



**LAW  
MASTER<sup>®</sup>**

Law Practice Technology

# Lawyers Workbench

v 21-11a

Upgrade.

A MASTRIN CREATION

## Table of Contents

Lawyers Workbench – Navigation Guide.....	5
Logging into LawMaster.....	5
Help Files.....	7
LawMaster Client Service Centre – Client Help Desk.....	10
Navigation.....	11
Grids.....	13
Entity Search.....	17
Matter Search.....	20
Entity and Matter Search.....	22
Matter Workbench.....	25
Entering File Notes, Time and Disbursements.....	25
Correspondence.....	26
Write a Letter.....	27
Write a Fax.....	30
Add Matter Party.....	31
Phone.....	32
Sending Emails.....	33
Folios.....	35
Export to File System:.....	37
Publish to PDF.....	37
Print:.....	37
Folio Viewer.....	39
Outlook Integration - Sending & Saving Emails.....	40
Sending Email from LawMaster.....	41
Sending Email from Outlook.....	42
Folio Attachments.....	43
Saving Incoming Emails to LawMaster.....	43
Saving Documents.....	47
Templates.....	47
Lawyers Toolbar.....	48
Recent Matters.....	48
Favourites.....	48

Knowledge Workbench .....	48
Bringups .....	49
Time .....	51
Performance .....	52
My Contacts.....	52
Personnel .....	52
Inwards Correspondence.....	52
Requisitions.....	52
Draft Bills .....	53
File Notes.....	53
My Reports .....	53
My Documents.....	53
Creating Entities.....	55
Main .....	56
Additional Addresses.....	59
Financial Information .....	61
Other.....	63
Notes.....	64
Adding Related Entities .....	65
Adding Attributes .....	66
Adding Matters .....	68
Tasks & Events.....	70
Cabinets .....	72
Adding a Cabinet.....	73
Add Cabinet Items .....	74
Changing the Order of Documents in a Cabinet.....	74
Creating Sections Within Cabinets .....	74
Saving Changes to Cabinet Items .....	75
Exporting Cabinets .....	75
File Referrals (Folios and Cabinets).....	76
Adding A Referral.....	76
Viewing Referrals .....	77
Marking a Referral As Read.....	78

Modifying Referrals .....	78
Reviewing Referred Items .....	78
Billing.....	79
Closing/Archiving Matters.....	85
Logging Off LawMaster .....	85
Function Keys.....	86
Window Buttons .....	86

## Lawyers Workbench – Navigation Guide

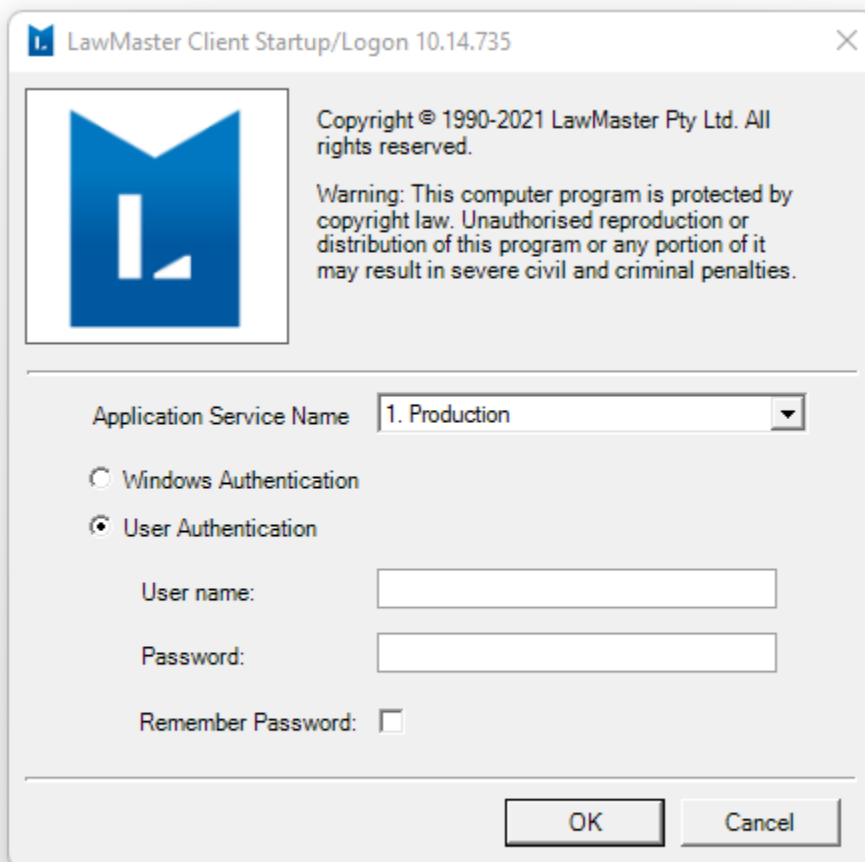
This Navigation Guide provides details on the Lawyers Workbench functions. The Lawyer's Workbench enables you to complete your day-to-day tasks by providing an alert toolbar, easy access to matters, range of actions such as adding clients, matters, producing bills, file notes, time recording, workflow and preparing correspondence.

## Logging into LawMaster

From your Windows desktop double click on the LawMaster icon.



This will take you to the logon screen:

The image shows a Windows-style dialog box titled 'LawMaster Client Startup/Logon 10.14.735'. The dialog box has a close button (X) in the top right corner. On the left side, there is a large blue 'M' logo. To the right of the logo, the text reads: 'Copyright © 1990-2021 LawMaster Pty Ltd. All rights reserved.' Below this, a warning message states: 'Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program or any portion of it may result in severe civil and criminal penalties.' The main area of the dialog box contains a dropdown menu for 'Application Service Name' with '1. Production' selected. Below the dropdown are two radio buttons: 'Windows Authentication' (unselected) and 'User Authentication' (selected). Under 'User Authentication', there are two text input fields: 'User name:' and 'Password:'. At the bottom left, there is a 'Remember Password:' checkbox, which is currently unchecked. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

A list of available databases is provided from the Application Service Name drop down box. This will default to the firm's Production (or 'live') database.

When the User Authentication option is selected you must enter your username and password → Click **OK**.

If the Windows Authentication option is selected (and the appropriate security settings have been applied) it is not necessary to enter your username and password. Simply Click **OK**. LawMaster will use your network logon.

Once you have successfully logged on using either User Authentication or Windows Authentication the LawMaster program will open and display the Lawyers Workbench as follows:

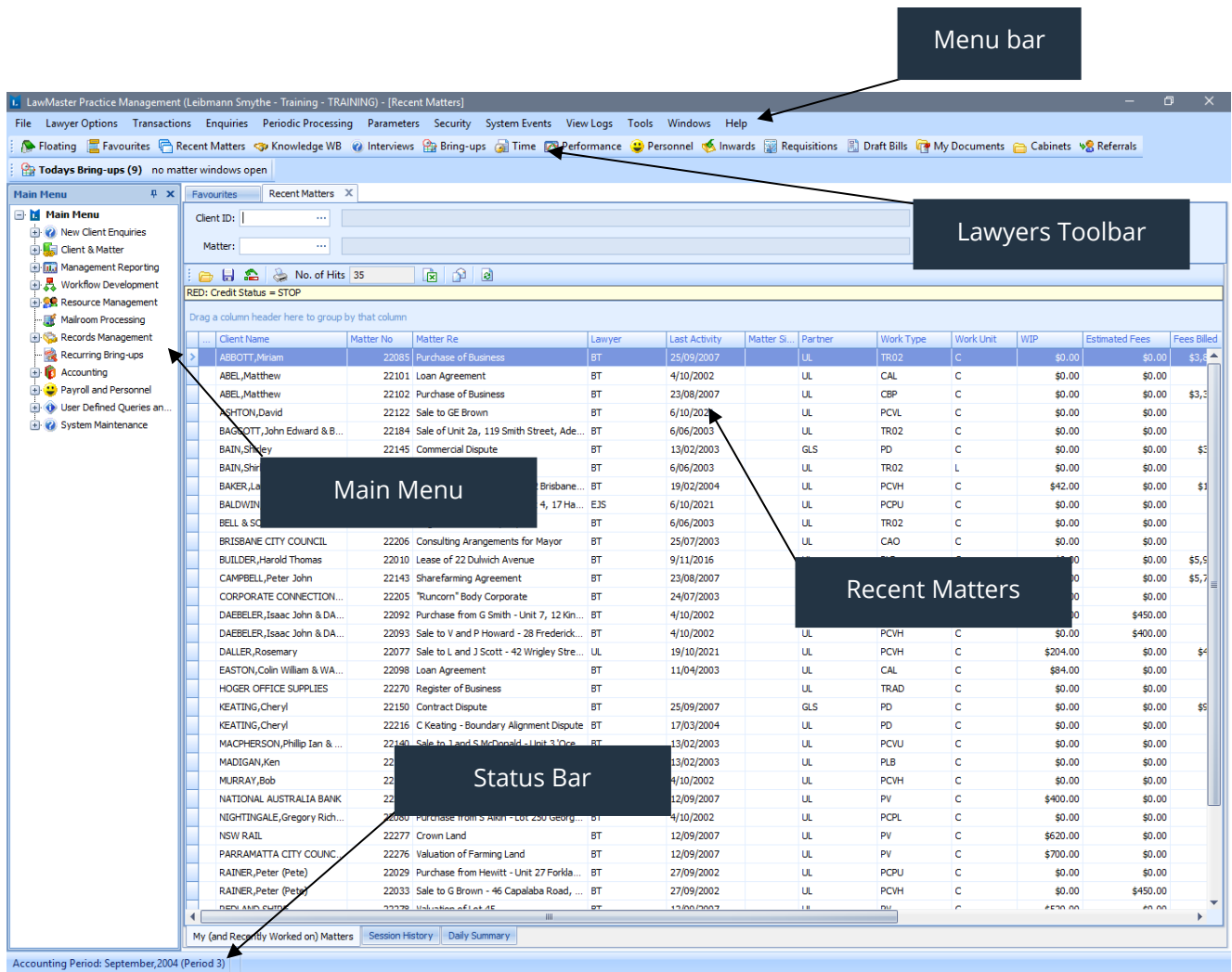


Figure 1

The Lawyers Workbench is made up of a Menu bar, Lawyers Toolbar, Main Menu, Status bar and the Recent Matters screen.

The Recent Matters screen provides a list of matters based on the following criteria:

- ❖ My and Recently Worked on Matters – shows all matters opened in the name of the logged on user, together with any matters which they have worked on (i.e. recorded time or saved a file note) within the last 10 calendar days.
- ❖ Recently Worked on Matters – shows all matters worked on within the last 10 calendar days only.
- ❖ Work Unit & Recently Worked on Matters – shows all matters opened for the logged on user’s Work Unit, together with any matters they have worked on within the last 10 calendar days.

## Help Files

All LawMaster help files can be accessed from the Menu bar. Click **Help**, this will provide you with a drop-down menu. From this menu click **System Overview**.

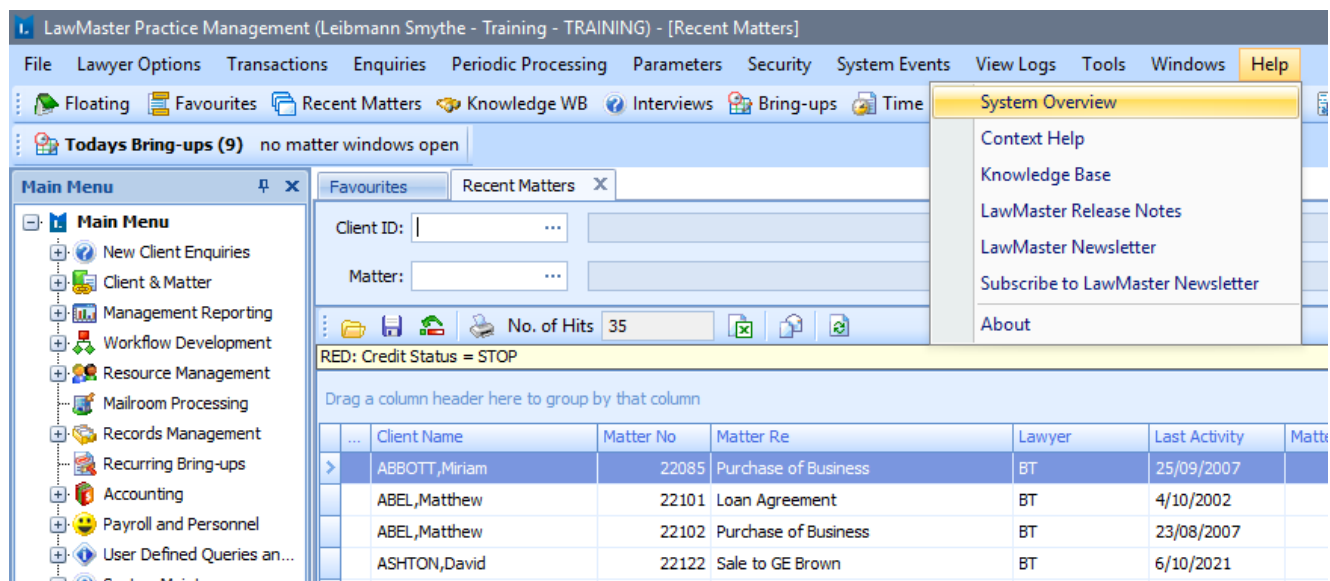


Figure 2

System Overview will take you to the LawMaster help files. This is where you can search all areas of LawMaster either via the tree menu on the Contents tab or by entering a ‘words in text’ search via the Search tab.

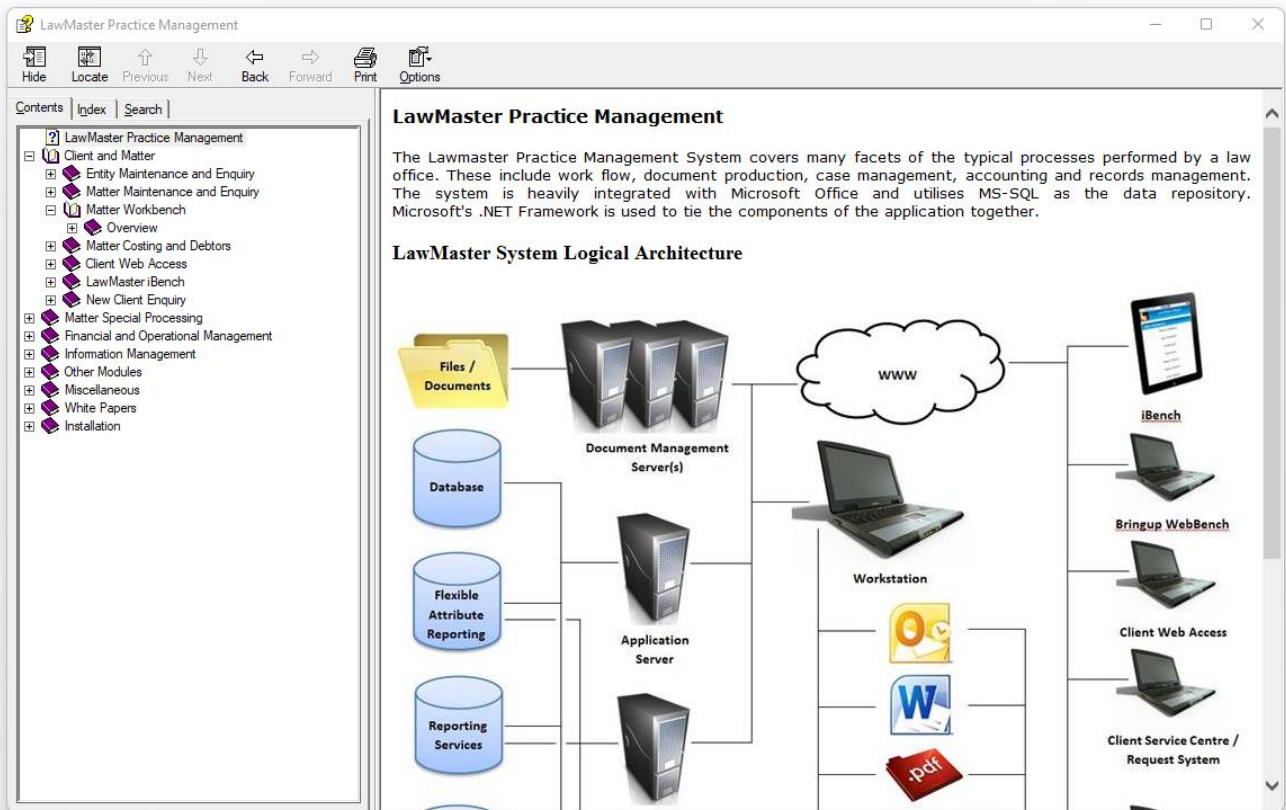


Figure 3

In addition, Click **Knowledge Base** to view the online suite of articles which provide useful 'how to' guides.

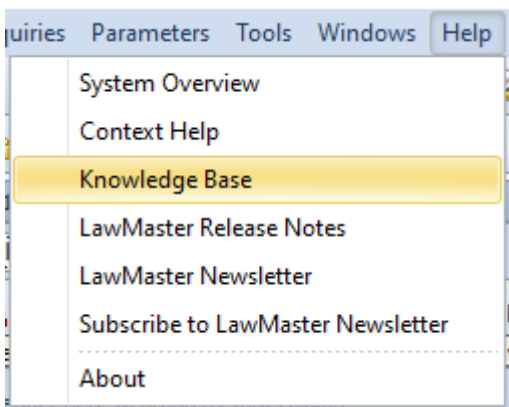


Figure 4

You will be presented with the Knowledge Base site [Support](#): You can then search via the menu on the left hand side or by entering key words as highlighted below.

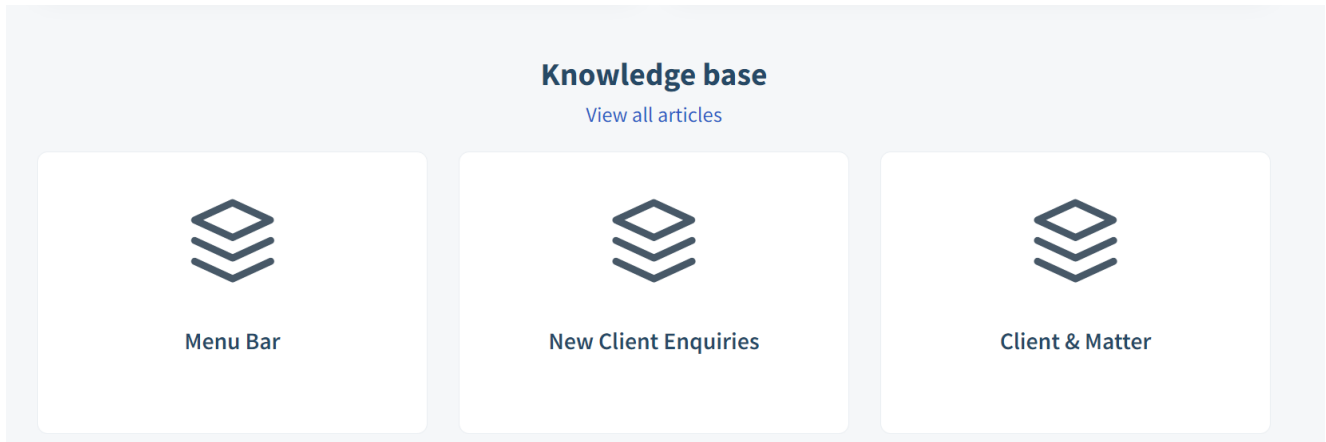


Figure 5

## LawMaster Client Service Centre – Client Help Desk

If after reviewing the help files you still require assistance from LawMaster, please log a support issue via our Client Help Desk Portal. This is available from the [link Submit a ticket](#) :

The screenshot shows the 'Submit a ticket' page on the LawMaster Client Service Centre. At the top left is the LawMaster logo with the tagline 'An Actionstep Company'. To the right are navigation links: 'Home', 'Knowledge base', 'Submit a ticket', 'Login', and 'Sign up'. Below the navigation is a search bar with the placeholder text 'Enter the search term here...'. The main heading of the page is 'Submit a ticket'. The form contains the following fields:

- Your Email Address \***: A text input field.
- I need to... \***: A dropdown menu with 'Choose...' selected.
- Subject \***: A text input field.
- How can we help you today? \***: A text input field.
















Figure 6





The LawMaster Client Help Desk is used for 'how to' questions, program enhancements and fault reporting. It is important that you include as much detail as possible to assist LawMaster in helping you. You must be an authorised Request Contact to be able to log a support issue with your username being your email address. If this is the first time you have logged into the Client Help Desk, you will need to select Forgotten Password, of which you will then be sent a link to set your password.

## Navigation

As seen in earlier, the **Menu bar** at the top of the screen is made up of a number of items displaying lists of commands for use throughout the system. Some of the commands may have images next to them so you can quickly associate the command with the image.

The **Lawyers Toolbar** is located beneath the Menu bar and contains buttons with images for frequently used, lawyer based functionality such as:

Toolbar Button	Function
 Floating	For making notes in relation to documents being drafted and for saving documents, emails, spreadsheets and power point presentations to LawMaster.
 Favourites	Allows the user to select their own favourite items to which they can easily navigate. These items can also be set to run automatically when logging into LawMaster.
 Recent Matters	Provides a list of 'my and recent matters' for the logged on author.
 Knowledge WB	Facility to search various text words over a specified date range on the following areas – Matters, Deeds, Folios, Within Documents, Clients, Library Catalogue, Document Templates & Web.
 Diary	Connects directly to the logged on users Microsoft Outlook Calendar.
 Bring-ups	Facility to record and review bring-ups for each user.
 Time	Allows users to review cost transactions entered for specified date range.
 Performance	Provides author performance information.
 My Contacts	Provides the user with the ability to create their own contact list similar to Outlook.
 Personnel	Provides payroll information for the logged on user, provided their details have been entered into the payroll system.
 Inwards	Any correspondence scanned into the system and allocated to the logged on user can be reviewed here.
 Requisitions	Allows users to enter requisitions for trust or general cheques.
 Draft Bills	Allows users to review draft bills and release for bulk billing.
 File Notes	This module provides the facility to print file notes for a given work unit range, author range and date range.
 My Reports	This module allows you to run reports on selected items as required.

 My Documents	<p>This feature allows users to Search for documents in the Document Management System based on checked out documents, recent documents and finalised documents.</p>
 Cabinets	<p>This module allows users to search and view Cabinets.</p>
 Referrals	<p>This module allows users to review Referrals using various search criteria. Folio attachments and Cabinets may be referred to another user within LawMaster.</p>
 Client Service Centre	<p>This provides access to the LawMaster Members Area, where you can view training videos, request system and contact details.</p>

The **Main Menu** is located on the left-hand side of the screen. This is a tree view menu where system applications can be accessed.

The firm must be authorised for a particular application and the user must have security rights to that application in order for it to appear in one of these three menus.

A Status bar is located at the bottom of the window to provide information about the current state of the system any other contextual information. For example, if a matter is added a message will be displayed in the status bar advising of this. The current accounting period is also displayed on the status bar.

## Grids

Grids make up a large part LawMaster. They allow for extensive functionality to sort, filter and output data. Grids can be identified by their columns and rows much like an Excel spreadsheet.

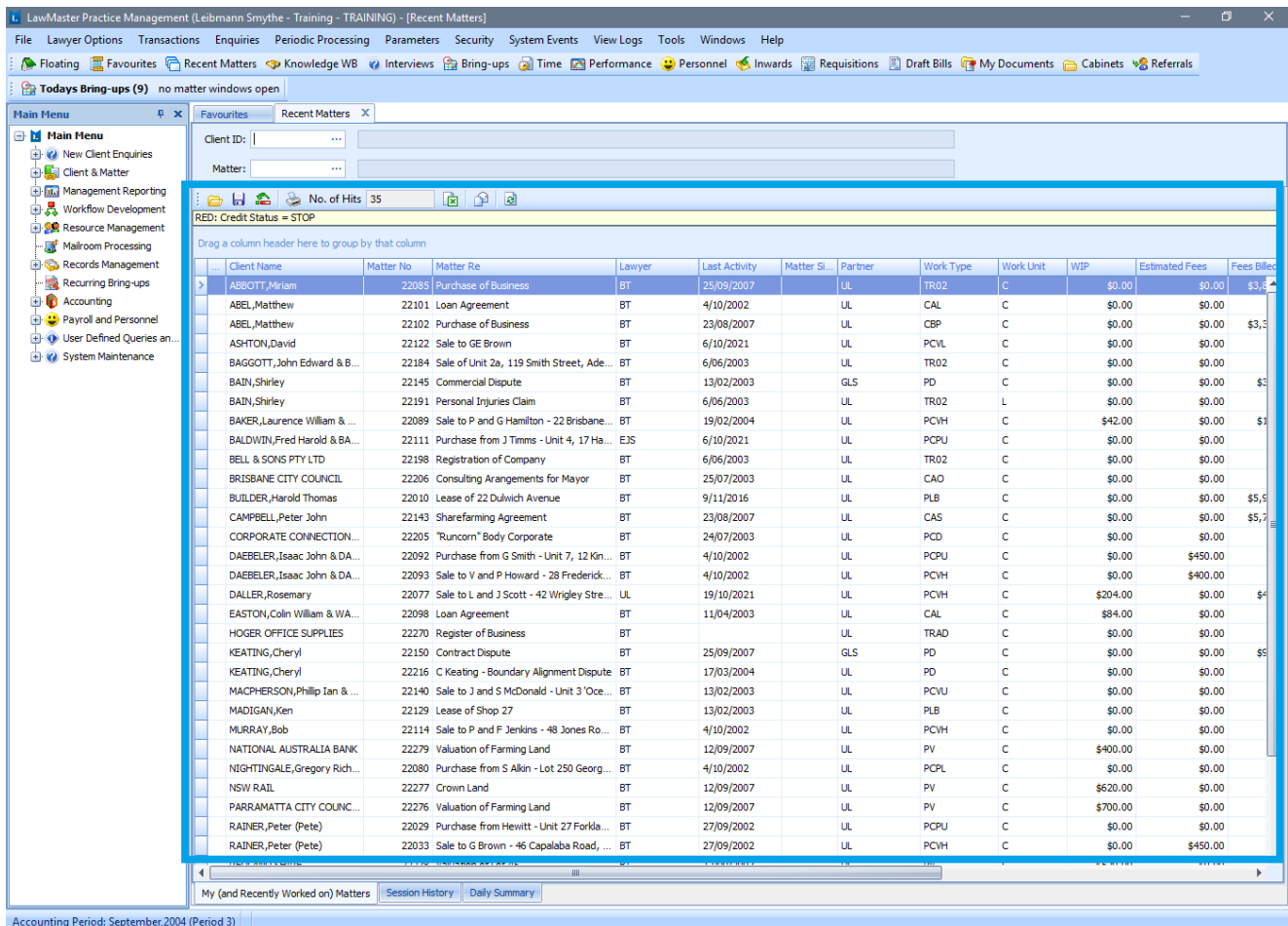


Figure 7

Features common to all grids include:

- ❖ **Sorting** – Click in column heading to sort in ascending or descending order. This option is also available from the **Grid Menu** by right clicking the column heading. See Figure 8.
- ❖ **Grouping** – Drag header into the **Group panel** to group by that column. Drag the header panel back to the grid to ungroup. Grouping can also be achieved through the **Grid Menu**.
- ❖ **Re-sizing** – Columns may be resized by dragging the double arrows between columns. Row height may be resized by dragging the double arrow between rows. 'Best Fit' options are also available in the **Grid Menu** to resize the columns.
- ❖ **Filtering** – Access through the key icon in the column heading.

- Custom – Displays a dialogue box where appropriate criteria can be selected.
- ❖ **Column Chooser** – This function is available from the Grid menu only and allows columns to be removed from the grid. Upon exiting the grid and re-entering, default settings will be returned. **Please note:** Columns can also be removed by dragging the column heading directly off the screen. The Column Chooser allows you to drag and drop columns to customise your layout.

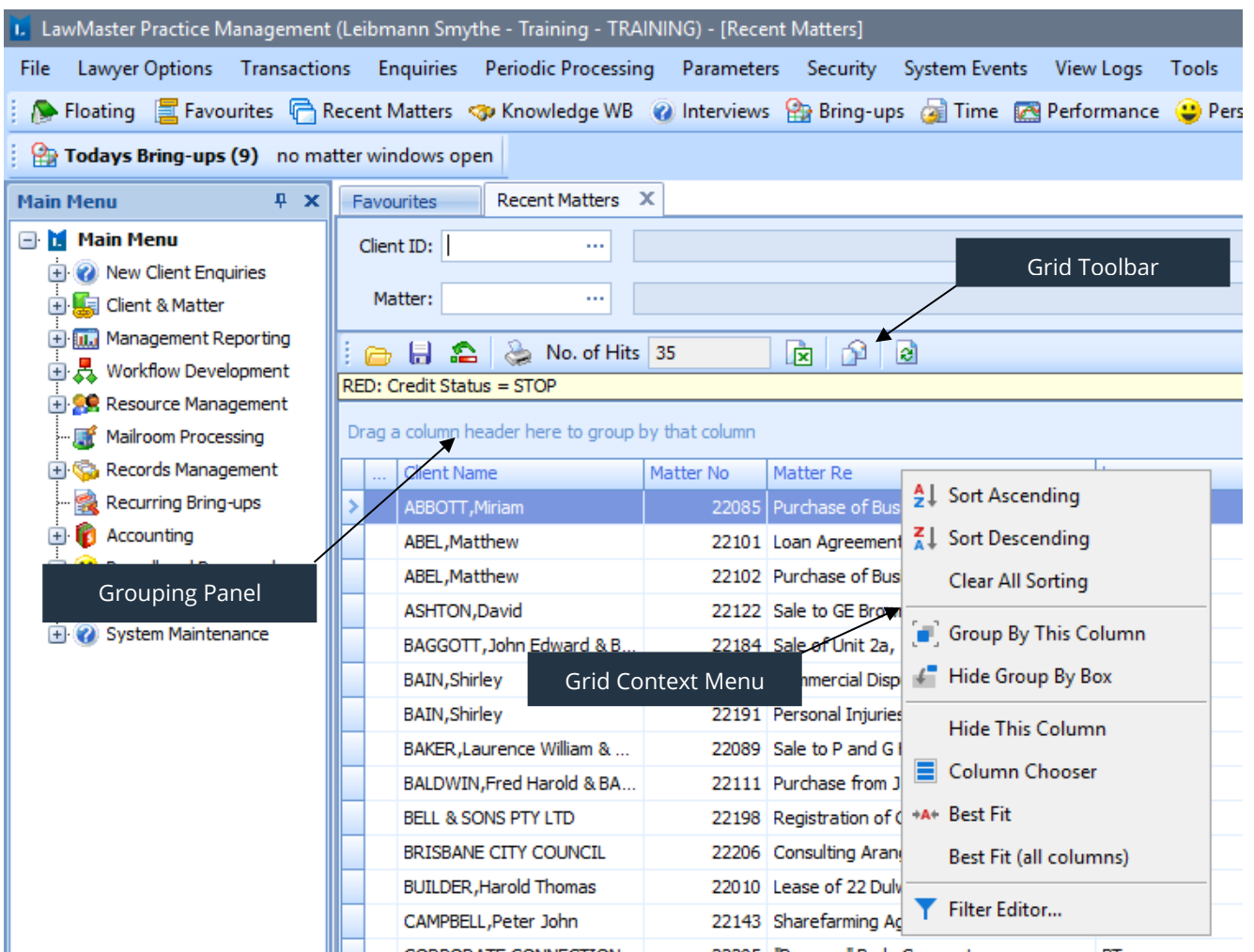



Figure 8

From the Grid Toolbar the following functions may be performed:

- ❖ **Save Layout** – After customising the grid, Click  to save the template to a local file. Numerous layouts can be saved.
- ❖ **Load Layout** – This will load a saved layout.

- ❖  **Restore to Default** – This will restore the default system grid view.
- ❖  **Print** – This will print the grid as displayed.
- ❖ **Max Records & No. Hits** – This displays the number of items in the grid and the maximum number of items being displayed. Not all grids will include a Max Records item.
- ❖  **Export to Excel** – Exports the contents of the grid into Microsoft Excel. Only the base rows are exported i.e. any grouping will not be exported.
- ❖  **Refresh** - A refresh button is provided to enable the query to be refreshed i.e. the data is retrieved from the database again.
- ❖  **Export and Email** – On selected grids you may export the contents of the grid to Excel and email. This option will take you to an email message and the exported grid will be an attachment to the email.
- ❖  **Send Query** – In selected cases, the contents of the grid, when querying entity, matter, resource or employee related data may be exported in their original enquiry screen so that all of the standard functionality becomes available
- ❖  - Change horizontal / vertical split – On Folio grid screens with a Preview tab, this enables the screen to be split either vertically or horizontally. When the Folio Screen is split horizontally, the Preview Pane (and other tabs) will be in the bottom section of the screen. When split vertically, the Preview Pane will be in the right hand side of the Folio Screen. Any change you make to the orientation of the Preview Pane will be remembered and applied to the next time you open a Folio grid screen with a Preview.
- ❖ **Grand Totals** - Where a grid has a total bar e.g. voucher enquiry right clicking on the total bar below the relevant column will bring up the following pop up menu. The user can choose from sum, minimum value, maximum value, and average. A count of the number of rows may also be displayed.

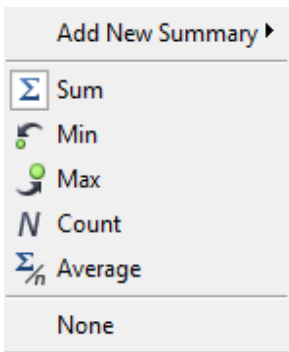



Figure 9

## Entity Search

It is possible to search for Entities in a number of different ways.

Option One: From the Recent Matter screen, type the client name in the Client ID field and Click the  icon.

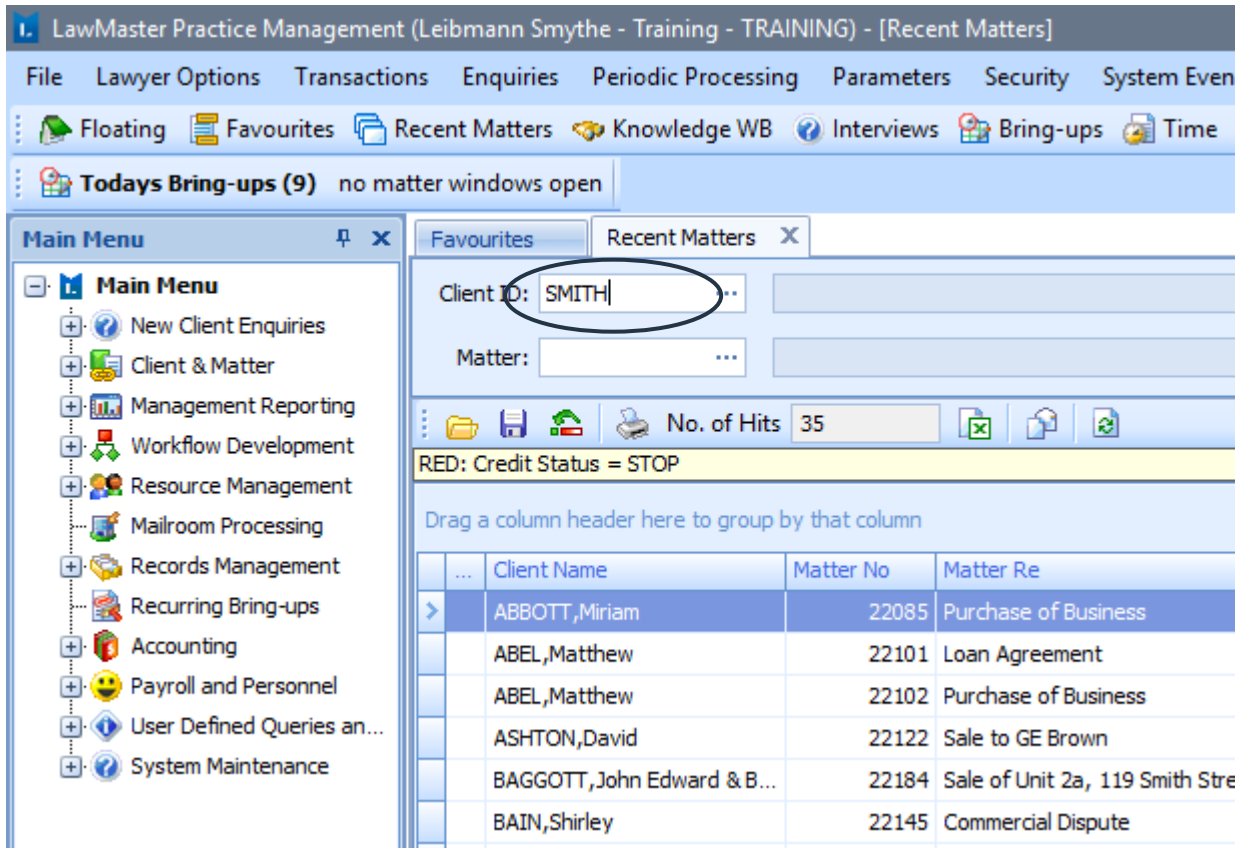


Figure 10

This will then present the **Entity and Matter Search** screen listing all entities in LawMaster with the details you entered. The entities and there basic details e.g. address and contact numbers will be listed on the left of the screen while any matters for the selected entity is listed on the right of the screen.

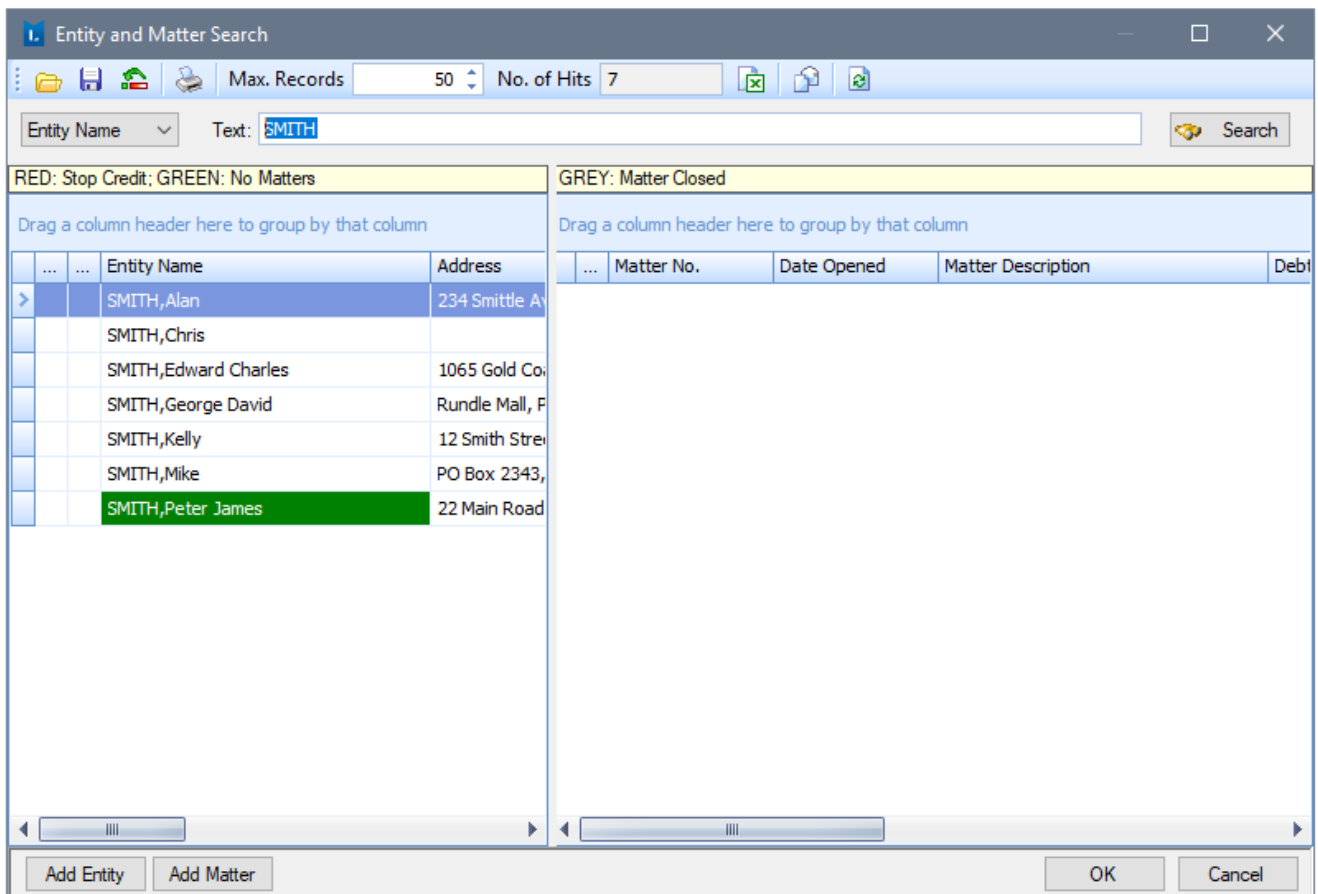


Figure 11

For full details on the **Entity and Matter Search** screen please see below.

Option Two: Entities can also be accessed from the Menu bar. [Click Enquiries → Entity Search.](#)

This will display the Entity Search screen. On this screen there is a **Search By** drop down box which lists the available search options. [Choose an option and Click Search.](#)

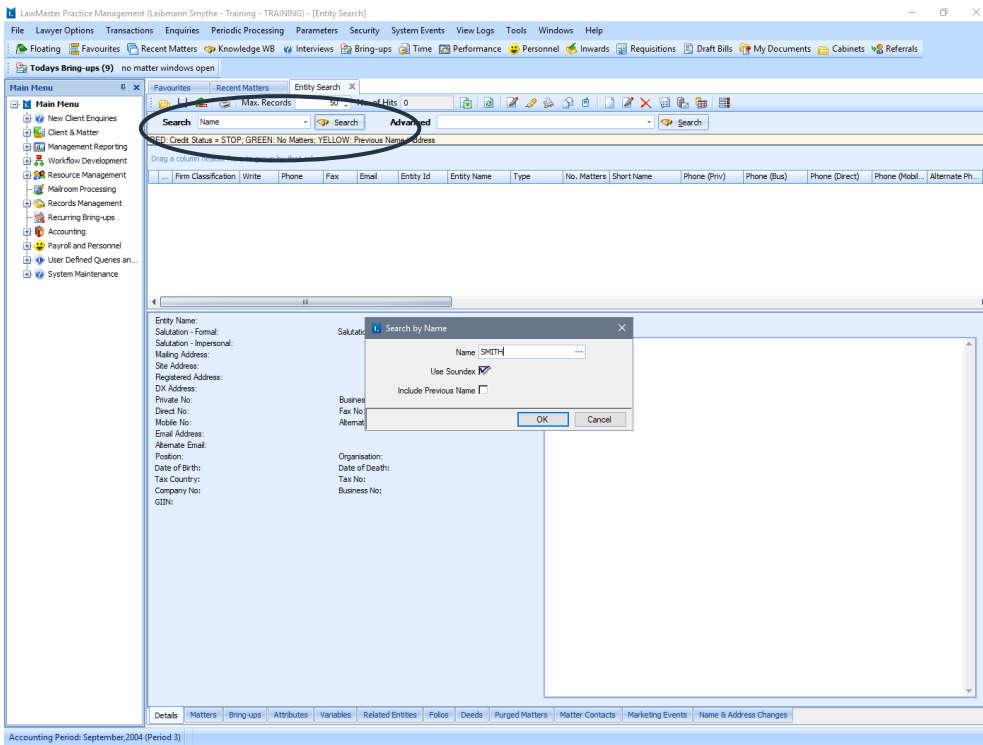


Figure 12

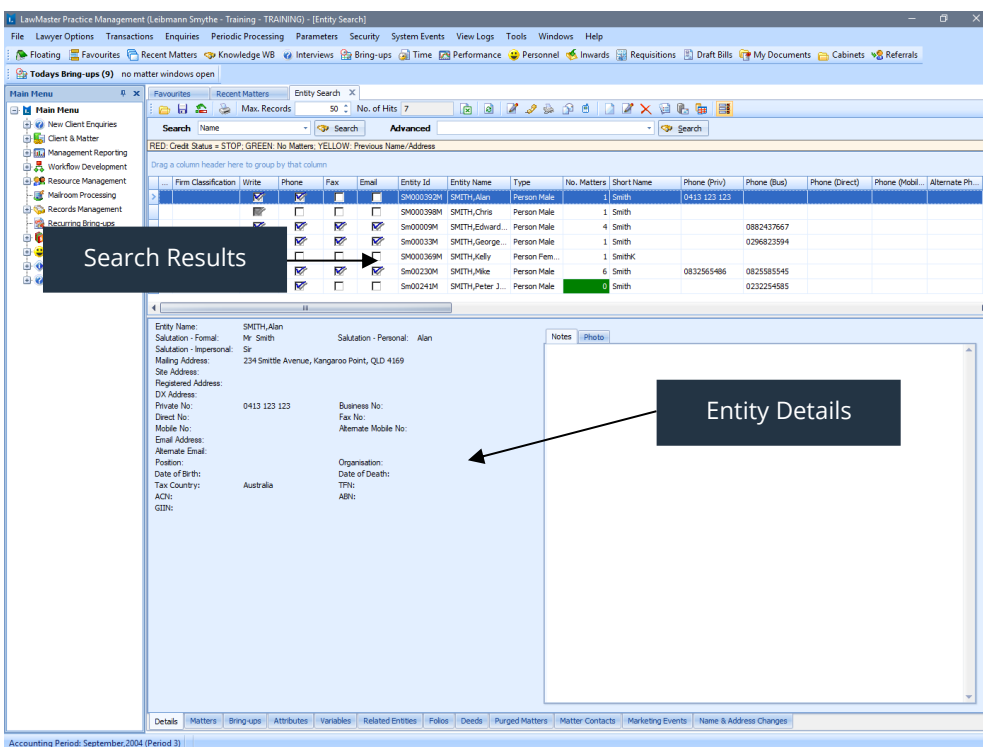



Figure 13

The search results are displayed in the top half of the grid, whilst the details of the highlighted entity are displayed in the bottom half.

# Matter Search

As with entities, it is possible to search for Matters in a number of different ways.

Option One: From the Recent Matters screen type part of the matter description into the Matter field and Click the  icon.

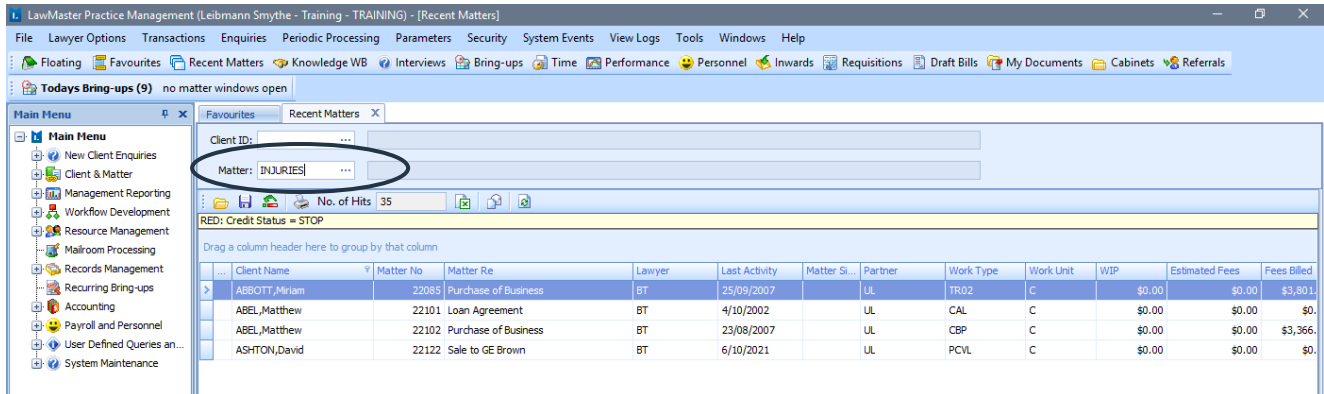


Figure 14

This will then present the Entity and Matter Search screen with a list of all matters that contain the text entered on the right side of the screen. When you select one of the matters the corresponding entity details will be displayed on the left side of the screen.

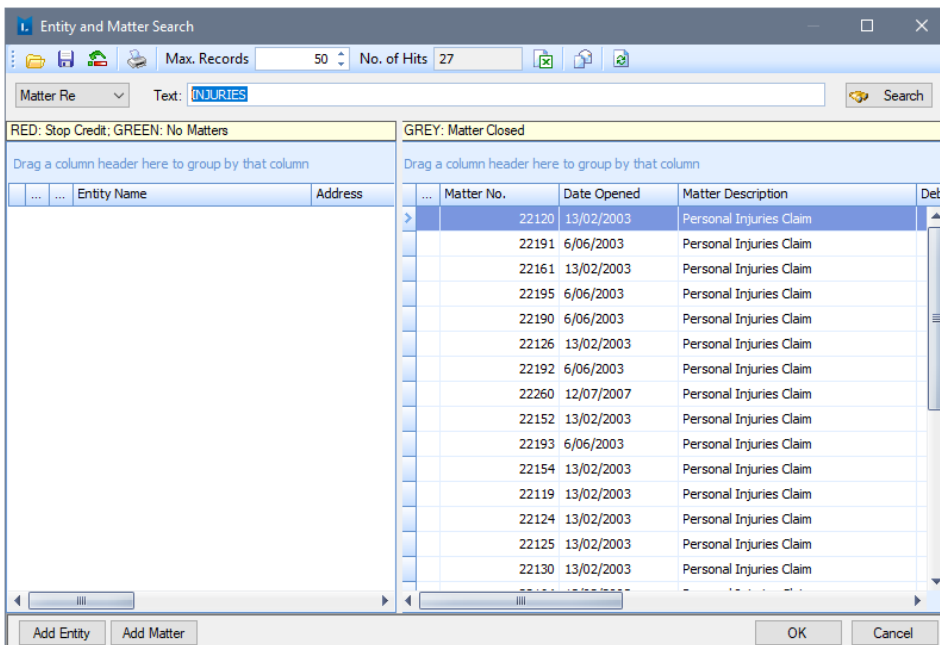



Figure 15

**Double Click** or **Click OK** to open the matter in Lawyers Workbench.

Option Two: From the Recent Matters screen type the matter number directly in to the Matter field and Click the  icon.

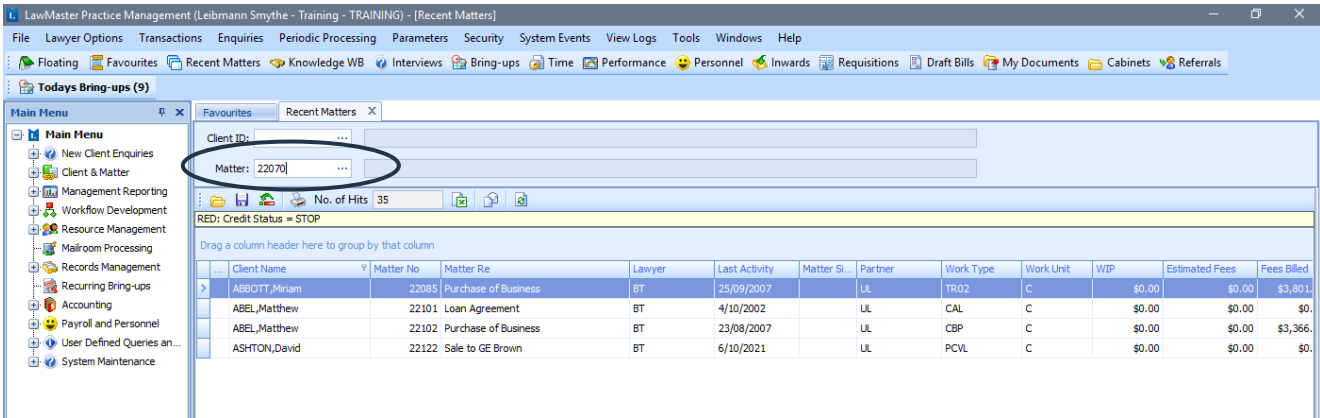


Figure 16

Option Three: From the Recent Matters screen select a matter from the Grid and **Click Open** from the Context Menu OR **Double Click** matter in the Grid.

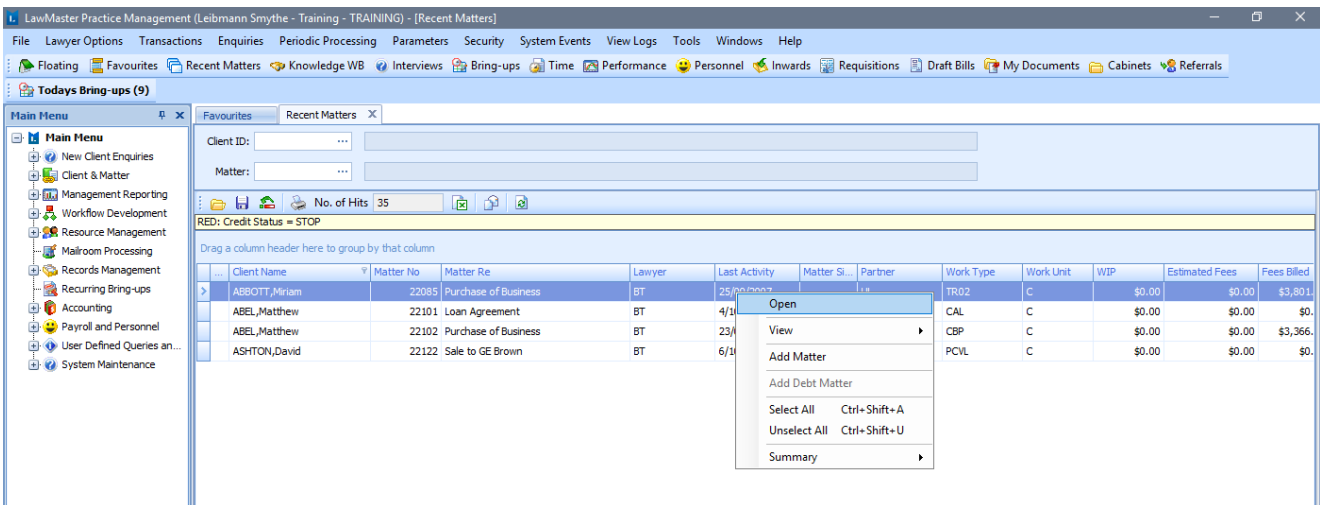


Figure 17

Option Four: From the Menu bar Click **Enquiries → Matter Search**.

This will display the Matter Search screen. On this screen there is a **Search By** drop down box which lists the available search options. Choose an option and Click **Search**.

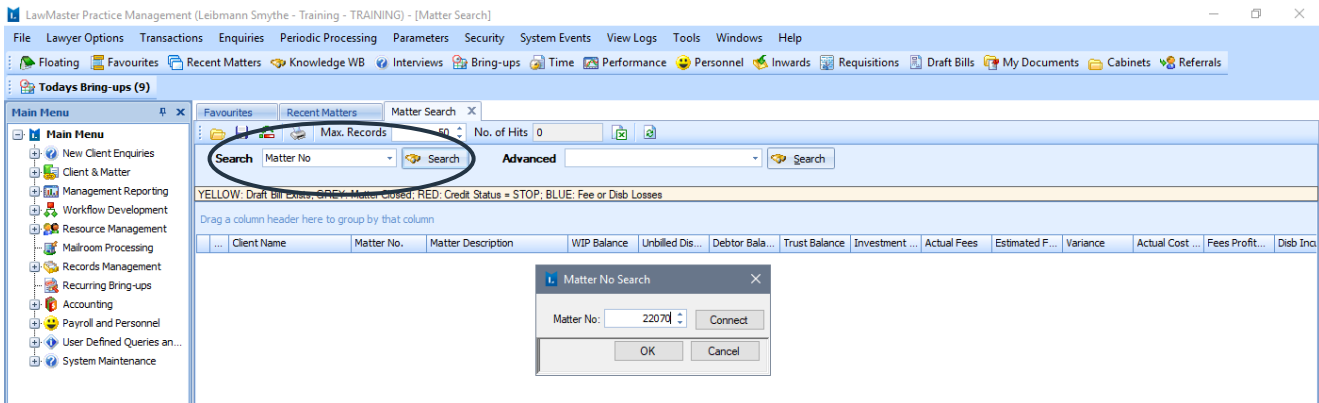





Figure 18

## Entity and Matter Search

The Entity & Matter search screen mentioned above allows entity and matter queries. This search screen can be accessed from any field requiring entity or matter details to be entered and where the  icon is provided. A number of examples include:

- ❖ Lawyers Toolbar → Recent Matters – both the Client and Matter fields in this screen contain the  lookup icon which will invoke the Entity and Matter Search screen.
- ❖ Main Menu → Accounting → Accounts Payable → Input Vouchers – the Entity field in this screen contains the  icon which invokes the search screen allowing users to select the payee's entity details.

In fact any transaction input module where it is necessary to search for either a matter number or entity identifier will provide access to the Entity and Matter Search screen.

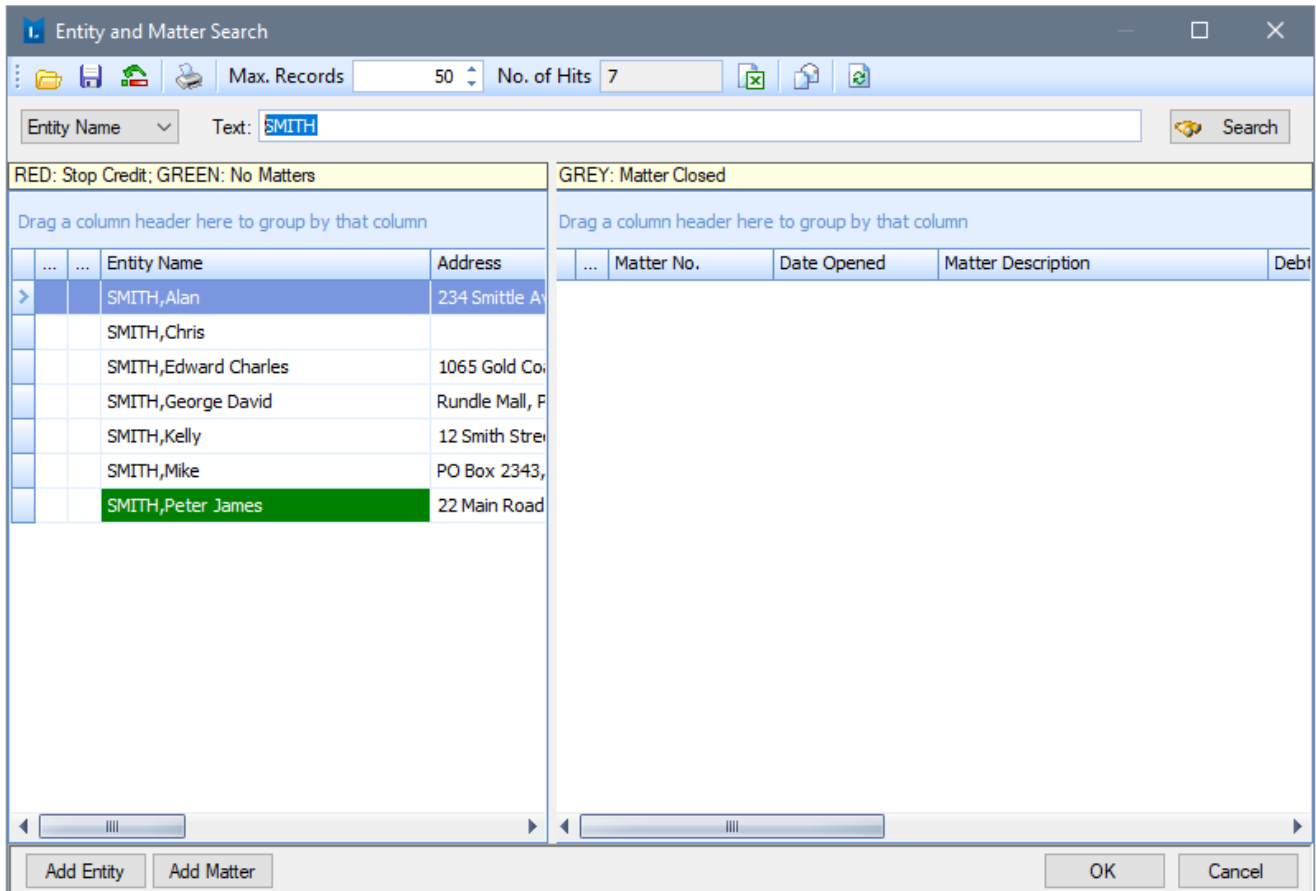


Figure 19

Search options available from this screen are:-

- ❖ Search by Entity Name: The user may enter a combination of words (or part of them) to search the entity name (including alias). LawMaster returns a list of entities satisfying the search criteria.
- ❖ Search by Entity Address: The user enters a combination of words (or part of them) to search the Street and Suburb fields as a 'words in text' search. The system returns a list of entities satisfying the search criteria. e.g. Queen Brisbane
- ❖ Search by Entity Identifier: The user enters an exact entity identifier and the system returns the entity with that Identifier. The user can also enter the first a number of characters only and the system will return a list of entities whose entity identifiers *begin* with the value entered.
- ❖ Search by Matter: The user enters a combination of words (or part of them) to search the matter description field as a 'words in text' search. Only current matters (within user access rights) are returned.

The user must press the ENTER key or the search button to invoke the relevant search. Where the user selects an entity which has been returned, associated open matters (within user access rights) are displayed.

After selecting the relevant entity or matter and pressing either the OK button or the F2 key the relevant matter number or entity identifier searched will be entered into the field.

LawMaster also enables a matter or entity to be added from this screen by selecting the appropriate button at the bottom left of the screen.

## Matter Workbench

When a matter is opened a Matter Workbench screen is presented for that matter.

The Matter Workbench is made up of a Tree View Menu and Toolbar. As each toolbar application is opened an additional tab is provided.

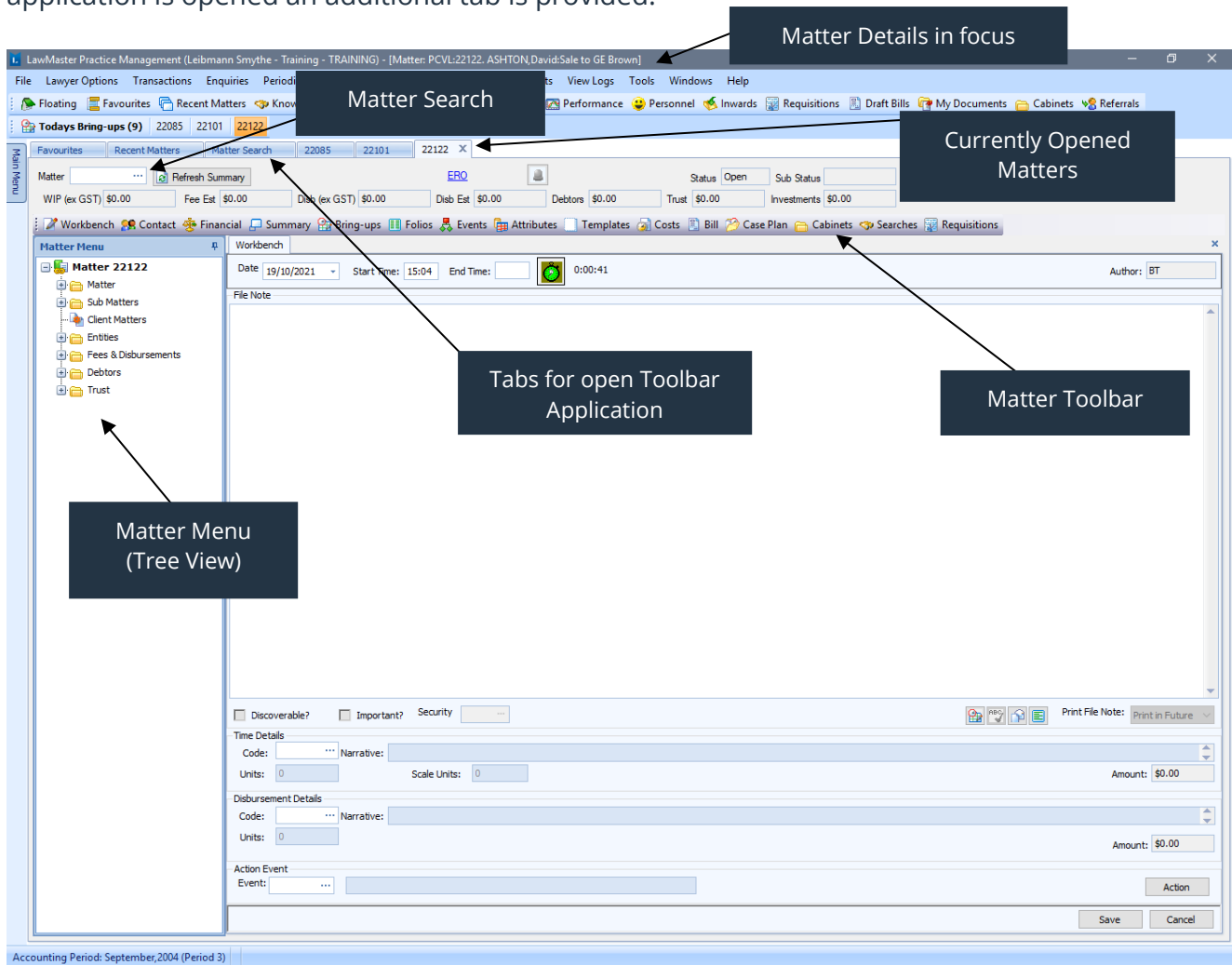


Figure 20

## Entering File Notes, Time and Disbursements

File notes, time and disbursements are entered from the Workbench tab in the Matter Workbench. This tab includes the following features:

- ❖ Time Clock updates dynamically – you can see the time ticking over.
- ❖ The Time Clock on a matter is stopped when focus is given to another matter. You can also manually stop the clock by clicking it. The clock icon is green when running and red when stopped.

- ❖ Start Time and End Time fields. This allows the user to enter the start and end times of a task and the system will automatically calculate the number of units and override any elapsed time displayed on the clock.
- ❖ Fields are only 'opened' when required. For example the Narrative, Units and Amount fields will stay greyed out until an Activity Code is entered into the Code field.
- ❖ Once saved, time entries cannot be deleted. If changes are required, users can Modify the Activity Code (Expense Type), Units, Amount and Narrative of a Time Record where the Cost Transaction is Unbilled and is not Reversed, Transferred or Split. The context menu can also be used to transfer the time entry to another matter if required

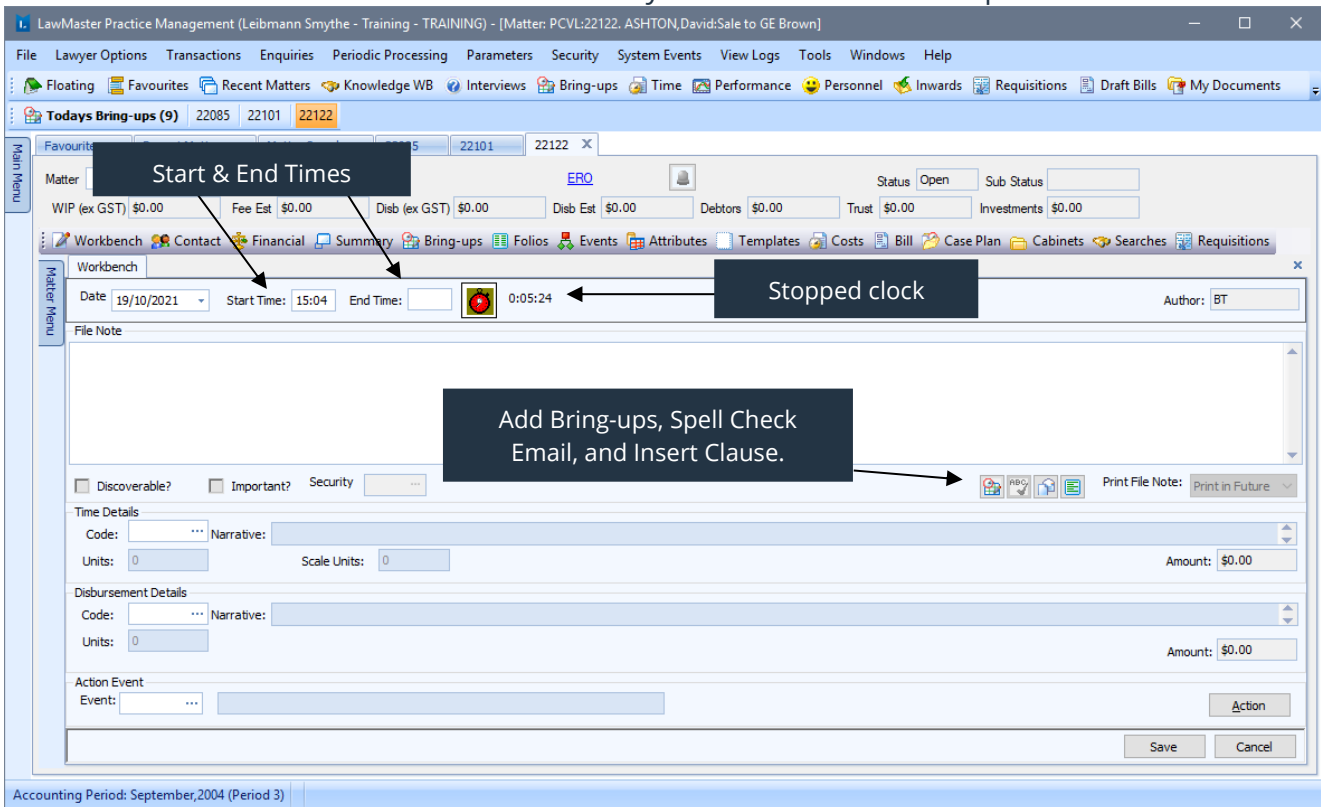


Figure 21

- ❖ File notes, time recording, and disbursement recording can be entered separately or simultaneously. The following details are required:

Ensure that the correct Date is displayed. If manually calculating the time spent, Start and End Times will need to be entered, alternatively the Clock can be used to calculate time spent.

## Correspondence

Letters, faxes and emails may be created from the **Matter Toolbar → Contacts** to access this functionality.

The Contacts screen displays details of all matter parties for the current matter in a grid. The grid has a Context Menu and icons on the grid toolbar where correspondence features can be accessed i.e.

- ❖ Write
- ❖ Phone
- ❖ Fax
- ❖ Email
- ❖ SMS

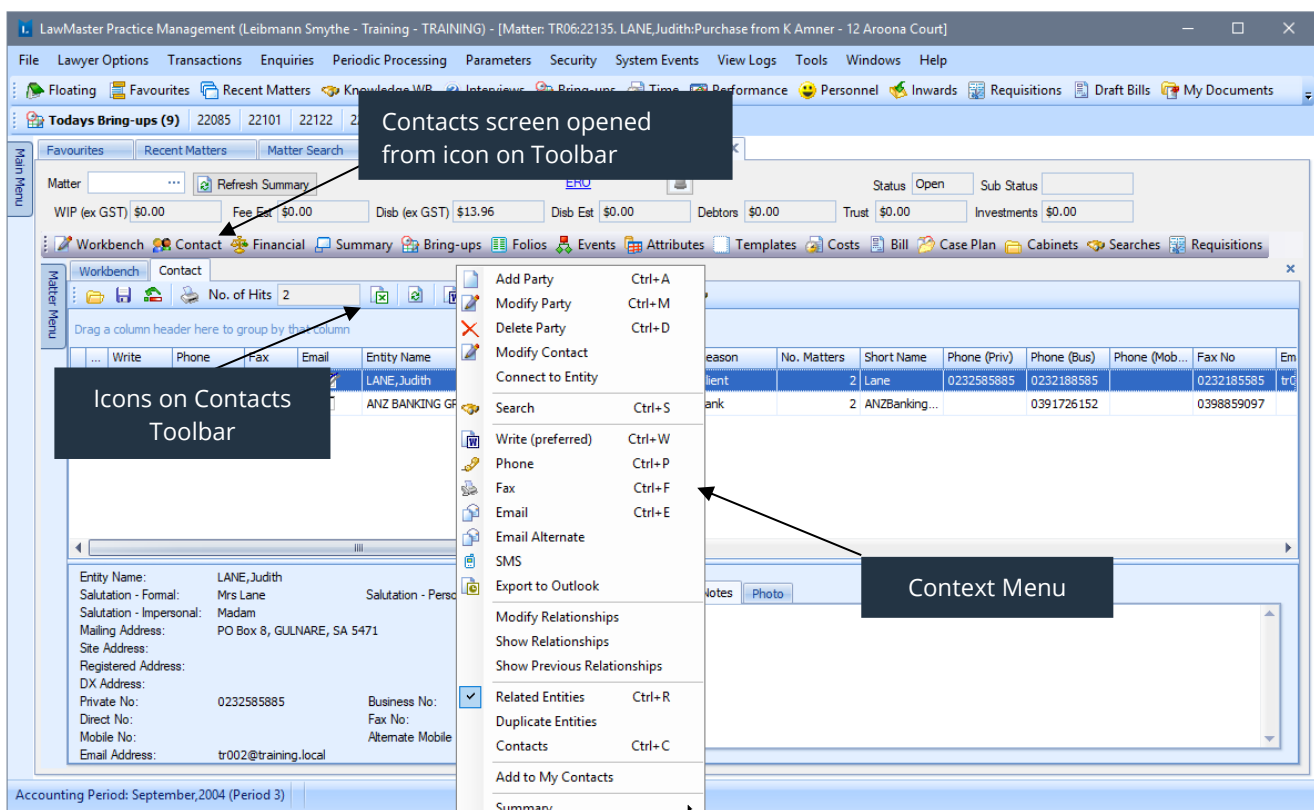


Figure 22

## Write a Letter

In order to write a letter to a matter party in the Contacts screen, they must have address details. If the matter party has a tick in the Write column in the grid, they have appropriate address details and a letter can be prepared. In order to write a letter:

- ❖ Click the party you wish to write to
- ❖ Right Click **Context Menu**
- ❖ Click **Write** this will present the **Write To** screen

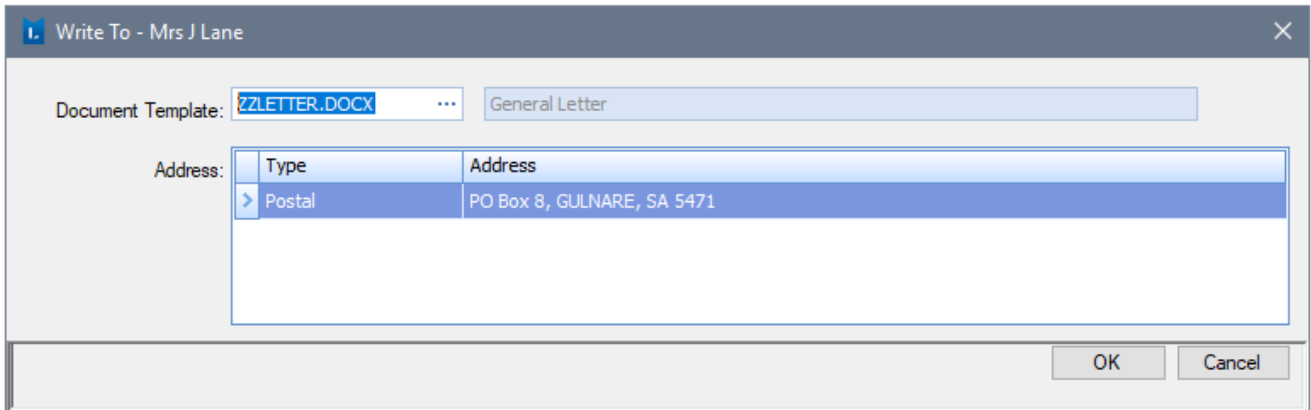


Figure 23

- ❖ The Document Template will default to zzletter.doc which will provide you with a blank letter addressed to the matter party you selected. If more than one address appears in the Address box, [click the address you wish to use](#) then **Click OK**.
- ❖ You will then be prompted to enter Your Reference. If applicable [type in the reference details for the addressee](#) OR if there is no reference [leave it blank](#). **Click OK**.

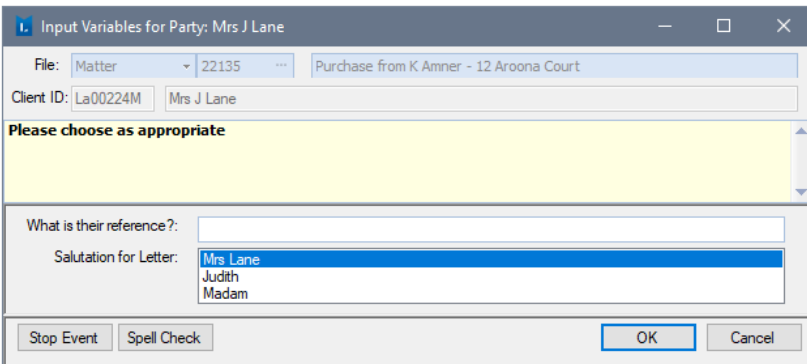


Figure 24

- ❖ If any other any other dialogue boxes appear asking for further information e.g. Salutation, enter the appropriate information and **Click OK**. When all information is entered the following **Add Folio** screen will appear.

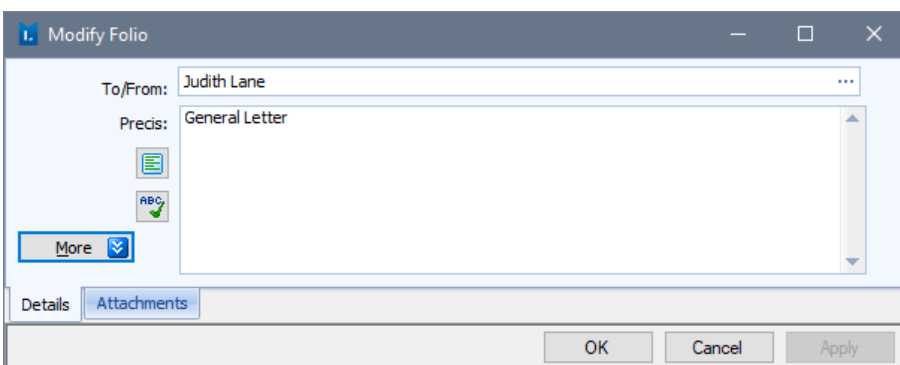


Figure 25

- ❖ The 'To/From' field will be automatically completed with the details of the matter party you selected. The Precis field will also contain automatic text, however you need to complete this. The Precis should uniquely identify the letter, do not leave it as "General Letter to.....", instead add further details e.g. "General Letter to ..... enclosing a copy of Contract". [Click OK](#). To view or amend further details regarding the document, [Click More](#).

Figure 26

- ❖ **After clicking OK, the letter will be merged into Microsoft Word and saved as a Folio in LawMaster.**
- ❖ Complete the body of your letter in Word, save, print and close in Word.

## Write a Fax

As with writing letters a matter party in the Contacts screen must have a tick in the Fax column in the grid in order for a fax to be created. To write a fax:

- ❖ Click the party you wish to fax
- ❖ Right Click **Context Menu**
- ❖ Click **Fax** to see the **Fax To** screen, enabling you to select the fax number to send it to.
- ❖ The Document Template will default to zxfax.doc which will provide you with a blank fax addressed to the matter party you selected. Select fax number and Click **OK**.
- ❖ You will then be prompted to enter details of whose attention the fax is for and the number of pages the fax will be. If applicable **type in the details** OR **leave it blank**. Click **OK**.
- ❖ Next the **Add Folio** screen will appear as it did when merging a letter.
- ❖ Ensure the matter party's details are entered in the To/From field and the Precis uniquely identifies the fax. **Click OK**. To view or amend further details regarding the document, **Click More**.

## Add Matter Party

Additional matter parties can be added in the Contacts grid. **Right Click Context Menu → Click Add Matter Party.**

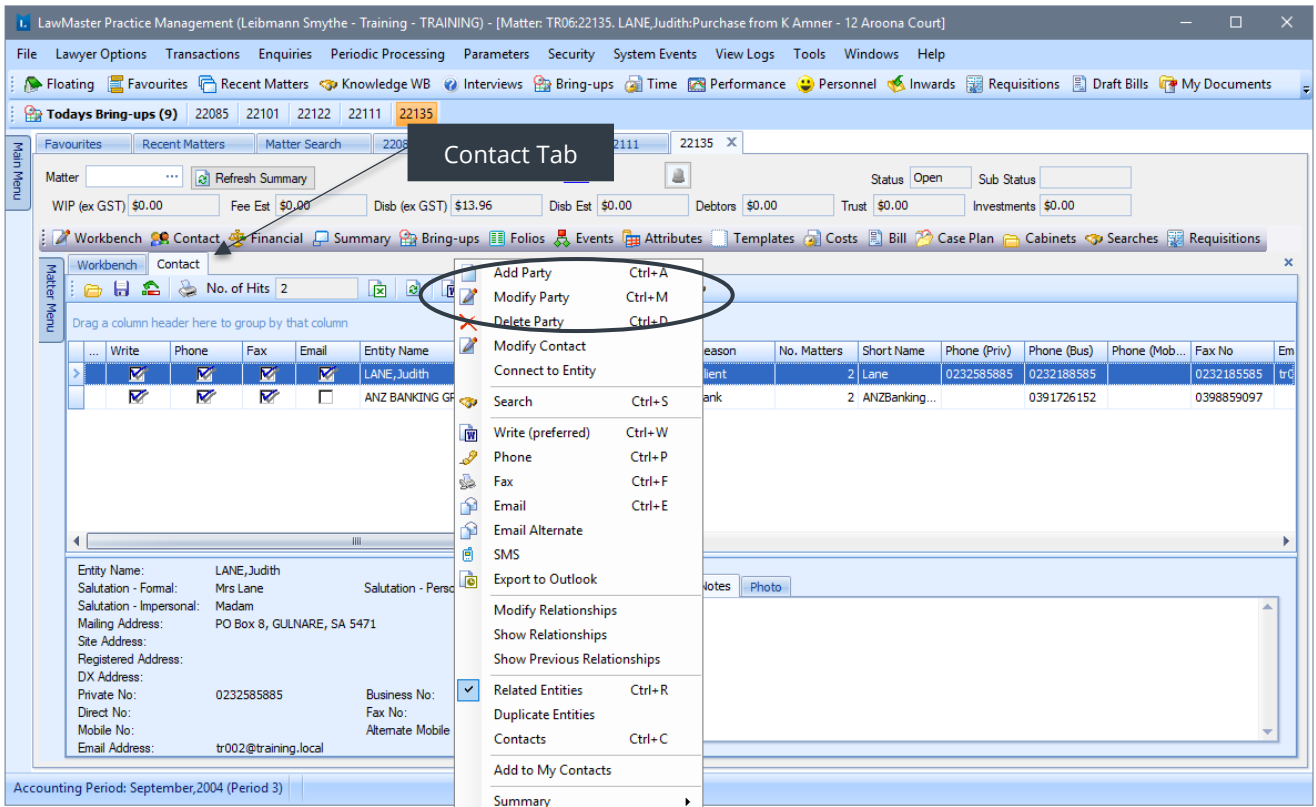


Figure 27

This will present the **Add Matter Party** Screen

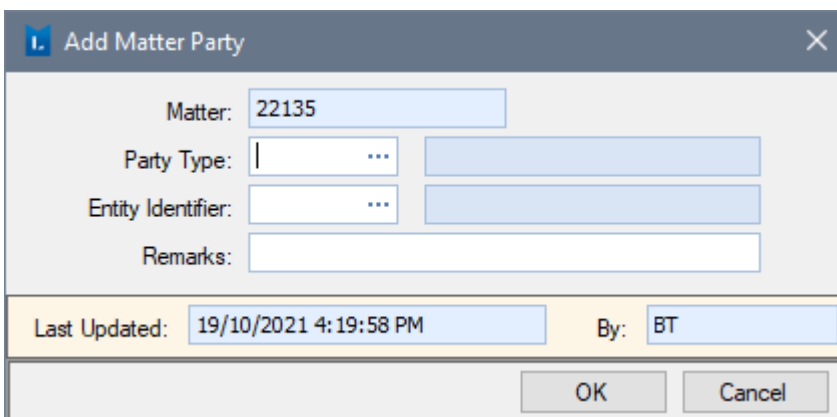


Figure 28

To add a new matter party:

- ❖ In the Party Type field, [Click the !\[\]\(6e19c8fcd8dfbfe55e8ab80958cb16da\_img.jpg\) icon](#). From the list provided, select the appropriate Party Type.
- ❖ In the Entity Identifier field, [Click the !\[\]\(6ab916a4664a7e84fe28d6d8b105da90\_img.jpg\) icon](#). This will provide the Entity and Matter Search screen where you can search for the Entity to be added as a matter party.
- ❖ In the Remarks field, enter any remarks relevant to the party being added.
- ❖ [Click OK](#).

## Phone

LawMaster supports TAPI, a desktop dialing system, which will allow you to call a matter party direct from the Contacts grid. A matter party in the Contacts screen must have a tick in the Phone column in the grid in order to utilise this feature. If you do not have the TAPI desktop dialing system:

- ❖ [Click](#) the party you wish to call
- ❖ [Right Click Context Menu](#)
- ❖ [Click Phone](#) – this will present the **Select Phone No** screen

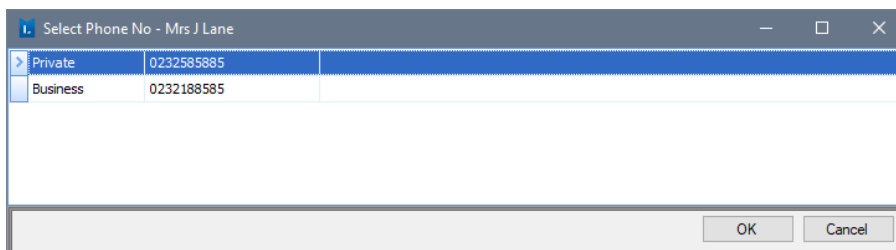


Figure 29

This will display a list of phone numbers for the selected party.

## Sending Emails

As mentioned in the File Notes section of this document, file notes can be emailed directly from the Workbench screen. Emails can also be sent from the **Contacts** tab in the Matter Workbench.

From the Contacts tab you can email any party with a tick in the email column.

- ❖ Click the party you wish to email
- ❖ Right Click **Context Menu**
- ❖ Click **Email** – this will present Outlook Send Email screen. You are then able to use all normal Outlook functions; as well as the LawMaster Ribbon.

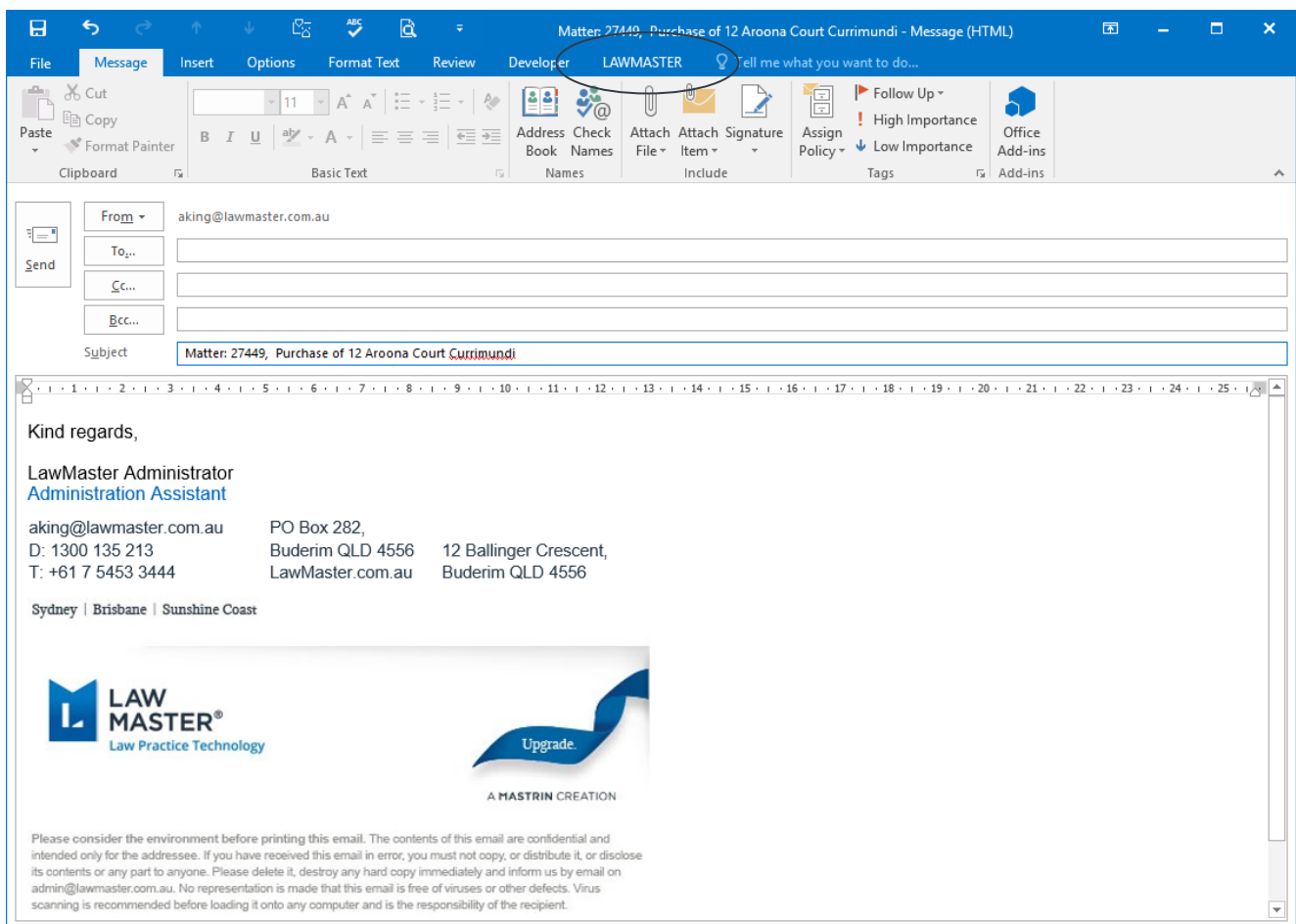


Figure 30

The email address for the matter party that was selected will automatically appear. To change the email address, or to add additional email address you can now use your normal Outlook contacts OR by selecting the LawMaster tab, you can then choose the Address Book field. The Select E-mail Address screen will be presented, where you can choose the appropriate recipient list e.g. Contacts, Users, Distribution Lists etc. from the 'Show recipients for' drop down box.

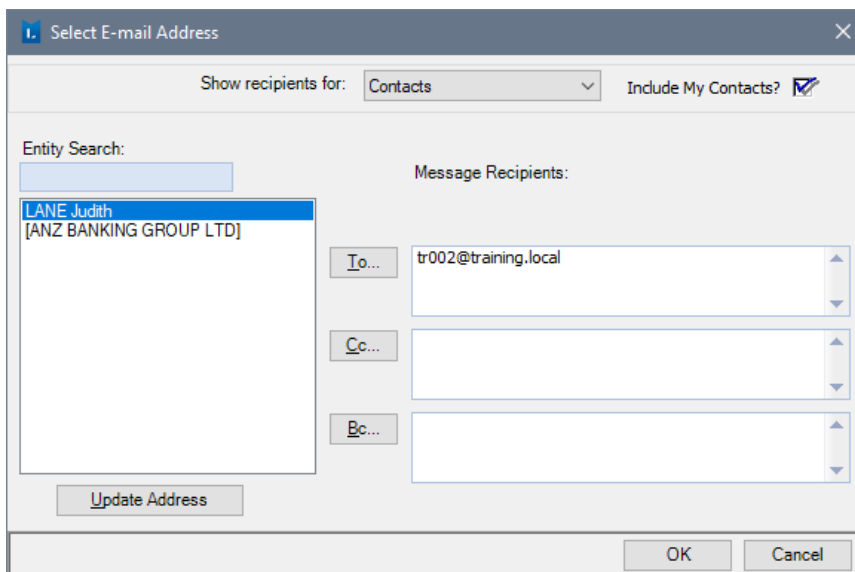


Figure 31

- ❖ A list of names will then be displayed on the left hand side of the screen. Choose the appropriate name and Click **To** button on the right of the screen. The email address of the selected recipient will then be displayed in the 'To' field. Addresses may also be entered for the 'From', 'CC' and 'BC' fields whilst in this screen. When all changes have been made Click **OK** to save the changes to the Email screen.
- ❖ The 'Subject' of the email will default to the matter details unless otherwise specified. This can be manually amended.
- ❖ The LawMaster tab has a number of additional functions which include:
  - Create Folio – If ticked will make a file note of this email in the Folios screen.
  - Discoverable – If ticked, marks the folio as discoverable in the Folios grid.
  - Important – If ticked, marks the folio as important in the Folios grid.
  - File Indicator – Depending on where you are sending the email from e.g. Matter or Entity
  - File Number – The matter number if sending the email from a matter.
  - Add Bringups – Allows you to add a bring up for the matter.
  - Insert Clause – Allows you to insert a standard clause that has been created.
  - Insert Variable – Allows you to insert a variable from a standard template.
  - Process MTM – If you select a variable, LawMaster will process that variable with the attribute data. If you want to send sample coding in an email, uncheck this box.

- ❖ If you want to attach a document to your email, you will need to **click the Folio Attachments tab and Click Add**. This will present the Folio screen. Select the required attachments and **Select Ok**.

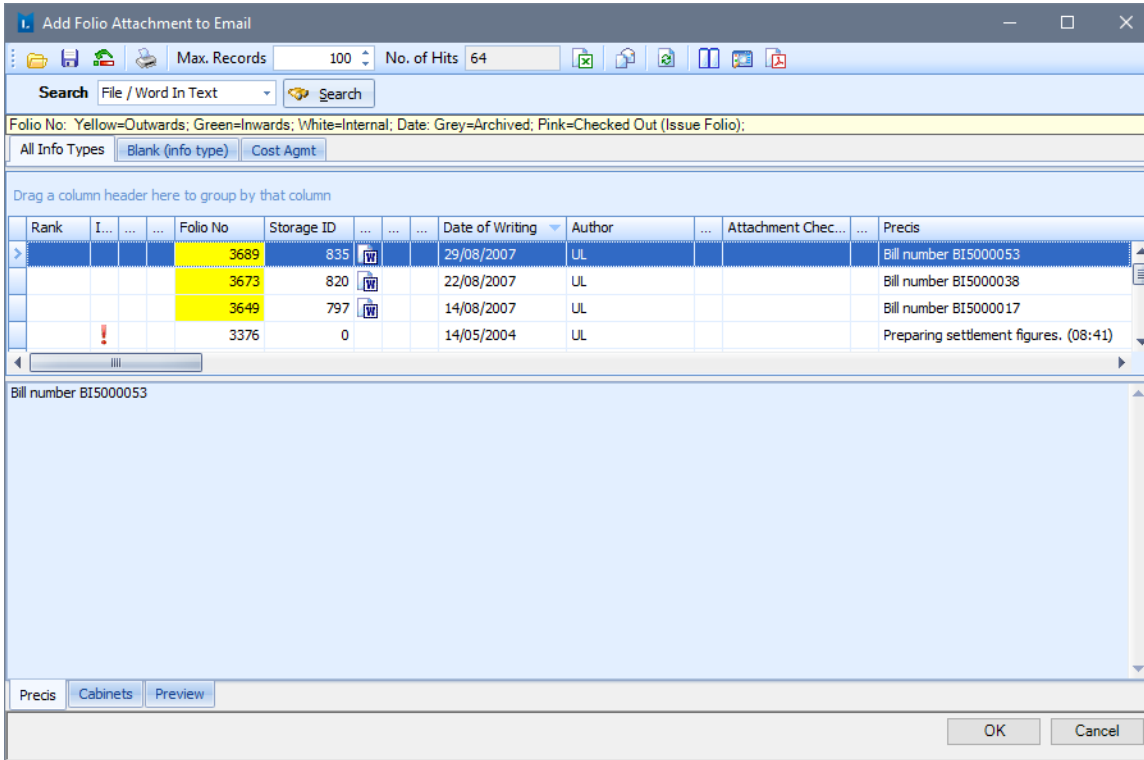


Figure 32

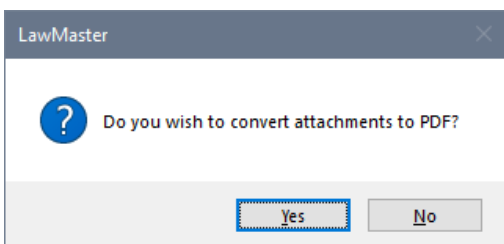


Figure 33

- ❖ **Do you wish to convert attachments to PDF? Select → Yes**. This will convert the attached document to a PDF file before emailing. Repeat the process for any other attachments required.

**Note:** If the document you wish to attach to an email is already a folio in LawMaster, open the Folios screen from the Matter Toolbar and locate the folio in the grid. Right Click Context Menu → Click **Send Folios** → Click **Email Attachments Only**.

## Folios

Matter Toolbar → Folios

Folios for a specific matter are accessed from the Folios button on the Matter Toolbar. All functions for this grid are available via the Context Menu. The following are most commonly used functions:

- ❖ Edit Attachment - allows you to edit an attachment associated with the folio record. You will be prompted if you want to change the Date of Writing, if you select yes, LawMaster will update the Date Create. The attachment will then be opened in the appropriate program e.g. Word or Excel. You can then make any changes and re-save the document. The document will be “checked-out” for editing.
- ❖ Modify Attachment Name – Allows the user to modify the name of the attached file.
- ❖ New Version – Creates a new version of the selected folio. Note: The versions history will be displayed from the Version tab (bottom of folio screen).
- ❖ Search – Precis or Within Documents. Note: Where the user wishes to return to the original search results a ‘Search Criteria’ panel has been added to the top of the grid, which details the search criteria chosen and includes a ‘Reset Search’ button to quickly reset to a default matter folio search.
- ❖ Send Folios – Both email and fax options are provided via a sub-menu. The system provides a check box on the email screen to nominate whether the attachment/s are to be sent as a PDF or not.
- ❖ New Email – This will create a new blank email message, with the subject line generated using the MTM subject template. This can also be achieved via the shortcut of Ctrl + N.
- ❖ Reply – If the Folio is an email this feature provides a Send Email screen in order to reply to the selected email.
- ❖ Reply All - Reply All – If the Folio is an email this feature provides a Send Email screen in order to reply to the selected email. Both Reply and Reply All options can be achieved via the shortcut of Ctrl + Shift + R.
- ❖ Forward - Any attachments in the original email will be included in the Forwarded Email as per the Outlook “Forward” function. This can also be achieved via the shortcut of Ctrl + F.
- ❖ Forward as Attachment – If the Folio is an email this feature provides a Send Email screen with the original email as an attachment. This can also be achieved via the shortcut Ctrl + Alt + F.
- ❖ Refer To – Refers the attachment to another user for checking/editing.

- ❖ Export/Print - Exports the selected Folio/s and Attachments to a specified directory. The Export/Print dialog box is presented. The Operation field has three options available as outlined below:

### Export to File System:

Exports the selected folio/s and Attachments to a specified directory. Document list can be created using WP form FOL to provide full list of Folios selected. Convert to PDF is also available.

### Publish to PDF

Publish to PDF will combine all documents into a single PDF document (with default "Page X of Y" at the bottom left of each page). The default page numbering can be overridden by setting a firm wide default or changed at the time of producing the PDF document via the page number settings tab. The PDF document will be placed in the specified Publish Directory. When the Info Type Order is ticked the folios will be sorted in Information Type order and a cover sheet using WP form IF 'Information Type Header' will be at the start of each Information Type. Include Page Numbers is also available.

### Print:

Print will combine all documents into a single PDF document (with "Page X of Y" at the bottom left of each page). It will then print this single document. Convert to PDF and Include Page Numbers is also available.

Publish and Print options - Any documents that cannot be converted to PDF (such as WAV, etc.) will be attached to the PDF document and there will be a "placeholder page" in the document for each non-pdf file with the filename. A paperclip icon and the text (double click paperclip to open file). The text is only relevant for the Publish option.

- ❖ Print Attachment(s) - Folio attachment is sent directly to the printer.
- ❖ Print File Note(s) - Merges selected Folio into Matter File Note WP Form ('MFN') ready for printing.
- ❖ Print Folio(s) - Presents the Export Folio(s) screen.
- ❖ Tabs are provided below the grid to display relevant information for the selected folio in the grid e.g. Precis, Movements, Bring-ups, Versions & Preview. The Bring-ups & Versions tabs have a Context Menu available.
- ❖ Split Folios - This function allows the user to split folio(s) by every page or by a page range. These documents are then saved to the selected directory as PDF documents.

There is a checkbox option to “Combine into Single File?”. If selected, this will combine the split folios into one PDF document. For example, splitting a folio using a page range of “1,3,5-7” will create three separate PDF documents (page 1, page 3 and pages 5-7). If the “Combine into Single File?” checkbox is ticked, it will produce a single PDF document containing pages 1, 3 and 5-7. There is also a “Save to new folio(s)” checkbox, which if selected, displays a pre-populated Add Folio screen to automatically save the split folio(s) as a folio on the matter. If the split folios are not combined into a single folio, multiple “Add Folio” screens are opened for each folio being saved.

- ❖ **Compare Folios** - This allows the user to compare two folio attachments using Word’s compare functionality. Both attachments must be capable of being compared (supported file types are .DOC, .DOT, .RTF, .ODT, .TXT, .XML, .DOCX and .DOCM). To use the functionality, select two folios (holding the CTRL key and clicking to select the second folio) and then select “Compare Folios” from the context menu. Of those two documents, the folio which is right-clicked will be considered as the original document. The user then has the option of saving the compared document as a folio before the compared version is displayed.

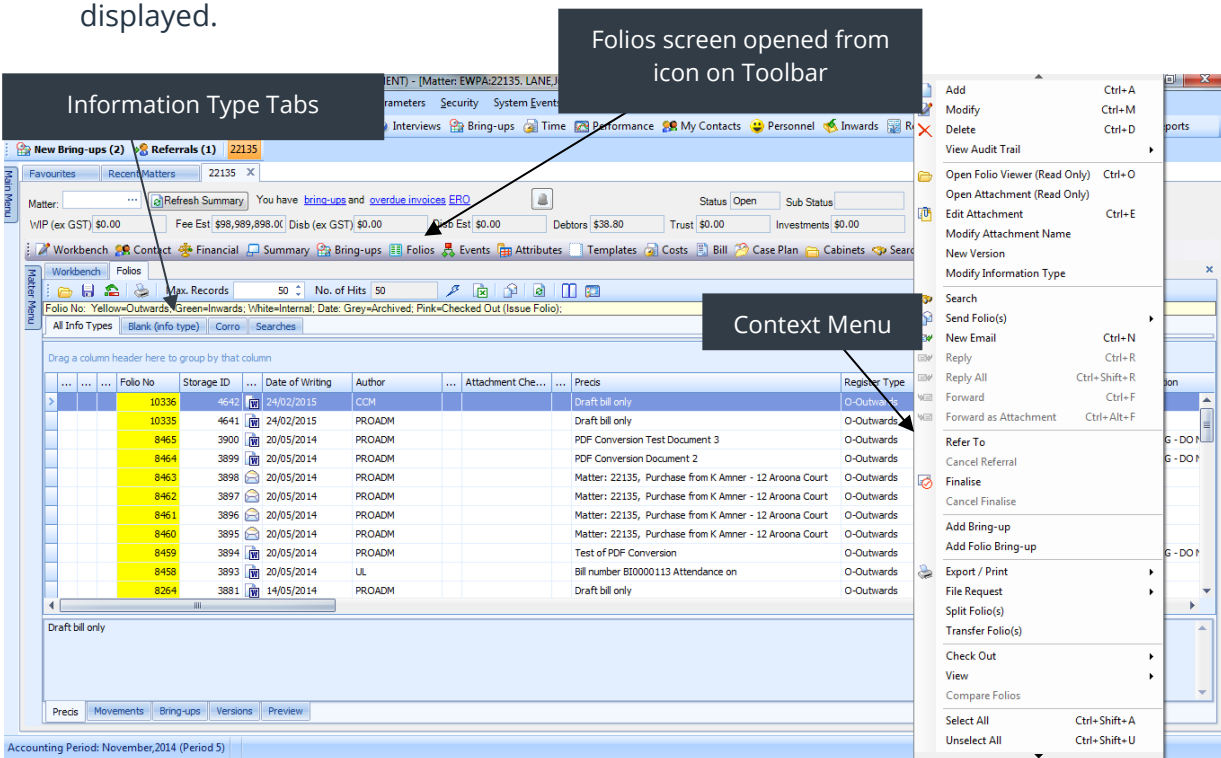


Figure 34

A search of all folios within the database is available and accessed from the [Menu bar](#) → [Enquiries](#) → [Folios](#).

## Folio Viewer

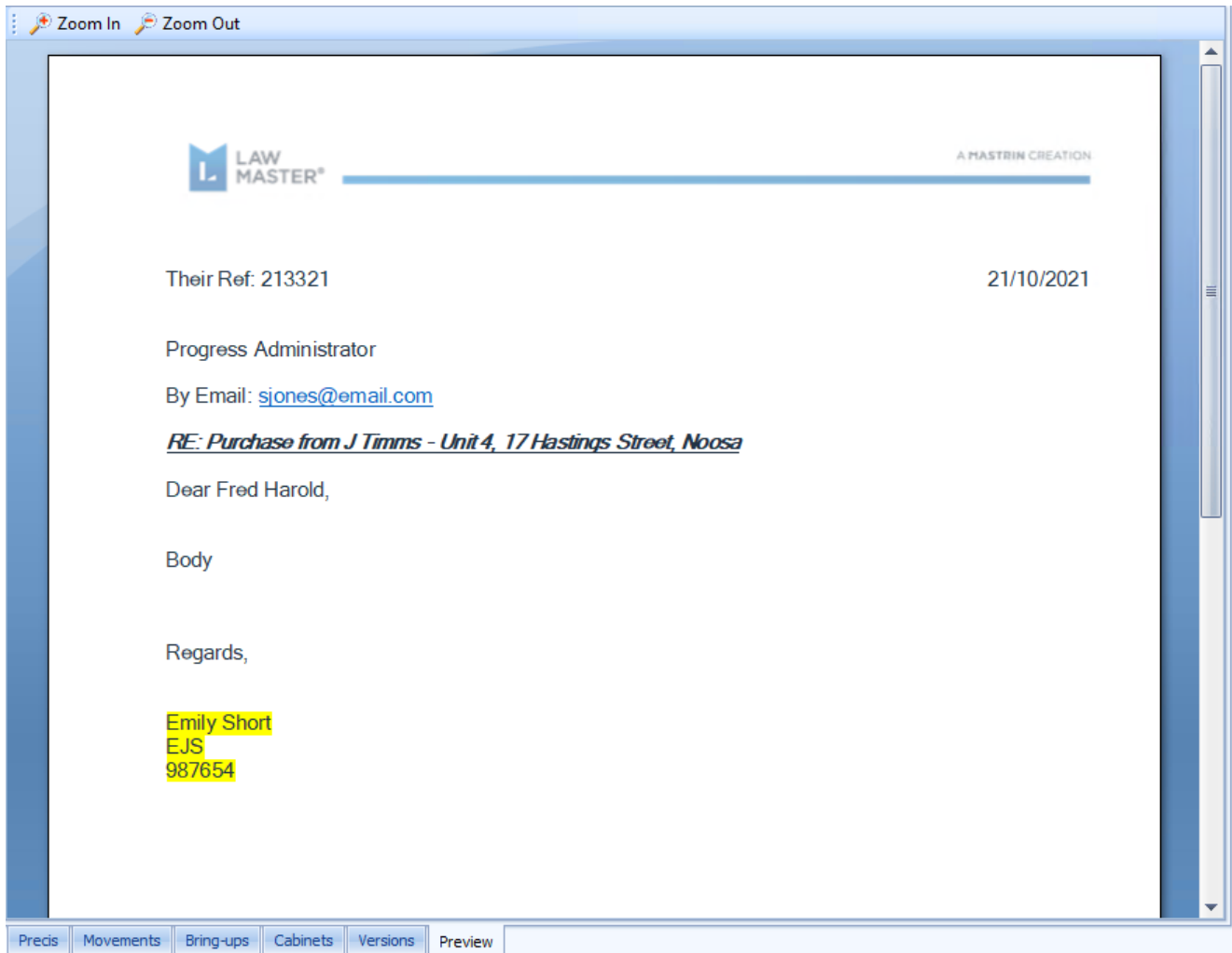


Figure 35

The Folio Viewer enables a user to quickly review folios in Read Only mode. The Folio Viewer may be accessed by selecting Open Folio Viewer (Read Only) from the context menu in the Folio Enquiry screen, selecting Ctrl+O on the keyboard or double-clicking on a selected Folio. Functionality includes:

- When you open the folio in the Folio Viewer, attachments no longer open an instance of the application used to edit the file (The only exception to this is when you have an MSG file attached to another MSG file, i.e. an email within an email). The Folio Viewer displays a separate tab for each attachment to the folio record.
- Once opened, the Folio Viewer will display the row selected in the folio grid. You can navigate through the folios in the folio grid via the "Previous" and "Next" buttons on the Folio Viewer Alternatively, you can use the UP and DOWN arrows, or click on a different folio in the folio grid, which will load the newly selected folio into the Folio Viewer. This

means that you can open the Folio Viewer and then “jump” around the folio grid, clicking on rows and having them loaded into the Folio Viewer.

- To allow for multiple folios to be opened, there is a “Lock Folio Viewer” check box on the Folio Viewer. This operates as follows:
  - When the Folio Viewer is opened, this check box is un-ticked. In this mode, the Folio Viewer operates as a Viewer, allowing you to select different folios from the grid and having them loaded into the Folio Viewer.
  - If you want to open multiple Folio Viewers, perhaps to compare folios side-by-side, tick the “Lock Folio Viewer” check box. This will “lock” the Viewer so it will only display the folio presently populated into it. You can then open another Folio Viewer from the folio grid. If more than two Folio Viewers are required, just repeat this process with the second and any subsequent Folio Viewers.
- ❖ The Folio Viewer can be floated out of LawMaster to make use of split screens.
- ❖ As you navigate through documents, it will only fetch once from the DMS.
- ❖ Folio Viewers window has been simplified to give you more room for the document.
- ❖ Better memory management ensures that when you close down the matter, all folio viewers get closed and associated instances of Word, Excel etc. get removed from memory.
- ❖ Special handling for emails, so that email attachments are held as separate tabs.
- ❖ Edit button – When a folio is opened in Read Only mode to allow the user to easily open the attachment for editing. This does not presently work for Excel files (XLS, XLSX, CSV) as there are some limitations to the way Excel operates in the current version of the folio viewer.
- ❖ Print button – Facilitates printing the folio's attachments. If there is an email with attachments, then there will be a dialog asking whether you wish to print the attachments.
- ❖ “Reply”, “Reply All” and “Forward buttons have been added to the folio viewer when viewing an email.

## Outlook Integration - Sending & Saving Emails

A LawMaster ribbon is visible in Outlook via the Inbox, Calendar, Tasks, etc.). This allows the user to send an email directly from Outlook and associate it with a file in LawMaster as well as set basic configuration options. These configuration options are saved on a per-user and per-machine basis.

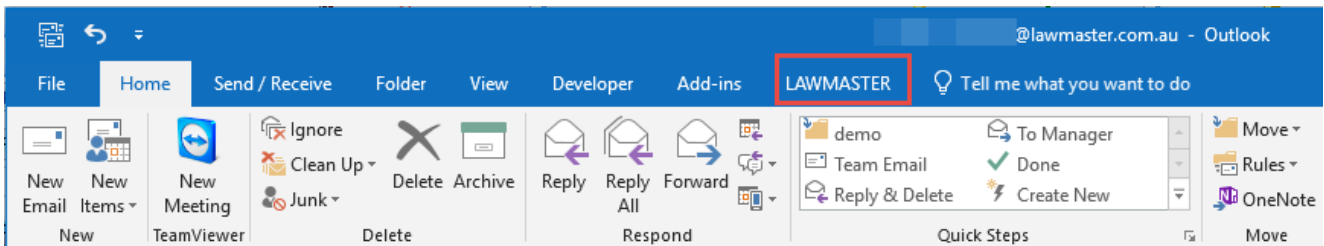


Figure 36

- ❖ **New LawMaster Email.** The user will be prompted to select a LawMaster File Type and File Number to associate the outgoing email to.
- ❖ **Save Outbound Email to Folio**
  - **Show Save Dialog.** Enabled by default, shows a 'Save Email' dialog for outgoing emails not already associated with LawMaster.
  - **Check Subject.** Enabled by default, only shows 'Save Email' dialog if Subject line contains LawMaster keywords e.g. "Matter 123" will be prompted for saving but "Corporate Meeting" will not prompt for the email to be saved as a folio if this option is enabled.
- ❖ **Default Server.** The default server that will be displayed in the 'Save Email' dialog. This is useful where you need to test against the Training Database.
- ❖ **Troubleshooting Options.** Additional options seen here are generally used for troubleshooting.

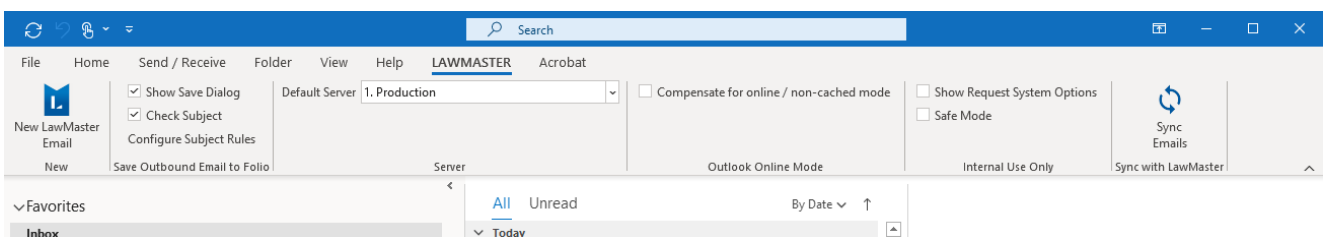


Figure 37

## Sending Email from LawMaster

Where the email is generated from LawMaster the New Email window will include a LawMaster ribbon. The LawMaster ribbon provides the following functionality:

- ❖ **Create Folio.** This is selected by default to save on sending the email.
- ❖ **Mark the email as 'Important' or Discoverable'**
- ❖ **Add a Bring-up**

- ❖ **Insert a Standard Clause.** In both the message body and the end of the subject line.
- ❖ **Insert a Variable.** In both the message body and the end of the subject line.
- ❖ **Add/review Folio Attachments**
- ❖ **View and select from the LawMaster Address Book** (Entity, Contact, User and Distribution List.)
- ❖ **Process MTM**

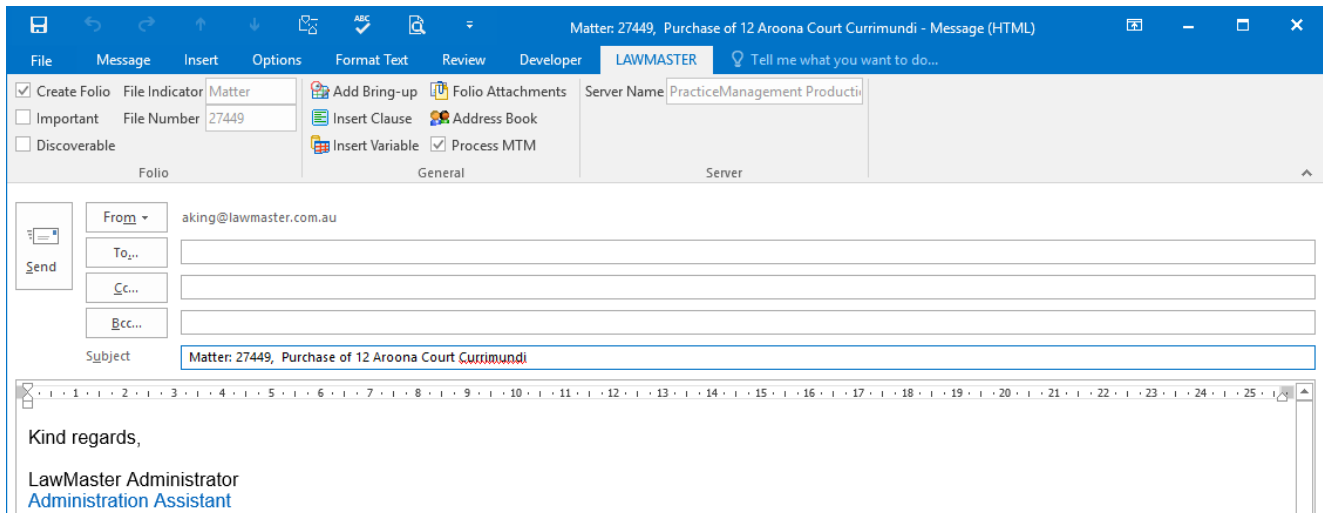


Figure 38

## Sending Email from Outlook

A LawMaster ribbon is available from the main Outlook screen which provides an option to create a LawMaster associated email using the 'New LawMaster Email' icon.

Upon selection the user will be prompted to select a File Type and File Number to associate the email to within LawMaster. The following file associations are available - matter, entity, employee, request, subject file, tech library, new client, purchase order and deed. If the file chosen is a matter or request, the subject line of the email will be automatically updated in the New Email window and the LawMaster ribbon displayed in the same format as if the Email originated from LawMaster. Once the user has selected Send the email will be saved as a folio to the nominated file.

Where the Outlook Integration parameter is set to Delete Email after Send, emails sent in this manner will be automatically moved from the Outlook Sent Items folder to the Deleted Items folder.

Emails sent directly from Outlook that haven't been initiated from the New LawMaster Email icon may also be saved to a LawMaster file as part of the Send process e.g. New Email, Reply, Reply All or Forward where the Show Save Dialog checkbox is ticked in the LawMaster ribbon and the email being sent is not already associated with LawMaster. An email "associated with

LawMaster" is one created by the LawMaster Practice Management Client", e.g. select Email from the context menu in the Contacts tab against a matter.

The "Save Email to Folio?" dialog displays the Default Server, File Type and File Number selection options. The user has the option to select:

- ❖ **Yes.** Saves the email as a folio after sending
- ❖ **No.** Send the email without saving to LawMaster
- ❖ **Cancel.** Closes the "Save Email to Folio?" dialog and returns the user to the Send Email window.

## Folio Attachments

When using the LawMaster Outlook add-in all email attachments are now able to be viewed in the Outlook Attachments view.

The [LawMaster Ribbon → Folio Attachments](#) button opens the folio enquiry screen and any folios selected for addition to the email using this method are immediately added to the list of Outlook Attachments.

If the selected folio to be attached to the email has been checked out the user is taken to a Pending Check-ins dialog. This screen displays a list of the checked out folio attachments, allowing the user to check the document in (if they are the checkout holder), or press the OK button to attach the server version of the document. If the user clicks CANCEL, any folio attachments that are checked out are not included in the email attachments. Subsequent changes to the server version of the folio will not be reflected in the message; even if the message is sent after folio changes are checked in.

The Pending Check-ins dialog is also used when the user attempts to add a folio to a fax, where that folio has checked out attachments.

## Saving Incoming Emails to LawMaster

There are various methods to save an email from Outlook into LawMaster.

- ❖ Drag and Drop
- ❖ Use Floating File Note
- ❖ Via the LawMaster Ribbon

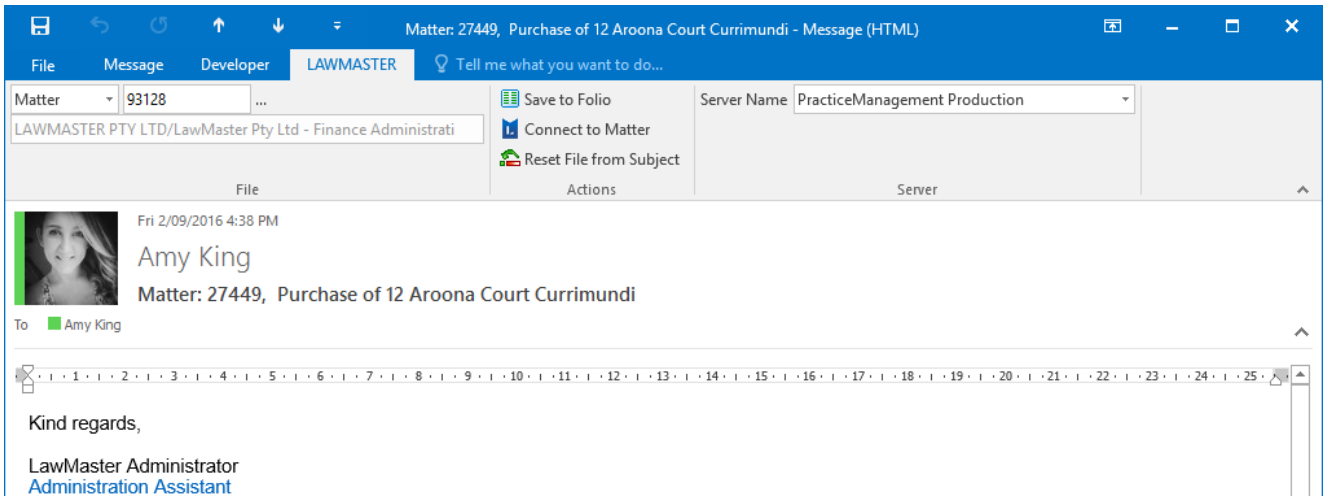


Figure 39

When saving using Drag and Drop or via the Lawmaster Ribbon, the user will be prompted with a floating file note window which, in addition to saving the email, also provides the opportunity to –

- ❖ Add a bring
- ❖ Specify the Information Type (folio tab)
- ❖ Override File Name
- ❖ Add a Time Record transaction.

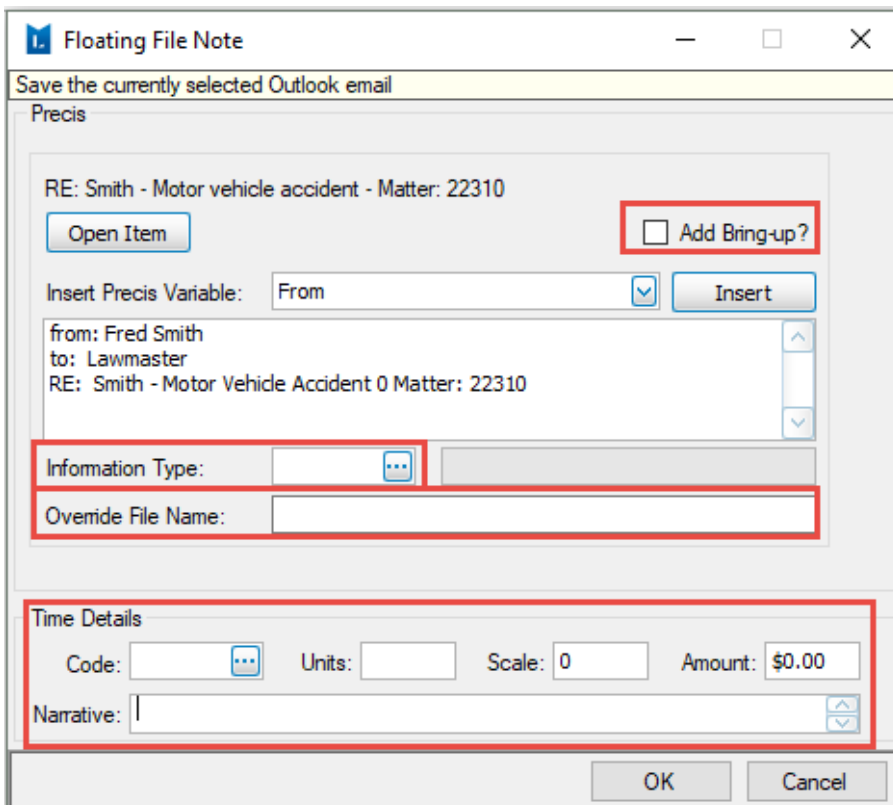


Figure 40

In addition to this, when saving a single email which contains attachments, the attachments can be saved as separate folios. Where 'Import Email Attachments as Separate Folios' is checked and 'Email Drag/Drop' option is set to Floating File Note or Precis Override, when importing an email with attachments, the user will be presented with an extended dialogue box.

- ❖ Save Attachment checkbox
- ❖ Email Attachment Precis – default Precis will be based on the 'Email Attachment Folio Precis' parameter
- ❖ Internal File No (Floating File Note only) –If the email subject contains a LawMaster File No, then the file type and file number will be pre-filled with this information. For Precis Override the file type and file number of the parent email is used.
- ❖ Information Type – Defaults to Information Type on the Document Template 'Email'.
- ❖ Override File Name.

**You can tick or untick to save attachments as required. (You may wish to untick items which are images attached to the email.)**

Floating File Note
— □ ×

Save the currently selected Outlook email

**Precis**

Email enclosing documents for screenshots

Add Bring-up?

Insert Precis Variable: From

Email enclosing documents for screenshots  
 Email received on 11/10/2021 at 1:10 pm  
 From: A User  
 To: R Cipient

Information Type: D1 ... Documents

Override File Name:

Save Letter to Mr Test.docx?

Insert Precis Variable: From

Letter to Mr Test.docx

Information Type: C ... Correspondence

Override File Name:

Save Information Sheet.pdf?

Insert Precis Variable: From

Information Sheet.pdf

Information Type: F ... Forms

Override File Name:

**Time Details**

Code: ...
 Units: 0.00
 Scale: 0
 Amount: \$0.00

Narrative:

Figure 41

## Saving Documents

Saving documents created outside LawMaster is achieved by using the Drag and Drop or Floating File Note method. The options include Word, Excel, Power Point and Other Applications e.g. Publisher and PDF.

## Templates

Provided the appropriate templates have been set up, documents can be merged from Lawyers Workbench.

Available documents can be viewed from the **Matter Toolbar**, [Click Templates](#).

A tree view is provided with the available categories. Click a category to see the available documents displayed on the right of the screen. Any document that is coloured green is available for merging.

Select the appropriate document, [Right Click Context Menu](#) → [Click Merge](#). The document will then be merged with information already held in the database.

If you [Click Open](#) from the [Context Menu](#) this will open the document as read only and will not insert any information from the database.

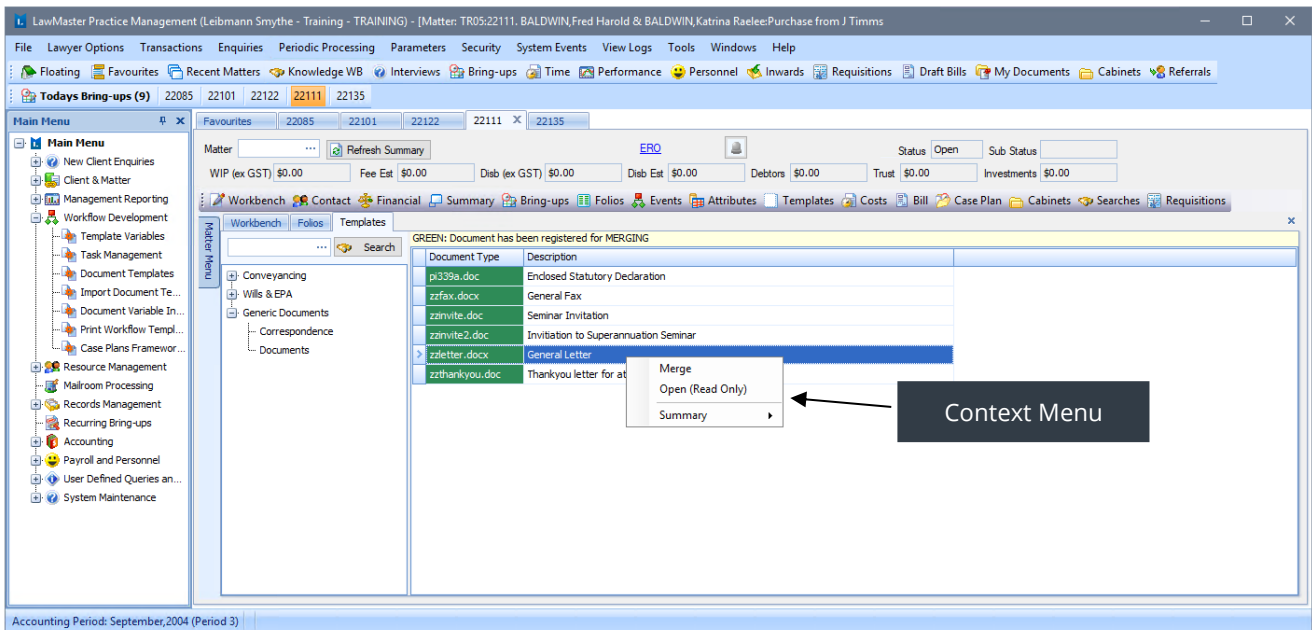


Figure 42

As with letters and faxes, when the document has been merged, the **Add Folio** screen is presented to save the document as a folio to the matter. Enter appropriate details in the fields provided and **Click OK** to save. If you select Cancel, LawMaster will close the document and no folio will be saved.

## Lawyers Toolbar

As well as the Recent Matters screen and the Floating File Note there is a range of functionality available from the Lawyers Toolbar. This includes:

### Recent Matters

From the Lawyers Toolbar, **Click Recent Matters** which provides a list of 'my and recent matters' for the logged on author.

### Favourites

From the Lawyers Toolbar, **Click Favourites** and this feature allows you to select your own favourite items to which they can easily navigate. These items can also be set to run automatically when logging into LawMaster.

### Knowledge Workbench

From the Lawyers Toolbar, **Click Knowledge Workbench** and this feature allows you to conduct a text search across specific areas of the database:

- ❖ Matters
- ❖ Within Documents
- ❖ Deeds
- ❖ Folios
- ❖ Clients
- ❖ Library Catalogue
- ❖ Document Templates
- ❖ Web

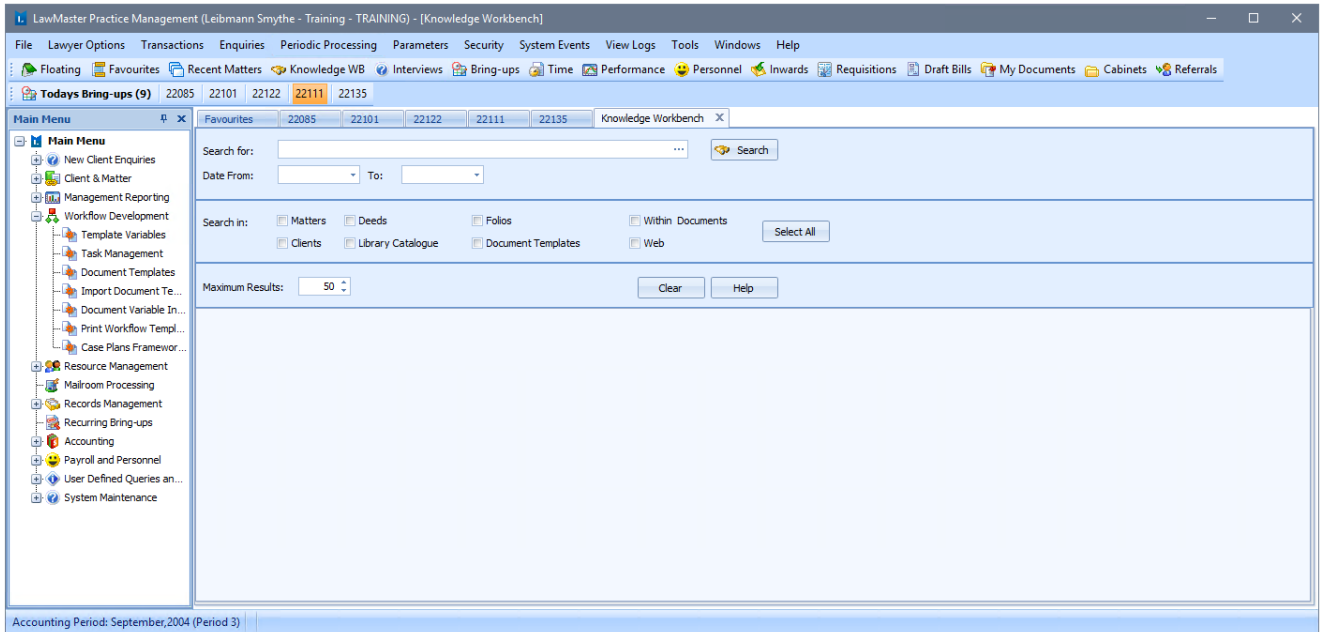


Figure 43

To complete a search type the text in the Search for field. Tick the area you wish to Search in e.g. Matters and Click **Search**. The search results will be displayed in the grid.

## Bringups

Bringups may be accessed from the Lawyers Toolbar → **Bring-ups** or via the Alert Toolbar. This will present the **Browse Bringups** screen in which Bringups for the logged on author will be displayed in a grid.

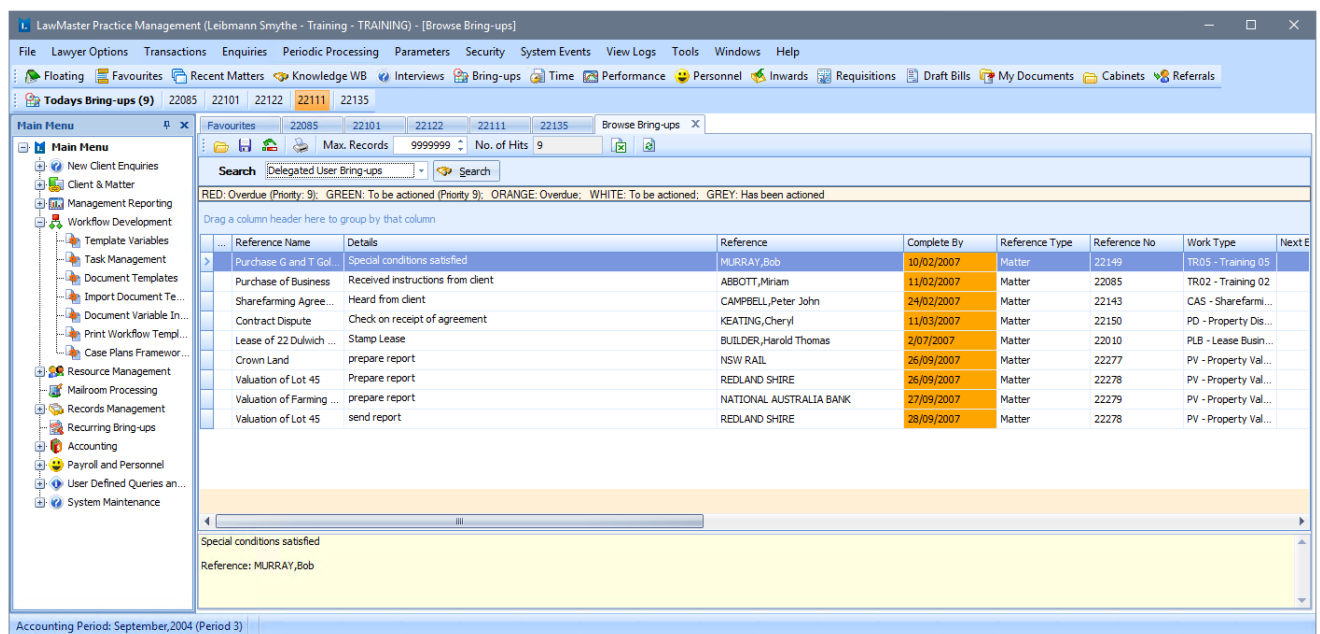



Figure 44

In order to add a bringup:

- ❖ Right Click **Context Menu** ➔ Click **Add**. The following screen will be displayed

Figure 45

- ❖ Delegated user - enter the resource (author) on whose list this Bringups will appear. This will default to the logged on user.
- ❖ Owner – the resource (author) who is the owner/or delegating the bring up to the delegated user. It can be the same as the delegated user. This is used in conjunction with escalation of Bringups.
- ❖ Priority - enter a priority from 0-9, remembering that 9 is a critical priority and will show up as red.

- ❖ Reference Type – is the Bringups being saved against a Matter, Deeds, Entity, Employee, Folio or General? Click the  icon to enter the matching details e.g. if a reference type of Matter is selected, enter the matter number.
- ❖ Type the Details of the Bringups – what you want to appear on your Bringups list.
- ❖ Set a Complete By date. This will be the date the Bringups appears on your list.
- ❖ The Next Event and Next Task fields are used in conjunction with task management.
- ❖ Estimate Time – enter an estimate of time units to complete the task.
- ❖ Reminder – Displays a reminder for this bring-up
- ❖ Reminder Time – Enter the date and time a reminder is to be displayed for this bring up.
- ❖ Client Web Access – Determines visibility in Client Web Access.

## Time

From the Lawyers Toolbar, [Click Time](#) to see all time you have entered displayed in a grid.

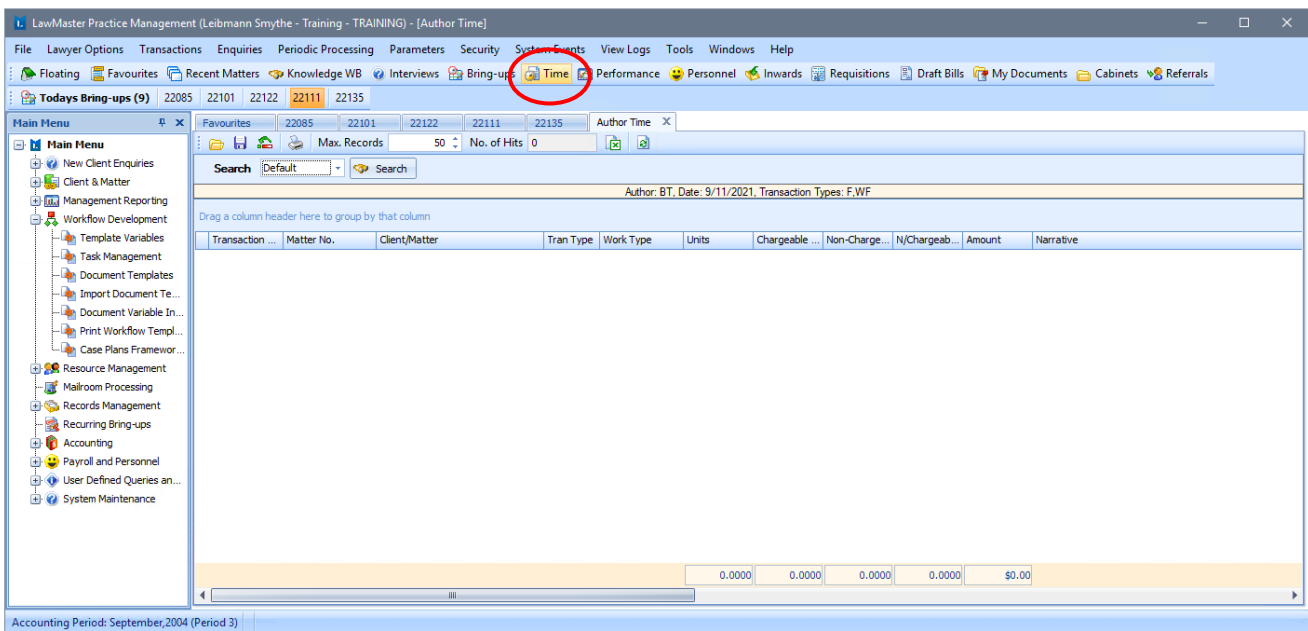


Figure 46

You may view your time entries and a Context Menu provides options to edit these time entries.

If you want to see your time entries over a given period, from the drop down menu select User Defined, click on Search. The Cost By Author: Search Criteria screen will appear where you can enter in the relevant period.

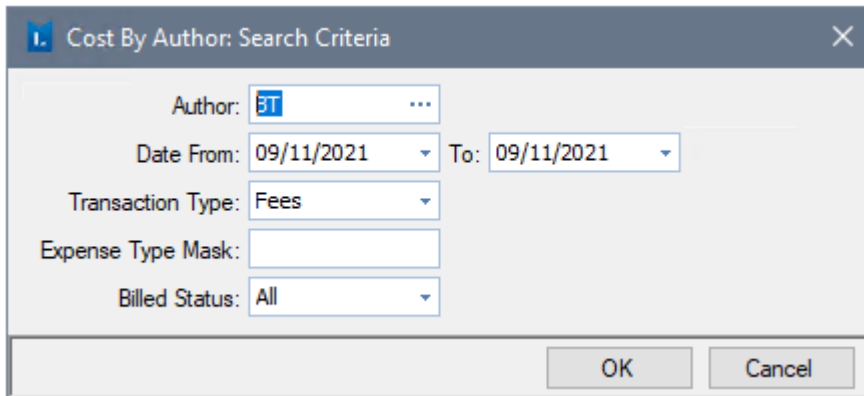


Figure 47

## Performance

From the Lawyers Toolbar, [Click Performance](#). This will display author performance information for the logged on user.

## My Contacts

From the Lawyers Toolbar, [Click My Contacts](#). This is similar to the Outlook contacts. You can compile a list of parties that communicate with regularly. They must be entities on the database before they can be added to this screen. To add an entity to this screen, [Right Click Context Menu](#) → [Click Add Contact](#).

## Personnel

From the Lawyers Toolbar, [Click Personnel](#). This screen allows you to view your payroll details e.g. tax file number, leave etc. To access this screen, you will need to type in your LawMaster password.

## Inwards Correspondence

From the Lawyers Toolbar, [Click Inwards Correspondence](#). If the firm is using the Mailroom Processing facility this screen will allow you to view any mail that has been scanned and assigned to you.

## Requisitions

From the Lawyers Toolbar, [Click Requisitions](#). This screen may be used to enter trust and general cheque requisitions.

## Draft Bills

From the Lawyers Toolbar, [Click Draft Bills](#). This grid displays all matter on which a draft bill has been saved.

## File Notes

From the Lawyers Toolbar, [Click File Notes](#). This screen allows you to print file notes for a given work unit range, author range and date range.

## My Reports

From the Lawyers Toolbar, [Click My Reports](#). This screen allows you to select an item from the list to report on for matter which you are the responsible lawyer. The report is provided in grid format.

## My Documents

From the Lawyers Toolbar, [Click My Documents](#). This screen shows you which documents are checked out to you.

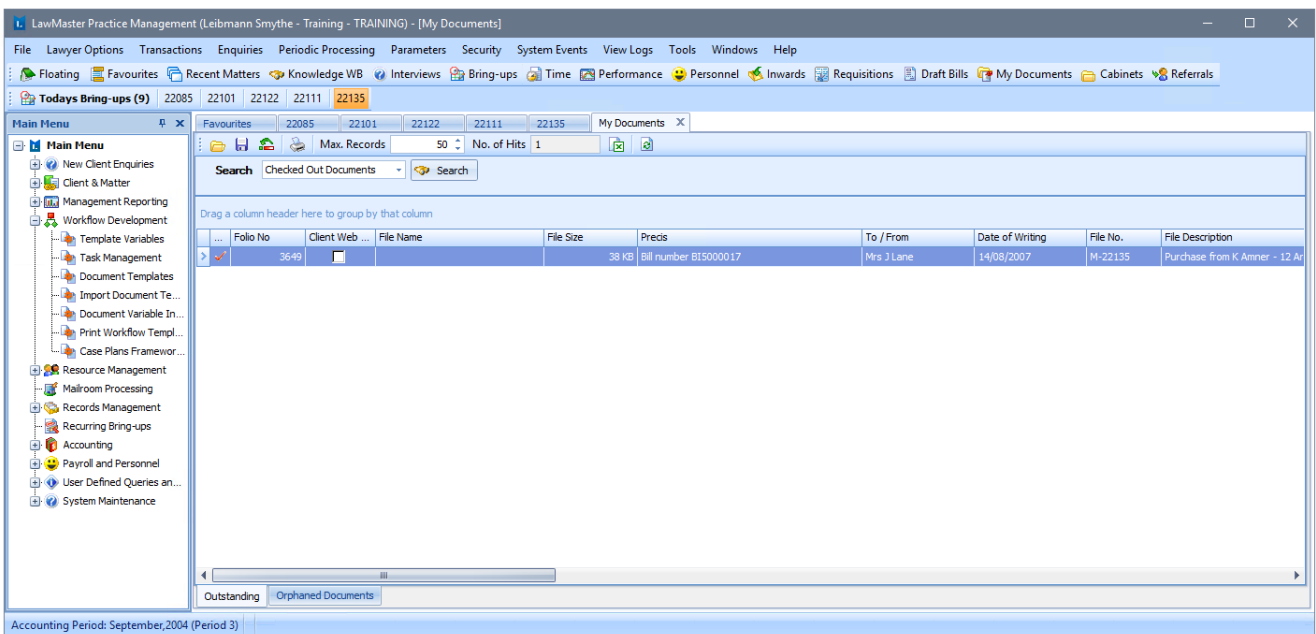


Figure 48

You are able to Search by documents:

- ❖ Recent Documents – this will show you any documents that have been created recently.
- ❖ Finalised by me – this will show you any documents that have been finalised.

From the Context Menu there is additional functionality depending on what has been searched for:

- ❖ Add – adds a new attachment to that folio record;
- ❖ Delete – deletes the document/attachment from the folio record;
- ❖ Open – opens the document as read only;
- ❖ Edit Attachment(s) – checks the attachment out and opens for editing;
- ❖ Refer To – refers the attachment to another user for checking/editing;
- ❖ Cancel Referral – removes the referral record;
- ❖ Finalise – marks the attachment as un-editable (the final product). At the time of finalisation, the user will be prompted to sign the document using a digital signature.
- ❖ Cancel Finalise – marks the attachment as editable. You will only have access to this, if you have the correct security access;
- ❖ Check Out – checks the attachment out for editing;
- ❖ Check In – checks the attachment back in after editing;
- ❖ Undo Checkout – removes the check-out flag from the attachment;
- ❖ Print – prints the attachment where available.
- ❖ Connect to File – displays mater details for folio record.

## Creating Entities

New Entities can be added to LawMaster whilst in the Entity Search screen accessed from the Menu bar. **Right Click Context Menu → Click Add.**

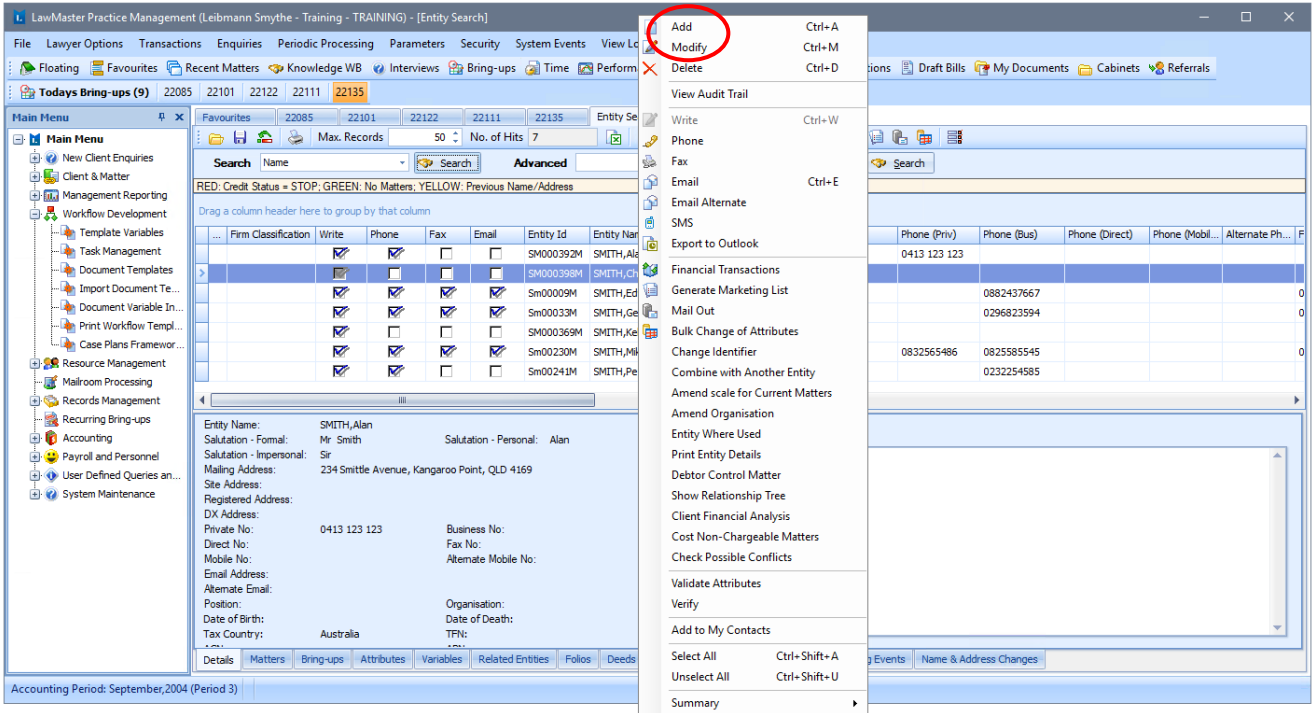


Figure 49

This will present the following Entity Details screen. This screen is made up of 5 parts i.e. Main, Additional Addresses, Financial, Other and Notes. To switch between these screens, click on the labelled tabs at the bottom of the screen.

# Main

**Entity Details**
✕

---

**Details**

Entity Type:   Alert:

Title:  First Name(s):

Surname:

Position:

Organisation:

Date of Birth:  Date of Death:

Alias:  Firm Classification:

---

**Salutations**

Formal:  Personal:  Impersonal:

---

**Link Entity**

Link Entity   All  Mailing  Site  Registered  DX

---

**Mailing Address**

Address Lookup:   powered by **Google**

PO Box / Additional Address Info:  (Optional)  Manual Address Entry

Street Address:

Suburb:  Postcode:

State:  Country:

---

**Contact Numbers**

Phone - Business:   Direct:   Mobile No:

Private:   Fax No:   Alt Mobile No:

Email Address:   Alt Email:

Preferred SMS:  Preferred Written Communication:

Web Site:

---

Last Updated:

By:

---

Main
Additional Addresses
Financial
Other
Notes

Figure 50

The following information can be entered on the Main tab:

### Details

Field Name	Description
Entity Type	Select from the drop-down list. Defines the entity as a company or individual.
Alert	An alert can be set against the entity so that any time someone in the firm searches on this entity, the alert information will be displayed.
Title	For individuals, the person's title, e.g. Mr, Mrs, Miss. For companies, this field is greyed out.
First Name(s)	For individuals, the person given name(s). For companies, this field is greyed out.
Surname or Company Name	For individuals, the person's surname. If a company is selected, the field name changes to Name and is used for the Company name.
Date of Birth	Date of birth of individuals. This is not a mandatory field.
Date of Death	Date of death of individuals. This is not a mandatory field.
Position	For individuals in an organisation, we note here the person's position or title.
Organisation	For individuals in an organisation, we note the person's workplace.
Alias	Should an individual or organisation be known by another name. e.g. Leibmann Smythe might also be known as SmytheLeib.
Firm Classification	This field is designed to hold the primary relationship that an Entity has with the firm.

### Salutation

Field Name	Description
Formal	The entities formal salutation. e.g. when documents are merged, the will merge as Dear Mr Smith. For companies, this completes as Sir/Madam. These can be amended as required.
Personal	The entities personal salutation. e.g. when documents are merged, the will merge as Dear Fred. For companies, this completes as Sir/Madam. These can be amended as required.
Impersonal	The entities impersonal salutation. e.g. when documents are merged, the will merge as Dear Sir. For companies, this completes as Sir/Madam. These can be amended as required.

### Link Entity

Field Name	Description
Link Entity	Links an entity's address to another entity, e.g. link Mike Smith to Leibmann Smythe. To link an entity address, click on Link Entity and

search for the other entity. When they are found, press OK. You may then select which of the linked entity addresses to use.

## Mailing Address

Field Name	Description
Address Lookup	A Google Places lookup has been integrated to allow for faster and more accurate address data editing.
Manual Address Entry	Check this box to manually enter address details (rather than use the Google Places search).
PO Box / Additional Address Details	The Mailing Address details, e.g. PO Box 229. This item is not pre-filled by the address lookup.
Street Name	The Mailing Address street address, e.g. 247, Smyth Street
Suburb	The Mailing Address suburb.
Postcode	The Mailing Address postcode.
Country Code	Used for entities overseas. Select the country from the look-up list. For entities in Australia, it is not necessary to select Australia.

## Contact Numbers

Note: Do not use punctuation in phone number fields e.g. ()

Field Name	Description
Phone – Business	The entities business hours phone number. This is not a mandatory field.
Direct	The entities direct phone number. This is not a mandatory field.
Private	The entities private phone number. This is not a mandatory field.
Fax	The entities fax number. This is not a mandatory field.
Preferred SMS	The mobile number that an SMS will be sent to
Mobile Number	The entities primary mobile number. This is not a mandatory field.
Alt Mobile Number	The entities secondary mobile number. This is not a mandatory field.
Email	The entities primary email address.
Alt Email	The entities alternative email address.
Website	The entities website address.

## Additional Addresses

This screen records any additional addresses the entity might have.

The screenshot shows a software window titled "Entity Details" with a close button (X) in the top right corner. The window is divided into three main sections for address entry:

- Site Address:** Includes an "Address Lookup" field with a magnifying glass icon and "powered by Google" text. Below it is a "PO Box / Additional Address Info" field with "(Optional)" and a "Manual Address Entry" checkbox. Further down are fields for "Street Address", "Suburb", "Postcode", "State", and "Country" (with a dropdown arrow).
- Registered Address:** This section has the same layout and fields as the Site Address section.
- DX Address:** Contains two fields: "DX - No:" and "- Town:".

At the bottom of the window, there is a navigation bar with tabs: "Main", "Additional Addresses" (which is circled in red), "Financial", "Other", and "Notes". Below the navigation bar are three buttons: "OK", "Cancel", and "Apply".

Figure 51

### Site Address

Field Name	Description
Address Lookup	A Google Places lookup has been integrated to allow for faster and more accurate address data editing.
Manual Address Entry	Check this box to manually enter address details (rather than use the Google Places search).
PO Box / Additional Address Details	Additional details for the entity's site address.
Street Name	The entity's site street address, e.g. 247, Smyth Street
Suburb	The entity's site address suburb.

Postcode	The entity's site address postcode.
Country Code	Used for entities overseas. Select the country from the look-up list. For entities in Australia, it is not necessary to select Australia.

### Registered Address

Only completed if there is a Registered Address.

Field Name	Description
Address Lookup	A Google Places lookup has been integrated to allow for faster and more accurate address data editing.
Manual Address Entry	Check this box to manually enter address details (rather than use the Google Places search).
PO Box / Additional Address Details	Additional details for the entity's registered address.
Street Name	The entity's registered address street details, e.g. 247, Smyth Street
Suburb	The entities registered address suburb.
Postcode	The entities registered address postcode.
Country Code	Used for entities overseas. Select the country code from the look-up list. For entities in Australia, it is not necessary to select Australia.

### DX Address

Only completed if there is a DX Address.

Field Name	Description
DX No.	The DX number.
Town	The DX Town.

## Financial Information

Various items of financial related information can be found within the Financial tab.

The screenshot shows the 'Entity Details' window with the following sections:

- Taxation:** Tax Country 1 (AUS, Australia), Tax Country 2, TFN, ACN, ABN, Tax No., Company No., Business No., GIIN.
- Bank Details:** Account Name, Account No., Branch Name, Bank.
- Financial:** Credit Terms, Payment Method, Credit Status, Credit Limit (0), Debtor Statement? (checked), By-pass Overdue Notice? (unchecked).

At the bottom, the 'Financial' tab is circled in red.

Figure 52

### Taxation

Field Name	Description
Tax Country	Records the country for the taxation details. For select countries, changing the country will change some of the other labels available on this screen.
Tax File Number	Tax File Number for individual or company. This is not a mandatory field, but does have a check digit function so incorrect TFN's cannot be entered. Depending on the country, this field may have a different label.

ACN	For a company, their ACN details. This is not a mandatory field, but does have a check digit function so incorrect ACN's cannot be entered.
ABN	For a company, their ABN details. This is not a mandatory field, but does have a check digit function so incorrect ABN's cannot be entered.
GIIN	Global Intermediary Identification Number

### Bank Details

Field Name	Description
Account Name	Bank account name for direct credits.
Account Number	Bank account number for direct credits. Digits must be entered in all positions (including leading zeros). If '-' characters are used for BSB separators, these will be stripped out.
Branch Name	Name of branch where bank account held.
Bank	Bank code for direct deposits. This code is used by APCA and must be defined in Parameter Type 'PN' if bank details are recorded for the entity.

### Financial

Field Name	Description
Credit Terms	Describes the credit terms for creditor entities. Entered in the format of 'nn days' if applicable e.g. 30 days.
Payment Method	Sets the default payment method for this entity.
Credit Status	The credit status imposed for billing entities. May be set to STOP to block further time recording.
Credit Limit	The credit limit imposed for billing entities.
Debtor Statement	Tick box if Debtor Statement is to be issued.
By-pass Overdue Notice?	Tick box if the debtor entity is not to receive an overdue notice.

## Other

This screen records bank account details, debtor management and other miscellaneous details.

Figure 53

### Other

Field Name	Description
Allow Matters	Tick the box if matters are to be attached to the entity, otherwise LawMaster will prevent matters from being attached.
Retain	Tick box if entity is to be retained on file indefinitely.
Referred By	Enter details of who this entity was referred by, if appropriate.
Scale of Charges	Select the scale of charges appropriate for this entity.
Bill Format	Sets the default bill format for this entity.
Default GL Account	The default general ledger account for creditor entities OR for interfacing with external accounting systems e.g. ACCPAC.

Customer Number	Customer identifier for external accounting systems.
Remarks	Further remarks you may wish to enter for entity.
GST Status	Select appropriate GST setting.
Client Manager	Records who the client manager for this entity is.

## Notes

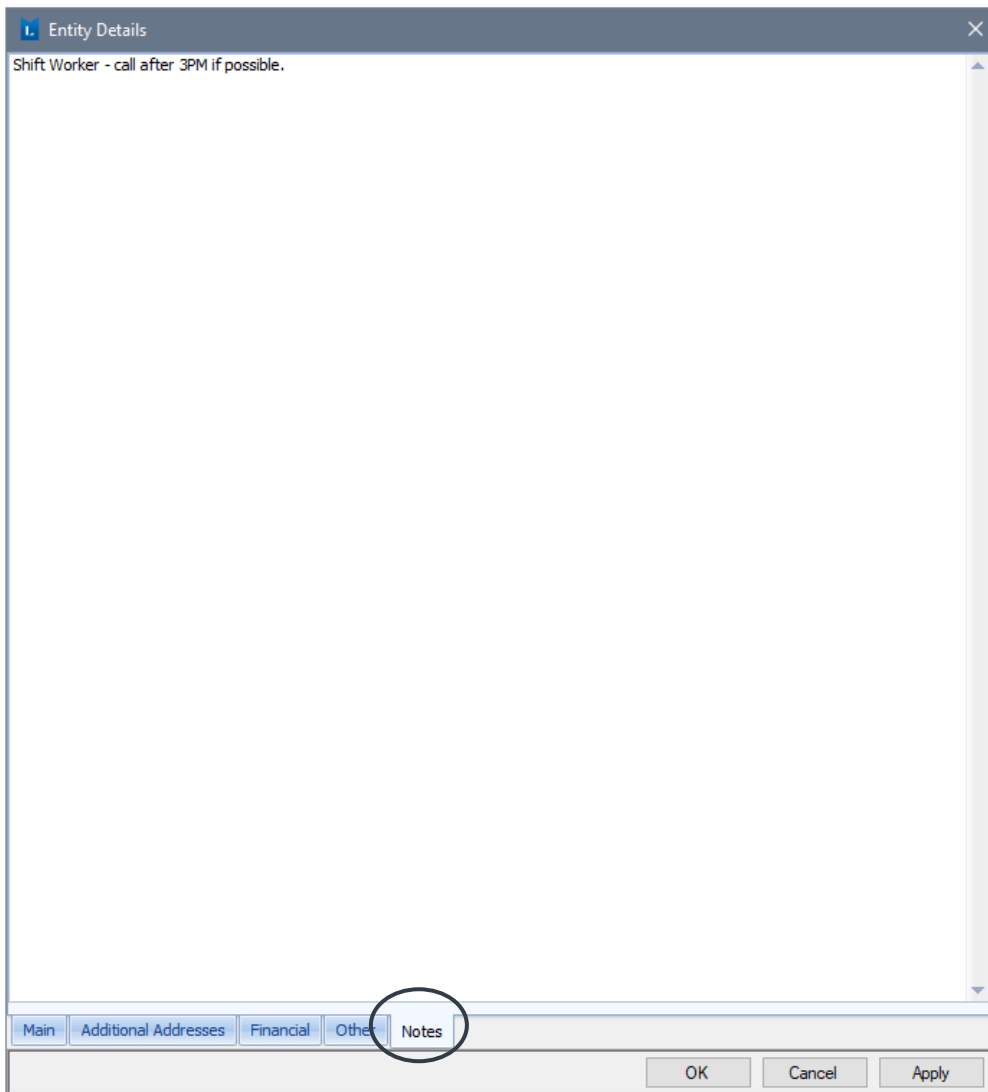


Figure 54

This is a blank text box where you can record information about the entity, e.g. hours of business, issues in the past, general information regarding this person.

When all mandatory information has been entered on these tabs [Click OK](#).

Additional Data Items will then be prompted. The appropriate options may be selected and completed immediately or left to be entered at a later date.

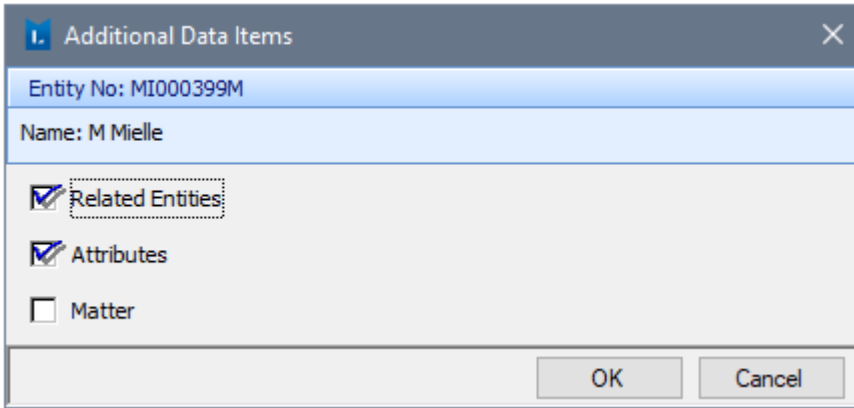


Figure 55

## Adding Related Entities

If Related Entities are not entered at the time of adding an Entity as seen above, they can be added from the Related Entities tab, located at the bottom of the Entity Search screen. Use your Context Menu → **Select Add**.

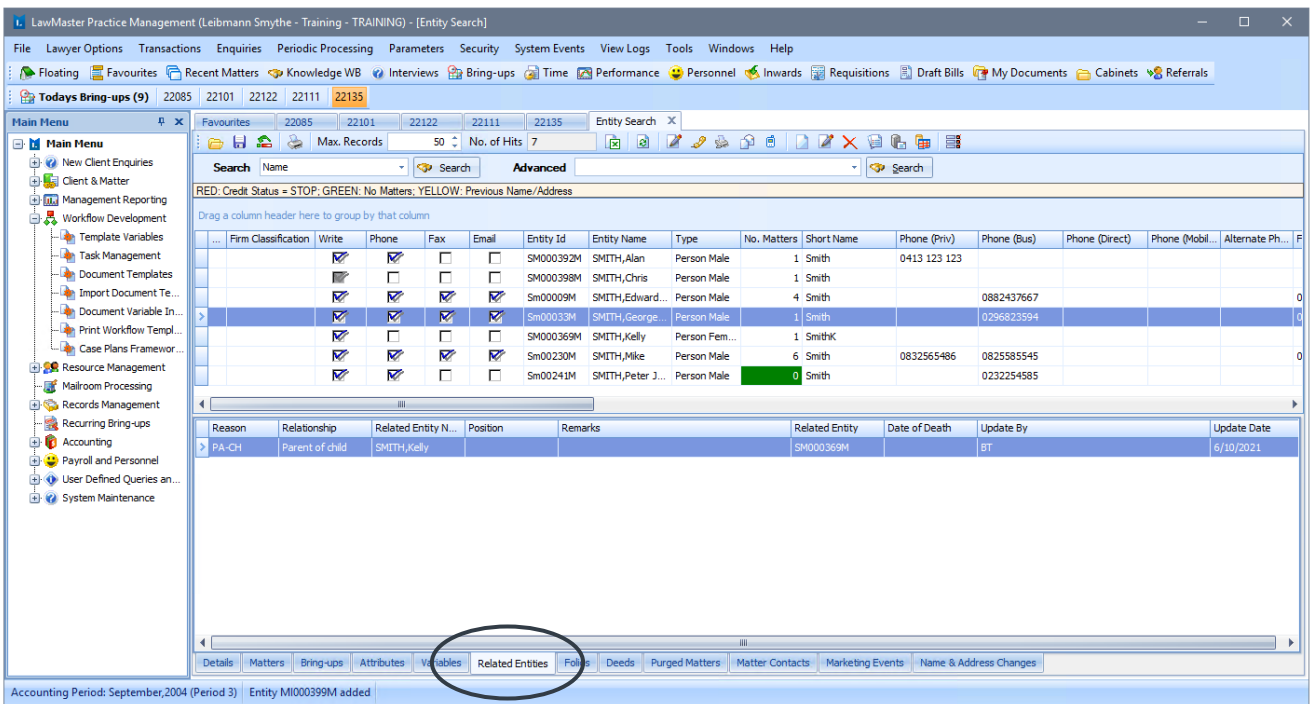


Figure 56

Select the relationship type and child/related entity → **Select OK**

Figure 57

## Adding Attributes

As with the Related Entities, Attributes can be added at the same time as adding the Entity or from the Attributes tab, located at the bottom of the Entity Search screen. Use your Context Menu → Click View Attributes.

Figure 58

Select from the Attributes grid first, then from the Data Values grid by clicking with your mouse → Click Add → Click OK.

**Entity Attributes** [X]

Attributes		Data Values		Current Attributes		
Attribute Type	Description	Code	Description	Attribute Type	Attribute Description	Attribute C...
> BT	Business Type	> AC	Accountants	> Business Type	Business	BTBU
CL	Christmas List	BA	Barristers	Geographical Area	Sydney	GESY
EX	Experts	BU	Business	Nett Value	\$201,000 - \$400,0...	NV02
GE	Geographical Area	IA	Insurance Agents	Client Groups	Professional	CGPR
NV	Nett Value	MP	Medical Practitioners	Client Manager	Ursula Leibmann	CMUL
NL	Newsletter	OP	Other Professionals			
SR	Source of Referral	PP	Primary Producer			
CG	Client Groups	RE	Real Estate Agents			
CM	Client Manager	RT	Retired			

Include Invisible Parameters

Figure 59

## Adding Matters

As with entities, matters may be added from a number of places within the database. For example, new matters can be added to LawMaster whilst in the Matter Search screen accessed from the Menu bar. [Right Click Context Menu](#) → [Click Add](#). The following screen is then presented.

The screenshot shows the 'Add Matter Details' dialog box with the following fields and values:

- Matter No: 0
- Client ID: SM00033M
- Description: (Empty text area)
- Matter Size: (Empty dropdown)
- Dates - Opened: 09/11/2021
- Est Bill: (Empty dropdown)
- Limit: (Empty dropdown)
- File Security: A
- Work Unit: (Empty dropdown)
- Trust Bank: 21
- Contact ID: (Empty dropdown)
- Account To: (Empty dropdown)
- Lawyer: (Empty dropdown)
- Partner: (Empty dropdown)
- Paralegal: (Empty dropdown)
- GST Status: Taxable
- Billing Entity: (Empty dropdown)
- Bill Format: (Empty dropdown)
- Billing Frequency: Not Defined
- Fee Basis: (Empty dropdown)
- Scale: (Empty dropdown)
- MOP Code: (Empty dropdown)
- Charge Type: Unknown
- Debtor Control: (Unchecked)
- Remarks: (Empty text area)
- Referred By: (Empty dropdown)
- Barcode No: 0
- Other Party Ref: (Empty text field)
- Client Reference: (Empty text field)
- Estimates: Fees: \$0.00, Disbursements: \$0.00, Quantum: \$0.00
- Limits Disb: \$0.00, Limits Fees: \$0.00, Funding - Upfront: \$0.00
- Security: \$0.00, Sec Type: (Empty dropdown)
- Client Web Access: (Unchecked)

Figure 60

The matter number will be automatically assigned (unless your firm has this feature turned off in parameters). You must then complete the Details tab. Those fields with the are mandatory and MUST be completed in order to add the matter.

Field	Description
Alert	Allows you to set an alert for the matter e.g. must pre-pay, stop credit.
Retain	Retains matter indefinitely i.e. won't be purged off the system.
Client ID	Select the client for which this matter is being opened.
Work Type	Parameters (Area of Law) e.g. Heading – LI = Litigation Work Types – LIC = Criminal LIP = Personal
Description	This is the matter description or Matter Re:
Matter Size	Set by parameters - set the size of the matter e.g. large, medium, small.
Sub-status	Set by parameters – the status of the matter e.g. Current, Settled.
Date Opened	Date the matter is opened (Today).
Est Bill	Date estimate matter will be billed.
Limit	Date the matter will be closed.
File Security	Who can access this information e.g.? A – all. This is controlled by parameters.
Work Unit	Team looking after the matter.
Trust Bank	The bank to be used for your trust bank account. In most cases it is 21.
Contact ID	Contact for client e.g. Client is company and Contact is a specific person you deal with in that company
Account to	When billing, this is the billing address. If you leave it blank it will default to the Client or the Billing Entity.
Lawyer	Lawyer in charge of matter
Partner	Partner in charge of matter
Paralegal	Paralegal who will be assisting on matte
GST Exempt	A flag to give the GST status of the matter: N – Not Exempt P – Pre GST Transactions subject to GST F – Fess GST exempt D – Disbursements GST exempt <i>B – Both fees and disbursements GST exempt</i>
Billing Entity	Who we will be billing on the matter if it is not the Client e.g. On a lease matter we act for lessor and we will be billing lessee.
Bill Type	The available bill templates. Select the appropriate template for merging bills on this matter.
Billing Frequency	Set the frequency for billing the matter: Not Defined Monthly Quarterly Milestone On Completion

Fee Basis	Allows you to define a fee structure for the matter e.g. capped. This is set by parameters.
Scale	The scale rate will be used in billing this matter. These are parameters.
MOP Code	The Method of Payment Code. This merges on to the bill and calculates the payment due date. If left blank it will use the default e.g. 7 days, 14 days etc.
Charge Type	Select the appropriate billing/time recording status for your matter. F – Fixed price T – Time based fees S – To scale N – Nonproductive and not chargeable D – Fixed fee excluding disbursements (used for debt collection matters) P – Productive legal work but not chargeable
Debtor Control	If this is a debtor control matter – used for chasing client’s debts.
Remarks	General remarks in relation to repayment of debt.
Referred By	How matter was referred to the firm <ul style="list-style-type: none"> <li>• Internal – employee of the firm</li> <li>• External – another client</li> <li>• Campaign – Yellow pages.</li> </ul>
Other Party Ref	Other party’s reference.
Client Reference	Client’s reference
Estimate Fees & Disbursements	What we estimate we will charge or what we have estimated to the client.
Quantum	Amount of quantum
Limit Disb. and Fees	Set a limit for WIP and disbursements. A message comes up warning you are over the limit
Funding Upfront	Amount of payment required upfront (to be placed into Trust).
Security	Dollar value of security held in lieu of payment.
Sec Type	Type of security held
Client Web Access	This matter is available through client web access.

Figure 61

The Notes tab, is a ‘free typing’ area where you can enter any other relevant details relating to this matter.

## Tasks & Events

It is possible to automate an area of law within LawMaster e.g. conveyancing. We call these Workflows.

These Workflows are then broken down into Events (or stages of a matter). Each Event will then contain a number of Tasks that need to be performed in order to complete that Event (or stage). If you are using a Workflow on a selected matter you will be able to access the Events and Tasks from the Events button on the Matter Toolbar.

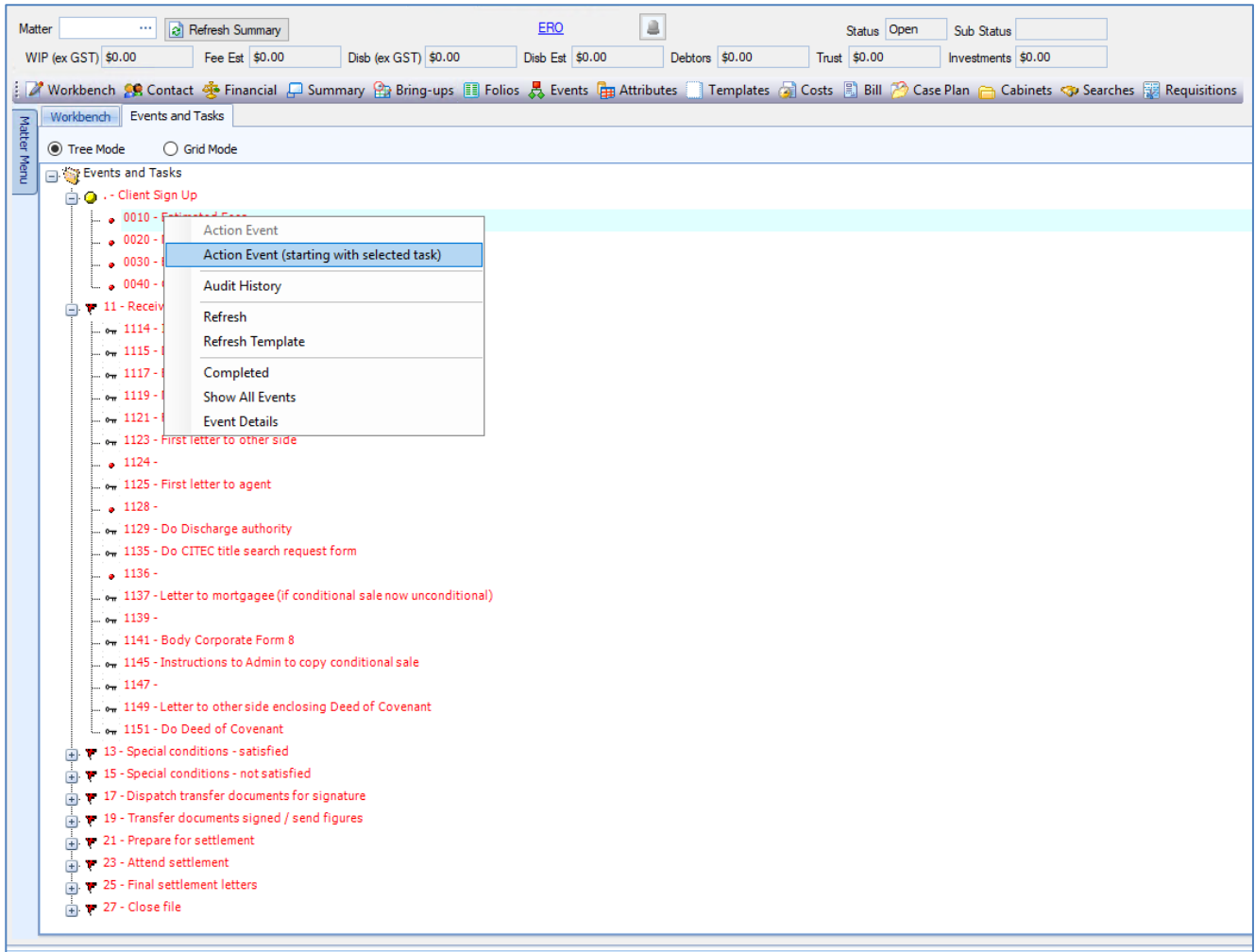


Figure 62

Events and Tasks are colour coded as follows:

**RED** – Event/Task has not been actioned.

**YELLOW** – Event will be yellow when some tasks, but not all tasks for that Event have been actioned.

**GREEN** – A Task will be green if completed. An Event will be green if all tasks within that Event are completed.

To action an Event i.e. perform the Tasks listed under that Event, either **double click** on the Event OR highlight the Event and Right Click **Context Menu** → click **Action Event**.

LawMaster will then provide you with a series of prompts to direct you through the tasks required for the Event. The prompt screen that will be presented will look similar to the one below.

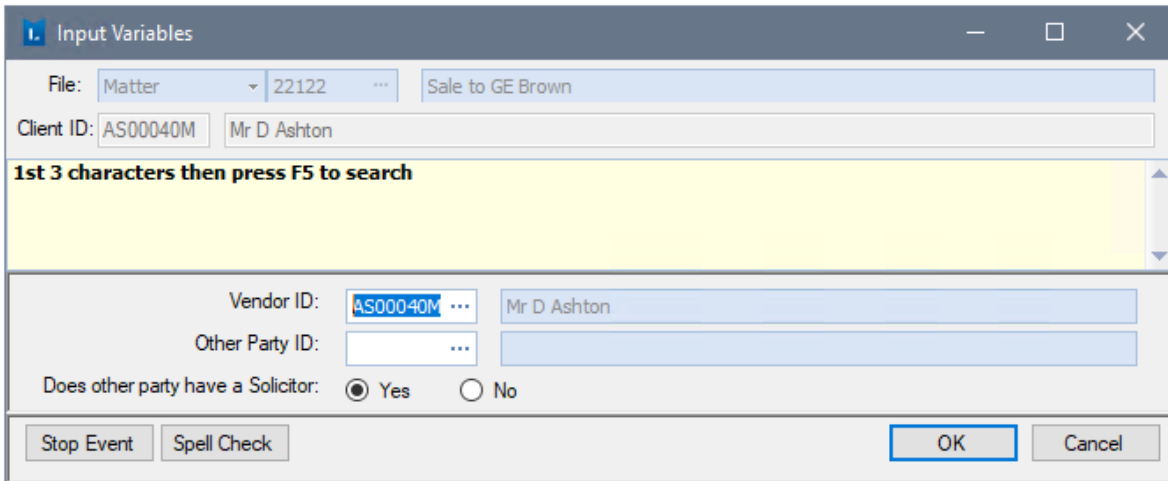


Figure 63

Follow the prompts, completing the relevant information as you proceed.

## Cabinets

Matter Toolbar → Cabinets

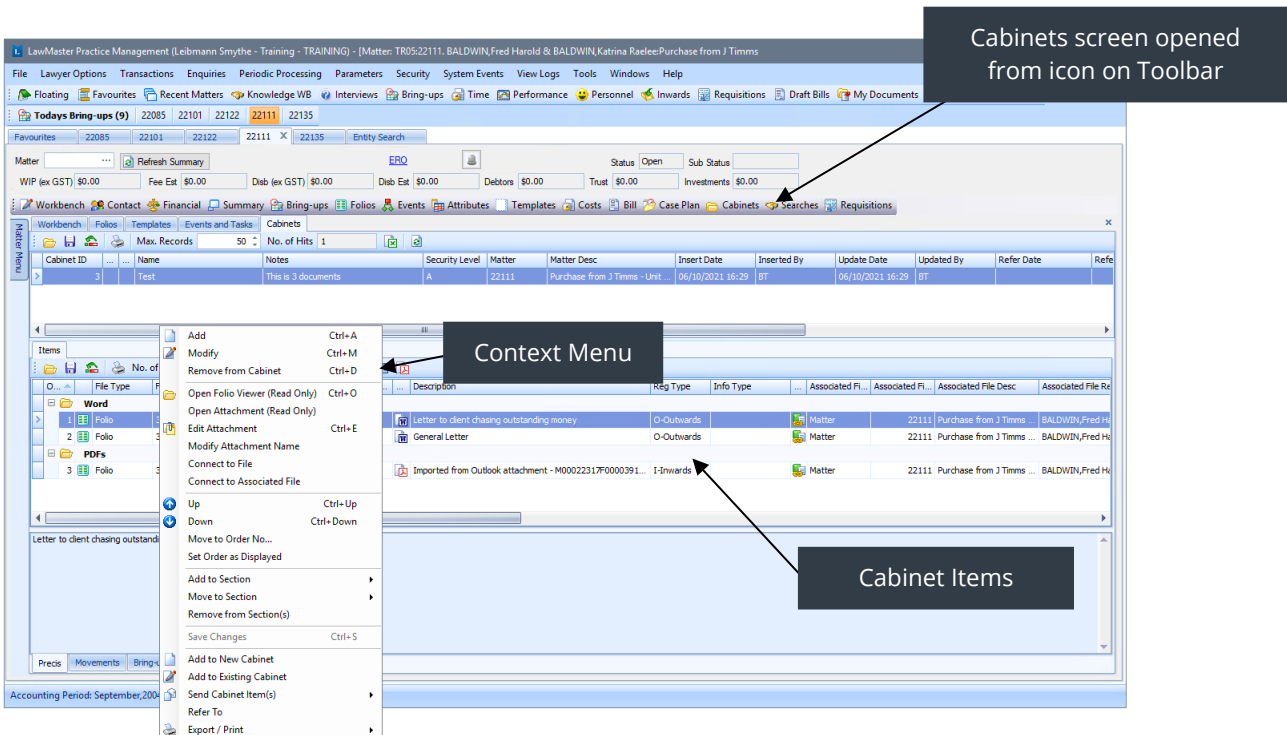


Figure 64

Cabinets are a tool used to gather a collection of related documents. Documents within cabinets can be arranged in your preferred order and can be output as a single document, optionally including an index for the page location of each individual document in the overall bundle.

Uses for cabinets include briefs, tender documents, evidence, property leasing – any place you need to have a collection of documents ready for export. Bundling your documents into cabinets allows you to easily reference, sort and output sets of documents.

LawMaster folios and attached documents may be added to cabinets from the various locations in LawMaster that folios appear.

Putting documents into cabinets does not move them from their original location, but creates a reference to the document from the cabinet. Changes made to the original document will be immediately visible when viewing them from the cabinet and will become part of any cabinet output created after the change has been made.

The cabinets window is split between the cabinet header in the top grid and the cabinet items in the bottom grid. See Figure 64.

As with other functions, the Cabinets button that appears in the Lawyer's Toolbar will show you a cross matter view of cabinets (created by the current user by default) and the Cabinets button in the Matter Toolbar will show only cabinets associated with the relevant matter.

## Adding a Cabinet

A cabinet can be created from the list of existing cabinets in the top pane of the cabinets tab via [Context Menu](#) → [Add](#).

Cabinets can also be created by starting out from any selection of folios from the standard folios view and using [Context Menu](#) → [Cabinets](#) then either [Add to New Cabinet](#) or [Add to Existing Cabinet](#).

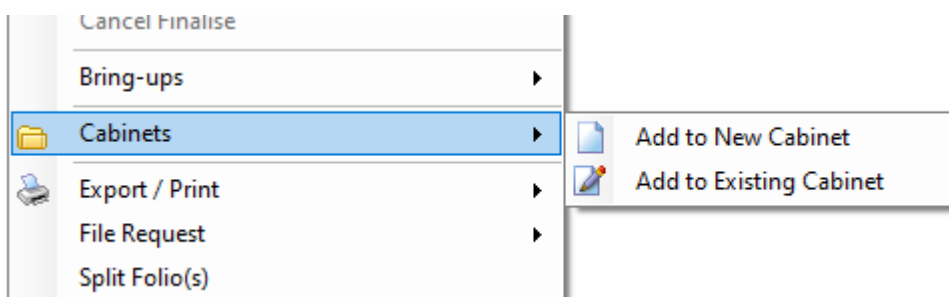


Figure 65

## Add Cabinet Items

In addition to adding folios directly to create a new cabinet as shown above, the following two options are also available:

- **Drag and Drop from Folios:** Select a folio or folios from the grid and drag to the cabinet tab until the tab activates, then move your cursor to the bottom grid and drop the item there.
- **Context Menu → Add.** This option will take you to a folio enquiry screen

## Changing the Order of Documents in a Cabinet

The default order in which documents appear in cabinets may not be the way in which you would like the documents presented. To move a document up or down in the list of items in a cabinet, select the item in the bottom panel of a cabinets view and use **Context Menu → Up** and **Context Menu → Down** as required. The keyboard shortcuts **Ctrl** + **↑** and **Ctrl** + **↓** are also available.

Other Context Menu items allow moving items to a specified position in the cabinet or to set the order as currently displayed.

## Creating Sections Within Cabinets

If you wish you divide your cabinets into different sections to further organise them, you can use the Sections functionality.

New sections are created by moving documents to a new section.

From the lower pane in a cabinets tab, use the context menu for the following actions.

- **Context Menu → Add to Section** - Allows the user to add the selected folio(s) to a new section or where the selected folio has an information type assigned to it, this menu option will be available, for example, if the information type description is 'Accounts', on selection, the folio(s) will be added to a Section labelled 'Accounts'.
- **Context Menu → Move to Section** - Provides a list of current Sections; upon selection, the selected folio will be added to that Section, if there are no folios remaining in a Section following a move, that Section is removed from the Cabinet. The keyboard shortcuts **Ctrl** + **↑** and **Ctrl** + **↓** are also available to move items between sections.
- **Context Menu → Remove From Section** - Allows the user to remove the selected folio(s) from the section and moves the selected folio(s) to the end of the unnamed Section.

## Saving Changes to Cabinet Items

Changes made to the items within a cabinet are saved as usual when saving the folio or editing a folio attachment, however changes to the order of items and section in a cabinet must be saved using the save button in the header of the lower pane of the Cabinets Tab. Note that this is the rightmost save icon that looks the same as the icon used to save the grid layout. LawMaster will also prompt you to save changes to your cabinet order when you navigate away from a cabinet.

## Exporting Cabinets

Cabinets are exported via the context menu in the top pane of the Cabinets Tab.

Individual items may also be exported from the list of items in the cabinet in the same way that folios may be exported, however if you want all features of cabinets to be available, you should export via the top pane.

There are 3 format options to output the documents within the cabinet:

1. Original - Documents are exported in the original file format, docx, jpeg etc.
2. PDF – Convert the files to PDF
3. PDF (Combined) – A published single PDF document. The documents will be placed in the same sequence and sections they appear within the cabinet items grid, including any selected options for page numbers, index page, save folio, folio type and output path.

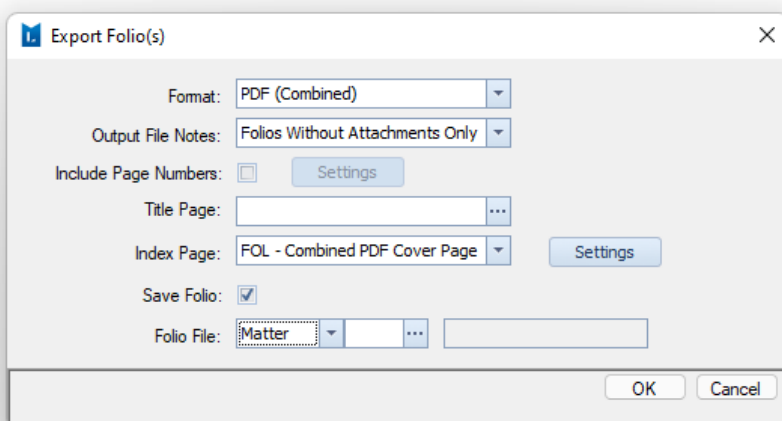


Figure 66

## File Referrals (Folios and Cabinets)

Referrals are a quick way to communicate documents internally between staff without creating unnecessary additional copies of the document.

A referral is simply an alert for another user that a document should be reviewed or have some other action taken with it. A referral links to the original document in LawMaster.

When a document has been referred to a user, they will see an alert appear in the alerts area below the Lawyer’s Toolbar as shown in Figure 67. As with other alerts, the flashing light icon will become a different icon once the alerts have been reviewed. Alerts for new referrals will appear based on the current schedule of the relevant alerts job.

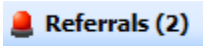


Figure 67

Any changes made to the referred documents are (once checked back in) immediately part of the original.

## Adding A Referral

Items are referred via [Context Menu](#) → [Refer To](#). The following screen will be shown for completion.

Figure 68

- Referred To – The user to which the item is being referred to. Multiple users may be added using a semi-colon between user ids. So they can later see the referral, the user may wish to also refer an item to themselves.
- Reason – Why the item is being referred selected from a pre-defined list.
- Priority- Low, Normal or High priority. Referrals default to a Normal priority. Priority is indicated in the grid in the 'Referral Priority' column by means of an icon. Normal priority referrals have no icon, High Priority referrals have a red exclamation and Low Priority referrals have a blue downwards pointing arrow.
- Letter of Instruction – You can link to a folio detailing instructions for the referral. This function is often omitted in favour of the simple remarks note below.
- Remarks – Free text details for the referral. The remarks section may be spell checked using the button to the left.
- Delivery Method – While usually left blank, this items might be used at the end of the referral process as a signal for the person sending the item externally how it should be sent (e.g. by post / email / fax etc).

## Viewing Referrals

Referrals can be viewed via the Referrals button in the Lawyer’s Toolbar. Use the context menu to access actions available for each referral.

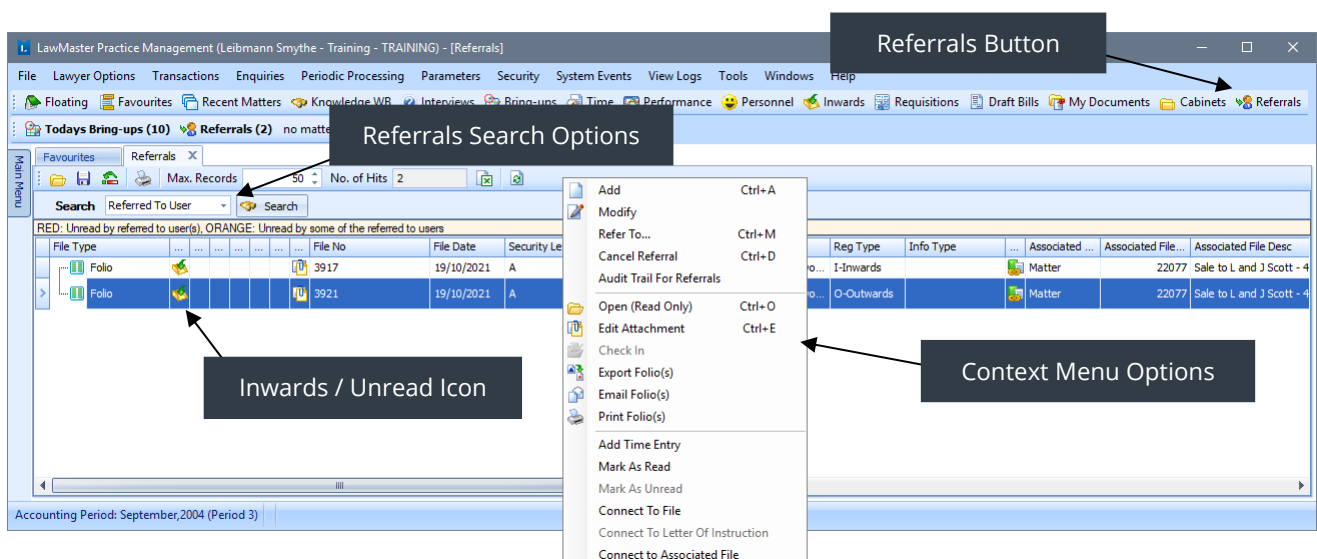


Figure 69

Each item referred is a link to the original folio and can be easily opened as read-only or for editing via the context menu options.

## Marking a Referral As Read

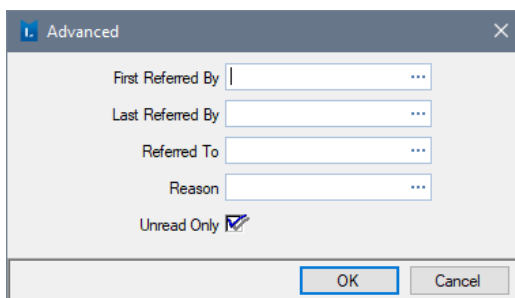
Marking a referral as read will mark the item as read by you and remove the inwards / unread icon from your grid view for that item.

## Modifying Referrals

The Modify item in the context menu relates to the target folio rather than the referral. To modify details for a referral, use the *Refer To* context menu option.

## Reviewing Referred Items

The default view in Referrals will show items that are referred **to** the current user. Use the advanced referral search options to change your view of referrals to show items you first referred, items with a specific reason or items unread that you have referred to others.



The image shows a dialog box titled "Advanced" with a close button (X) in the top right corner. It contains four search criteria, each with a text input field and a dropdown arrow (three dots): "First Referred By", "Last Referred By", "Referred To", and "Reason". Below these is a checkbox labeled "Unread Only" which is currently checked. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Figure 70

## Billing

It is possible to raise draft, interim and final bills on matters within LawMaster. To raise a bill, follow these steps:

- Search for matters ready for billing. From the Menu bar Click **Enquiries** → Click **Matter Search** → Select **Lawyer** from the **Search By** drop down box.
- Tick the **Matters with Unbilled Balances** box and enter the minimum amount of WIP and/or Disbursements e.g. 100
- The Matter Search grid will then return a list of matters that match this criteria.

Client Name	Matter No.	Matter Description	WIP Balance	Unbilled Dis...	Debtor Bala...	Trust Balance	Investment ...	Actual Fees	Estimated F...	Variance	Actual Cost ...	Fees Profit...	Disb Incurred	Estimated D...
BAKER, Laurence Willa...	22089	Sale to P and G Hamilton - 2...	\$42.00	\$0.91	\$0.00	\$0.00	\$0.00	\$142.00	\$0.00	\$142.00	\$0.00	\$142.00	\$0.91	\$0.00
EASTON, Colin William & ...	22098	Loan Agreement	\$84.00	\$0.00	\$0.00	\$0.00	\$0.00	\$84.00	\$0.00	\$84.00	\$0.00	\$84.00	\$0.00	\$0.00
ABEL, Matthew	22101	Loan Agreement	\$425.00	\$0.00	\$0.00	\$0.00	\$0.00	\$425.00	\$0.00	\$425.00	\$0.00	\$425.00	\$0.00	\$0.00
PARRAMATTA CITY CO...	22276	Valuation of Farming Land	\$700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$700.00	\$0.00	\$700.00	\$0.00	\$700.00	\$0.00	\$0.00
NSW RAIL	22277	Crown Land	\$620.00	\$0.00	\$0.00	\$0.00	\$0.00	\$620.00	\$0.00	\$620.00	\$0.00	\$620.00	\$0.00	\$0.00
REDLAND SHIRE	22278	Valuation of Lot 45	\$520.00	\$0.00	\$0.00	\$0.00	\$0.00	\$520.00	\$0.00	\$520.00	\$0.00	\$520.00	\$0.00	\$0.00
NATIONAL AUSTRALIA ...	22279	Valuation of Farming Land	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	\$0.00	\$400.00	\$0.00	\$400.00	\$0.00	\$0.00
SMITH, Alan	22310	Smith - Motor vehicle accide...	\$1,764.00	\$462.28	\$0.00	\$0.00	\$0.00	\$1,764.00	\$50,000.00	-\$48,236.00	\$0.00	\$1,764.00	\$462.28	\$0.00
SMITH, Edward Charles	22312	Smith - Motorcycle accident	\$1,050.00	\$2,818.18	\$0.00	\$0.00	\$0.00	\$1,050.00	\$5,000.00	-\$3,950.00	\$0.00	\$1,050.00	\$2,818.18	\$0.00
			\$5,605.00	\$3,281.37	\$0.00	\$0.00	\$0.00	\$5,705.00	\$55,000.00	-\$49,295.00	\$0.00	\$5,705.00	\$3,281.37	\$0.00

Figure 71

**Note:** Those matters that are coloured yellow, already have Draft Bills applied to them.

- Select the matter you wish to bill and **Right Click Context Menu** → Click **Open**.
- From the Matter Toolbar, Click **Costs** and review the cost transactions for the matter.
- If a cost transaction requires modification, select the transaction and **Right Click Context Menu** → Click **Modify**.
- If you need to add an overlooked transaction, **Right Click Context Menu** → Click **Input Cost Journal**.

- If a transaction has been entered incorrectly and needs to be removed, select the transaction and **Right Click Context Menu** → Click **Reverse Transactions**.
- If a transaction is not required for this bill, but is not to be reversed (and removed completely), select the transaction and **Right Click Context Menu** → Click **Exclude Transactions**.
- If you do not wish a transaction to appear on an itemised bill, select the transaction and **Right Click Context Menu** → Click **Hide Transaction**.
- Once all transactions are correct and ready for billing, either **Right Click Context Menu** → Click **Bill** OR from the Matter Toolbar Click **Bill**.

The screenshot shows the 'Bill Matter: 22101' window with the following details:

- Client ID:** AB0015... (dropdown) | **Mr M Abel** (text)
- Matter:** 22101 (dropdown) | **Loan Agreement** (text)
- WIP Fees:** \$425.00 | **WIP Disbursements:** \$0.00
- Firm Trust Funds:** \$0.00 | **Matter Charge Type:** Time based fees
- Estimated Fee:** \$0.00 | **Work Done:** \$425.00
- Previously Billed Fees:** \$0.00 | **Previously Billed Disbursements:** \$0.00
- Date of Bill:** 10/11/2021 (dropdown)
- Bill Fees upto:** 10/11/2021 (dropdown) | **Bill Disbursements upto:** 10/11/2021 (dropdown)
- Items to Bill:** All (dropdown)
- Bill Type:** Draft (dropdown)
- Bill Status:** Held (dropdown)
- Proposed Bill Amount Basis:** Per WIP Values (dropdown) | **Show Bill Total** (button)
- Proposed - Fee:** \$425.00 | **Includes GST?**  | **- Disb:** \$0.00
- Override trust credit amount:** \$0.00
- Bill Format:** BB (dropdown) | **General Narrative Bill** (text)
- Override Bill Number:** ... (dropdown)
- Billing Entity:** AB00159M (dropdown) | **Mr M Abel** (text)
- Instructions:** (text area)
- Bill Clause:** (text area)
- Options:**
  - Raise trust transfer?
  - Refund Trust funds to Client?
  - Print Trust Statement?
  - Round bill amount?
  - Merge Bill Form?
  - Activity Codes? Summarise Flag (dropdown)
- Toolbar:** Funds, Add Costs, Bill Costs, Review Bill, Reset, Unbilled, Save Draft Bill, OK, Cancel

Figure 72

- The Bill Matter screen must then be completed.

Field	Description
Date of Bill	Date to appear on the bill.
Bill Fees & Disbursements upto	Select if you want to bill fees or disbursements up to a certain date, e.g. you are doing the bill on the 2 <sup>nd</sup> day of the month and you only want to bill those transactions up to the last day of the previous month.
Items to Bill	Select the transaction type to be billed e.g. F – Fees A – All D - Disbursement D - Draft – i.e. merges a draft bill only and creates draft bill record. No invoice number is allocated.
Bill Type	I – Interim – i.e. bills all included transactions and allocates an invoice number. F – Final. This will bill all transactions whether or not they are excluded.
Bill Status	In the case of a draft bill: Held – Cost transactions will remain as unbilled. Reviewed – Bills cannot be released until they have a review flag has been assigned. Referred to accounts – for Accounts Department to process at a later stage. In the case of Interim or Final Bills – they will automatically be released, which will update Debtors.
Proposed Bill Amount Basis	Per WIP Values - bill the actual WIP Per Proposed Values – bill per the proposed values

**Field Description**

Outlines, based on the Proposed Bill Basis above, what is to be billed, and if applicable, any adjustments which need to be raised (automatically) to achieve the proposed values.

Per WIP Values

Actual	
Fees:	\$425.00
Fees W/O:	\$0.00
* Disbursements:	\$0.00
Disbursements W/O:	\$0.00
GST:	\$42.50
* Total (not rounded):	\$467.50
* Excluding Auto Disbursements charge	

Close

Show Bill Total

Per Proposed Values

	Actual	Proposed	
Fees:	\$425.00		
Fees W/O:	\$0.00	\$0.00	(Additional)
* Disbursements:	\$0.00		
Disbursements W/O:	\$0.00	\$0.00	(Additional)
GST:	\$42.50	\$42.50	
* Total (not rounded):	\$467.50	\$467.50	
* Excluding Auto Disbursements charge			

Close

Proposed – Fee  
 Proposed – Disb  
 Include GST

Fees to be billed, irrespective of WIP – Fees  
 Disbursements to be billed, irrespective of WIP – Disbursements  
 Do the proposed Values include GST

Field	Description
Override Trust Credit Amount	<p>The Override Trust Credit amount field in billing screen defaults to \$0.00. If Raise Trust Transfer is checked then Override trust credit amount cannot be zero and must be entered as a negative amount.</p> <p>If a draft bill is saved with an amount in the Override trust credit amount field the value will always be displayed.</p> <p>If a trust credit amount is specified, LawMaster will adjust this value automatically if the trust credit is greater than the total of the bill i.e. LawMaster will not allow a credit greater than the value of the bill.</p>
Bill Format	Select the WP form to be used for producing the bill.
Billing Entity	The billing entity will automatically be completed with the Client's details or if a Billing Entity was specified on the matter, there details will be entered. This can be overridden if required.
Override bill number	Only used if you want to add additional information to bill or if you are billing a zero amount to another bill.
Billing Entity	This is the entity to which the bill is directed. It may be overridden.
Instructions	Type in details if you want to give instructions to accounts.
Bill Clause	Update billing clause to appear as narrative on the bill. Standard clauses are available from the Search button to the right of the field.
Raise Trust Transfer	If ticked, LawMaster will perform the trust transfer to bill amount, in order of disbursement followed by fees.
Refund Trust Funds to Client	If ticked, LawMaster will raise a trust voucher to client for the balance of funds held in trust (after trust transfer) including Funds that are not recorded as Firm Funds.
Print Trust Statement	If ticked, LawMaster will print a Trust Statement. LawMaster will automatically tick this field if trust transactions have been added since the matter was opened OR the last bill was produced, whichever is the later date.
Funds	This allows you to check the funds held in Trust for this matter.
Add Costs	Add a cost transaction.
Bill Costs	Review the cost transactions for the matter.
Review Bill	Allows you to review the breakdown of fees and disbursements including GST you can also write on/off fees in this area
Reset	Resets the billing details to TODAY.
Unbilled	Unbilled Fees and Disbursements are displayed with GST component to indicate Total Fees and Disbursements including GST.
Save Draft Bill	Save the details of your bill to come back to later.
OK	Raises the bill.

Field	Description
Cancel	Cancel the raising of the bill.

- When all details have been entered, [Click OK](#).

## Closing/Archiving Matters

The following steps should be followed when closing/archiving a matter.

### 1. Pre-Close File Check

Matter Menu → Matter → Pre-Close File Check.

This will advise if there are any outstanding items which may prevent the file from being closed. Details of these items are then returned in the grid, and must be cleared to enable the matter to be closed.

### 2. Close/Archive Matter

Matter Menu → Matter → Close/Archive Matter.


Enter the archive location, disposal schedule, review date and destroy date. The status of the matter will then be set to Closed.

Once a matter is closed you can still generate letters / documents but are unable to write any cost transactions. If you want to enter time, you will need to Re-open the matter.

Matter Menu → Matter → Re-Open Closed Matter.

The matter will now be available to continue working on.

## Logging Off LawMaster

In order to exit LawMaster, click on the  which appears in the top right hand corner of the screen. Users will then be given the following prompt to ensure they really do wish to exit:

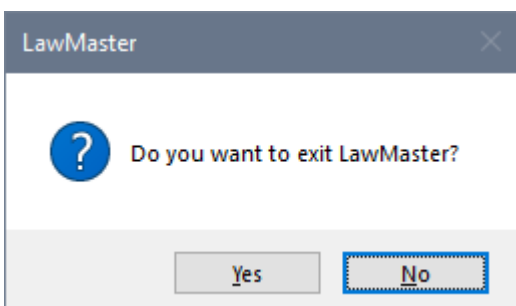









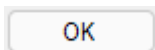
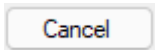



Figure 73

## Function Keys

- |   |  |
|---|--|
|    | Help   |
|    | Go (Will select the OK or Save button within a screen)   |
|    | When using 1 character codes for standard clauses in File Note field, Time and Disbursement details of Matter Workbench F3 will insert the text of standard clause (as with previous version).   |
|    | Lookup (In any field which has the  icon the F5 key can be used to present the lookup rather than clicking this icon with mouse)<br><br>When used in Disbursement Details Narration fields will insert what is in Time Details Narration. |
|  | When used in Time and Disbursement Narration fields will insert the first sentence of file note.   |
|  | When used in the File Note, Time and Disbursement Narration fields this invokes Spell Check.   |
|  | When used in Time and Disbursement Details Narration fields will insert the whole file note.   |
|  | Cancel/Close window  |

## Window Buttons

- |   |                                      |
|---|--------------------------------------|
|  | Saves changes and closes window      |
|  | Closes window without saving changes |
|  | Saves changes and leaves window open |