



***completeLAW*[™] Setup and Reference Guide**

Version 2.3

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Note: The original Guide is 100 pages long. The first several pages are shown here.

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Introduction

Thank you for your investment in *completeLAW*! This document describes the tasks necessary to set up and begin using *completeLAW* in your office. It is important to complete all basic setup tasks before you begin using the software so you can take full advantage of all of its features and functions.

As You Begin Using completeLAW...

We suggest that you work with *completeLAW* applications in the order listed below.

1. Make sure that your firm information, statement format, and sufficient codes to reflect your primary practice area are entered and saved.
2. Add a new client.
3. Edit/work with existing client data, including any converted client-matter records from your previous system.
4. Enter billing items for time, expense, flat rate services, or other purposes.
5. Add events for a client -- such as a court appearance or consultation -- to your calendar.
6. Run a WIP [Work in Progress] report to verify all billable events are included. Verify that all billing items for each matter are appropriately entered.
7. Generate your first statement using *completeLAW*.

In general, this document will follow a similar path.

Use Single-Click Mouse Functionality

Important! For best results with *completeLAW*, we suggest that you use a single click mouse setting in Windows. To make sure that you have selected a single-click setting:

1. Open **My Computer**.
2. Click **Tools**, and then choose **Folder Options**.
3. In the **Click Items as follows** area, click the radio button next to **Single click to open an item [point to select]**.
4. Click **[OK]**.

Important Terms

Term	Definition
Archive	A storage area for billed services and expenses
Client/Profile	A series of pages for storing, editing, and managing all information a client and each matter
Code	An alphanumeric abbreviation that represents standardized text. It allows you to insert text in fields with less typing, and maintains consistency in the way verbiage is used across the firm for outputs such as billing item statements Codes are modifiable to support your firm or practice's unique needs
Cursor	A movable marker that indicates a position
Document Management	A module in <i>completeLAW</i> that allows you direct access to Word or WordPerfect documents and merge operations specific to the client and matter
Field	A text or lookup area in a <i>completeLAW</i> screen where you will be providing data
"Hot" page	A page that resets automatically for the next entry when you click any place on the page. Two pages are currently hot: The Receipts page, and the Contact Manager page
Narrative/Auto Bill	A feature in the Client/Profile that allows for automatic billing and the creation of notes to the file
Page	A place to enter information into a screen of <i>completeLAW</i> . It also stores and displays existing information
Parameter	A fact or value required by <i>completeLAW</i>

Login Types

Three login types are available in *completeLAW*. In general, the login type governs what functions are available to a user, as summarized below.

Login Type	Sample	Functions
Attorney	DPS	<ul style="list-style-type: none">▪ Enter time using FastBill or in Time & Billing▪ Add to and manage your calendar▪ Run reports [Attorney, client, case]
Administrator	001	<ul style="list-style-type: none">▪ Add and change attorney time entries through Time & Billing▪ Post payments and generate statements▪ Access the accounting module [if added as an option]
Timekeepers	ABC	<ul style="list-style-type: none">▪ Create new clients▪ Enhance existing client records▪ Perform time entry in Time & Billing <p>Note: The features and functions that are available to office staff can be determined by the Administrator</p>
Staff	OAB	<ul style="list-style-type: none">▪ Perform all tasks that timekeepers can perform, with the exception of business reports

System Defaults and Codes

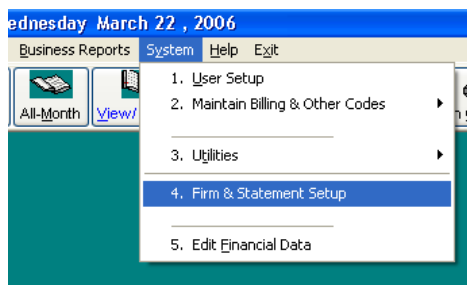
Several simple tasks are required to configure *completeLAW* before you begin using it. They are described in the following sections.

Firm & Statement Setup

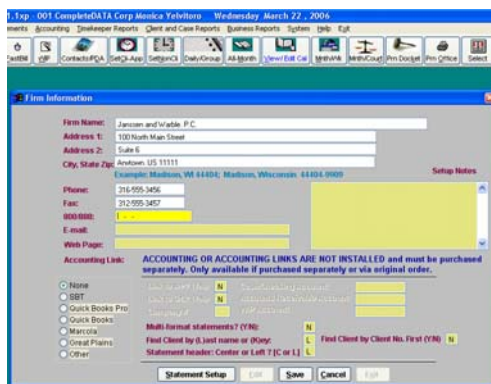
The Firm & Statement Setup pages provide you the opportunity to set the defaults for both firm contact information and the format and information that appear as a standard on your statements.

Firm Information

1. From the Menu Bar, select **System > Firm & Statement Setup > Firm Setup**. The Firm Information dialog appears.



2. Click **[Edit]**.



3. Verify the firm's name, address, telephone, FAX and e-mail. Make any changes necessary.
4. If you wish to print statements with multi-formats, enter **Y**. If not, enter **N**.
5. If you want to search for clients by last name only, enter an **L** in the Find Client by Last Name box. To search by key code, enter **K**. If you prefer to search for clients by the client number, enter **Y** in the "find Client by client No. First field.

- For a Left-justified statement header, enter **L**. For a Centered header, center **C**.

- Click **[Save]**. Remain on the Firm Information Page.

Statement Setup

- Click **[Statement Setup]**. The Statement Information page that appears depends upon your selection in step 6, above.
- For either format, enter **Y** if you wish to use a horizontal line below the firm name, and **N** if you do not.
- Enter all the other text you want to display.
- Choose whether you want your letterhead centered, or flush left.
- Print a test copy of the Statement, and make adjustments with the format until you are satisfied. The fonts are set to your current letterhead.
- Click **[Help]** for more information.
- Click **[Statement Setup]** to enter the information that will display on your statements. [Note: Examples of the left and center formats appear below.]
- Click **[Save]** to store your information and exit the setup screen.

Below is a statement setup page for a left-justified output.

Below is a statement setup page for a centered output.

User/System Setup

All of your timekeeper codes are pre-created as part of the *completeLAW* installation. Use the User/System Setup page to establish the default operating environment for each user.

From the Menu Bar, select **System > 1. User Setup**. The User/System Setup dialog appears.

1. Enter an attorney or user code.
2. Add or modify the information in each field shown below as necessary.
3. When you are finished, click **[Save]**.

Important! You may NOT discount more than the amount that has been billed -- or is about to be billed. You can verify this by going to the [Fin] page and viewing the amounts due.