Date
Sep 27, 2022

Due Date
Sep 28, 2022

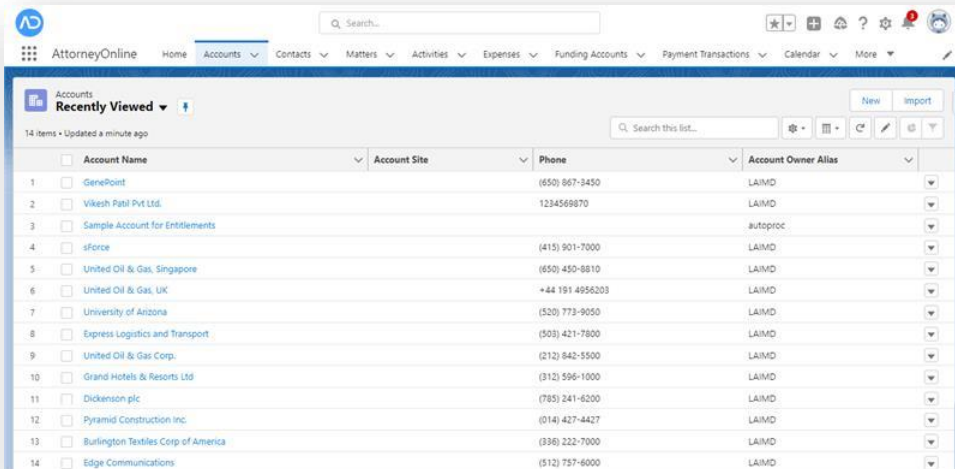
Assignee

Save

3.3 Accounts

This section is used to create accounts of different types. Accounts can be used to link customers. There is also option to “Edit”, “Delete” and “Change Owner”.

Listing shows Account name along with below details:



AttorneyOnline

Search...

Home Accounts Contacts Matters Activities Expenses Funding Accounts Payment Transactions Calendar More

Accounts Recently Viewed

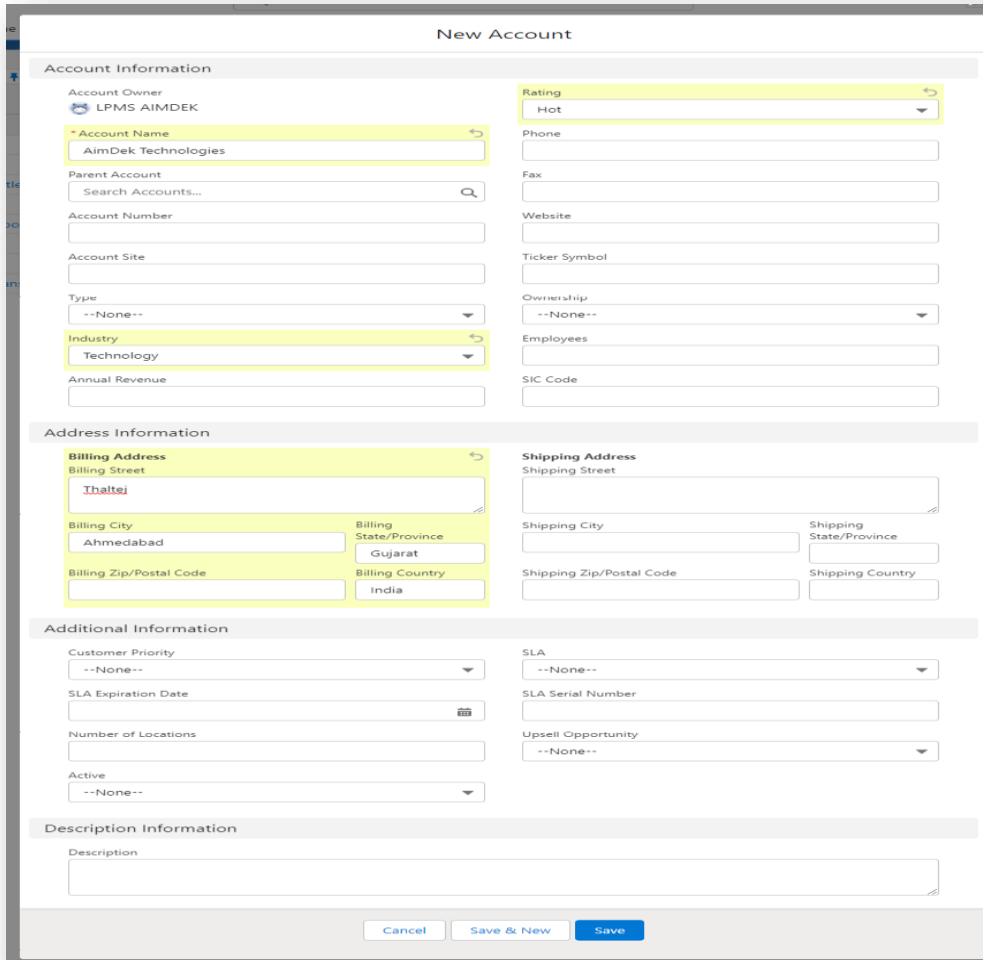
14 items • Updated a minute ago

Search this list...

New Import

	Account Name	Account Site	Phone	Account Owner Alias
1	GenePoint		(650) 867-3450	LAIMD
2	Vikesh Patel Pvt Ltd.		1234567890	LAIMD
3	Sample Account for Entitlements			autoproc
4	sforce		(415) 901-7000	LAIMD
5	United Oil & Gas, Singapore		(650) 450-8810	LAIMD
6	United Oil & Gas, UK		+44 191 4956203	LAIMD
7	University of Arizona		(520) 773-9050	LAIMD
8	Express Logistics and Transport		(503) 421-7800	LAIMD
9	United Oil & Gas Corp.		(212) 842-5500	LAIMD
10	Grand Hotels & Resorts Ltd		(312) 596-1000	LAIMD
11	Dickenson plc		(785) 241-6200	LAIMD
12	Pyramid Construction Inc.		(014) 427-4427	LAIMD
13	Burlington Textiles Corp of America		(336) 222-7000	LAIMD
14	Edge Communications		(512) 757-6000	LAIMD

To create a new account, users have to fill below details:



New Account

Account Information

Account Owner
LPMS AIMDEK

Account Name
AIMDek Technologies

Parent Account
Search Accounts...

Account Number

Account Site

Type
--None--

Industry
Technology

Annual Revenue

Rating
Hot

Phone

Fax

Website

Ticker Symbol

Ownership
--None--

Employees

SIC Code

Address Information

Billing Address

Billing Street
Thaltej

Billing City
Ahmedabad

Billing State/Province
Gujarat

Billing Zip/Postal Code

Billing Country
India

Shipping Address

Shipping Street

Shipping City

Shipping State/Province

Shipping Zip/Postal Code

Shipping Country

Additional Information

Customer Priority
--None--

SLA
--None--

SLA Expiration Date

Number of Locations

Active
--None--

SLA Serial Number

Upsell Opportunity
--None--

Description Information

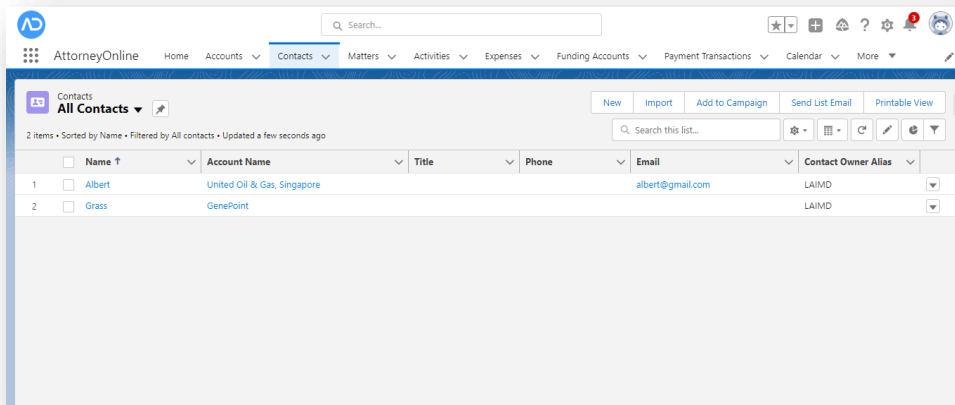
Description

Cancel Save & New Save

While creating an account, the user can define account type, rating, parent account, industry, and ownership.

3.4 Contacts

There is a default option for contacts to add, edit and get the list of already created contacts.



To create new contact, there is an option at top of the window, click on “New” button and it will open new window as below

New Contact

Contact Information

Contact Owner
 LPMS AIMDEK

*** Name**

Salutation
Mr. ▼

First Name
Alber

* Last Name
Grass

Account Name ✕

 GenePoint

Title

Department

Birthdate
 

Reports To
 Search Contacts... 🔍

Lead Source
--None-- ▼

Phone

Home Phone

Mobile

Other Phone

Fax

Email

Assistant

Asst. Phone

Address Information

Mailing Address

Mailing Street

Mailing City
Toronto

Mailing State/Province

Mailing Zip/Postal Code

Mailing Country
Toronto

Other Address

Other Street

Other City

Other State/Province

Other Zip/Postal Code

Other Country

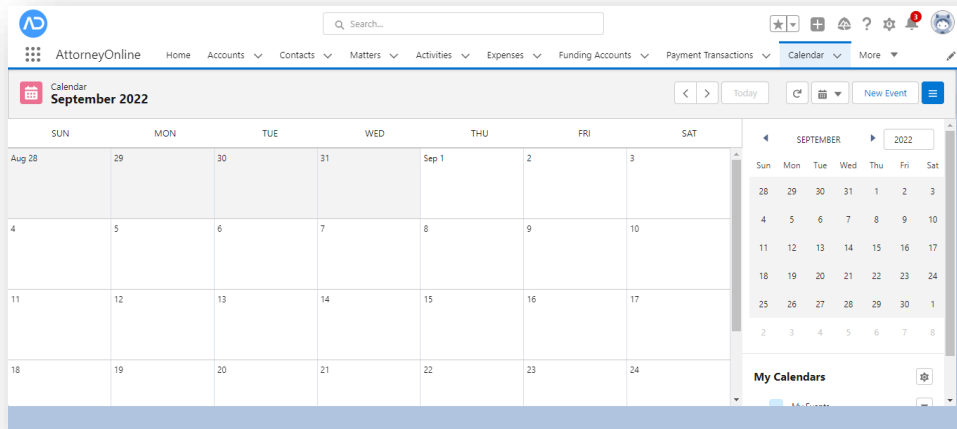
Description Information

Description

Cancel
Save & New
Save

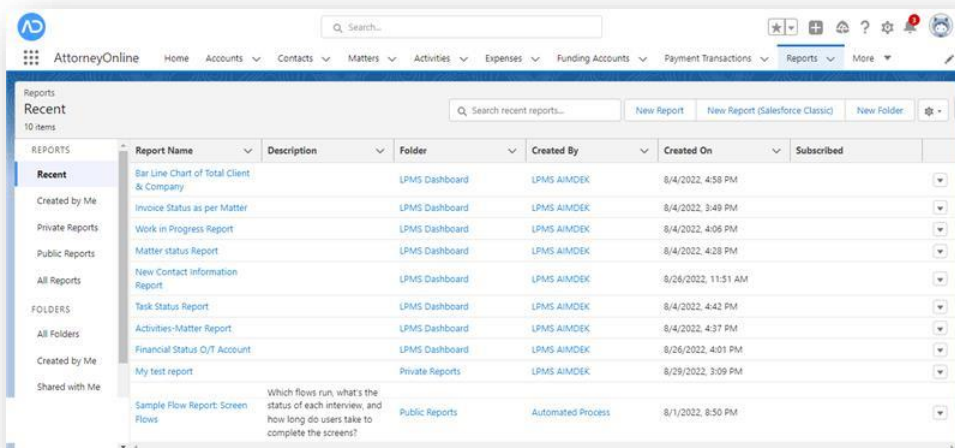
3.5 Calendar

The calendar is unique and an important feature in the whole system. As it gives facility to see logged in user's recent events, upcoming events and their team's recent and upcoming events. Users can see events in decent calendar view as below:



3.6 Reports

One of the essential parts of the system is very useful and gives an overview of each piece of data.



The Report section is divided into several different sub-parts like “Recent”, “Created by Me”, “Private Reports”, “Public Reports” and “All Reports”

There is also the facility to manage favorites and folders for specific reports. Users can create “New Report” as per custom requirements, and “New report (Salesforce Classic)” as from the salesforce default menu.

4. Glossary

Term	Description
Unbilled Amount	The amount of the matter that has NOT been attached or billed to an invoice.

Responsible Attorney	The username is set as the Responsible Attorney for the selected matter.
Unpaid Amount	The amount of the matter that has been attached/billed to an invoice has not been paid yet.
Draft	The invoice is still being prepared.
Submit for Approval	If the user preparing the invoice does not have approval rights, s/he needs to submit the invoice for approval by clicking on the "Mark Next Stage as Complete" button.
Approved	The user with approval rights will approve the invoice by clicking on the Mark Next Stage as Complete button. The button for "Email Invoice PDF" shall be activated.
Sent	Upon clicking "Email Invoice PDF", the invoice is sent to the "Contact" email and the stage changes to be "Sent".
Partially Paid	This stage is auto selected if a partial payment is made for the invoice.
Overdue	This stage is auto selected if the Due Date has passed, and FULL payment has not been made for the invoice.
Paid	This stage is auto-selected once the invoice is fully paid.
Trust Account	Trust accounts are bank accounts set up specifically to hold client retainers. Trust accounts are held in the law firm's name, but the money in them belongs to the client.
Operating Account	An operating account is an account from which the firm can make payment of its expenses: ○ Salaries and Payroll

	○ Utilities ○ Rent It's also the account into which firm profits are deposited.
Statute of Limitations	The time limit for filing charges against the defendant.
Practice Area	The area of law in which an attorney primarily focuses throughout their career.
Matter	This is the issue on which the case can be filed.
Originating Attorney	The lawyer is responsible for bringing business to the firm.
Responsible Attorney	The lawyer to whom primary responsibility is assigned for the matter.
Hourly Rate	When the lawyer charges the client for each hour.
Contingency	This is based on a percentage of the amount awarded in the case. If you lose the case the lawyer does not get a fee but pays some of the expenses.
Flat fee	When a lawyer charges specific or total fees, mostly in simple cases like "creating a will" etc.



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