



2B-LAW 365
Legal Software. **Simplified.**

USER GUIDE

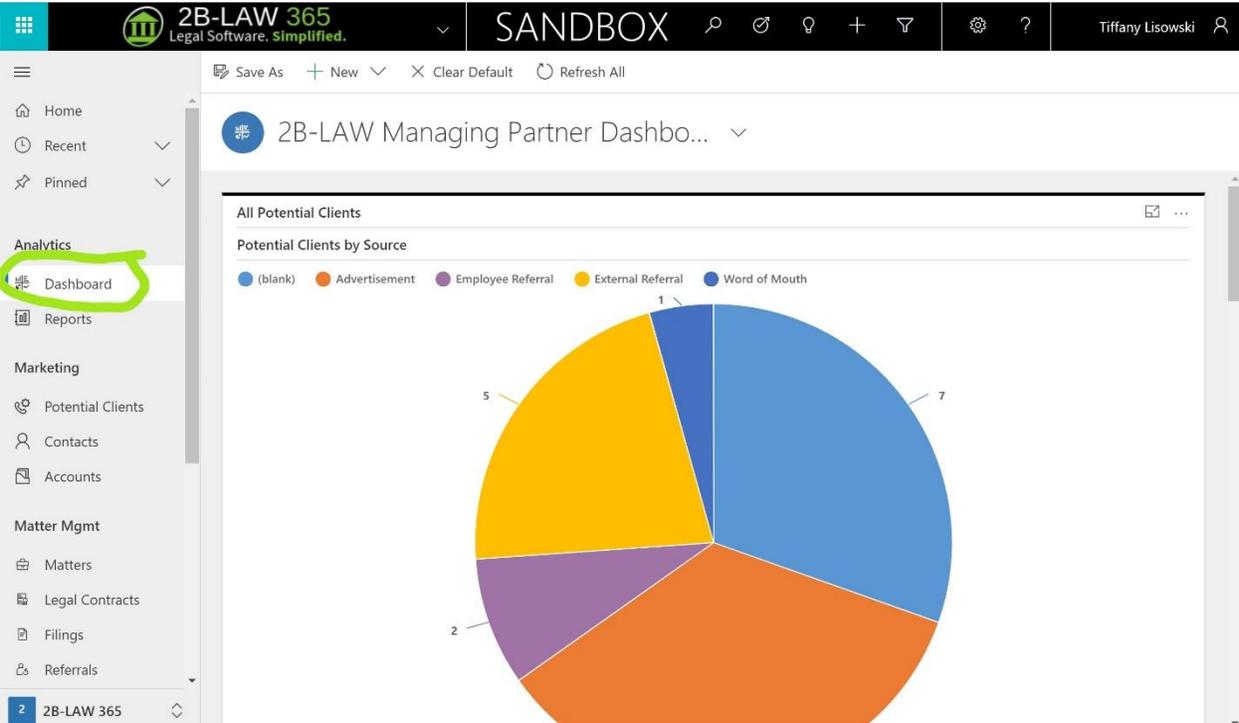
for Microsoft Dynamics 365 Unified
Interface

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DASHBOARDS - 2B-LAW 365

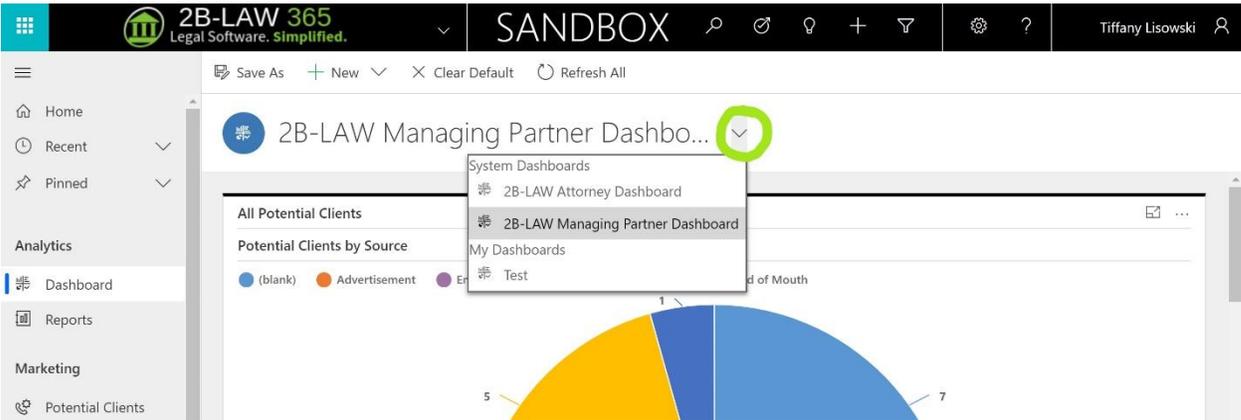
Several custom Dashboards are available within 2B-LAW. For more information, see [Create and Edit Dashboards](#).

1. Navigate to 2B-LAW → Analytics → Dashboards



2. Scroll down to see all Dashboard information. The Managing Partner Dashboard shows information on lead sources, number of cases assigned to an attorney, types of active cases and all time entered by week.

3. To see other available Dashboards, click on the drop-down arrow to the right of "Managing Partner Dashboard".



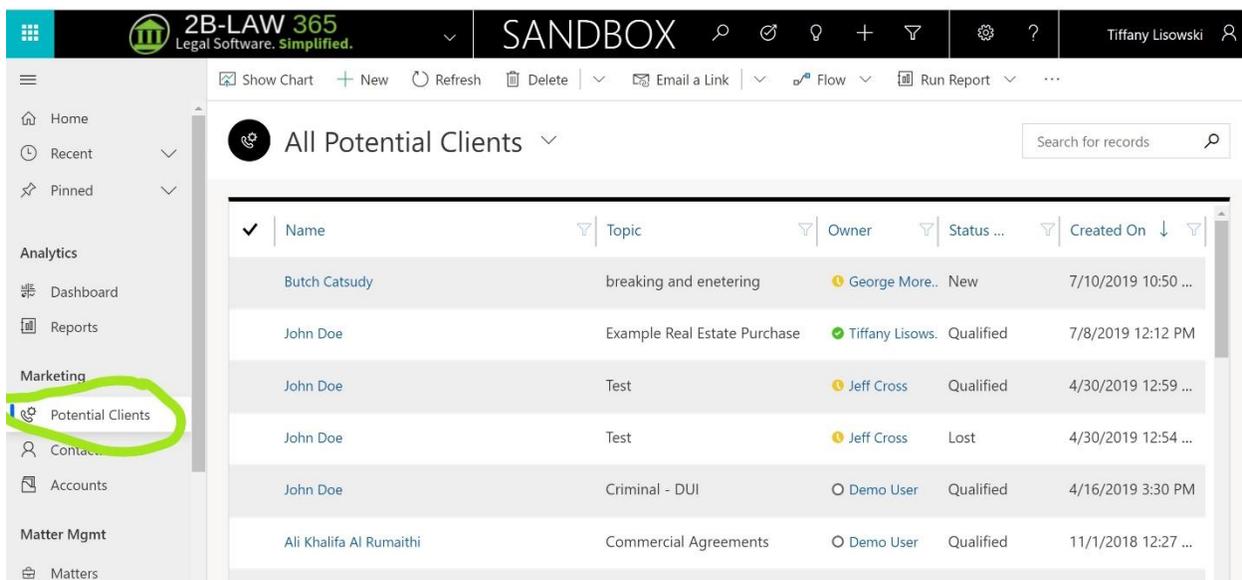
NAVIGATING THE MARKETING SECTION OF 2B-LAW 365

Creating a New Potential Client

When a potential client contacts the firm, you will want to capture all the relevant information within Potential Client.

HINT: A lot of same functionality of Leads within Dynamics 365 also applies to Potential Clients. See [Create and Edit Sales Leads](#) for more information.

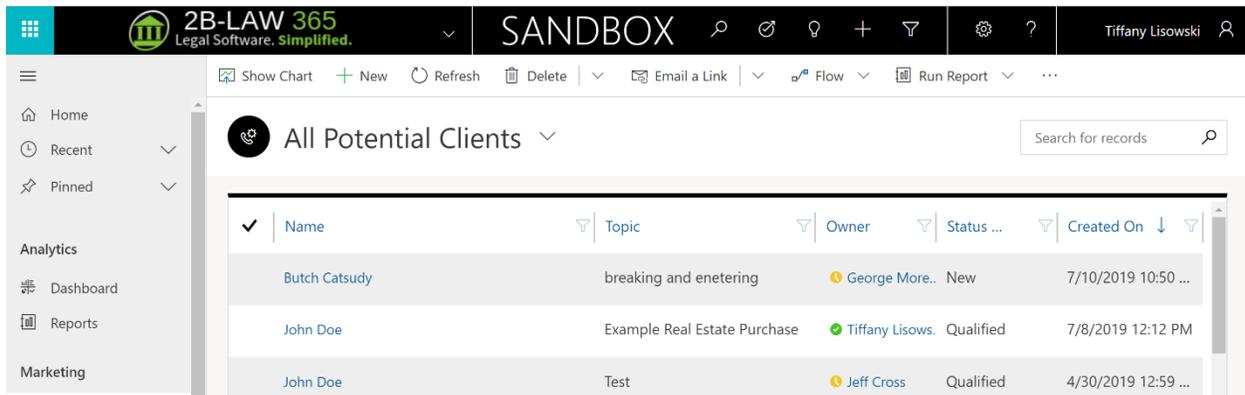
1. Navigate to 2B-LAW → Marketing → Potential Client. After choosing Potential Client, you will see a view of all Potential Clients.



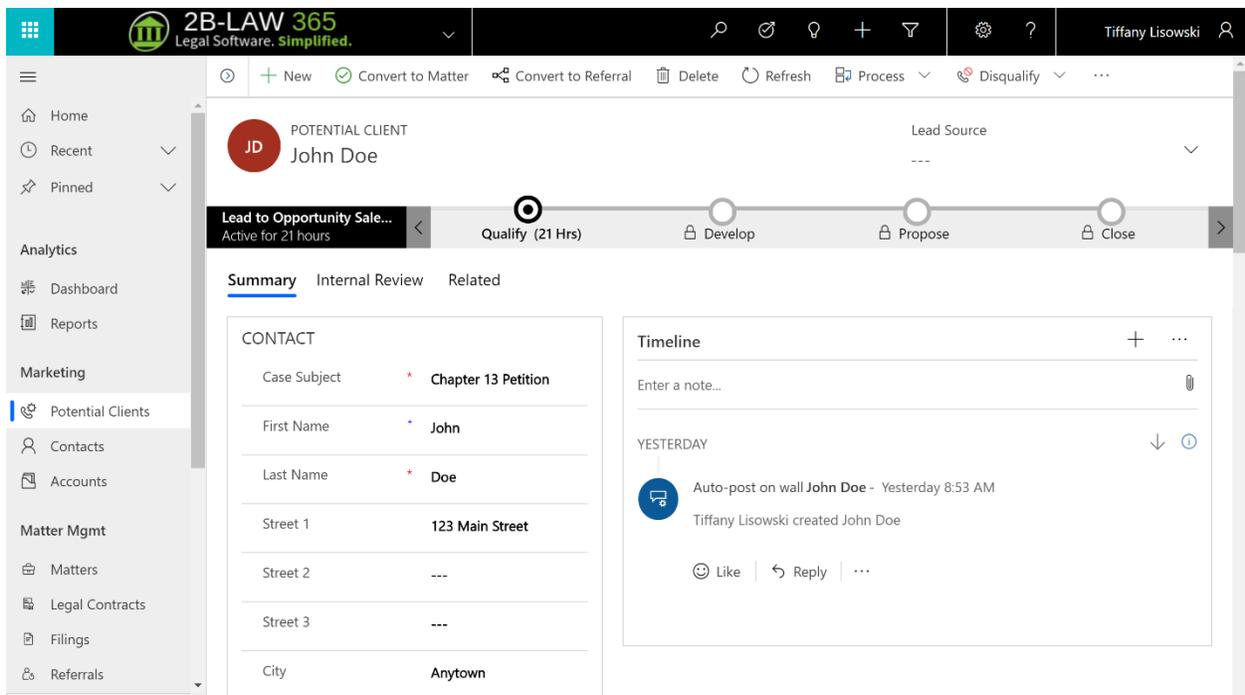
The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes the 2B-LAW 365 logo, the text 'Legal Software. Simplified.', and a 'SANDBOX' environment indicator. The left navigation pane is visible, with 'Marketing' and 'Potential Clients' highlighted. The main content area displays a table titled 'All Potential Clients' with a search bar and a '+ New' button. The table contains the following data:

Name	Topic	Owner	Status	Created On
Butch Catsudy	breaking and enetering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 12:12 PM
John Doe	Test	Jeff Cross	Qualified	4/30/2019 12:59 ...
John Doe	Test	Jeff Cross	Lost	4/30/2019 12:54 ...
John Doe	Criminal - DUI	Demo User	Qualified	4/16/2019 3:30 PM
Ali Khalifa Al Rumaithi	Commercial Agreements	Demo User	Qualified	11/1/2018 12:27 ...

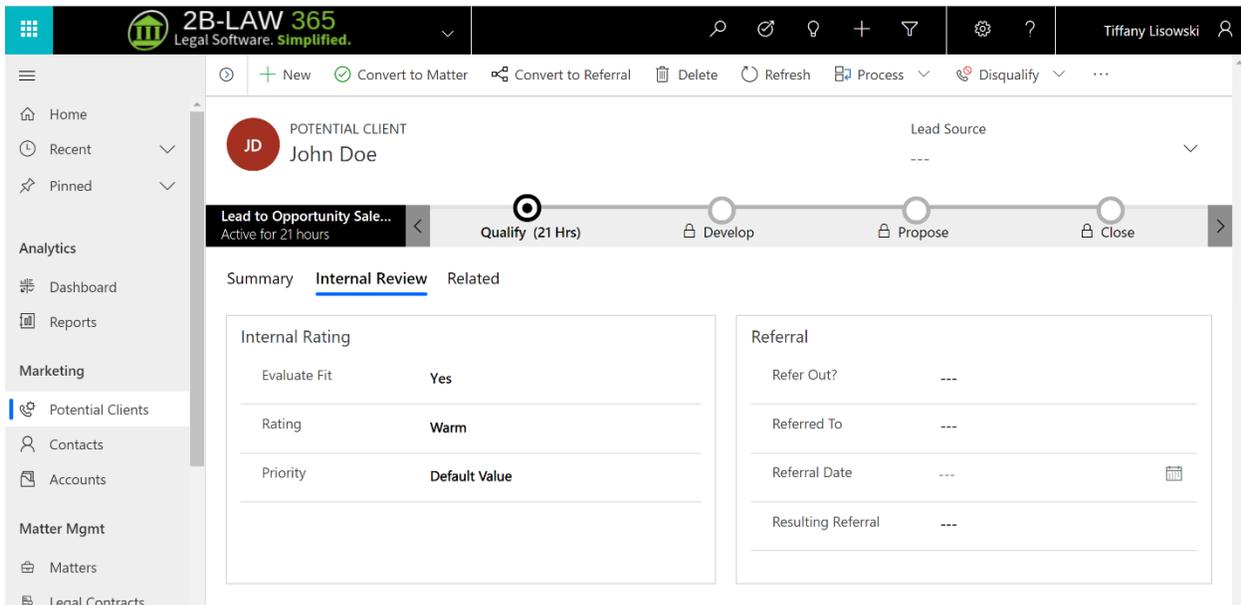
2. Choose +New to add a new Potential Client.



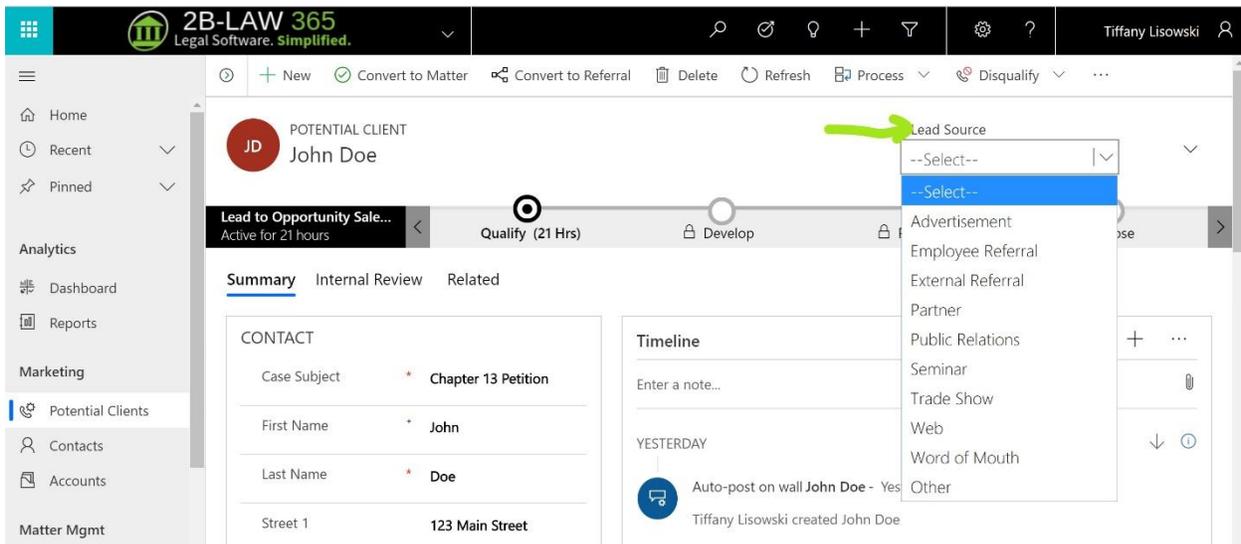
3. Add information on Potential Client.



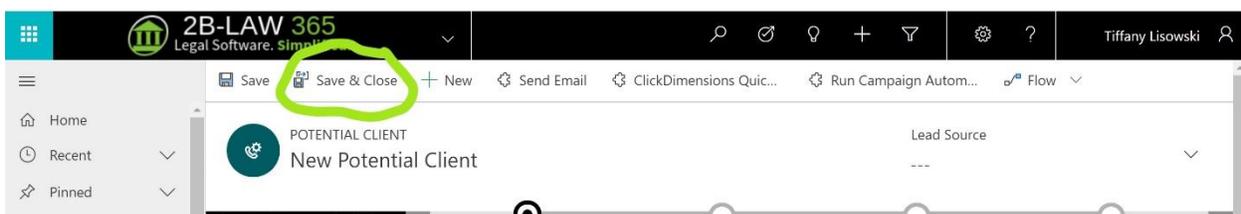
- Most demographical information can be found under the Summary section seen above.
- To capture information on whether the Potential Client is a good fit for the firm or if the Potential Client will be referred to another firm, click on “Internal Review”.



- To track the source of a new Potential Client, use the “Lead Source” field on the top of the page. This information can be used to create Dashboards and Reports showing leads by source.



- Once all pertinent information on the Potential Client has been entered, do not forget to click “Save” or “Save & Close”.



6. **NOTE:** If no company information is entered, the “Client Type” field will read “Individual”. If company information is entered for the Potential Client, the “Client Type” can be either an individual or a company.

The screenshot displays the 2B-LAW 365 software interface. The top navigation bar includes the logo and name '2B-LAW 365 Legal Software. Simplified.' and a user profile for 'Tiffany Lisowski'. A secondary toolbar contains actions like '+ New', 'Convert to Matter', 'Convert to Referral', 'Delete', 'Refresh', 'Process', and 'Disqualify'. The main content area shows a lead profile for 'John Doe' with a status of 'Lead to Opportunity Sale...' and 'Active for 21 hours'. A progress bar indicates stages: 'Qualify (21 Hrs)', 'Develop', 'Propose', and 'Close'. Below this, a 'Summary' tab is active, showing a table of lead details:

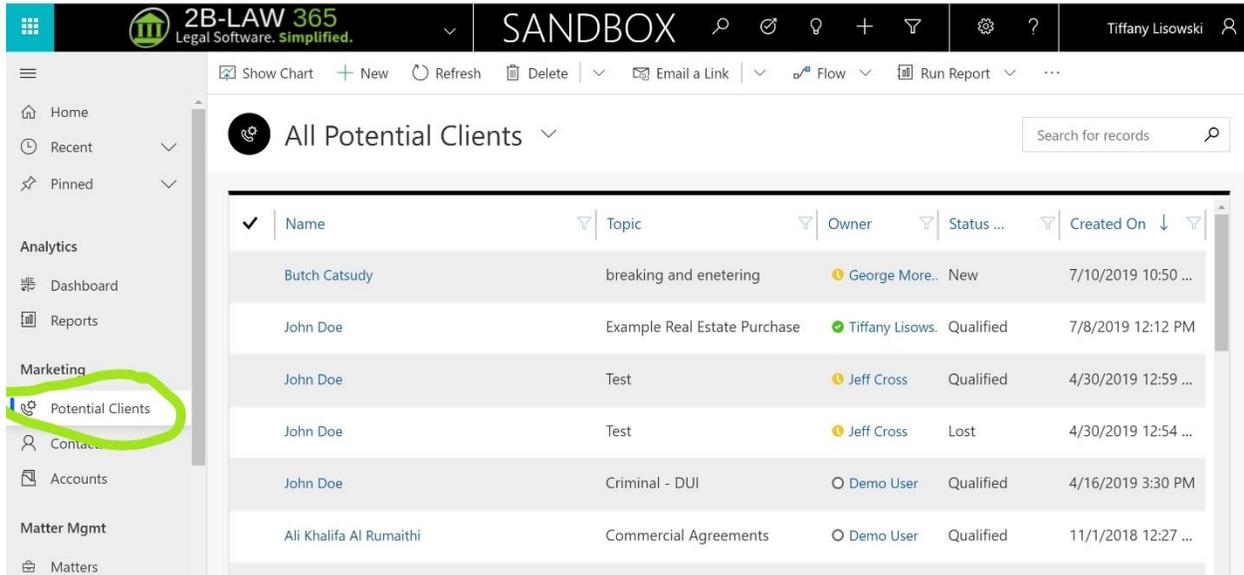
Resulting Matter	---
Lead Source	---
Client Type	Individual

The 'Client Type' field and its value 'Individual' are circled in green.

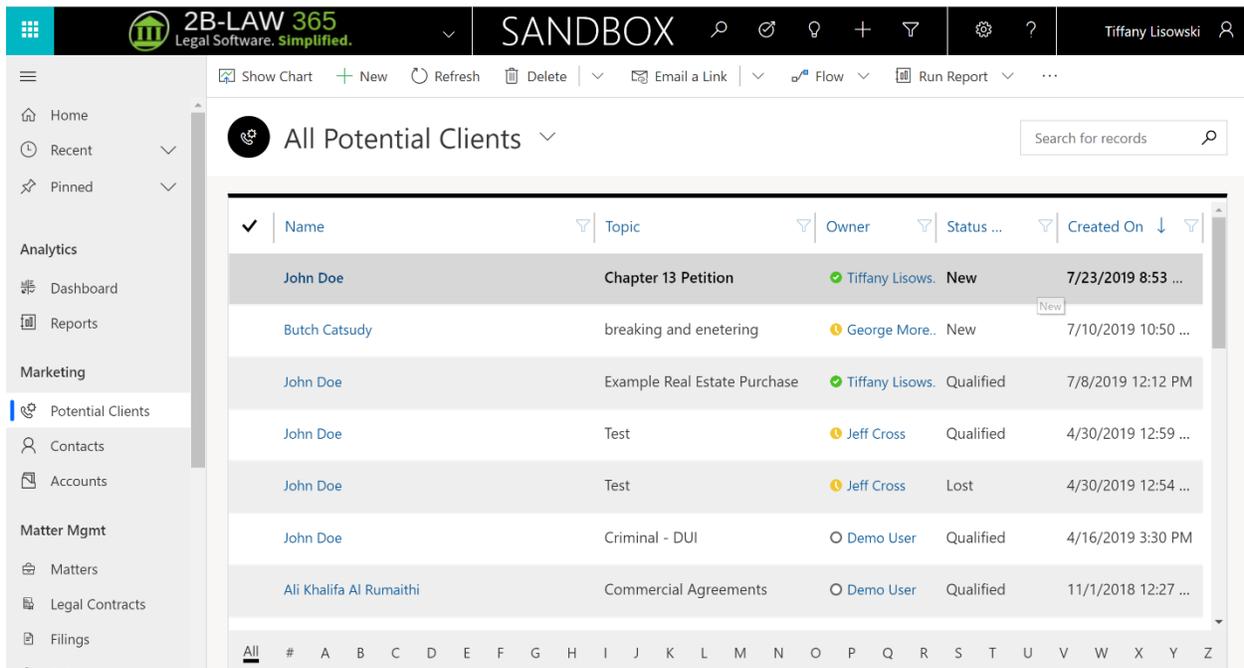
Convert a Potential Client into an Active Matter

When a Potential Client opts to retain the firm's services, you can convert the information into a new active Matter easily.

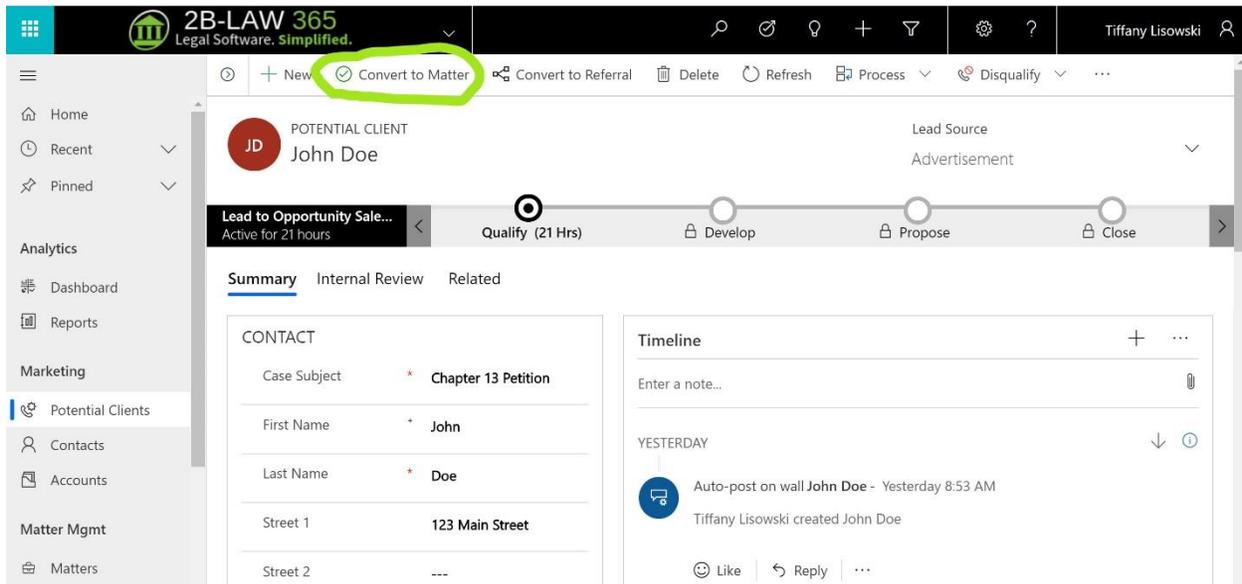
1. Navigate to 2B-LAW → Marketing → Potential Client



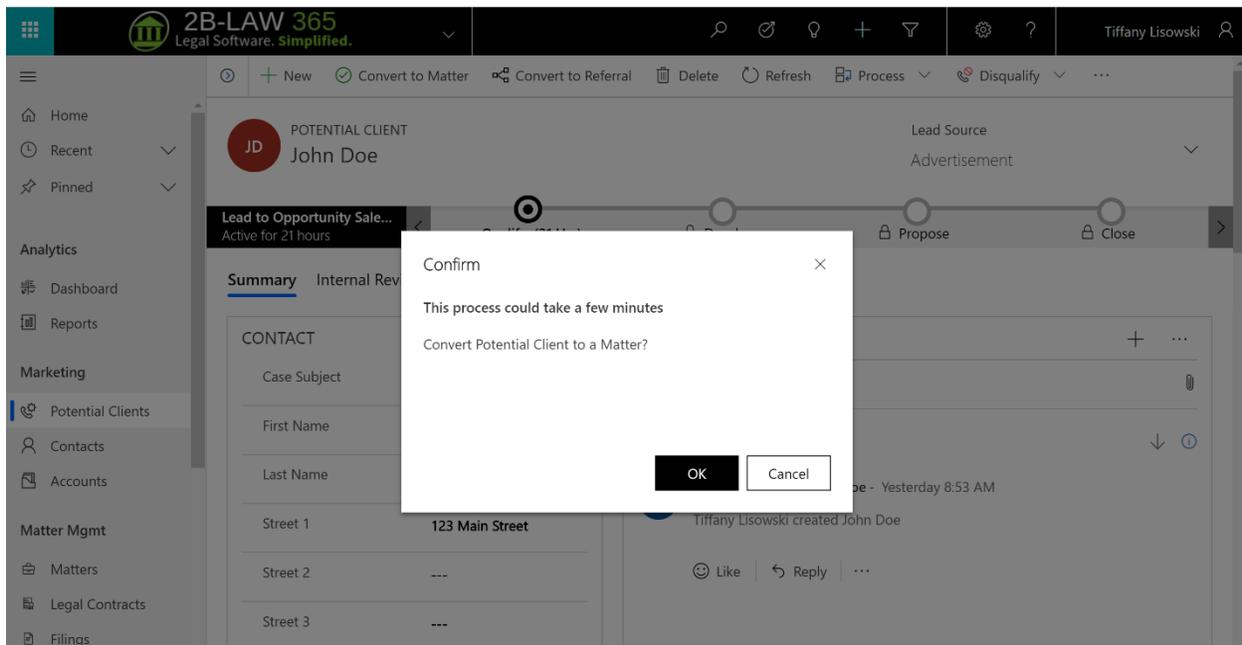
2. From the Potential Client view, choose the Potential Client and double-click or search for the Potential Client using the Search for Records option.



3. Once inside of the Potential Client record, simply click “Convert to Matter”.



4. When asked to confirm, click okay (or cancel if you have reached this step in error).



5. A new screen will pop up showing the Matter created. *If the Matter screen does not appear, please check your pop-up blocker settings.* A new Matter has been created. Please note: 2B-LAW automatically assigns a unique Matter Number and a Name, which is formatted as Client Name. The Client Name can be either an individual or company depending on the Client Type selected when the Potential Client was created (See Creating a New Potential Client).

NOTE: When a Potential Client is converted to a Matter, a Contact will be created from the Potential Client “Name” field. If the Potential Client is a company, an Account will be created from the “Company” field.

The screenshot displays the 2B-LAW 365 software interface. The top navigation bar includes the logo, the text "2B-LAW 365 Legal Software. Simplified.", and the current user "Tiffany Lisowski". The left sidebar contains a menu with categories: Home, Recent, Pinned, Analytics (Dashboard, Reports), Marketing (Potential Clients, Contacts, Accounts), Matter Mgmt (Matters, Legal Contracts, Filings, Referrals), and a bottom bar with "2B-LAW 365". The main content area shows a matter record for "John Doe" with tabs for Summary, Connections, Docket, Trust Ledger, Outcome, and Related. The Summary tab is active, displaying fields: Status (Active), Won or Lost (---), Matter Number (MAT-190724-01032), Modified On (7/24/2019 6:45 AM), and Modified By (Tiffany Lisowski). Below this is a "CASE INFORMATION" section with fields: Client (John Doe), Name (John Doe), and Matter Number (MAT-190724-01032). A right-hand sidebar contains a "Close" button and a "+" icon. A tooltip at the bottom right of the main content area reads "Sorted in descending order. Select to change sort order".

Convert a Potential Client into a Referral

There may be a time when a new Potential Client is not a good fit for a firm. In cases where referrals to outside counsel are needed, a Potential Client can be converted into a Referral. This allows the tracking of the Referral, including tracking any referral fees owed to the firm.

1. Navigate to 2B-LAW → Marketing → Potential Client

The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes the logo, '2B-LAW 365 Legal Software. Simplified.', 'SANDBOX', and the user name 'Tiffany Lisowski'. The left sidebar contains a navigation menu with 'Marketing' highlighted. Under 'Marketing', 'Potential Clients' is circled in green. The main content area displays a table titled 'All Potential Clients' with a search bar and a table of records.

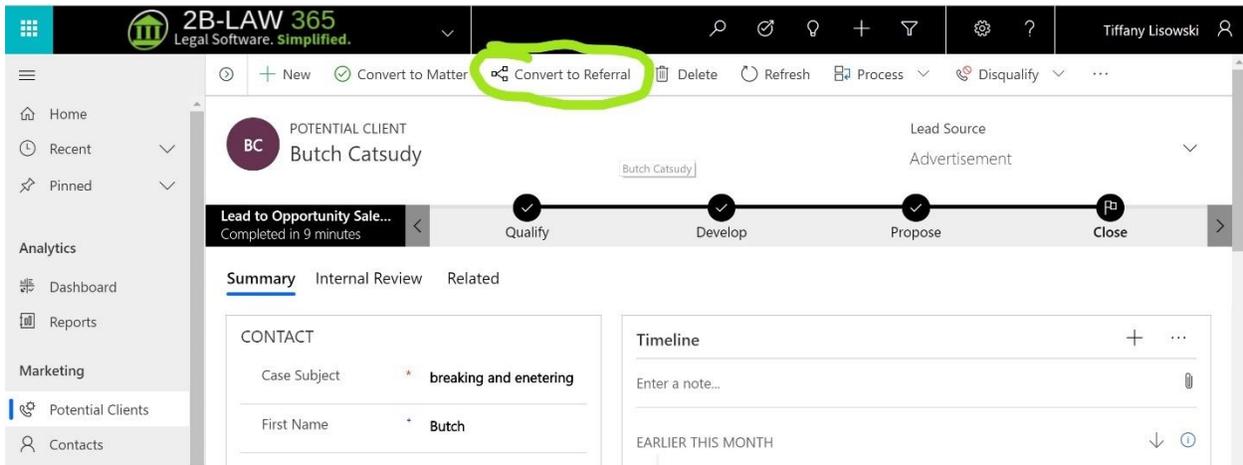
Name	Topic	Owner	Status	Created On
Butch Catsudy	breaking and enetering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 12:12 PM
John Doe	Test	Jeff Cross	Qualified	4/30/2019 12:59 ...
John Doe	Test	Jeff Cross	Lost	4/30/2019 12:54 ...
John Doe	Criminal - DUI	Demo User	Qualified	4/16/2019 3:30 PM
Ali Khalifa Al Rumaithi	Commercial Agreements	Demo User	Qualified	11/1/2018 12:27 ...

2. From the Potential Client view, choose the Potential Client and double-click or search for the Potential Client using the Search for Records option.

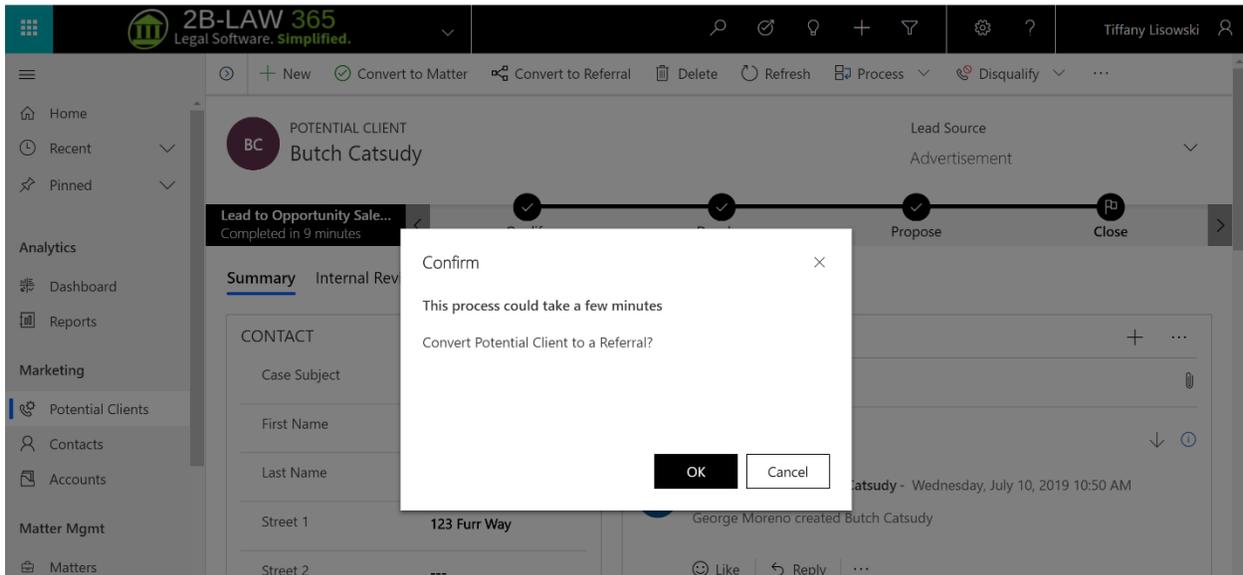
The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes the logo, '2B-LAW 365 Legal Software. Simplified.', 'SANDBOX', and the user name 'Tiffany Lisowski'. The left sidebar contains a navigation menu with 'Marketing' highlighted. Under 'Marketing', 'Potential Clients' is selected. The main content area displays a table titled 'All Potential Clients' with a search bar and a table of records. The 'John Doe' record with the topic 'Chapter 13 Petition' is highlighted.

Name	Topic	Owner	Status	Created On
John Doe	Chapter 13 Petition	Tiffany Lisows.	New	7/23/2019 8:53 ...
Butch Catsudy	breaking and enetering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 12:12 PM
John Doe	Test	Jeff Cross	Qualified	4/30/2019 12:59 ...
John Doe	Test	Jeff Cross	Lost	4/30/2019 12:54 ...
John Doe	Criminal - DUI	Demo User	Qualified	4/16/2019 3:30 PM
Ali Khalifa Al Rumaithi	Commercial Agreements	Demo User	Qualified	11/1/2018 12:27 ...

3. Once inside of the Potential Client record, simply click “Convert to Referral”.



4. You will be asked to Confirm. Click Okay.



5. A “Referral” record has been created for the Potential Client. *If the record did not automatically pop-up, please check your pop-up blocker settings.* Here, all the pertinent referral information can be entered.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

+ New Deactivate Delete Refresh Assign Share Email a Link

REFERRAL
Butch Catsudy - Criminal

General Outcome Related

Status Reason
Pending

Status

Active

Created On
7/25/2019 8:42 AM

Created By
Tiffany Lisow...

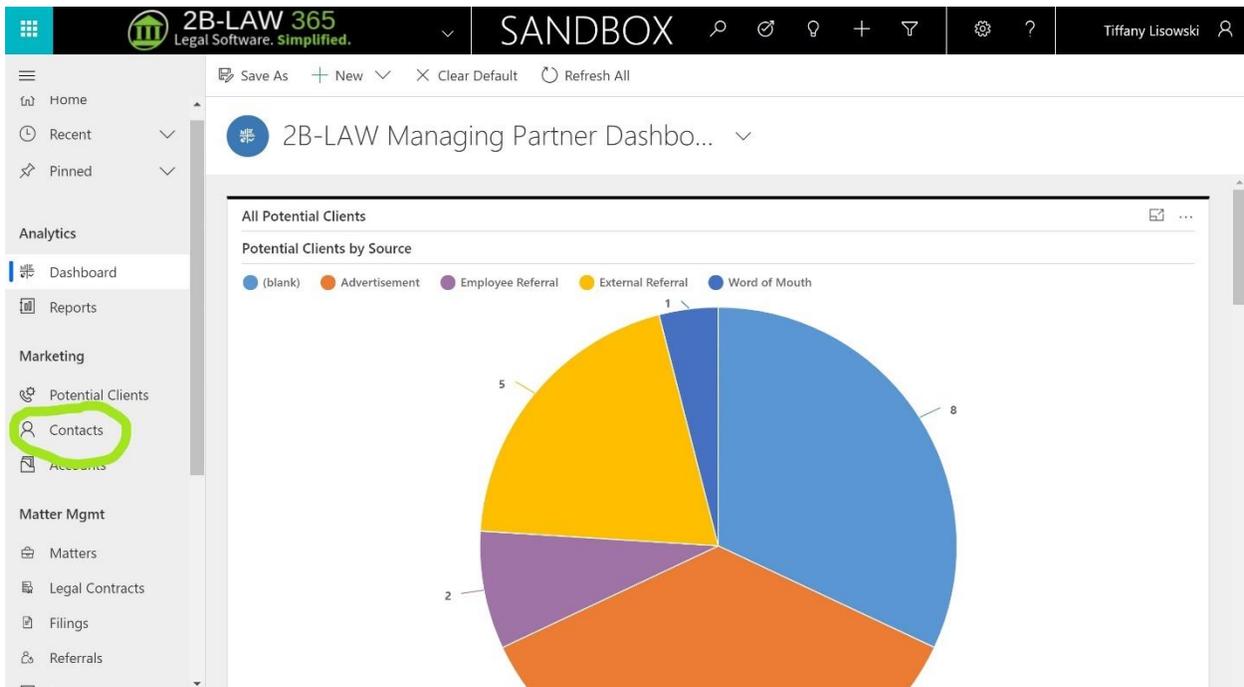
Modified On
7/25/2019

Timeline
Enter a note...
No records to show.

Creating New Contacts

A Contact can be any person whose contact information you need to store. Whether it is a client, opposing counsel, judge or a clerk, the information can be entered under Contact. *Accounts is native within Dynamics 365. See [Accounts and Contacts](#) for tips and instructions.*

1. Navigate to 2B-LAW → Marketing → Contact



2. Within Contacts, the default view shows all Active Contacts.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Contacts Subgrid View

Search for records

✓	Full Name	Email
	Ali Khalifa Al Rumaithi	---
	Ali Khalifa Al Rumaithi	---
	Ali Khalifa Al Rumaithi	ak@dmc.ae
	Ali Khalifa Al Rumaithi	---
	Anthony Avery (Sample)	ant@email.com
	Anthony Avery (Sample)	ant@email.com
	Anthony Avery (Sample)	ant@email.com

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

3. To enter a new Contact record, click +NEW.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Contacts Subgrid View

Search for records

✓	Full Name	Email
	Ali Khalifa Al Rumaithi	---
	Ali Khalifa Al Rumaithi	---
	Ali Khalifa Al Rumaithi	ak@dmc.ae

4. Enter Contact information. SAVE!

2B-LAW 365
Legal Software. Simplified.

Save Save & Close + New Send Email ClickDimensions Quic... Run Campaign Autom... Flow

CONTACT
New Contact

Owner
Tiffany Lisowski

Summary Details

CONTACT INFORMATION	
First Name	Tiffany
Last Name	Roberts
Job Title	Sales Manager
Company Name	Acme Co.
Relationship Type	Other
Email	tiffany@2bsolutio...
Home Phone	---
Mobile Phone	205-215-7404

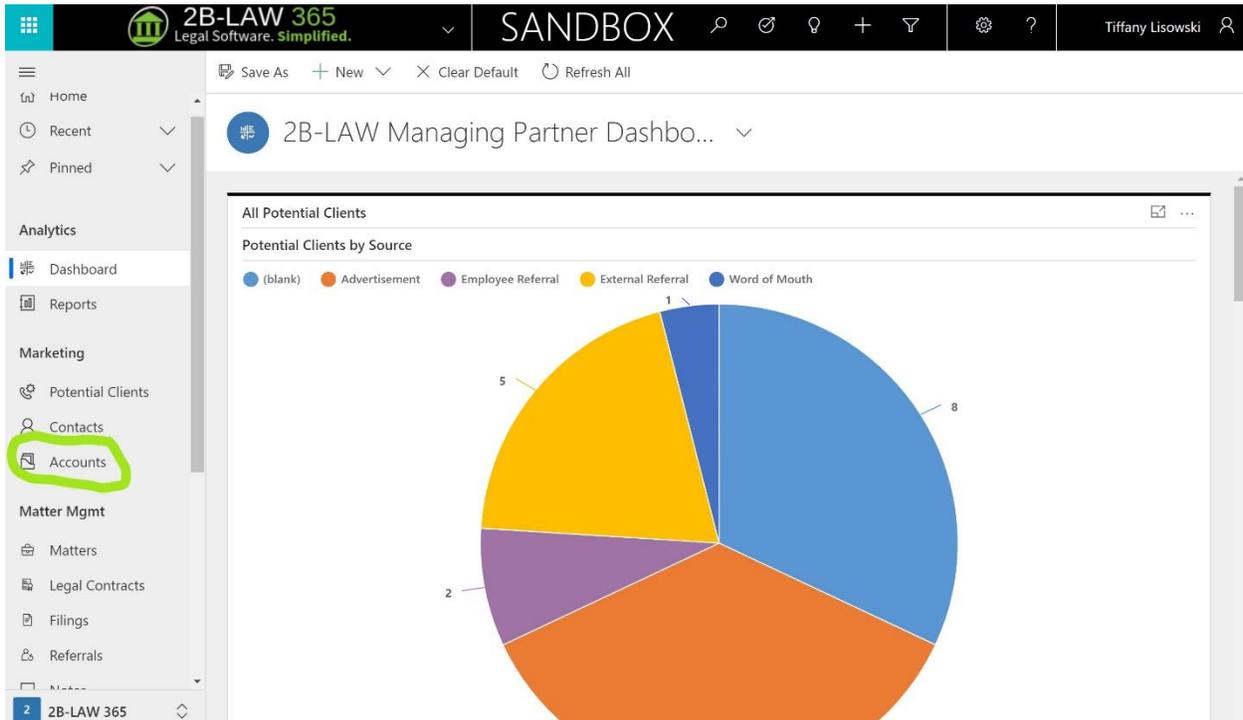
Timeline

This record hasn't been created yet. To view this record, save it to your timeline.

Creating Account Records

An Account can be created to track information regarding any group (company, firm, court, etc.) which may have multiple contacts. *The Account entity is native to Dynamics 365. For more information on the functionality of Accounts, see [Accounts and Contacts](#).*

1. Navigate to 2B-LAW → Marketing → Account



2. Within Accounts, the default view shows Active Accounts.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

My Active Accounts

Search for records

Account Name	Main Ph...	Address...	Primary Contact	Email (Primary ...)
ABC Real Estate	555-555-9999	---	---	---
Acme Co.	---	---	---	---
Acme Corp.	---	---	---	---
McDonald's	555-999-9999	Birmingham	---	---

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 4 of 4 (0 selected)

3. To enter a new Account, click +NEW.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

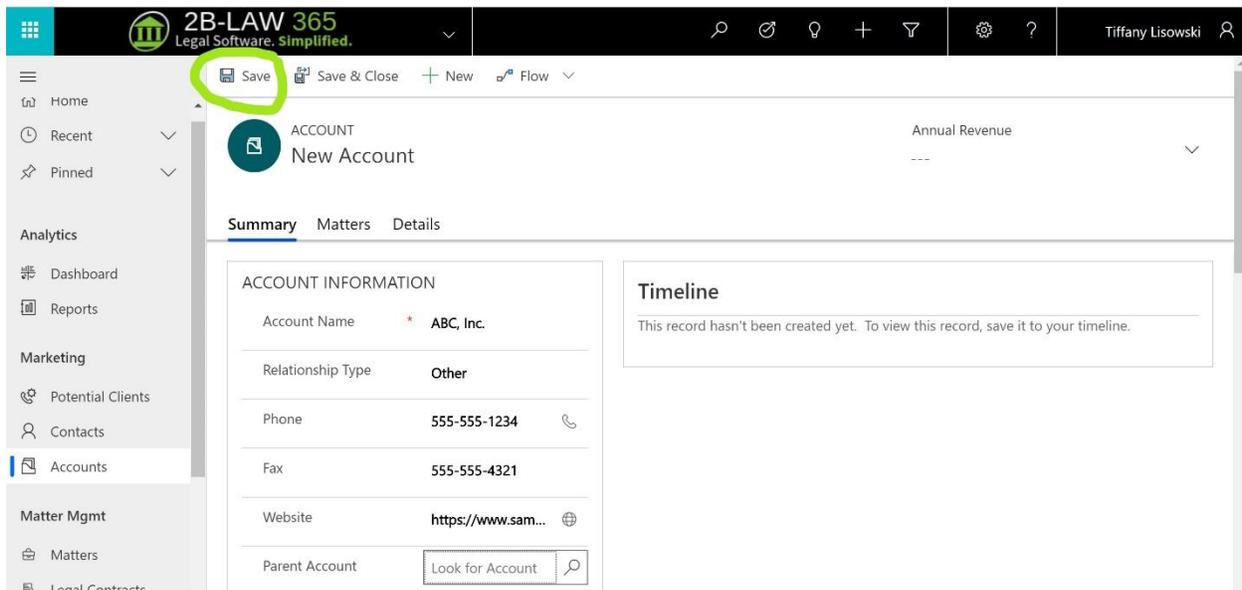
Show Chart **+ New** Delete Refresh Email a Link Flow Run Report

My Active Accounts

Search for records

Account Name	Main Ph...	Address...	Primary Contact	Email (Primary ...)
ABC Real Estate	555-555-9999	---	---	---
Acme Co.	---	---	---	---
Acme Corp.	---	---	---	---
McDonald's	555-999-9999	Birmingham	---	---

4. Enter Account information and SAVE.



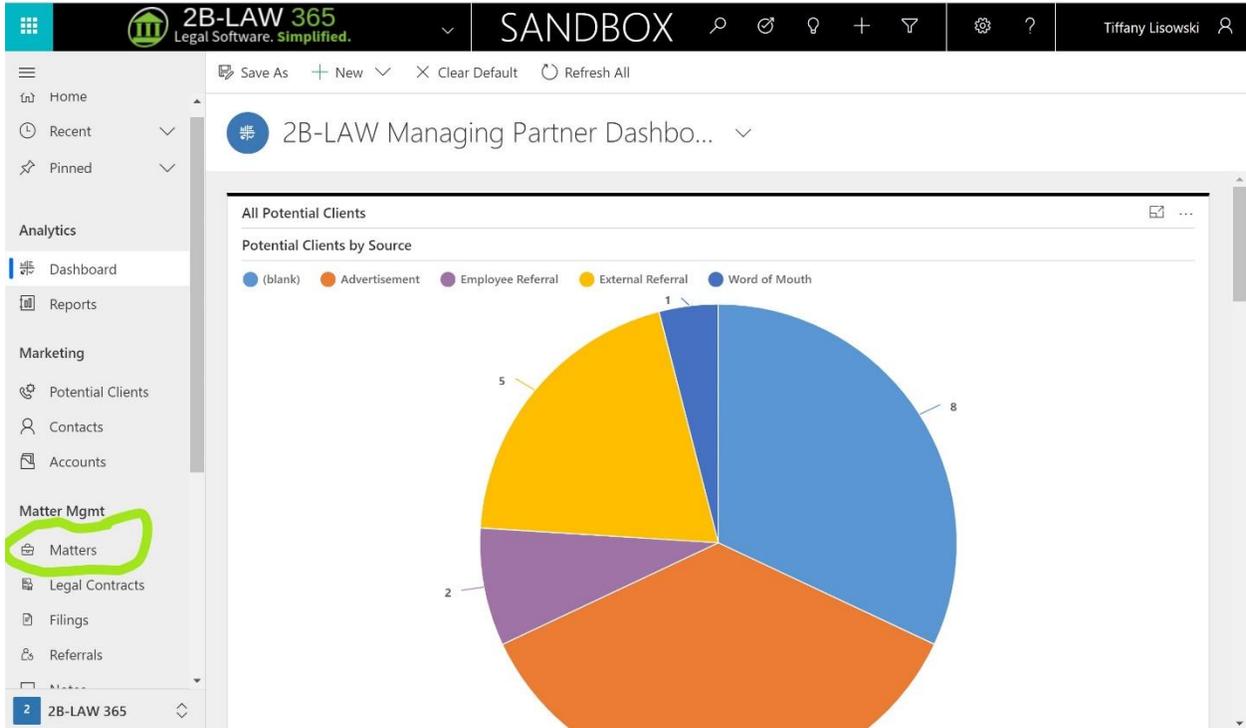
NAVIGATING THE MATTER MGMT SECTION OF 2B-LAW

MATTERS (LEGAL CASES)

Entering a new Matter record.

To enter information on a new matter or case.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Within Matters, the default view shows all Active Matters.

The screenshot shows the 'Active Matters - All' view in the 2B-LAW 365 interface. The table lists various active matters with their respective details.

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. To create a new Matter, click +NEW.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Matters - All Search for records

✓	Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance	D
	Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50	1,
	Acme Co.	Acme Co.	---	---	Demo User	---	4,
	Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00	7,
	Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50	1
	Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50	8,
	Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)	5,

4. Enter Matter information and SAVE.

Form fields and forms can be edited and created. For more information, see [Create and Edit Fields](#) or [Create and Design Forms](#). The 2B-LAW 365 forms provided are not editable. In order to create custom forms, always start by creating a copy of the 2B-LAW Matter: Matter Information form.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

+ New Deactivate Delete Documents Create Pre-Bill Refresh Assign Share Email a Link

Matter: Matter Information Created On 7/25/2019 8:57 AM

Tiffany Roberts

Summary Connections Docket Trust Ledger Outcome Related

CASE INFORMATION

Client * Tiffany Roberts

Name Tiffany Roberts

Matter Number MAT-190725-01034

Assigned Attorney * Tiffany Lisowski

Date of Accident * 7/19/2019

Case Type Civil

Status Reason Active

Referred to ---

Timeline

Enter a note...

No records to show.

Contact

TR Tiffany Roberts

Sales Manager

Acme Co.

tiffany@2bsolutions.com

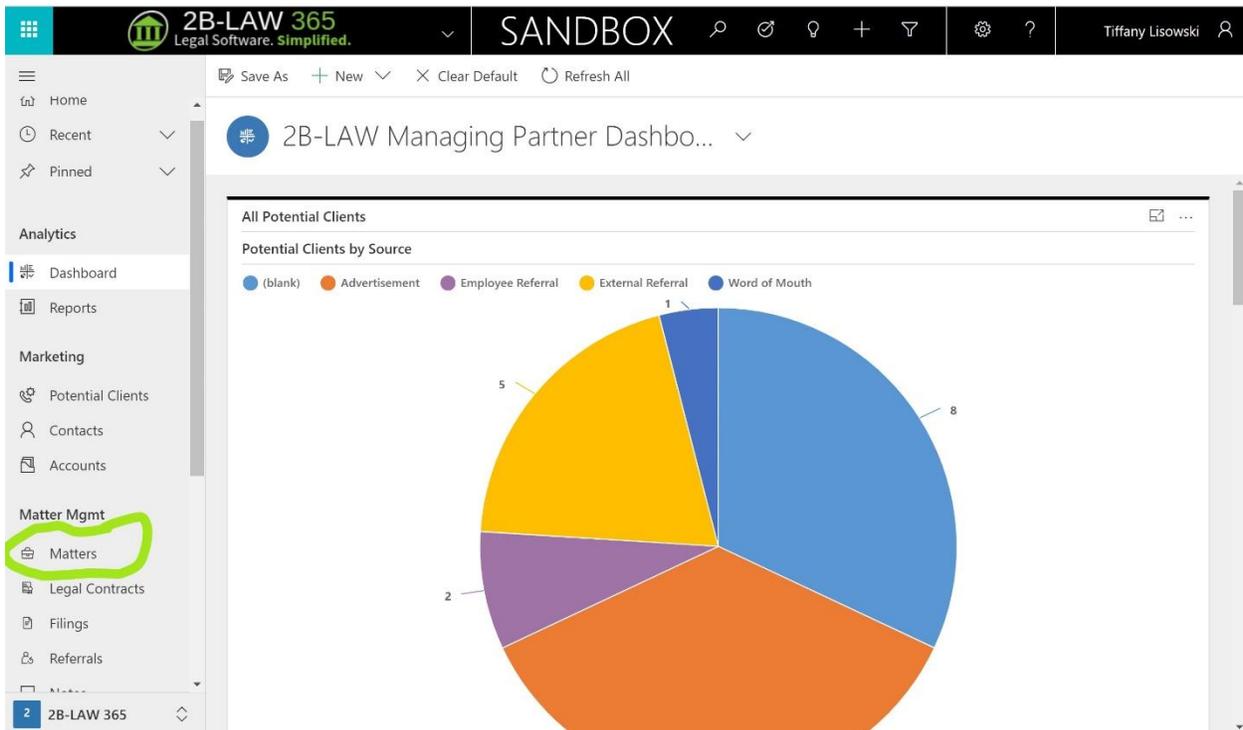
2B-LAW 365 Active Matter Number: MAT-190725-01034 Save

Attaching Documents to a Matter

Attaching documents to a Matter is simple. However, it is required that a SharePoint site be integrated with Dynamics 365/2B-LAW and the 2B-LAW 365 custom entities have been enabled for SharePoint. See [Set Up Dynamics 365 Online to Use SharePoint](#).

The following documents storage is ideal for those documents that are not part of a court's docket. For example, correspondence or client forms. For docket filings, see Utilizing the Docket Section of the Matter Record.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Double-click on the Matter to open Matter record.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Matters - All Search for records

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y

1 - 18 of 18 (0 selected)

3. Click Documents.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

+ New Deactivate Delete Documents Create Pre-Bill Refresh Assign Share Email a Link

Matter: Matter Information Acme Co. Created On 1/29/2019 2:21 PM

Summary Connections Docket Trust Ledger Outcome Related

CASE INFORMATION

Client * Acme Co.

Name Acme Co.

Matter Number MAT-190129-01027

Assigned Attorney * Tiffany Lisowski

Date of Accident * ---

Case Type ---

Status Reason Active

Referred to

Timeline

Enter a note...

No records to show.

Account Acme Co.

Acme Co.

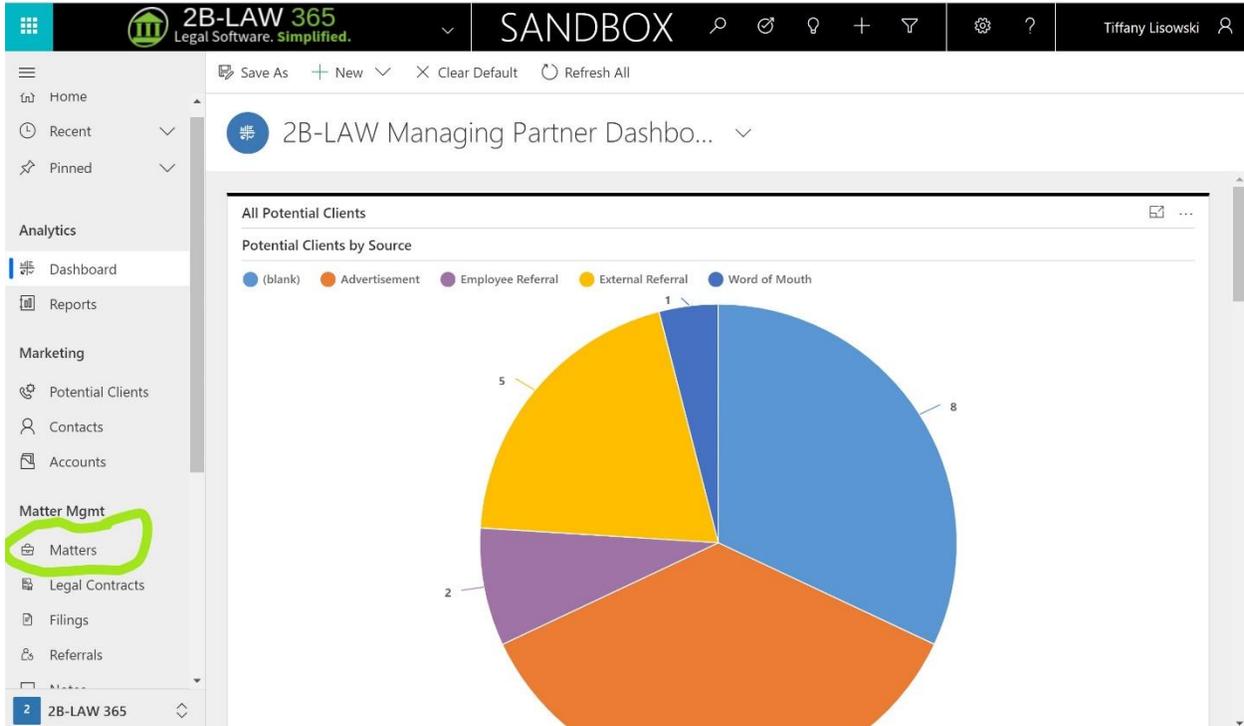
4. In this screen, all documents stored in SharePoint are visible. New documents can be uploaded, folders created, etc. For more information, see [SharePoint](#).

The screenshot displays the 2B-LAW 365 SANDBOX interface. The top navigation bar includes the 2B-LAW 365 logo, the word 'SANDBOX', and a user profile for Tiffany Lisowski. The left sidebar contains navigation options such as Home, Recent, Pinned, Analytics, Dashboard, Reports, Marketing, Potential Clients, Contacts, Accounts, Matter Mgmt, Matters, and Legal Contracts. The main content area shows the 'Documents' section for a matter named 'Acme Co.', which was created on 1/29/2019 at 2:21 PM. Below this, there are tabs for Summary, Connections, Docket, Trust Ledger, Outcome, Documents (selected), and Related. A toolbar offers actions like New, Upload, Document Location, Open Location, Add Location, Edit Location, and Refresh. A 'Document Associated Grid' is shown below, containing a table with columns for Name, Modified, Modified by, Location, and Path. The table lists one document: '2B Solutions Inc. press release Nov. 6 (3).pdf' modified on 7/8/2019 at 12:55 PM by Tiffany Lisowski, located at 'Documents on 2B...' with path 'Acme Co_-_2FB82F7/...'. The status at the bottom indicates '1 - 1 of 1 (0 selected)'.

Utilizing the Docket Section of the Matter Record

The Docket section within a Matter record is meant to provide a quick snapshot of documents filed in a case. Note: Docket records and their associated documents can also be seen and searched under “Filings”.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Double-click on the Matter to open Matter record.

Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. Click on the Docket tab with the Matter record. This section shows a list of documents filed in a case. To enter a new document record, click + Add New Filing.

Matter: Matter Information
Anthony Avery (Sample) Created On: 8/8/2018 1:07 PM

Summary **Docket** Trust Ledger Outcome Related

+ Add New Filing Documents ...

✓	Matter	Type	Date Filed ↑	Filed By	Description	Document
	Anthony Avery (Sample)	---	---	---	---	---
	Anthony Avery (Sample)	Pleading	6/27/2018	O Demo Use. ---	---	---
	Anthony Avery (Sample)	Motion for Extens...	9/17/2018	O Demo Use. ---	---	---
	Anthony Avery (Sample)	Appeal	9/17/2018	O Demo Use. ---	---	---

1 - 4 of 7 (0 selected) Page 1

4. Enter document information and SAVE.

Save Save & Close + New Flow

OWNER
 Tiffany Lisowski

General

Name
Certificate of Service

Matter
 Anthony Avery (Sample)

Type
Other

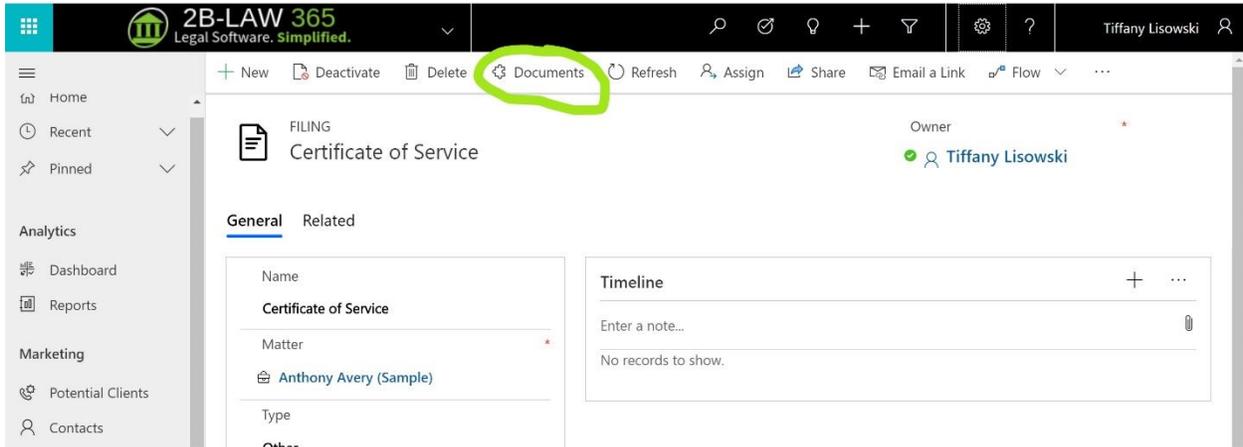
Date Filed
 7/24/2019

Filed By
 Demo User

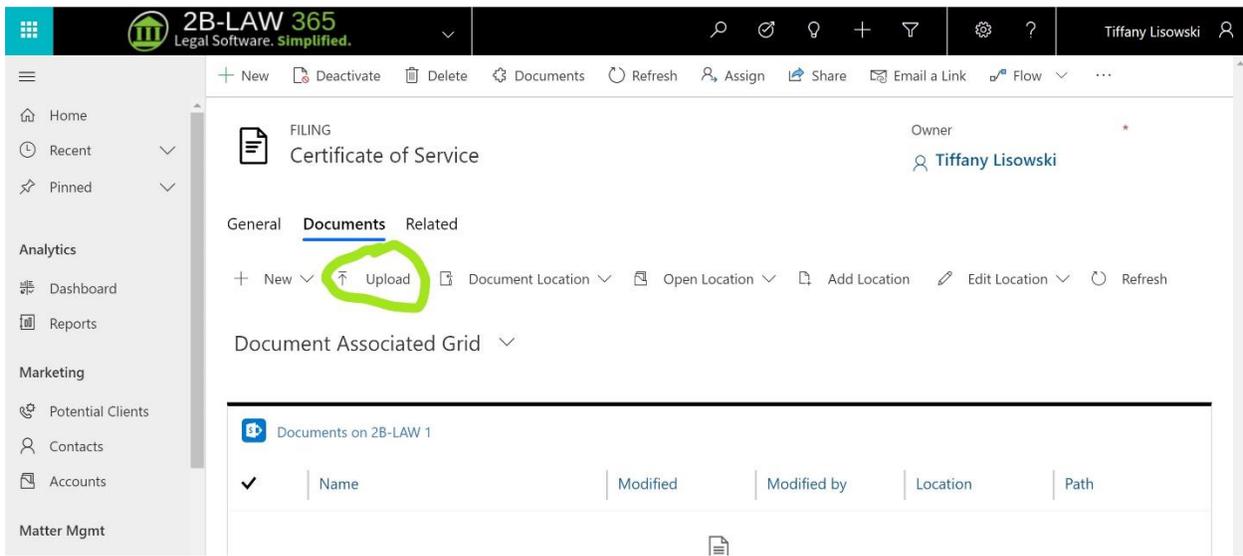
Description

Timeline
 This record hasn't been created yet. To view this record, save it to your timeline.

5. To upload the document, go into the Docket record and click Documents.



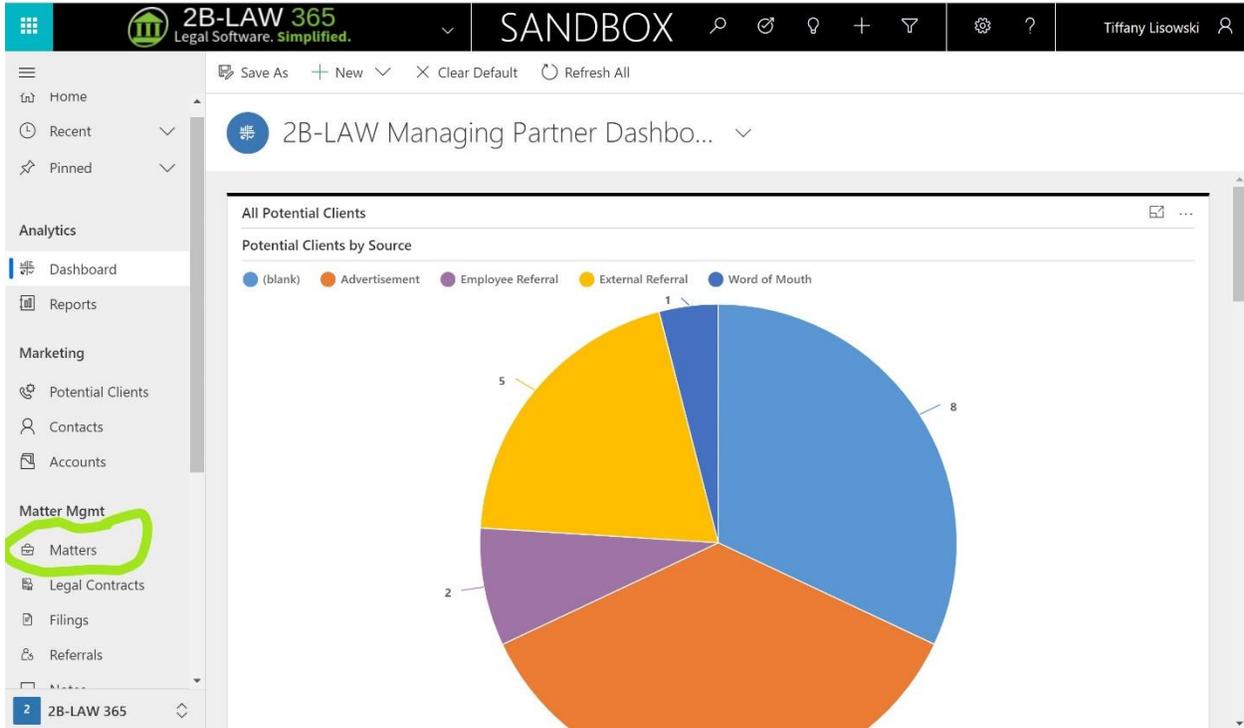
6. Next, click “Upload” and select the appropriate documents.



Quick Create: Time

While working within a Matter record, a new time entry can be created using the following steps:

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Double-click on the Matter to open Matter record.

Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. Scroll down to find Time section on the Matter record. Click on + Add New Time to create a new time entry.

The screenshot shows the 2B-LAW 365 SANDBOX interface. The main content area displays the 'Anthony Avery (Sample)' matter page. The 'TIME' section is active, showing a table with the following data:

Performed On	Billing Rate	Duration	Total	Billed	Description	Owner
4/3/2019	\$250.00	0.75	\$187.50	Yes	sample	Demo User
1/29/2019	\$250.00	1.00	\$250.00	Yes	---	Tiffany Lisowski
12/4/2018	\$250.00	0.00	\$0.00	Yes	---	Tiffany Lisowski
11/6/2018	\$250.00	2.25	\$562.50	Yes	---	Tiffany Lisowski

A green circle highlights the '+ Add New Time' button in the top right corner of the TIME table.

4. A new Quick Create: Time form will appear. Enter pertinent information. Note: The billing rate and initials will prepopulate based upon the initial 2B-LAW 365 User. See Setting Up New Users.

The screenshot shows the 'Quick Create: Time' form overlaid on the matter page. The form contains the following information:

- Time Description:**
 - Matter: * Anthony Avery (Sample)
 - Case Type: * Bankruptcy
 - Fee Type: Flat Fee
 - Activity Code: A101 Plan and prepare for
 - Task Code: L160 Settlement/Non-Binding ADR
 - Description: ---
- Quick Time Entry:**
 - Initials: TR
 - Performed On: 7/25/2019
 - Start Hour (0-23): 11
 - Start Minute (0-59): * 20

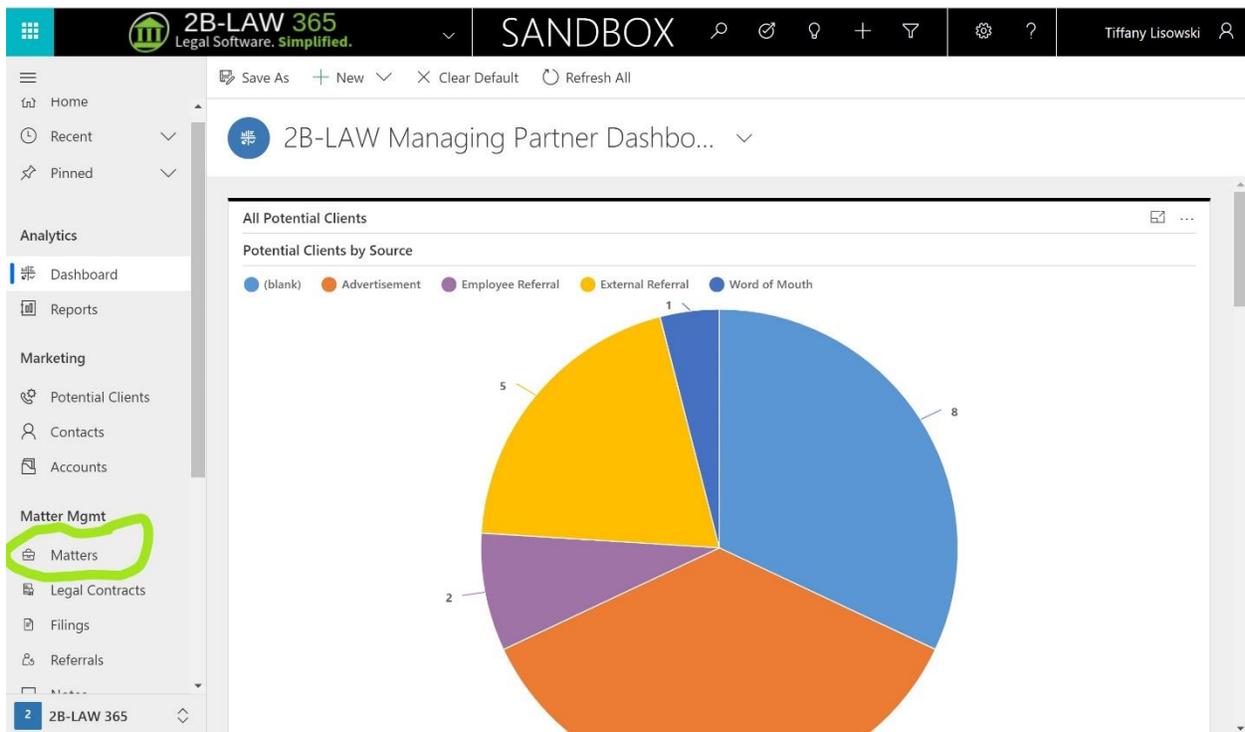
Buttons for 'Save and Close' and 'Cancel' are visible at the bottom right of the form.

5. Note that the Activity Code and Task Code fields are lookups. Those fields point to the predefined codes provided by the American Bar Association. Also note that time can be entered using the 24 hour clock format. Don't forget to save!

Quick Create: Expense

While working within a Matter record, a new Expense entry can be created using the following steps:

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Double-click on the Matter to open Matter record.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Matters - All Search for records

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

1 - 18 of 18 (0 selected)

3. Scroll down to find Expense section on Matter record. Click on the + symbol to create a new expense entry.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

+ New Deactivate Delete Documents Create Pre-Bill Refresh Assign Share Email a Link

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

1 - 4 of 11 (0 selected) Page 1

EXPENSES + Add New Expense Refresh

Expense D...	Expense T...	Paid To	Amount	Billed	Description	Owner
11/1/2018	Rental Car	---	\$100.00	Yes	---	Demo User
9/19/2018	Dining	---	\$32.00	Yes	---	Tiffany Lisows.
9/18/2018	Gasoline	---	\$12.00	Yes	---	Tiffany Lisows.
9/10/2018	Expert Witness	---	\$250.00	Yes	---	Tiffany Lisows.

PAYMENTS + Add New Payment Refresh

Receipt Number	Payment Da...	Amount...	Matter	Paid By	Payment M...
REC-181101-01005	11/1/2018	\$1,000.00	Anthony Avery (Sample)	Anthony Avery (Sam...	Credit Card

4. A new Quick Create: Expense form will appear. Enter pertinent information. Note: The owner initials will prepopulate based upon the initial 2B-LAW 365 User setup.

The screenshot shows the 2B-LAW 365 software interface. The main window displays the 'Matters' section for 'Anthony Avery (Sample)'. A table of expenses is visible, with columns for 'Expense D...', 'Expense T...', 'Paid To', and 'Amount'. The 'Quick Create: Expense' dialog box is open on the right, showing the following details:

- DETAILS**
 - Matter: * Anthony Avery (Sample)
 - Expense Date: 7/24/2019
 - Expense Type: * Other
 - Expense Code: E101 Copying
- PAYMENT**
 - Payment To: Tiffany Roberts
 - Amount: \$110.00
 - Description: Charge for copying medical records
- OWNER**
 - Initials: TR
 - Owner: * Tiffany Lisowski

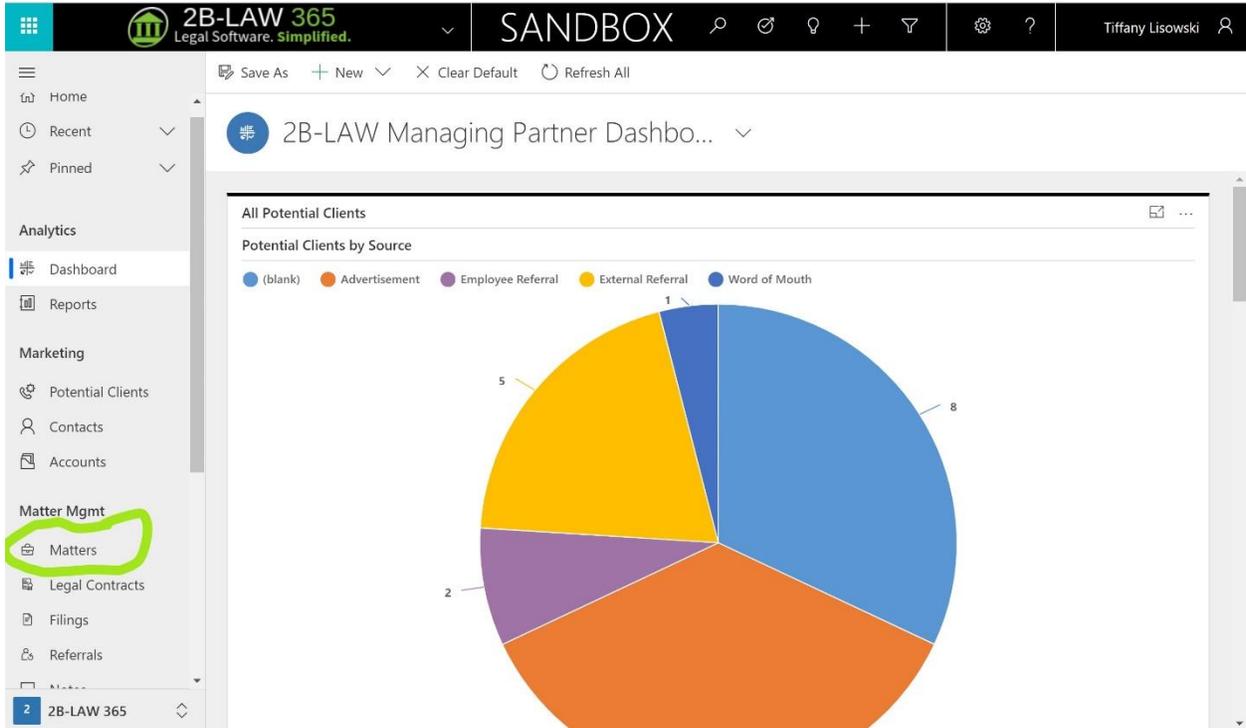
Buttons for 'Save and Close' and 'Cancel' are at the bottom of the dialog box.

5. Note that Expense Code field is a lookup that points to the predefined codes provided by the American Bar Association. Don't forget to save!

Quick Create: Payment

The Payments section within Matter can be used to quickly record payments.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters.

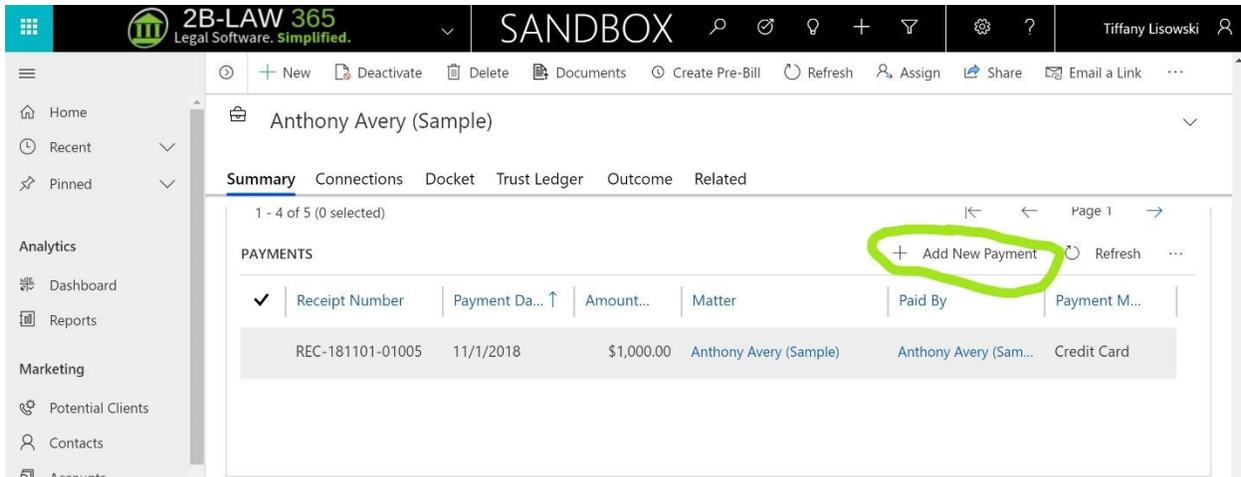


2. Double-click on the Matter to open Matter record.

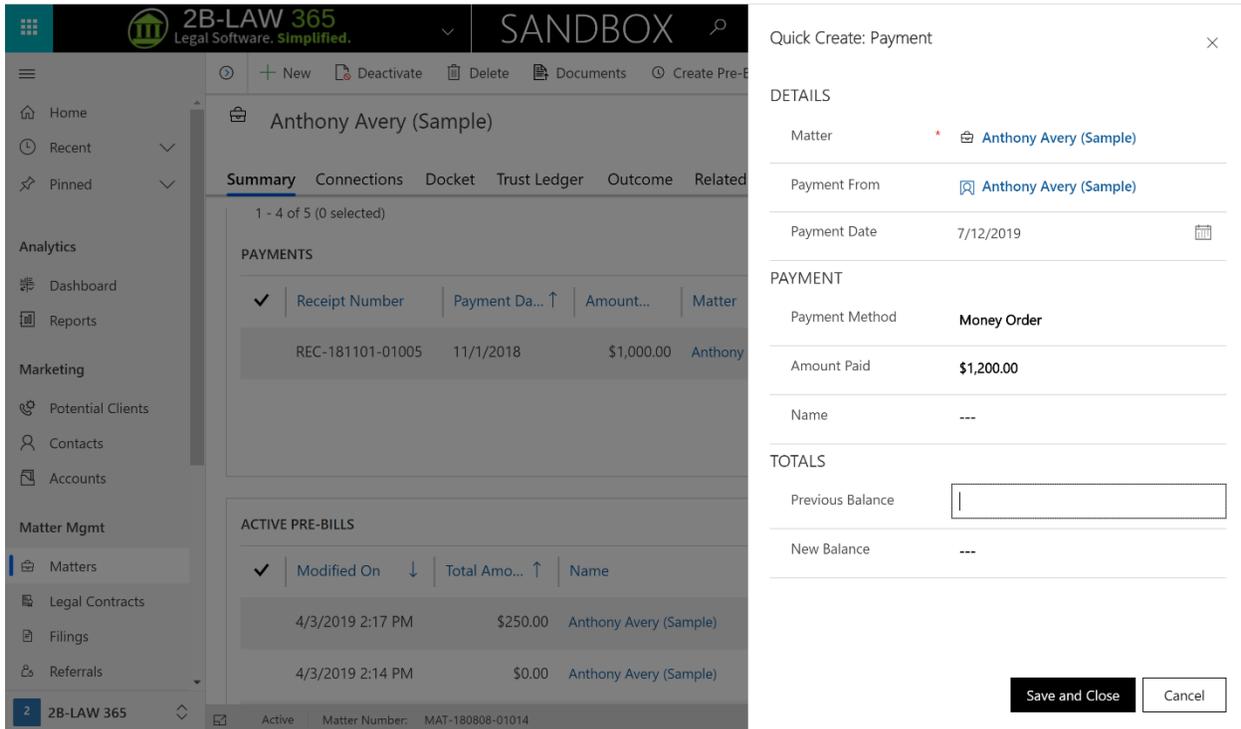
Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. Scroll down the Matter screen to find Payments section and Click +.



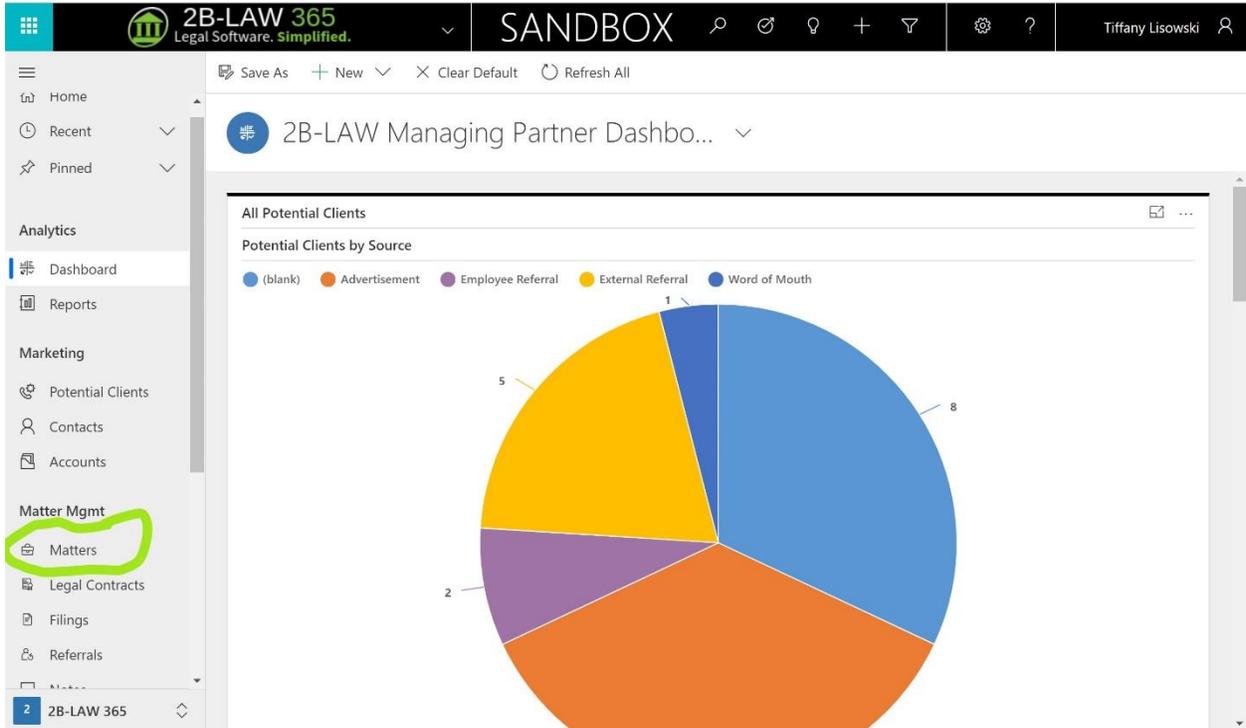
4. Enter payment information and SAVE. Note: A Receipt Number will be generated automatically.



Trust Ledger

2B-LAW 365 provides a simple Trust Ledger feature within a Matter record. To utilize the Trust feature:

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters.



2. Double-click on the Matter to open Matter record.

Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. Click on the Trust Ledger tab and then + Add New Trust Entry.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Matter: Matter Information
 Anthony Avery (Sample) Created On 8/8/2018 1:07 PM

Summary Connections Docket **Trust Ledger** Outcome Related

+ Add New Trust Entry

Date	Payor	Credit ...	Debit (-)	Method	Description	Matter	Recon...	Recoi
11/1/2018	Anthony Avery...	\$1,000.00	---	Credit Card	On Account	Anthony A...	Yes	---

Sum of Credits \$1,000.00 Sum of Debits \$0.00 Trust Balance \$1,000.00

Last updated: 7/24/2019 3:41 PM Last updated: 7/24/2019 3:41 PM

4. Enter information in Trust Ledger form and SAVE!

2B-LAW 365 Legal Software. Simplified. Tiffany Lisowski

Save Save & Close + New Flow

TRUST ENTRY
 New Trust Entry Owner Tiffany Lisowski

General

Matter * Anthony Avery (Sample)

Date 7/17/2019

Method Check

Payor Acme Co.

Description ---

Credit (+) ---

Debit (-) \$800.00

Timeline

This record hasn't been created yet. To view this record, save it to your timeline.

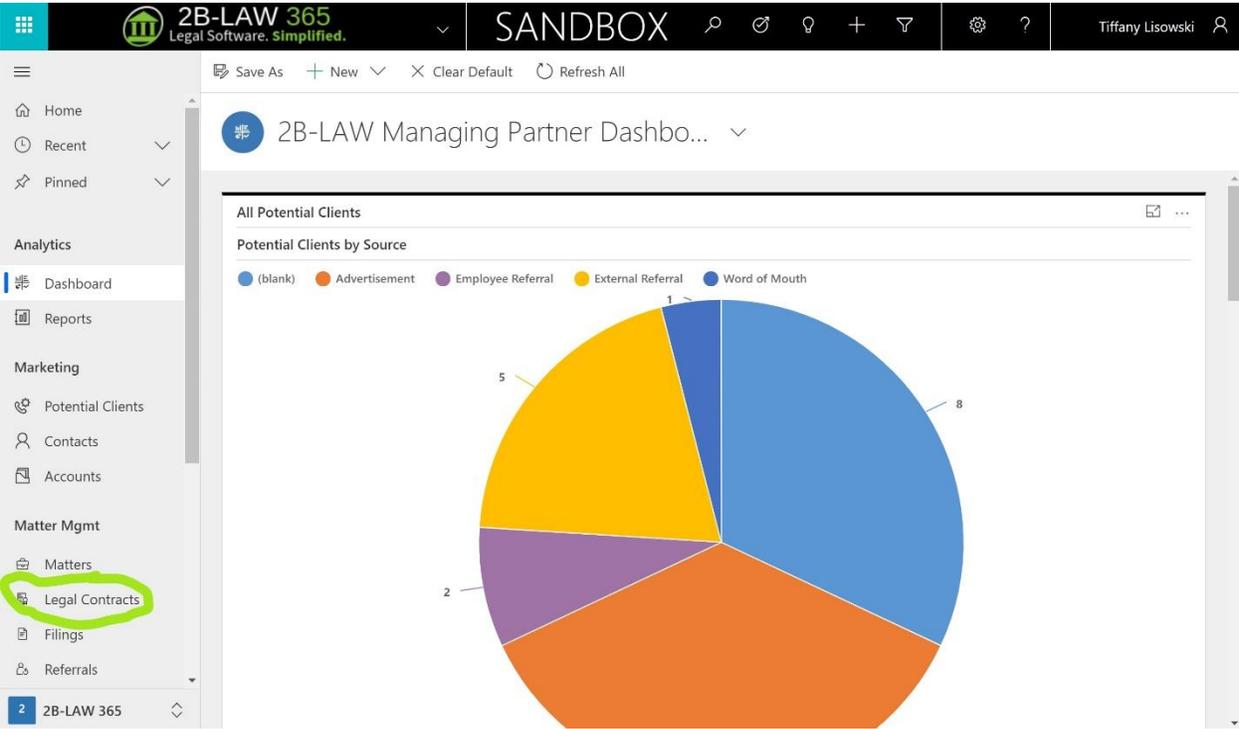
2B-LAW 365 Active unsaved changes Save

5. Note: Trust Ledger totals update once per hour.

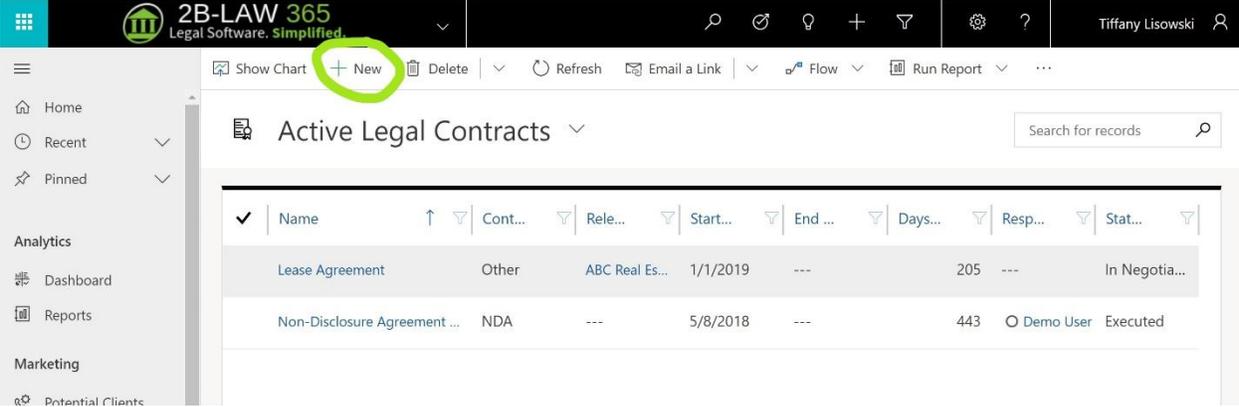
LEGAL CONTRACTS

The Legal Contracts entity within 2B-LAW 365 is meant to provide a separate area to keep track of information regarding contracts affecting the firm itself and its business practices. These contracts could be partnership agreements, NDAs, or any other contract entered into on behalf of the firm. The Legal Contracts section could also be used to store documents that are not related to any active Contact, Account, Matter or Referral.

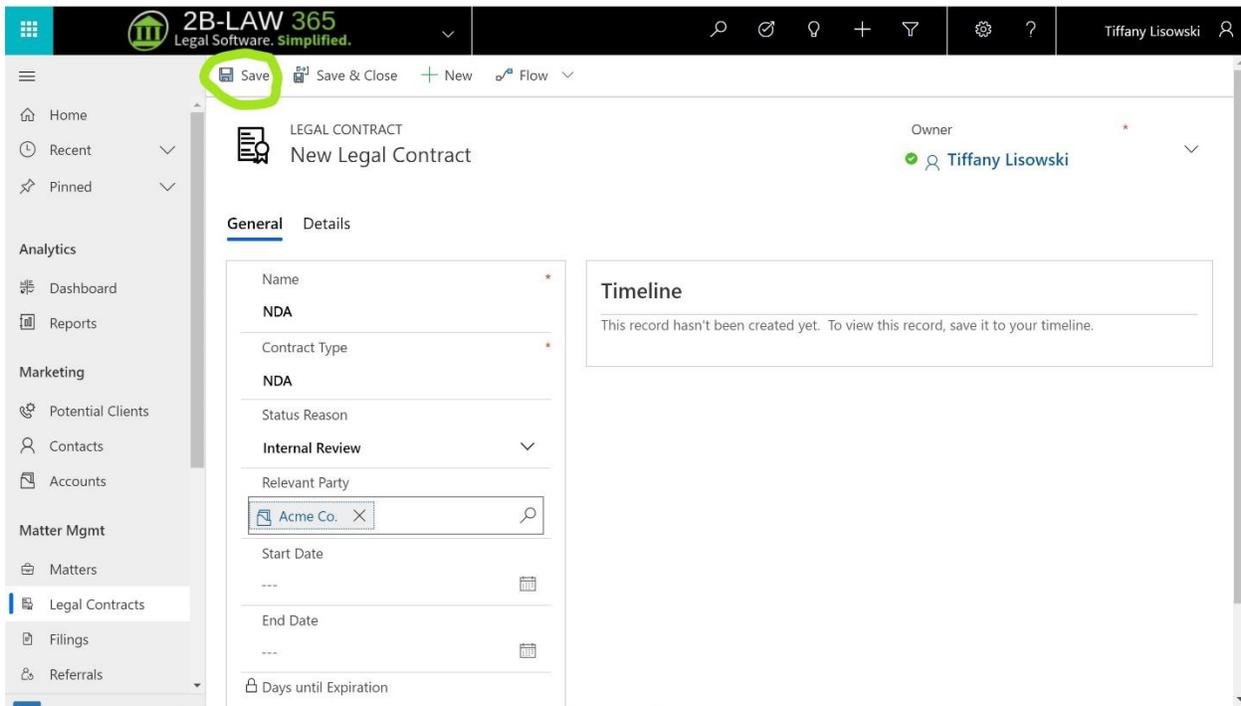
1. Navigate to 2B-LAW 365 → Matter Mgmt → Legal Contracts.



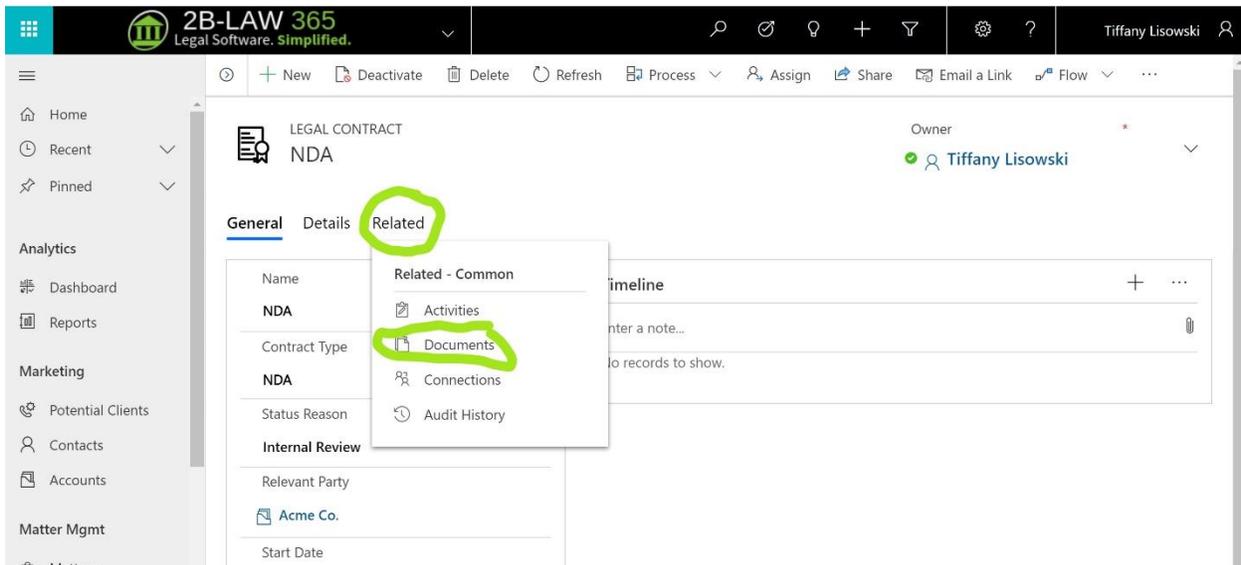
2. The default view shows Active Legal Contracts. To enter a new Legal Contract, Click +NEW.



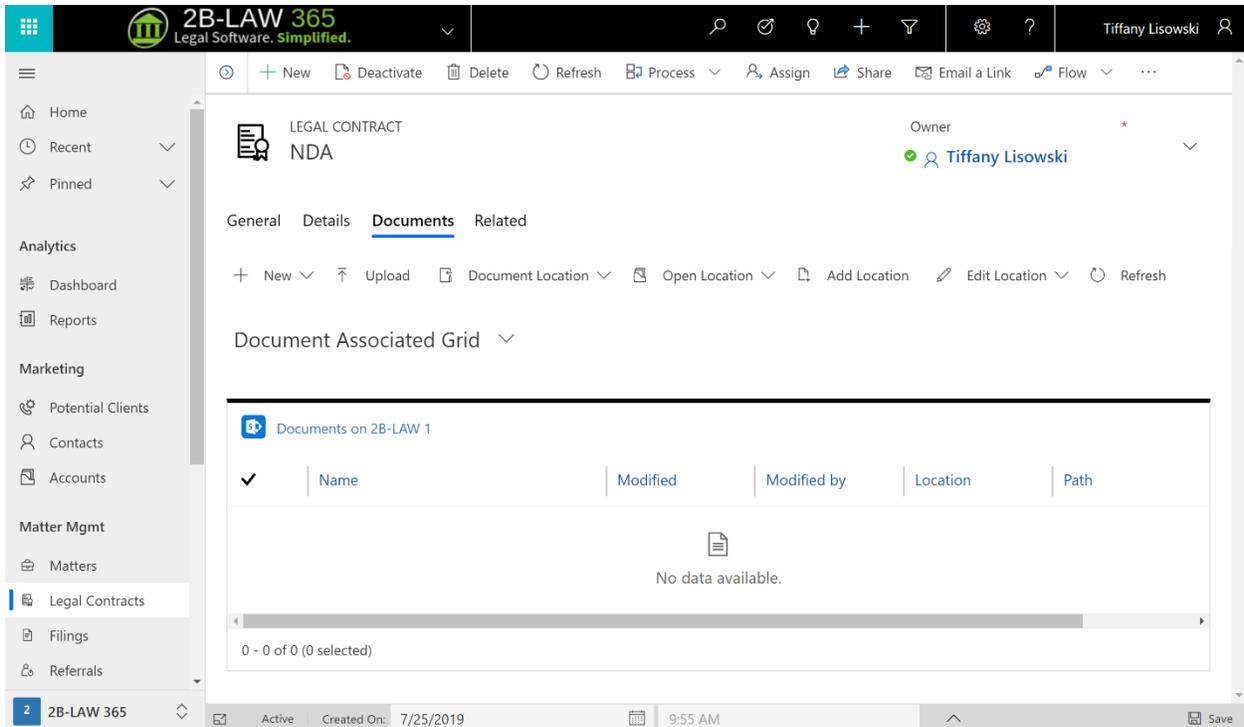
3. Enter information concerning the Legal Contract and SAVE.



4. To upload a copy of the document, click on Related tab and select Documents.



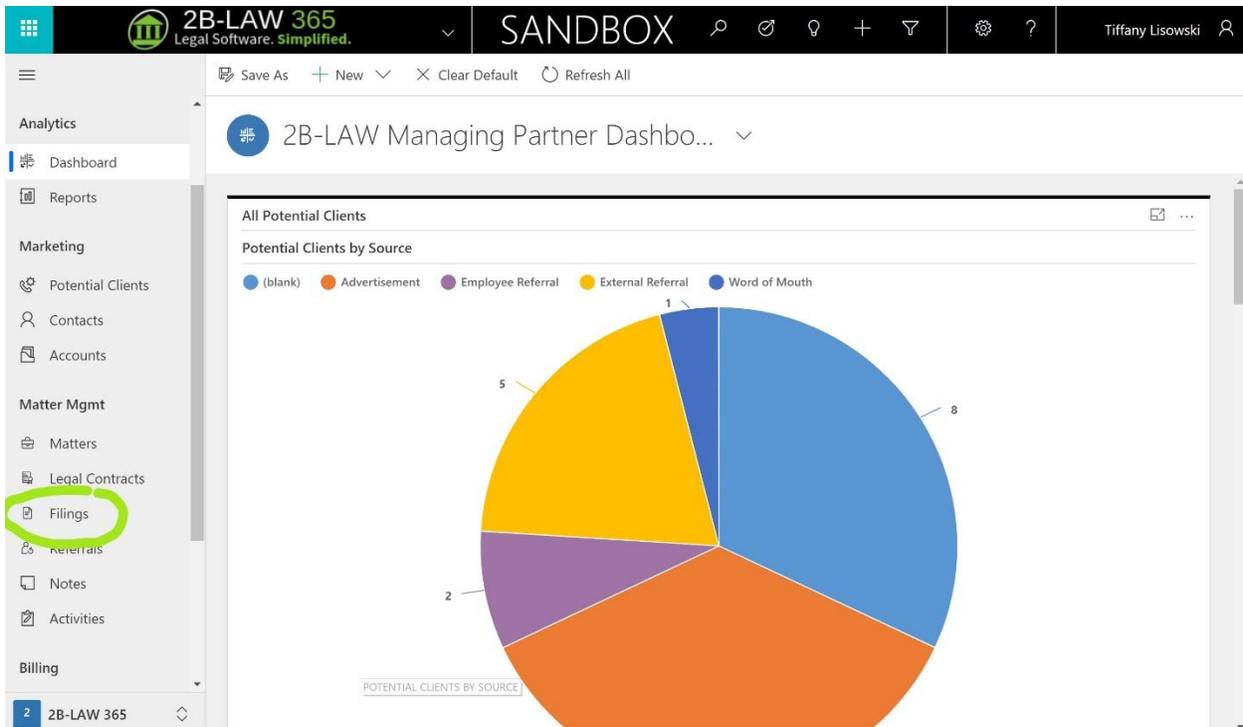
5. Click on Upload and select the document file to attach.



FILINGS

Under Filings, one can search for and view a record of all docket filings. Usually, docket records would be entered from within the Matter record but can be created under Filings as well.

1. Navigate to 2B-LAW 365 → Filings.



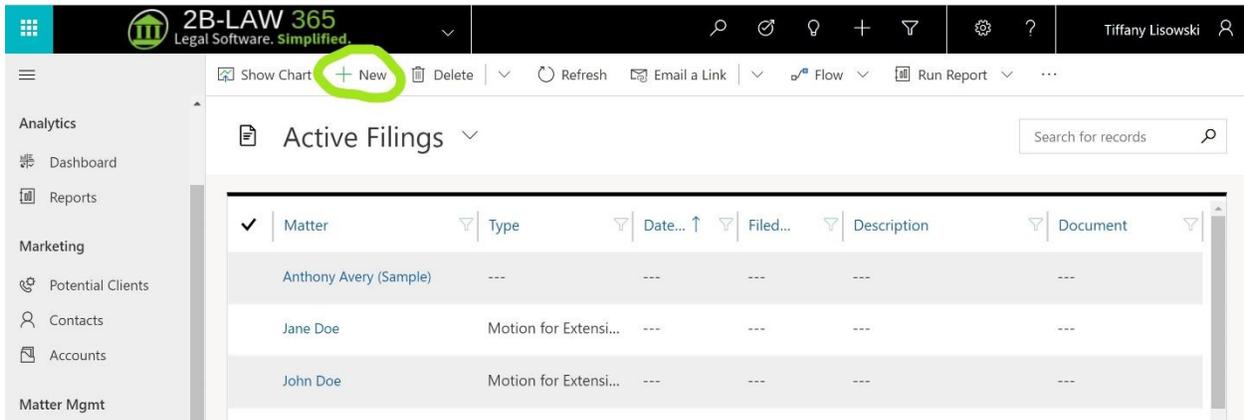
2. Within Filings, the default view is “Active Filings”.

Active Filings

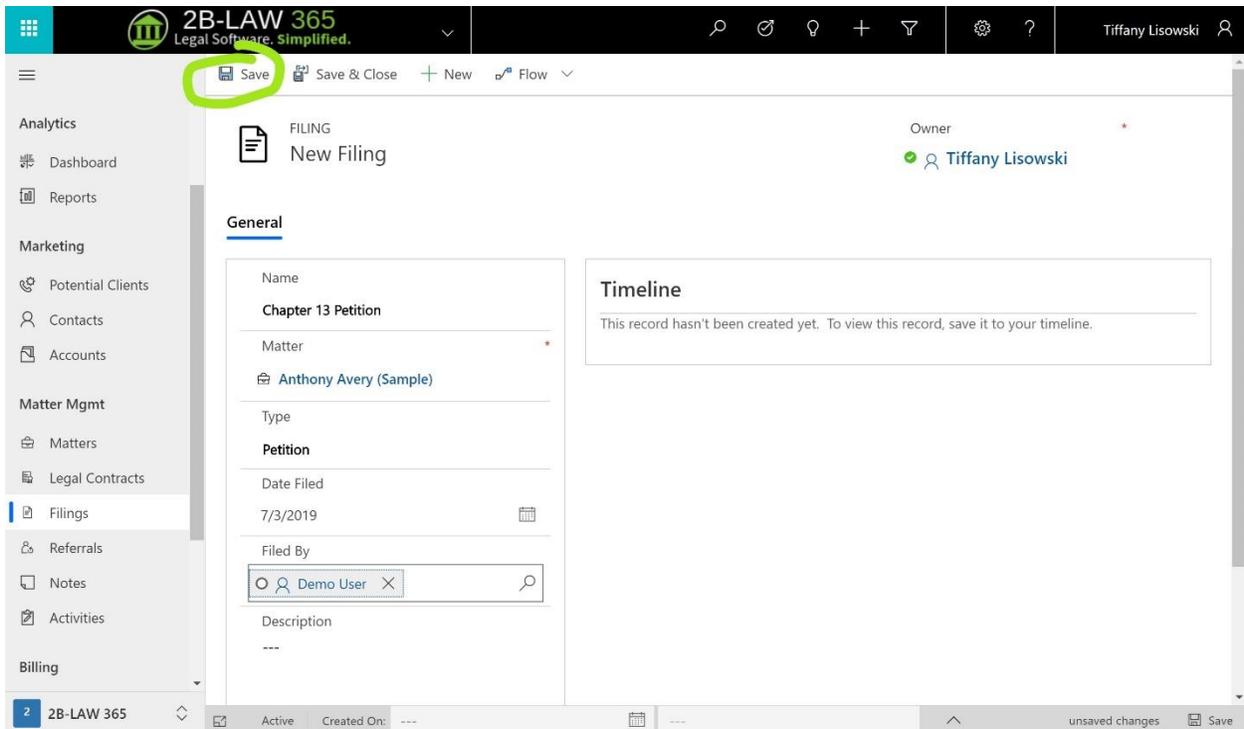
Matter	Type	Date...	Filed...	Description	Document
Anthony Avery (Sample)	---	---	---	---	---
Jane Doe	Motion for Extensi...	---	---	---	---
John Doe	Motion for Extensi...	---	---	---	---
Anthony Avery (Sample)	Pleading	6/27/2018	O Demo User	---	---
Anthony Avery (Sample)	Motion for Extensi...	9/17/2018	O Demo User	---	---
Anthony Avery (Sample)	Appeal	9/17/2018	O Demo User	---	---
Anthony Avery (Sample)	Motion for Extensi...	10/2/2018	O Demo User	---	---

1 - 16 of 16 (0 selected)

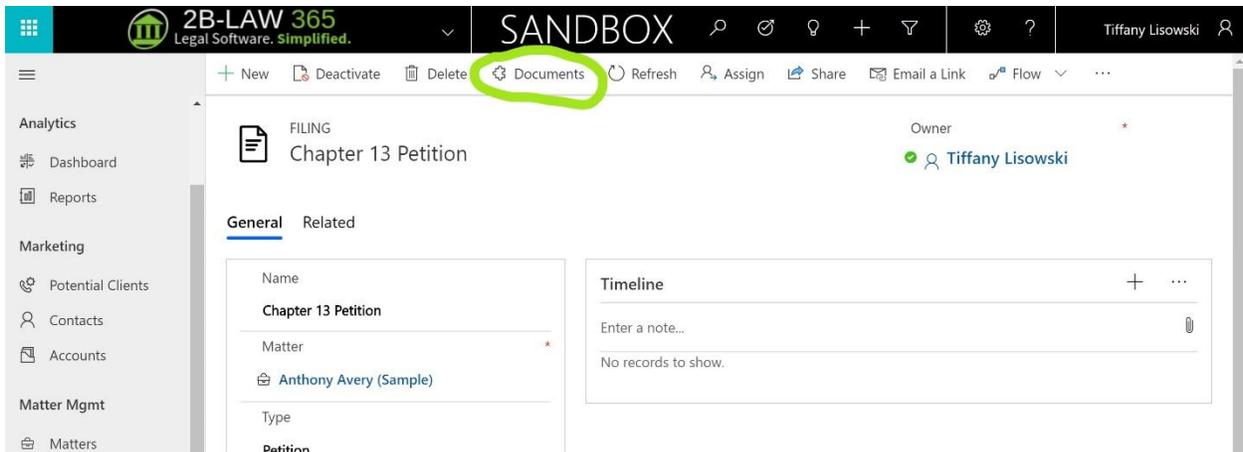
3. To enter a new Filings record, click +NEW.



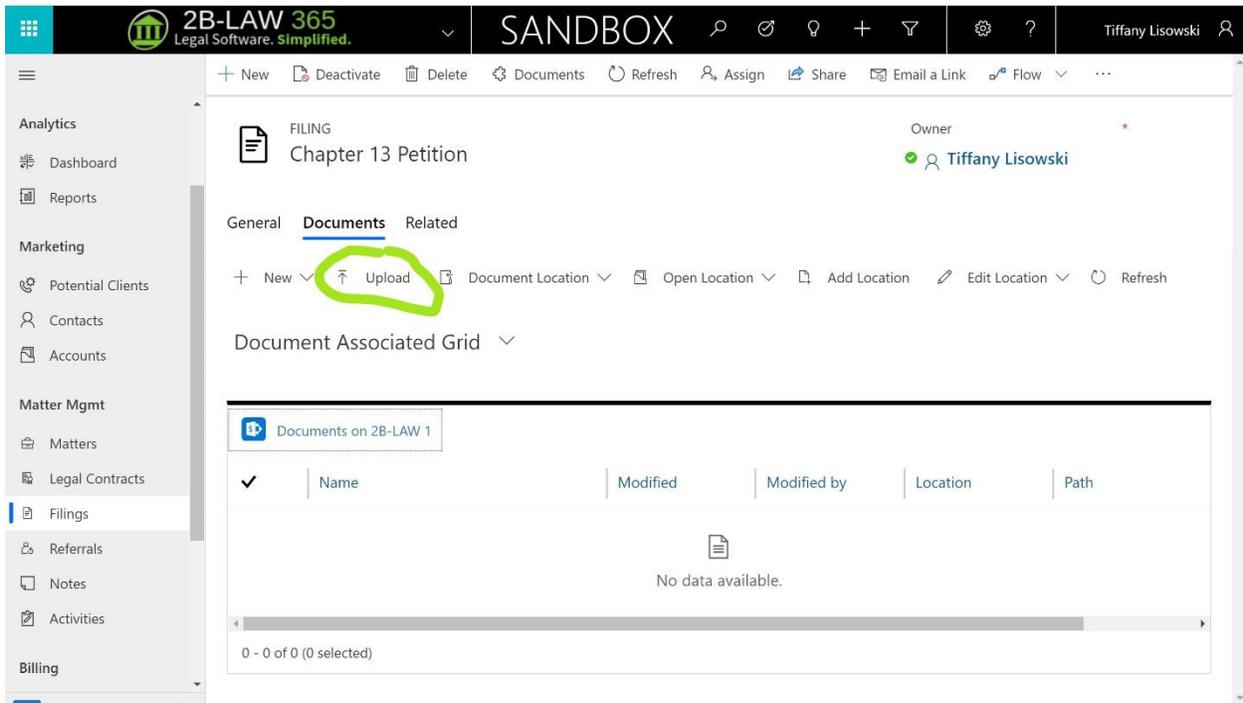
4. Enter applicable information and SAVE.



5. To upload a document, simply click Documents while in the Filing record.



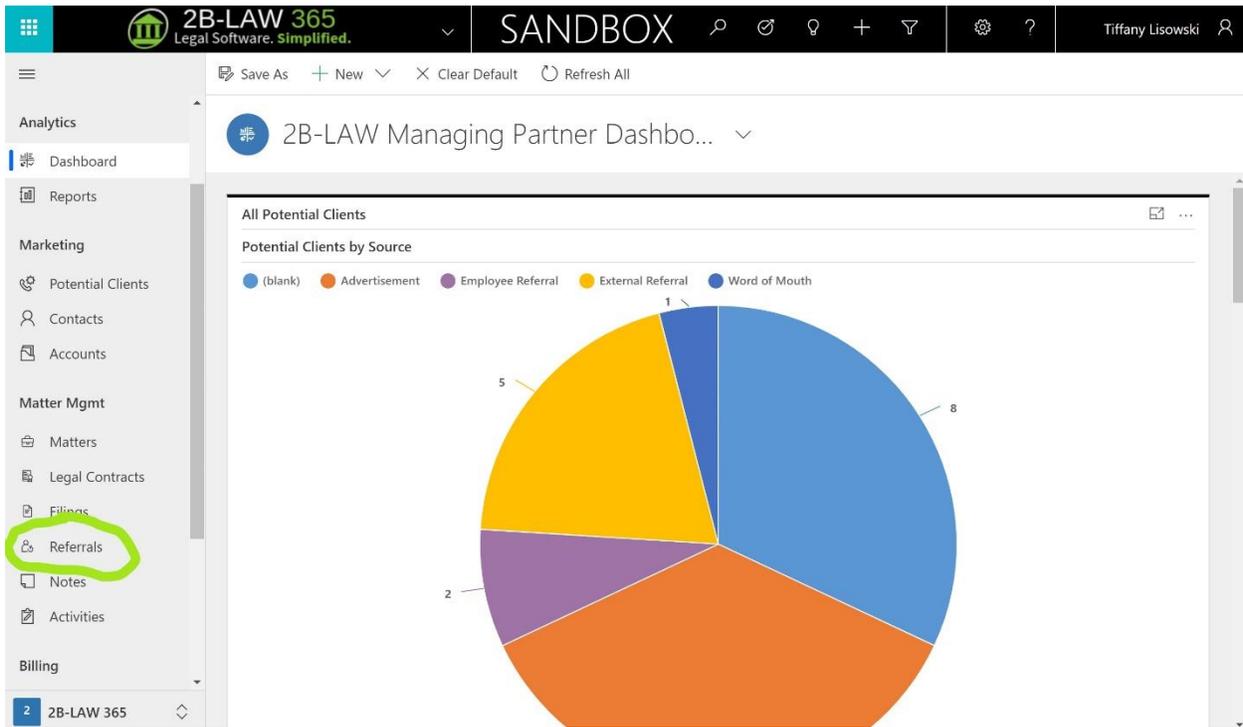
6. Click on “Upload” and select the document.



REFERRALS

In the Marketing section, Referrals were created by converting a Potential Client to a Referral from within the Potential Client record. Referrals can also be created within the Referrals section. Within Referrals, a firm can keep track of any clients or cases referred to another firm.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Referrals



2. Within Referrals, the default view shows all Active Referrals. Create a new Referral by clicking +NEW.

The screenshot shows the 2B-LAW 365 interface with the 'Referrals' module selected. The top navigation bar is the same as in the previous screenshot. The left sidebar is also the same. The main content area displays a table titled 'My Active Referrals'. A '+ New' button is circled in green. The table has a search bar and a table header with columns: Name, Referer..., Ref..., Cas..., Fee..., Esti..., Foll..., and Owner. The table contains one record for Cecilia Williams (Sample) referred by Ali Khalifa Al R... on 3/21/2019, with a fee of Flat Fee and owner Tiffany Lisowski.

✓	Name	↑	Referer...	Ref...	Cas...	Fee ...	Esti...	Foll...	Owner
	Cecilia Williams (Sample) - ...		Ali Khalifa Al R...	3/21/2019	Bankruptcy	Flat Fee	---	---	Tiffany Lisowski

3. Enter information regarding Referral and SAVE.

2B-LAW 365
Legal Software. Simplified.

Save Save & Close + New Flow

REFERRAL
New Referral

Status Reason
Pending

General Outcome

Name
Criminal Case Referral to John Jones

Potential Client
[Ali Khalifa Al Rumaithi](#)

Case Type
Criminal

Referred To
[John Jones](#)

Referral Date
7/5/2019

Referral Reason
Outside Expertise

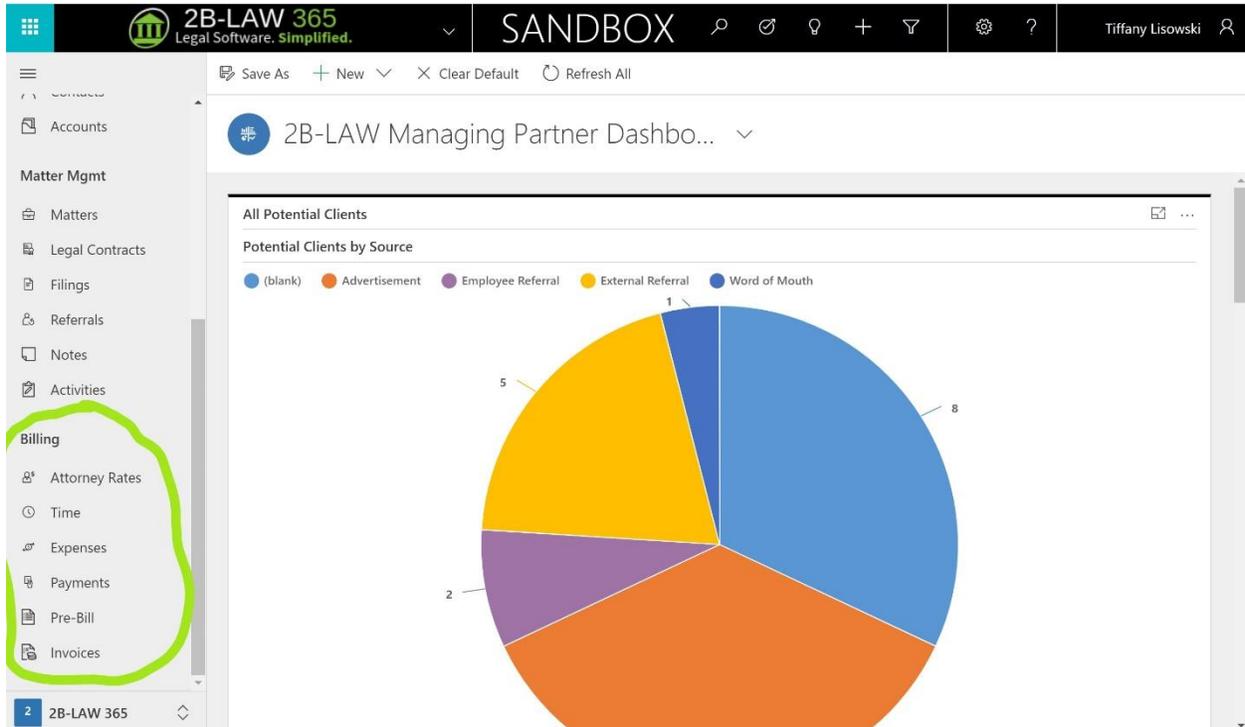
Follow Up Date

Timeline
This record hasn't been created yet. To view this record, save it to your timeline.

2 2B-LAW 365 Active Created On: unsaved changes Save

BILLING

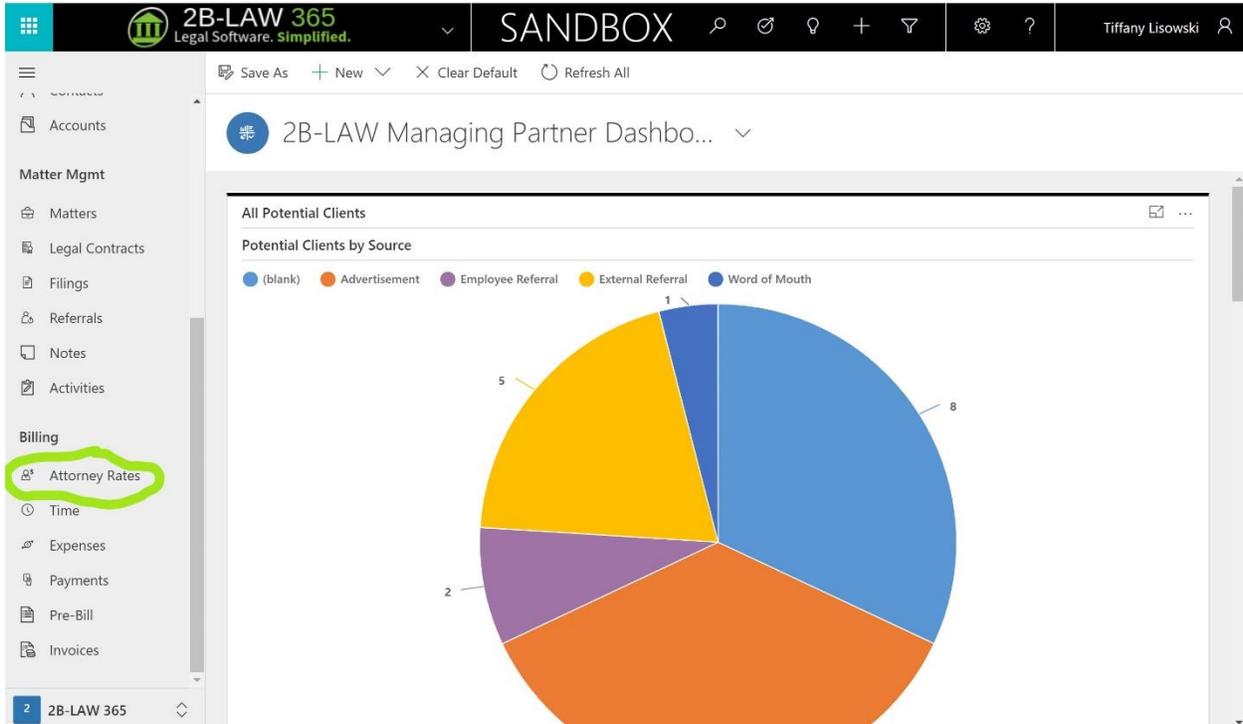
The Billing section of 2B-LAW is meant to provide a basic accounting function and includes entities to enter Attorney Rates which deviate from the default billing rates, enter Time and Expenses, as well as track Payments and create Pre-Bills and Invoices.



Set an Attorney Billing Rate for a Specific Matter

Occasionally, a billing rate for a matter may be different than the default billing rate set within User record. In this case, set a billing rate by doing the following:

1. Navigate to 2B-LAW 365 → Billing → Attorney Rates

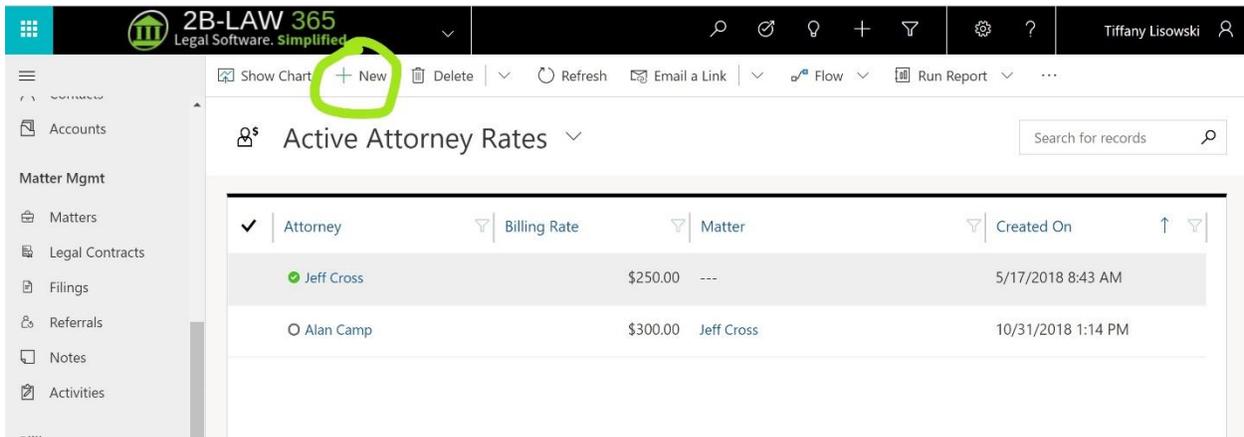


2. Within Attorney Rates, the default view shows all Active Attorney Rates.

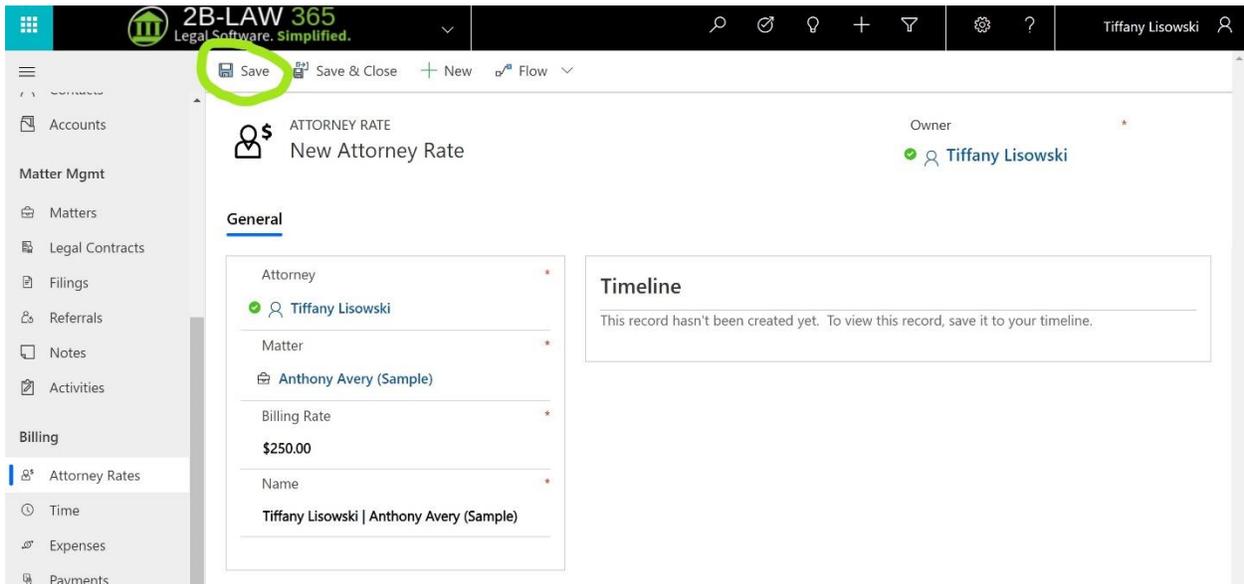
The screenshot shows the '2B-LAW 365' interface with 'Active Attorney Rates' selected. The table below lists active attorney rates with columns for Attorney, Billing Rate, Matter, and Created On.

Attorney	Billing Rate	Matter	Created On
Jeff Cross	\$250.00	---	5/17/2018 8:43 AM
Alan Camp	\$300.00	Jeff Cross	10/31/2018 1:14 PM

3. To set a new Attorney Rate, click +NEW.



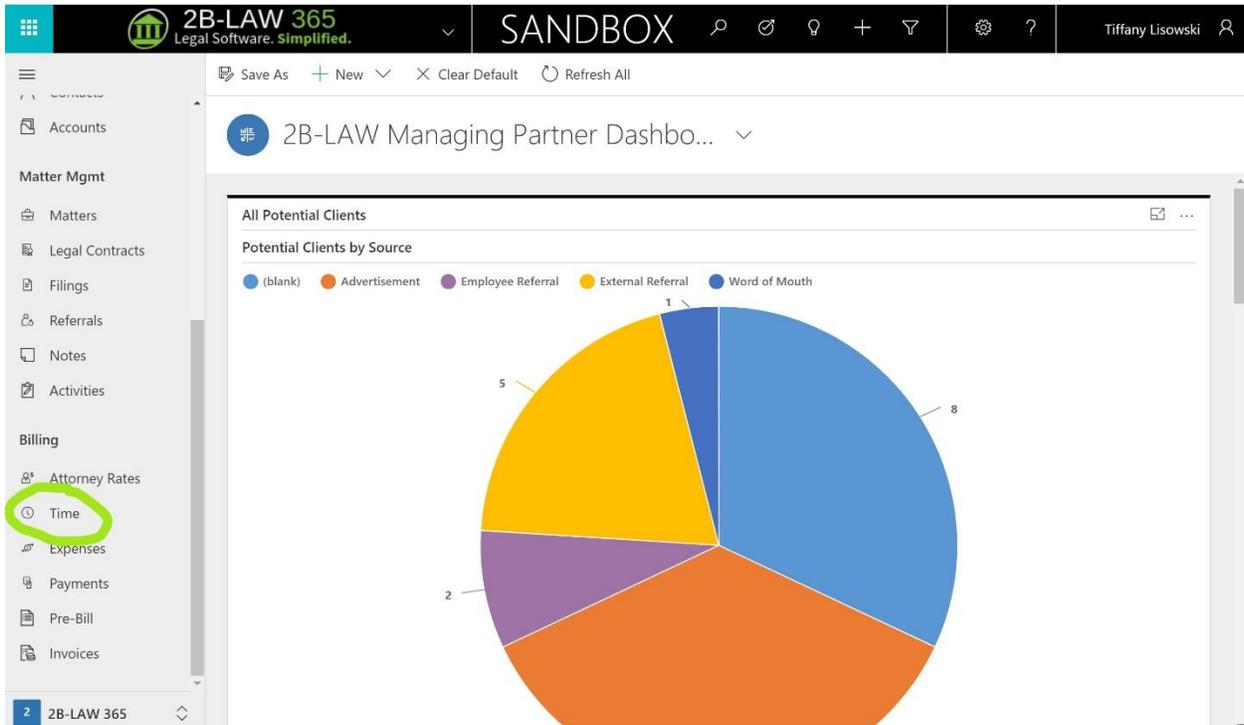
4. Within Attorney Rate record, enter all pertinent information. Note that the fields are “lookup fields”. This attaches the Attorney Rate record to an attorney and to the matter requiring the alternative billing rate. Click “SAVE” before existing.



Time Entries

Time records can be created using the Quick Create: Time form within a Matter (See Matter section). Time records can also be created from within the Time entity under Billing.

1. Navigate to 2B-LAW 365 → Billing → Time.



2. Within Time, the default view shows all Active Time entries.

2B-LAW 365 Legal Software. Simplified. **SANDBOX** Tiffany Lisowski

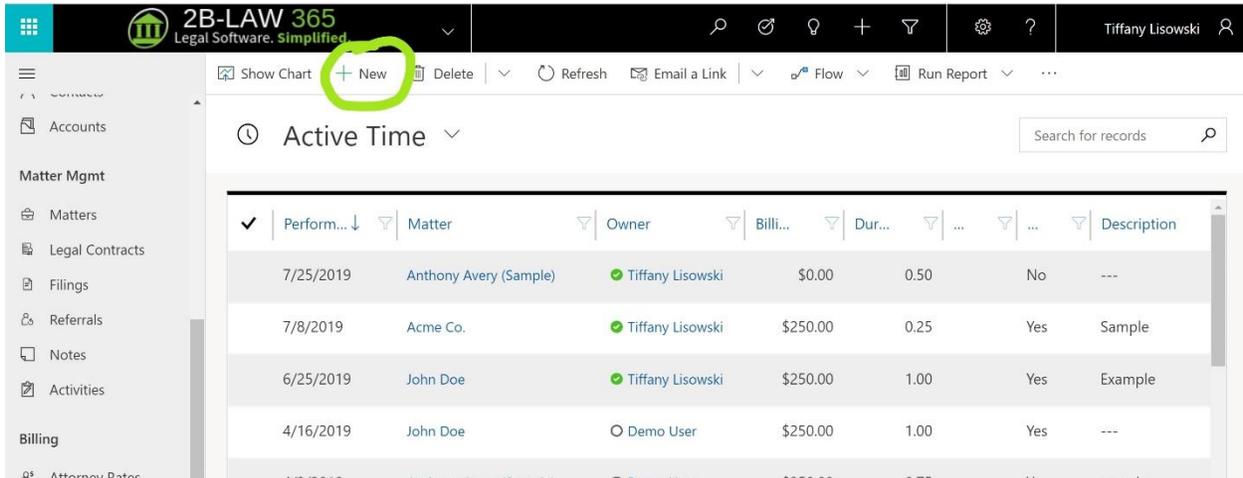
Active Time

Perform...	Matter	Owner	Billi...	Dur...	...	Description
7/25/2019	Anthony Avery (Sample)	Tiffany Lisowski	\$0.00	0.50	No	---
7/8/2019	Acme Co.	Tiffany Lisowski	\$250.00	0.25	Yes	Sample
6/25/2019	John Doe	Tiffany Lisowski	\$250.00	1.00	Yes	Example
4/16/2019	John Doe	Demo User	\$250.00	1.00	Yes	---
4/3/2019	Anthony Avery (Sample)	Demo User	\$250.00	0.75	Yes	sample
4/3/2019	Remington	Tiffany Lisowski	\$250.00	0.50	Yes	Phone call with c
1/29/2019	Anthony Avery (Sample)	Tiffany Lisowski	\$250.00	1.00	Yes	---

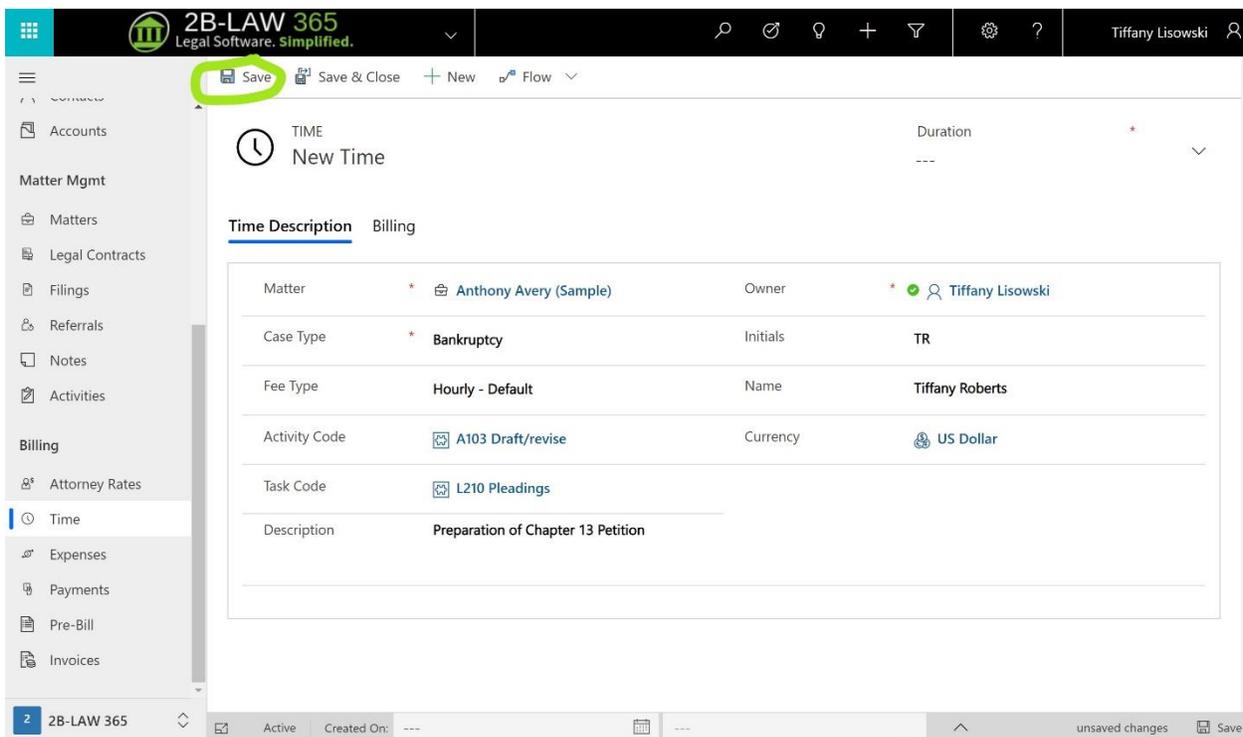
1 - 19 of 19 (0 selected)

2B-LAW 365

3. To enter a new Time record, click +NEW.



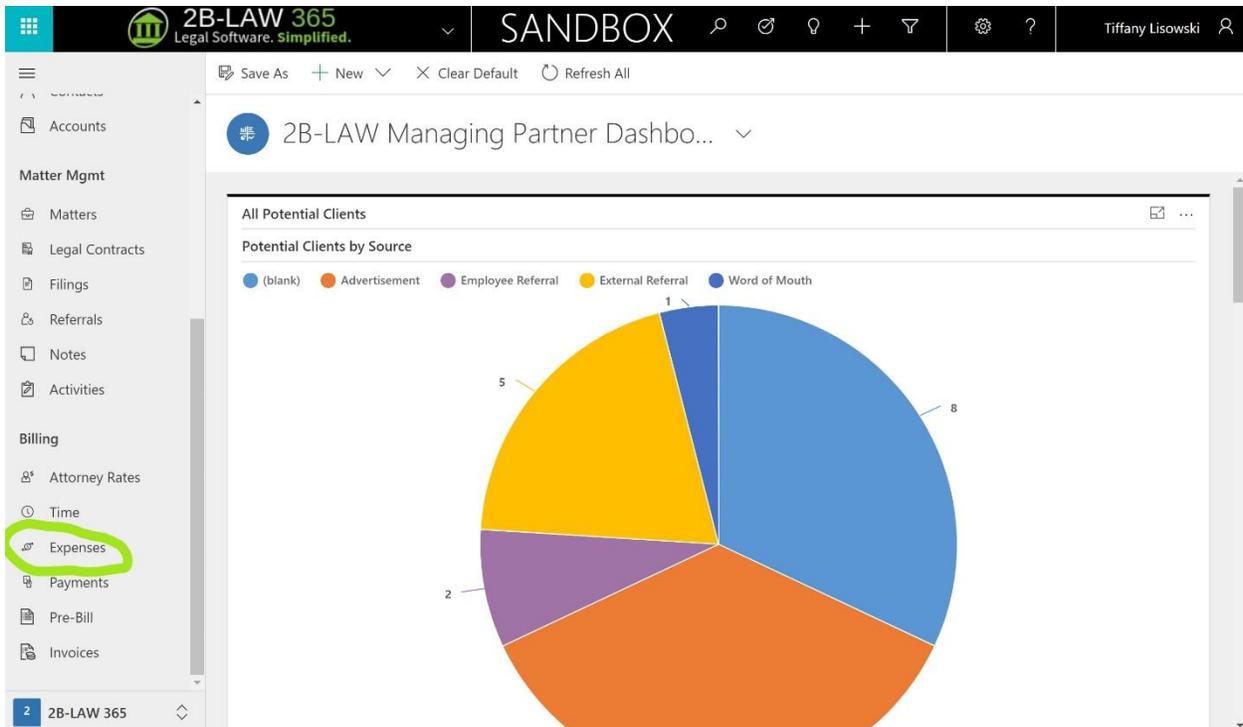
4. Enter pertinent information for the Time entry and SAVE.



Expense Records

Expense records can be created using the Quick Create: Expense form within a Matter (See Matter section). Expense records can also be created from within the Expenses entity under Billing.

1. Navigate to 2B-LAW 365 → Billing → Expenses



2. Within Expenses, the default view shows all Active Expenses.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Show Chart + New Delete Refresh Email a Link Flow Run Report

Active Expenses Search for records

Exp...	Matter	Owner	Expense Type	Am...	Paid To	Descripti
7/24/2019	Anthony Avery (Sample)	Tiffany Lisowsk	Other	\$110.00	Tiffany Roberts	Charge fo
7/8/2019	Acme Co.	Tiffany Lisowsk	Airfare	\$100.00	Vendor	---
6/25/2019	John Doe	Tiffany Lisowsk	Airfare	\$300.00	Vendor	---
4/16/2019	John Doe	Demo User	Taxi	\$1,000.00	Acme Co.	---
11/5/2018	Remington	Tiffany Lisowsk	Other	\$74.26	Staples	---
11/1/2018	Ali Khalifa Al Rumaithi	Demo User	Dining	\$50.00	---	---
11/1/2018	Anthony Avery (Sample)	Demo User	Rental Car	\$100.00	---	---

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 10 of 10 (0 selected)

2B-LAW 365

3. To enter a new Expense record, click on +NEW.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Show Chart **New** Delete Refresh Email a Link Flow Run Report

Active Expenses Search for records

Exp...	Matter	Owner	Expense Type	Am...	Paid To	Descripti
7/24/2019	Anthony Avery (Sample)	Tiffany Lisowsk	Other	\$110.00	Tiffany Roberts	Charge fo
7/8/2019	Acme Co.	Tiffany Lisowsk	Airfare	\$100.00	Vendor	---
6/25/2019	John Doe	Tiffany Lisowsk	Airfare	\$300.00	Vendor	---

4. Enter information on Expense form and SAVE.

2B-LAW 365 Legal Software. Simplified. SANDBOX Tiffany Lisowski

Save Save & Close New Flow

EXPENSE New Expense Paid To John Jones

General

DETAILS

Matter	* Anthony ...	Payment To	John Jones	Initials	TR
Expense Date	7/11/2019	Reimbursable	No	Owner	* Tiffany Lisow..
Expense Type	* Other	Amount	\$25.00	Paid To Type	Account
Expense Code	E102 Outs...	Billed	No		

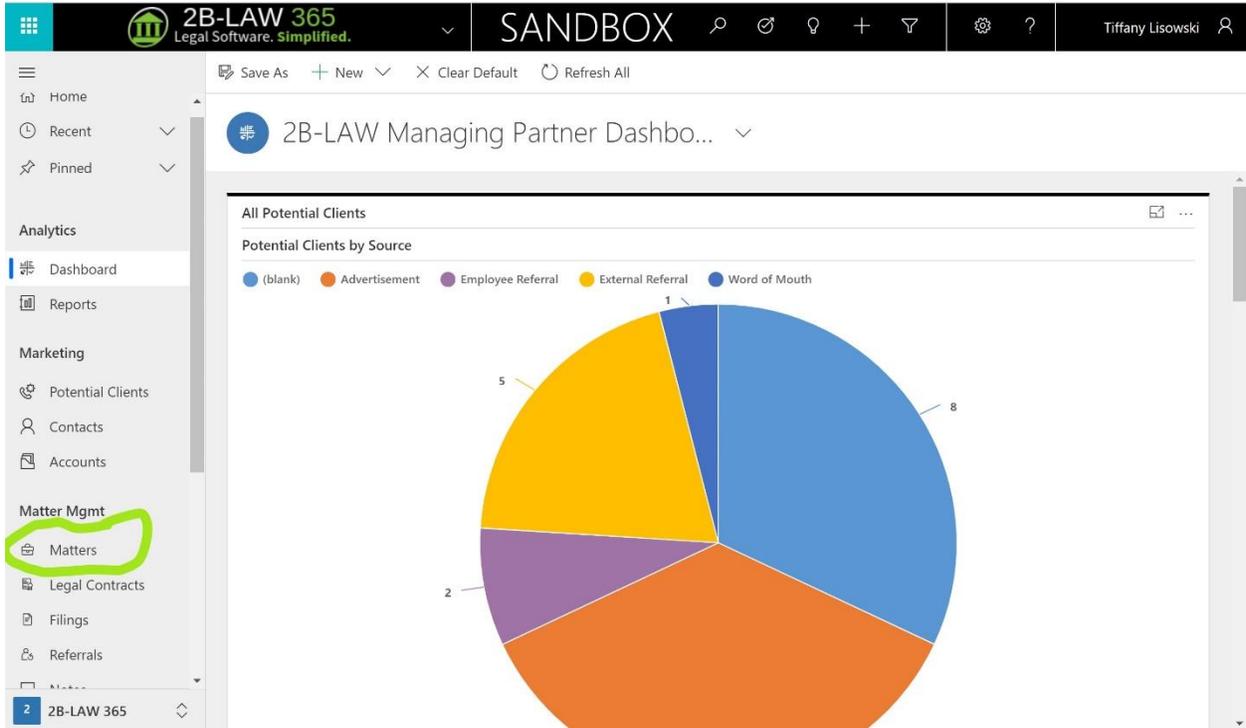
DESCRIPTION

Fee to copy financial documents.

Creating Pre-Bills from within Matter record

Pre-Bills are most easily created from within a Matter record.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters

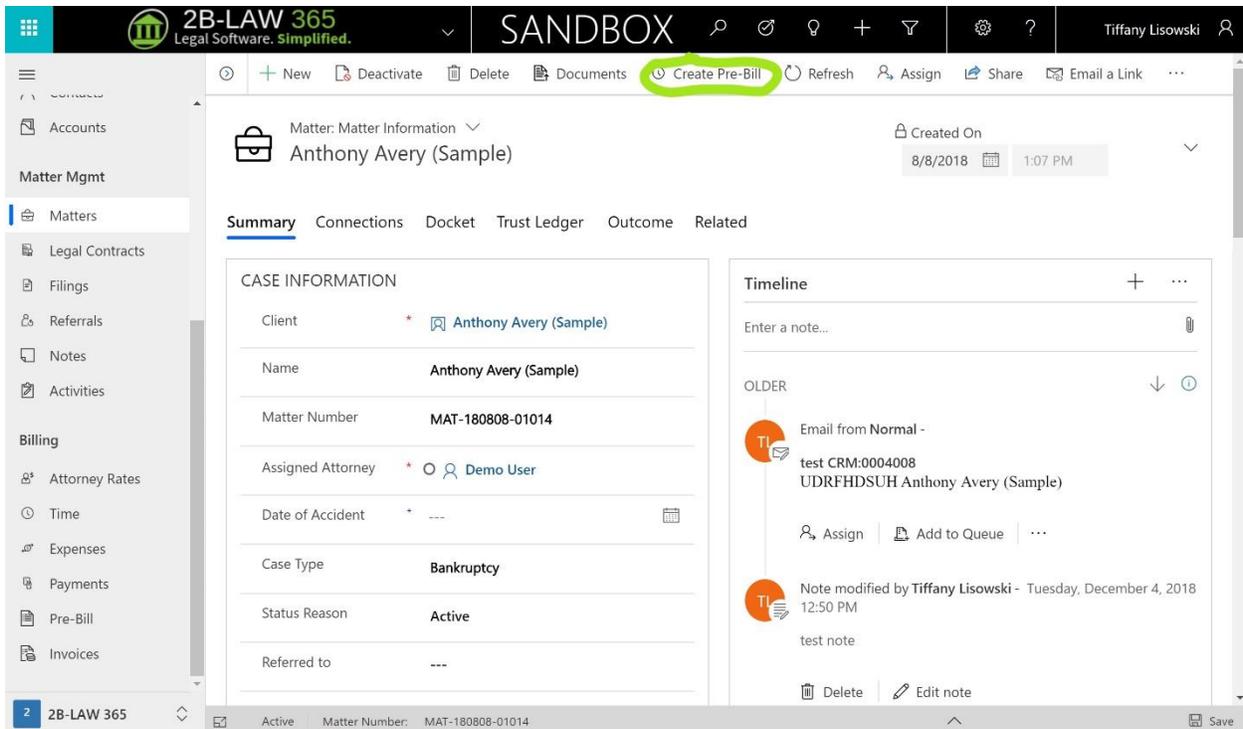


2. Double-click on the Matter to open Matter record.

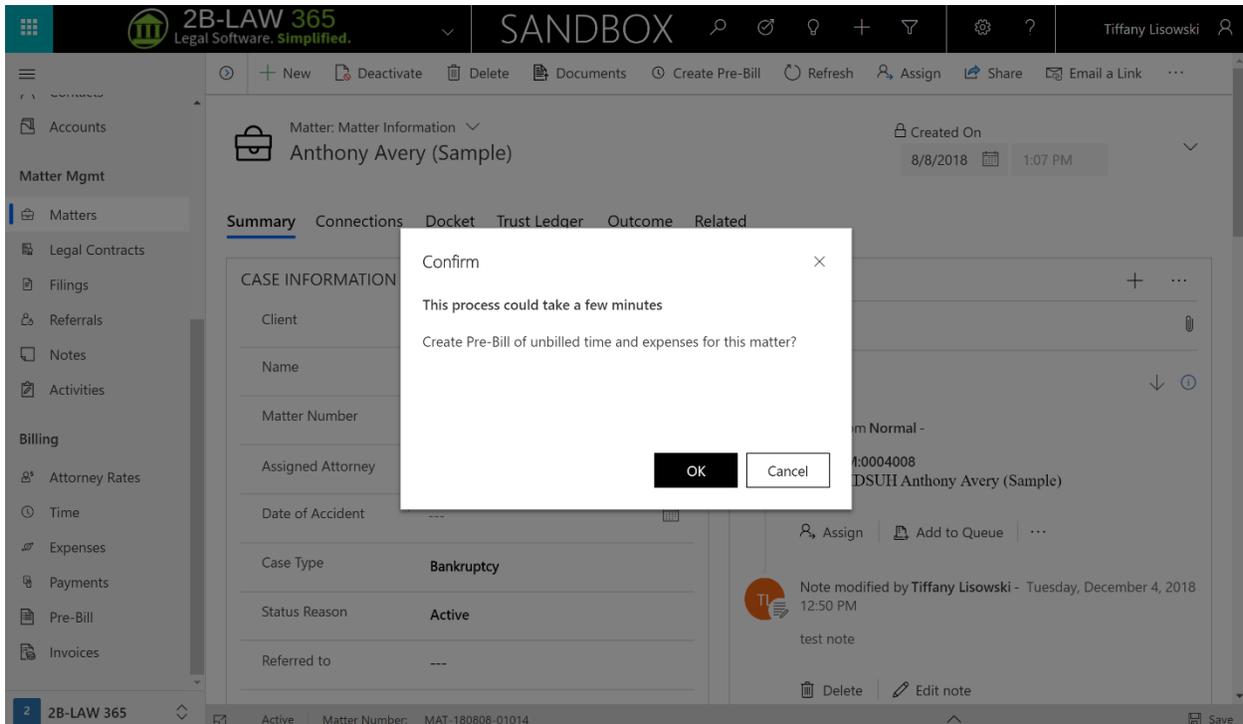
Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

3. Within the Matter record, click Create Pre-Bill.



4. Confirm by clicking Okay. A Pre-Bill will be created using all unbilled time and expense entries.



- A new screen will pop-up showing the Pre-Bill information. Items on the Pre-Bill can be edited by clicking on that item.

2B-LAW 365
Legal Software. Simplified.

Pre-Bill > Anthony Avery (Sample) **SANDBOX**

Tiffany Lisowski

+ New Delete Refresh Create Invoice Process Fulfill Order Cancel Order Recalculate Get Products Lock Pricing

Pre-Bill: 2B-LAW Pre-Bill Anthony Avery (Sample) Total Amount \$0.00 Status Active

Summary Details Related

Order ID: ORD-01026-Y8N1K3
Name: Anthony Avery (Sample)
Currency: US Dollar
Price List: 2B-LAW
Prises Locked: No

Item	Description	Amount
Ex	Expense Not Configured	\$25.00
Ex	Expense Not Configured	\$110.00
LS	Legal Service Not Configured	\$250.00
LS	Legal Service Not Configured	\$0.00

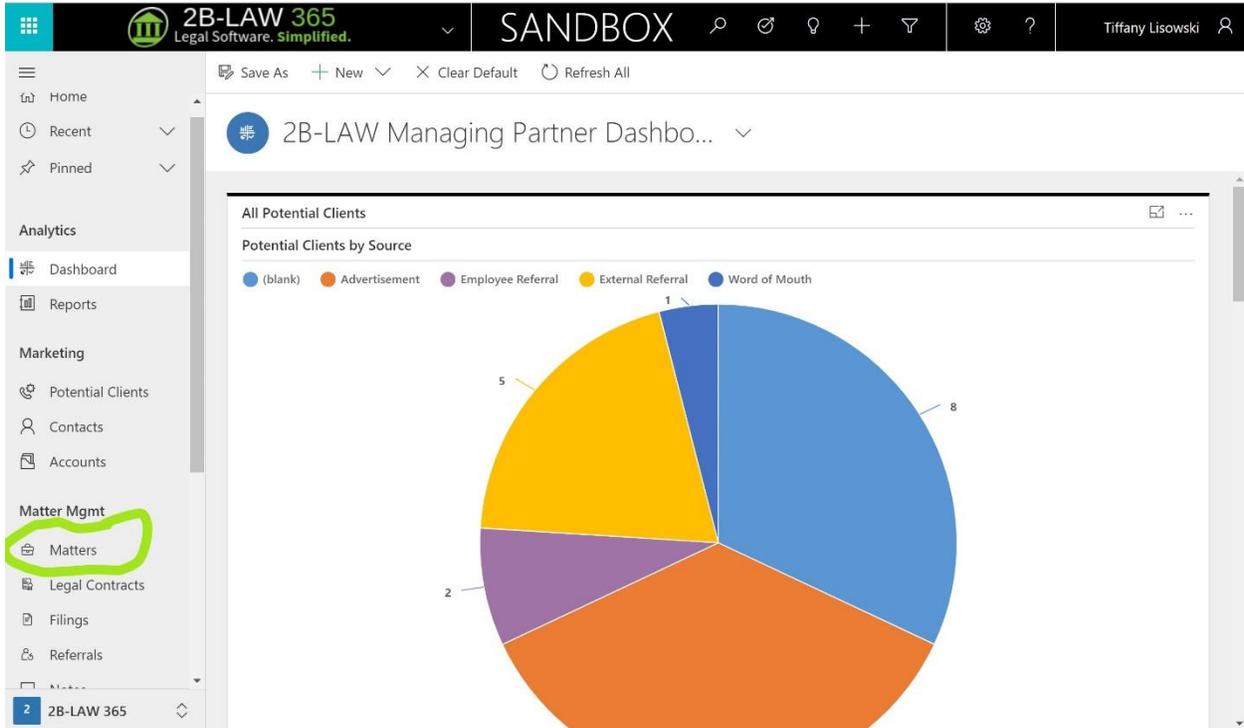
Client: Anthony Avery (Sample)

DESCRIPTION

Active Created On: 7/25/2019 10:40 AM Modified On: 7/25/2019 10:40 AM Save

Creating Pre-Bills from All Unbilled Time and Expenses

- Navigate to 2B-LAW 365 → Matter Mgmt → Matters.



2. Click the top box on Active Matters – All to select all Matters.

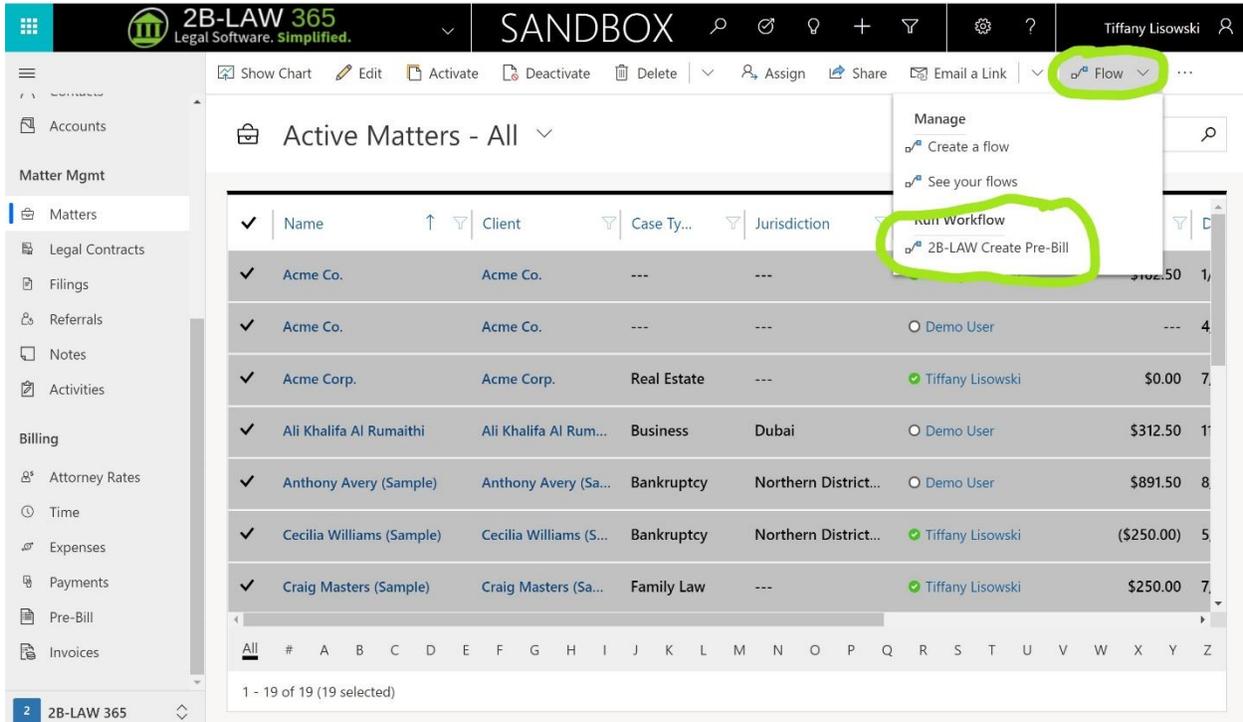
2B-LAW 365 Legal Software. Simplified. **SANDBOX** Tiffany Lisowski

Active Matters - All

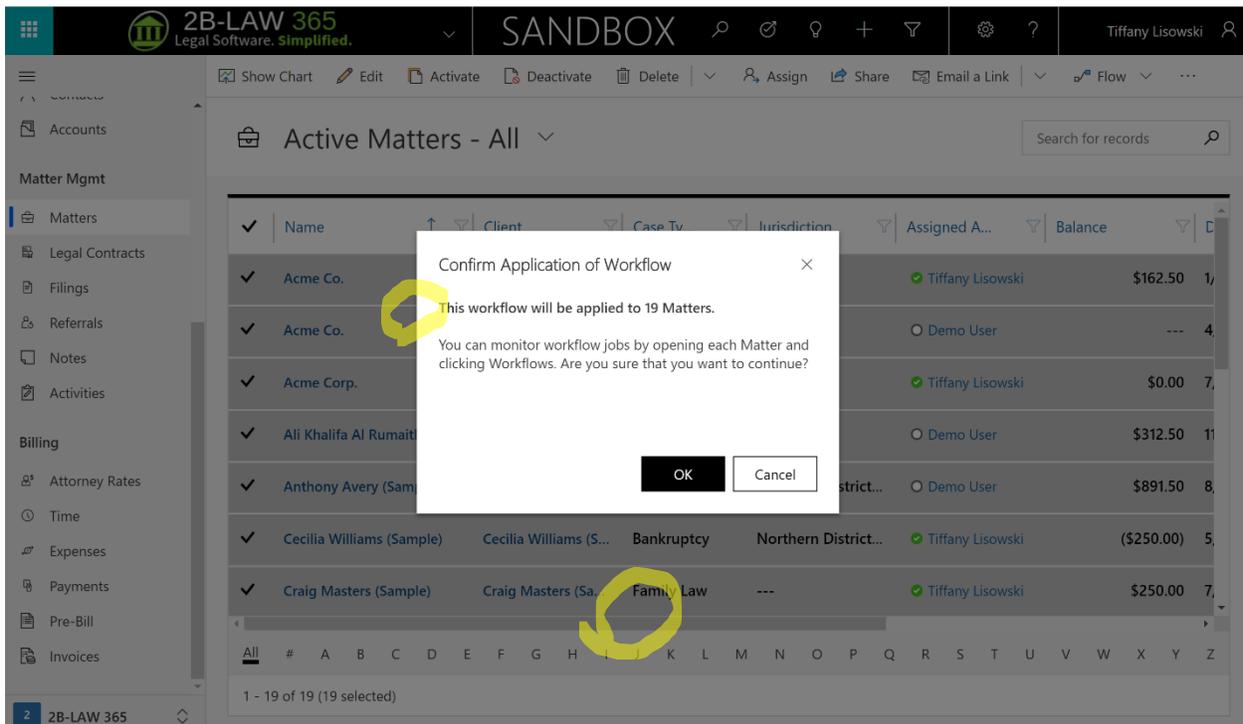
<input checked="" type="checkbox"/>	Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance	D
<input checked="" type="checkbox"/>	Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50	1
<input checked="" type="checkbox"/>	Acme Co.	Acme Co.	---	---	Demo User	---	4
<input checked="" type="checkbox"/>	Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00	7
<input checked="" type="checkbox"/>	Ali Khalifa Al Rumaithi	Ali Khalifa Al Rum...	Business	Dubai	Demo User	\$312.50	1
<input checked="" type="checkbox"/>	Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District...	Demo User	\$891.50	8
<input checked="" type="checkbox"/>	Cecilia Williams (Sample)	Cecilia Williams (S...	Bankruptcy	Northern District...	Tiffany Lisowski	(\$250.00)	5
<input checked="" type="checkbox"/>	Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00	7

1 - 19 of 19 (19 selected)

3. Click the arrow next to Flow and then choose 2B-LAW Create Pre-Bill.



4. Click OK to confirm the creation of Pre-Bills for all unbilled Time and Expense entries.

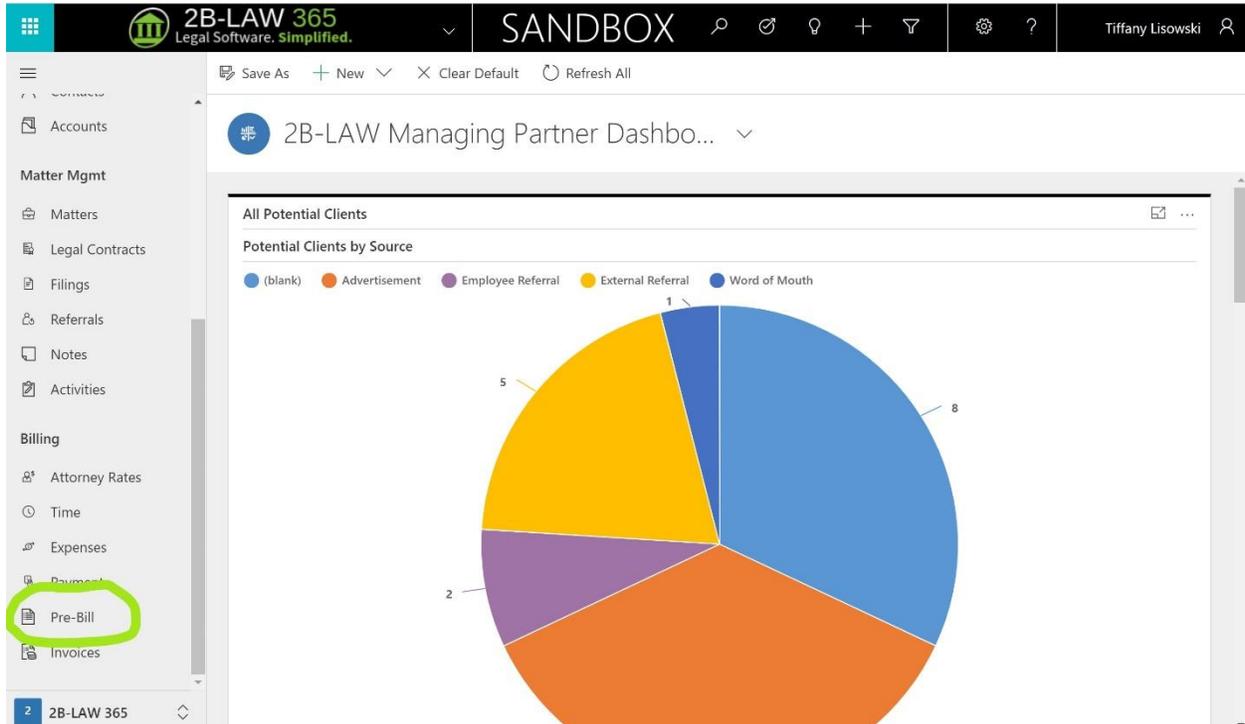


5. Once the workflow has been completed, the Pre-Bills will appear in the Pre-Bill section. See Viewing Pre-Bills.

Viewing Pre-Bills

To see a list of Pre-Bills that have been created on *all* Matters:

1. Navigate to 2B-LAW 365 → Billing → Pre-Bills



2. Within Pre-Bill, the default view shows all Active Pre-Bills. Double-click on the Pre-Bill needed.

All Pre-Bills

Name	Status R...	Total A...	Customer	Email (Customer)
Acme Co.	New	\$0.00	Acme Co.	---
Ali Khalifa Al Rumaithi	Pending	\$862.50	Ali Khalifa Al Rumaithi	---
Anthony Avery (Sample)	Pending	\$324.50	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	\$250.00	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	---	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	\$0.00	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	In Progress	\$594.50	Anthony Avery (Sample)	ant@email.com

1 - 17 of 17 (0 selected)

3. Within the Pre-Bill, all unbilled time and expense items are listed, adjustments can be made, etc.

PRE-BILL Acme Co. Total Amount: \$0.00

Summary Details Related

Product ...	Proper...	Price Per...	Quantity	Disco...	Extended A...
Expense	Not C...	\$100.00	1.00000	---	\$0.00
Legal Ser...	Not C...	\$250.00	0.25000	---	\$0.00

Order ID: ORD-01025-COF2G9
 Name: Acme Co.
 Currency: US Dollar
 Price List: 2B-LAW
 Prices Locked: No

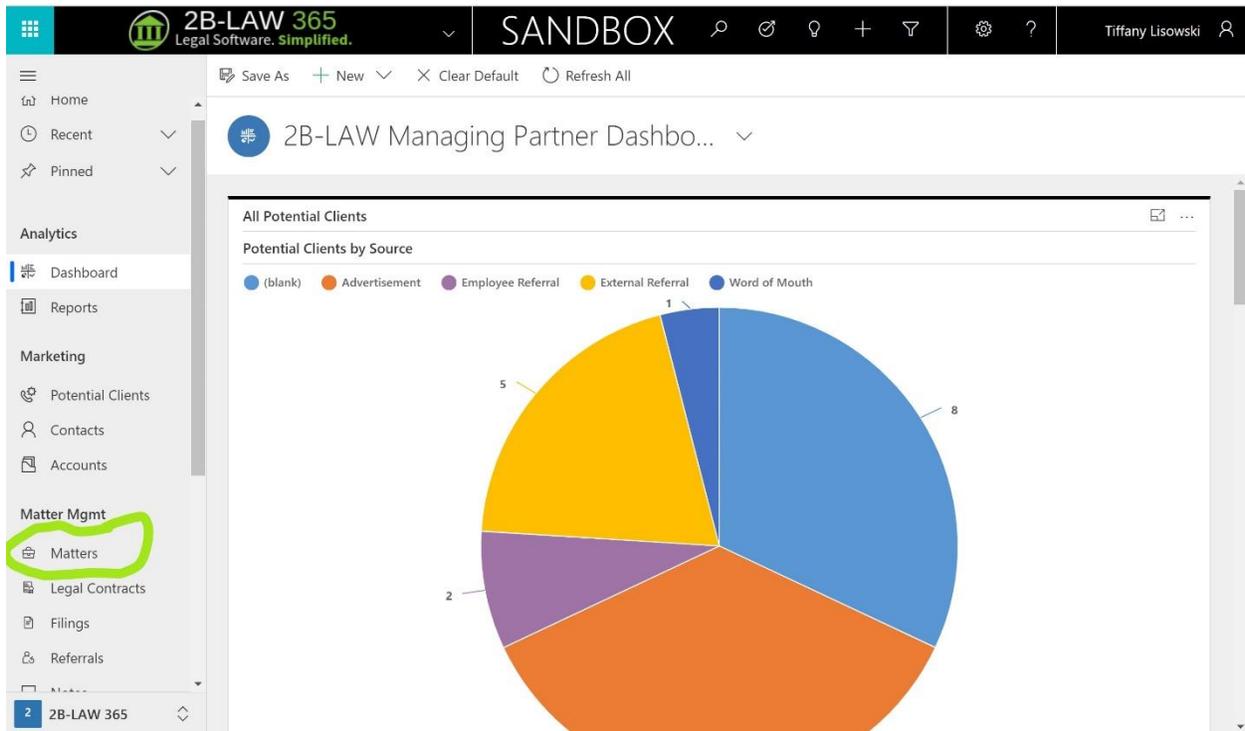
Detail Amount: \$0.00
 (-) Discount (%): ---
 (-) Discount: ---
 (+) Total Tax: \$0.00

Created On: 7/8/2019 12:32 PM

4. Once a Pre-Bill is approved, create an invoice by following the steps in Convert Pre-Bill to Invoice.

To view Pre-Bills created for a *specific Matter*.

1. Navigate to 2B-LAW 365 → Matter Mgmt → Matters



2. Double-click on the Matter to open Matter record.

Active Matters - All

Name	Client	Case Ty...	Jurisdiction	Assigned A...	Balance
Acme Co.	Acme Co.	---	---	Tiffany Lisowski	\$162.50
Acme Co.	Acme Co.	---	---	Demo User	---
Acme Corp.	Acme Corp.	Real Estate	---	Tiffany Lisowski	\$0.00
Ali Khalifa Al Rumaithi	Ali Khalifa Al Ruma...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District ...	Demo User	\$1,706.50
Cecilia Williams (Sample)	Cecilia Williams (Sa...	Bankruptcy	Northern District ...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

1 - 18 of 18 (0 selected)

3. Scroll down Matter form to find the “Active Pre-Bills” section.

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

ACTIVE PRE-BILLS + Add New Pre-Bill ...

Modified On	Total Amo...	Name	Status ...	Customer	Email (Cus...
7/25/2019 10:40 ...	\$0.00	Anthony Avery (Sample)	New	Anthony Avery (Sa...	ant@email
4/3/2019 2:17 PM	\$250.00	Anthony Avery (Sample)	New	Anthony Avery (Sa...	ant@email
4/3/2019 2:14 PM	\$0.00	Anthony Avery (Sample)	New	Anthony Avery (Sa...	ant@email
1/29/2019 1:04 PM	\$324.50	Anthony Avery (Sample)	Pending	Anthony Avery (Sa...	ant@email

1 - 4 of 9 (0 selected) Page 1

4. Double-click on the Pre-Bill that needs to be viewed. The Pre-Bill form will open. Edits can be made to the Pre-Bill.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

PRE-BILL
Anthony Avery (Sample) Total Amount \$0.00

Summary Details Related

Order ID
ORD-01026-Y8N1K3

Name
Anthony Avery (Sample)

Currency
US Dollar

Price List
2B-LAW

Prices Locked
No

Product ...	Proper...	Price Per...	Quantity	Disco...	Extended A...
Expense	Not C...	\$25.00	1.00000	---	\$0.00
Expense	Not C...	\$110.00	1.00000	---	\$0.00
Legal Ser...	Not C...	\$250.00	1.00000	---	\$0.00
Legal Ser...	Not C...	\$0.00	0.50000	---	\$0.00

Detail Amount \$0.00

(-) Discount (%) ---

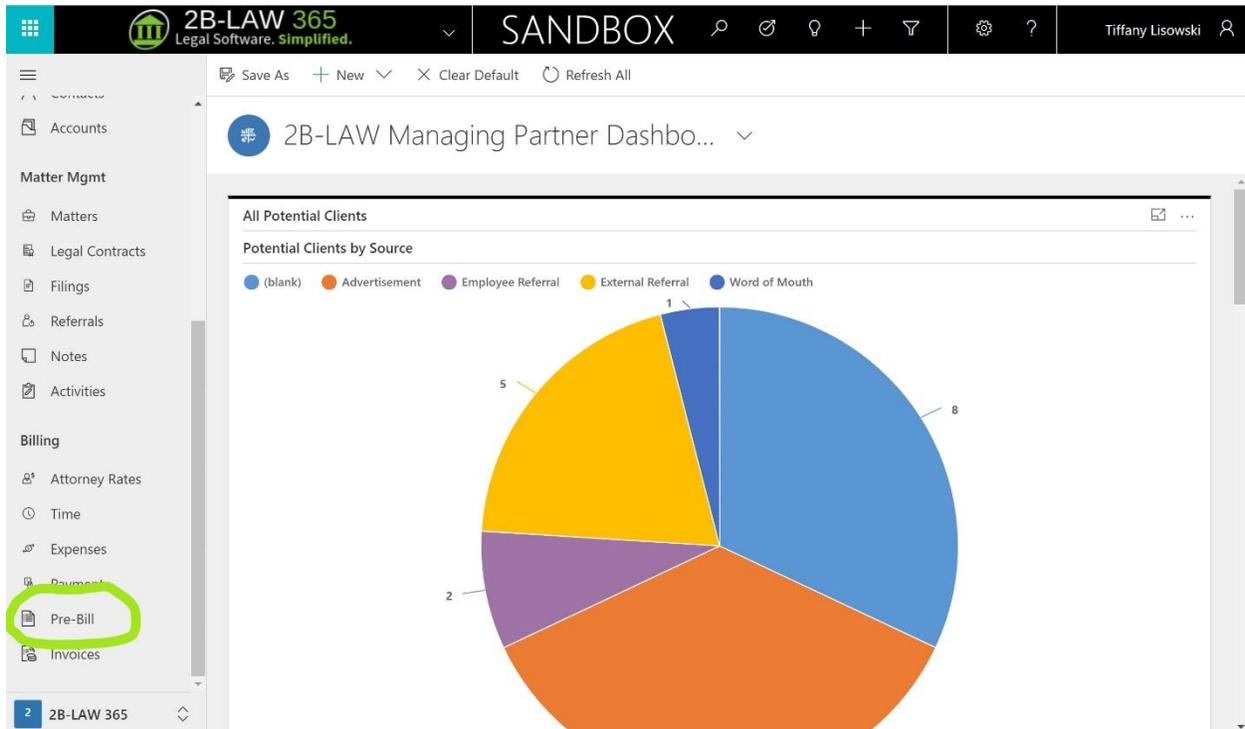
ADDRESSES

2B-LAW 365 Active Created On: 7/25/2019 10:40 AM Save

5. NOTE: The most recent Pre-Bill can be viewed by clicking the link located in the Billing section of the Matter form under "Last Pre-Bill".

Creating Invoices

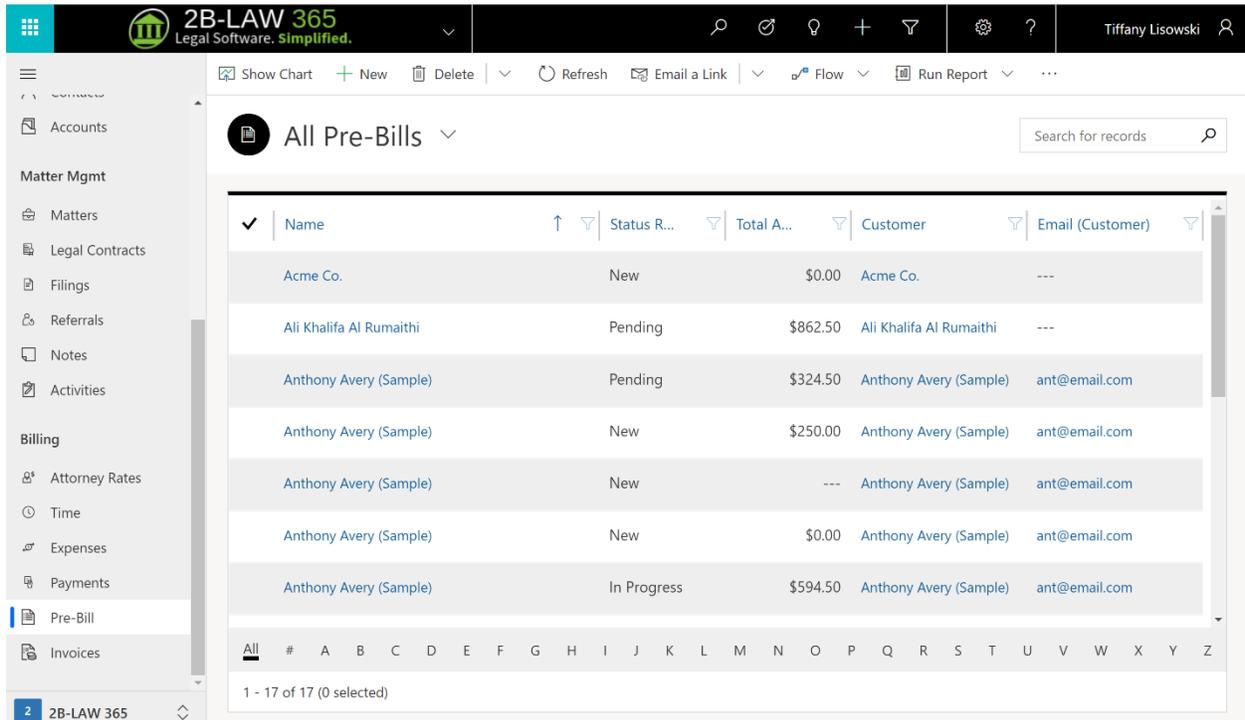
1. Navigate to 2B-LAW 365 → Billing → Pre-Bills



The screenshot shows the 2B-LAW 365 interface. The left sidebar has a green circle around the 'Pre-Bill' option under the 'Billing' section. The main content area shows a dashboard for '2B-LAW Managing Partner Dashbo...' with a pie chart titled 'All Potential Clients' and 'Potential Clients by Source'. The pie chart data is as follows:

Source	Count
(blank)	8
Advertisement	2
Employee Referral	5
External Referral	1
Word of Mouth	8

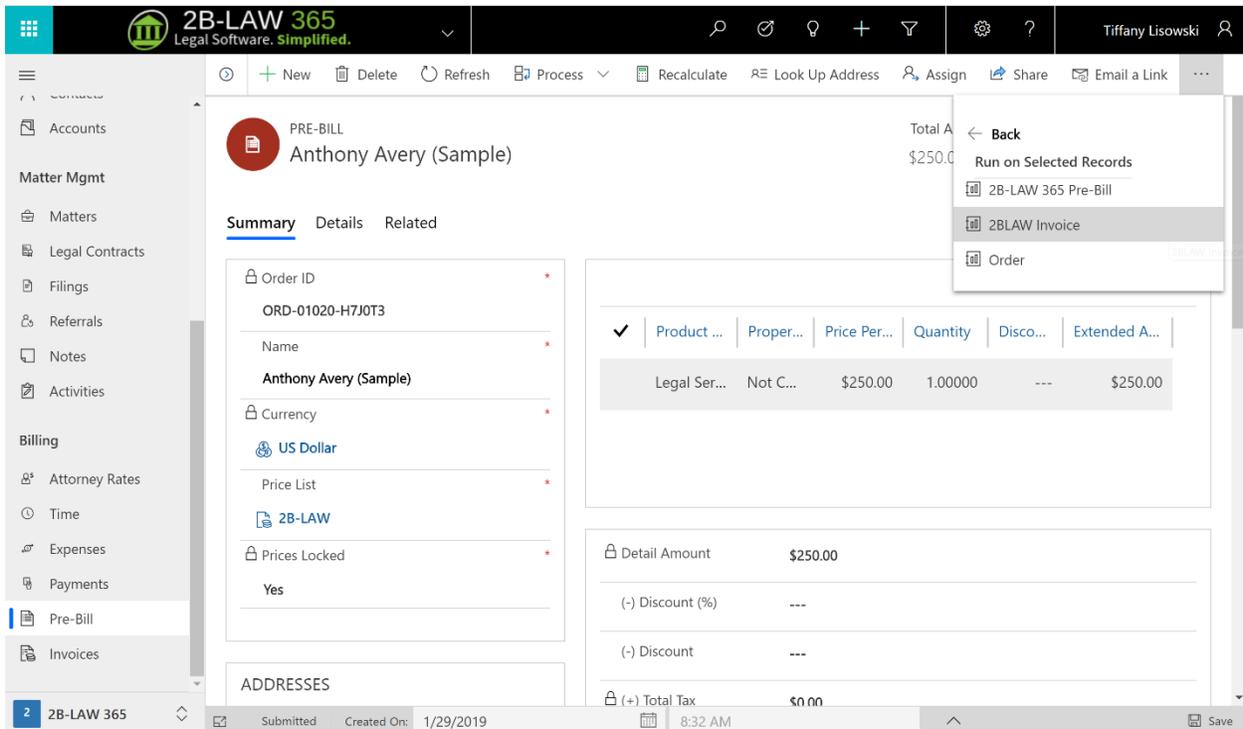
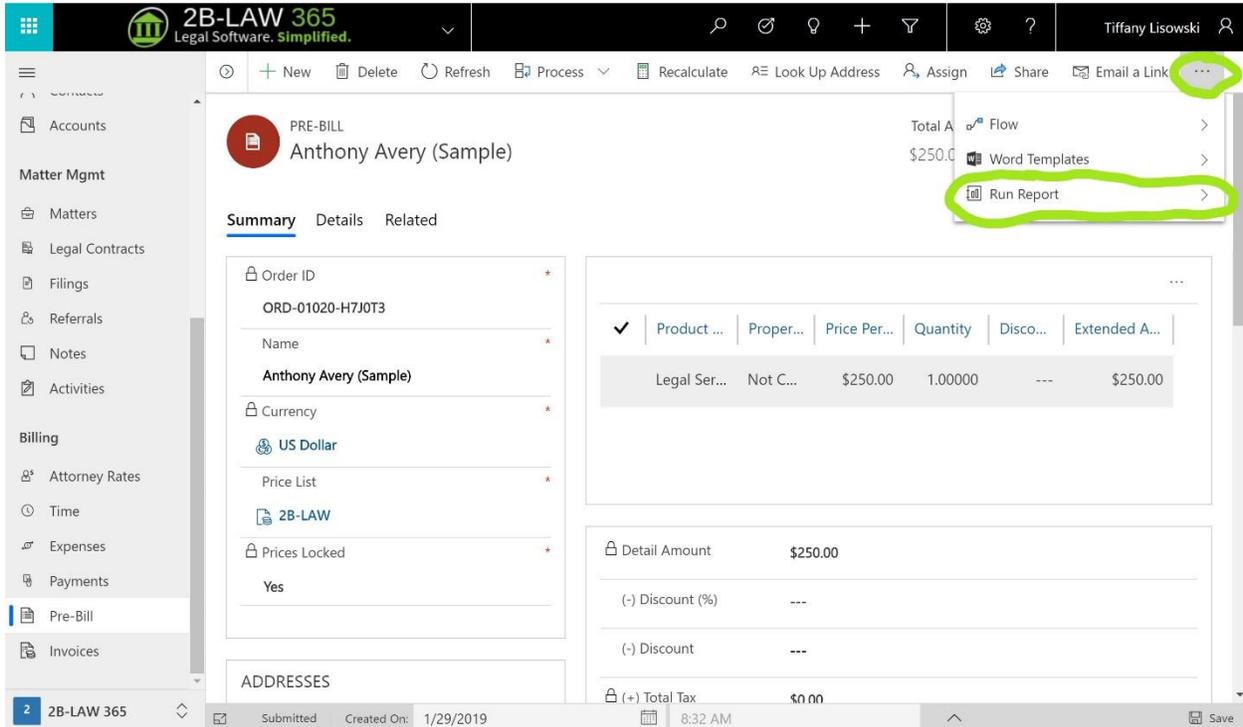
2. Within Pre-Bill, the default view shows all Active Pre-Bills. Double-click on the Pre-Bill needed.



The screenshot shows the 'All Pre-Bills' view in the 2B-LAW 365 interface. The table below lists the pre-bills:

Name	Status	Total A...	Customer	Email (Customer)
Acme Co.	New	\$0.00	Acme Co.	---
Ali Khalifa Al Rumaithi	Pending	\$862.50	Ali Khalifa Al Rumaithi	---
Anthony Avery (Sample)	Pending	\$324.50	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	\$250.00	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	---	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	New	\$0.00	Anthony Avery (Sample)	ant@email.com
Anthony Avery (Sample)	In Progress	\$594.50	Anthony Avery (Sample)	ant@email.com

3. Once the Pre-Bill has been edited and approved, navigate to ... → Run Report → 2BLAW Invoice.



4. A customizable Invoice will be created.

Edit Filter

Navigation bar with icons for back, forward, search, refresh, zoom (100%), save, and print.

Invoice

Client: Anthony Avery (Sample)

Invoice Amount: \$250.00

Re: Anthony Avery (Sample)

Invoice Date: 1/29/2019

Current Charges:

Date	Description	Attorney	Quantity	Billing Rate	Line Total
1/29/2019		TR	1.00000	\$250.00	\$250.00
Subtotal:					\$250.00
Discount (%):					
Discount (\$):					
Invoice Total:					\$250.00

HELPFUL LINKS

Although there are some “out-of-the-box” configurations which suit the User perfectly, most of the time that is not the case. For instance, the User will often want to modify the forms, form fields, views, etc. Because 2B-LAW 365 was built on Dynamics 365, the configuration tools for Dynamics 365 can be used within 2B-LAW 365 as well. The following are the most commonly asked for configurations.

In addition to the custom configurations, most Users are going to want to take advantage of the integrations between Dynamics 365, 2B-LAW 365 and other Microsoft products (SharePoint, OneNote, Outlook, Word, etc.) See links below for more information on these integrations as well.

If unfamiliar with the functionality of **Microsoft Dynamics 365**, the basics are covered at <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/basics-guide>. As the following subjects are far from exhaustive of the features of Dynamics 365 or 2B-LAW 365, more information can be found at <https://docs.microsoft.com/en-us/dynamics365>.

Create or Edit Dashboards

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-dashboards>

Create and Edit Fields (Attributes)

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-fields>

Create and Design Forms

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-design-forms>

Create and Edit Views

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-views>

Create Connections to Define and View Relationships Between Records

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/create-connections-view-relationships-between-records>

Set up Dynamics 365 (online) to use SharePoint

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-dynamics-365-online-to-use-sharepoint-online>

Set up OneNote Integration

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-onenote-integration-in-dynamics-365>

Dynamics 365 App for Outlook User Guide

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-app/dynamics-365-app-outlook-user-s-guide>

Word Templates within Dynamics 365

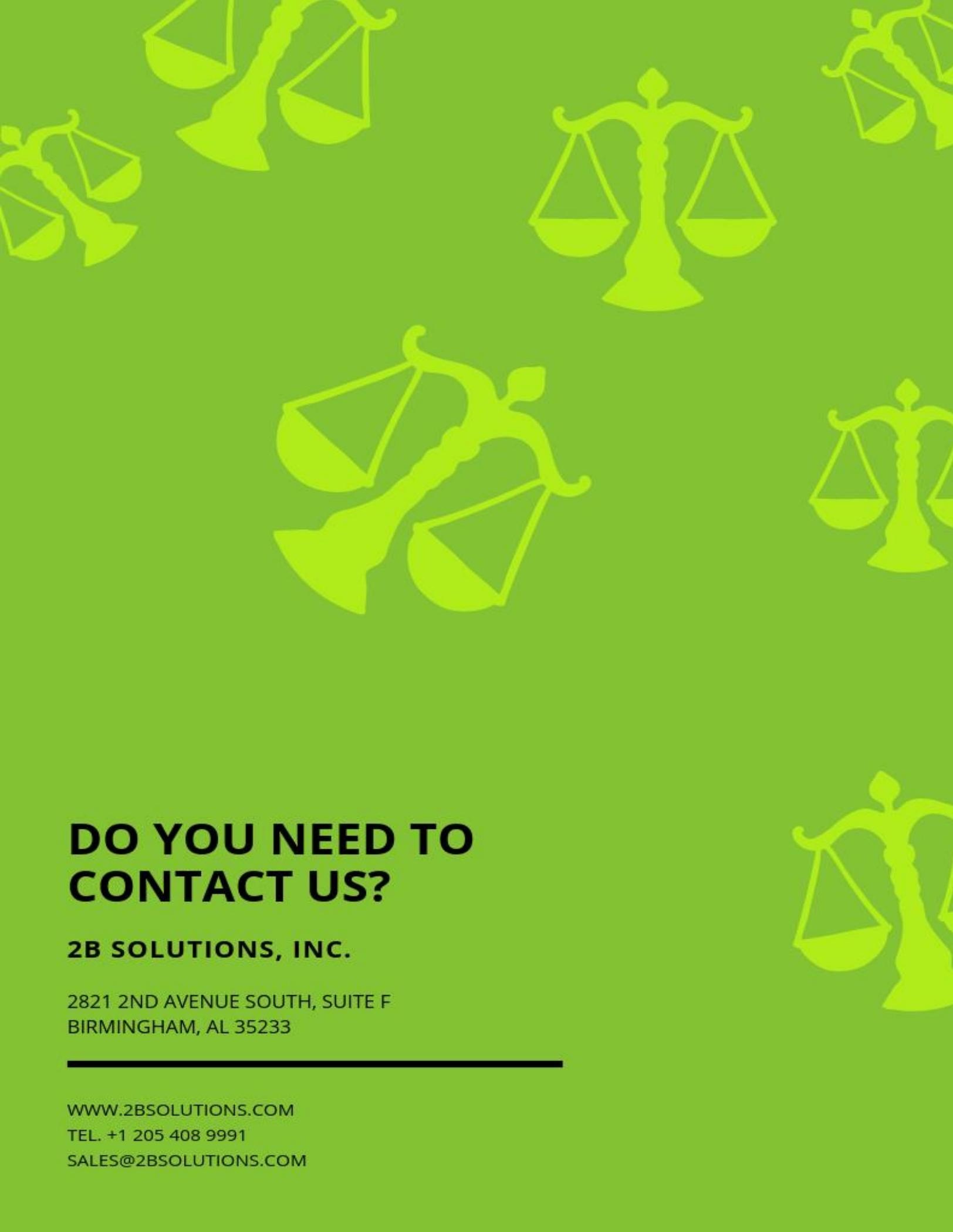
<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365>

Excel Templates within Dynamics 365

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/analyze-your-data-with-excel-templates>

ABOUT 2B SOLUTIONS, INC.

2B Solutions, Inc. specializes in custom building Dynamics 365 and mobile applications to allow our customers to manage any kind of resources from company car/truck fleets, to medications throughout a pharmacy, to dog trainers and their schedules. We improve the ability of businesses to respond to their customers and critical events from anywhere. Our custom mobile applications include a complete mobile inventory and store management application for retailers and warehouses. 2B Solutions has also developed mobile applications for mobile sales, asset tracking and event tracking. We are a Microsoft Partner with competencies in Microsoft Mobility Solutions, Microsoft Business Solutions and ISV/Software Solutions.

The background of the entire page is a repeating pattern of scales of justice icons. The icons are rendered in a light blue color against a white background. They are arranged in a grid-like pattern, with some icons appearing larger than others. The scales are depicted with two pans hanging from a central beam, supported by a decorative base.

DO YOU NEED TO CONTACT US?

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