AIMDek Technologies

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

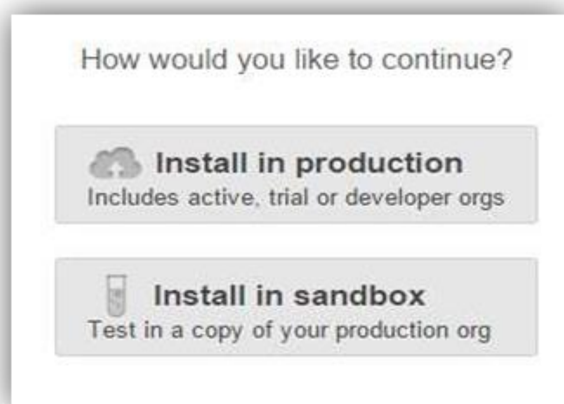
2. Search for AttorneyOnline

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.

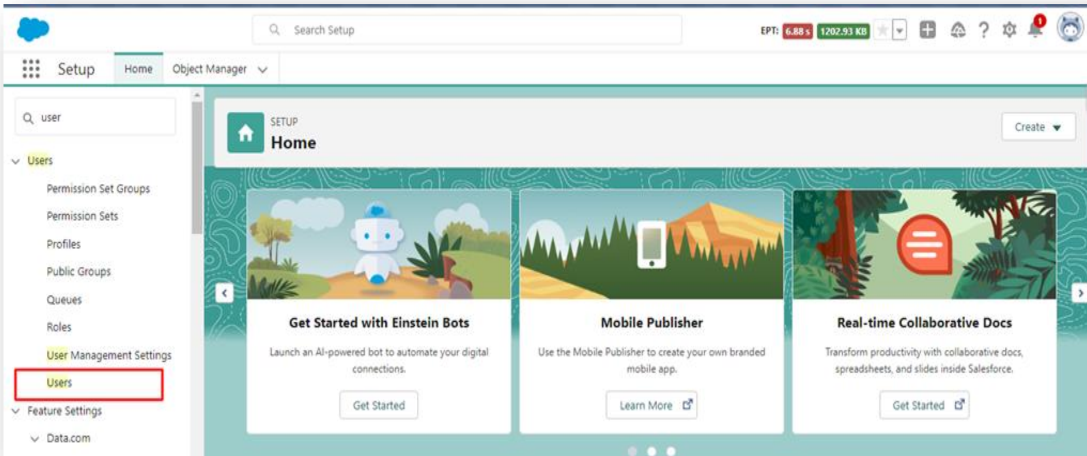
2.2 Prerequisites

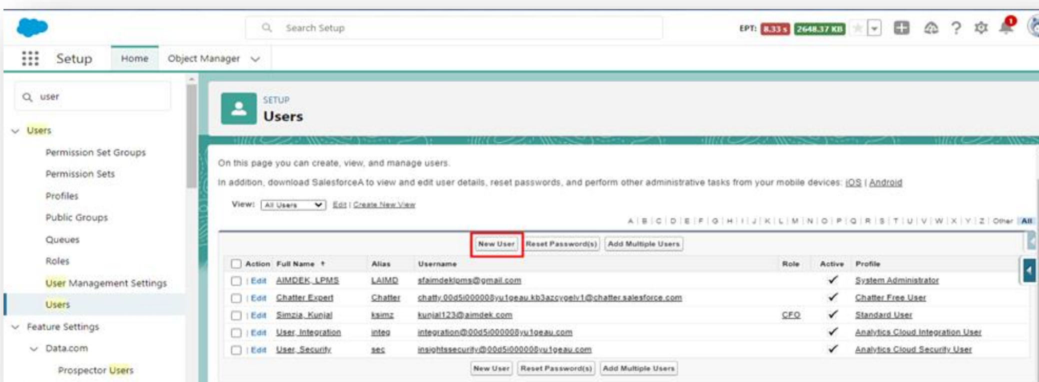
Before using the application, there are some pre-requisites to be followed, there is a need for a user-account. There are two types of main users as below:

- Admin User (System Administrator)
- Standard User

2.2.1 Create User

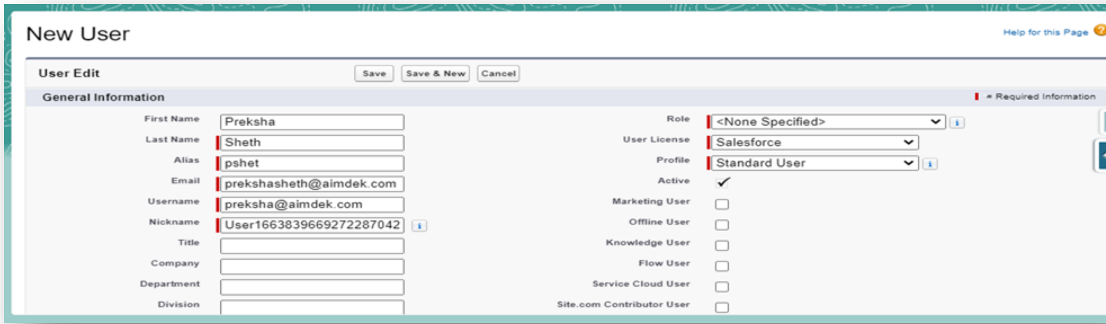
- Go to setup
- Write users in quick find box





- Click on the new user button

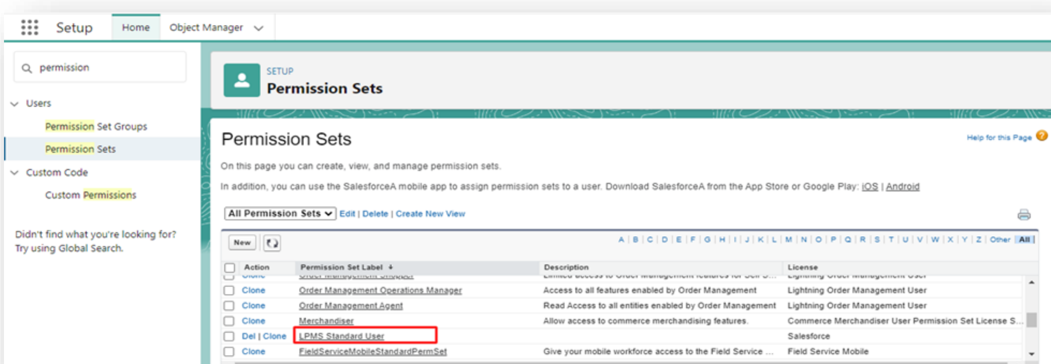
- While adding all the information, specify “Salesforce” in the “User License” field and select “Standard User” in the “Profile” dropdown selection.



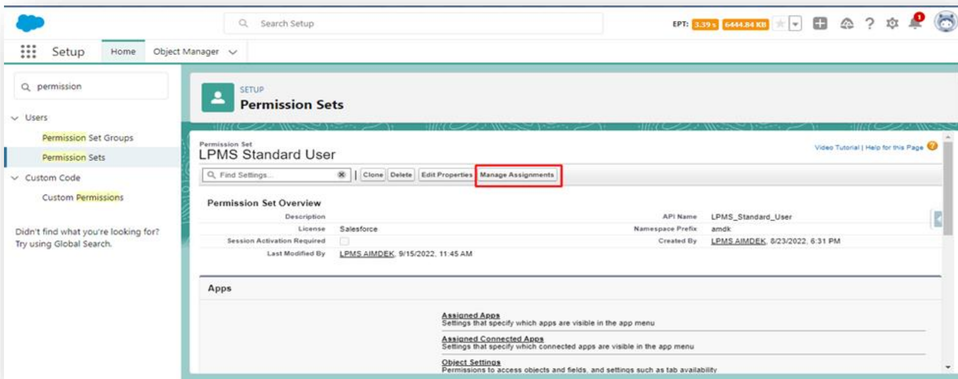
2.2.2 Assign permission set to standard user:

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

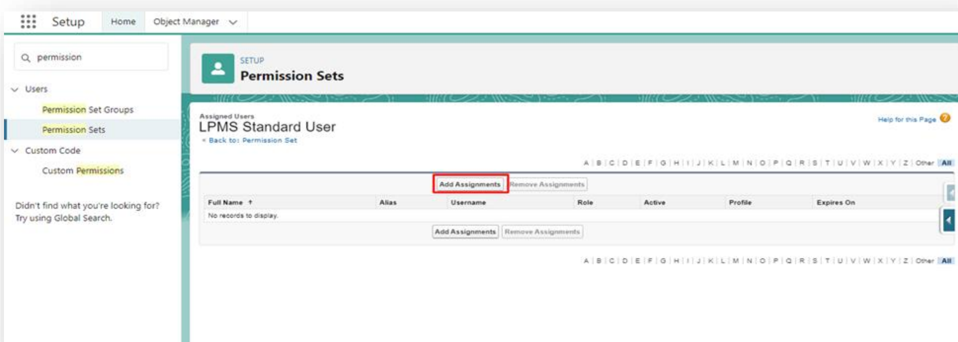
- Search 'permission set' in quick find in setup
- Select AttorneyOnline Standard User'



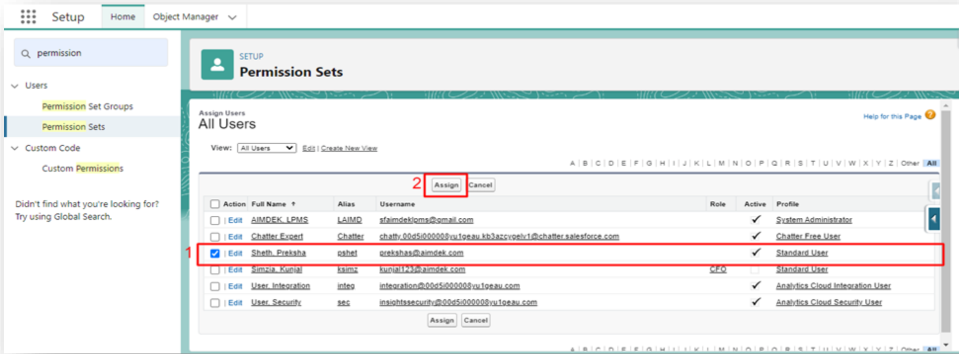
- Select 'Manage Assignment'



- Select 'Add Assignment'



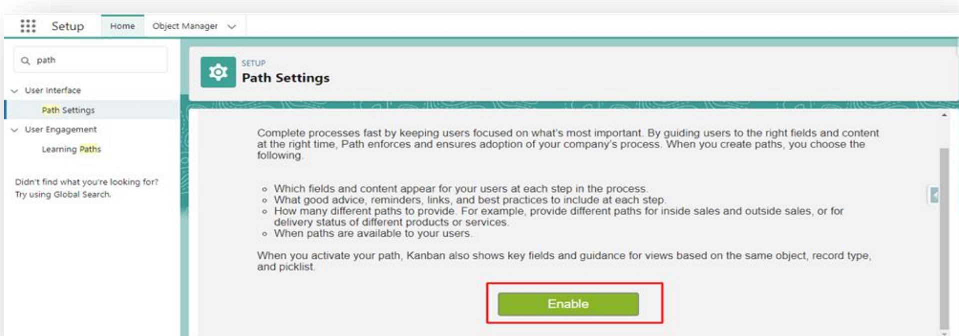
- Select the standard user you want to Assign and save.



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

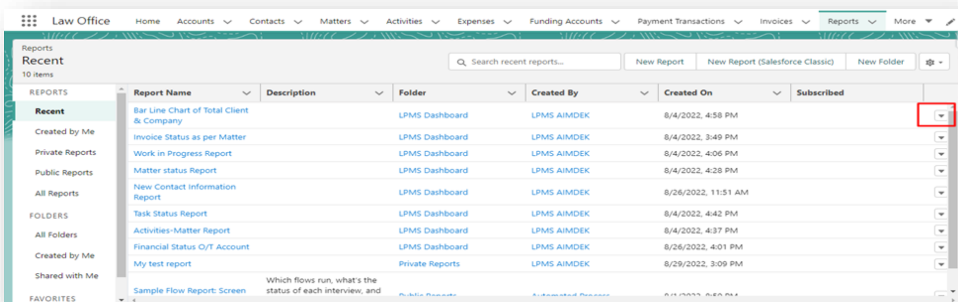
Next step in the process is to “Enable Path”, follow below procedure to do this action:

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

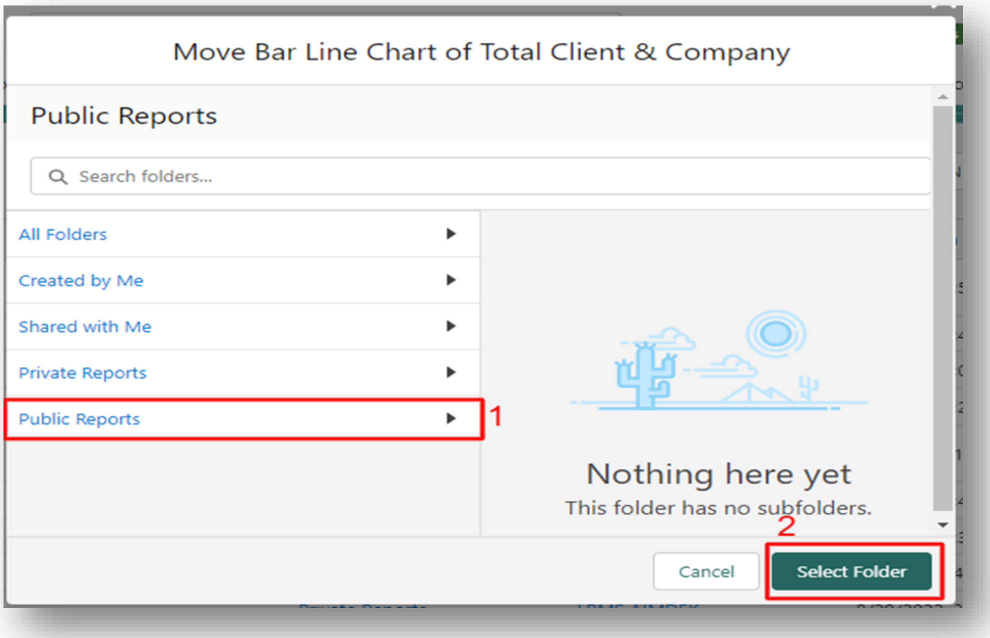


For the Reports section, there is only an “Administrator” who has the right to give permissions to a standard user. By default, only Admin users have the right to view the reports.

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

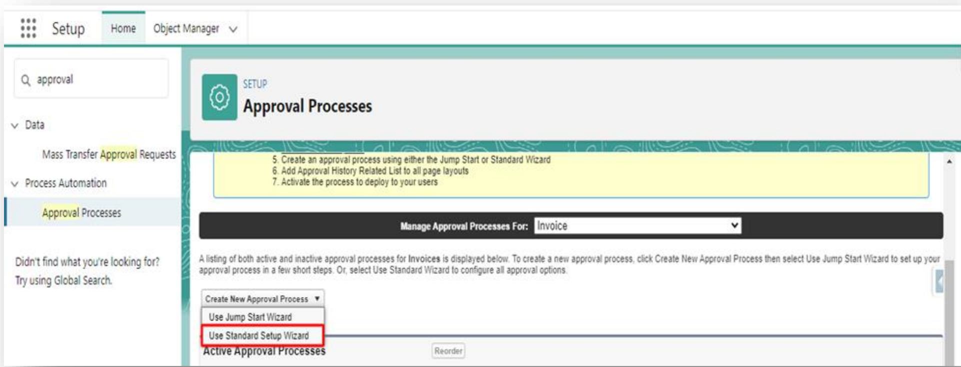


2.2.3 Approval Process:

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



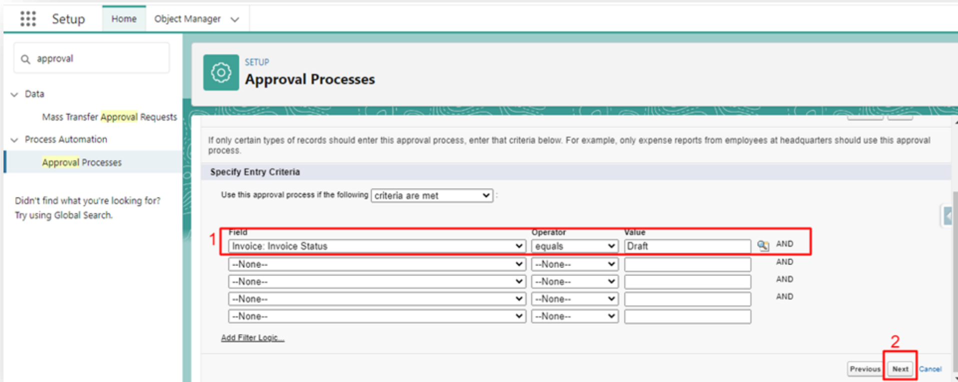
- Enter Process name and description and press “Next” button.

- **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

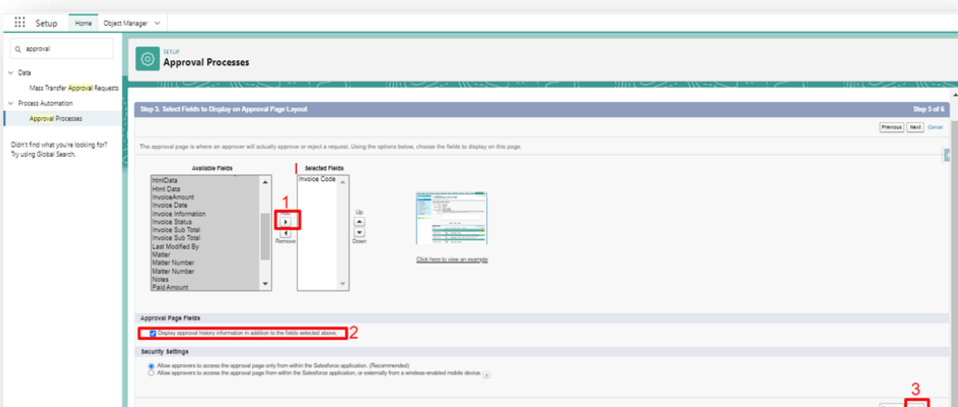
Then Press “Next”.



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”.



- **Step 6:**

  Here select Initial Submitters as below:

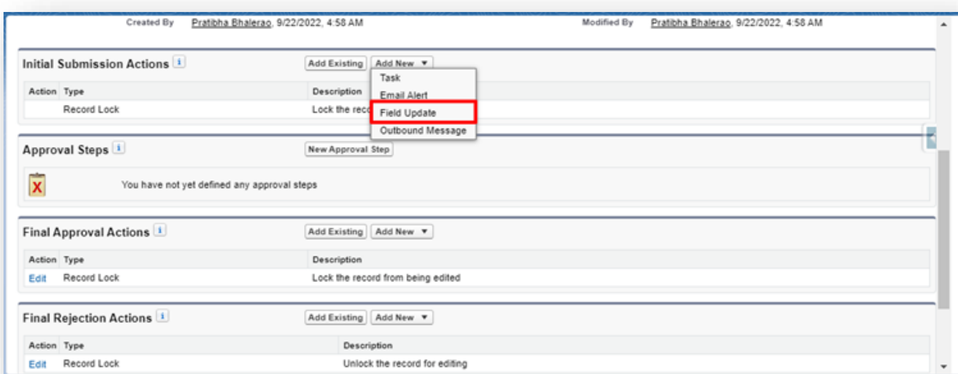
  Submitter Type Search: Owner Then go to “Submission Settings” and

  Select -> Allow submitters to recall approval requests. And click “Save”.

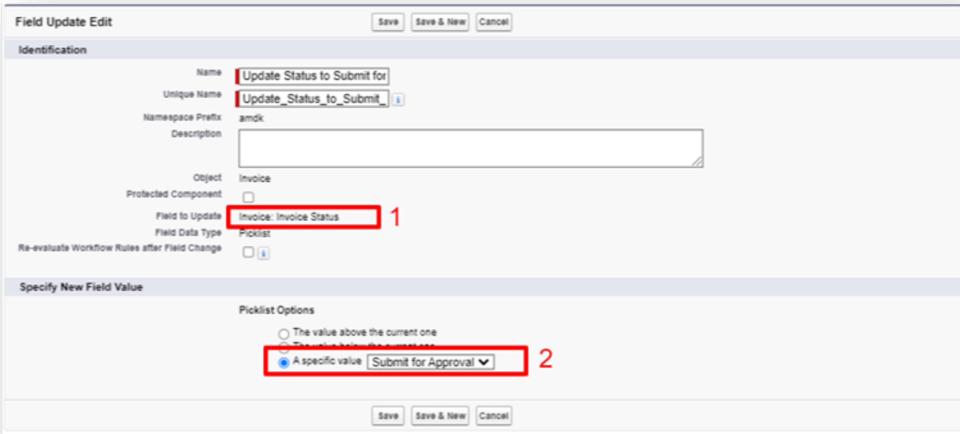
- **Step 7:**

  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



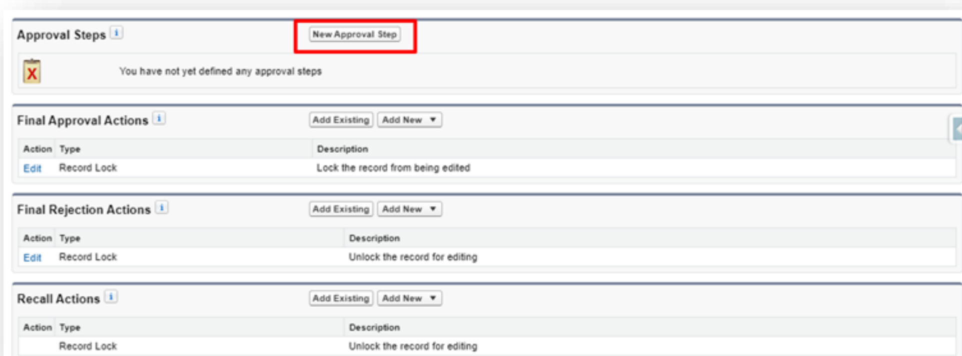
  - Field to Update -> Invoice Status
  - Specify New Field Value
  - Select ->A specific value -> Submit for Approval



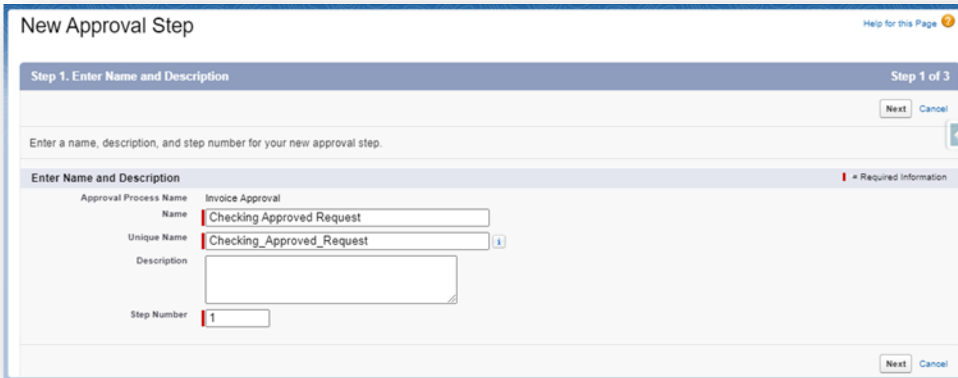
And then click on “Save”.

- **Step 8:**

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



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

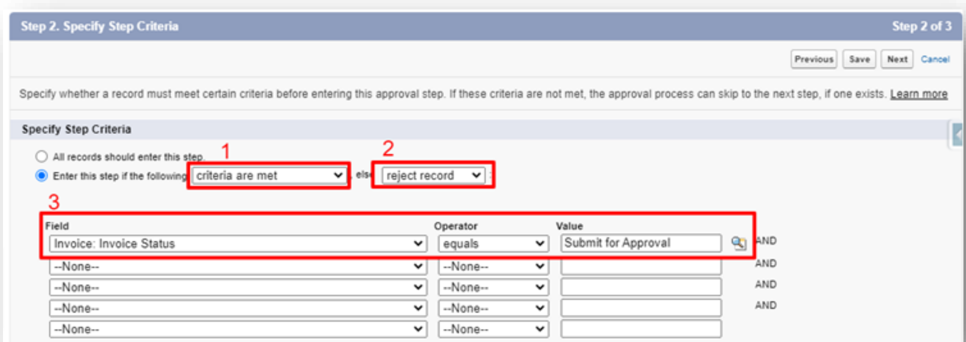


Enter this step if the following -> criteria are met, else ->reject record:

Field -> Invoice: Invoice Status

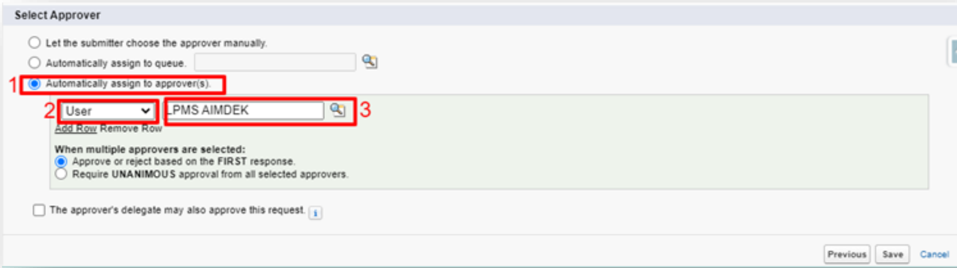
Operator -> equals

Value -> Submit for Approval



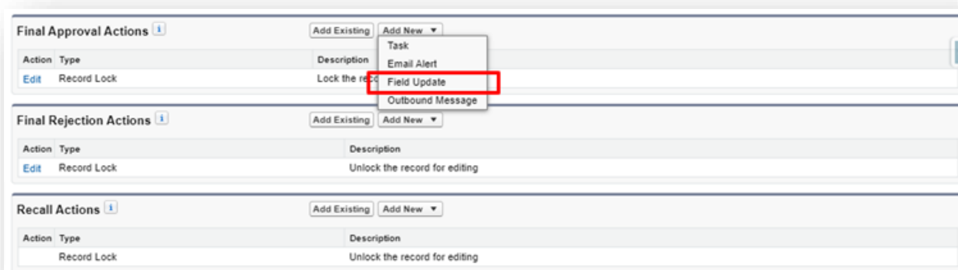
And then press “Next”.

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



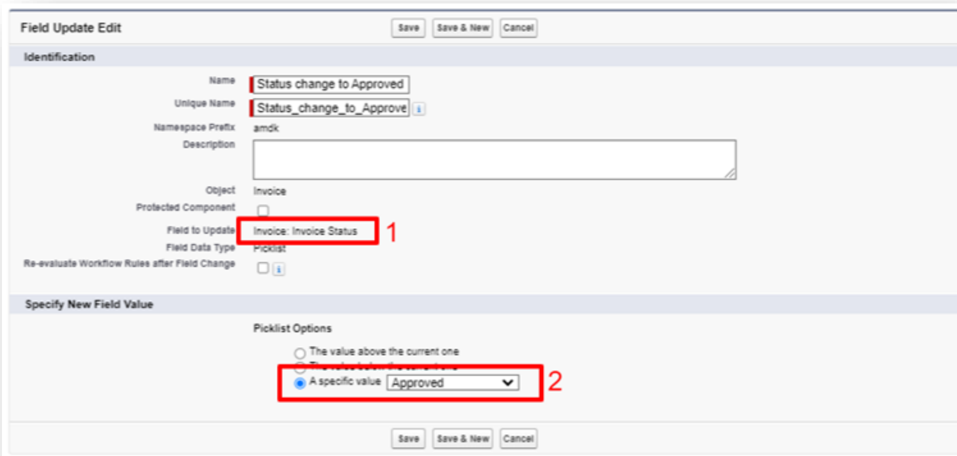
- **Step 9:**

  This step is used for "Final Approval actions"



Follow the actions below in sequence to complete this step:

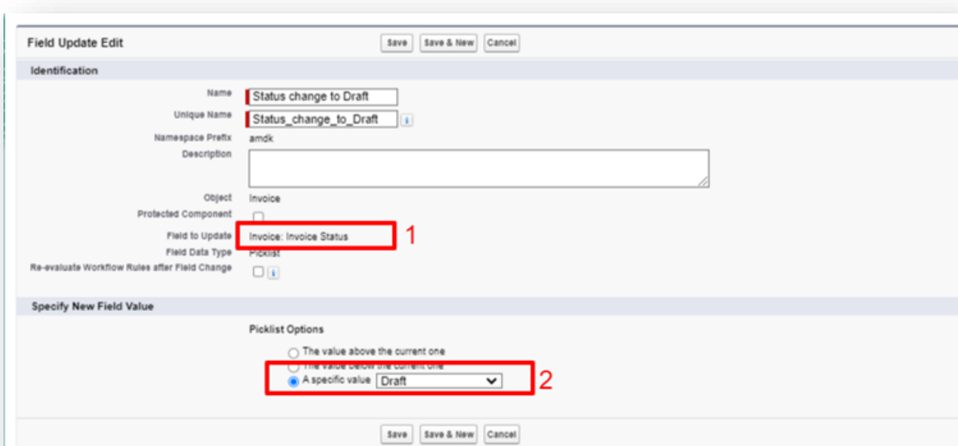
  - Add New -> Field Update ->
  - Name -> Changing Status to Approved
  - Field to Update -> Invoice Status
  - Specify New Field Value
  - Select ->A specific value -> Approved



- **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

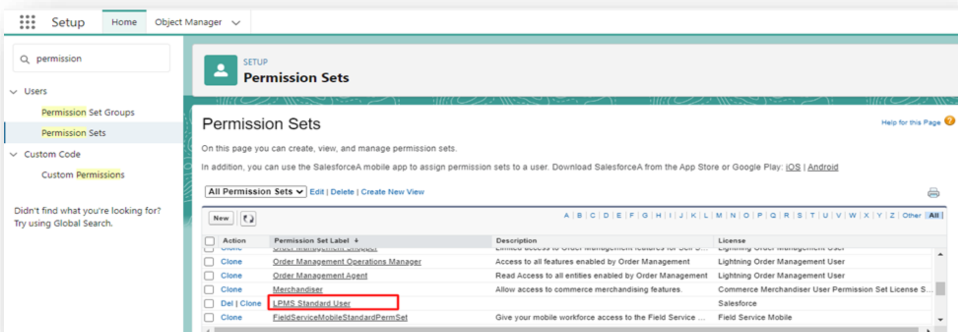


Now click on “Save” and then click on “Activate Process”.

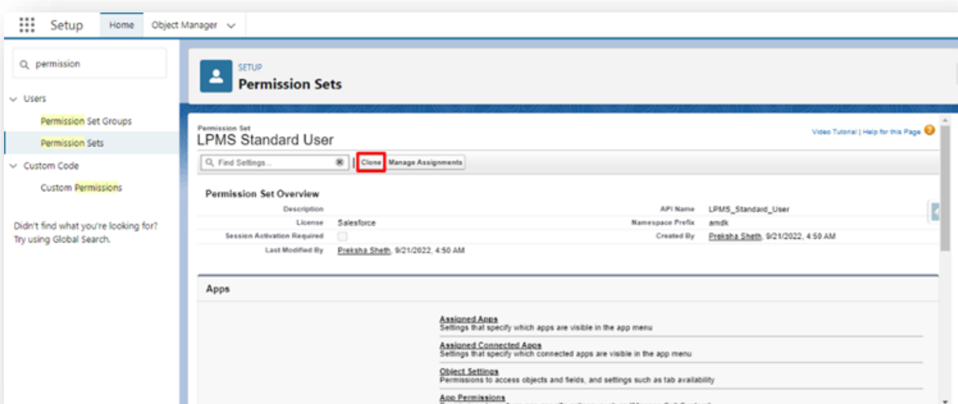
2.2.3 Files Tab Flows Permission

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

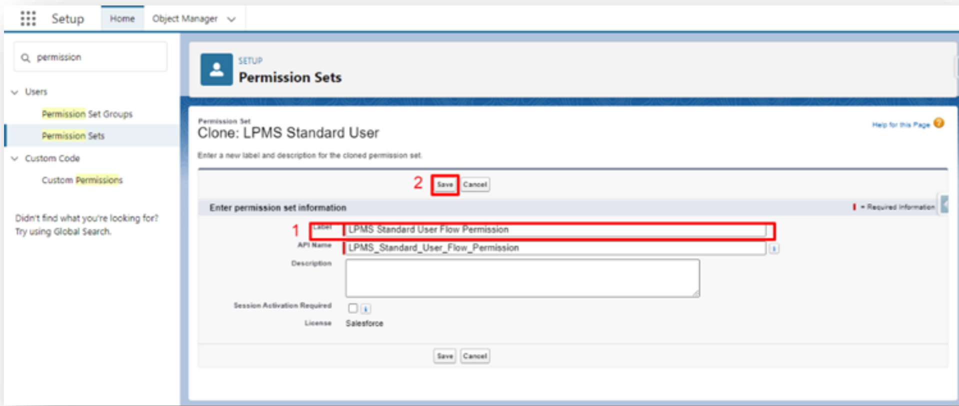
- Search 'permission set' in quick find in setup
- Select AttorneyOnline Standard User'



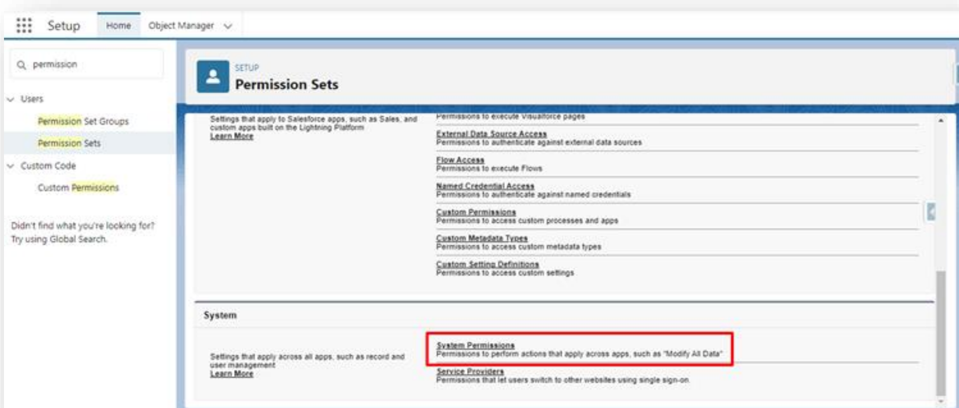
Then click on “Clone” button.



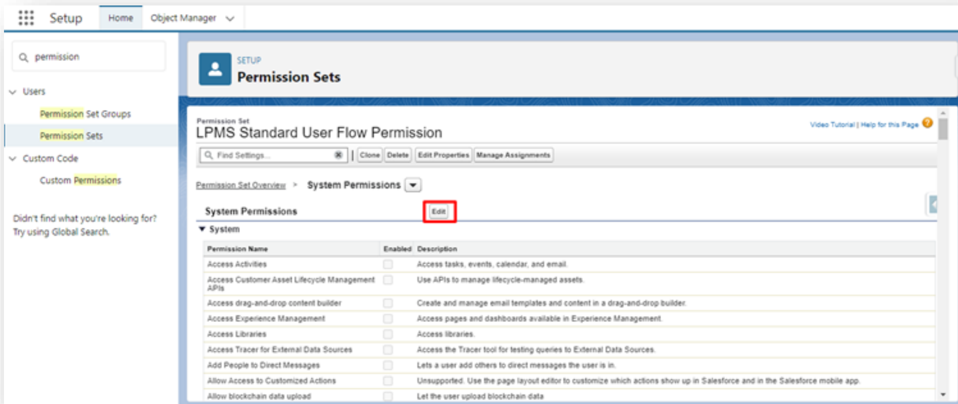
Then give valid name and “Save”.



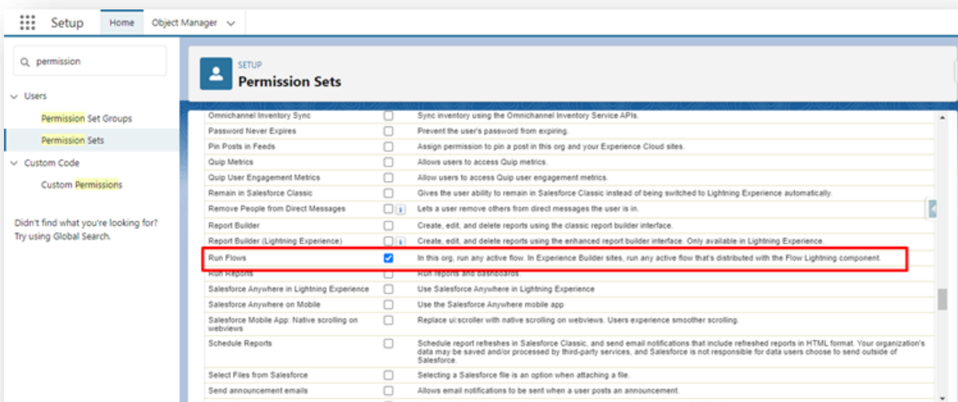
Then open the cloned permission set and go to system permission.



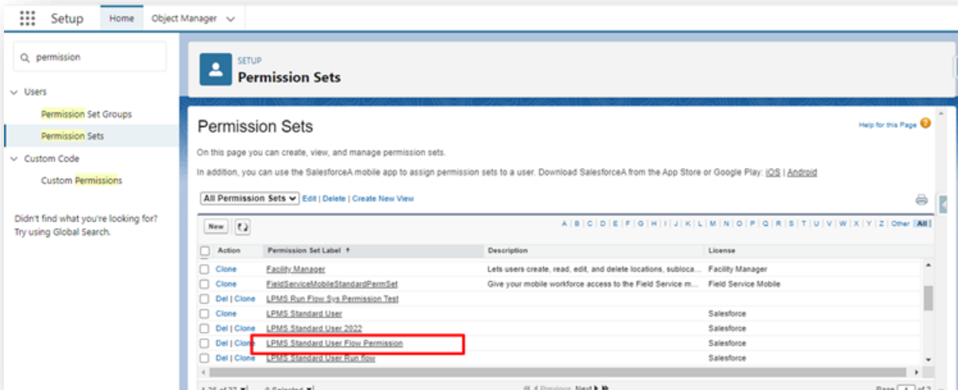
Click on the Edit button and the next screen will be displayed below:



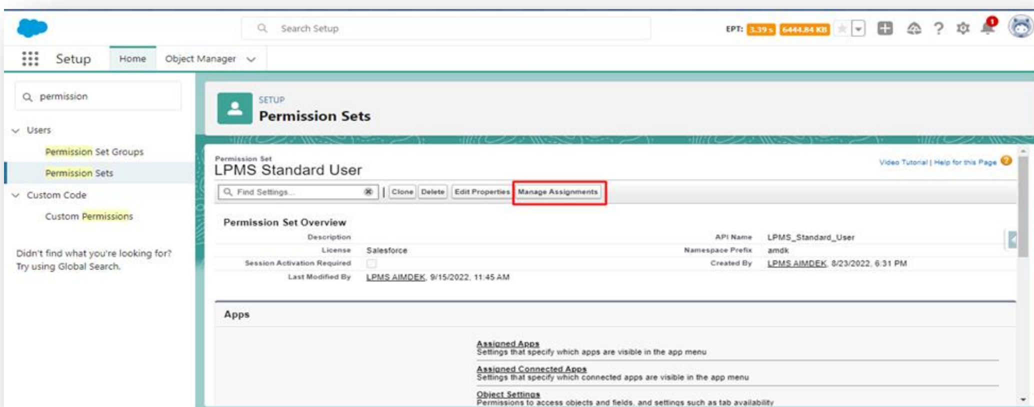
Then tick the ‘Run Flow’ checkbox in the list and save it.



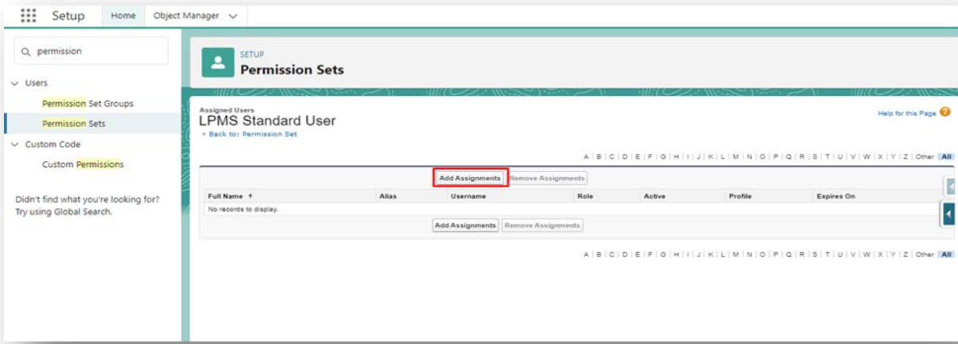
Then select Cloned Permission set



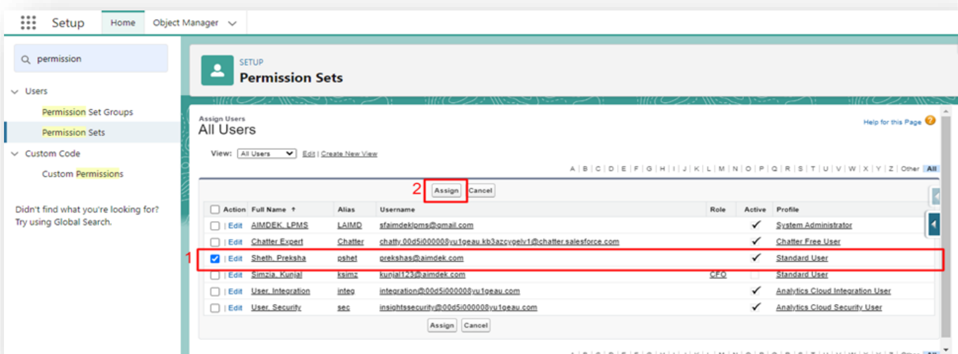
Select 'Manage Assignment'



Select 'Add Assignment'



Select the standard user you want to Assign and save.

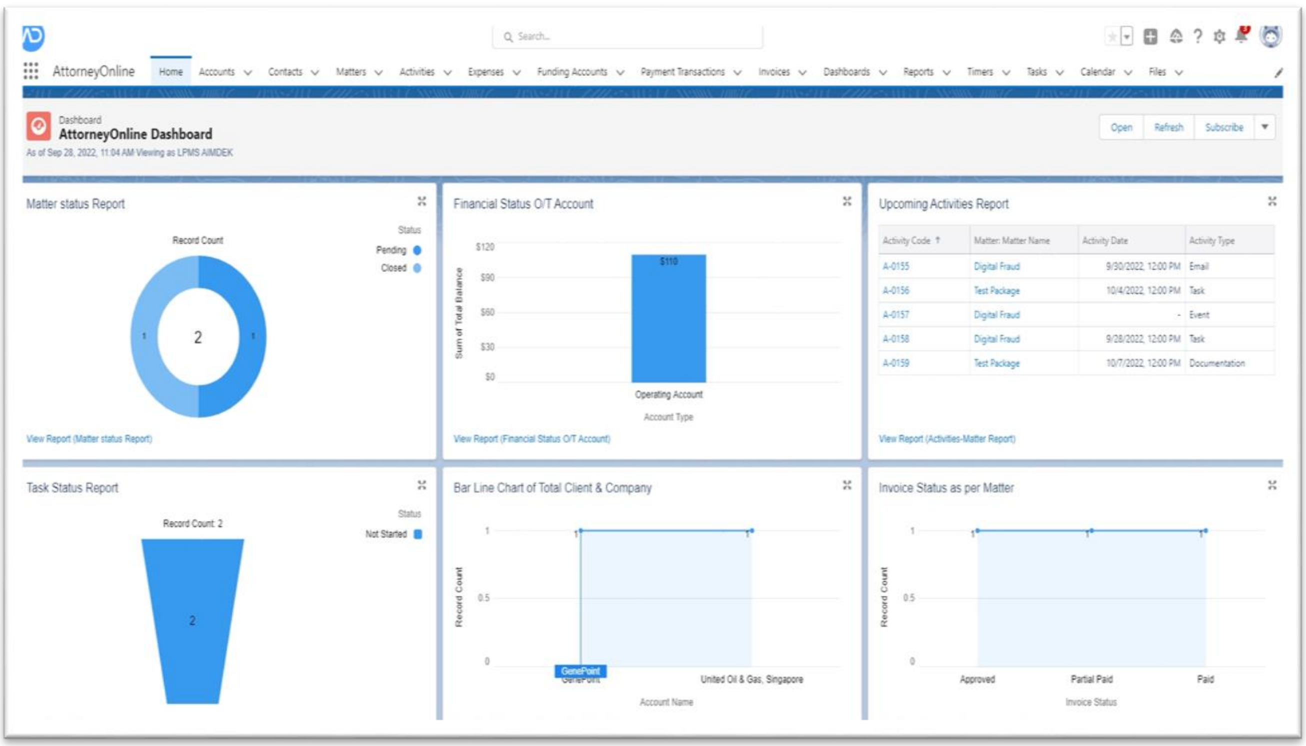


Only System Administrator can assign the permission set to the user.

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



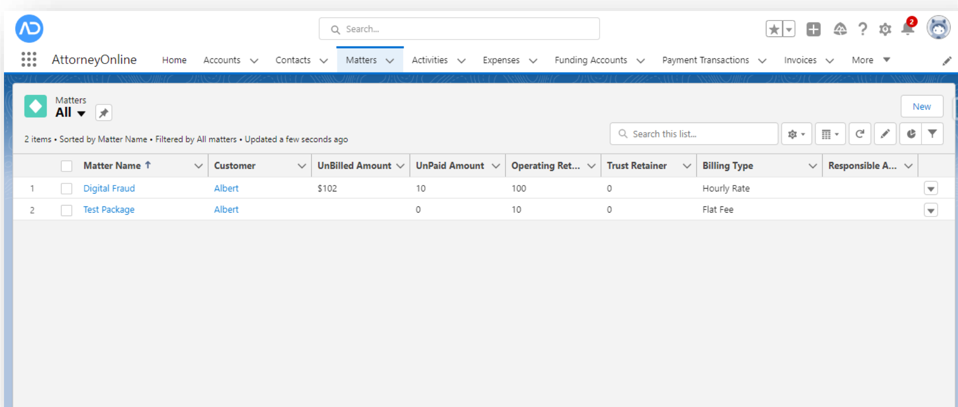
This dashboard includes several essential pieces of information for the entire system. This shows the following sections on this tab filtered for the user that is logged in

- *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".

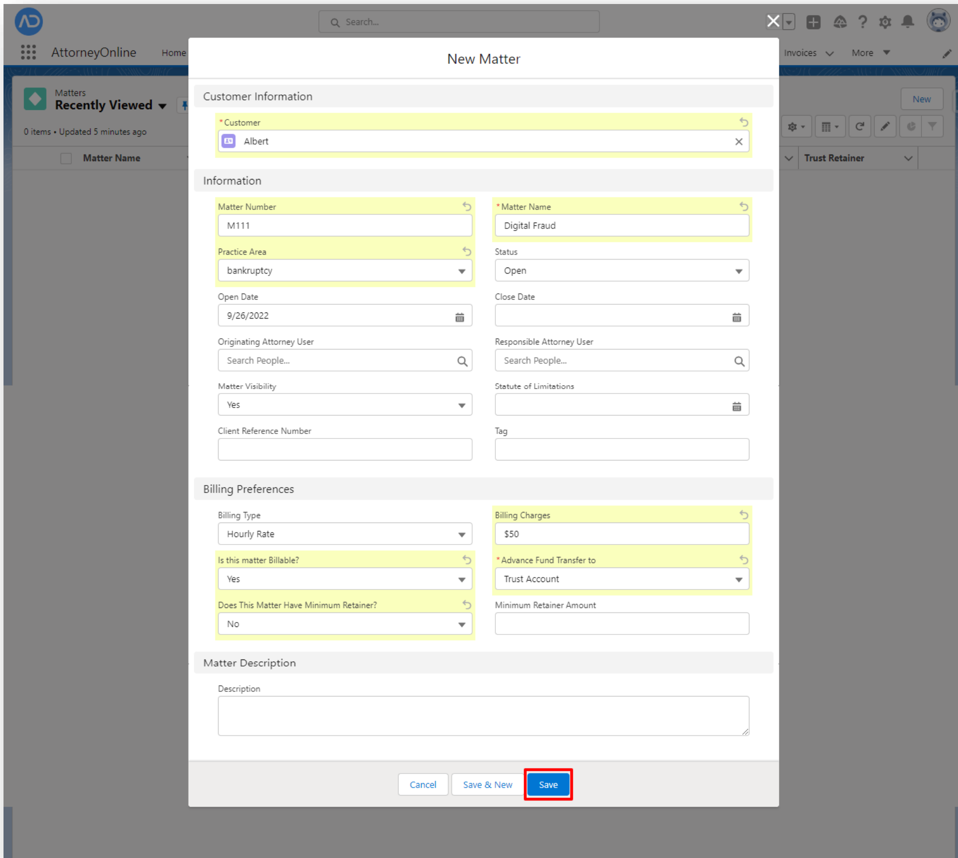
3.2 Matters

3.2.1 Matters Listing Page



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



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”.

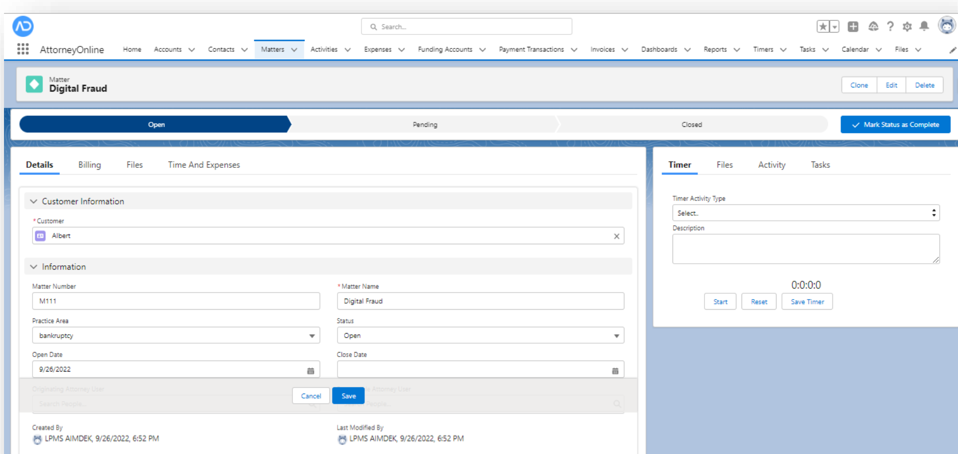
There are three different fee types below which are mostly used in creating matter and invoices:

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



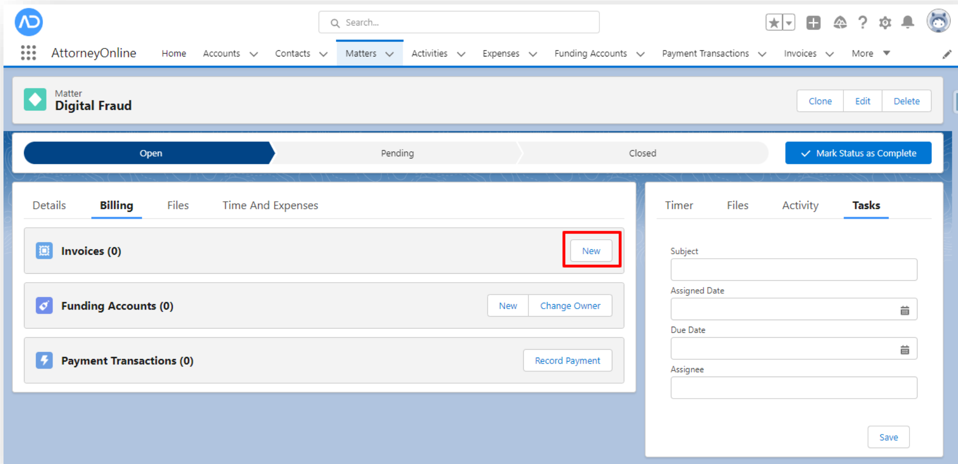
Upon clicking on a particular matter from the listing page, this page will be displayed along with all the detailed information about the selected matter. The Details tab consists of some more sub-sections as below:

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

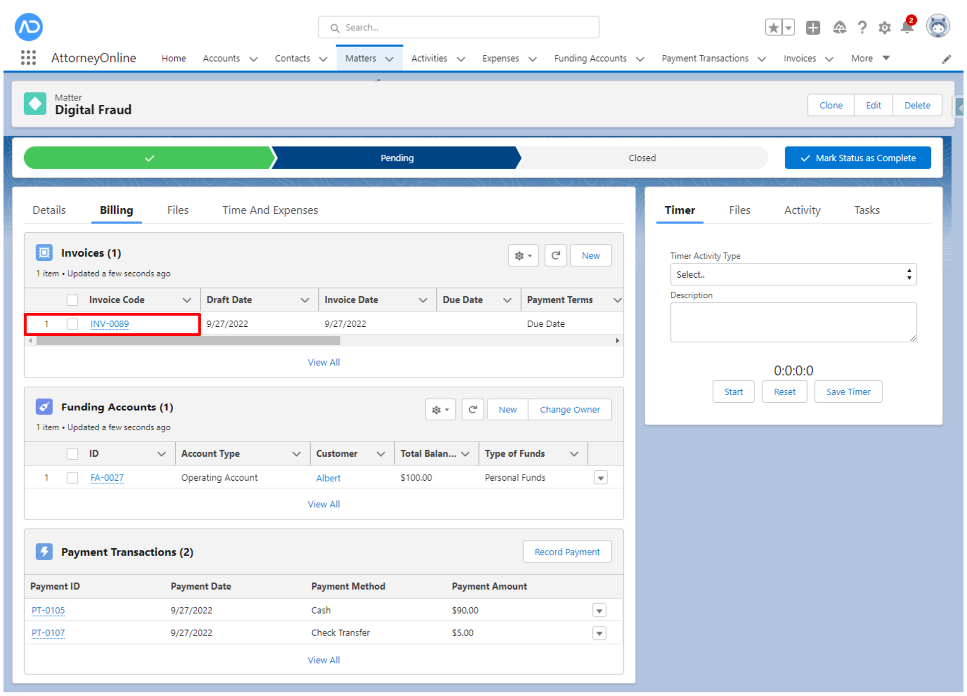
- Details

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.

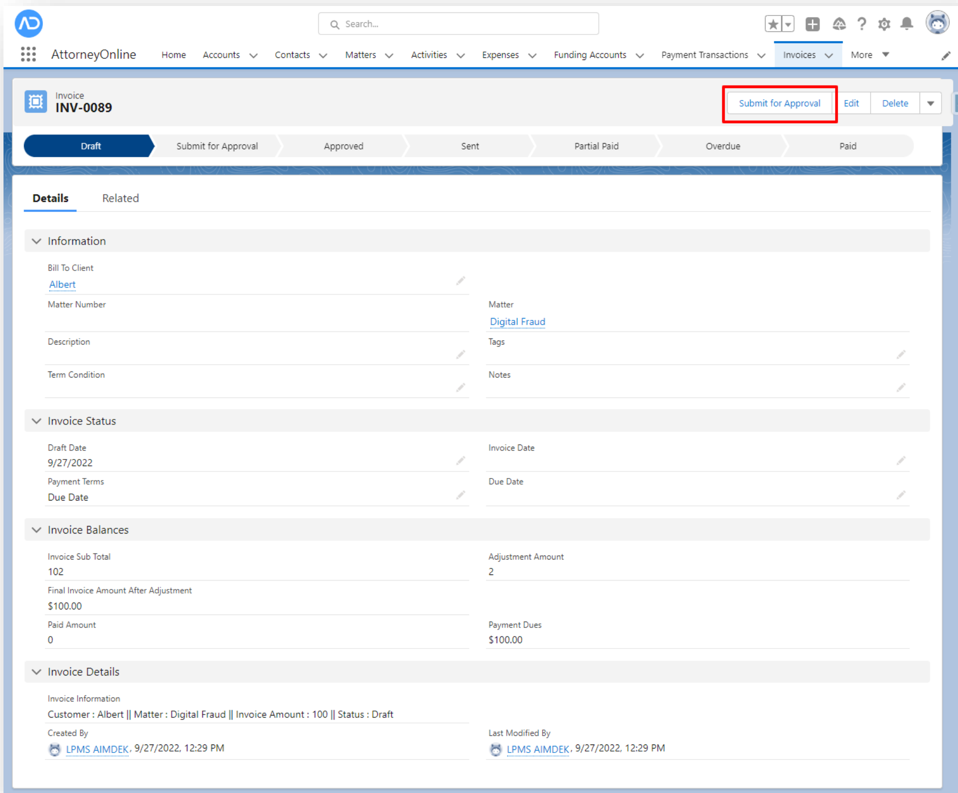
- Billing



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.

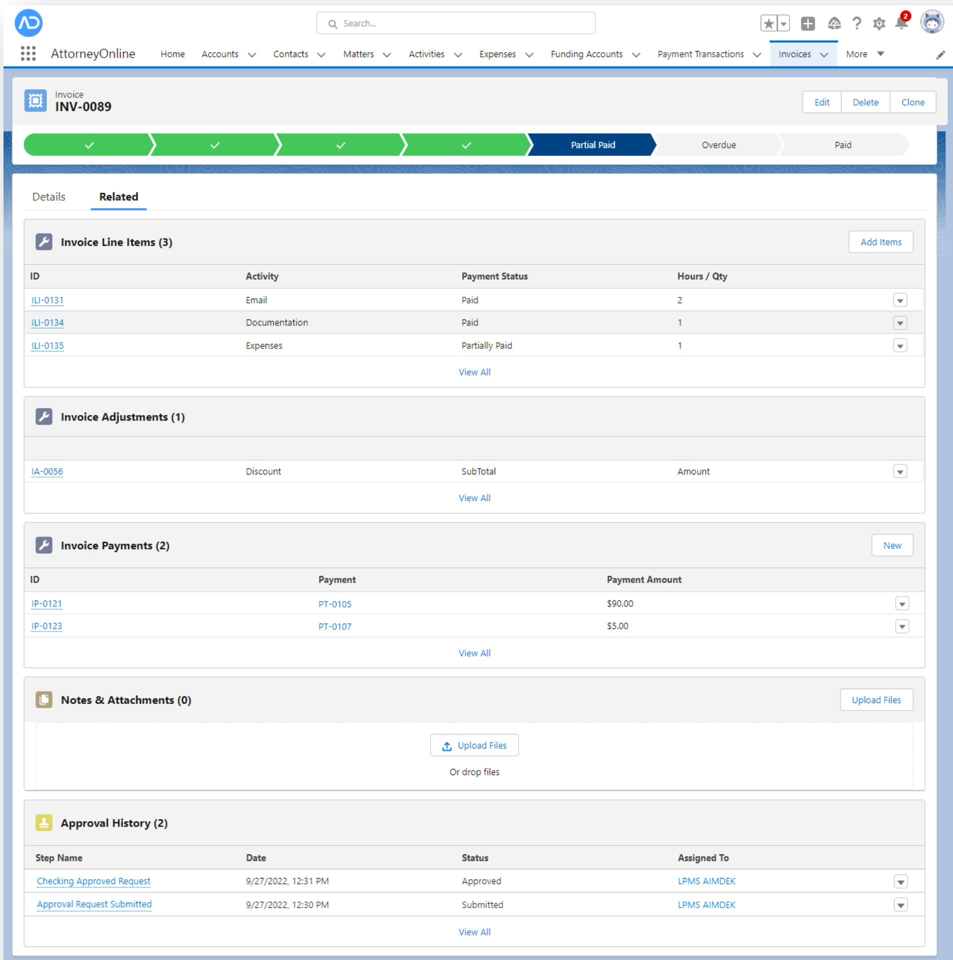


Once the User clicks on any of the invoices, it will open a detailed view of the invoice as shown below:



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

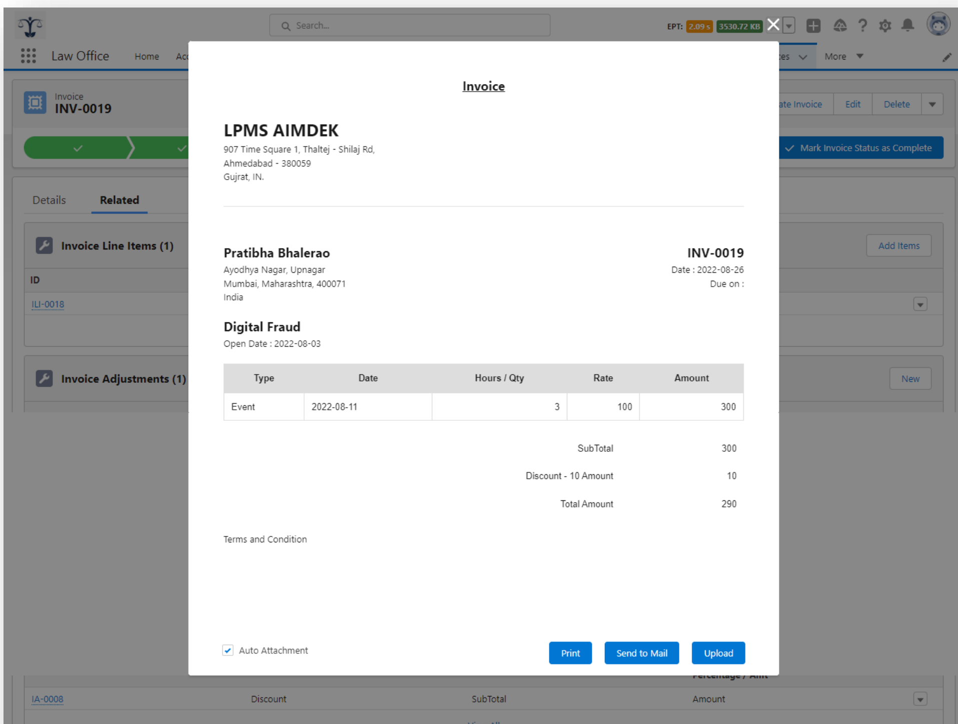
There is another section called “Related”, There are options at the top right side like “Edit", "Delete” and “Clone”. which shows below details for the invoice:



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 ice 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”.

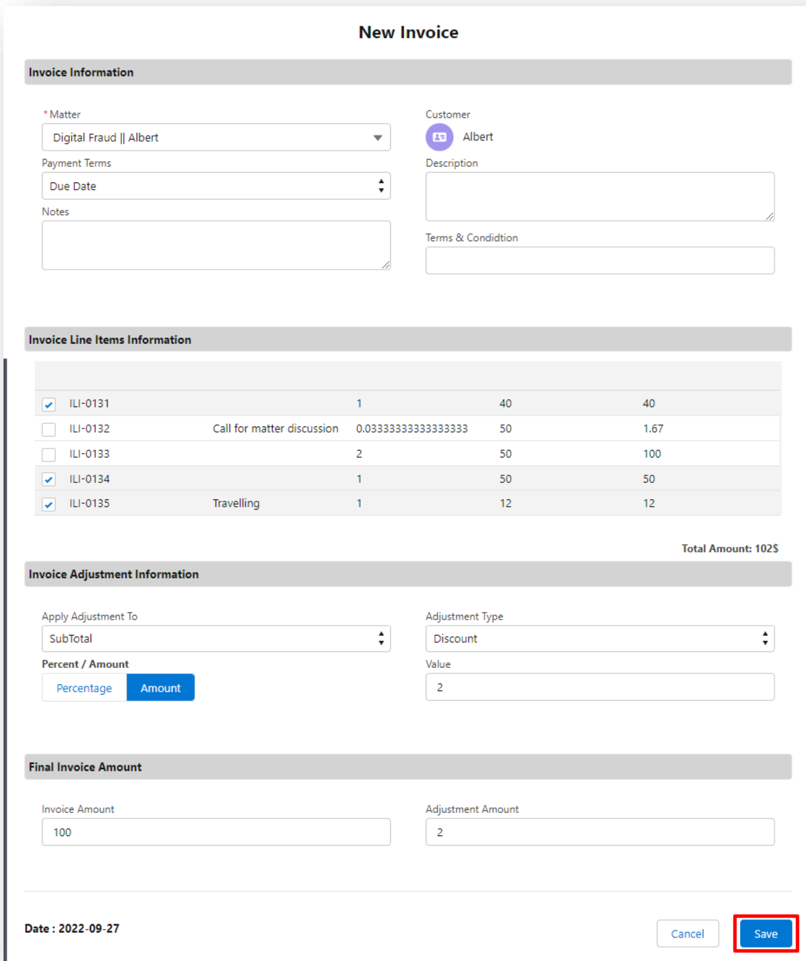


○ Invoice

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:



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

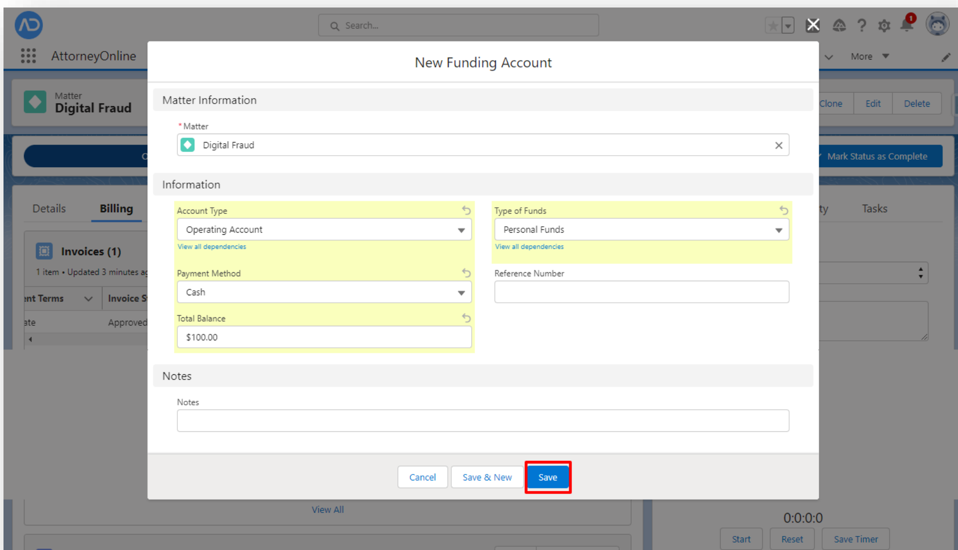
There is option to select different payment terms like “Due date”, “Due on receipt”, “Net 15 days”, “Net 30 days” and “Net 60 days”.

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:



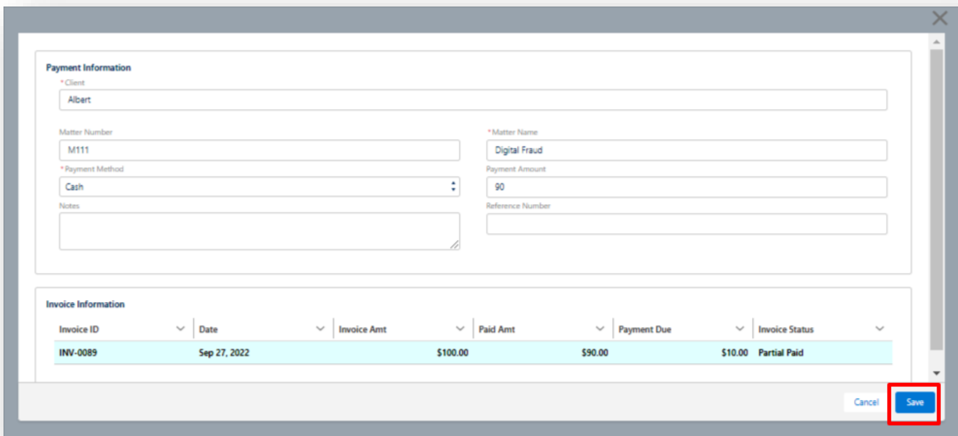
Here users can see a list of contacts for whom they want to create a funding account.

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:



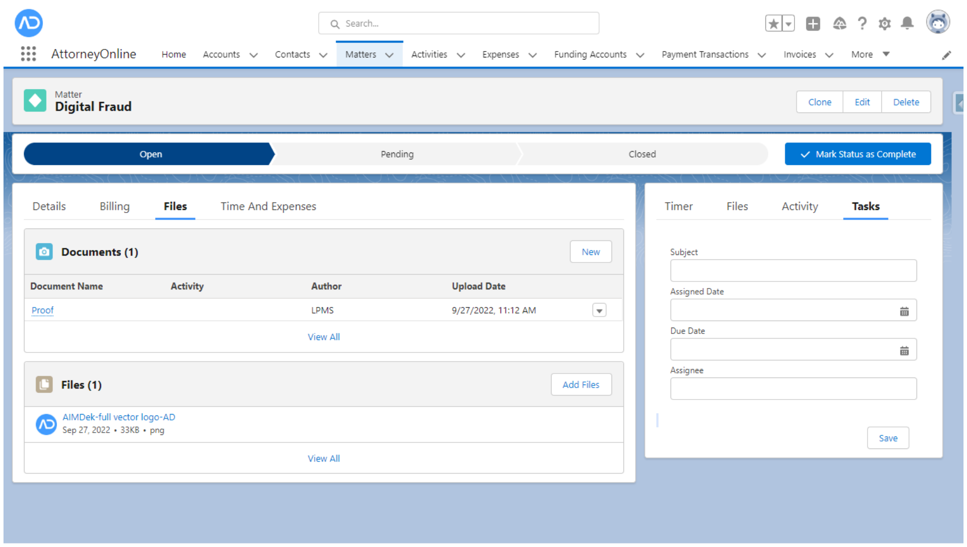
This section is used to record payment transactions made by customers. Here User can select "payment method" from the given payment options. There is a facility to enter notes and reference numbers for the payment transaction.

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

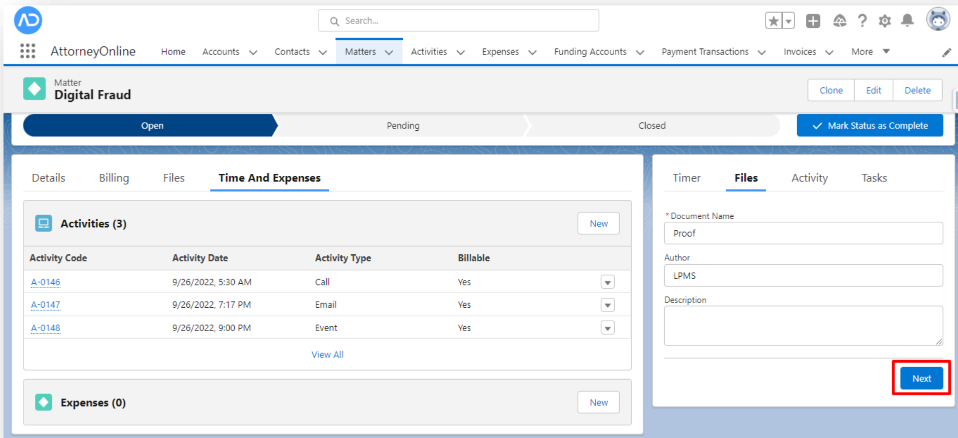
It shows the invoice amount, the total amount paid, the total amount due, and the invoice status. Whatever amount is entered into the "payment amount" box is adjusted against the "total amount due" and it shows the updated amount on the go.

- ## Documents and Files

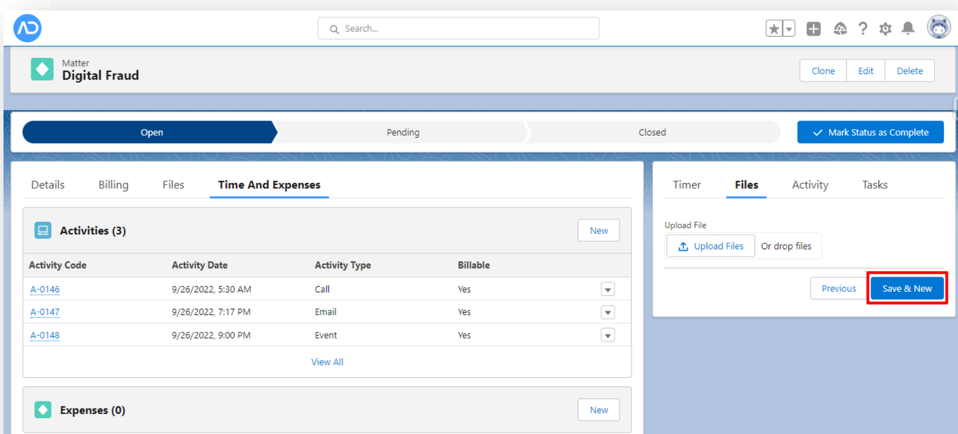
In the files section, there are two sub-parts that contain Documents and Files.



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

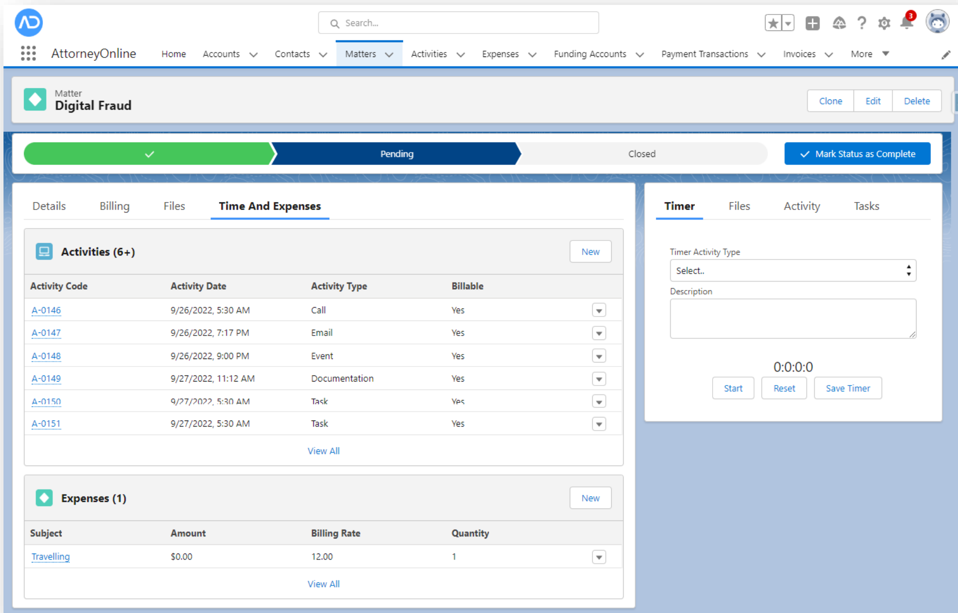


Here it shows files listing and option to upload new file as below:

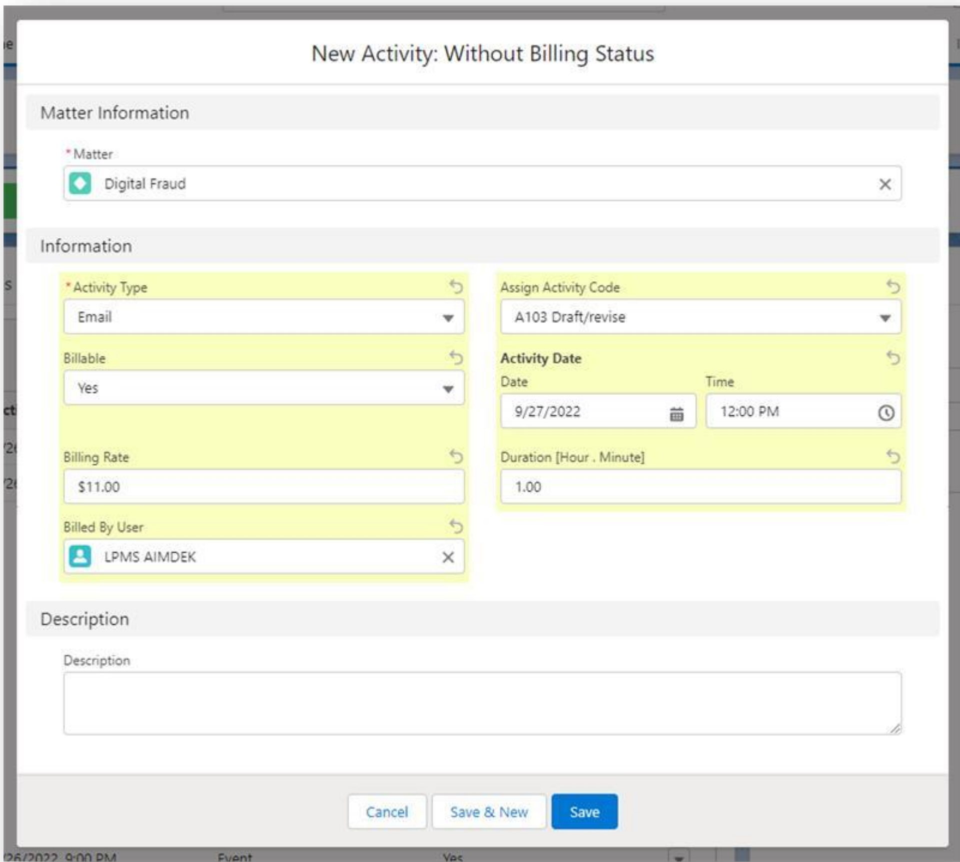


- ### Time and Expenses

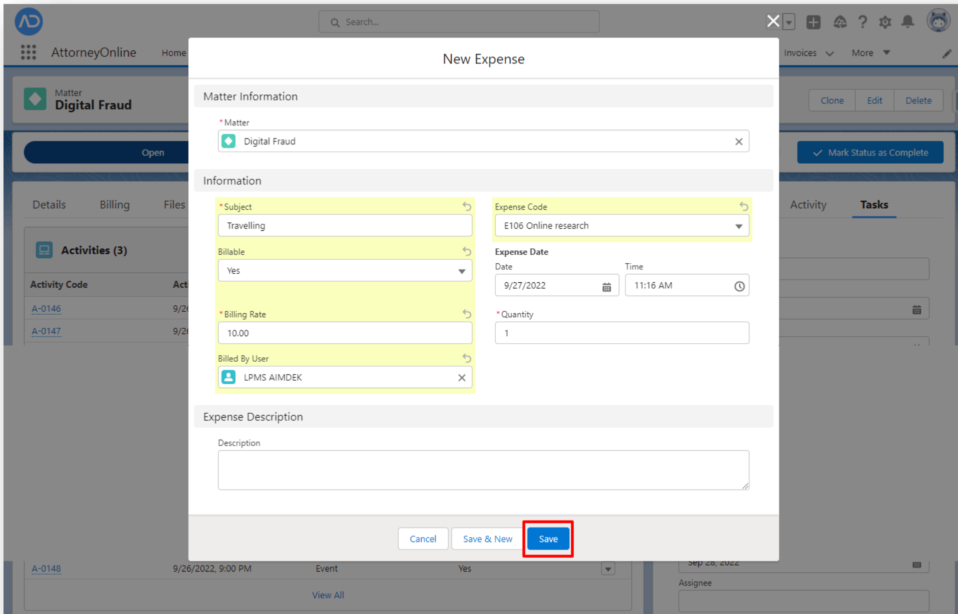
This section shows a list of activities and expenses. Activities list includes activity code, date, type and billable or not.



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



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



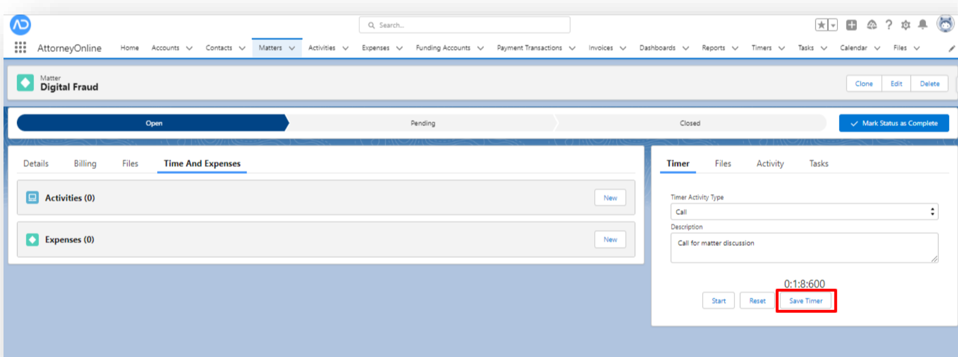
Users can define the expense code, subject, billable or not billable, quantity and rate, user for whom the expense is billed and description.

- ### 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:

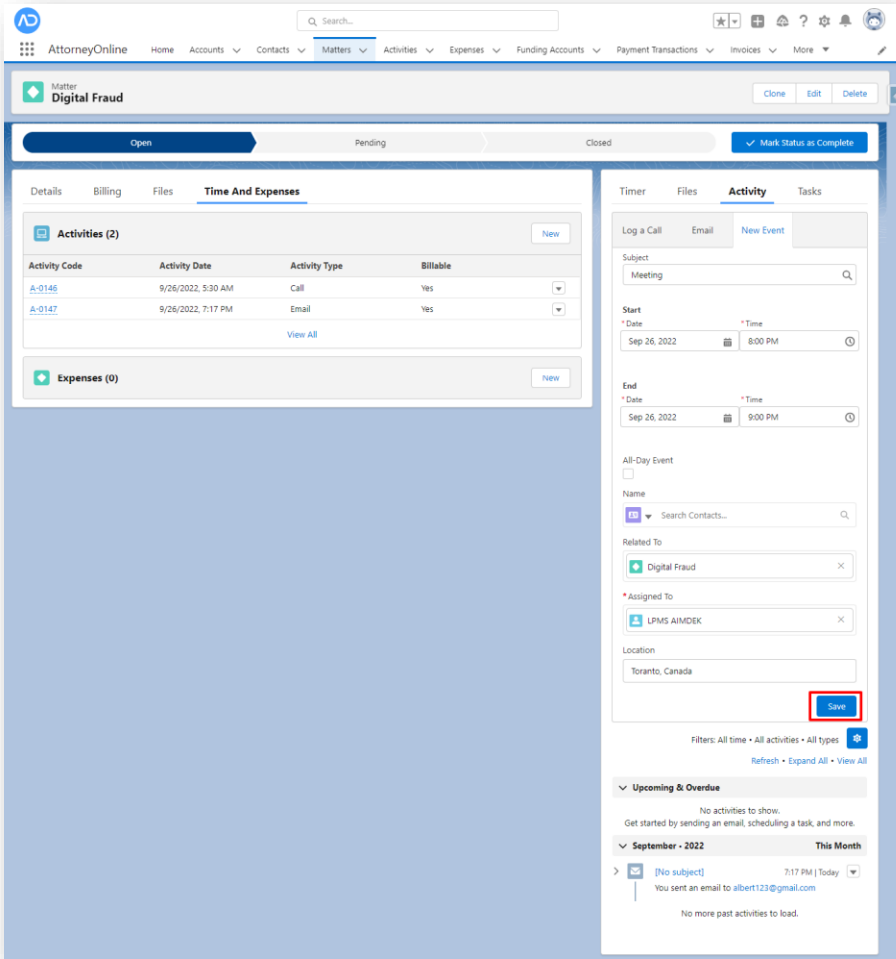


- **Activity**

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”

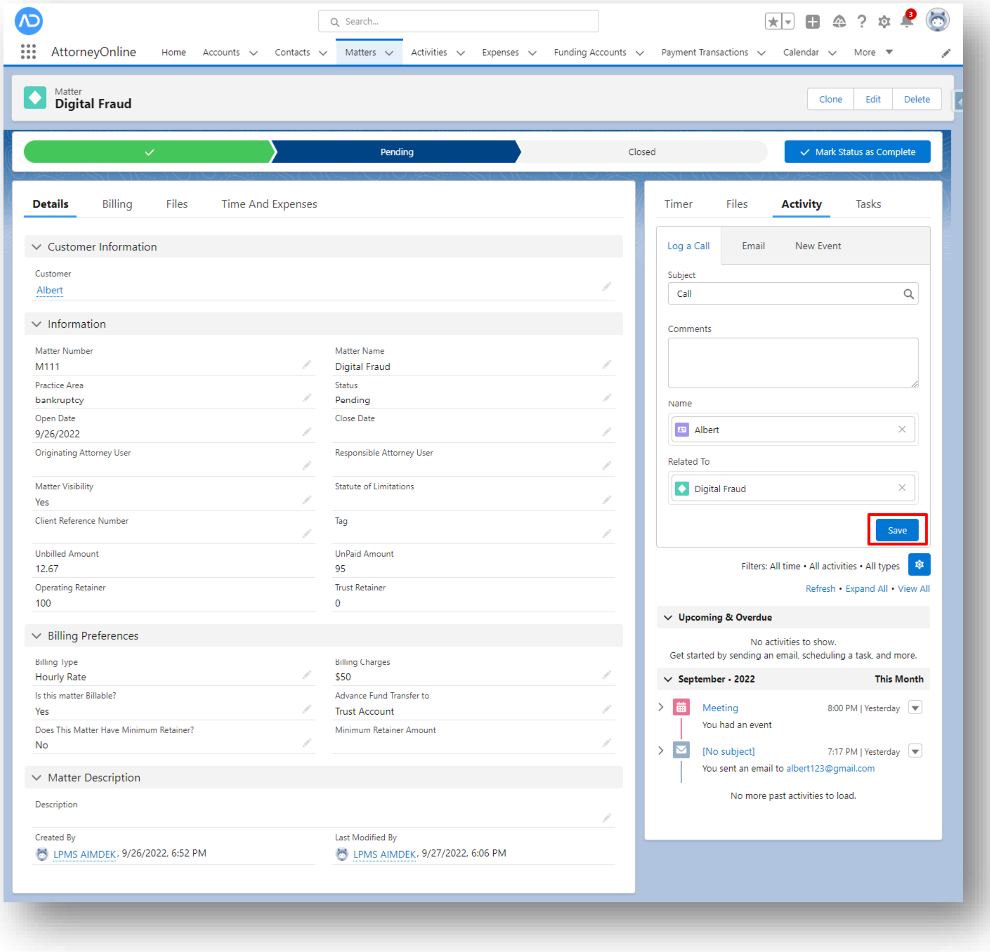
New Event:

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.



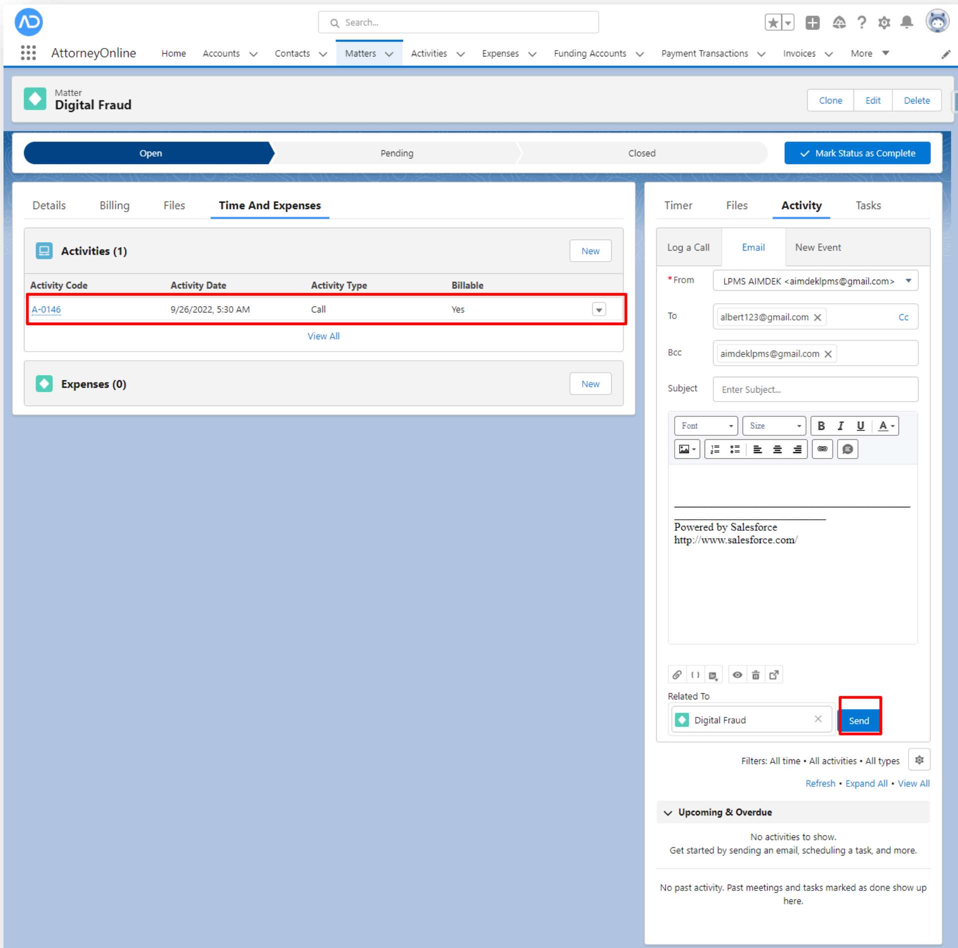
Log a call:

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:



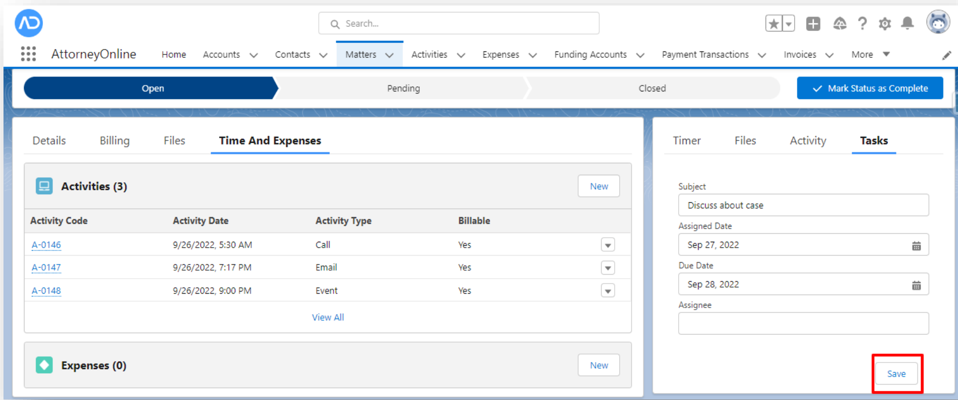
Email:

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.



New Task:

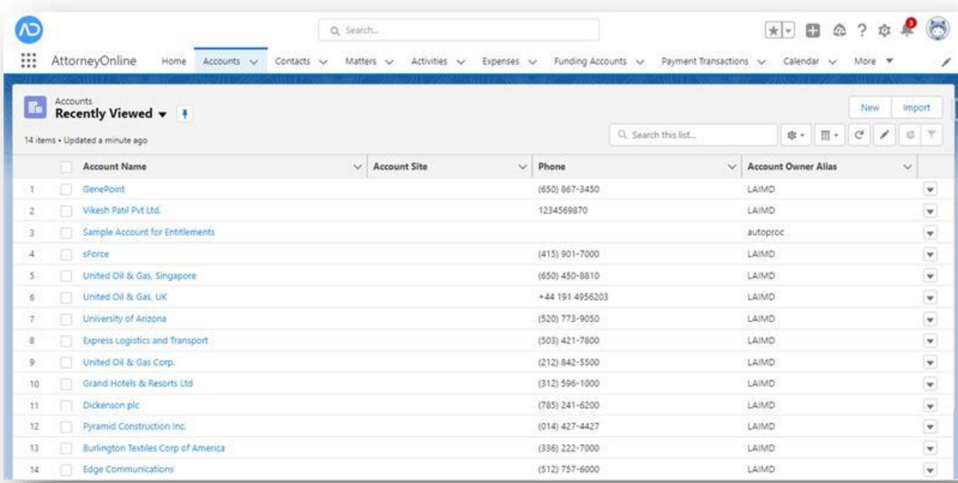
This section is used to create a “new task” without activity, where “Matter name” can be selected along with username. Also, it can state its current status.



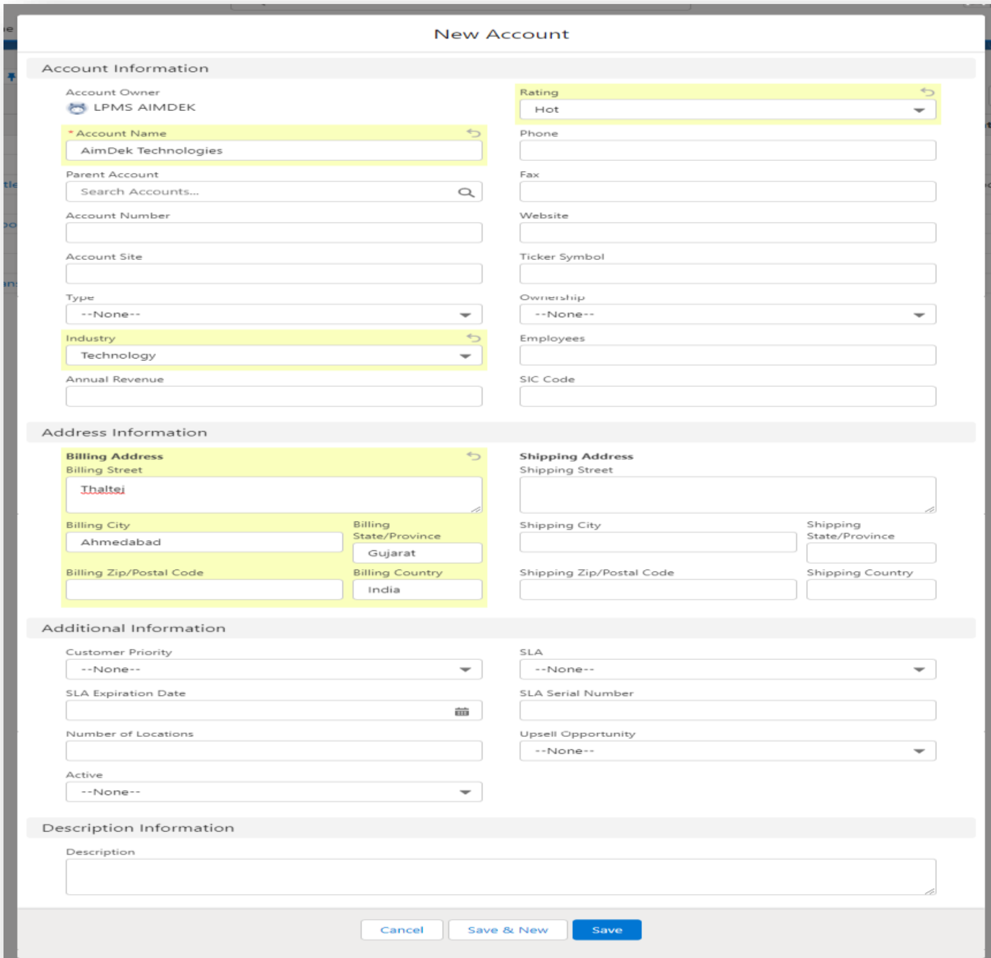
3.3 Accounts

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:



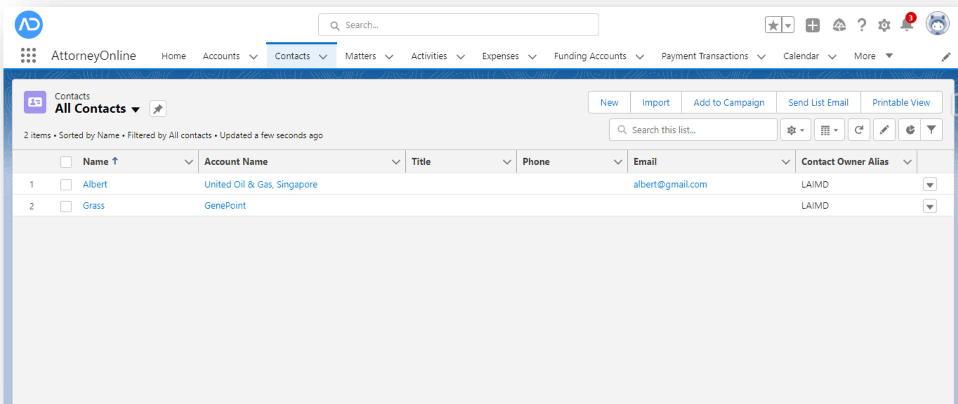
To create a new account, users have to fill below details:



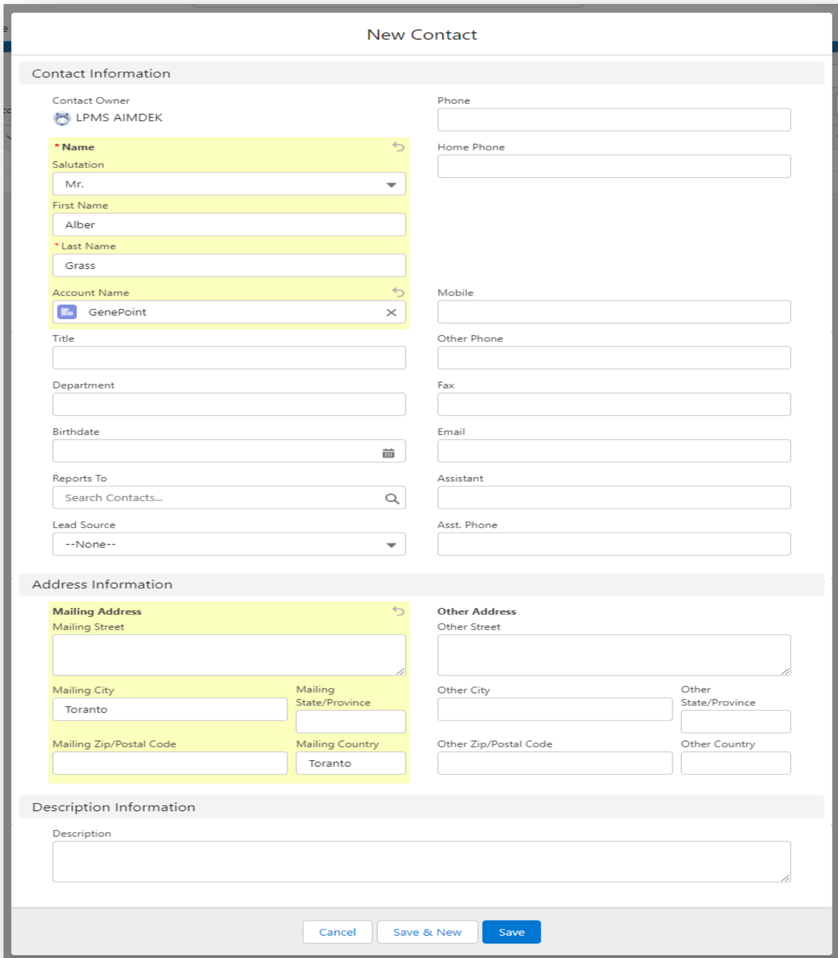
While creating an account, the user can define account type, rating, parent account, industry, and ownership.

3.4 Contacts

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

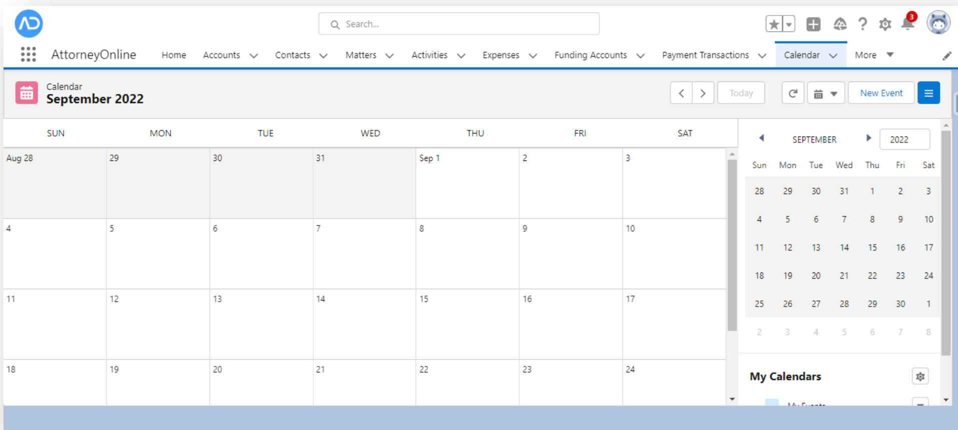


To create new contact, there is an option at top of the window, click on "New" button and it will open new window as below


New Contact
Contact Information
Contact Owner
LPMS AIMDEK
Phone
* Name
Salutation
Mr.
Home Phone
First Name
Alber
* Last Name
Grass
Account Name
GenePoint
Mobile
Title
Other Phone
Department
Fax
Birthdate
Email
Reports To
Search Contacts...
Assistant
Lead Source
--None--
Asst. Phone
Address Information
Mailing Address
Mailing Street
Other Address
Other Street
Mailing City
Toranto
Mailing State/Province
Other City
Other State/Province
Mailing Zip/Postal Code
Mailing Country
Toranto
Other Zip/Postal Code
Other Country
Description Information
Description
Cancel
Save & New
Save

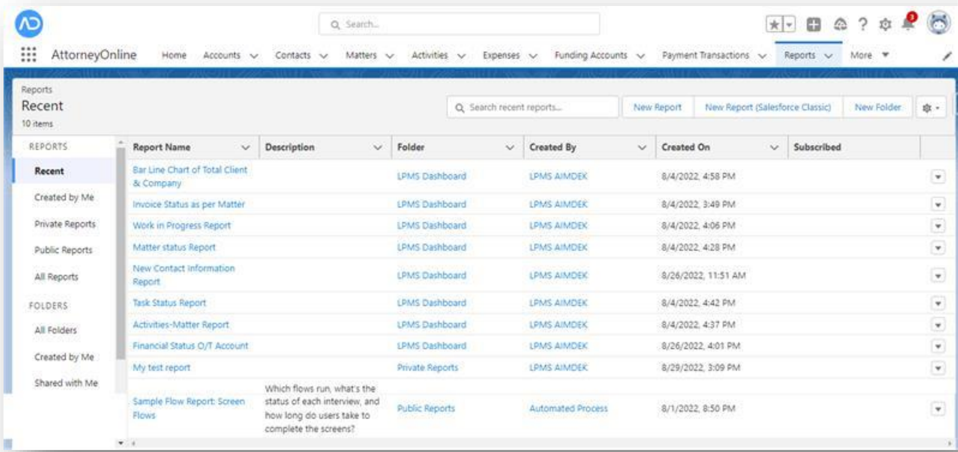
3.5 Calendar

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: o 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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