



# Case Management for Lawyers

**CASE MANAGEMENT SOFTWARE FOR PROFESSIONALS**



**USER HANDBOOK**

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## **CASE MANAGEMENT FOR LAWYERS SQL**

**CASE MANAGEMENT** software is designed especially for the management of professional law firms.

Upon designing the product, special attention was paid to making the product simple and user-friendly without reducing the efficiency of the application and its performance.

Its integration with the suites of MICRO AREA makes CASE MANAGEMENT the perfect solution for managing law firms and a direct link to client management products for professionals.

Although at first sight it may seem that many of the product's built-in features go unused by the firm, experience has shown us that these unused functions will help the professional firm to control its accounting and management functions which until now, may have been neglected and this will create greater efficiency within the firm.

CASE MANAGEMENT is equipped with client/server architecture on MS SQL databases which guarantees connectivity with the management of the law firm from any place as well as benefiting from complete integration with the rest of the advanced technology management software with no need for updating or transferring. More than 130.000 users of our management applications guarantee the efficient operation of this technology, until now reserved exclusively for large cooperations.

The product is integrated with the latest technology for Internet access and is equipped with features such as mail, advanced Communications Systems and automatic updating processes, ensuring that the user always has the most up-to-date version of the product on their computer.

### **System Requirements**

Minimum requirements for installing the CASE MANAGEMENT FOR LAWYERS

	<b>Client</b>	<b>Server</b>
Operating system	98-ME-NT-2000-2003-XP-Vista	NT-2000-2003-XP
Processor	Pentium II	
Video	Resolution 1024 x 768 pixels	
RAM	128 MB	
Hard disk	500 MB	
CR-Rom	For installation.	
Keyboard and mouse	Compatible with Windows.	
Internet connection	Recommended for product registration.	

## ***Starting with CASE MANAGEMENT***

The moment has arrived. You are prepared to use the program for the first time. We recommend that you keep your computer switched on and follow the steps described in the following chapters carefully.

**Before initiating the program, check that the graphics on your computer screen are configured to 1024x768 pixels.**

Click on the start button. Slide the cursor of your mouse to the Programs panel, search for and then select CASE MANAGEMENT FOR LAWYERS.

You can also open the program by double clicking on the icon which will have been created on your desktop.



A window like the following will appear on your screen:

When you start up the program, the "Start session" window will appear, in which you must enter your username and password. The default username for the program is "Administrator" and the password is "MAGEST".

To create new users, consult the Utilities menu.

The program can be used by any number of users holding licenses purchased from Micro-Area Inc.

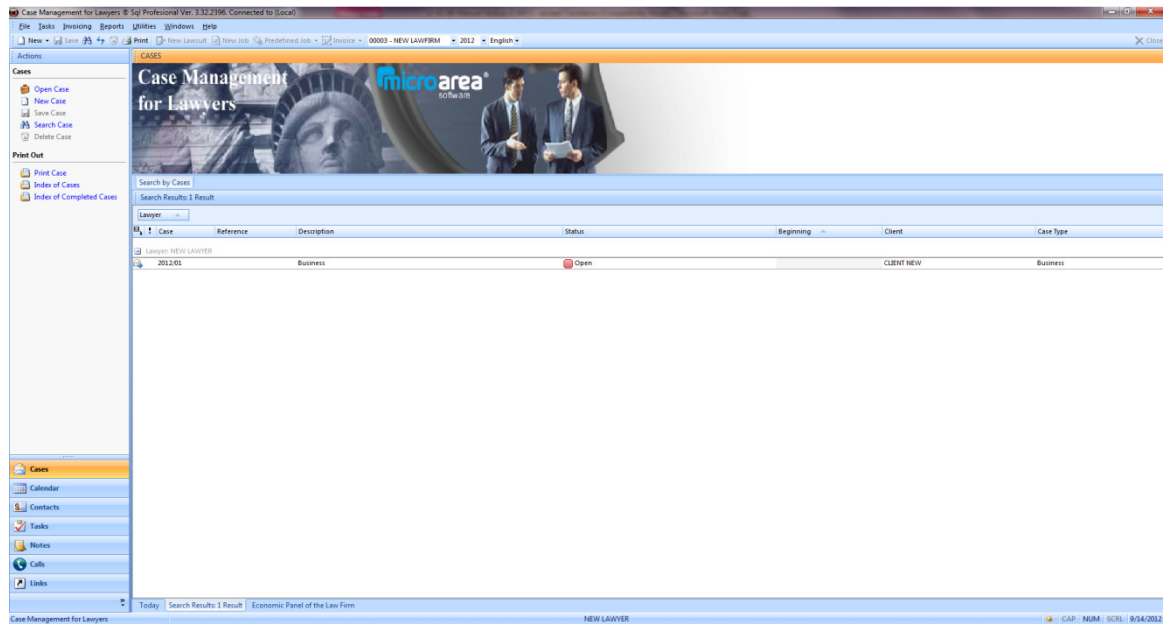
When entering the username, an error message will appear if:

- The username is incorrect.
- The username is already in use.
- The number of purchased licenses has been exceeded.

## Main Screen of Case Management for Lawyers

To make running the program easy for the user, we have created a logical method of work used by companies and have equipped the program with various quick-access tools.

The main "Case Management for Lawyers" window looks like this.



## Toolbar



From the toolbar you can manage the program configuration and invoicing options:

The toolbar includes the following options:

**File:** The file menu displays options for entering the program registration data, details of professional cases, lawyers, clients and lists of consultations and relevant data such as the tax office or ZIP codes

**Tasks:** Gives access to the program's main options; Cases, Calendar, Contacts, List of tasks, Calls etc...

**Invoicing:** This option allows you to print out invoices, budgets and to manage the sales and payment logs.

**Reports:** In this menu you can find all lists, reports and program information statistics which may also be printed.

**Utilities:** Use the utilities menu for program configuration.

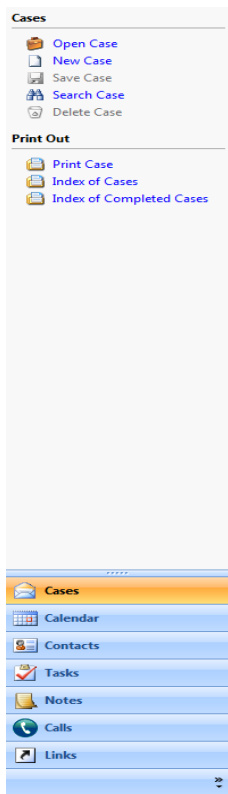
**Windows:** This menu displays all the windows which you have open at any one time.

**Help:** Use this menu to access the program’s information services (support, help, web pages...).

### Side Menu

To the left side of the screen, a side menu is displayed consisting of two sections:

The upper part of actions will vary depending on the option which is selected at the lower section of the side menu.



It is possible to see the actions in more detail in the help menu in the corresponding section of each option.

**Cases:** This option is used for managing professional law cases as well as indicating the case in which they are found.

**Calendar:** The calendar allows you to keep a daily and monthly log of the data introduced in the tasks lists.

**Contacts:** Use this section to organize your regular contacts in alphabetical order.

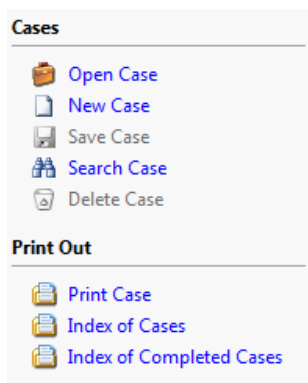
**Tasks:** Use this feature to enter outstanding tasks. These tasks will then appear in the calendar.

**Notes:** This option allows you to enter reminders.

**Calls:** This option allows you to keep a log of outgoing and incoming calls.

**Links:** Use this option to create direct links to applications and web pages.

### Cases



This window allows you to enter, modify and close files coded in the program.

When opening the window for adding cases, only the following options are authorized:

**Open Case:** By selecting this option a pop-up menu will appear displaying all the cases in which the lawyer who began the session is involved.

**New Case:** The program automatically generates a new code for adding a case and all fields will be left blank.

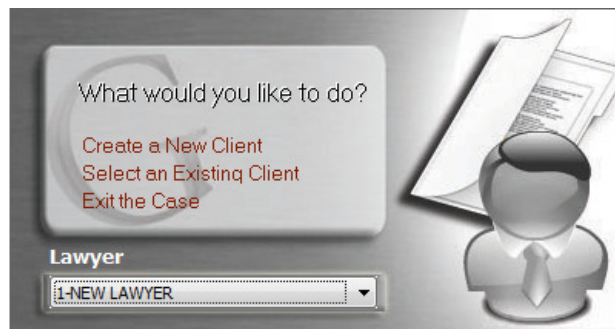
**Search Case:** This option shows a menu which can be used to search cases by selecting a factor which will distinguish it from other cases.

**Print Cases:** Use this option to print a document with all its corresponding data.

**Index of Cases:** An index in which all cases are displayed.

The first time you access this option, select "New Case".

Immediately after a window will appear with the cases and a welcome message will offer the available options to begin working.



- **Create a new client:** This option opens a window for the entry of clients so that the necessary data can be coded and stored.
- **Select an existing client:** This option opens the list of clients available in the database to select the client in question and manage that client's related cases.
- **Exit the case:** Closes the welcome window and displays the main cases window.
- **Lawyer:** From here you can select the lawyer in charge of the case you wish to create. This option is only available to administrator users of the program.

Once the client has been created or selected from the list you can start working on a case.

At the top of the screen and to the right of the case number the following options are displayed: the **Reference, Beginning and Close Dates**, whether the case is **Public** to other lawyers, the **status**, the **type** for quick identification when searching for a case by using colour codes, the **results** etc...

Number: 01201	Reference:	Beginning: JJ	Close: JJ	Status: 1-Open
Type:	Result: Pending	Pending	Computerized Location:	<input checked="" type="checkbox"/> Public Balance

In the lower section of the window, the main client of the case is displayed.

Perez Garcia Luis

The options in this lower section contain the details which were added when the case was created. To change the status of the case, use the drop-down "Status" menu and



choose the relevant option; if the case is open, unresolved, in process or closed. You can create new status for cases by accessing the File menu, then by selecting Status. From this menu you can modify the current status of a case as well as include new options.

The case is now created and your first task is to enter a brief description of the case.



Once the description has been entered, a dossier can be created and new lawsuits added. Click on "New LawsUIT" in the toolbar and the following window will appear.



In this section, firstly select the legal position of the lawsuit which you intend to create: plaintiff, defendant or others. Following this, you can select the type of case you wish to work with: "In Court", "Out of Court" or "Others" which have been predefined in the "Types of Lawsuits" option of the File menu.

The next step is the choice between court and legal body where the case will take process. By clicking on the magnifying glass icon, the list of courts which have been entered in the "Courts" section of the File menu will appear.

In the same way you can select the proceeding of the law case. You may select an existing one or enter a direct description of the proceeding.

The last field required in this window is the number of cases assigned. Enter the code and a brief description or title.

After saving the entered data in the "New LawsUIT" section, a new line will automatically appear in the main window of the case in which the start date and time must be entered. If you press "ENTER" on your keyboard in the provided space, the date and time recorded on your computer will automatically appear. A new date and time can be indicated by entering them in the relevant space.

Case Description						
Business lawsuit						
Lawsuits and Jobs						
Legal Body	Number	Type of Case	Initial (\$)	Final (\$)	Balance	
1 - First Circuit Bankruptcy Appellate Panel Main Office		1 8 - Bankruptcy	\$2,000.00	\$0.00	-60.00	
Date/Start Time	Date/End Time	Type	Provider	Recipient	Description	Amount
9/14/2012	13:47		1		contract	60.00

**Date/Start Time and Date/End Time:** In this box the date and time of the case will be registered.

**Type:** Here you can use the drop-down list to choose the type of case and what it entails. The options are: Free, Advanced Payments, Payment, Expenses.

**Provider and Recipient:** In the "Provider" and "Recipient" fields, the person in charge of the case and the recipient may be indicated. In order for a person to be appear in the list, that person must already be included in the case.

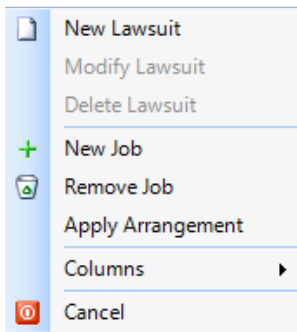
**Description:** In this section, information related to the case can be entered. A more detailed description can be made in the upper section of the main "Cases" window, entitled "Case Description".

**Amount:** Here we enter the amount of money we are charging the client for specific job within the lawsuit. **D.** In this section you can attach external files which are stored on your PC and which are related to the case, for example, scanned copies and other documents of interest.

**A.** This button is for creating a new job warning for the case. You can indicate if you would like a job warning, the date when the warning will be displayed and a description. This information will be stored in the list of tasks and the warning will be displayed on the date indicated.

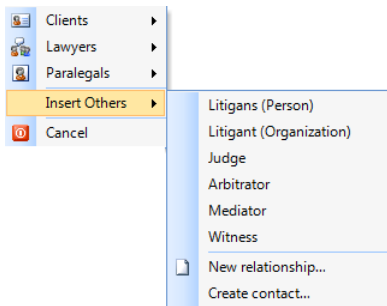
Lawsuits and Jobs						
Legal Body	Number	Type of Case	Initial (\$)	Final (\$)	Balance	
30 - New Hampshire District Court Main Office	10	12 - Collections		\$0.00	-200.00	
Date/Start Time	Type	Description	Amount			
9/16/2012	15:26	1 Contract	200.00			

Once the lawsuit and job details have been entered, in the left section of the main cases window you will be able to see the lists of people related to the case. Here the list of lawyers involved in the case will be displayed and by clicking on the "+" sign next to the name, you will see the case codes which are being managed by the corresponding lawyer. By double clicking on the selected code, the case will be loaded and ready to work on. Otherwise, by double clicking on the person in the list, you will access the relevant file.



If you wish to add a new lawsuit or job, click on the relevant option in the toolbar (in the current case window) or click on lawsuits and jobs with the right button of the mouse and the window displayed on the left will appear. Here, you can select options to modify a lawsuit or delete jobs and lawsuits. It is also possible to add and delete columns from the list.

To add people related to the case, place the mouse over the space under "Personnel" and by clicking on the right button of the mouse you can access the available options:

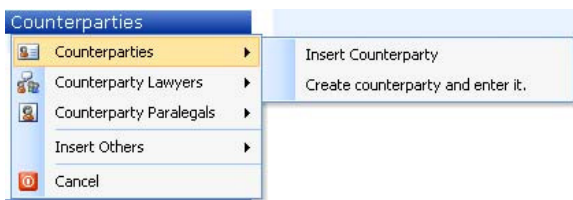


You can insert clients, lawyers and paralegals as well as the following options:

Insert others: with this option you can insert other types of people which although not principal plaintiffs in the case, their role is important for the development of the case.

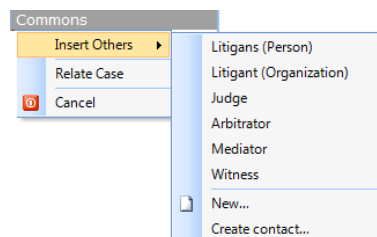
By selecting this option a list of personnel already registered in the program (accessed from the File menu) will appear.

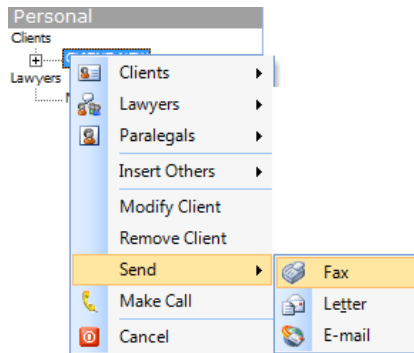
You can also access the window for entering new relationships by selecting "New". From here you can include a list of personnel generally related to the case such as administrator, skilled people, accountant, doctor...



The list of personnel designated "Counterparties" is available to enter information regarding personnel of the counterparty related to the case. Entering data in this section is a similar process to entering data under "Personnel".

"Commons" also works in the same way. In this space you can enter personal related to the case involved with both sides of the case. You can also enter other law cases to relate them to each other.

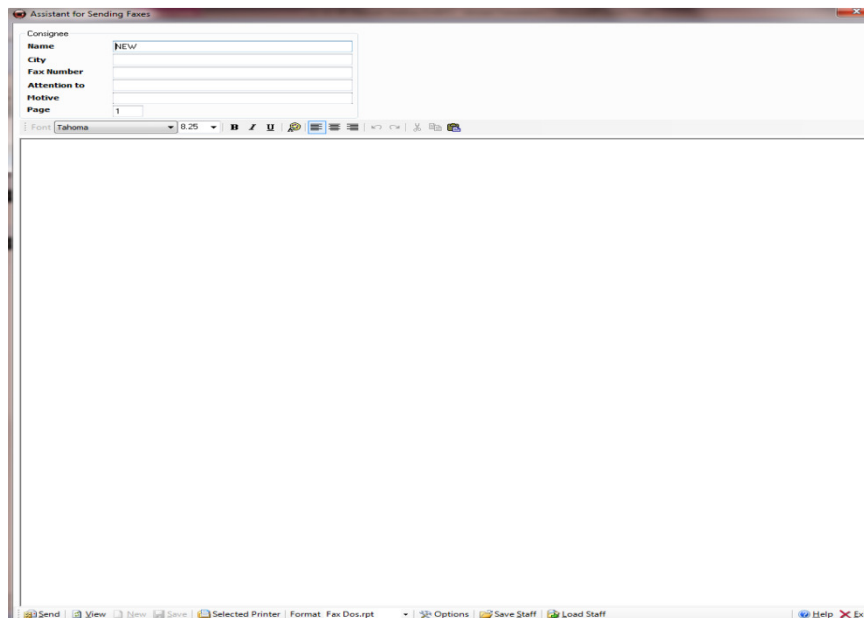




From the Personal, Counterparties, or Commons sections, you can easily communicate with the people and courts which have been added to the case. In order to do this, click on the person in question with the right button of the mouse and a menu will appear with the options: Fax, Letter or Telephone.

**Sending a Fax:**

With this option you can create and print a fax using different formats before sending.



When you print the fax to proceed with its sending, a job will be created in the selected lawsuit to inform you that the fax has been sent.

Date/Start Time	Type	Description	Amount	D	A	Save
9/16/2012 15:26	1	Contract	200.00			

**Sending a letter:**

This option allows you to create letters with predefined data on the form, ready for printing and sending to the required recipient. In the same way as sending a fax, a job will be created in the case indicating that the letter has been sent.

**Sending an E-Mail:**

This option allows you to send an email directly to the selected recipient, after filling in the necessary details which appear in the window. If your mail account has been

configured with Microsoft Outlook to send emails, a job will be created in the selected lawsuit indicating that the email has been sent.

Furthermore, you can include emails made on Microsoft Outlook by dragging them directly from the mail application to an open case. Thus, a job will be added indicating the mail which has been added to the lawsuit.

### Making calls:

From this option, a window will open which allows you to transcribe both outgoing and incoming telephone calls as proof of communication with the selected person. This option creates a job in the selected case indicating that a call has been made.

At the top of the cases window, you will see a tab displaying the case number of the current case you are working on. You can open as many cases as required. To open a case without closing the one which is already open, go to the Actions menu and select "Open Case". Select the case you wish to open from the list and a new tab will be load automatically in the main window. You can switch between windows by clicking on the relevant tabs at the top of the screen.

The actions window will appear hidden so that the main window can be seen in its entirety. To see its contents, click on the upper tab which is situated in a vertical position at the side of the window.

It will be highlighted in orange. By clicking on the tab, the window is moved and displayed. If you look at the upper right part of the window, a symbol like a

thumbtack appears. If you click on the symbol the actions windows will always be shown on the screen and if unmarked will remain hidden.

At the top of a case, you will also find two tabs within the same file; "Case" and "Financial Information of the Case". The first shows the case itself, the relevant data, the personal related to the case and the lawsuits and jobs which are being undertaken within the case. The second contains the relevant data within three sections related to the financial aspect of the open case, displaying estimates, invoices and collections received or related to the case.

Amount Estimated	Amount Invoiced	Amount Collected	Outstanding Amount	Date of the Last Collection	Amount of the Last Collection
104.25	0.00	0.00	0.00		0.00

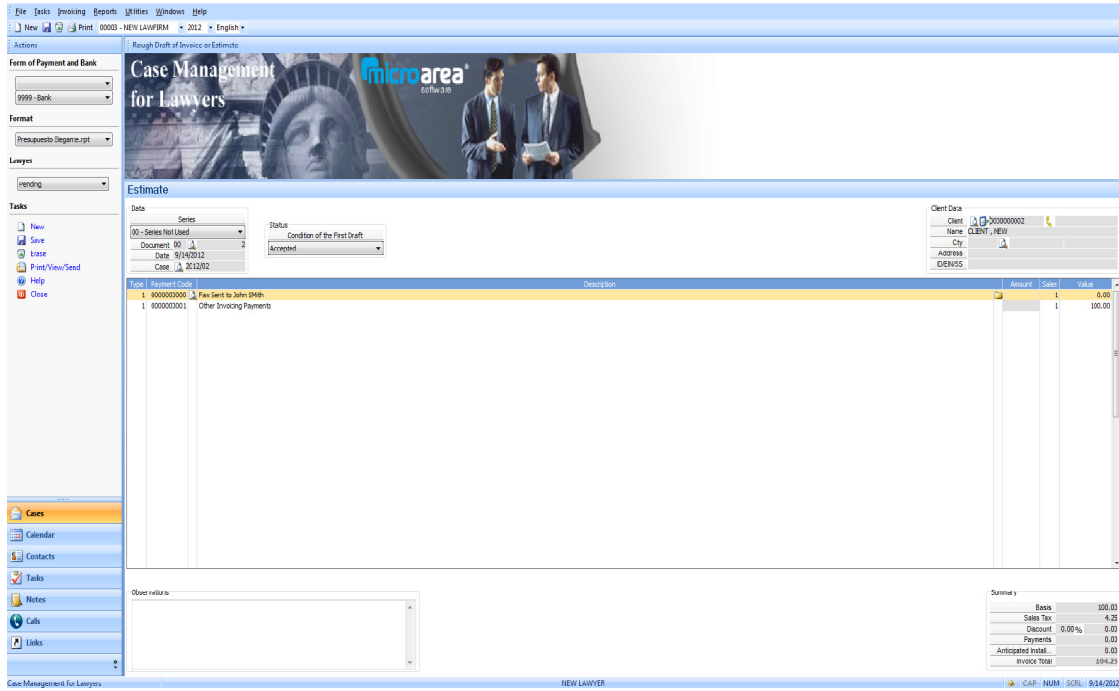
Estimate Number	Channel	Amount Estimated	Date	Status
2	00	104.25	9/14/2012 3:15:38 PM	Accepted

### Creating Estimates

Within the dossier it is possible to create as many estimates as necessary for the jobs of the case. To do this, open the "Financial Information of the Case" panel and click on the "Estimates Issued" tab with the right button of the mouse. Select "Create New Estimate" and the assistant for creating new estimates will appear, which will guide you the same way as when creating invoices in simple steps to select the jobs you wish to add to the estimate and will allow you to add empty lines and to select the client and method of payment of the estimate you are creating. When the assistant closes, the estimate will appear in the list of issued estimates.

Estimate Number	Channel	Amount Estimated	Date	Status
2	00	104.25	9/14/2012 3:15:38 PM	Accepted

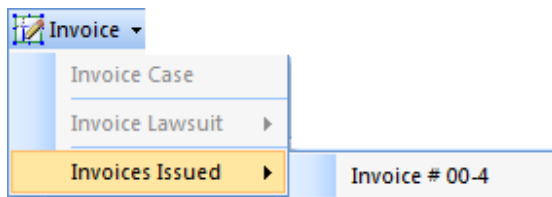
From here you can click on the + sign for drop-down information or change the status from the "Status" column to indicate whether accepted, modified or repealed by the client. If you wish to edit an existing estimate, click on it twice with the left button of the mouse and the "Lawyer's Bill" window will appear. This window can also be accessed from the "Invoicing" menu.



You can use this screen to create, edit, print and delete estimates of your law firm. If you wish to edit an existing estimate, click on the magnifying glass symbol next to the "Document" tab and select the estimate you wish to modify from the list. Before making any changes, click on "Save" on the "Actions" panel.

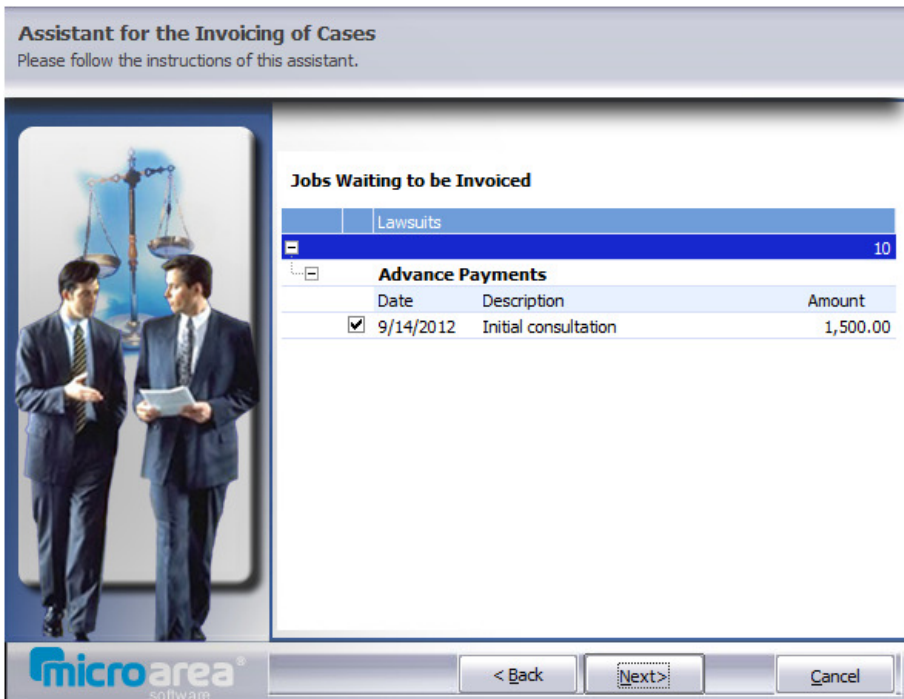
### File Invoice

Once you have jobs in the lawsuits to be invoiced to the client, these can be invoiced to the client from within the same file, using the option "Invoice" at the top of the screen and selecting the relevant part; or if you wish to invoice the entire file or jobs of different lawsuits, you can select "Invoice Lawsuit" to select just one of the lawsuits of the case.

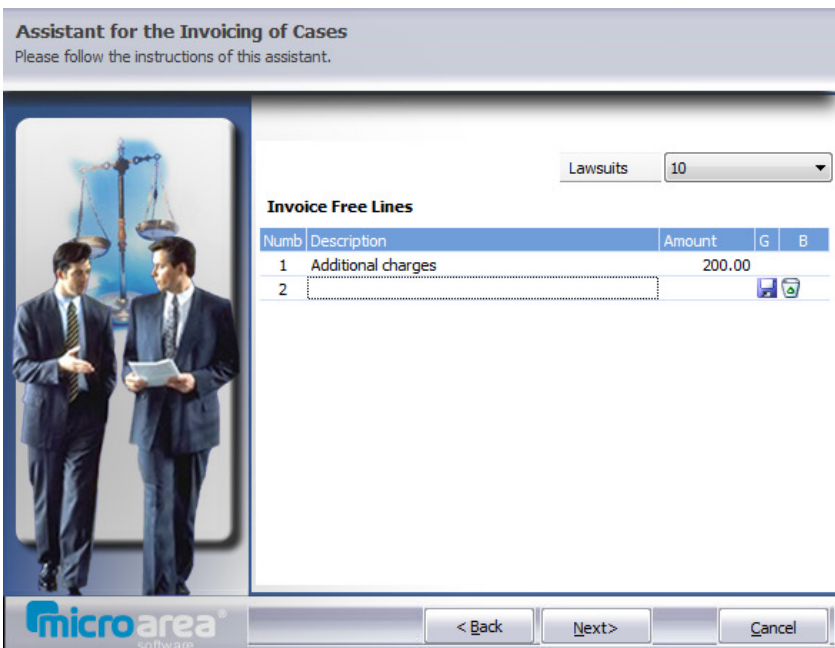


When you select one of these two options, the assistant guide you through the process for invoicing.

In the second step of the invoicing assistant, you can select the jobs you wish to include in the invoice and which ones to exclude by checking them on the list.

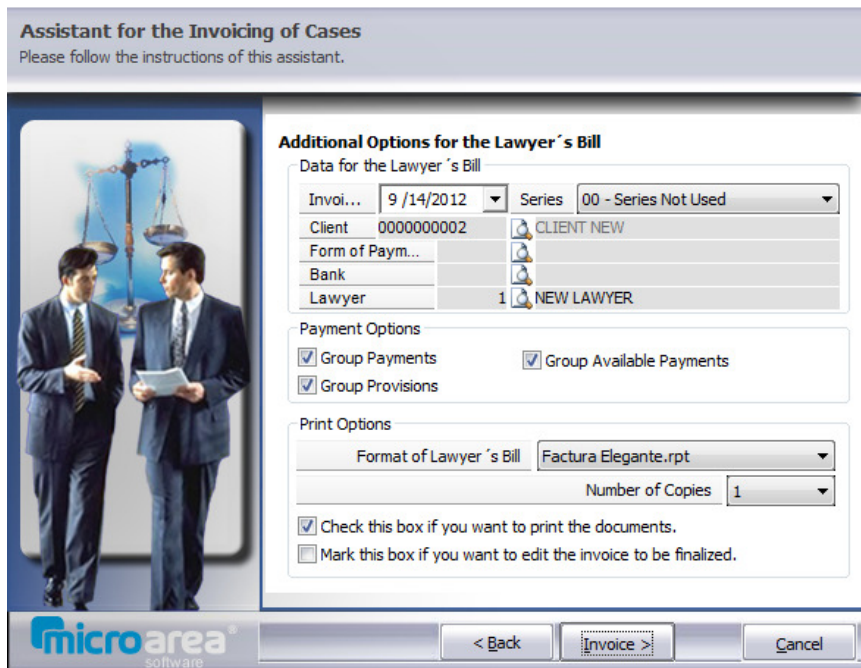


Once all the jobs you wish to invoice have been selected, click on "Next" and the assistant will allow you to include last minute free lines in the invoice, indicating in which lawsuit they must be included and the amount to be invoiced.



Click again on "Next" and indicate the client to whom the invoice is to be issued, the channel, form of payment, the bank, the printing format and if you wish to print the invoice immediately after closing or editing it.



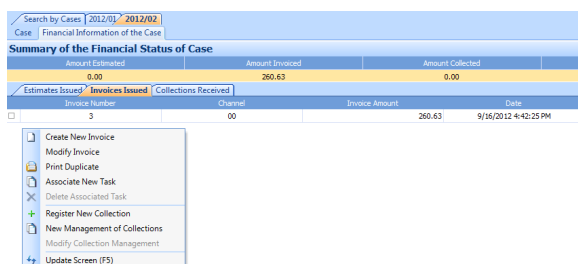


Once all the details have been entered, click on "Invoice" and the application will create the file invoice which can be reopened from the "Invoicing" menu by selecting "Create/Modify Bills and Invoices " or simple by double clicking on the specific invoice from the panel inside the "Financial Information of the Case" tab.

Within the case you will see that invoiced jobs are highlighted in colour and in their lawsuits you can add the lines of the invoice totals with their number.

Lawsuits and Jobs						
Legal Body	Number	Type of Case	Initial (\$)	Final (\$)	Balance	
30.- New						
<input type="checkbox"/> Hampshire District Court Main Office	10	12.- Collections		\$0.00	0.00	
Date/Start Time	Type	Description	Amount	D	A	Save
9/16/2012 15:26	1	Contract			200.00	
9/16/2012 16:41	1	Lunch			50.00	
9/16/2012 16:42	4	Ammount			250.00	
9/16/2012 16:42	4	Sales Tax Total			10.63	
9/16/2012 16:42	4	Invoice (# 3) Total			260.62	

To make working with the created invoice easier, you can access the "Financial Information of the Case" panel where you will find all the invoices associated to the open case in the "Lawyer's Bills" list and from here you can carry out various actions.



**Create New Invoice:** Launches the assistant for invoicing cases to create a new invoice.

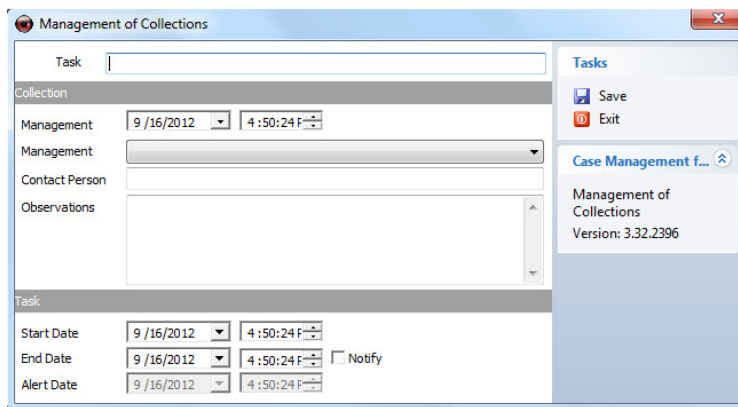
**Modify Invoice:** Open the "Create/Modify bills and invoices" window to edit the selected invoice.

**Print Duplicate:** Displays the printing window.

**Associate New Task:** Allows you to create a task which will appear in the calendar and will remind you when the invoice needs to be collected.

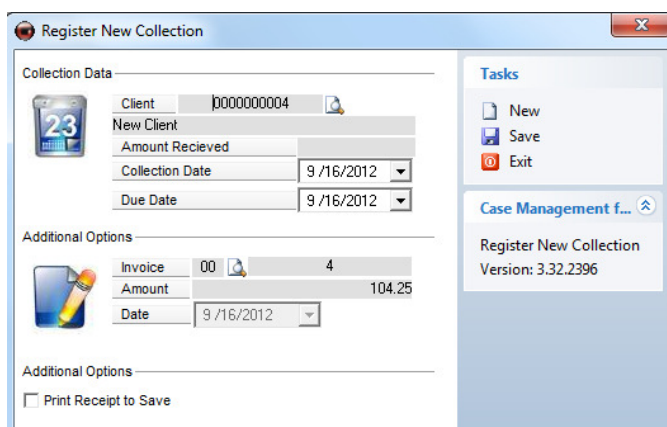
**Register New Collection:** Creates a new collection for the selected invoice which will then be displayed in the "Received collections" section.

**New Management of Collections:** Allows you to create a register to manage collections from the client.



When an invoice is created, its associated jobs are highlighted in a special color to indicate its status as invoiced and it is not possible to make a modification. However, if you have accidentally invoiced a job and need to modify this, you can delete the created invoice by accessing the "Invoicing" menu and selecting "Create/Modify bills and invoices".

From this screen, if you wish to select an existing invoice, click on the magnifying glass next to "Document" and select the invoice you wish to modify. You may also modify the lines of the invoice, print it or delete it.

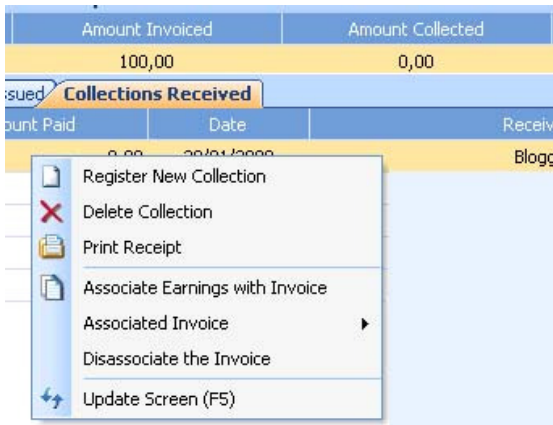


### Register of Collections

When you wish to register the collections of invoices, you can create collections and associate them with invoices of the case from the "Collections Received" panel. Click on the list with the right button of the mouse and select "Register new collection" where you can indicate the client, the amount and the invoice associated to the collection. You can make as many

collections as desired and choose whether to associate them to invoices in the same file.

You can choose from the following options for collections:



**Register New Collection:** Create a new collection in the file.


**Delete Collection:** Deletes the selected collection.

**Print receipt:** Prints a copy of the receipt.

**Associate Earnings with Invoice:** Displays the invoices created on the file to associate the selected collection to the indicated invoice.

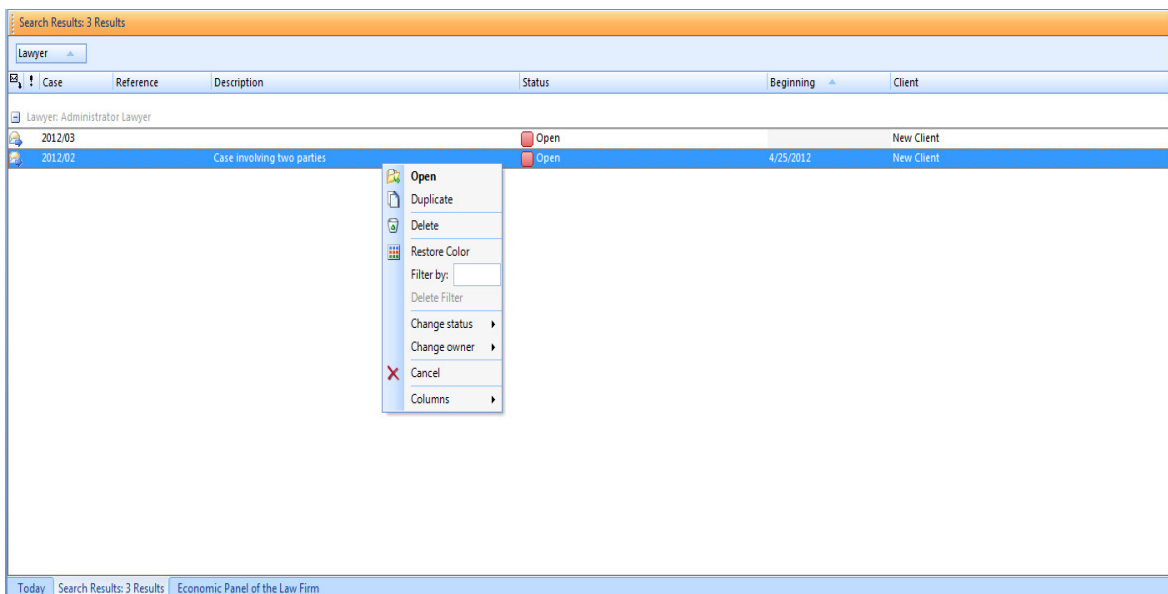
**Associated Invoice:** Show options of the invoice associated with the selected collection. You can print or edit the associated invoice.

**Disassociate the Invoice:** Deletes the collection’s association with the invoice.

Once the case has been created and saved, it appears in the “Search Case” list. Alternatively, you can refresh the window by clicking on the list with the F5 key or the  “Refresh” button in the toolbar.

### Search Case Panel

This is the main panel for searching and opening existing cases. You can search with the help of various elements to find a specific case. From the list, you can open, copy, delete, change color or filter elements of the search.




To open a case, click twice on the one you wish to open or select the option “Open” by clicking on it with the right button of the mouse. You can also select the option “Open Case” and search for the file you wish to open.

From the "Columns" option, you can indicate which columns you wish to view or not.

### Economic Panel of the Law Firm

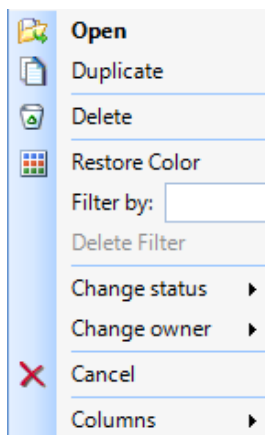
This panel works in the same way as the previous one but allows you to quickly view the relation of economic quantities with the level of cases which are being managed, displaying the estimates, invoices, collections and pending collections and their amounts in the list.


### SEARCH CASES

When you have many existing cases and you need to look for one or several specific cases, you can use the search tool. Click on "Search Case"  and a window will open allowing you to search for the case you want by filling in the fields.

Once you have filled in the fields with the necessary details, you can add a name to filter the search and then click on "Save" on the "Tasks" menu. Thus, whenever you wish to use this search again, you will not have to create it again. Click on "Search".

The program will search for cases and will indicate which "Saved" search you are using as well as display elements found in the list.

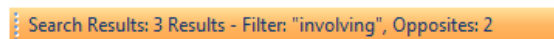


If you wish to display all the cases again, press the F5 key over the list of cases or the refresh  button in the toolbar.

Another way to find a case is through the use of a quick filter which is indicated under the option "Filter by:" which appears if you click the right button of the mouse on the list of cases.

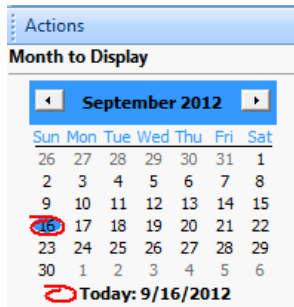
The quick filter is only applied to cases in the list. For example, if you previously used the search window to filter files of exercise 2007 and then you write "Lawsuit" in the quick filter, only cases of exercise 2007 will appear with the word "Lawsuit" in some of the columns.

The program will indicate the use of the quick filter in the name of the tab, indicating the keyword and the number of cases found.



When you wish to delete the quick filter, click again on the list with the right button of the mouse and select "Delete filter".









### Calendar



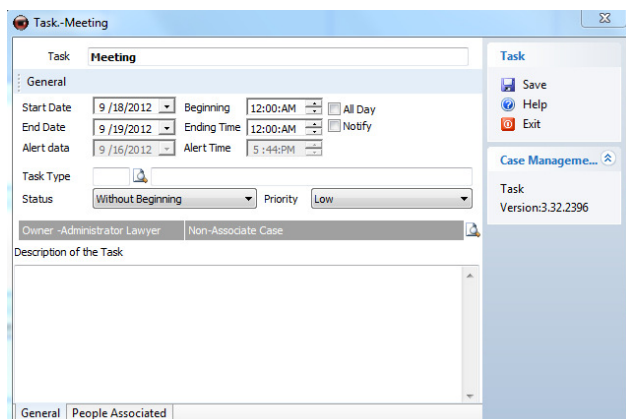
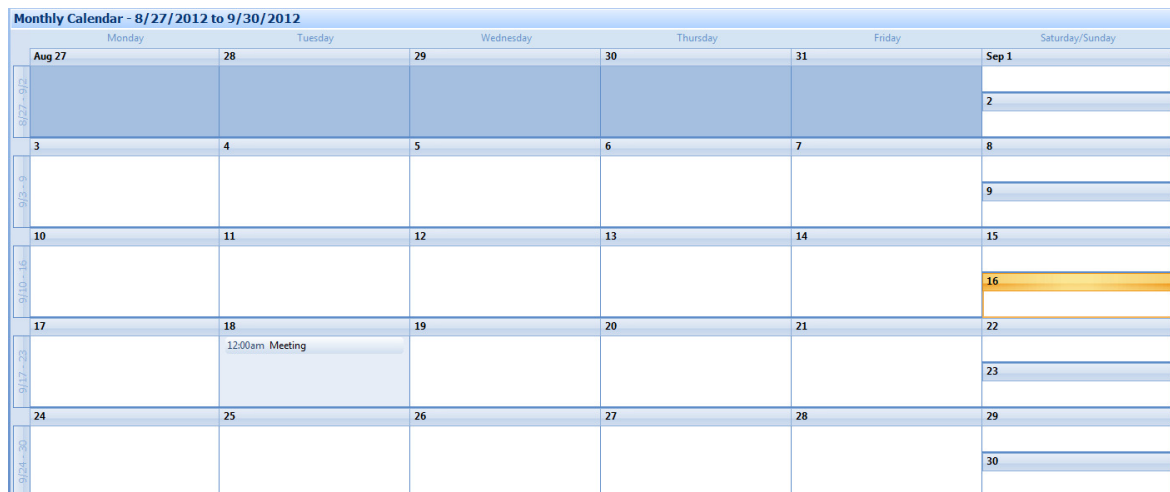
From this window you can consult your monthly agenda and transfer tasks from one day to the next.

To use this window, choose the month which you wish to work on at the top left side of the window.

Via the main button bar of the window you can:

-  Create a new task
-  Modify a task.
-  Delete a task.
-  Print the calendar.
-  Show the daily calendar.
-  Show the business week
-  Show the weekly calendar
-  Show the monthly calendar

Once the corresponding month has been selected, each day will appear as a box in the centre of the calendar screen.



To enter a new task into a particular date, put the cursor over the box of the relevant day and click on it with the right button of the mouse, and then select "New Task".

In the new task window, enter a brief description of the task.

The next step is to choose the start date – the date when the task will be shown.

The start date is set automatically to 08.00 and the end date set automatically to 08.30.

Task Meeting		
People Associated		
Code	Name	Relationship
3	LAWYER 1	Lawyer

The options “All Day” and “Notify” can be used to push the task throughout the duration of the day. In such a case the beginning and ending times will remain deactivated.

+ Add X Delete	
General	People Associated

The “Notify” option will display a notification upon initiating the program of the task you have created for that day. If you activate this option, the notification date and time will be enabled in order to

choose when you wish to be notified of the task.

Under task type, you can choose one of the listed options in the File menu.

In the following sections you may indicate the condition of the task: Without Beginning, Started or Finalized.

The priority option allows you to rate the importance of the task with Low, Normal or High.

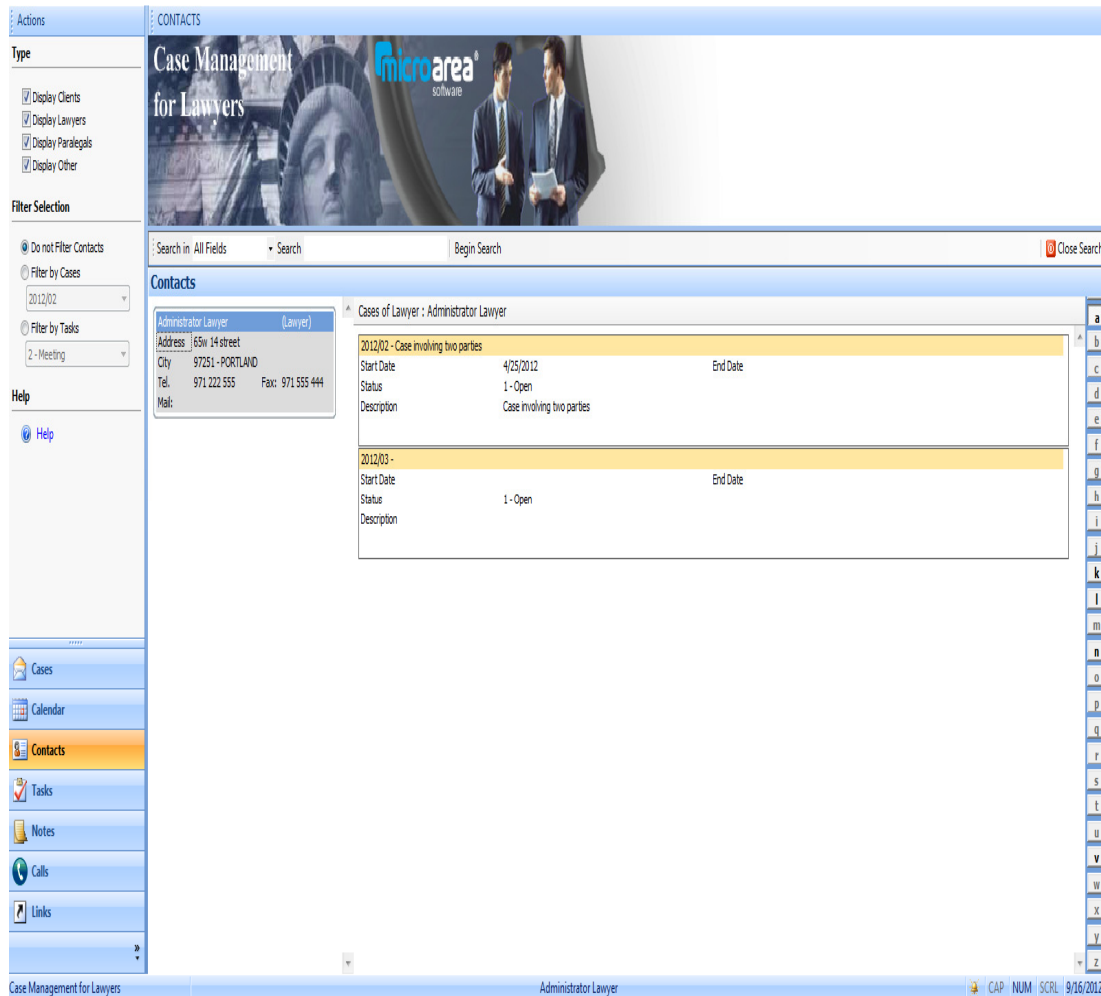
In the section entitled “Description of the Task” you may enter the relevant information of the selected task in more detail than the brief description in the title of the task.

In the “People Associated” section, you may add those people involved in the task. To make a new entry, click on “Add” and select the group of people to which the entry belongs: for example, lawyer. The list of people included in this group will then be displayed. By selecting a person, it will appear in the list at the top.

To delete the person or add new people, select between the options “Add” and “Delete” at the bottom of the window.

## **Contacts**

This section contains a list of regular contacts listed in alphabetical order.



The window is divided into two sections:

- 1- The section on the upper left entitled "Actions" allows you to select the type of people you wish to display in the list.

You can mark or unmark the group or groups of people you wish to display. All groups are displayed by default. By selecting or unselecting one of the groups, they appear automatically linked to the list.

The Filter Selection allows you to make a quick search for contacts and their details.

The available options are:

- a) Do not filter contacts. By selecting this option, the entire list of contacts will be displayed.
- b) Filter by case, which will allow you to search for specific cases and their relevant details.
- c) Filter by tasks shows you a relation between contacts and their tasks.

2- The main "Contacts" window displays a list of contacts and their relevant data according to the filter options selected in the "Actions" menu and contacts are displayed in alphabetical order on the right side of the window. This permits you to select a letter and view all contacts whose names begin with that letter.

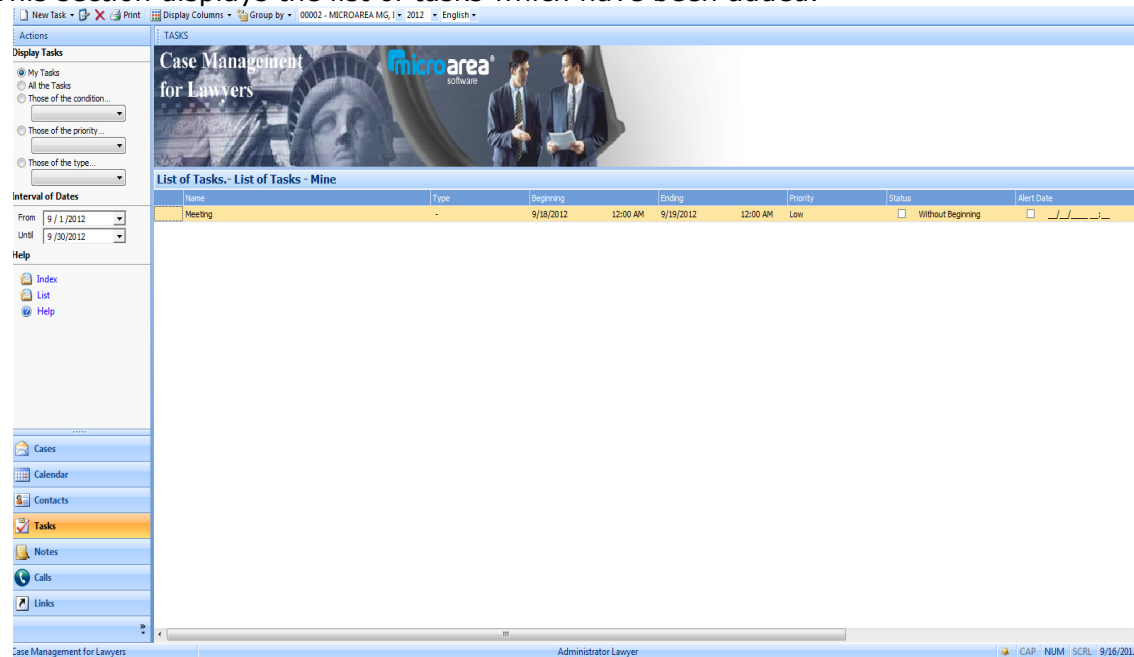
To add new contacts, go to the "File" menu and add the contacts you wish to enter to each group (clients, lawyers, paralegals and personal).

To edit the details of a contact, click twice on the contact with the mouse button and that contact's record will appear for editing.

With this option, it is also possible to enter new contacts within the selected group.

## Tasks

This section displays the list of tasks which have been added.



To add a new task, click on "New" at the top of the window and a new window will appear to add a task. Adding tasks is done in the same way as in the calendar.

In the Actions section you will see the filter selection to display the tasks.

1- My tasks: displays the tasks associated to the active application user.

2- All the tasks: all added tasks appear.

3- Those of the condition: without beginning, started or finalized.

4- Those of the priority: low, normal or high.

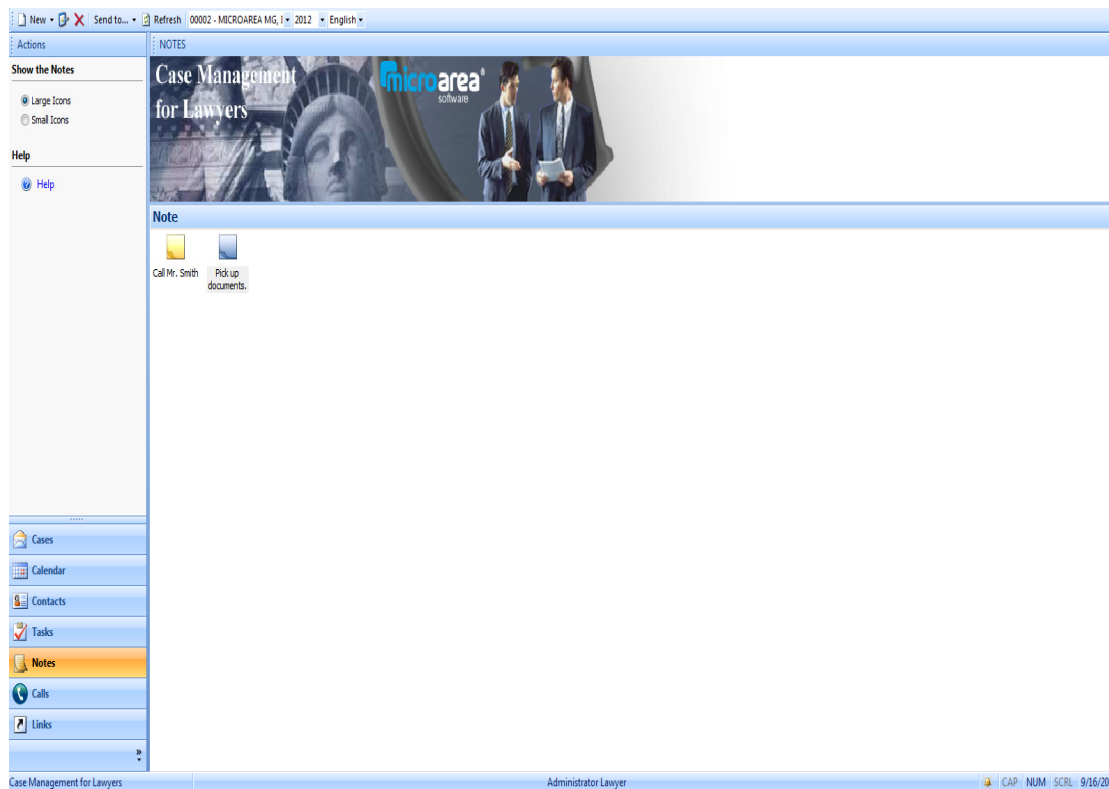
5- Those of the type: according to the criteria you entered from the list of tasks upon creating the new task.



6- Interval of dates: you can choose the starting and ending dates by opening the drop-down menu for searching tasks. This is an additional option like the others. So if you select "Started" as the condition of the task, the list of tasks under this condition will be displayed and ranked by date

## Notes

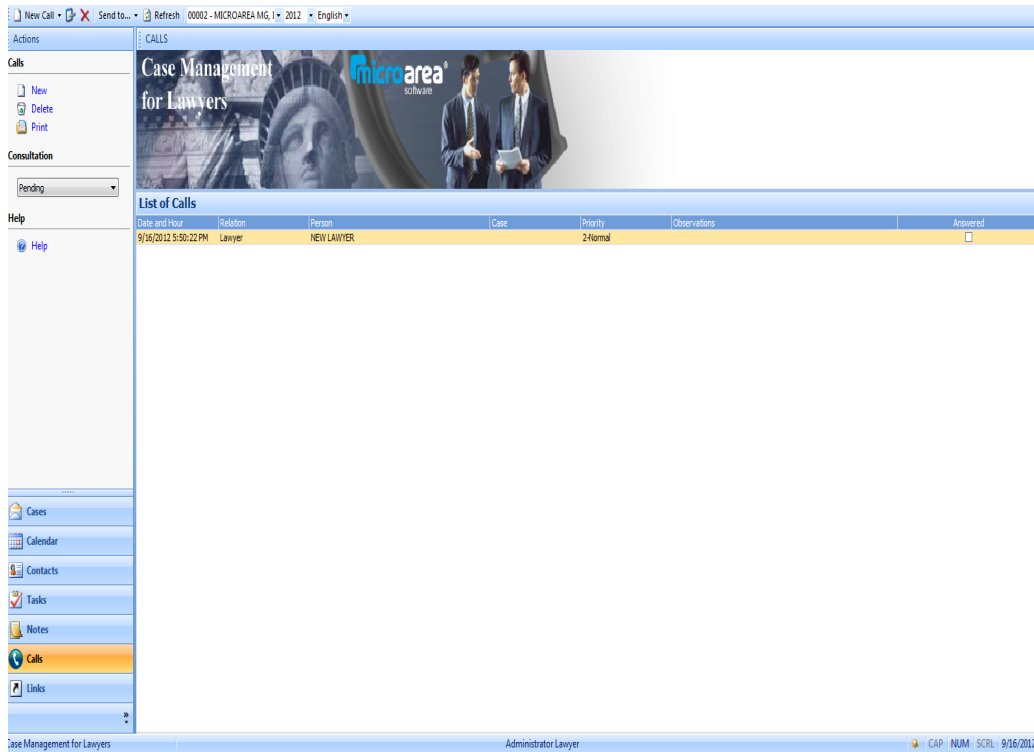
From this window you can create your own notes as well as notes for other users. You can organize the notes by color according to their relevance.



By clicking on the right button of the mouse, you will obtain the options menu with which you can change the colour of the note as well as send it to a colleague of the law firm.

## Calls

From this section you can manage the law firm's outgoing and incoming calls.

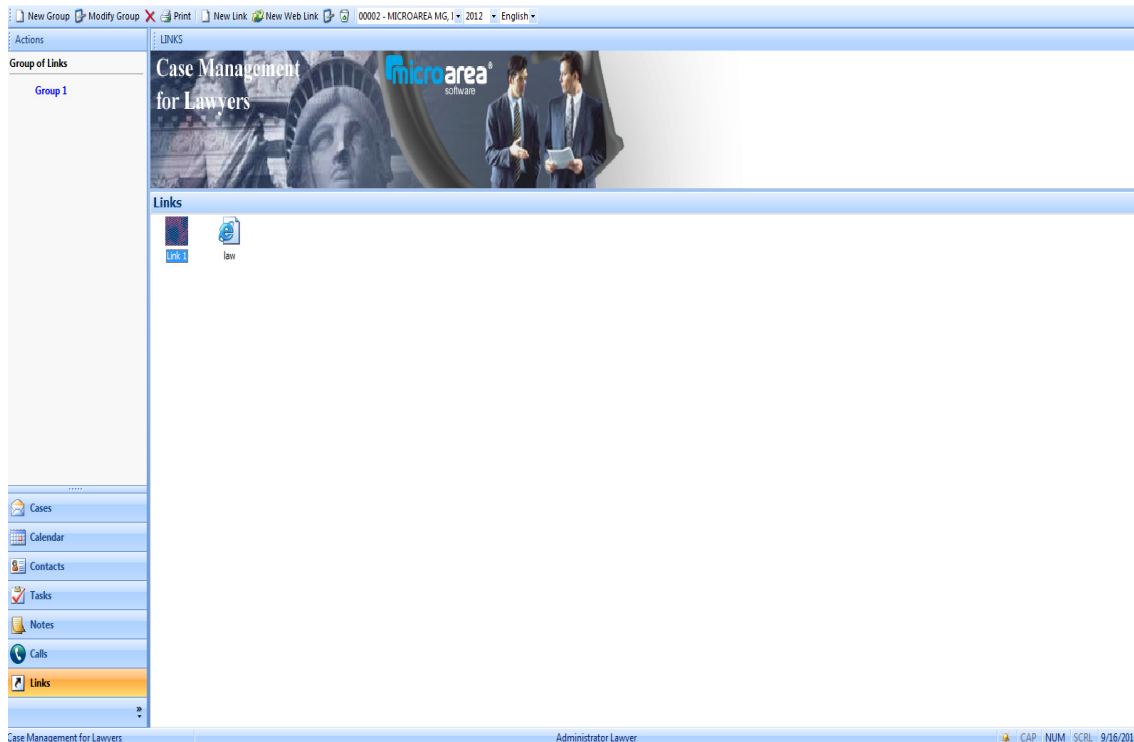


From the actions panel you can make a call, delete an existing call in the log or print a list of the calls. It is also possible to filter the calls log by choosing to display only pending, answered or all calls.

To register a new call, click on New and fill in the details in the new window, select Save and the call will be stored.

## Links

From this section, you can create links to other programs, files, documents on your computer or links to web pages, email etc.



To add a new link, click on the option in the upper bar, entitled “New Group”.

Enter the name you wish to assign to the group of links.

The “New Link” option will create a separate link from the group. To create this link, indicate the name and the location of the link.

An icon will be created on your screen indicating the new link which will also appear in the upper left side of “Actions”.

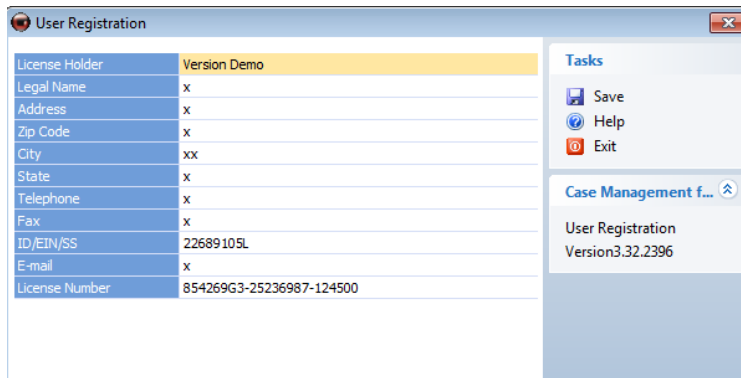
To create web links, click on “Create Web Link” and enter the name and full address of the webpage, for example <http://www.micro-area.com>

You can edit or delete links using the available options.

You can also access the options for creating, opening, modifying or deleting a link by clicking on the right button of the mouse over the background of the window.

**File Menu**

**My Account**



By opening this window, you can consult the program registration data. The registration data must be only entered when the program is accessed and installed for the first time. Upon installation you will be able to configure the FILE MANAGEMENT license holder's details and print the information.

As soon as you receive your license, you will benefit from 30 days of free support. Once this period expires you will be able to subscribe to the opportune maintenance contract. In the package you received, you will find current maintenance contract models.

Subscribing to the maintenance contract will give you right to:

- Receive free updates, improvements of the program and the latest versions under the conditions stated in the mentioned contract.
- Support Line with our technicians department where your queries for handling the program will be dealt with.

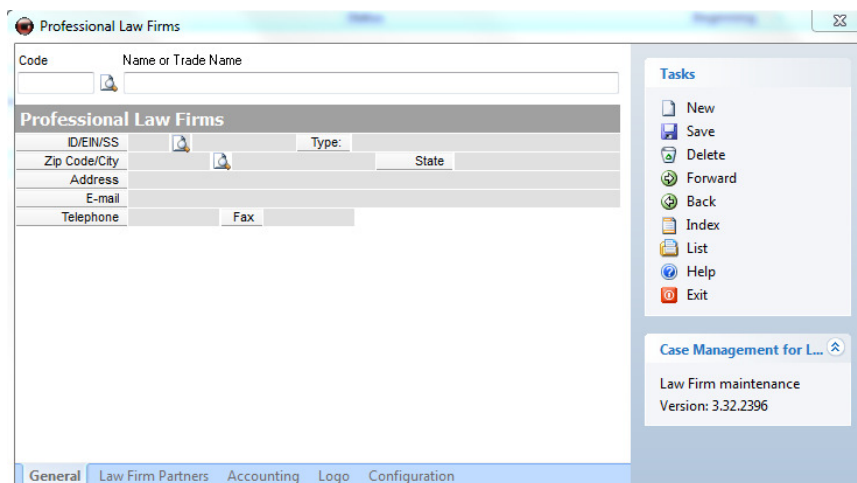
From this menu you can see the application's record data and modify data related to ID, address, city etc. This excludes data related to the program holder and trade name.

**Law Firms**

In the "Law Firms" submenu you can create, delete, modify, view and print data of professional law firms. If you wish to create a new one, click on "Law Firm maintenance" or open the "Firm setup wizard" which will guide you through the process.

**General Tab**

In the first lines of the law firm window, enter general details of the firm.



**Case Code**

Select the number of the law firm.

**Name or Trade Name**

Enter the name or trade name of the form. This is a required field.

**ID**

Enter the Law firm's ID. The number must be an 8-digit number. If this is not the case, add zeros to the left to complete the field.

**Type**

Enter the law firm's type of activity.

**Address, ZIP code, city etc.**

Enter the required details. If you omit a field, that data will not appear in documents or prints.

**Telephone and Fax**

Enter your contact's telephone number.

**E-mail**

Enter the law firm's email address.

**Law Firm Partners Tab**







This window is divided into two sections. In the upper part of the window the members' details are recorded and include the following:

**Identification Details**

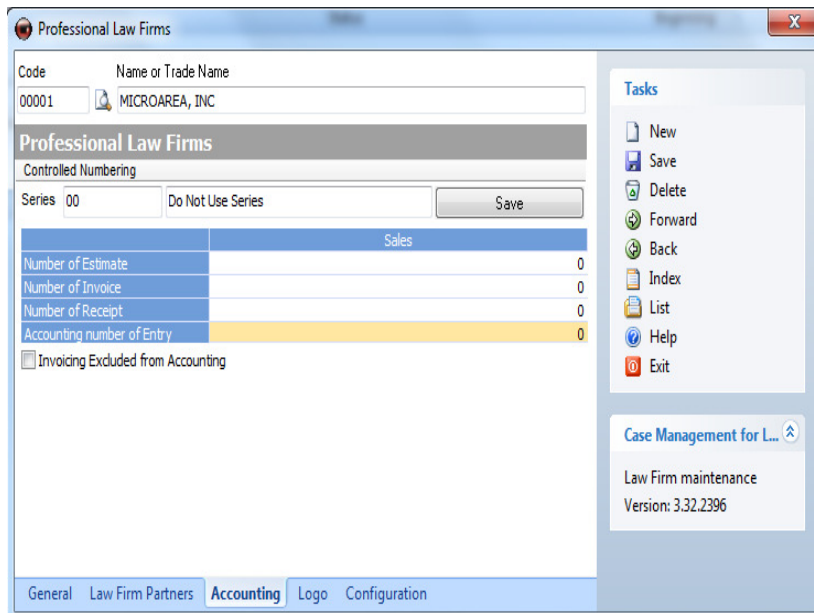
- If the member is a lawyer and their member number and VAT number.
- Code
- Member name
- Address
- ZIP code
- State
- Telephone number
- Bar number
- ID
- % Participation
- Beginning date and ending date of membership.
- % of Participation

The second section of the window displays an index of the law firm's members and when you select on a member's name all that member's details will appear listed in the program.

There are also various options for the maintenance of members:

	The program provides a new code, cleans the window and leaves the cursor in the field for member's name.
	Stores the member in the database.
	Opens the lawyer's window with the member's details.
	Deletes the selected member from the database.
	Direct access to the general members' index.
	Access to the general members list.

**Accounting Tab**



In this section you must record the distinct numeration system that the company will use.

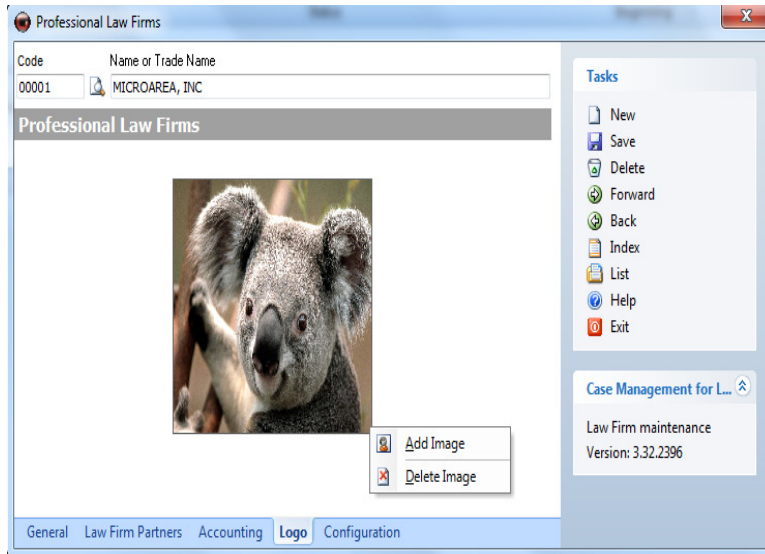
To enter a new series, enter the code and description of the series and click on the "Save" icon.

If you prefer not to use series, you can keep the default option; "Series Unused".

In the lower bar, enter the first code from with which the numeration of documents (budget, invoice, receipt) or sale notes will begin.

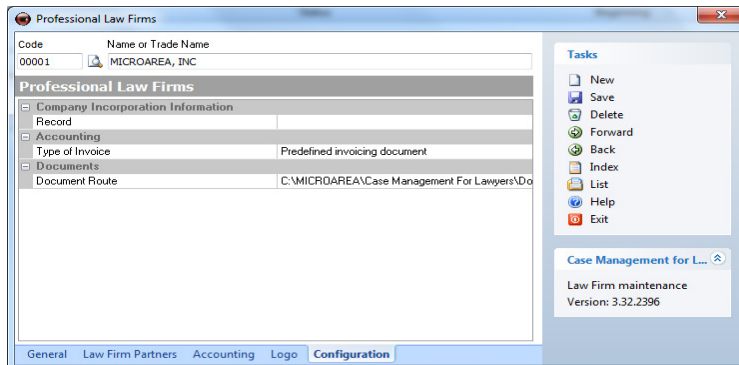
**Logo Tab**

From here you can add a logo to your law firm. To add one, click on the square which



appears in the centre of the window with the right button of the mouse then select "Add Image". Click on Save from the menu on the right. The image of your law firm will appear in the application main window as well as in reports and printed invoices. When you wish to delete the image, select "Delete Image" from the same window.

**Configuration Tab**



In this section you can code the data properties for Company's incorporation and accounting data as well as the document route which is a required

**Company's Incorporation information**

Enter the relevant data of the company's incorporation.

**Accounting**

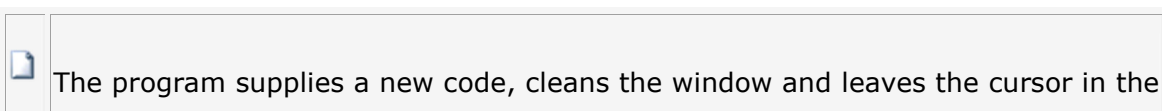
Type of invoice company wants to be issued.










**Documents**

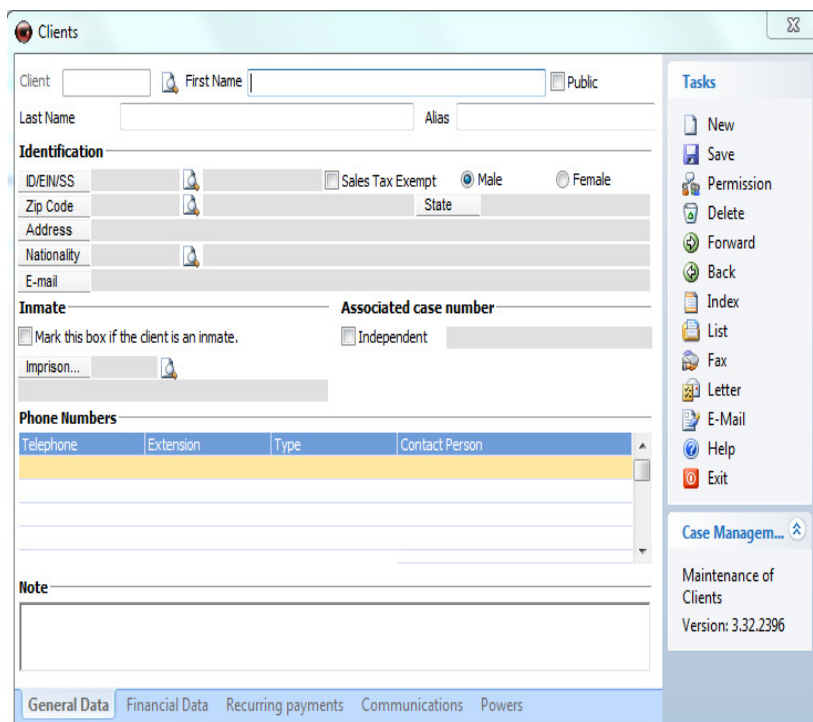
Set up a folder to store the documents created by the program in your law firm. This is a required field.

**Tasks**

In the law firms' menu, you will find a Tasks menu to the right displaying the following options:



	box of the law firm's name. Key combination: ALT+N.
	Stores the law firm in the database. Key combination: ALT+G
	Deletes the selected law firm. Key combination: Alt+B.
	Goes to the next law firm. Key combination: ALT+A.
	Goes to the previous law firm. Key combination: ALT+R.
	Direct access to the general index of law firms. Key combination: ALT+I.
	Access to the general list of law firms. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Closes the applications window. Key combination: ALT+S.



## CLIENTS

In the Clients submenu you can create, delete, modify, view and print clients' data.

### Code

Enter the code to create a new client or to select an existing one. If you click on the magnifying glass, you may choose the existing client from the list.

### Name

Enter the clients' name.



**Last Name**

Enter the clients' last name in this field.

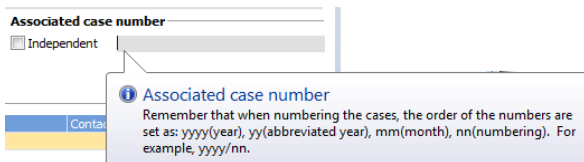
Clients Window Layout: Here you can access the page directly with the sections of each tab of the client file.

General Data	
	Identification
	Accounting
	Telephone numbers and addresses
Financial Data	
	Regular forms of payment
	Other addresses
	Credit cards
	Banks
Recurring payments	
Communications	
Powers	

**General Data Tab**

***Identification***

Here you will find the general data of the client including the address, ZIP code, state, email address, nationality, sex, type of client, if the clients an inmate and if so, in which centre. If the client is public for all colleagues of the law firm, by ticking this option, the client will be visible by all lawyers of the law firm and not just the person who entered the client's details.



Another important option is the numbering of cases for a specific client. You can enter the case number that you wish to use for the client so that when you create a case whose main client is the same client, the

program will use the indicated numbering. To create an independent numbering, write in the relevant text along with the basic data to form the case number which is yyyy for the year in four digits or yy for two digits, mm for the month and nn for the case number.

**Phone numbers**

In this section you can enter telephone contacts, fax, mobile and client details, entering an extension number if necessary and the contact person

**Note.**

In this field you can enter any relevant notes with regards to the client.

**Financial Data Tab**

***Regular Form of payment***

Regular Form of Payment					
Form of Payment	<input type="text"/>	Number of Installments	<input type="text" value="0"/>	Days Between Installments	<input type="text" value="0"/>
Date of 1st payment	<input type="text" value="0"/>	Date of second payment	<input type="text" value="0"/>	Number of days between the invoice date and the first payment.	<input type="text" value="0"/>

**Code and name**

Select the code and name of the form of payment. Note that it must be already coded in the program.

To create or modify form of payment, see the forms of payment section under File menu.

**Number of instalments, number of days between the invoice date and the first payment, date of the first and date of the second.**

In this field, indicate the number of expiry dates, the forms of payment, the number of days between instalments, the number of days between the invoice and the first payment and the client’s first and second day or payment.

**Other Address**

In the following table, you can enter all the client’s dispatching addresses. You can select the addresses when drawing up a budget, order, dispatch note and invoice.

Enter the address, ZIP code, location and the contact person in this table.

***Credit card***

***Here you can enter all necessary details for client’s credit card. It will facilitate future charging.***

***Banks***

Banks						
Bank	Org.	Routing Number	SWIFT	Account	Pred.	
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Use this list to register the client’s banks and their relevant details so that a charge can be made at a later date.

**Note.** This data will need to be already registered before creating the client’s invoice.

**Recurring Payments Tab**

Invoicing of Regular Payments						
Code	Description	Start Date	Due Date Data	End Date	Type	

In this tab, you can enter regular payments to be billed after automatic invoicing.

**Recurring Payments Fields**

**Code**

Enter the code or select one from the magnifying glass.

**Description**

Displays the description of the code when selected

**Start Date.**

Indicate the invoicing start date.

**Due Date Data**

Indicate the data of the invoice’s first due date.

**End Date.**

Enter the end date of the payment.

**Type**

Indicate the type of recurring payment from among the following:

F	Fixed: all payments will be the same amount
R	Requires the user to update the report
V	Variable – the automatic invoice will disappear.
T	Table – You need to update the table units

**Periodic**

Indicate the period of the invoicing in months.

**Units**

Indicate the units to be invoiced.

**Price**

The program will recover the recorded price which is but this can be modified.

**Discount**

Indicate a percentage for the discount of a payment.

**Sales tax**

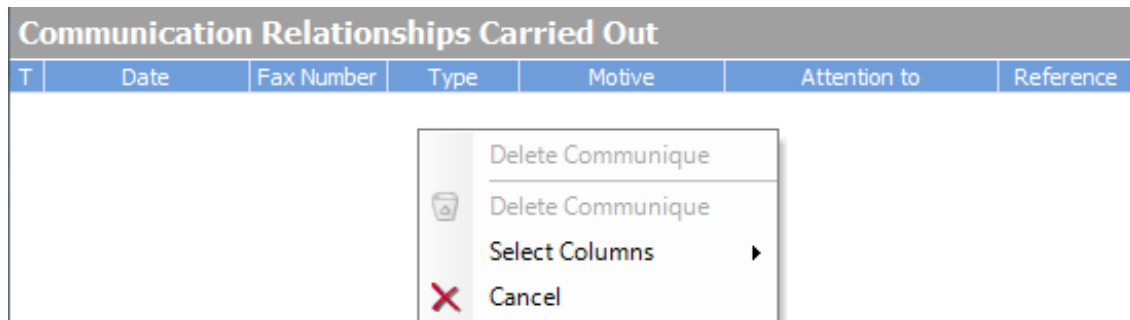
Indicate the type of sales tax.

**Cause of the loss**

Empty field for notes

**Example of Automatic Invoicing**

**Communications Panel**



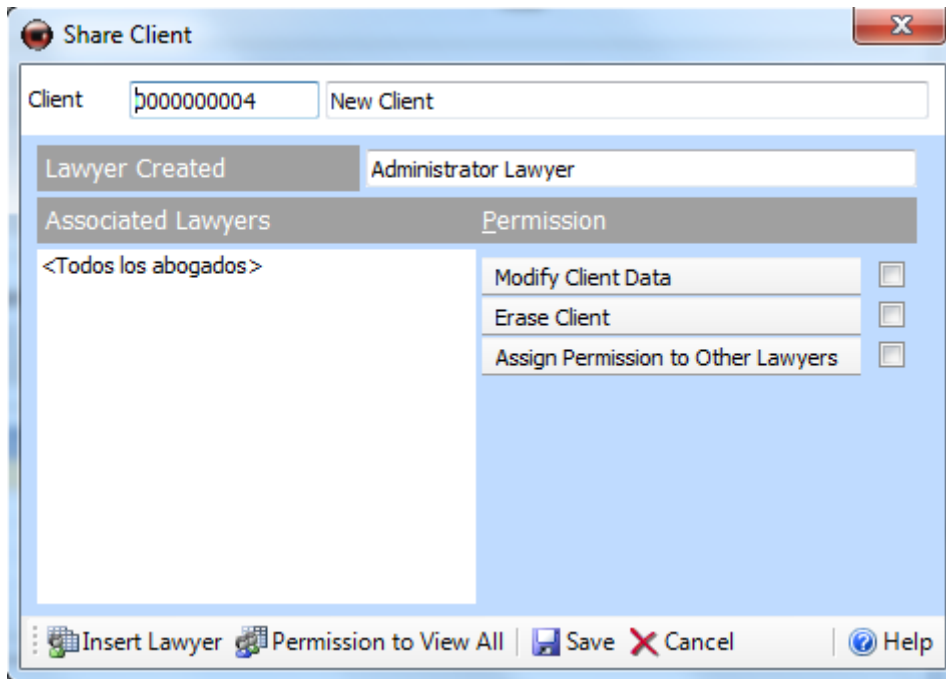
From this option, you can keep a log of communication made using the application of a particular client. You will see a list of calls, mails, faxes and any other type of contact made with the client

**Powers**

**In this tab you can enter the details for empowered representative and also select the document you empowered him for.**

**PERMISSIONS**

On right hand side in the Clients window you can find PERMISSION button. Clicking the permission icon allows you to manage permissions related to that specific client. We can also assign permission to the different users within the program.



By selecting the icons found at the bottom of the window we can:



**Insert lawyer:** We can select from lawyers who share the client.











**Permission to view all:** When selected, this option will give all lawyers permission to view the client, as well to modify client data, delete the client or assign permission to another lawyer.

**Save:** Record the data introduced in this window.

**Cancel:** Close the window without saving data.

**TASKS**

	<p>The program provides a new code, cleans the window and leaves the cursor in the client's record card. Key combination: ALT+N.</p>
	<p>Stores the client in the database. Key combination: ALT+G.</p>

	Deletes the selected client. Key combination: ALT+B.
	Goes to the next client. Key combination: ALT+A.
	Goes to the previous client. Key combination: ALT+R.
	Access to the general index of clients. Key combination: ALT+I.
	Access to the general list of clients. Key combination: ALT+L.
	Fax, displays the fax-sending window for the current client.
	Letter. Allows you to send letters to clients.
	Email, sends an email to the client without having to leave the application. In order to send emails, the program must be configured with Microsoft Outlook.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Paralegals

In this section you can enter the data of suppliers and paralegals.

### Code

Enter the code to create a new paralegal or to select an existing one. If you click on the magnifying glass, you can select an existing supplier.

### Name

Enter the name of the supplier-paralegal.

Paralegal window outline; here you have direct access to this page containing all tabs and sections of the paralegal's record card.

General Data	
	ID
	Contact
	Type
	<b>Financier</b>
Accounting	

**General Data Tab**

***Identification***

**Identification**

ID/EIN/SS		Paralegal Number	
Zip Code		State	
Address			
Country			

Here you will find the paralegal’s general data such as the paralegal’s address, ZIP code, state and country.

**Contact**

**Contact**

Commercial Name			
Contact Person			
Telephone		Mobile	
Fax		Fax 2	
E-mail			
Web			

In this contacts section, enter the trade name of the supplier-paralegal and the contact person.

You can also register the paralegal’s telephone & fax numbers, email, web pages and the paralegal’s vacation period or any other relevant information.

**Type**

**Type** \_\_\_\_\_ Select the relevant option: supplier or collaborator

Supplier  
 Collaborator

Vacations

of  to

***FINANCIER***

**Financier**

Sales Tax	
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


**Sales Tax**

Select the paralegal's tax system..

### **Communications Tab**

This option allows you to keep a log of communication made via the program with the relevant paralegal. You can see a list of calls, mails, faxes and any other types of contact made with the paralegal.

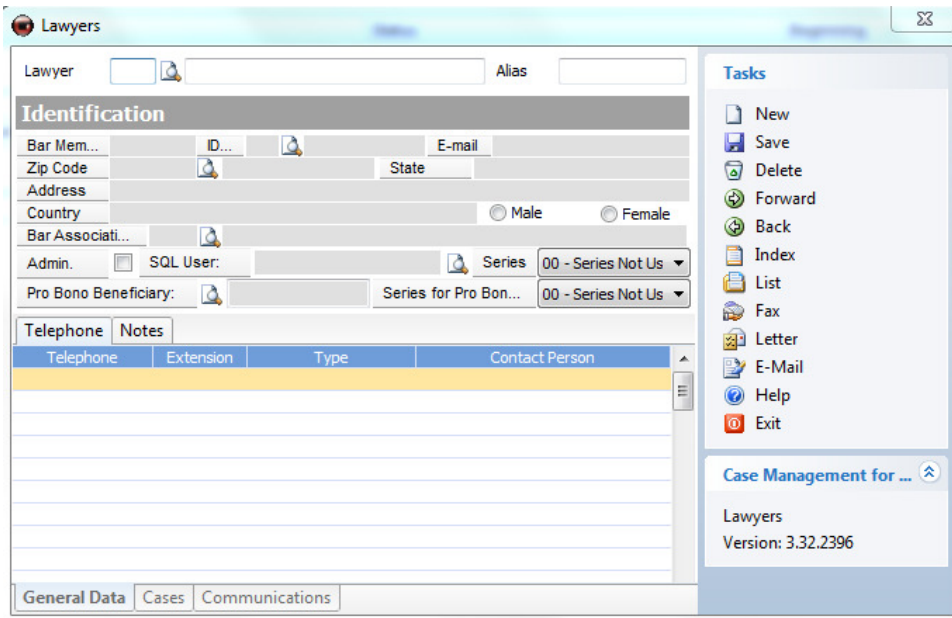
### **TASKS**

	The program provides a new code, cleans the window and leaves the cursor in the paralegal's record card. Key combination: ALT+N.
	Stores the paralegal in the database. Key combination: ALT+G.
	Deletes the selected paralegal. Key combination: ALT+B.
	Goes to the next paralegal. Key combination: ALT+A.
	Goes to the previous paralegal. Key combination: ALT+R.
	Access to the general index of paralegals- Key combination ALT+I.
	Access to the general list of paralegals. Key combination ALT+L.
	Fax. Allows you to create and print a fax to send to the paralegal.
	Letter. From here you can draw up a letter to send to the paralegal.
	Email. Allows you to send an email directly to the paralegal.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.



## Lawyers

This section allows you to register lawyers and their details.



### Code

Enter the code to create a new lawyer or to select an existing one. If you click on the magnifying glass, you can select an existing lawyer from the list.

### Name

Enter the lawyer's name.

Lawyer's window outline: Here you have direct access to this page containing all tabs and sections of the lawyer's record card.

General Data	
	Identification
	Notes
	Telephone numbers
Cases	
Communications	

**General Data Tab.**

***Identification***

Identification			
Bar Mem...	ID...	E-mail	
Zip Code	State		
Address			
Country	<input type="radio"/> Male <input type="radio"/> Female		
Bar Associati...			
Admin. <input type="checkbox"/>	SQL User:	Series	00 - Series Not Us ▼
Pro Bono Beneficiary:	Series for Pro Bon...	00 - Series Not Us ▼	

Here you will find general data regarding the lawyer such as registration number, email address, address and ZIP code, sex, state, bar association and country of residence. This section also informs you if the user is an administrator and whether assigned as a SQL user in order to have access to the application.

You can also select a series for invoicing made by that lawyer both for the lawyer’s own cases and invoices from legal aid.

***Notes***

Here you can enter information regarding the lawyer.

**Telephone numbers**

Telephone	Notes		
Telephone	Extension	Type	Contact Person
212 888 777		01 Telephone	John Smith
212 333 555		03 Fax	

Use this table to enter telephone contact numbers of the lawyer and the contact person.













**Cases Tab.**

This window displays the cases which the lawyer is involved in and which are recorded in the main cases window

**Communications Tab**

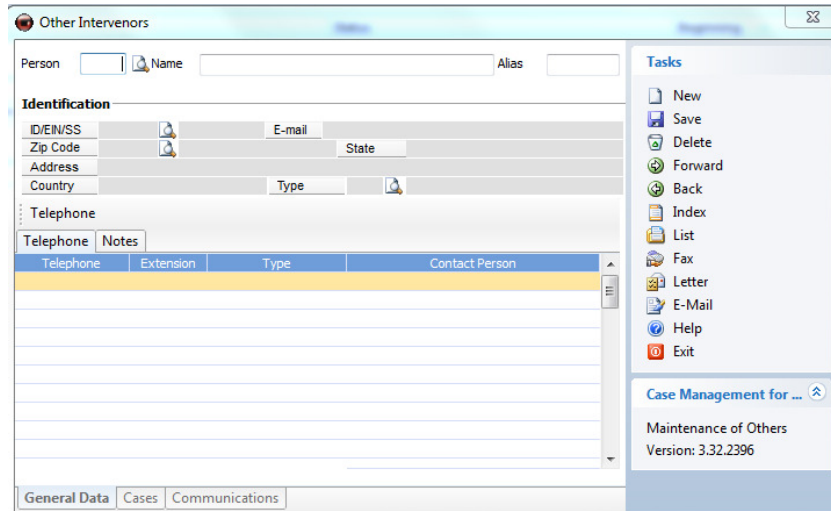
On this tab you can keep a log of communication made using the application with this lawyer. You will see a list of calls, mails, faxes and other types of communication made with the lawyer.

**TASKS**

	The program supplies a new code, cleans the window and leaves the cursor in the box of the lawyer's details. Key combination: ALT+N
	Stores the lawyer in the database. Key combination: ALT+G.
	Deletes the selected lawyer. Key combination: ALT+B.
	Goes to the next lawyer. Key combination: ALT+A.
	Goes to the previous lawyer. Key combination ALT+R.
	Access to the general index of lawyers. Key combination: ALT+I.
	Access to the general list of lawyers. Key combination: ALT+L.
	Fax. Allows you to create and print a fax to send to the lawyer.
	Letter. From here you can create and print a letter to send the lawyer.
	Email. Allows you to send an email to the lawyer.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Other Intervenors

This section allows you to record other intervenors involved in the case.



### Code

Enter the code to create a new person or to select an existing person. If you click on the magnifying glass, you can select a person already registered in the database.

### Name

Enter the person's name.

Other intervenors window outline: for direct access to this page containing all sections and tabs of the other intervenor record card.

General data	
	Identification
	Notes
	Telephone numbers
Cases	
Communication	

### General Data Tab

#### **Identification**

<b>Identification</b>	
ID/EIN/SS	E-mail
Zip Code	State
Address	
Country	Type

Here you will find the person's general data such as the address, ZIP code, state, email address, country of residence, type of the intervenor and telephone contacts.

### **Notes**

Here you can enter information about the person.

### **Telephone numbers**

Telephone		Notes	
Telephone	Extension	Type	Contact Person
212 777 444		01 Telephone	Jason Jackson

In this table you can enter intervenor's telephone numbers and contact person.







### **Cases Tab**







This window displays the cases in which the person is involved and which are registered in the main cases window.

### **Communications Tab**

From this option you can keep a log of communication made using the application with this person. You will see a list of calls, mails, faxes and other types of contact made with this person.

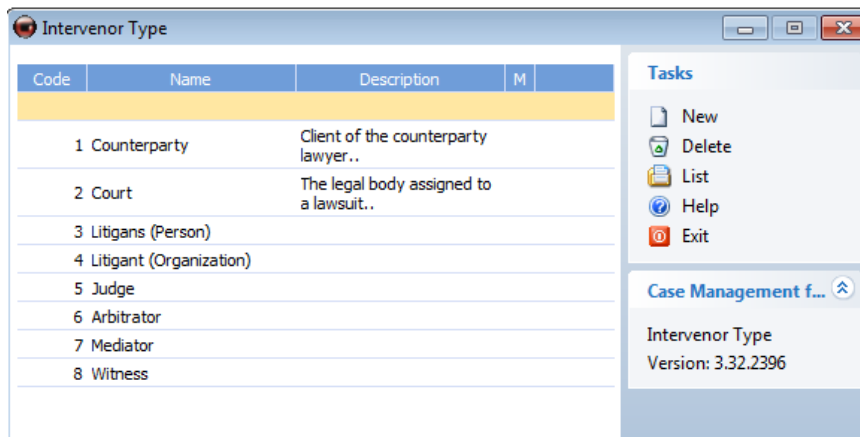
### **TASKS**

	The program supplies a new code, cleans the window and leaves the cursor in the person's record card. Key combination: ALT+N.
	Stores the person in the database. Key combination: ALT+G.
	Deletes the selected person. Key combination: ALT+B.
	Goes to the next person. Key combination: ALT+A.
	Goes to the previous person. Key combination: ALT+R.
	Access to the general index of people. Key combination: ALT+I.

	Access to the general list of people. Key combination: ALT+L.
	Fax. Allows you to create and print a fax to send to the relevant person.
	Letter. From here you can create and print a letter to send to the relevant person.
	Email. Allows you to send an email to the relevant person.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination ALT+S.

## Intervenor type

This section allows you to register types of intervenors.



The window is divided into three fields:

### Code

Enter the code for the intervenor.


### Name

Enter the name with which you wish to register the intervenor.






**Description**

Enter a brief description of the intervenor.

**Save.**

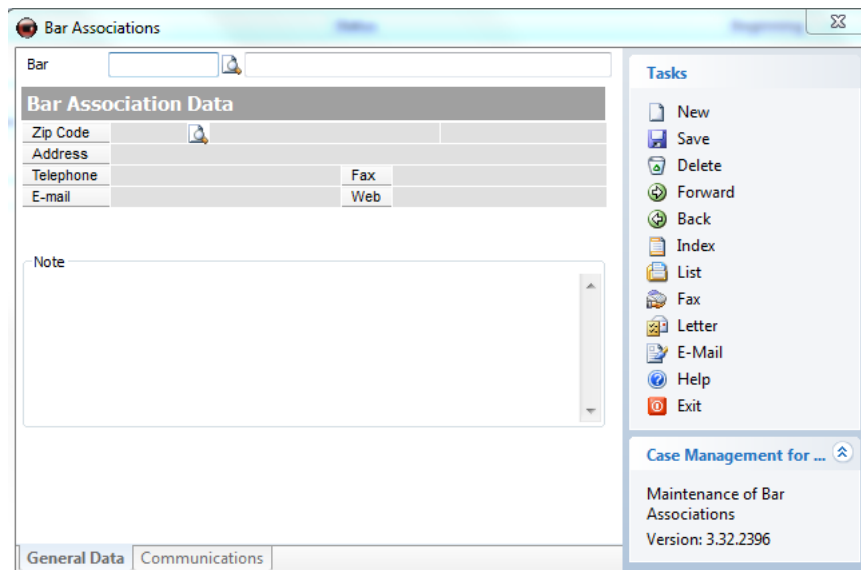
Press on the  save icon to save the relationship.

**TASKS**

	The program supplies a new code and leaves the cursor in the record card. Key combination: ALT+N.
	Deletes the selected relationship. Key combination ALT+B.
	Access to the general index of relationships. Key combination: ALT+L.
	Open the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

**Bar Associations**

This window allows you to register data of bar associations.



**General Data Tab****Code**

Enter the code to create a new bar association or to select an existing one. If you click on the magnifying glass, you can select a bar association which has already been recorded in the list.

**Name**

Enter the name of the bar association.

**Identification**

In the identification fields, enter the address, ZIP code and city.







You can also enter the telephone and fax numbers of the bar association.

In the notes section you can enter any type of comment regarding this bar association.







**Communications Tab**

From this option you can keep a log of communication made using the application with the relevant bar association. You will see a list of calls, mails, faxes and other types of contact made with the bar association

**TASKS**

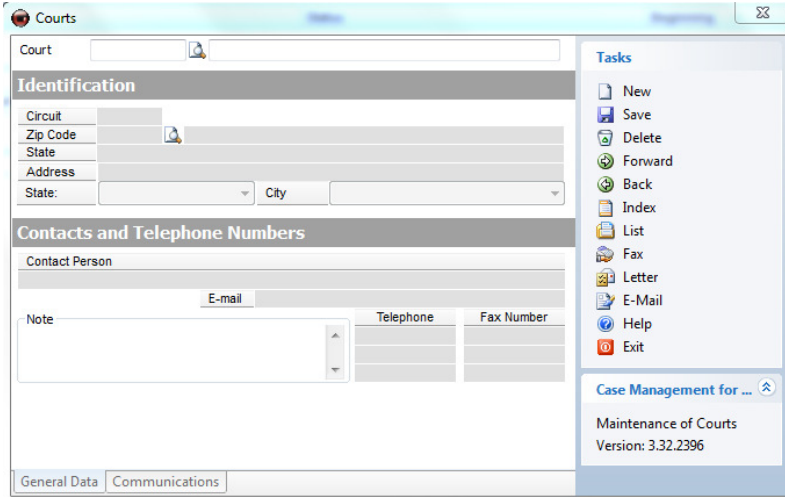
	The program supplies a new code, cleans the window and leaves the cursor in the bar association record card. Key combination: ALT+N.
	Stores the bar association in the database. Key combination: ALT+G.
	Deletes the selected bar association. Key combination: ALT+B.
	Goes to the next bar association. Key combination: ALT+A.
	Goes to the previous bar association. Key combination: ALT+R.
	Access to the general index of bar associations. Key combination: ALT+I.



	Access to the general list of bar associations. Key combination: ALT+L.
	Fax. Allows you to create and print a fax to send to a contact.
	Letter. From here you can create and print a letter to send to a contact.
	Email. Allows you to send an email to a contact.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination ALT+S.

## Courts

This window allows you to register details of courts.



The screenshot shows the 'Courts' application window. It features a search bar at the top for finding existing courts. Below this, there are two main sections: 'Identification' and 'Contacts and Telephone Numbers'. The 'Identification' section includes fields for Circuit, Zip Code, State, Address, and City. The 'Contacts and Telephone Numbers' section includes a field for Contact Person, a table for E-mail, Telephone, and Fax Number, and a Note field. On the right side, there is a 'Tasks' menu with options like New, Save, Delete, Forward, Back, Index, List, Fax, Letter, E-Mail, Help, and Exit. At the bottom right, it displays 'Case Management for ...' and 'Maintenance of Courts Version: 3.32.2396'. The bottom of the window has tabs for 'General Data' and 'Communications'.

### General Data Tab

#### Code

Enter the code to create a new court or to select an existing one. If you click on the magnifying glass you can select a court which has already been registered in the database.

**Name**

Enter the name of the court.

**Identification**

In the identification fields, enter the following data:

- Circuit.
- Address, ZIP code and city.

**Telephone numbers and contacts**








In this section, enter the following details:






- Contact person of the court.
- E-mail
- Telephone and fax numbers.
- Notes about the court.

**Communications Tab**

From this option you can keep a log of communications made using the application with the relevant court. You will see a list of calls, mails, faxes and other types of contact made with the court.

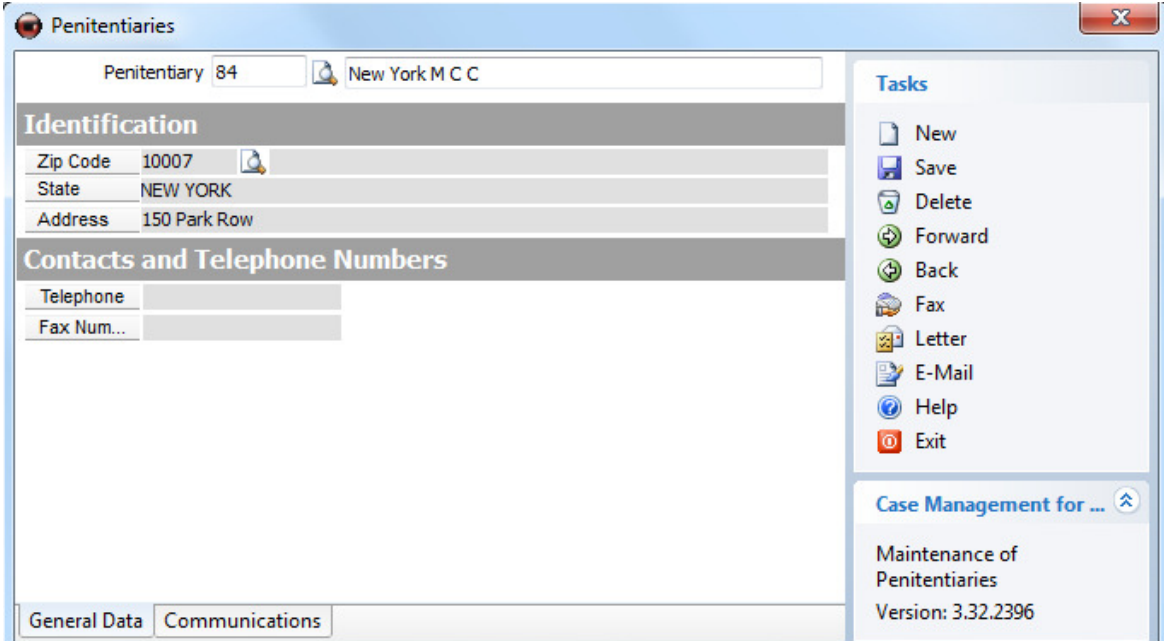
**TASKS**

	The program supplies a new code cleans the window and leaves the cursor in the court's record card. Key combination: ALT+N.
	Stores the court in the database. Key combination: ALT+G.
	Deletes the selected court. Key combination ALT+B.
	Goes to the next court. Key combination: ALT+A.
	Goes to the previous court. Key combination: ALT+R.
	Access to the general index of courts. Key combination: ALT+I.
	Access to the general list of courts. Key combination: ALT+L.

	Fax. Allows you to print and send a fax to a court.
	Letter. From here you can create and print a letter to send to a court.
	Email. Allows you to send an email to a court.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Penitentiaries

This window allows you to register details of penitentiaries.



### General Data Tab

#### Code

Enter the code to create a new penitentiary or to select an existing one. If you click on the magnifying glass you can select a penitentiary which has already been registered in the database.

**Name**

Enter the name of the penitentiary.

**Identification**

In the identification fields, enter ZIP code, state and address.










**Telephone numbers and contacts**




In this section enter phone and fax number of the penitentiary.

**Communications Tab**

On this tab you can keep a log of communications made using the application with the relevant penitentiary. You will see a list of calls, mails, faxes and other types of contact made with the penitentiary.

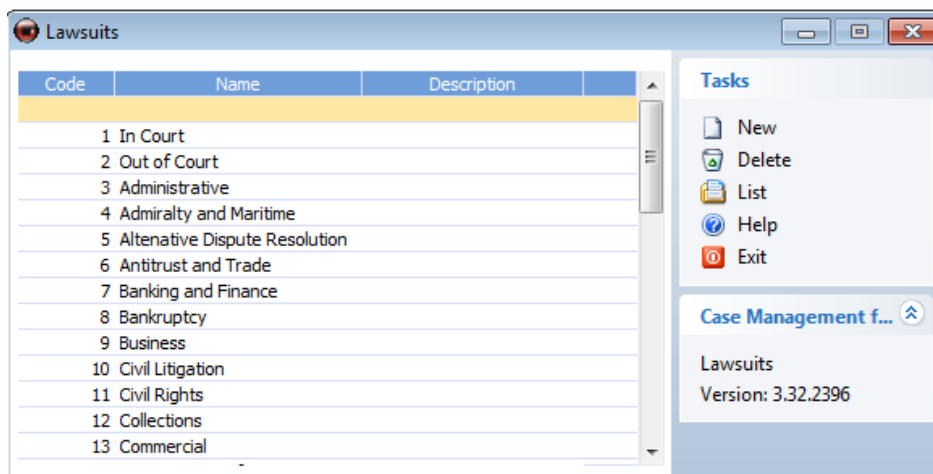
**TASKS**

	The program supplies a new code cleans the window and leaves the cursor in the court's record card. Key combination: ALT+N.
	Stores the court in the database. Key combination: ALT+G.
	Deletes the selected court. Key combination ALT+B.
	Goes to the next court. Key combination: ALT+A.
	Goes to the previous court. Key combination: ALT+R.
	Access to the general index of courts. Key combination: ALT+I.
	Access to the general list of courts. Key combination: ALT+L.
	Fax. Allows you to print and send a fax to a penitentiary.
	Letter. From here you can create and print a letter to send to a penitentiary.

	Email. Allows you to send an email to a penitentiary.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Types of Lawsuits

In the types of lawsuits submenu, you can create, delete and modify the distinct procedures which must be carried out when starting on a case.



The window is divided into various fields.

### Code

Enter the code assigned to the lawsuit.

### Name

Enter the name of the lawsuit.






### Description

Enter a brief description regarding the lawsuit.

### Save.

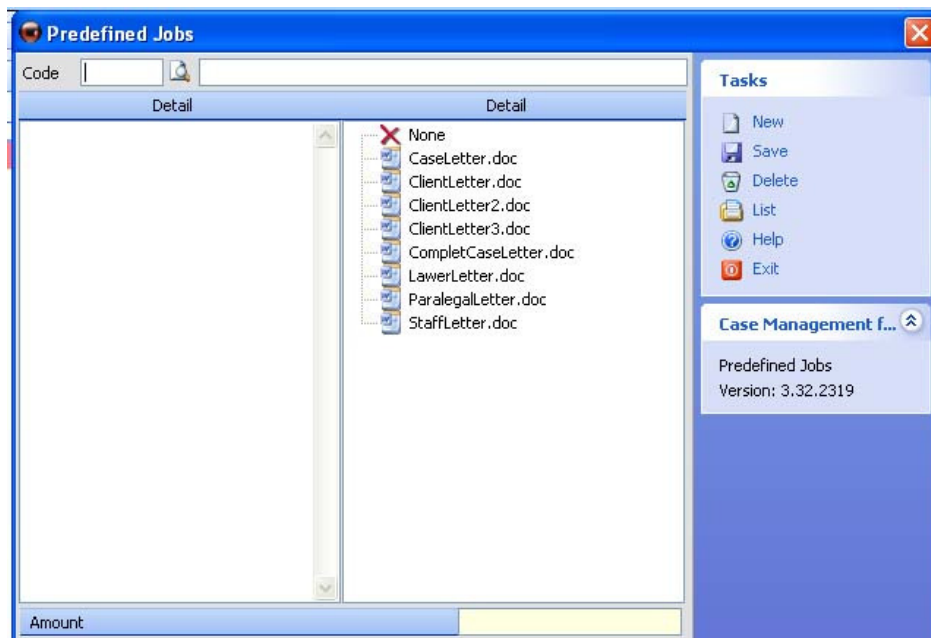
By clicking on the save  icon, the lawsuit will be saved.

**TASKS**






	The program supplies a new code and leaves the cursor in the lawsuit's record card. Key combination: ALT+N.
	Deletes the selected lawsuit. Key combination: ALT+B.
	Access to the general list of lawsuits. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

**Predefined Jobs**

Use this option to create predefined jobs including a description and details of staff and pre-established costs which may later be incorporated to any case by using the relevant option within a particular case.

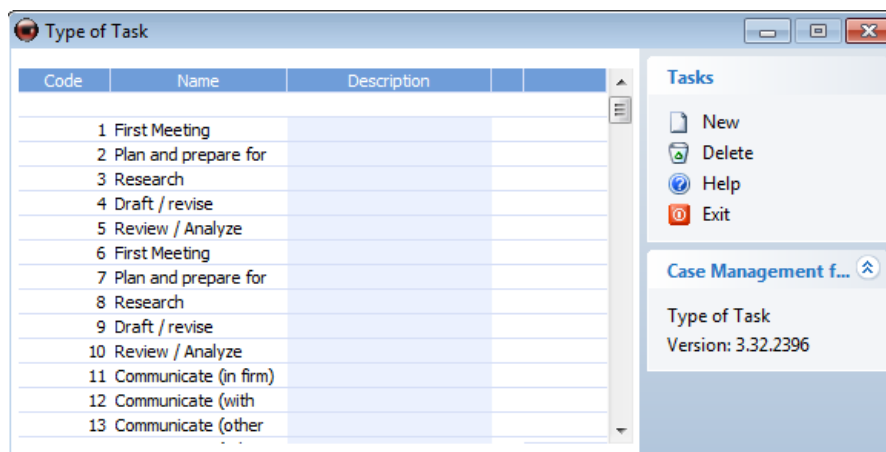


**TASKS**

	The program provides a new code and leaves the cursor in the predefined jobs record card. Key combination: ALT+N.
	Deletes the selected predefined job. Key combination: ALT+B.
	Access to the list of predefined jobs. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

**Types of Tasks**

Use the types of tasks submenu to create, delete and modify different types of tasks.



The window is divided into various fields:

**Code**

Enter the code which has been assigned to the task.


**Name**

Enter the name of the task.





**Description**

Choose a task colour to be displayed on the calendar.

**Save.**

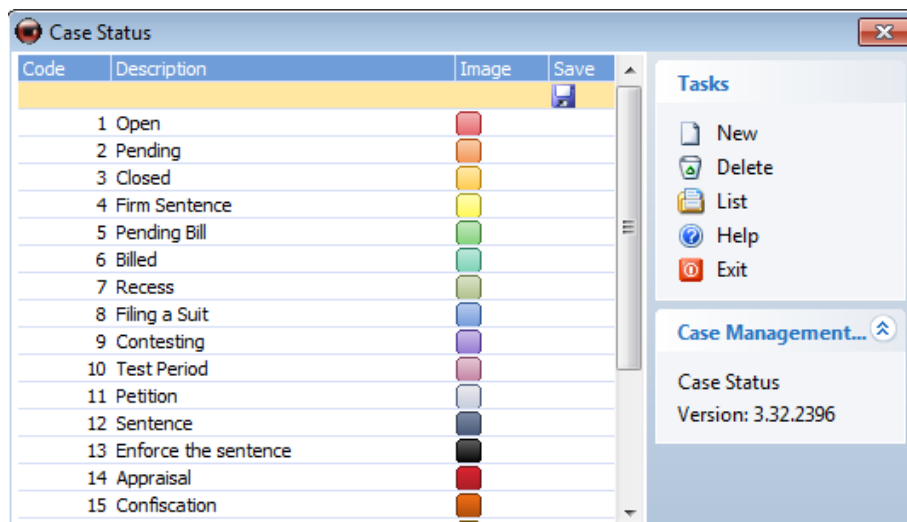
By clicking on the save  icon, you can save the type of task.

**TASKS**

	Empties the spaces to register a new task. This command can also be made with the keys: ALT+N.
	Deletes the selected task. Key combination ALT+B.
	Opens the help window. Key combination: ALT+Y
	Closes the window without applying the changes. Key combination: ALT+S

**Status**

Use this section to register the status of the cases.



The window is divided into various fields.



**Code**

Enter the code assigned to the status.

**Description**

Enter a description of the status






**Image**

Select an icon which will be assigned to the status of cases

**Save.**

By clicking on the save  icon, the status will be saved.

**TASKS**

	The program supplies a new code and leaves the cursor in the procedures record card. Key combination: ALT+N.
	Deletes the selected procedure. Key combination: ALT+B.
	Access to the list of statuses. Key combination: ALT+L.
	Open the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Predefined services

Use this option to enter details of payments to be invoiced.

### Code

Enter the code to create a new invoicing payment or select an existing one. If you click on the magnifying glass with the mouse, you can select a payment which has already been recorded.

### Description

Enter the name of the invoicing payment.

### **Price Rates and Fee Rates**

This section contains six boxes which may hold up to six distinct rates and includes a space to enter the "Base Price" of the predefined service.

### **FINANCIER**

### Sales Tax

Select corresponding type of sales tax.

### **Characteristics**










Here you can mark the payment to state whether it is a service or an obsolete payment (If obsolete is marked, it will not appear in the popup menu containing predefined services).

## Periodic Invoicing

If the payment does not need to be invoiced periodically, leave the space blank. Otherwise, check the box and choose the type of invoicing: Fixed, Variable, Requires updates and Table.

Finally, select how many months the payment must be invoiced from the drop-down menu and from which month it is to be invoiced.

## TASKS

	The program supplies a new code, cleans the window and leaves the cursor in the predefined services record card. Key combination: ALT+N
	Stores the predefined service in the database. Key combination: ALT+G.
	Deletes the selected predefined service. Key combination: ALT+B.
	Goes to the next predefined service. Key combination: ALT+A.
	Goes to the previous predefined service. Key combination: ALT+R.
	Duplicates the predefined service and all its characteristics and lets you assign new code to the predefined service.
	Access to the general list of paralegals. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## FORMS OF PAYMENT

In the Forms of Payment submenu, you can create, delete, modify, view and print the forms of payment data of a particular case.

Options	
Add to Collections	N
Prepaid Option	Y
Print Receipt	N
POS	Y
Credit Card Charge	Y
Wire Transfer	N

Payments	
Print Checks	N

Due Dates	
Number of Installments	0
Days Between Payments	0
Days between the bill date and the 1st Payment	0
Day of the First Payment	0
Day of the Second Payment	0

Accounting Portfolio	
Portfolio Code	0005

## Code

Enter the code to create a new form of payment or to select an existing one. If you click on the magnifying glass with the mouse, you can select an existing one from the list.

## Description

Enter the name of the form of payment.

## Include in the remittance.

This option allows you to create receipts/due dates of invoices recorded in the database with this form of payment.

## Prepaid option

This option will create an entry according to accounting rules with the payment/charge of the invoice.

## Print receipt.

If you mark this option, whenever receipts are created, the program will print the first receipt/due date upon printing the invoice.

## Credit card charge

Use this option to identify a payment made by card and for subsequent commissions to be charged by the bank.

## TPV

This option indicates that the form of payment will be available at the Magest4 point of sales terminal.

**Wire Transfer**

Through this option you can indicate that the form of payment is a transfer so that the transfer is reflected in the document.

Print checks

If checks are involved with specific form of payment here you can indicate if you want checks to be printed.

**Instalment Numbers**

Enter the number of instalments.

**Days between Payments**

Indicate the number of days between one payment and the next.

**Days from the Invoice Day to the First Payment**

Enter the number of days which must pass to make the first payment since the date that the invoice was created.

**Day of the First Payment**

Enter the first payment day.




**Day of the Second Payment**






Enter the second payment day.

**Accounting Portfolio**

Enter the code to select a portfolio if it already exists. If you click on the magnifying glass, you can select an existing portfolio from the list. This option must also be checked for the program to produce receipts

**TASKS**

	The program supplies a new code, empties the window and leaves the cursor in the forms of payment record card. Key combination: ALT+N.
	Stores the form of payment and charge in the database. Key combination: ALT+G.
	Deletes the select form of payment and charge. Key combination: ALT+B.

	Goes to the next form of payment and charge. Key combination: ALT+A.
	Goes to the previous form of payment and charge. Key combination: ALT+R.
	Access to the general list of forms of payment and charges. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Opens the application window. Key combination: ALT+S.

## PORTFOLIO MAINTENANCE

In the "Portfolio Maintenance" submenu you can create, delete, modify, view and print data from the portfolios of a case.



### Code

Enter the code to create a new portfolio or to select an existing one.

### Description

Enter the name of the portfolio.






**Notes**

In this section you can enter notes to be considered with the clients. This field does not affect the calculation of any of the application's payments.

**Collections and Payments**

Select the letter "C" for collection or "P" for payment from the drop-down menu.

**TASKS**

	The program supplies a new code and leaves the cursor in the box containing the relevant name. Key combination: ALT+N.
	Deletes the selected portfolio. key combination: ALT+B.
	Access to the general index of portfolios. Key combination: ALT+L.
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## Banks

In the Banks submenu you can create, delete, modify, view and print data regarding banks.

The program creates a bank by default using the code 9999 and named Bank.

### Code

Enter the code to create a bank or to select an existing one. If you click on the magnifying glass, you can select an existing one from the list.

### Name

Enter the name of the bank.

### General

#### Address

Enter the address of the bank.

#### ZIP Code

Select the ZIP Code by clicking on the magnifying glass and using the drop-down menu. The town will appear automatically (This data is recorded in the ZIP codes' register).

#### Telephone

Enter the bank's telephone number.



**Fax**

Enter the bank's fax number.

**ID**

Enter the bank's ID.

**Proxy**









Enter the proxy name of the bank.

**Director**

Enter the name of the bank's director.

**Risk**

Here we can enter amount of credit awarded by specific bank and also amount of credit consumed.

	Cleans the screen and assigns to the next number to enter a new bank. You can also perform this action with the key combination ALT+N.
	Saves the bank in the database. Key combination: ALT+G
	Deletes the bank from the database. Key combination: ALT+B
	Goes to the next bank. Key combination: ALT+A
	Goes back to the previous bank. Key combination: ALT+R
	Access to the list of banks. Key combination: ALT+L
	Displays the help window. Key combination: ALT+Y
	Closes the window without saving the changes. Key combination: ALT+S

## TYPE OF SALES TAX

In this submenu you can register different types of sales tax to be applied. The program allows you to register up to ten types of sales taxes. Later when creating an invoice, it will be possible to use these types of sales taxes. The program includes VAT tax by default.







### DATA

To define a new type of sales tax, you must provide the program with the following information.

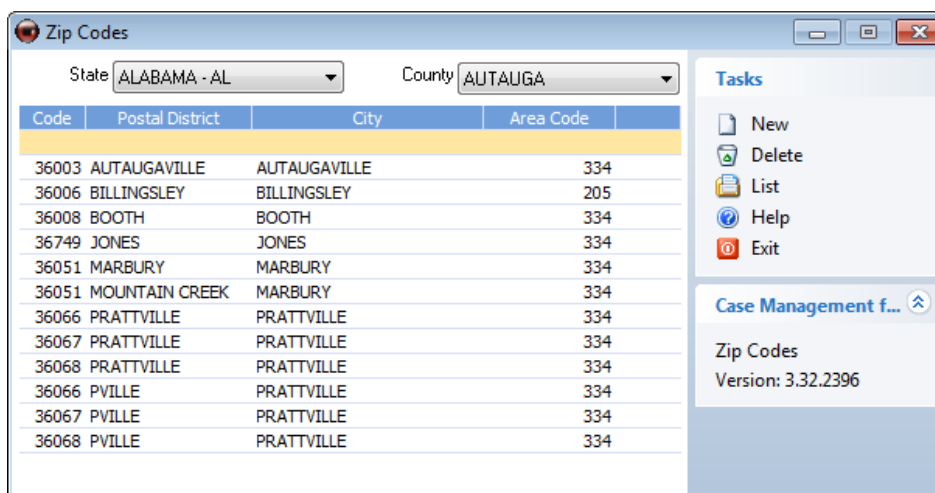
- **Description:** Brief description of Sales tax
- **Percentage of VAT:** Percentage of this type of sales tax to be applied.

### TASKS

	Stores the sales tax in the database. Key combination: ALT+G.
	Displays list of sales taxes. Key combination: ALT+L
	Opens the help window. Key combination: ALT+Y.
	Closes the application window. Key combination: ALT+S.

## ZIP CODES

In this submenu, you can consult, insert and delete ZIP codes of U.S. locations. The program already incorporates all existing codes at the time of the software's creation. To find a code, write the number in the first row. If this code already exists, the program will provide the relevant code to the second row. If, on the other hand, the code does not exist, the program places the cursor in the second column. To record a new ZIP code, simply fill in the details and click on the disk icon situated in the first row.








## DATA

The data displayed on the screen includes:

- **Code:** Number to identify the location.
- **Postal district:** Displays district associated with area code within specific city/state.
- **City:** Town or city associated with the ZIP code.
- **Area code: Displays area code numbers for selected ZIP code.**

## TASKS

	Places the cursor in the first row to enter a new Zip code. Key combination: ALT+N.
	Deletes the current Zip code. Key combination: ALT+B.
	List of all stored Zip codes. Key combination: ALT+L.

	Displays the help panel. Key combination: ALT+Y.
	Closes the Zip codes window. Key combination: ALT+S.

## Invoicing Menu

### Collections

Use this section for fast and efficient management of issued invoice payments and to create remittances on a payment or a discount in standard 19 and standard 58 formats.

As you will see on the left side of the screen, the list of portfolios is displayed as seen in the File-Portfolios section. By changing portfolio, the receipts they contain will be displayed.

Below this, there is a filter of receipts which allows you to search by due date or invoice date.

Following this, the bank is displayed to make charges or to generate remittance.

Finally, there are options to generate remittance which will produce a form containing previously selected receipts.

Portfolio												
This window permits the management of payments and collections, as well as the generation of files for the delivery of remittances.												
Portfolio of Collections												
Receipt	Invoice	Invoice Date	Due Date	Clients	Org.	Routing Number	SWIFT	Account	Amount	Paid	Pending	R
14	3 9/16/2012	10/16/2012	0000000004	New Client					86.88	0.00	86.88	<input type="checkbox"/>
15	3 9/16/2012	11/15/2012	0000000004	New Client					86.88	0.00	86.88	<input type="checkbox"/>
16	3 9/16/2012	12/15/2012	0000000004	New Client					86.87	0.00	86.87	<input type="checkbox"/>

The displayed data corresponding to the receipts can be manually modified. To make a modification, click once with the mouse on the area you wish to modify and press "ENTER" on your keyboard. Next, enter the desired data and press "ENTER" again to save the changes.

This option allows you to modify the total, paid or pending amounts in case any of the details on the receipt are incorrect or if you wish to create receipts with higher or lower amounts.

To work with the corresponding receipts, select the "R" box and click on the receipt with the right button of the mouse.

The following payments options are displayed:

Select all: option for marking or unmarking all receipts displayed in the portfolio.

Delete receipt: Permanently deletes the selected receipt/s.

Send to: Removes the receipt from this portfolio and saves it in another selected portfolio.

Paid: Displays the receipt as paid.

Cancel: Leaves the options menu in order to work with the receipts.

## **Create/Modify Bills and Invoices**

From this window, you can invoice the bills manually to clients or by applying the fees automatically.

The window is divided in three sections; the header of the document, the body and the footer of the invoice.

### **Invoice Header.**

The header of the invoice displays the invoice number, the date, the code and case.

The client details are also displayed on the right. To select a client, simply click on the magnifying glass icon which appears next to the text; "Client". You will immediately see a list containing the current clients available to select. The first data to select in order to generate an invoice is the client.

Type	Payment Code	Description	Amount	Sales	Value
1	0000000001	Other Invoicing Payments	0.00	1	250.00
2	0000000002	Payments			150.00

### **Invoice Body.**

In the body of the invoice, enter the fees, advance payments, supplies of funds or any other type of bill.

Before entering a code, you must select the relevant type from among the following options:


- 1.-Payments.** The program will treat this payment as a simple payment for invoicing.
- 2.-Advance Payment.** Indicate that the payment is an advanced payment.
- 3.-Apply criteria.** Use this option to apply criteria.

**Asistente para la selección de tarifas de honorarios**

II - Jurisdicción civil

- ..... 1 - Actividades previas
- ..... 2 - Procesos declarativos
- ..... 3 - Recursos
- ..... 4 - Rescisión y revisión de sentencias firmes
- ..... 5 - De las ejecuciones
- ..... 6 - Medidas cautelares
- ..... 7 - Tercerías
- ..... 8 - Procesos sobre la capacidad de las personas. Filiación, paternidad y maternidad.
- ..... 9 - Derecho matrimonial
- ..... 10 - De la división judicial de patrimonios
- ..... 11 - Procesos monitorio y cambiario
- ..... 12 - Otros procedimientos y actualizaciones

Buscar norma:



< Atrás    Siguiete >    Cancelar

### Additional actions on the invoice

If you press on the right button of the mouse, a menu will appear which will allow you to apply a general arrangement to increase or reduce the amount in the line, and delete the selected line from the invoice.

If you want to apply a general arrangement, another window will appear in which the program allows you to select a general arrangement or increase or reduce the amount manually.

By doing this, the program adds the function to the detailed description of the invoice.

### Invoice Footer.

Finally in the invoice footer, a table with the applied taxes of the invoice will be displayed with their totals.

### Actions to be carried out on the Invoice

#### Form of Payment and Bank

Select the form of payment and the bank with which the invoice charge will be made.

#### Printing Format

Select the appropriate format from the list to print the invoice.

**Recover an Invoice.** To recover a previously stored invoice, click on the magnifying glass next to the document header.

**New Invoice** Empties the screen and supplies the next invoice number.

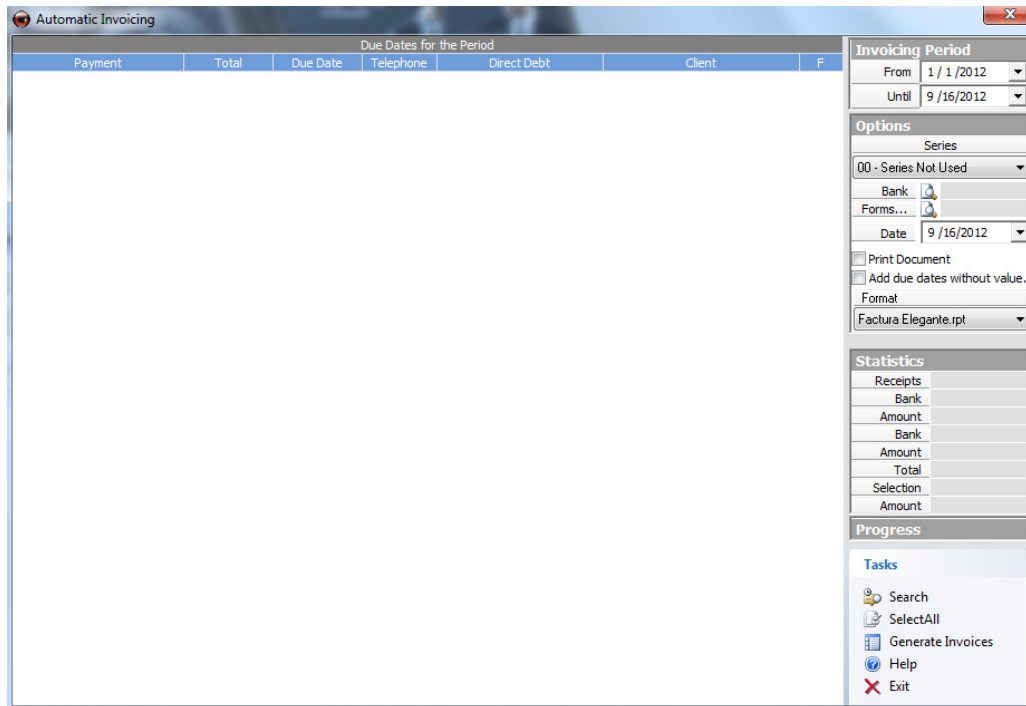
**Save Invoice.** Stores the invoice in the database.

**Delete invoice.** Deletes the invoice from the database.

**Print Invoice.** Prints the invoice in the previously selected format.

## Automatic Invoicing

From this section you can bill regular payments recorded in the clients' dates.



### Invoicing Period

Indicate the date range which the program will use to search for due dates.

### Options

Select the form of payment and the bank via which bills will be charged. You can also indicate if you would like the invoice to be printed at the end of the process, add due dates without value and select the format for printing.

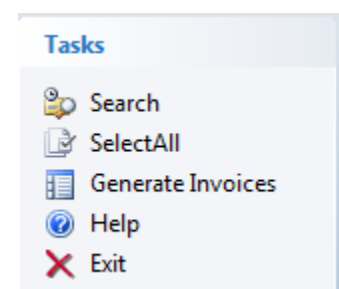
### Tasks

In the tasks bar you can:

**Search for Due Dates.** Begin the search with the previously indicated criteria.

**Select All.** Automatically selects all due dates in the list.

**Generate Invoice.** Create invoices for the selected due dates.



### List/Search Invoices

Use this window to find, using various criteria, invoices created in the law firm. These will appear in a list from which you can select the relevant invoice and click on it twice with the left button of the mouse to edit it or click on it with the right button of the mouse for more options.

Invoice Number	Date	Channel	Client	Name	Gross	Discount	Sales Tax	Net
3	9/16/2012	00	0000000004	New Client	250.00	250.00	0	10.63
4	9/16/2012	00	0000000004	New Client	100.00	100.00	0	4.25
5	9/16/2012	00	0000000004	New Client	250.00	250.00	0	10.63

Modify Invoice  
Print Duplicate

Actions

**Filter Invoices**

**Number**

**Channel**

**Client**  
 From

Until

All Clients

Invoice Date

Start Date

End Date

**Amount Invoiced**

**Outstanding**

**Tasks**

- Search
- Print Invoice
- Edit Invoice
- Close

The actions panel displays options available to search for invoices and includes searching by number if already known, the channel of invoices, the client or the rank of billed clients and the rank of issue dates as well as the possibility to search invoices by defined amounts.

For each search, enter the necessary data and click on the "Search" option. Once you have finished searching for invoices, you can exit the window by selecting "Close" on the actions panel.

### Print Lawyer's Bills and Invoices

This option displays the printing form in order to issue a copy of the invoice which has been previously saved.





Select the range of documents from the window for printing. To select only one, indicate the same document number in the fields; "From" and "Until".

By clicking on the magnifying glasses, you can select one of the saved documents for printing.

It is also possible to print all created documents for a set range of dates. To choose this option, open the drop-down menus and indicate the date ranges you wish to print.

The printer selection displays the predetermined printer installed on your operating system, as well as all installed printers on your PC or network.

On the right side of the window, you can select the number of copies of the documents you need, the paper orientation with which you wish to print the documents (vertical or horizontal) and the order in which the documents will be displayed (in numerical or alphabetical order).

## ***Estimate***

This section allows you to issue the client with estimates. You can create this in the same way as an invoice created from the "Create/Modify Bills and Invoices" option.



Actions for estimates are the same as those used for invoices, so you can; create, modify, delete and print them. Estimates have their own invoicing and numbering channel, separate from that of invoices. One of the differences with estimates is that an estimate can have several conditions; Accepted, Modified or Repealed, indicating the condition with respects to the client for whom the estimate was issued.

**Print Estimates**

Displays the print window to print estimates issued by the law firm.

**Sales Log, Advance Payment Log, Payment Log.**

From this menu you can print the official sales, advanced payment and payments log.



Use this section to select the dates to display calculations.

Next choose the desired printing options.

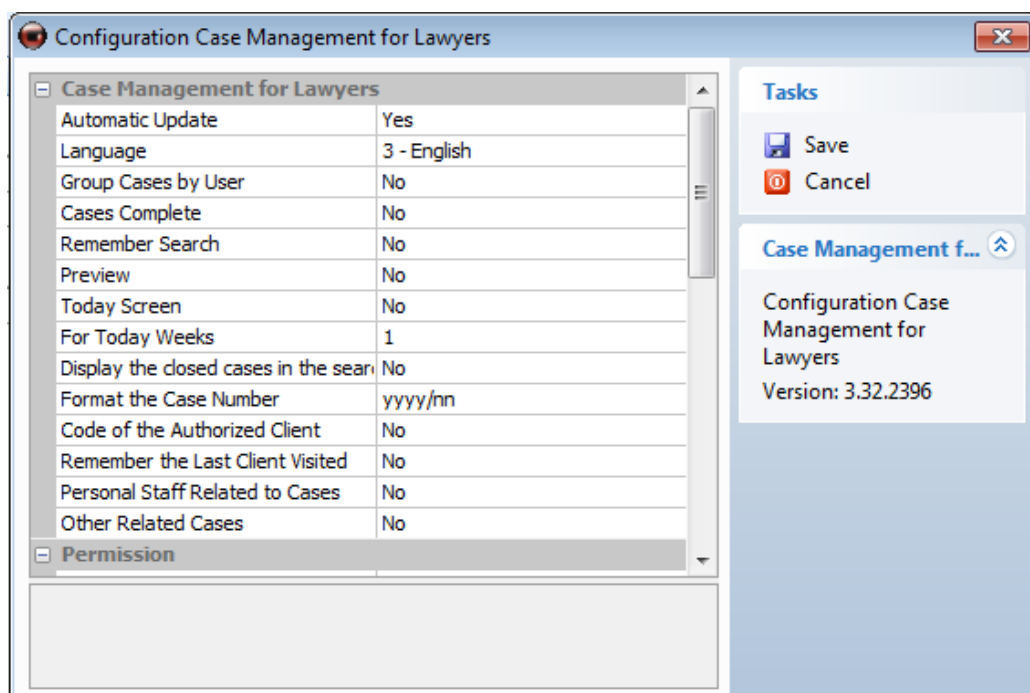
On the right side of the window, you can select the number of copies you wish to make, the paper orientation (vertical or horizontal) and the order of the documents (in numerical or alphabetical order).

The date the document was obtained and the first page number are also displayed.

### *Utilities menu*

## **CONFIGURATION**

Use this menu to modify the configuration options of CASE MANAGEMENT.



The options which appear in the configuration window include the following applications:

**CASE MANAGEMENT Automatic Update:** If you mark this option as "Yes", the program will notify you when a CASE MANAGEMENT update is available.

**Group Cases by User:** Displays cases in the search list grouped by user.

**Display Search Window at Start Up:** Always displays the popup window for searching cases when initiating the program.

**Remember Search:** The program remembers the last filter used in the case search so that every time the application is initiated, it is applied to the list of cases.

**For Today Screen:** Displays the "For Today" screen by default when the application is initiated.

**For Today Weeks:** Indicates the number of weeks for the tasks on the calendar that you wish to appear in the "For Today" screen.

**Display the Closed Cases in the Search:** By enabling this option, closed cases will always be displayed by default in the case search alongside all cases.

**Format the Case Number:** Establishes the format of the law firm's case numbers.

**Code of the Authorized Client:** Indicates whether the program's internal code is enabled in the client's record card.

**Remember the Last Client Visited:** The client's record card remembers the last displayed client.

**Staff Related to Cases:** Mark this option to show or hide staff related to a case.

**Other Related Cases:** Mark this option to show or hide other related cases.

**Permissions:** Here you can indicate if new created clients and cases are going to be public (visible by every lawyer within the company) by default.

**Show download report:** If this option is activated, a report will be automatically displayed after every update.

**Case Window Style:** allows you to set a style for the case window.

**Arrange Documents by Number/Arrange jobs by date:** Select type of arrangement for documents and jobs within the program.

**Calendar:** Use this option to select the intervals (minutes) which appear on the calendar.

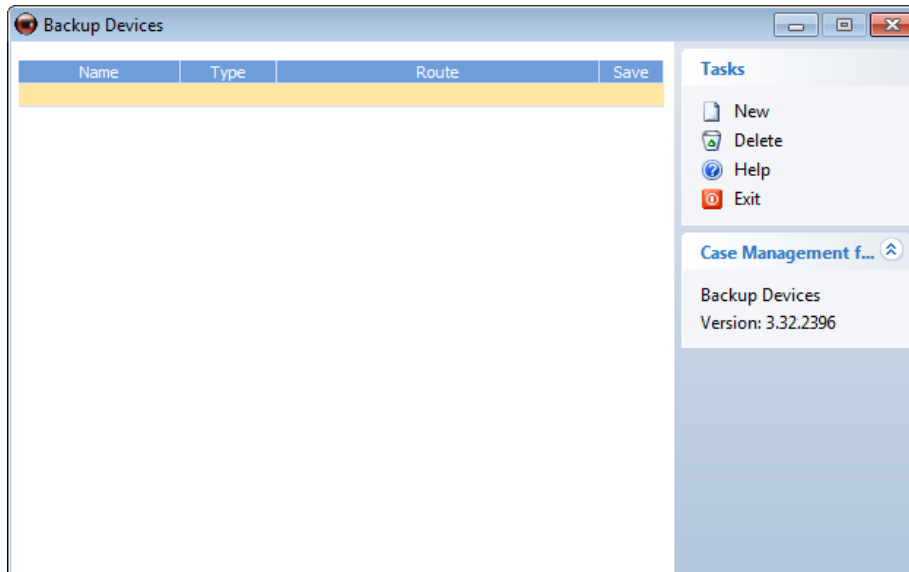
**Labor Schedule:** Enter the hours of labor schedule.

**Alerts:** Select the time interval for displaying warnings.

**Version:** Displays the details of your version of CASE MANAGEMENT.

## **BACKUP DEVICES**

Use this option to select the program backup device. These devices will be the location where backup copies will be created.



The window includes the following fields:





**Name:** Enter the name of the device.

**Type:** Select if disk or cassette.

**Route:** Select the route where the file will be created.

**Save:** Click on the save  icon to save the device.

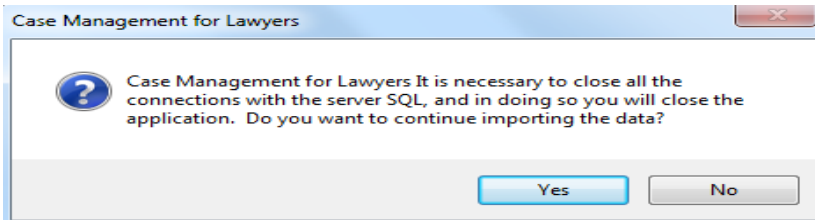
## TASKS

	Select a new route where you wish to create a back up copy device. This command can also be performed with the key combination ALT+N.
	Deletes the selected file from the database. Key combination: ALT+B.
	Opens the help window. Key combination: ALT+Y.
	Closes the window application. Key combination: ALT+S.

## BACK UP

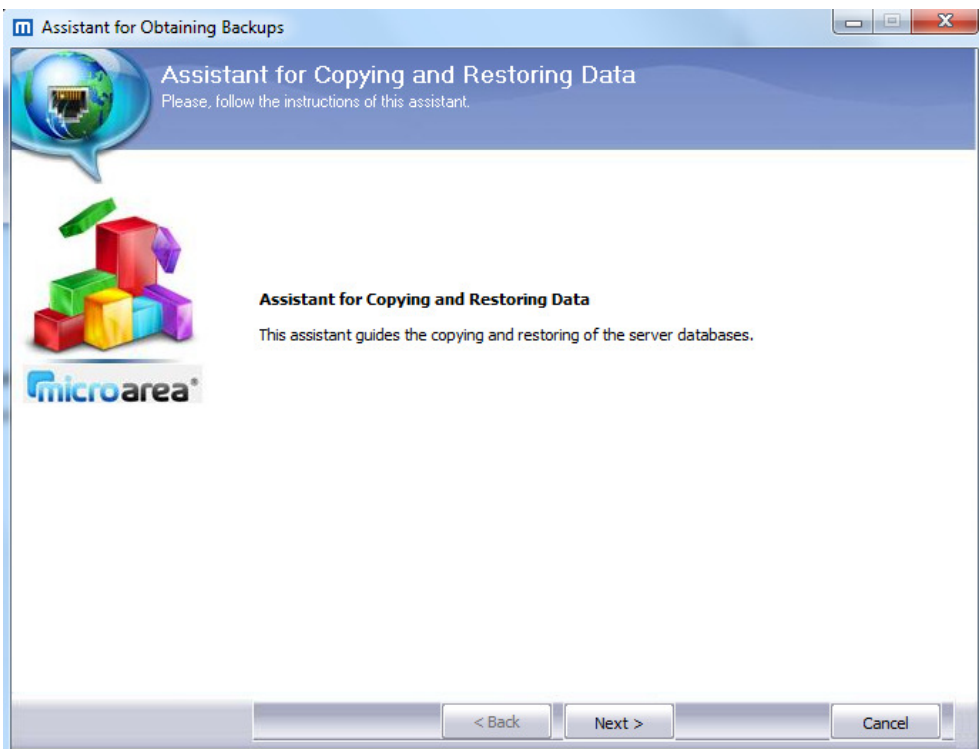
Use this utility to create a backup copy or to restore the program's data.

By selecting the Back Up utility, the following window will appear indicating that the application must be closed in order to create a backup copy.



When the application is closed, the assistant window will open to begin copying and restoring data.

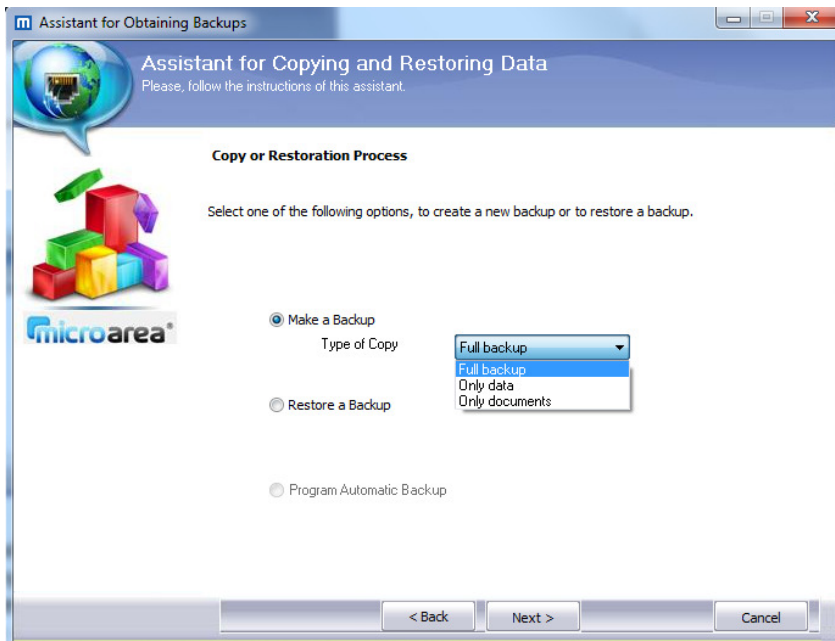
Click "Next" to continue.



The assistant consists of three areas: make a back up, restore a back up and program automatic backup:

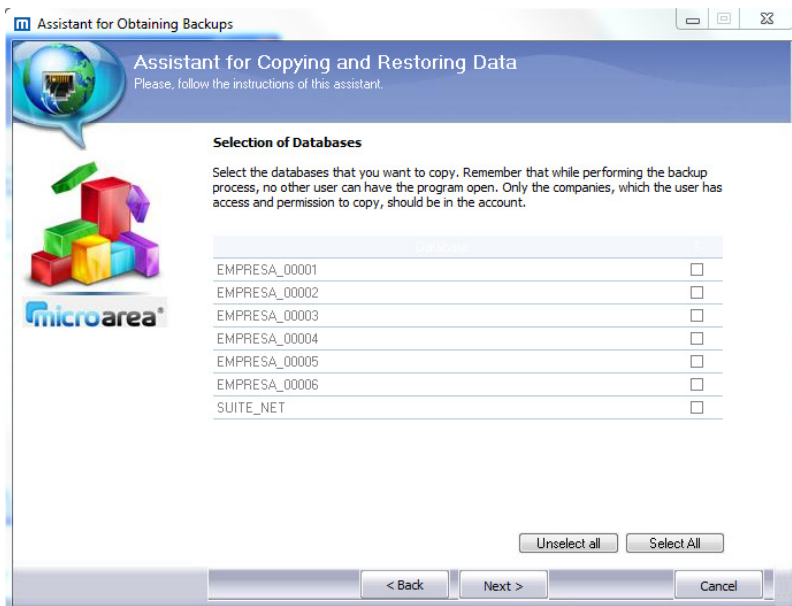
### **Make a backup.**

**1** To begin the backup, select "Make a Back up" and select the type of copy you wish to make from among the available options which are: "Full backup"; if you wish to make a copy of the data stored in the database and of the documents associated to the law firm, "Only Data" if you wish to copy only the law firm's data stored in the database and finally "Only Documents" if you wish to copy only the documents related to the law firm. Once you have selected the option, click on "Next".



2 The next window will appear where you will need to select the databases that you wish to add to the backup copy. While the backup copy is being made, no other users must have the program open. Only companies whose user has access and permission will appear in order to be copied. Select the companies that you wish to add to the backup copy by selecting S.

Click on "Next" to continue.



3 Use the next window to enter a description of the backup (this data is optional) and select the device where the backup copy will be made and the route destination where it will be saved.

Click "Next" to continue.

Assistant for Obtaining Backups

Assistant for Copying and Restoring Data  
Please, follow the instructions of this assistant.

**General Options**  
Select the destination of the file to copy from the following options.

Description of the Copy (Optional)

Attach the File

Use password

Password

Repeat password

**Destination of the Copy**

Backup Devices  
Select Device

Location of the Device:

Select the Location of the Copy File

Route of the File

Cassette  
Select Cassette

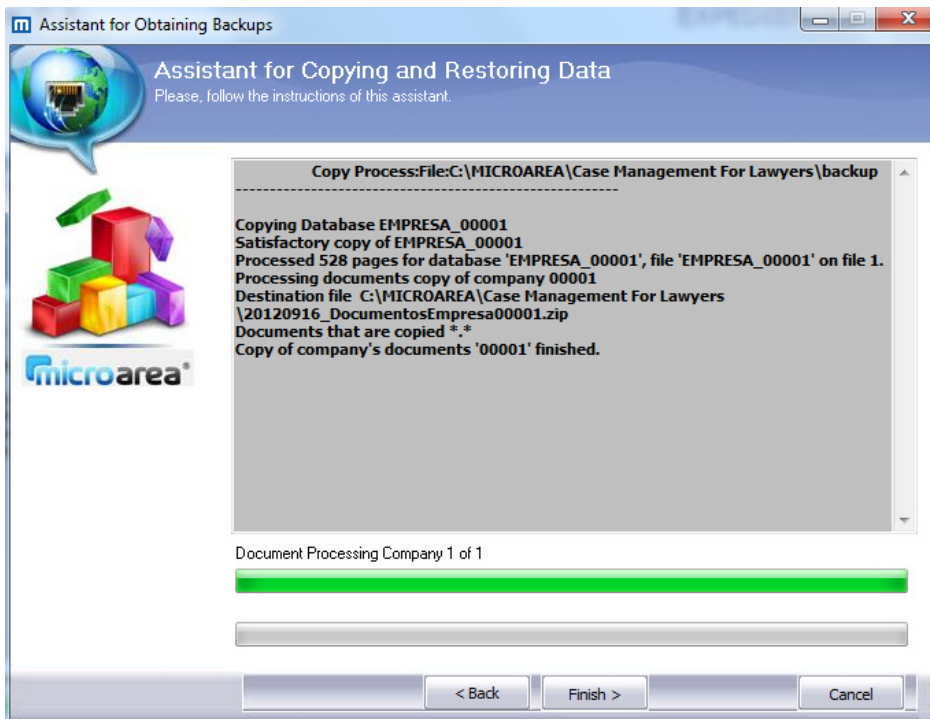
< Back   Next >   Cancel

If in the first step you selected the option for copying data, an extra step will appear which allows you to select the folder containing the documents to copy. You can search the folder which has been configured as the route for the documents in the law firm's record card.

4 In the next window, a report will be shown with the data included in the back up copy.

Click on "Finish" to exit the assistant.

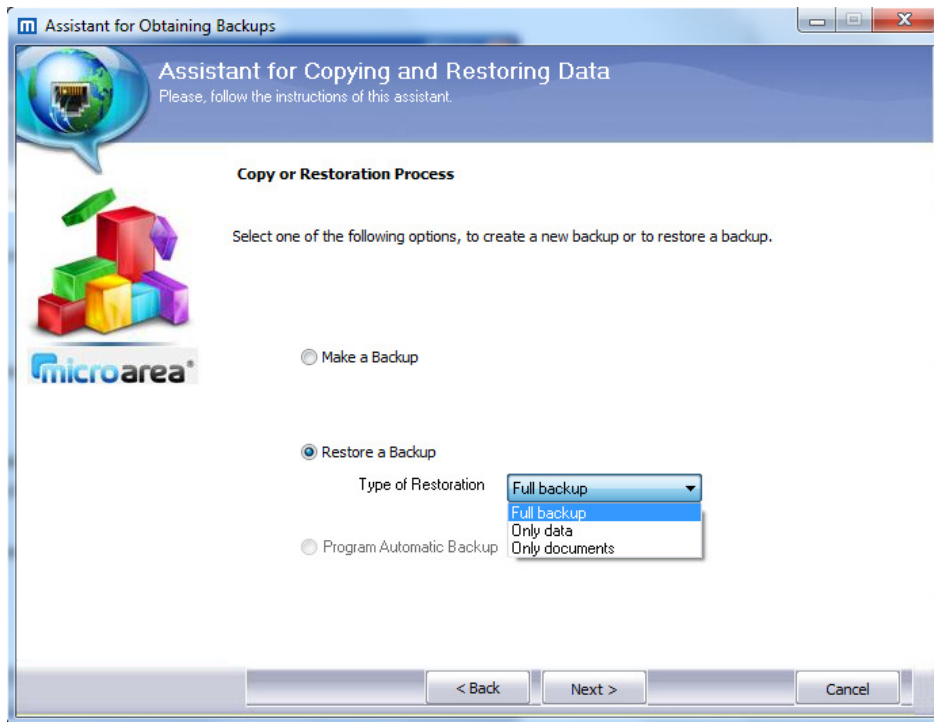




### Restore a backup.

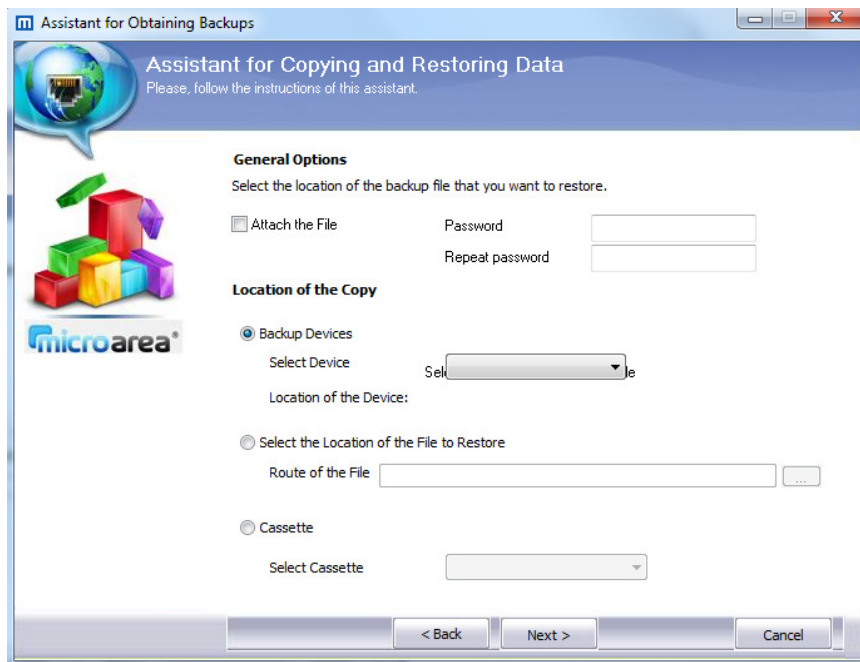
- 1 This process is used to restore a previously created backup copy.

To begin restoring a backup copy, select "Restore Back up" on the next screen, then select the type of restoration and click "Next".



2 The next screen will ask you to select the device or route where the copy was stored upon creation.

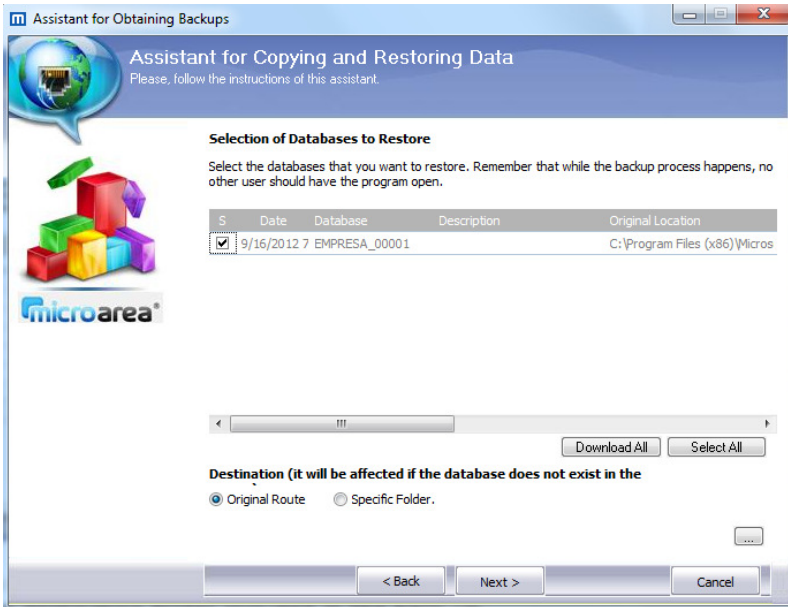
Click on "Next" to continue.



3 The next window will display the companies stored in the back up copy and by selecting S, You can check the ones you wish to restore. If there is data of a company

already stored on your computer, this will be replaced with the data on the back up copy.

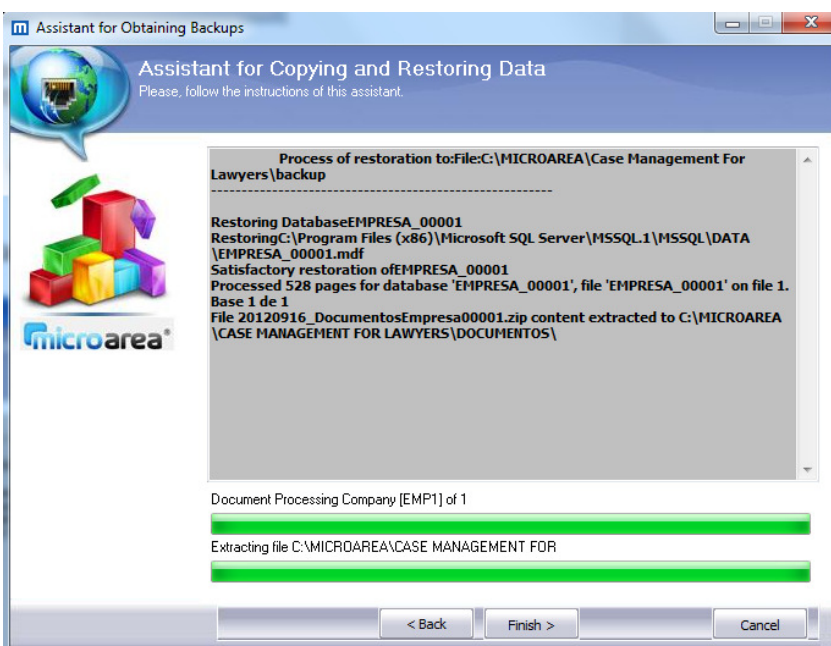
Click on "Next" to continue.



If you selected the option to restore documents, then the next window will display a list allowing you to select the destination folder included in the back up.

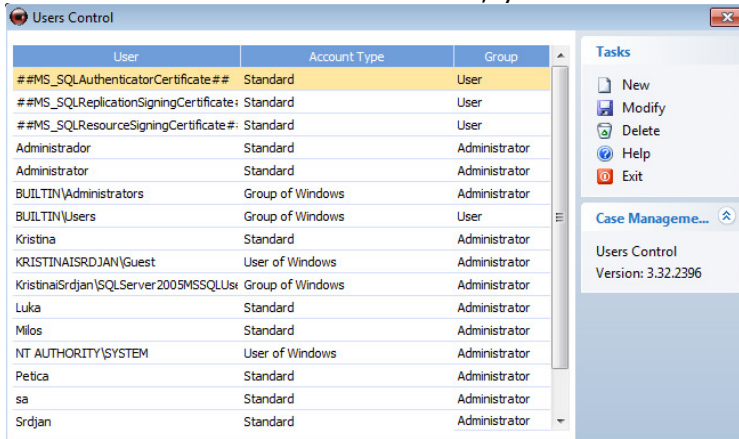
4 The next window will display a report with the restoration process data being carried out on the PC.

Click on "Finish" to exit the assistant.



### CONTROL OF USERS AND PERMISSIONS

In the "Control of Users" submenu, you can create and delete users of the program.

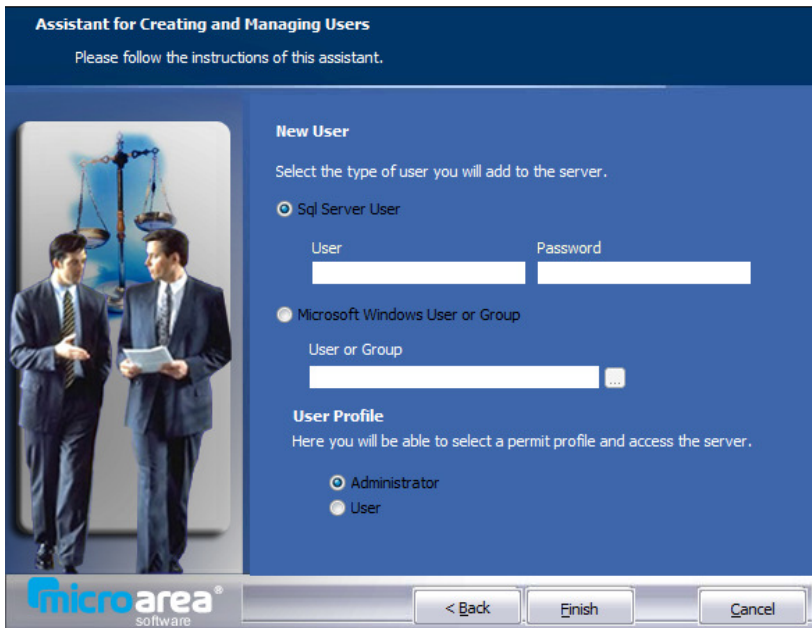


When you select control of users from the utilities menu, a window like the following will appear.

If you do not have administrator privileges, you cannot modify, create or delete users and it is not possible to delete administrators.



### Creating a new user

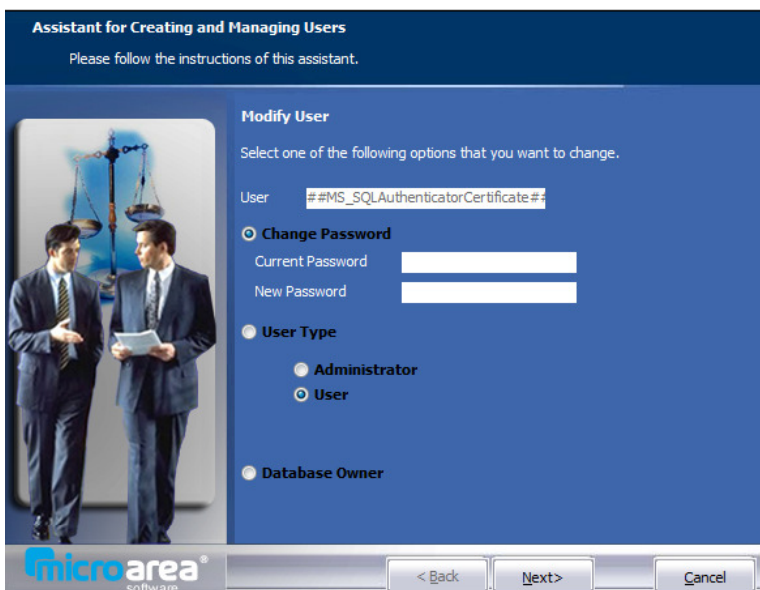


When creating a new user, this user can be a Windows user (this option is available only if working from your own server) or a SQL Server.

Select the type of user: Administrator or User.

By marking the user option, the program will display a table containing a list of companies for assigning special permits.

### Modifying a user



If you click twice on an existing user or by clicking on "Modify" on the Tasks menu, a window like the following will appear. Use this window to modify a user's password, the type of user or to assign a database.

If you wish to modify the password, you must first enter the user's current password and then enter the new password you wish to use from that moment onwards.

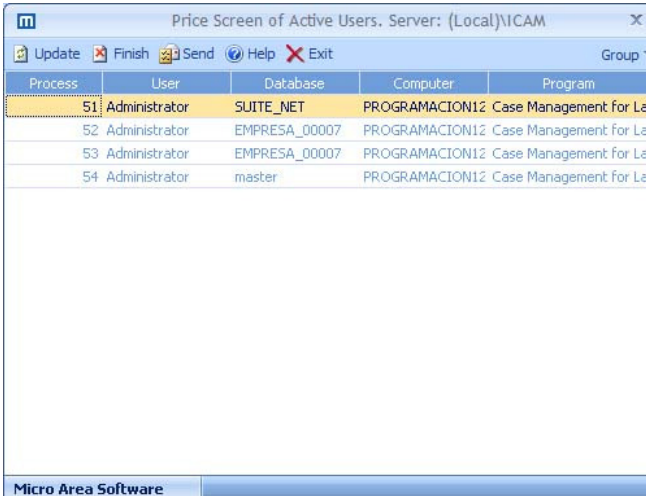
You can also change the user type by marking "User", and a window will appear from which you can select the company and permissions from the table.

Finally you can change the database owner.

Remember that if a user is a database owner, that user will benefit from all privileges on the database.




## ACTIVE USERS SCREEN



Use this submenu to view all users working with the application, as well as the processes they are carrying out, which databases they have open and which computer they are working on.



Process	User	Database	Computer	Program
51	Administrator	SUITE_NET	PROGRAMACION12	Case Management for La
52	Administrator	EMPRESA_00007	PROGRAMACION12	Case Management for La
53	Administrator	EMPRESA_00007	PROGRAMACION12	Case Management for La
54	Administrator	master	PROGRAMACION12	Case Management for La

## Tasks

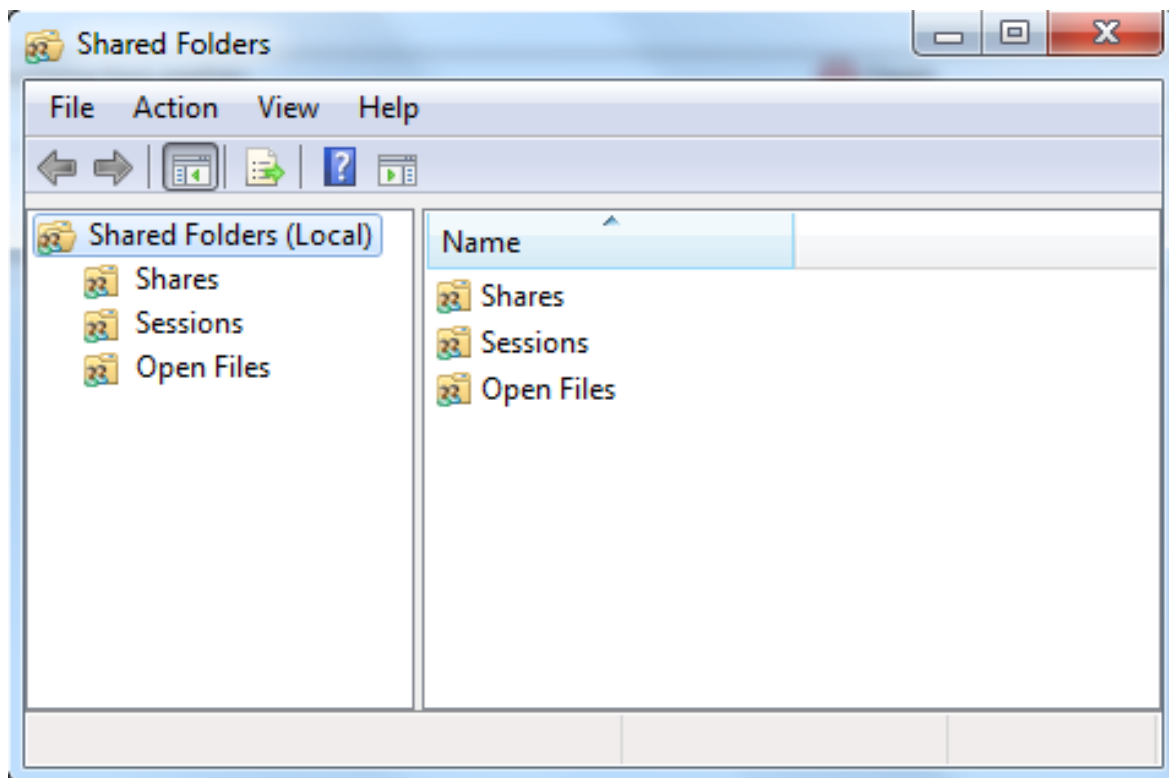
	Updates the screen. Key combination: ALT+A
	Ends the selected process. Key combination: ALT+T
	Sends a message to the selected user. Key combination: ALT+E.

	Displays the help window. Key combination: ALT+Y
	Exits the window without saving changes. Key combination: ALT+S

## NETWORK MONITOR

From this submenu you can access the “Windows Network Monitor” program.

Use the “Network Monitor” to see the users connected to a computer.



## DATA ADMINISTRATOR




The data administrator is used to keep the program in good condition. It can be used to avoid potential problems which may arise while using the program (e.g. restarting the computer when the program is in use, and so on).

**Help Menu.**

**About CASE MANAGEMENT FOR LAWYERS**

The submenu about CASE MANAGEMENT FOR LAWYERS displays a window containing information regarding the user name which was used to register the program, the license number and the license contract which was accepted.

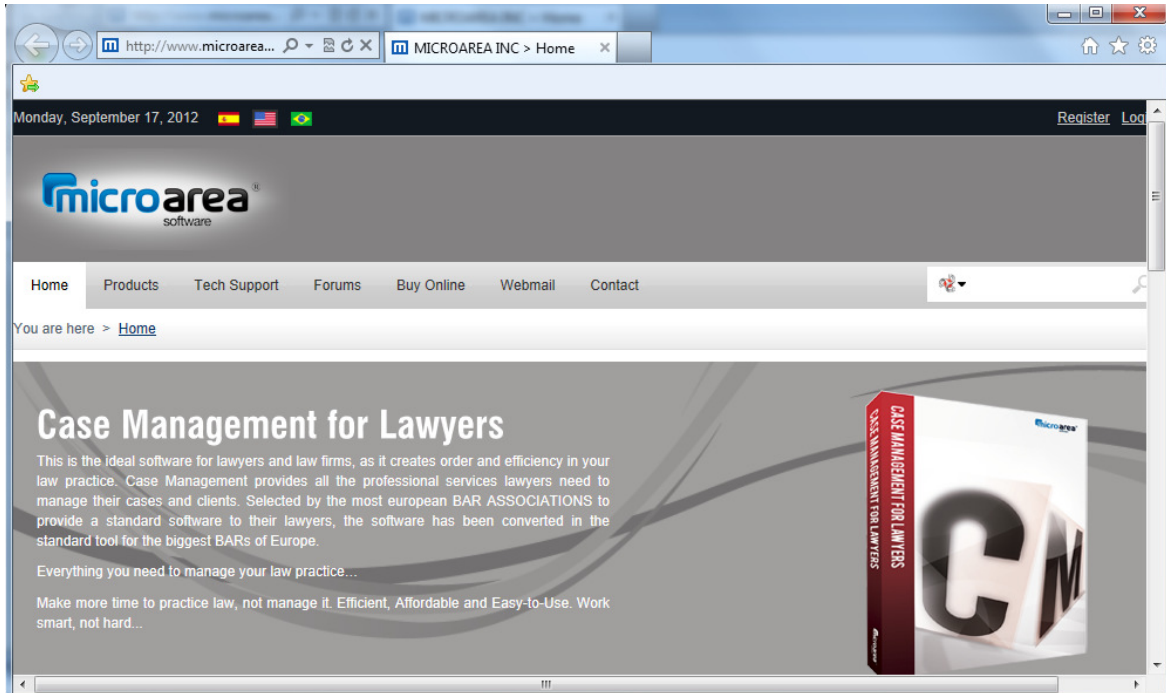


	Opens the program's help menu. Key combination: ALT+A.
	Opens Windows system information.
	Exit FILE MANAGEMENT. Key combination: ALT+S



### ***MicroArea Website***

From the main webpage you can access various services offered by Micro Area available on the Internet, such as law information and advice, updates, access to frequently asked questions and online enquiries etc...



### ***Internet Consultations***

Micro Area offers you online technical support. If you are connected to Internet, are a CASE MANAGEMENT FOR LAWYERS user and have a question or problem which you wish to put forward, do not hesitate to contact us via this method of communication. You will save money and time.

### ***News list***

Subscribe to our news list and you will receive daily information of interest to your company. New options will be added also upon request. This service and subscription are completely free.

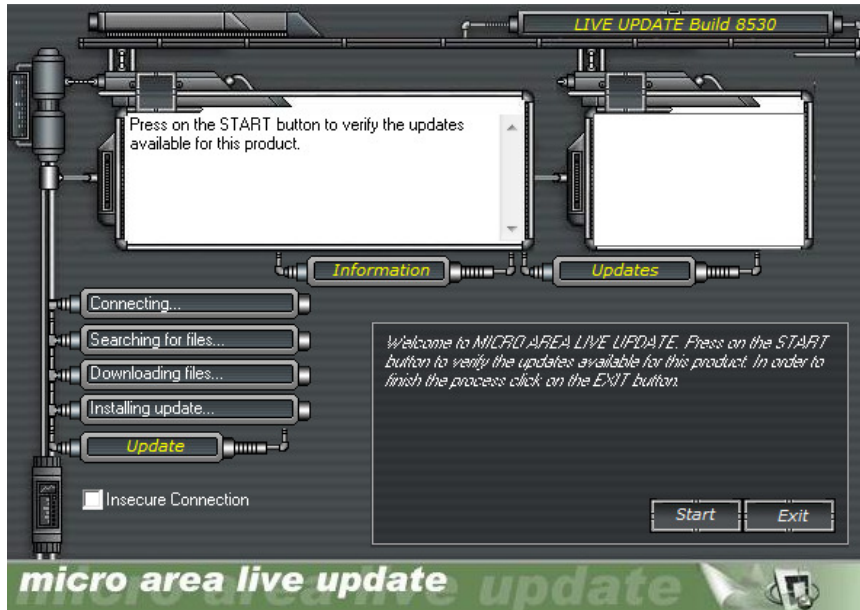
### ***CASE MANAGEMENT FOR LAWYERS Live Update***

This feature provides you with an easy and efficient way to download program updates.

Live Update will check for the current version installed on your PC and will automatically update the program with the latest version.

After clicking on Live Update, your consent will be requested to begin the download.

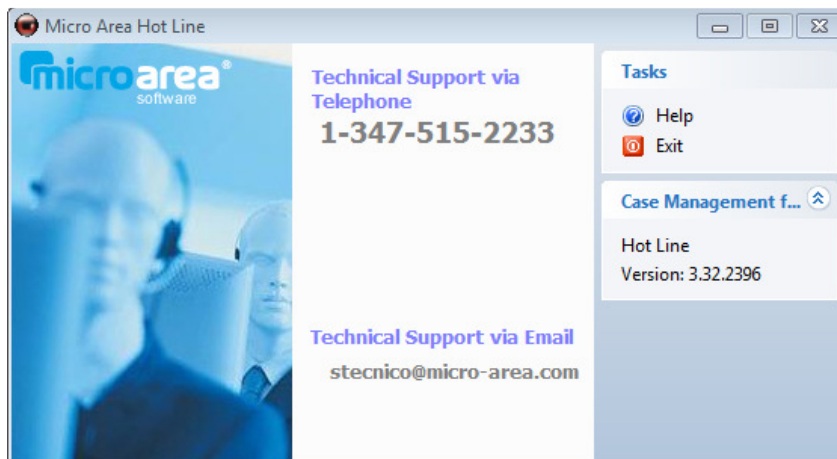
Once the databases are closed and the Live Update versions are checked against those already installed, a screen will appear displaying the possible modules and updates.



Just click on the start button for the program to begin searching, downloading and installing.

### Hot line

This submenu shows details of telephone and fax numbers to get in contact with our Technical Support Department.



## **CASE MANAGEMENT FOR LAWYERS help**

CASE MANAGEMENT FOR LAWYERS offers a help system based on hypertext. You can access this system by typing F1 from any of the program's windows or by using this manual. This option can also be activated on the main menu.

### **Printing a help subject**

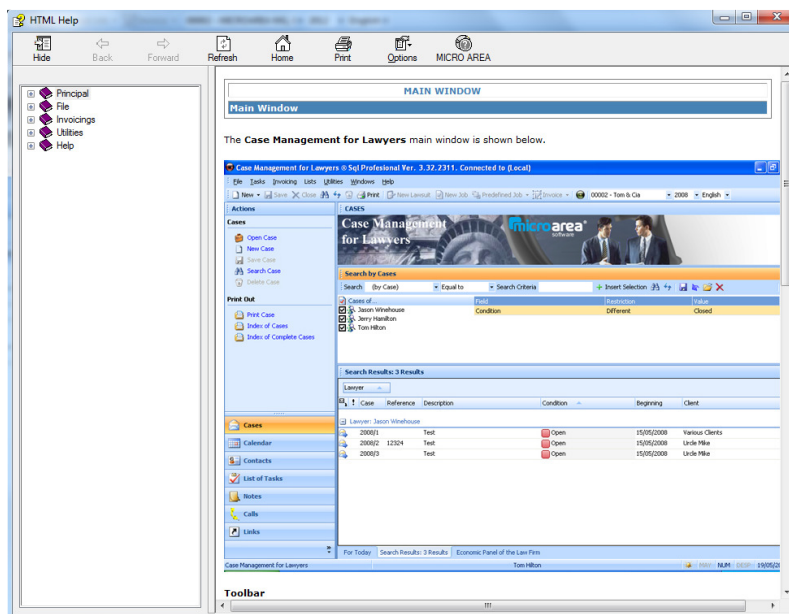
Click on "Print" or "Options" on the help subject you wish to print.

You can also use the left mouse button to select options from the help window and then print a subject.

### **Suggestions**

You can print a group of related subjects if you click on a specific content area of help and then by clicking on "Print".

To print help from a popup window, use the right button of the mouse to click on an option within the popup window and then click on print subject.



### **Activate Product.**

Use this option to activate the serial number of the product.

### **Windows Update**

From this utility, you can have direct service to automatic Windows updates.

