2B-LAW 365

Legal Software. **Simplified.**

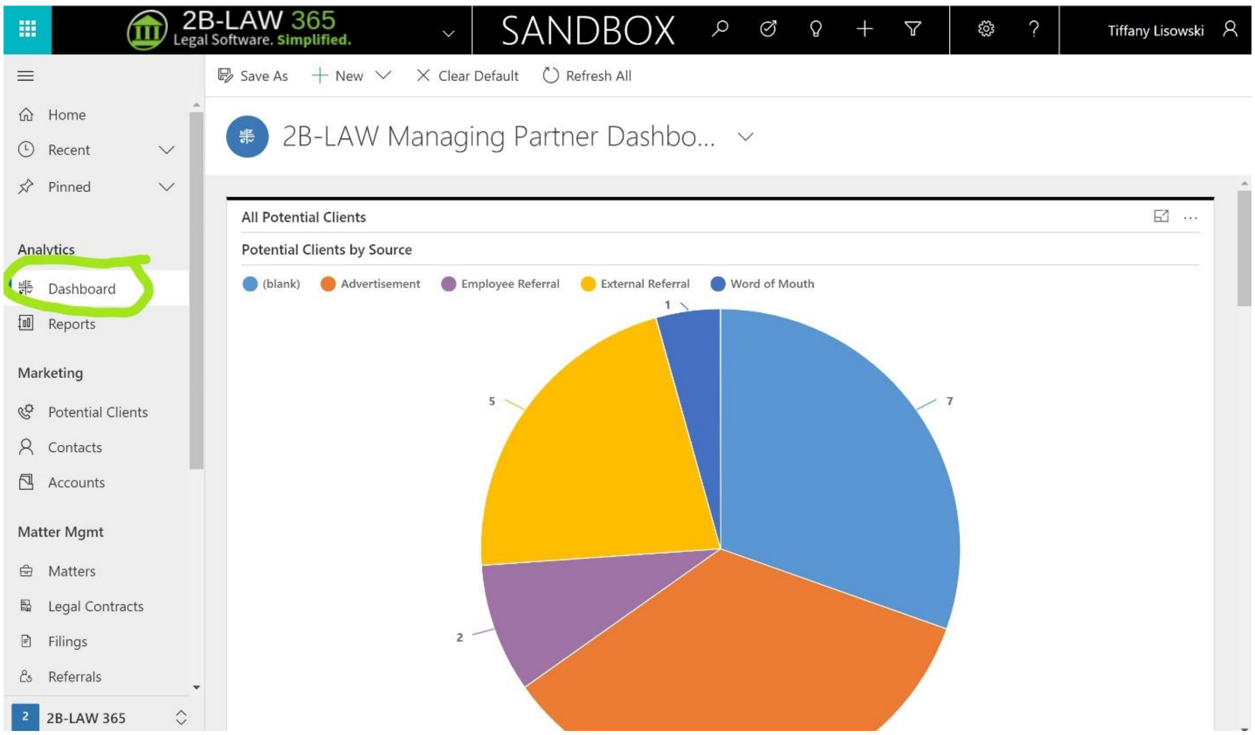
USER GUIDE

for Microsoft Dynamics 365 Unified Interface

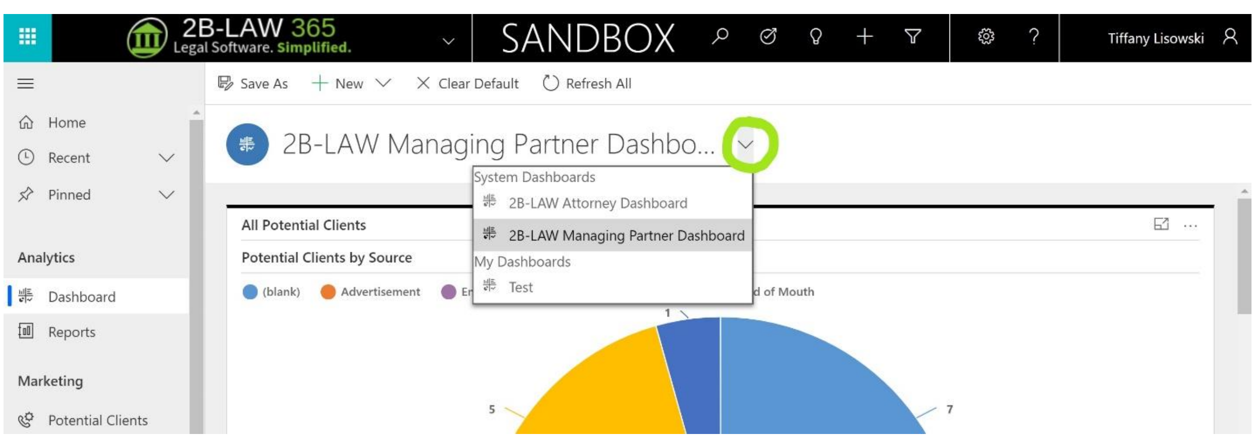
DASHBOARDS - 2B-LAW 365

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".**



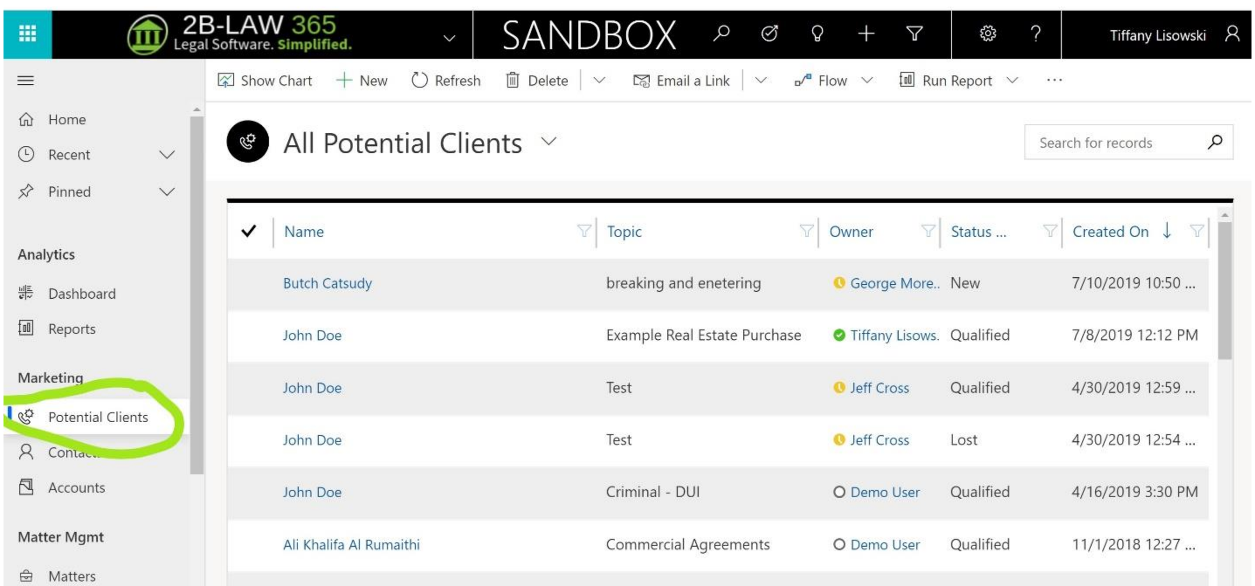
NAVIGATING THE MARKETING SECTION OF 2B-LAW 365

Creating a New Potential Client

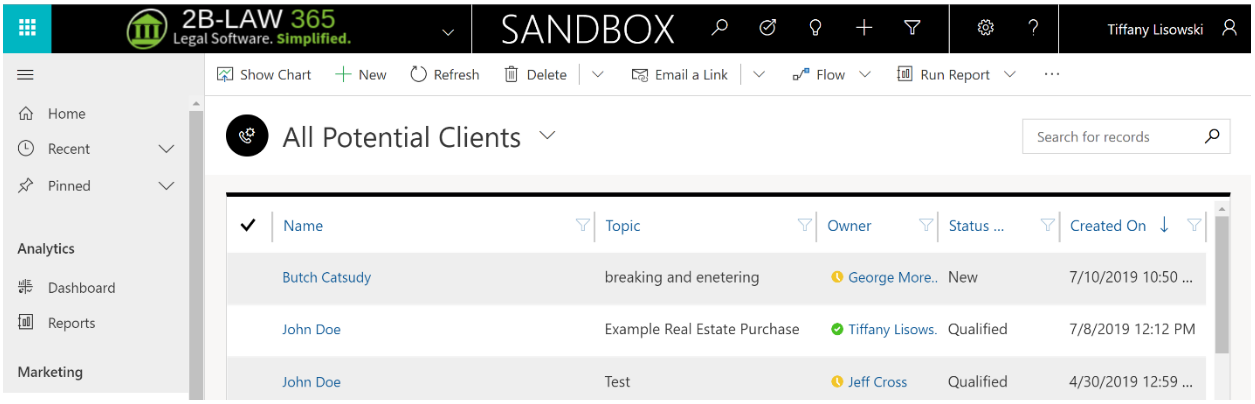
When a potential client contacts the firm, you will want to capture all the relevant information within Potential Client.

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.

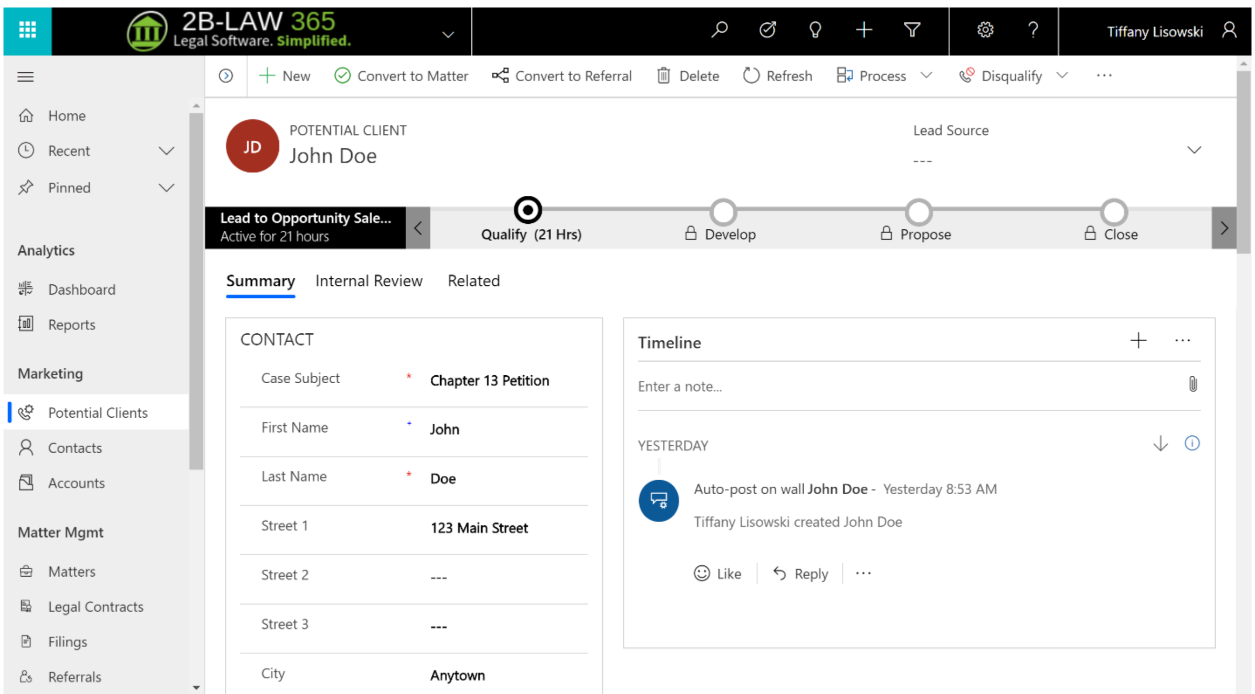
1. Navigate to 2B-LAW → Marketing → Potential Client. After choosing Potential Client, you will see a view of all Potential Clients.



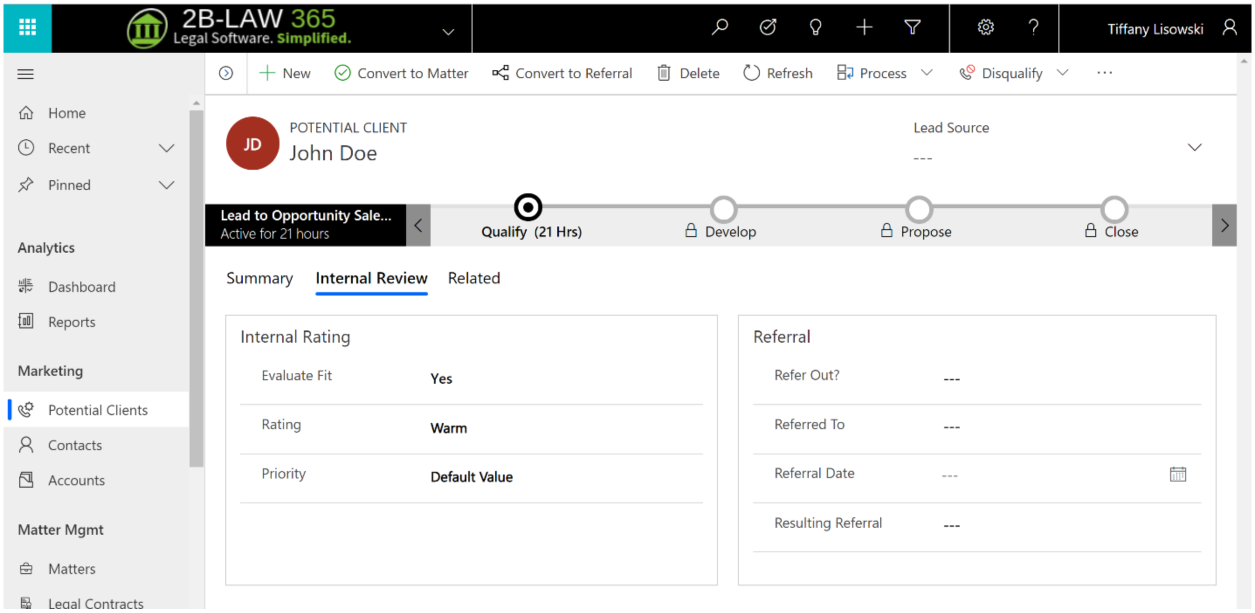
2. Choose +New to add a new Potential Client.



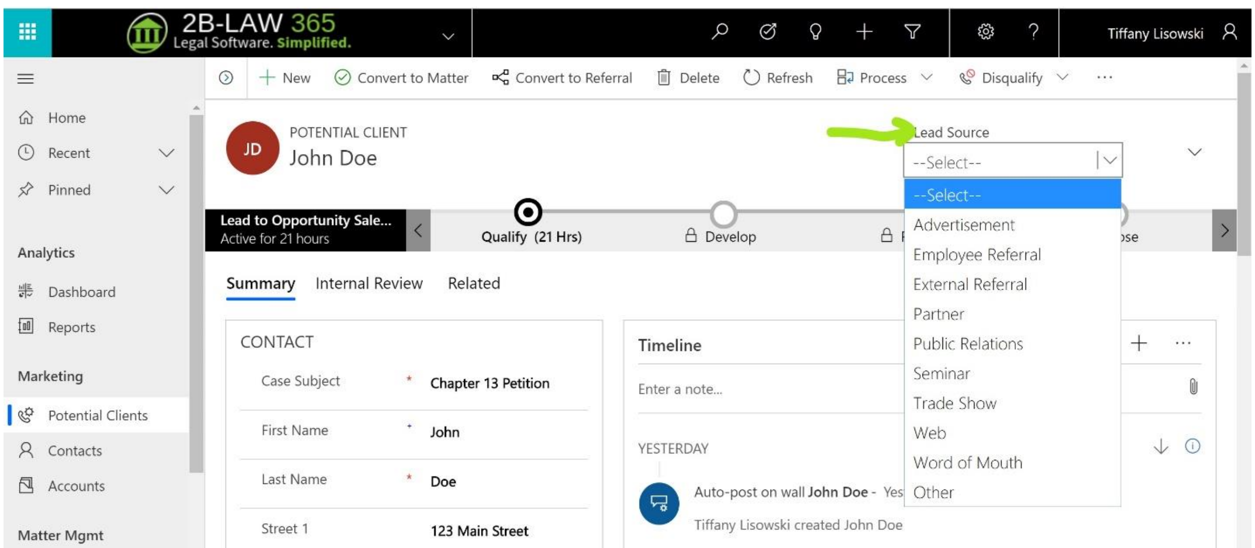
3. Add information on Potential Client.



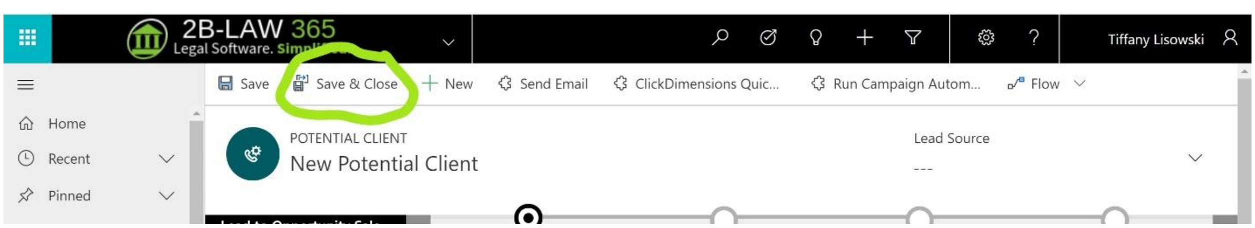
a. Most demographical information can be found under the Summary section seen above.
b. To capture information on whether the Potential Client is a good fit for the firm or if the Potential Client will be referred to another firm, click on "Internal Review".



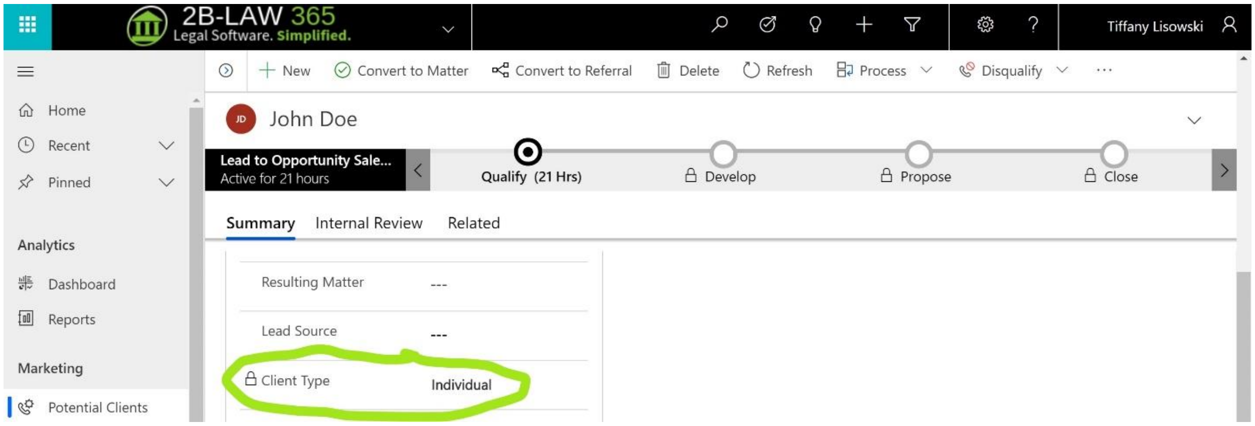
4. To track the source of a new Potential Client, use the “Lead Source” field on the top of the page. This information can be used to create Dashboards and Reports showing leads by source.



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



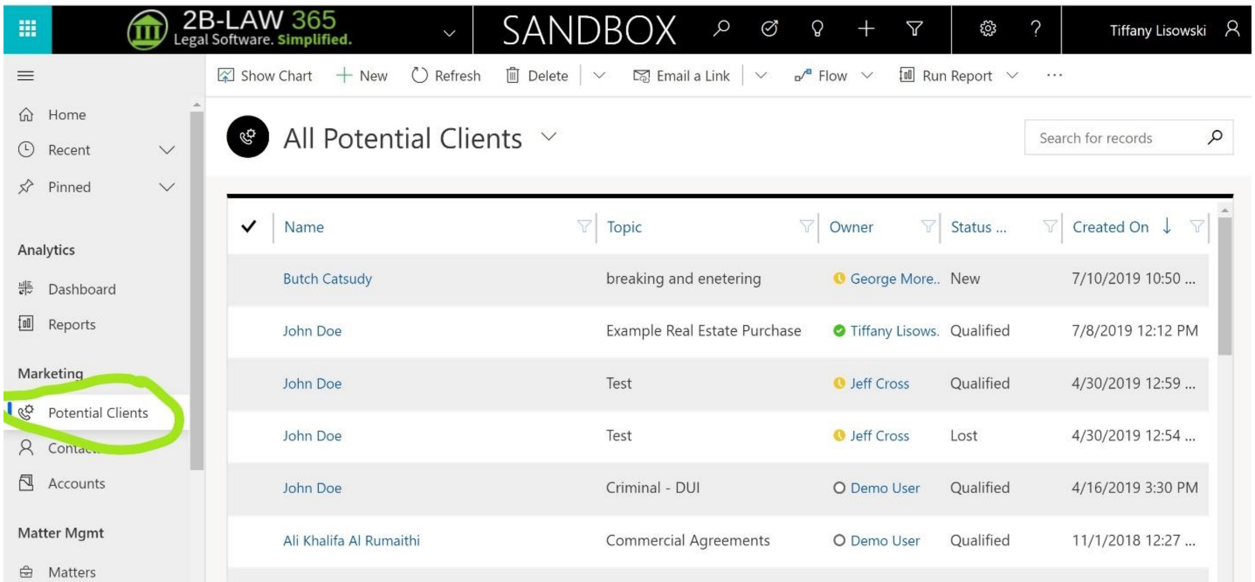
6. **NOTE:** If no company information is entered, the “Client Type” field will read “Individual”. If company information is entered for the Potential Client, the “Client Type” can be either an individual or a company.



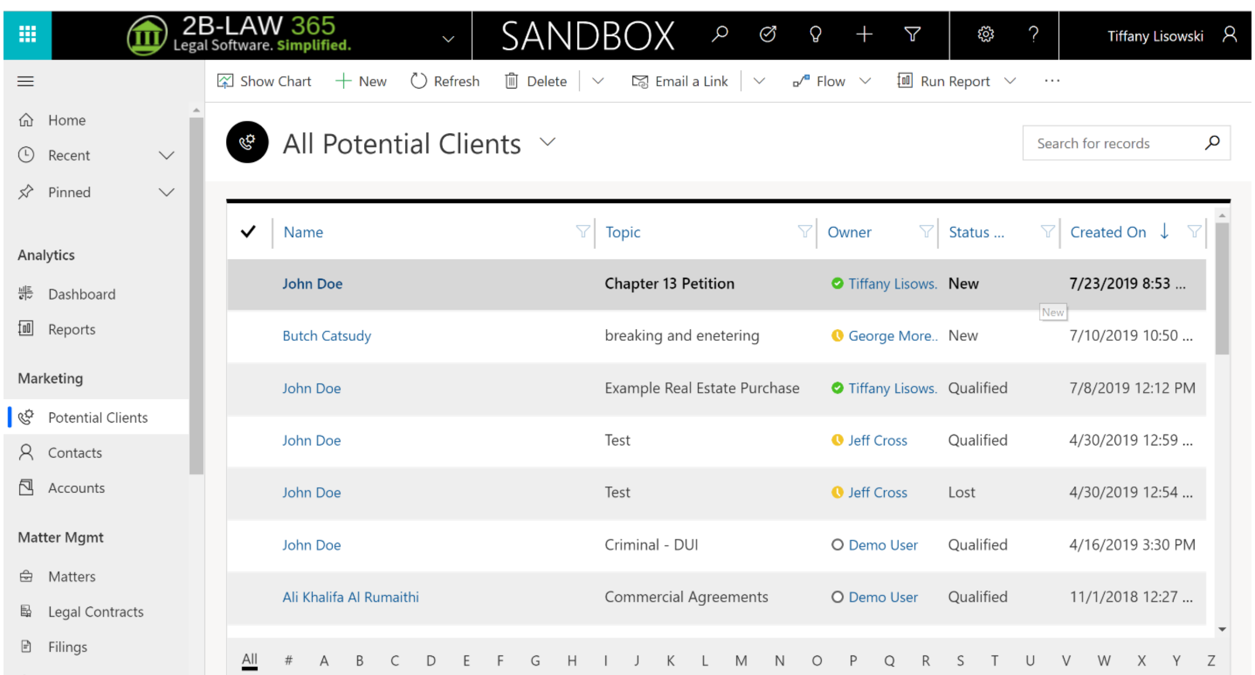
Convert a Potential Client into an Active Matter

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

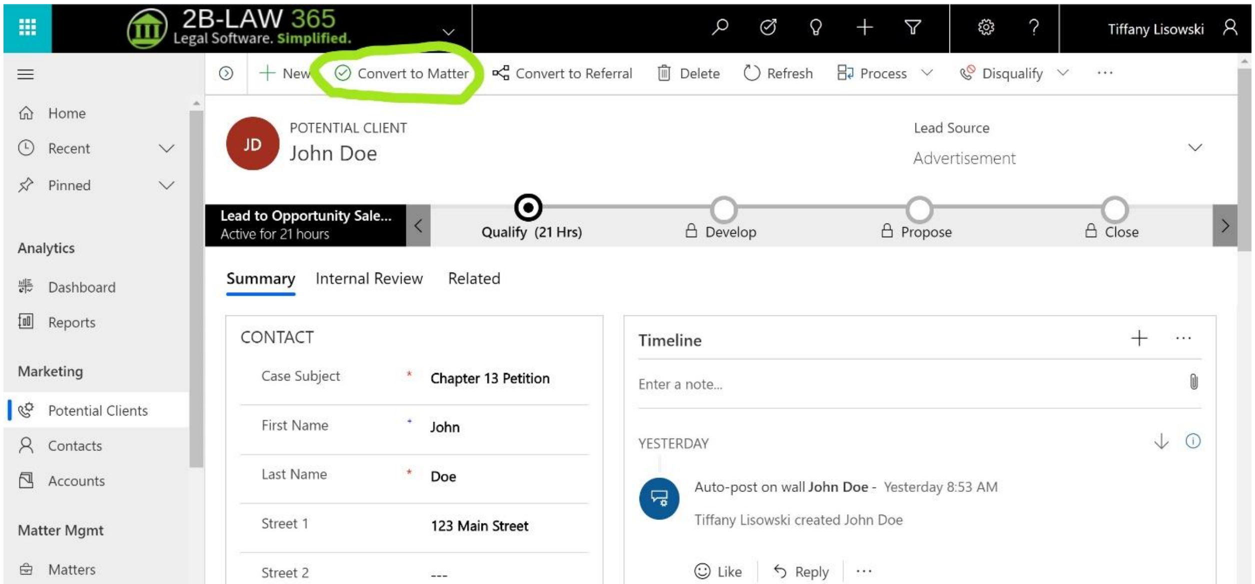
1. Navigate to 2B-LAW → Marketing → Potential Client



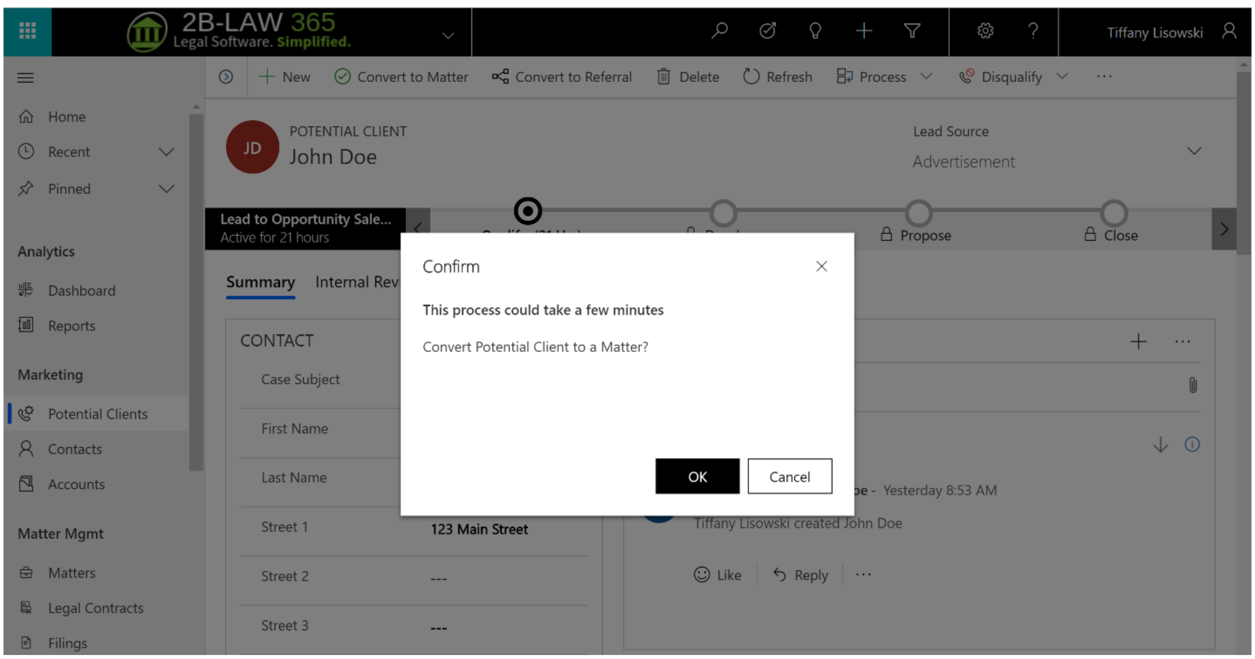
2. From the Potential Client view, choose the Potential Client and double-click or search for the Potential Client using the Search for Records option.



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

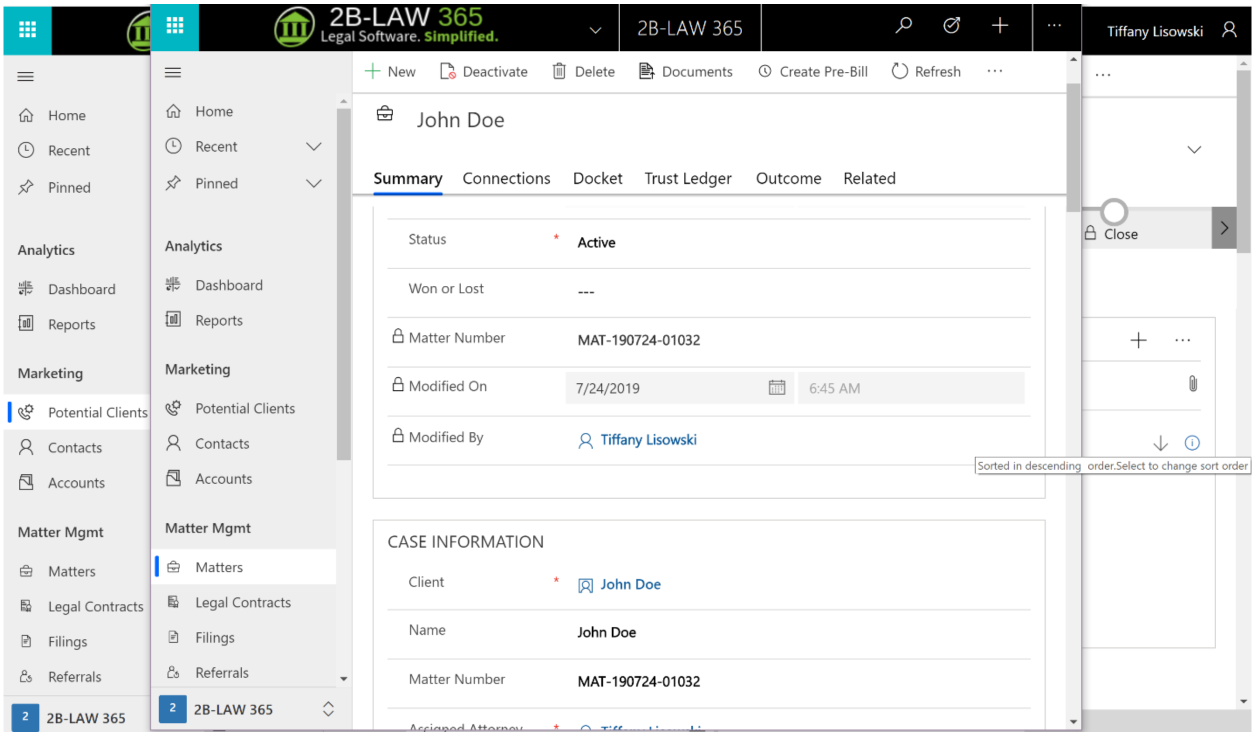


4. When asked to confirm, click okay (or cancel if you have reached this step in error).



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).

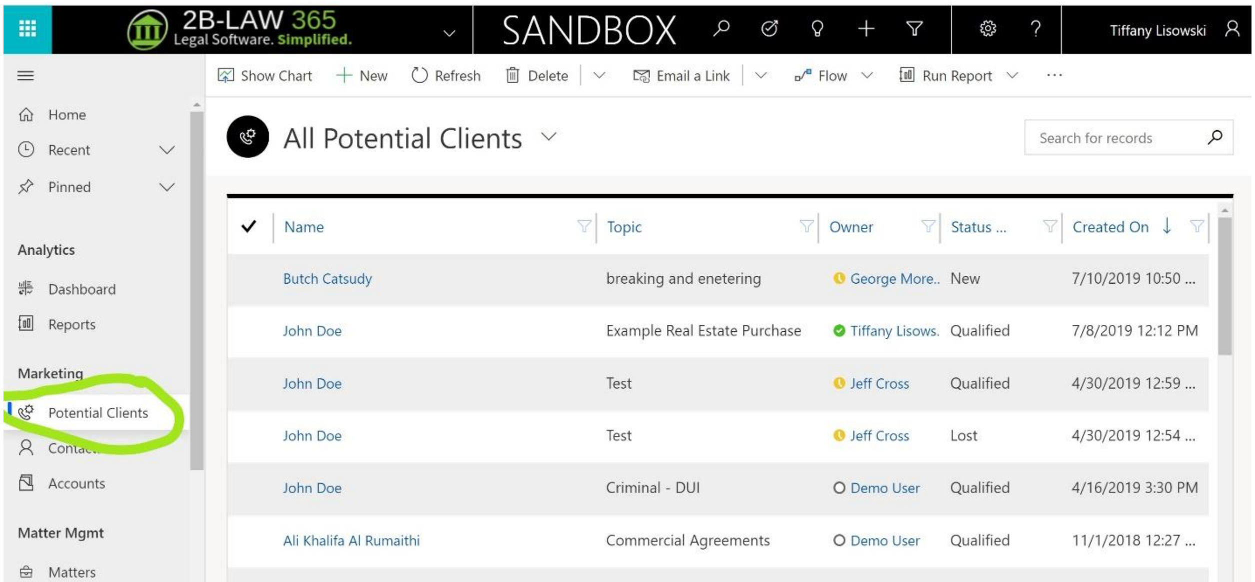
NOTE: When a Potential Client is converted to a Matter, a Contact will be created from the Potential Client "Name" field. If the Potential Client is a company, an Account will be created from the "Company" field.



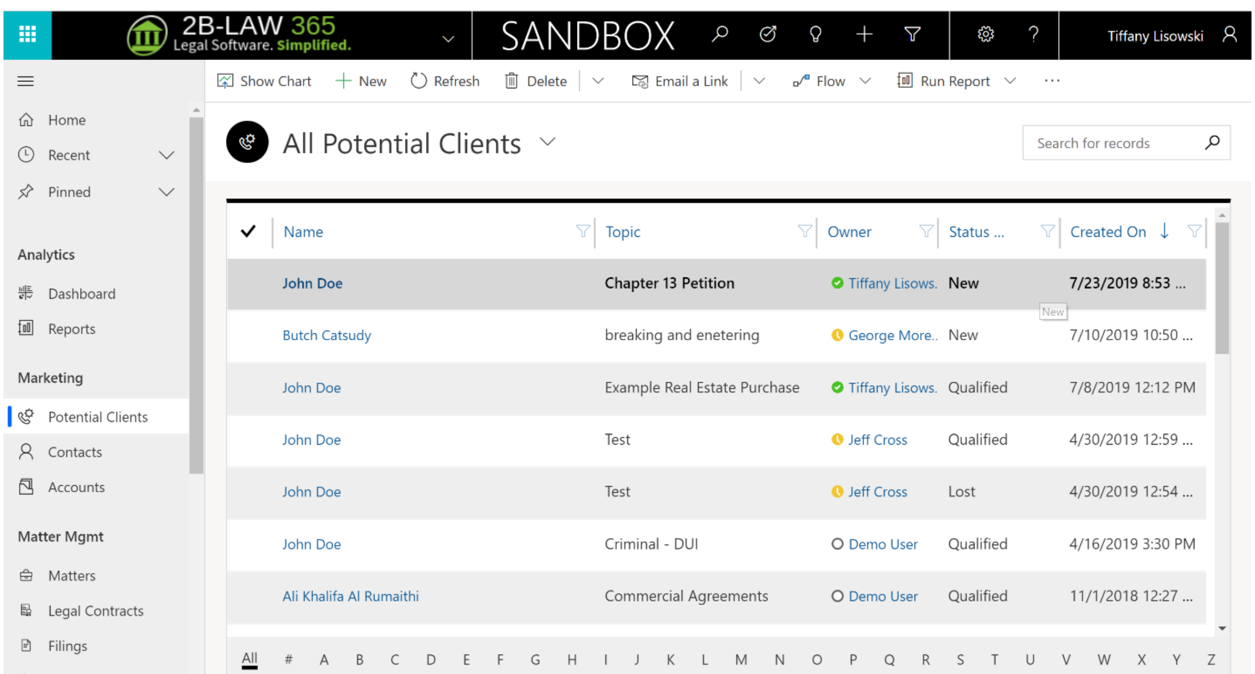
Convert a Potential Client into a Referral

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.

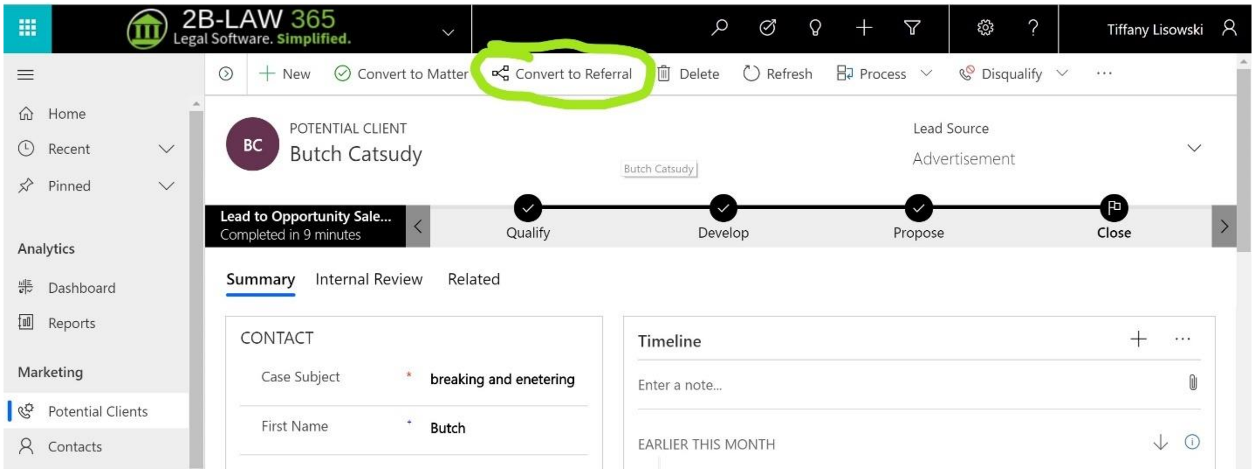
1. Navigate to 2B-LAW → Marketing → Potential Client



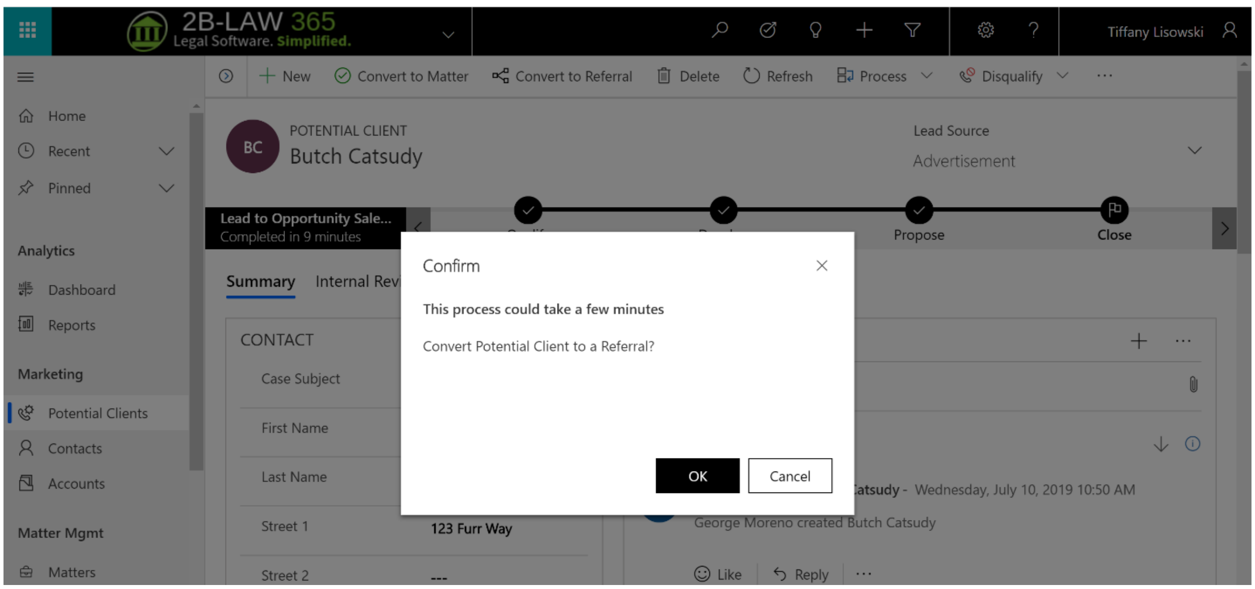
2. From the Potential Client view, choose the Potential Client and double-click or search for the Potential Client using the Search for Records option.



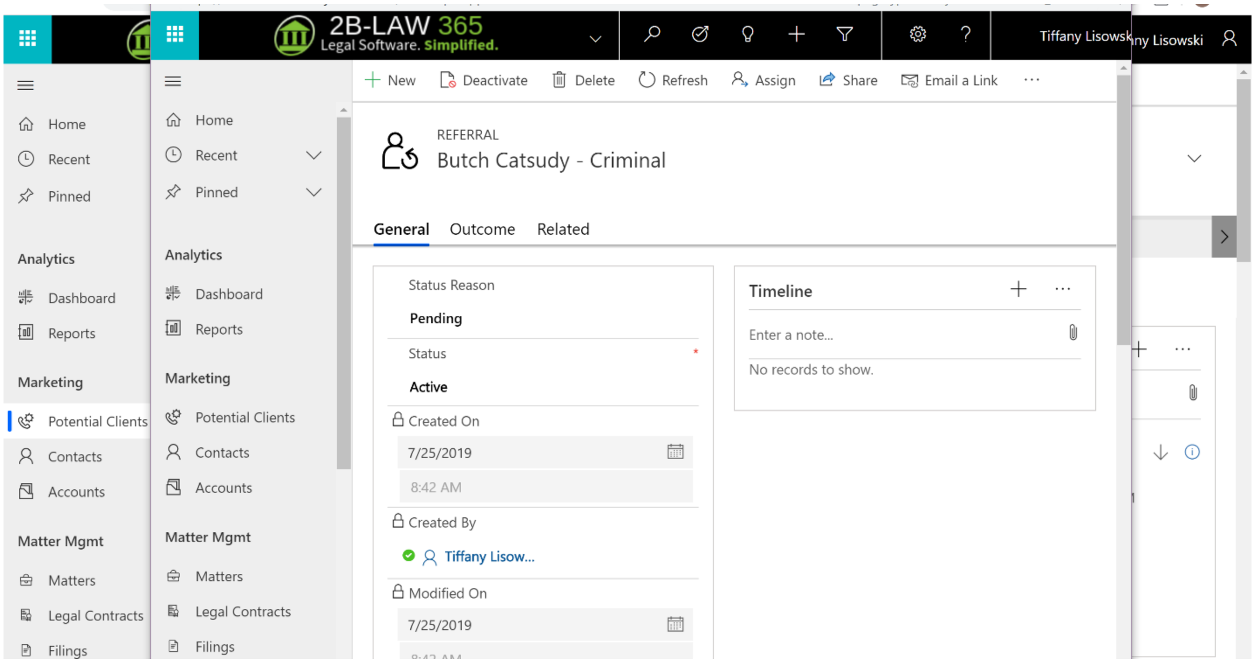
3. Once inside of the Potential Client record, simply click "Convert to Referral".



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



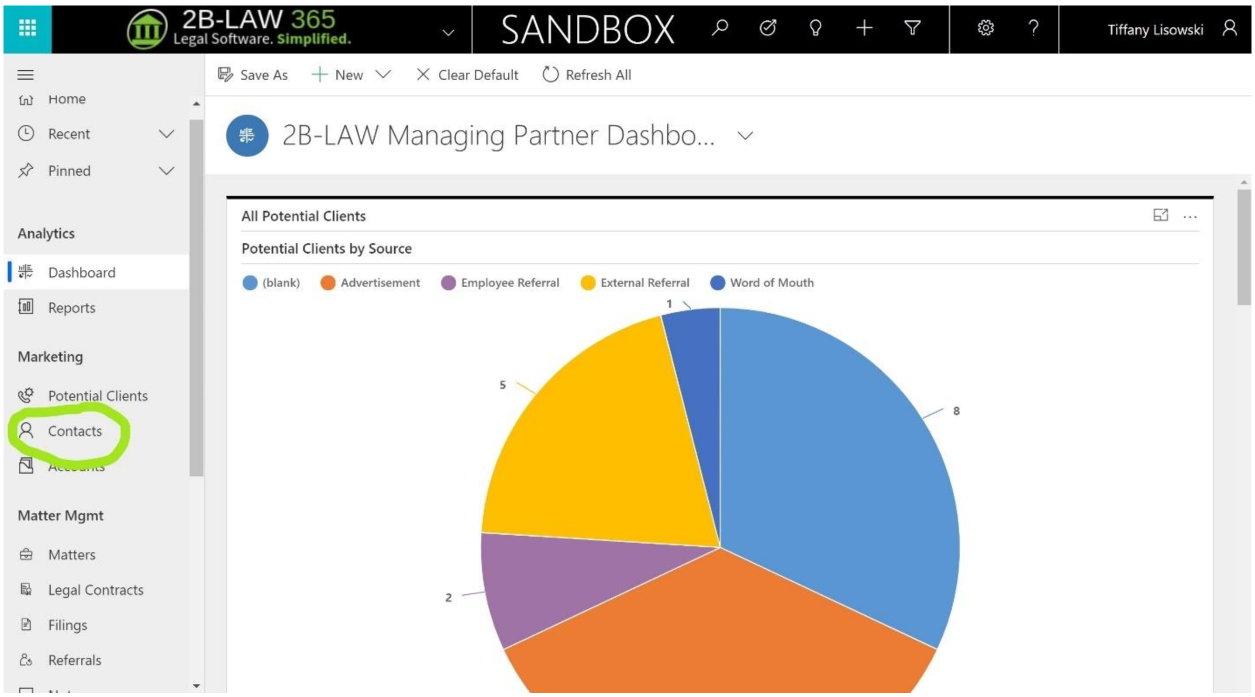
5. A "Referral" record has been created for the Potential Client. *If the record did not automatically pop-up, please check your pop-up blocker settings.* Here, all the pertinent referral information can be entered.


2B-LAW 365
Legal Software. Simplified.
Tiffany Lisowski
New
Deactivate
Delete
Refresh
Assign
Share
Email a Link
Home
Recent
Pinned
Analytics
Dashboard
Reports
Marketing
Potential Clients
Contacts
Accounts
Matter Mgmt
Matters
Legal Contracts
Filings
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.

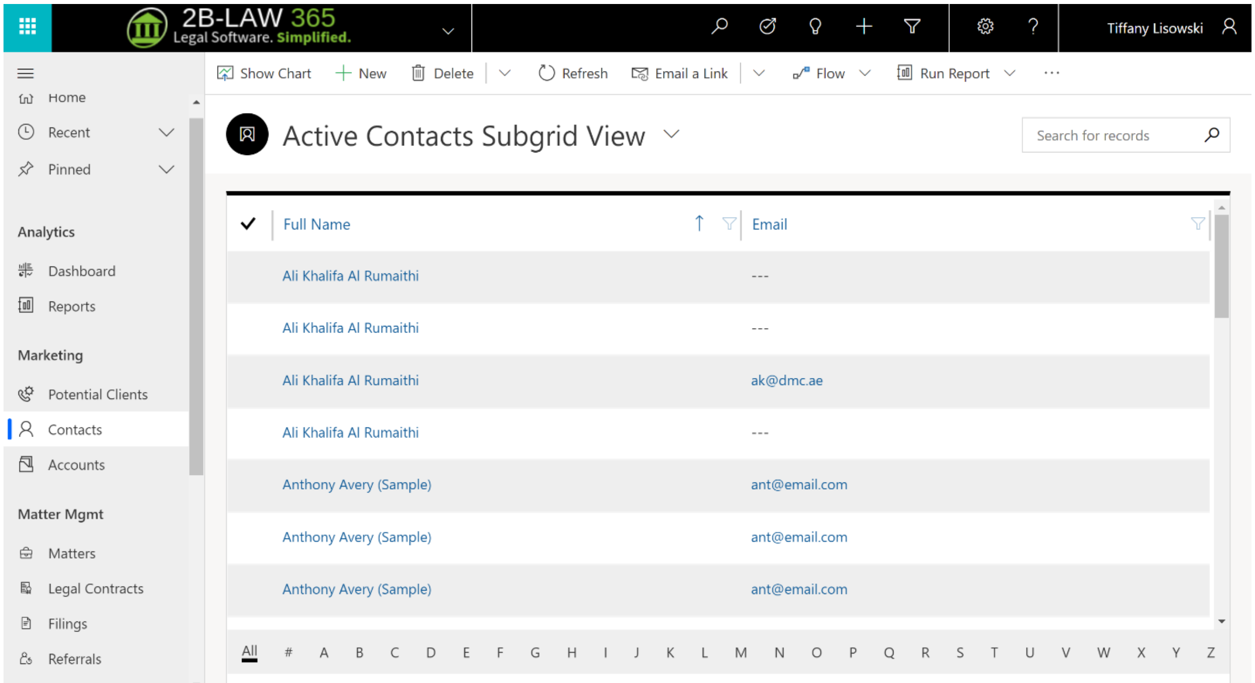
Creating New Contacts

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.*

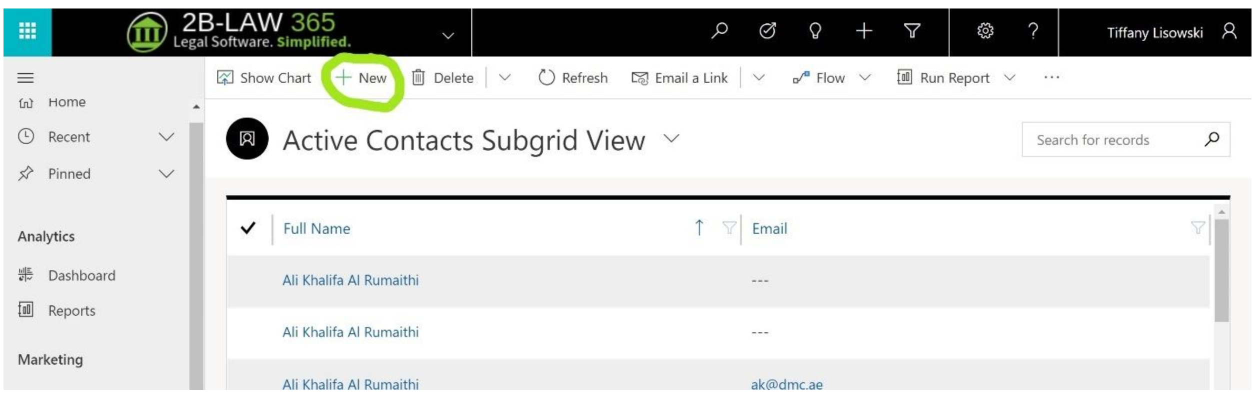
1. **Navigate to 2B-LAW → Marketing → Contact**



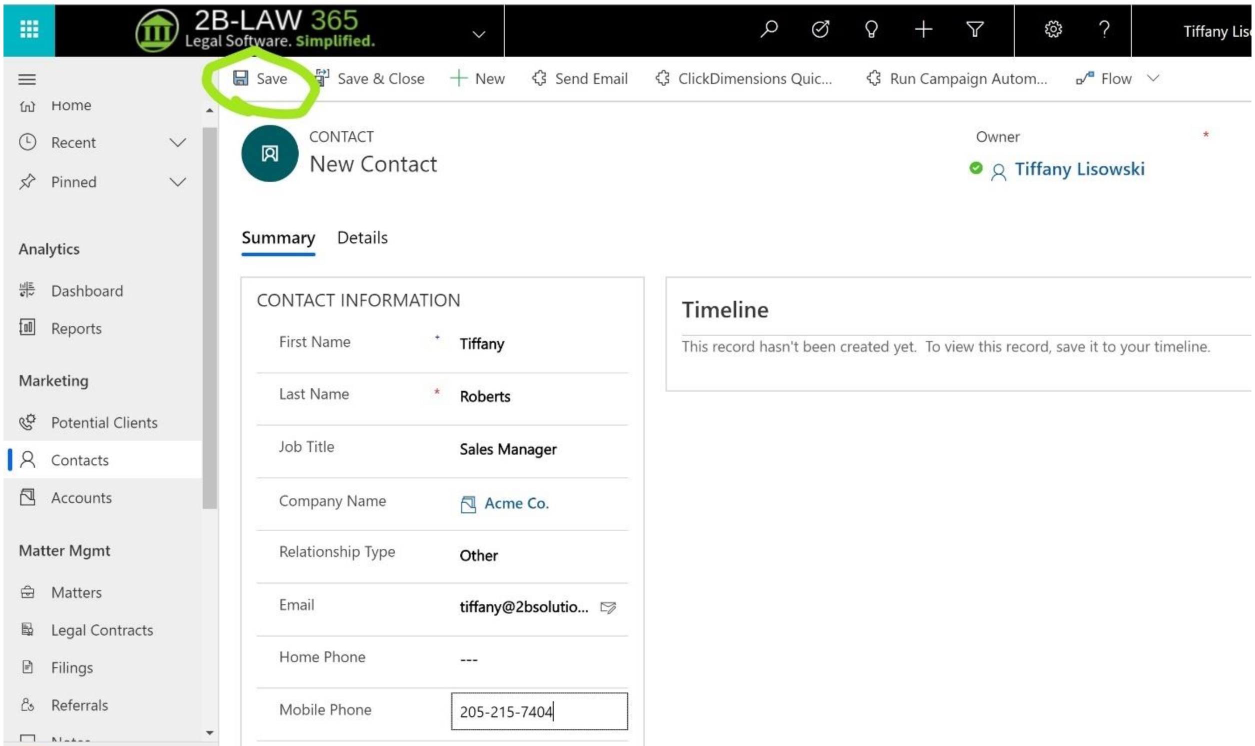
2. **Within Contacts, the default view shows all Active Contacts.**



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



4. **Enter Contact information. SAVE!**

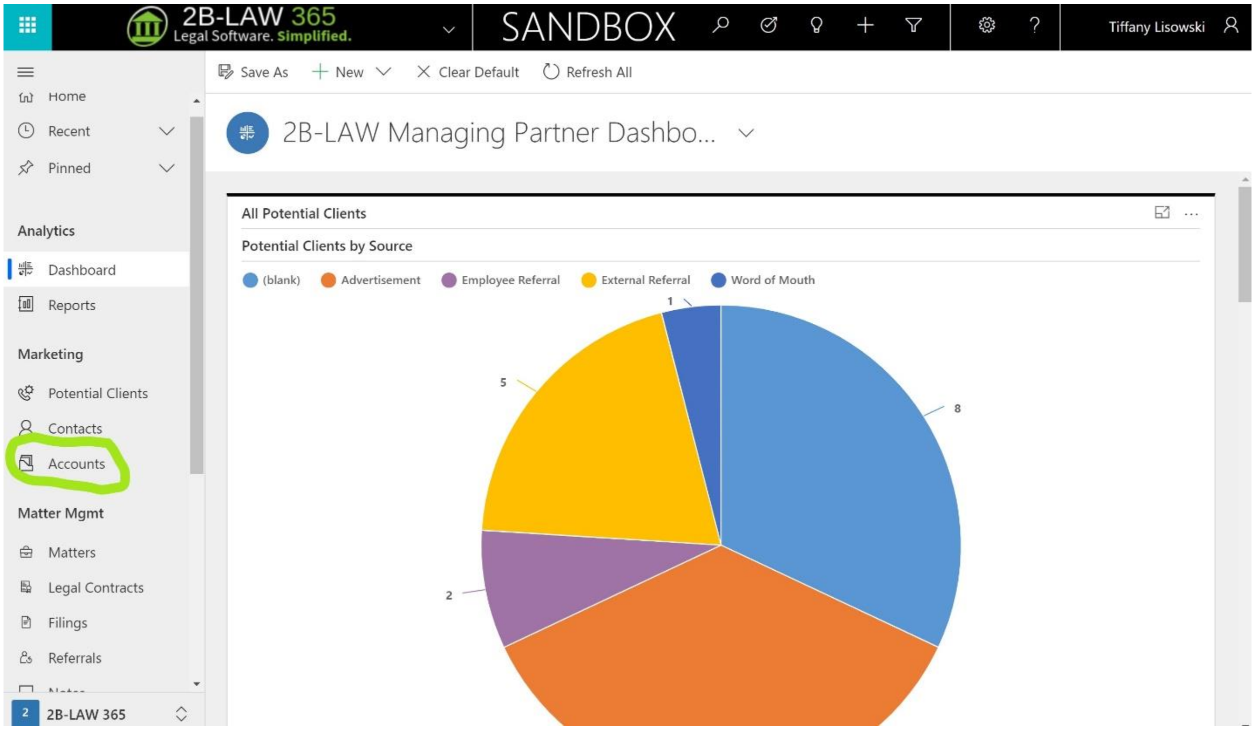

2B-LAW 365
Legal Software. Simplified.
Tiffany Lis
Save
Save & Close
New
Send Email
ClickDimensions Quic...
Run Campaign Autom...
Flow
Home
Recent
Pinned
Analytics
Dashboard
Reports
Marketing
Potential Clients
Contacts
Accounts
Matter Mgmt
Matters
Legal Contracts
Filings
Referrals
CONTACT
New Contact
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.

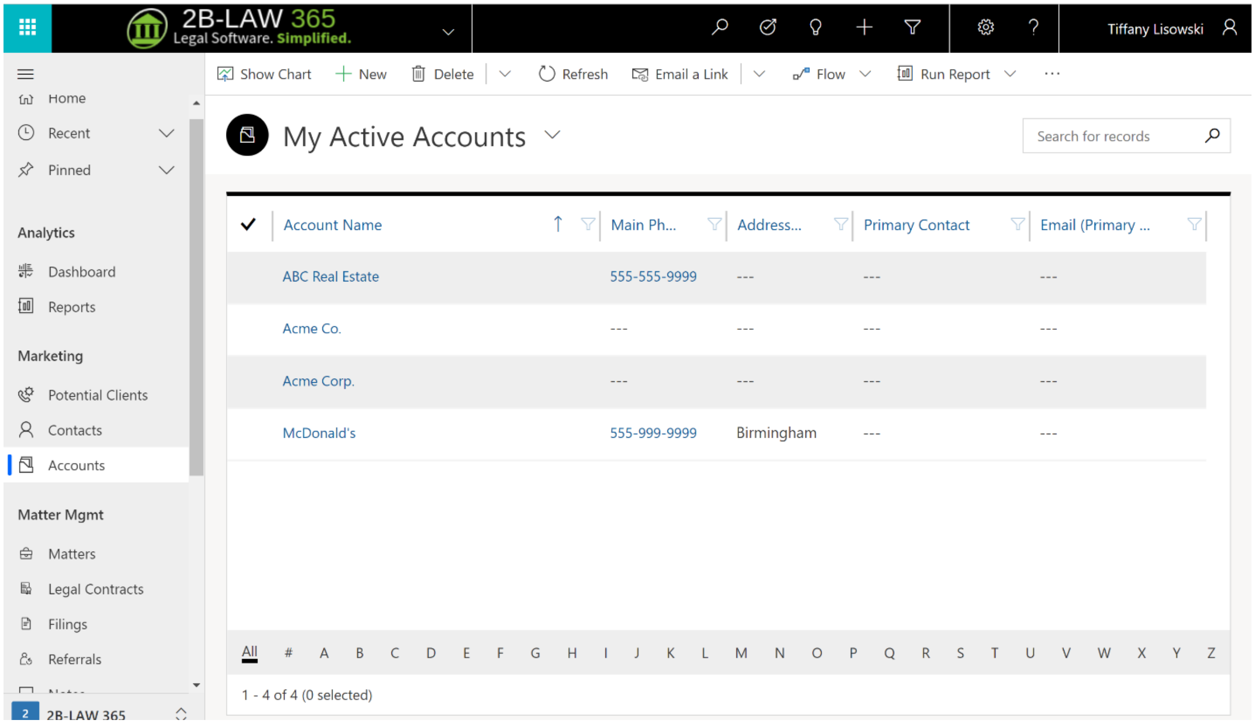
Creating Account Records

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.***

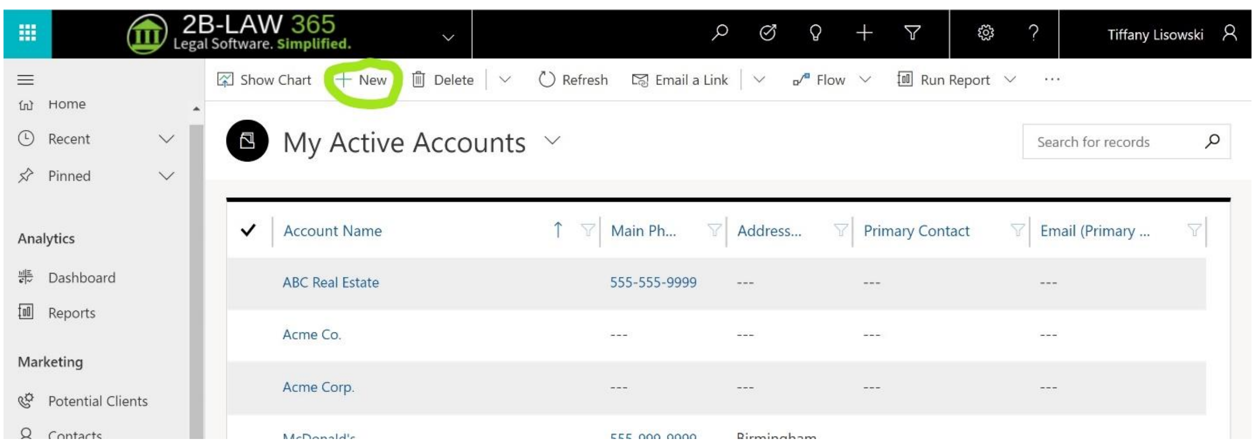
1. **Navigate to 2B-LAW → Marketing → Account**



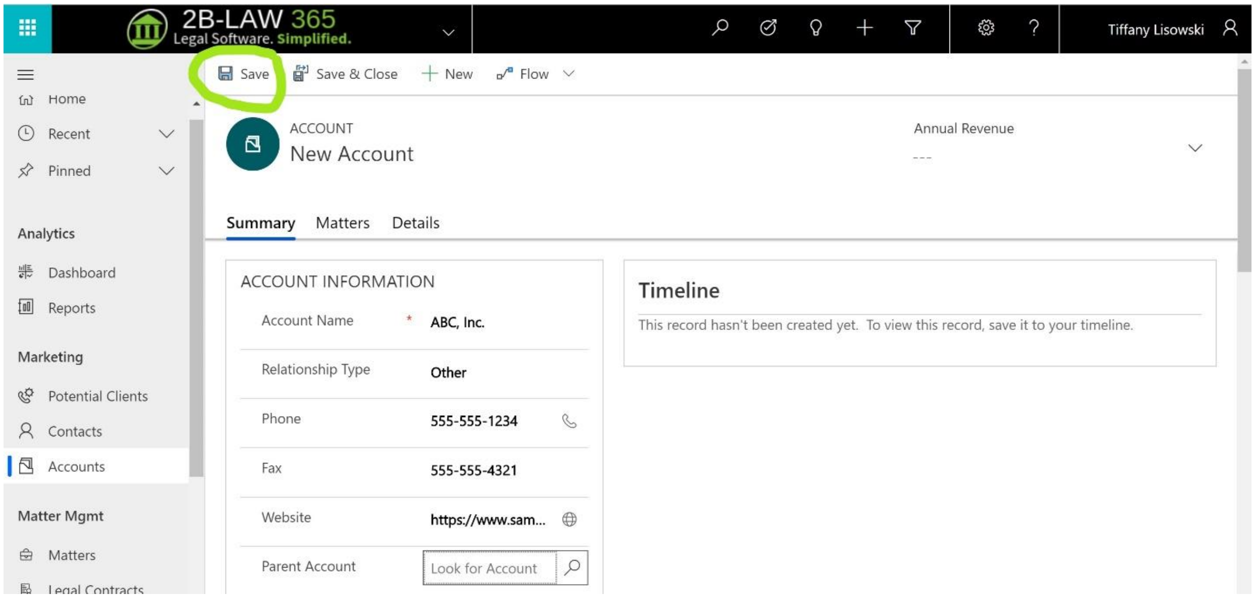
2. **Within Accounts, the default view shows Active Accounts.**



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



4. Enter Account information and SAVE.



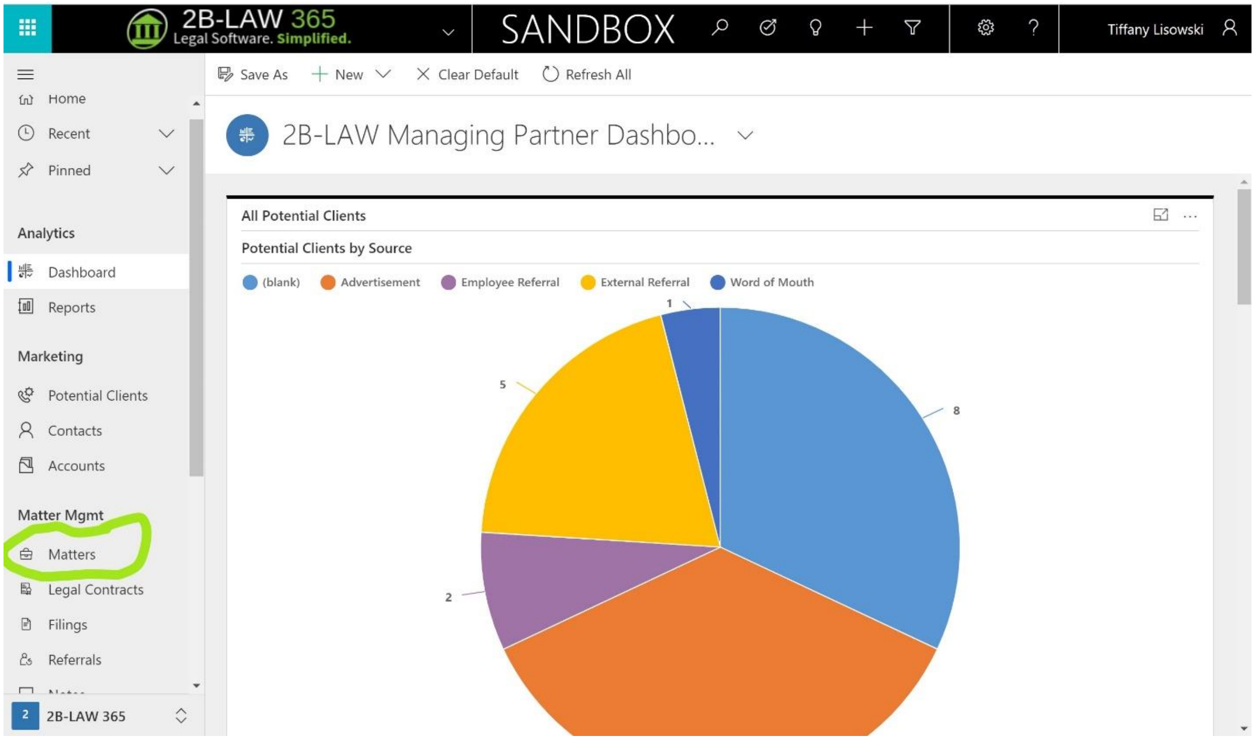
NAVIGATING THE MATTER MGMT SECTION OF 2B-LAW

MATTERS (LEGAL CASES)

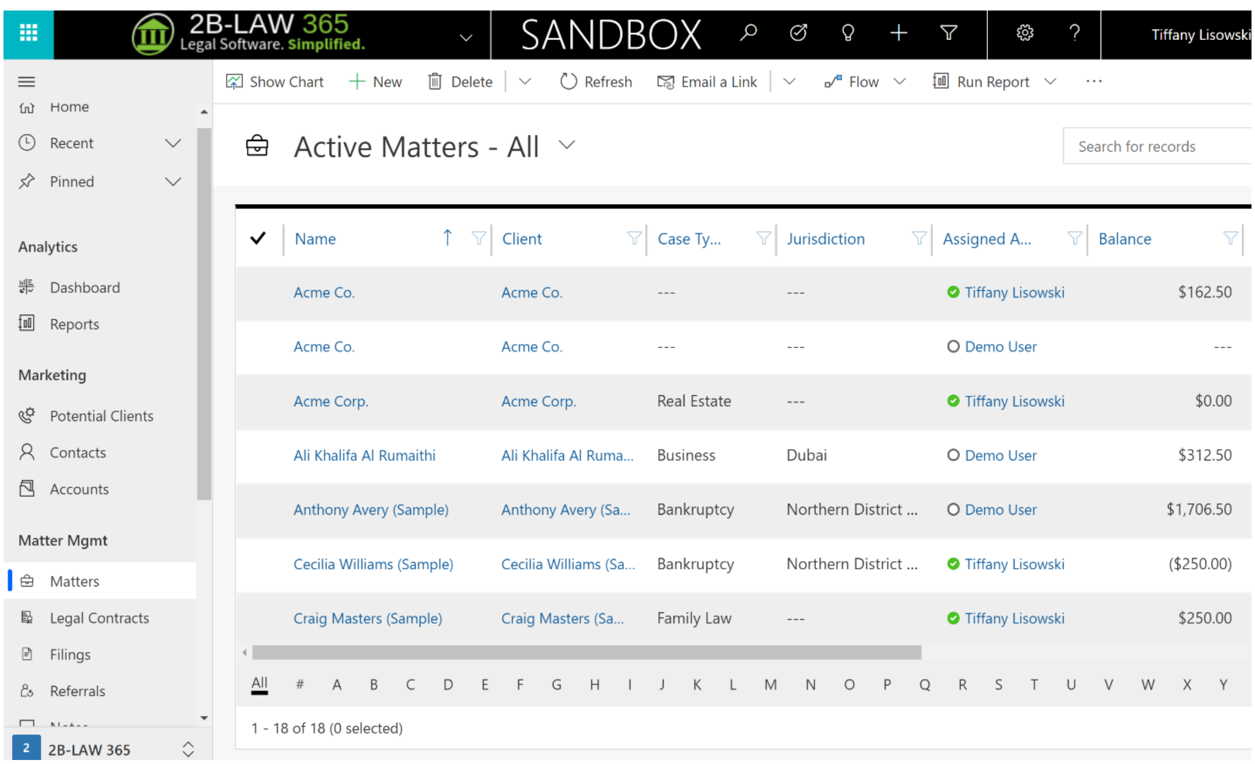
Entering a new Matter record.

To enter information on a new matter or case.

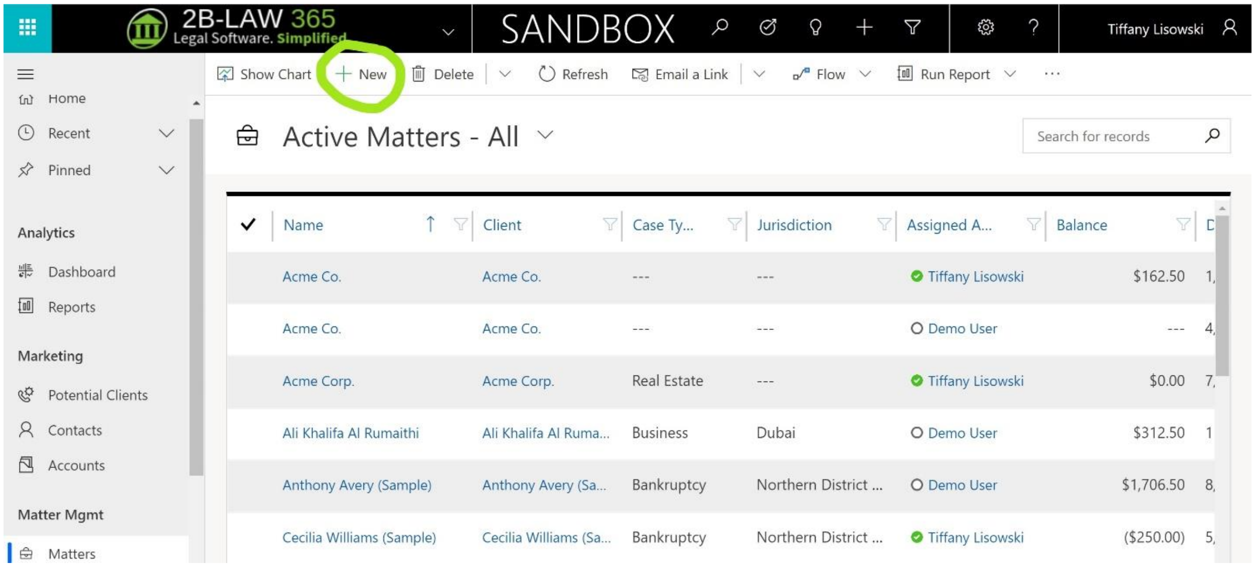
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



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

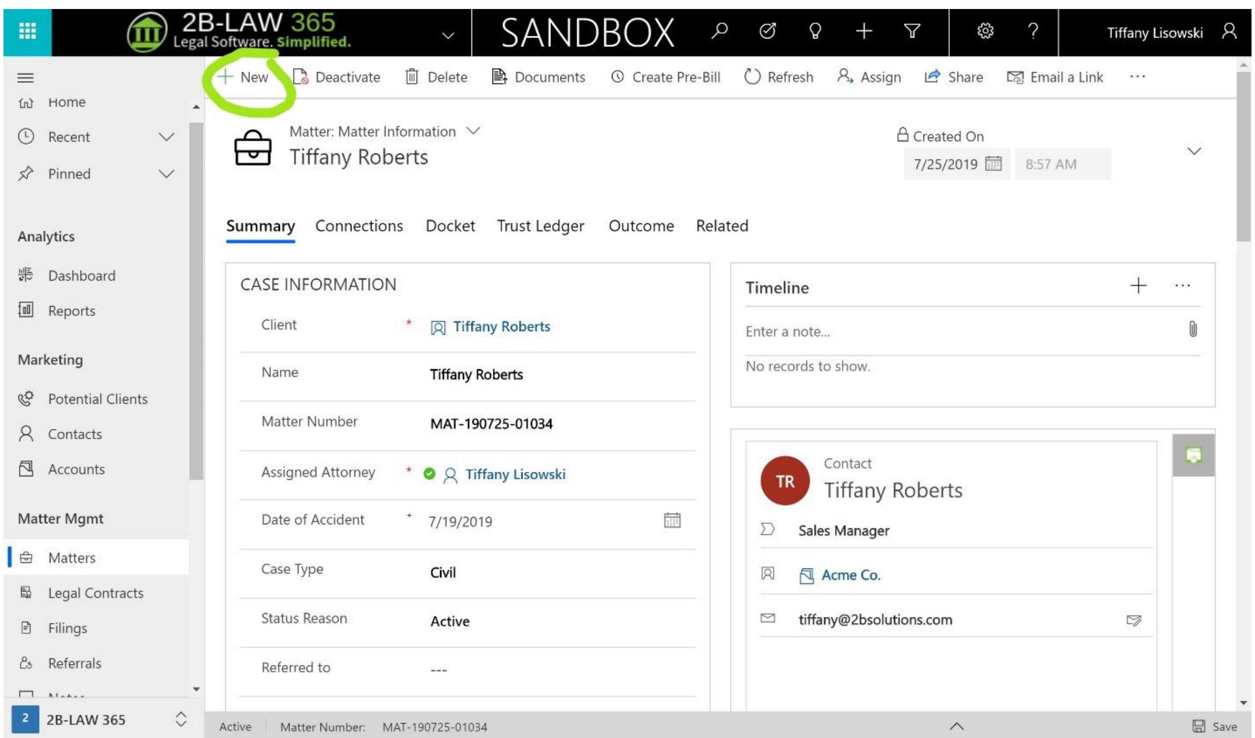


3. To create a new Matter, click +NEW.



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.

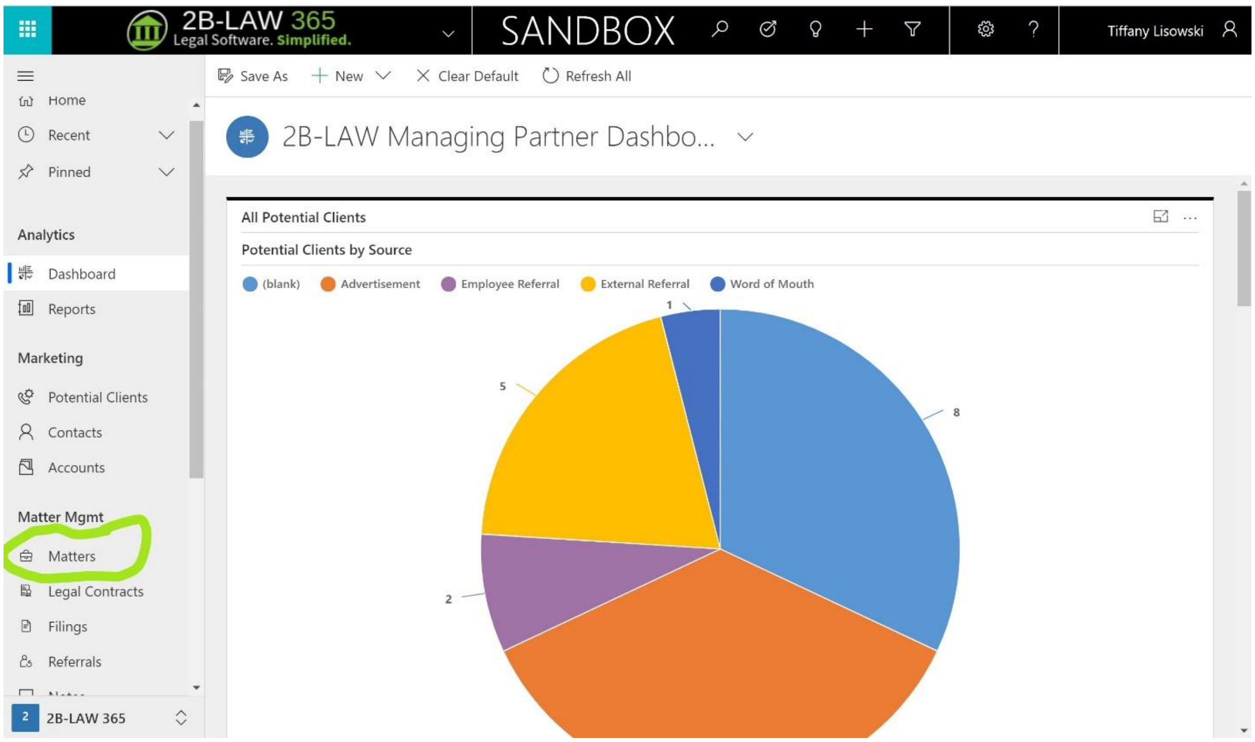


Attaching Documents to a Matter

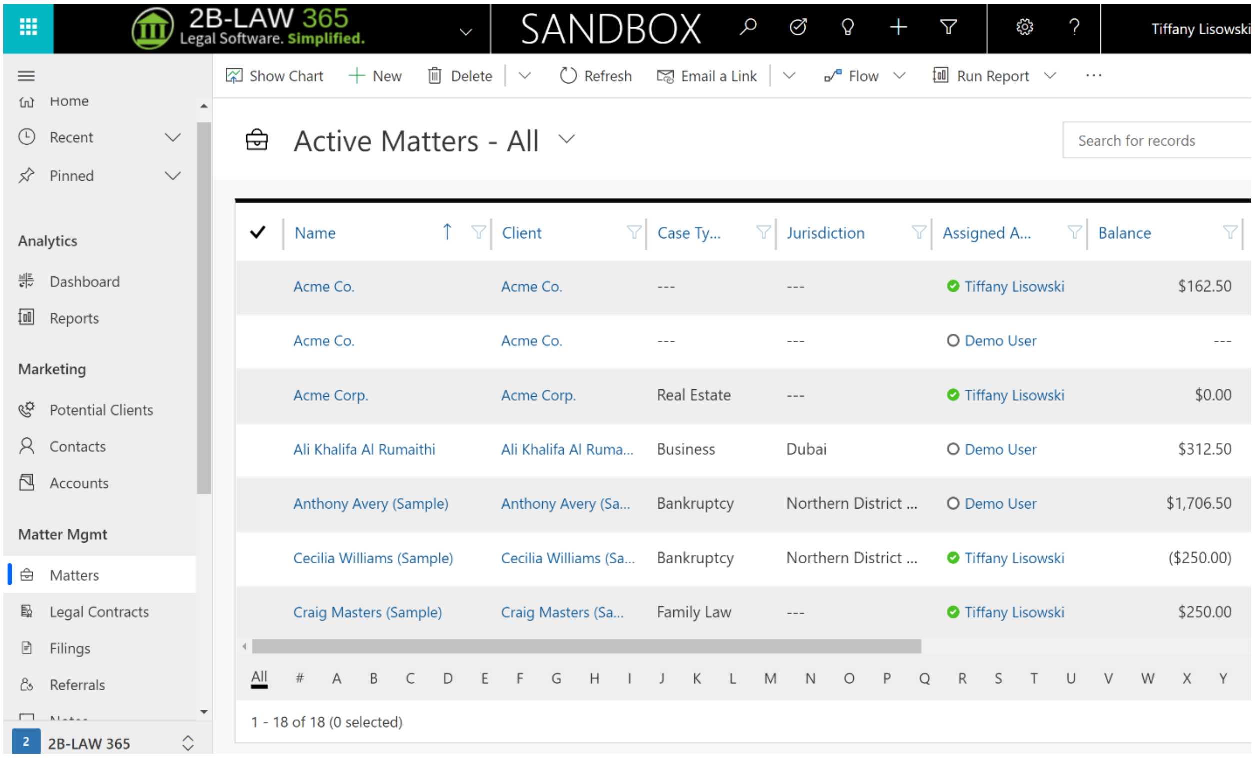
Attaching documents to a Matter is simple. However, it is required that a SharePoint site be integrated with Dynamics 365/2B-LAW and the 2B-LAW 365 custom entities have been enabled for SharePoint. *See* Set Up Dynamics 365 Online to Use SharePoint.

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.

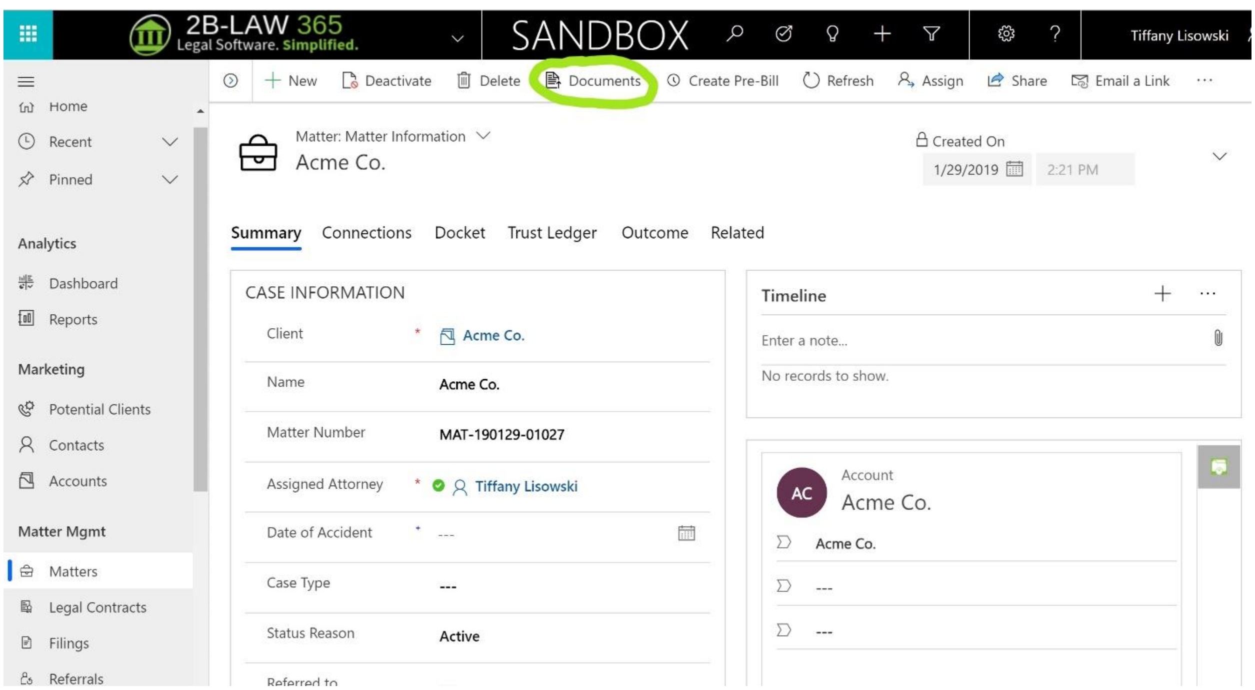
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



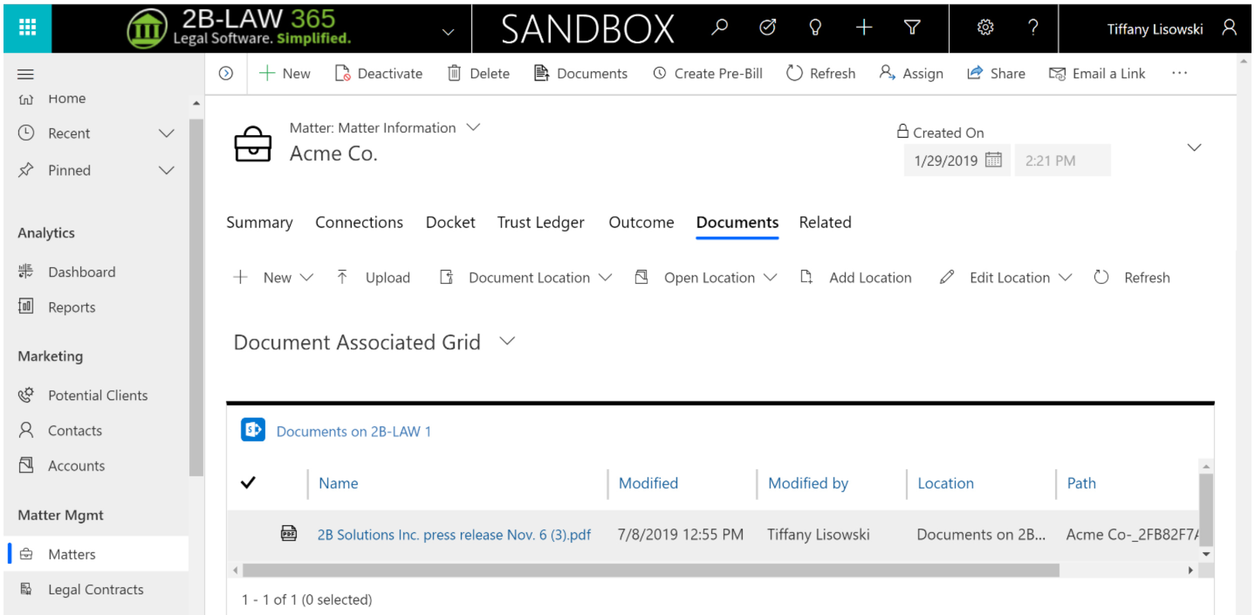
2. **Double-click on the Matter to open Matter record.**



3. **Click Documents.**



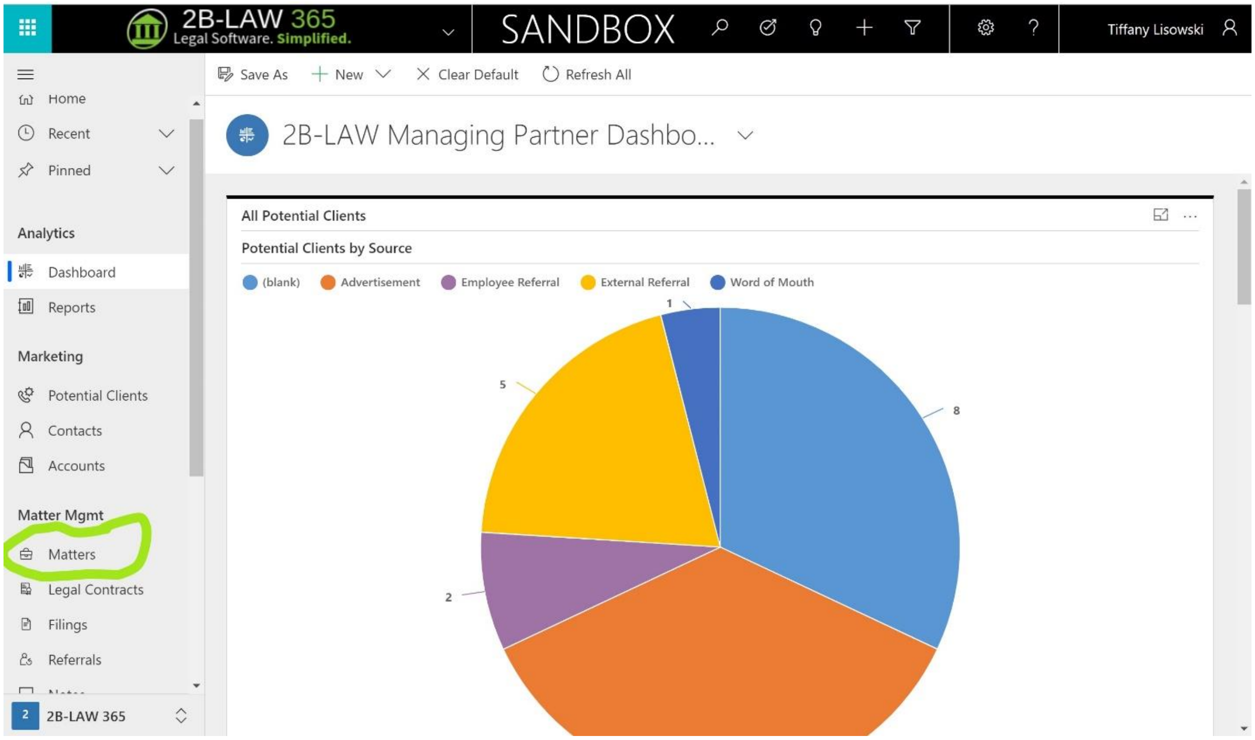
4. **In this screen, all documents stored in SharePoint are visible. New documents can be uploaded, folders created, etc. For more information, see SharePoint.**



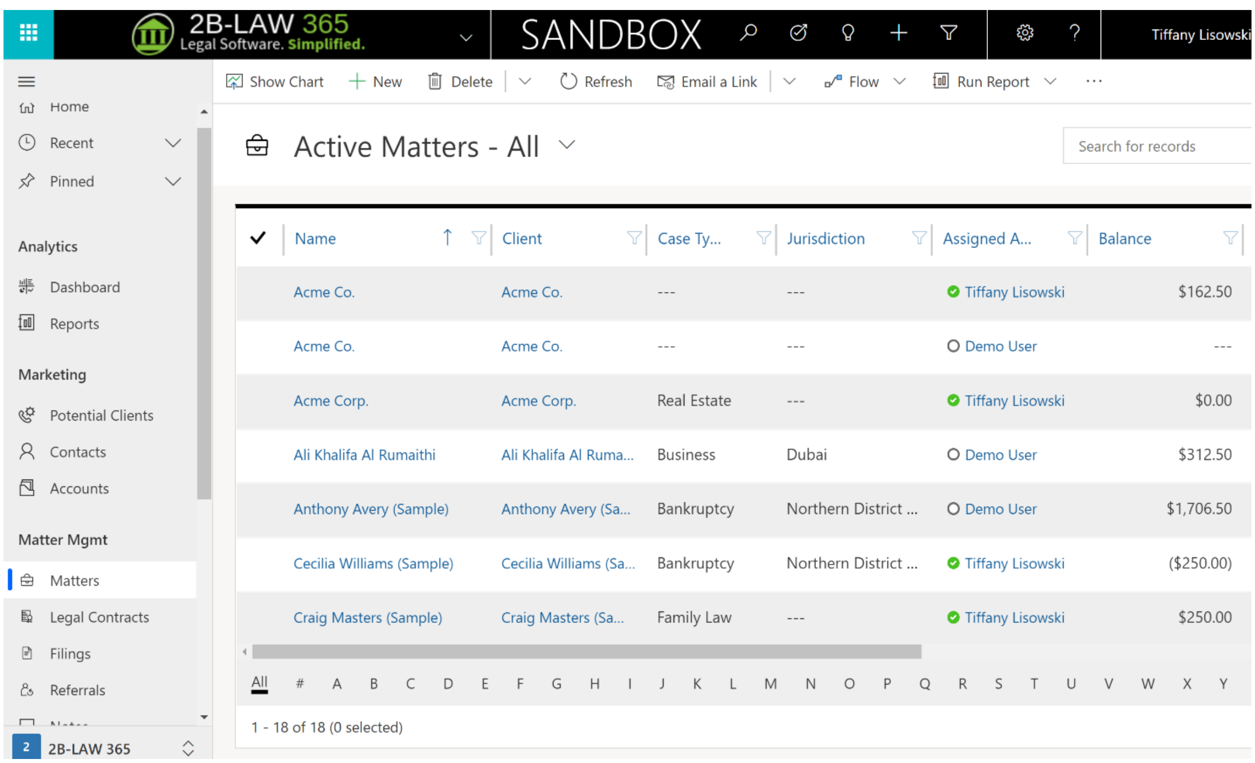
Utilizing the Docket Section of the Matter Record

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”.

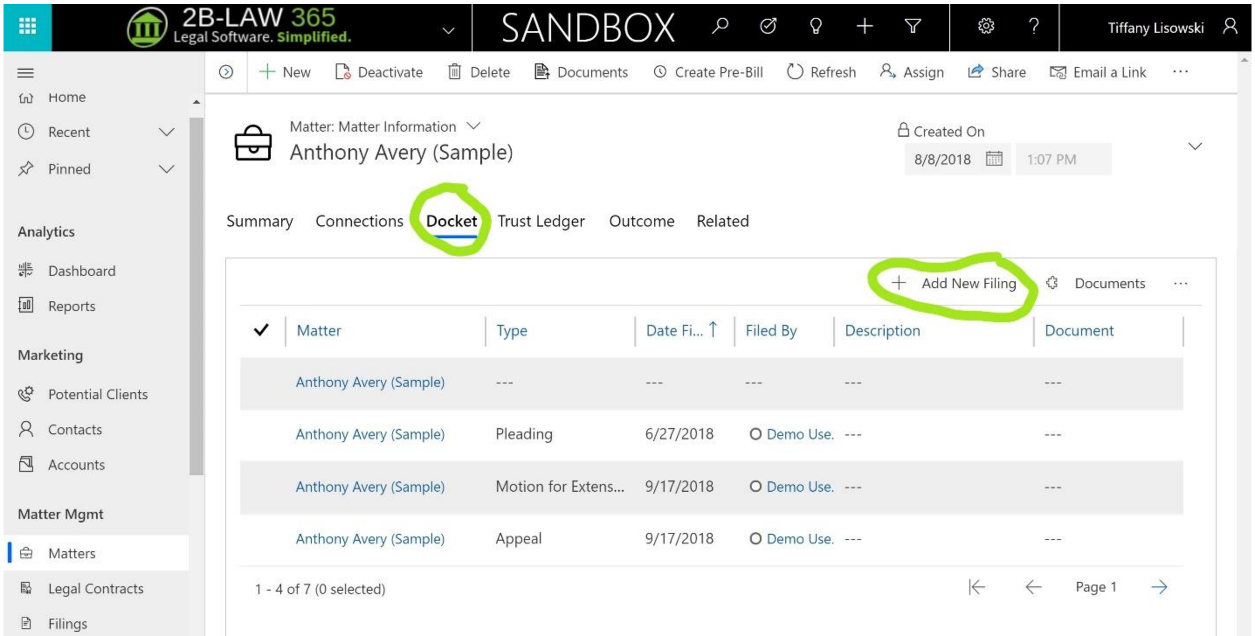
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



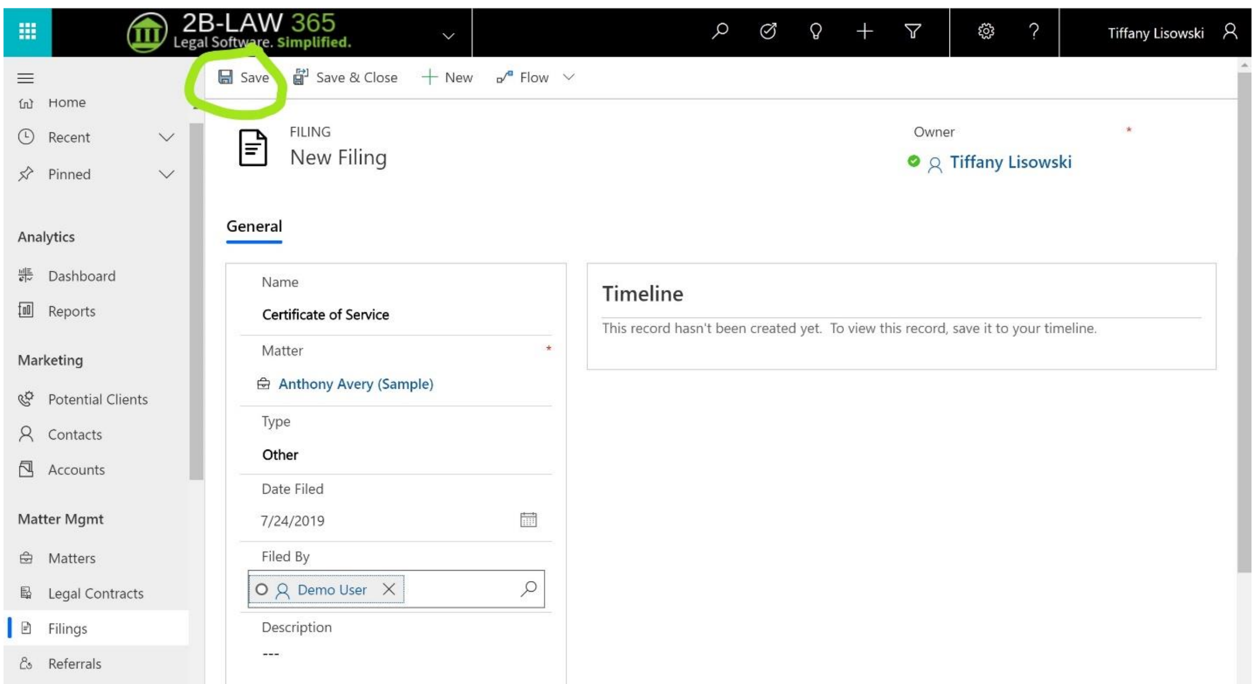
2. **Double-click on the Matter to open Matter record.**



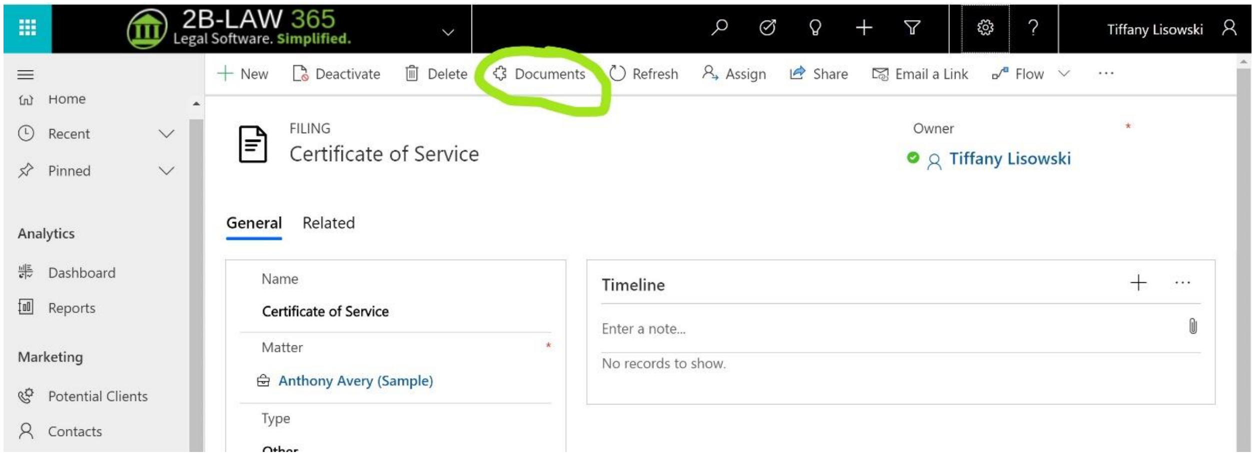
3. **Click on the Docket tab with the Matter record. This section shows a list of documents filed in a case. To enter a new document record, click + Add New Filing.**



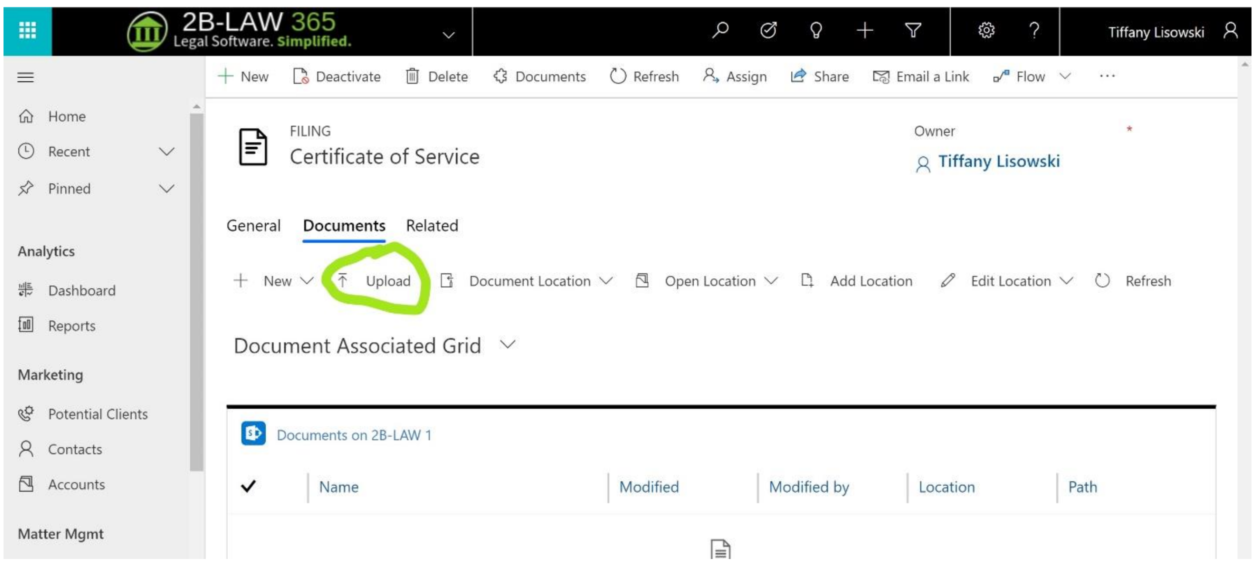
4. Enter document information and SAVE.



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



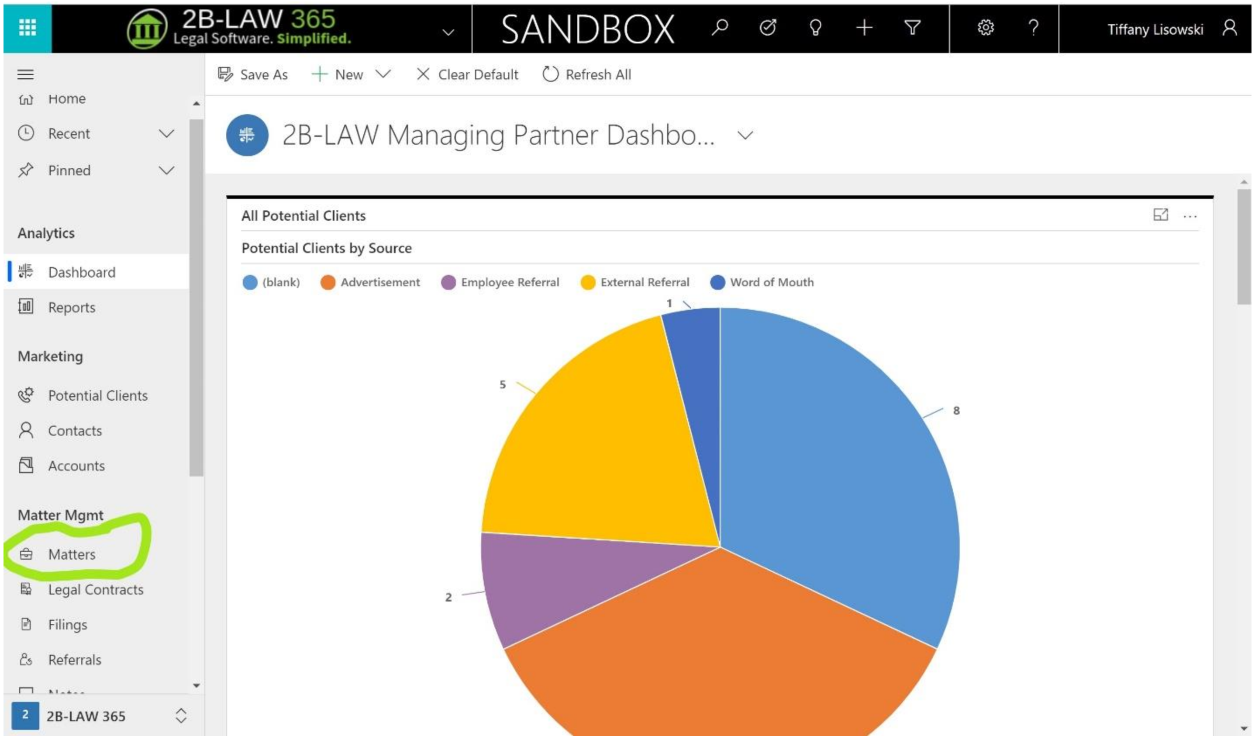
6. **Next, click "Upload" and select the appropriate documents.**



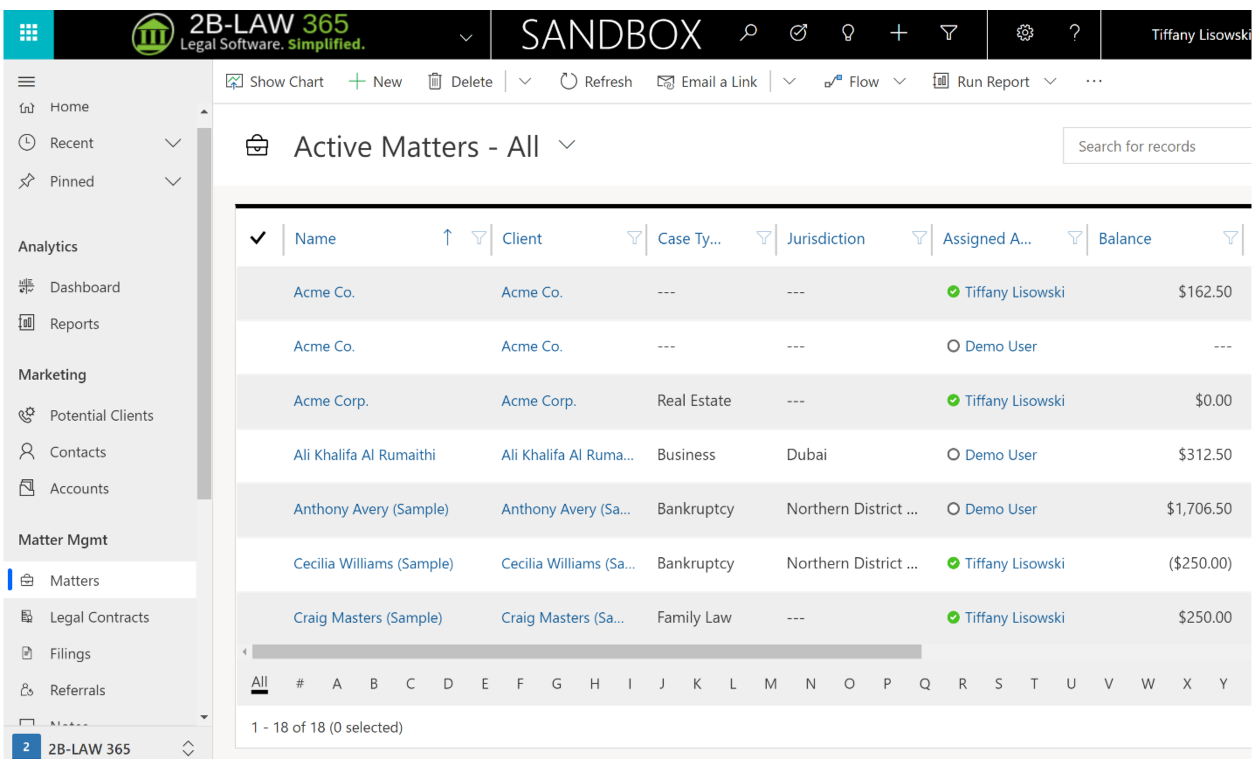
Quick Create: Time

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

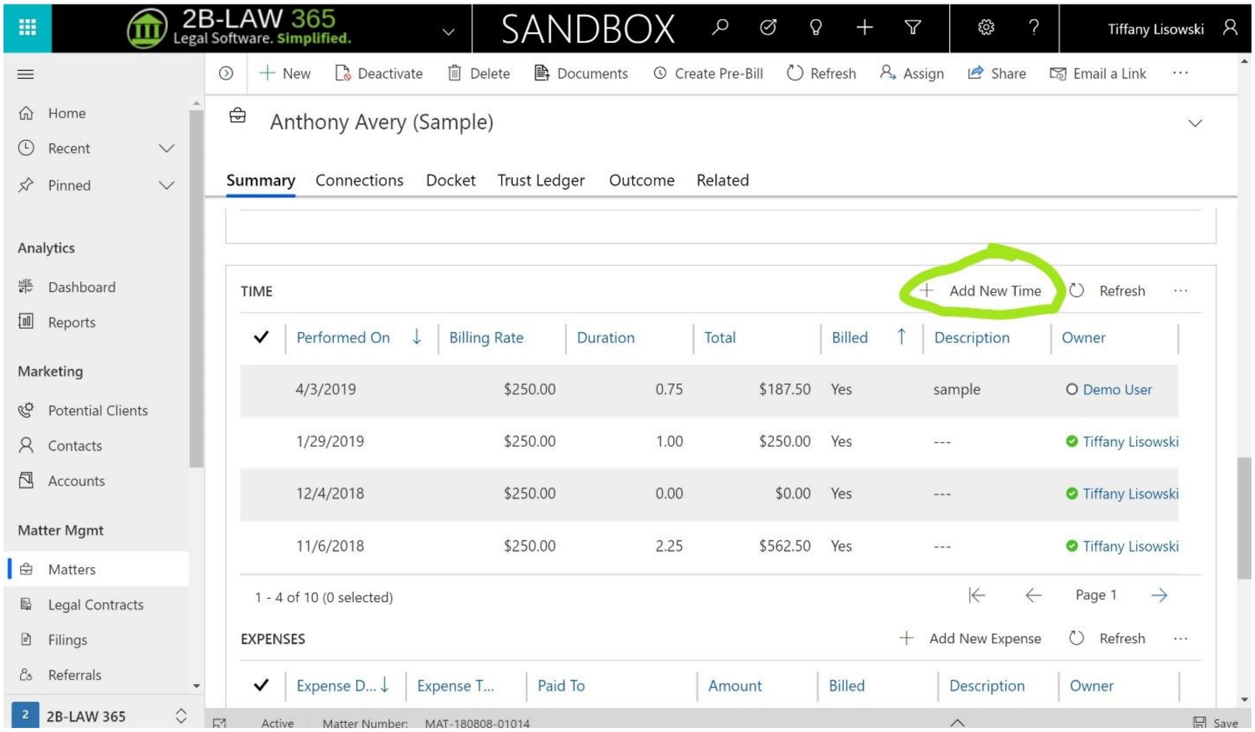
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



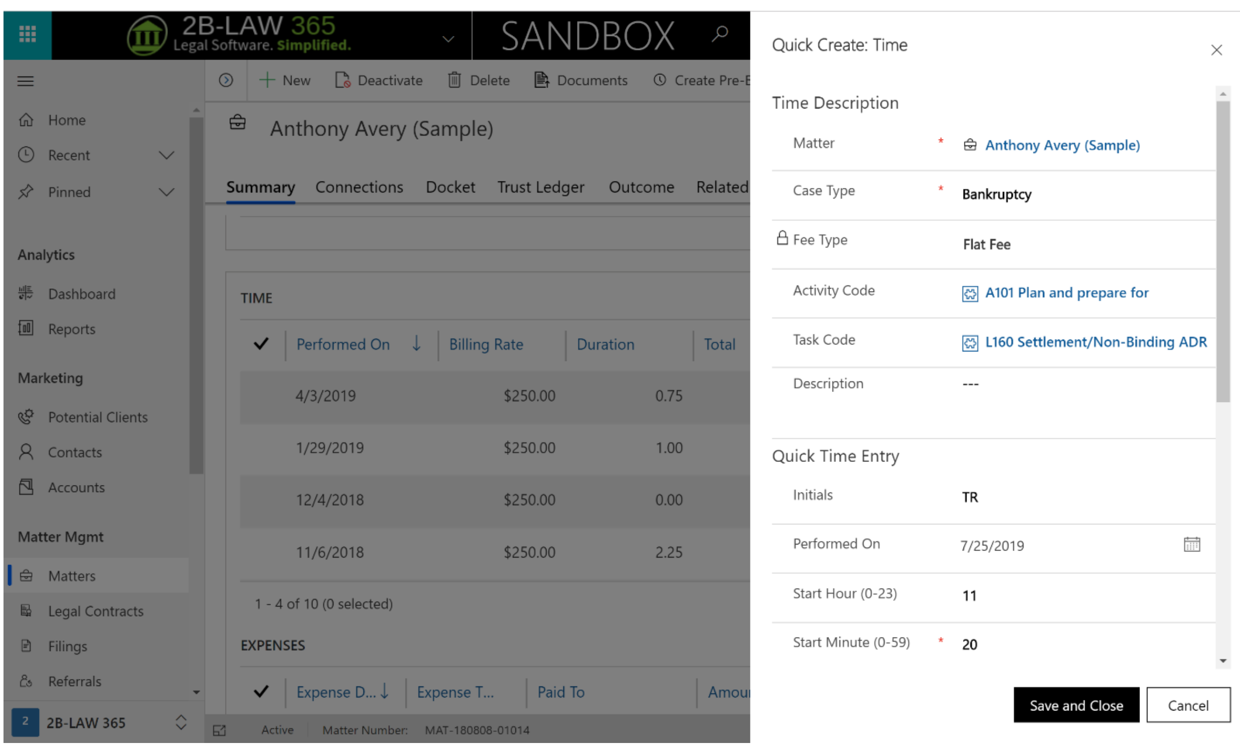
2. **Double-click on the Matter to open Matter record.**



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



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.**

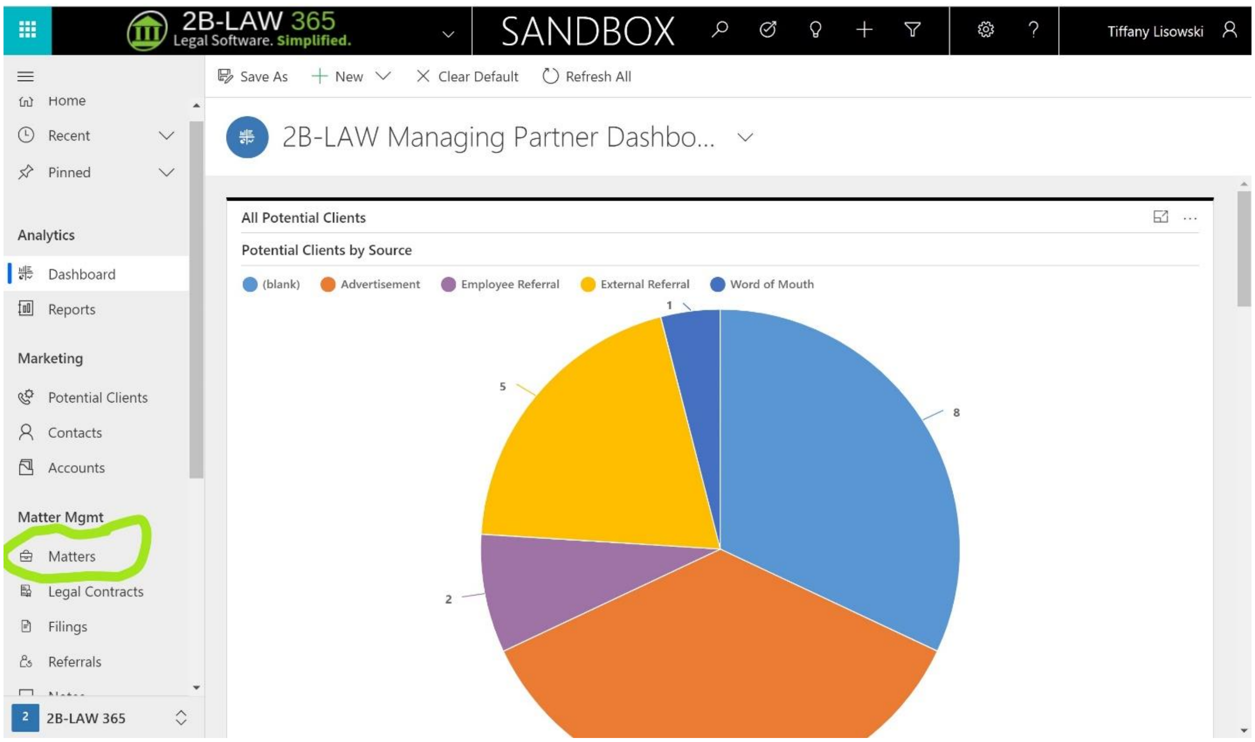


5. **Note that the Activity Code and Task Code fields are lookups. Those fields point to the predefined codes provided by the American Bar Association. Also note that time can be entered using the 24 hour clock format. Don't forget to save!**

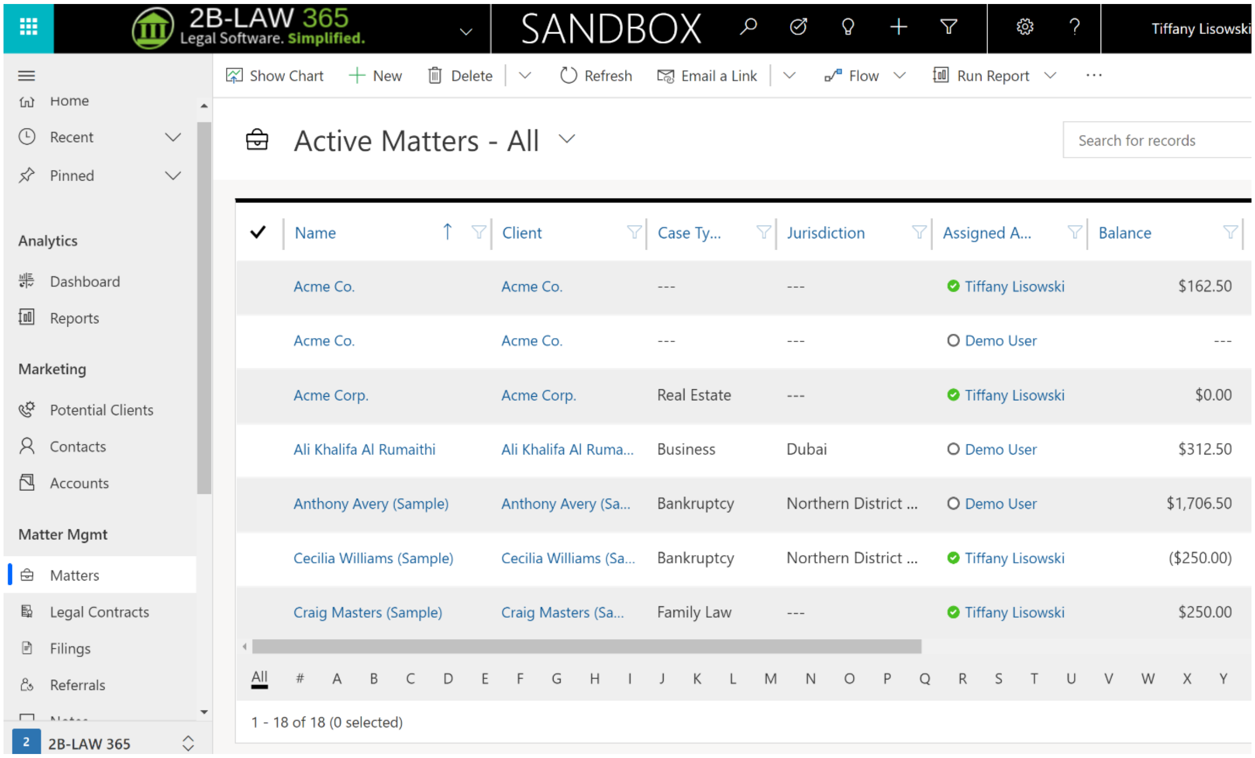
Quick Create: Expense

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

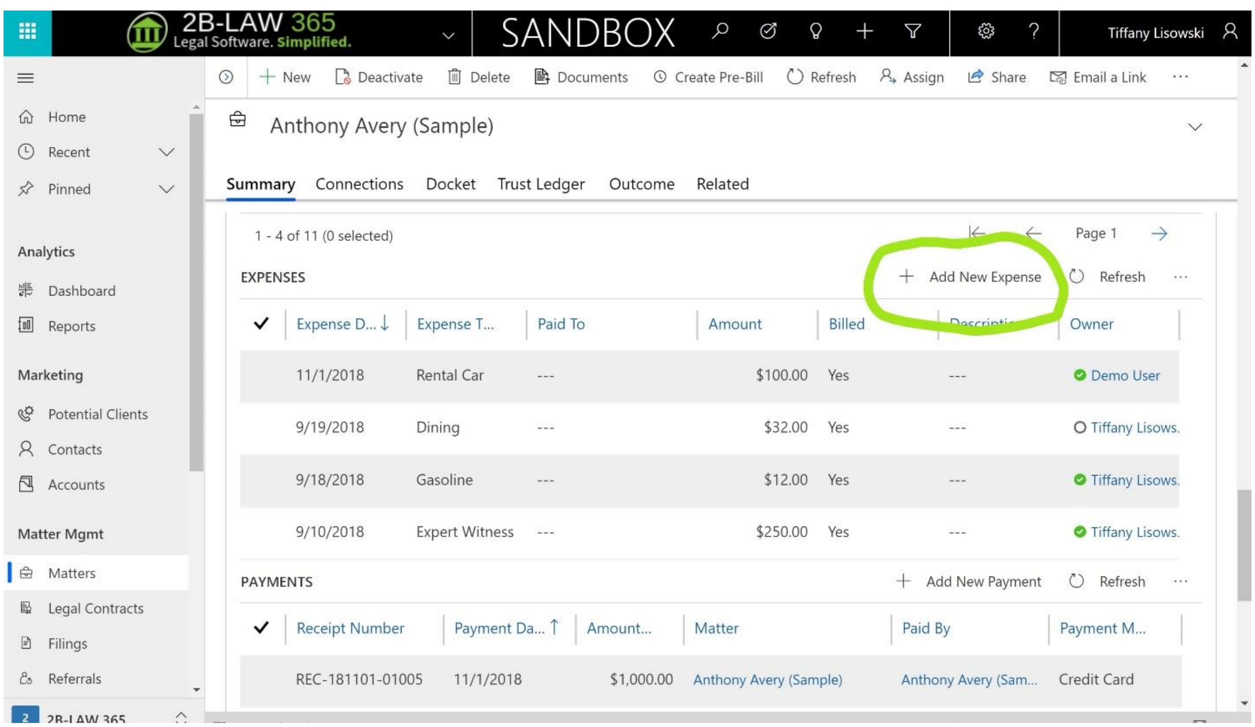
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



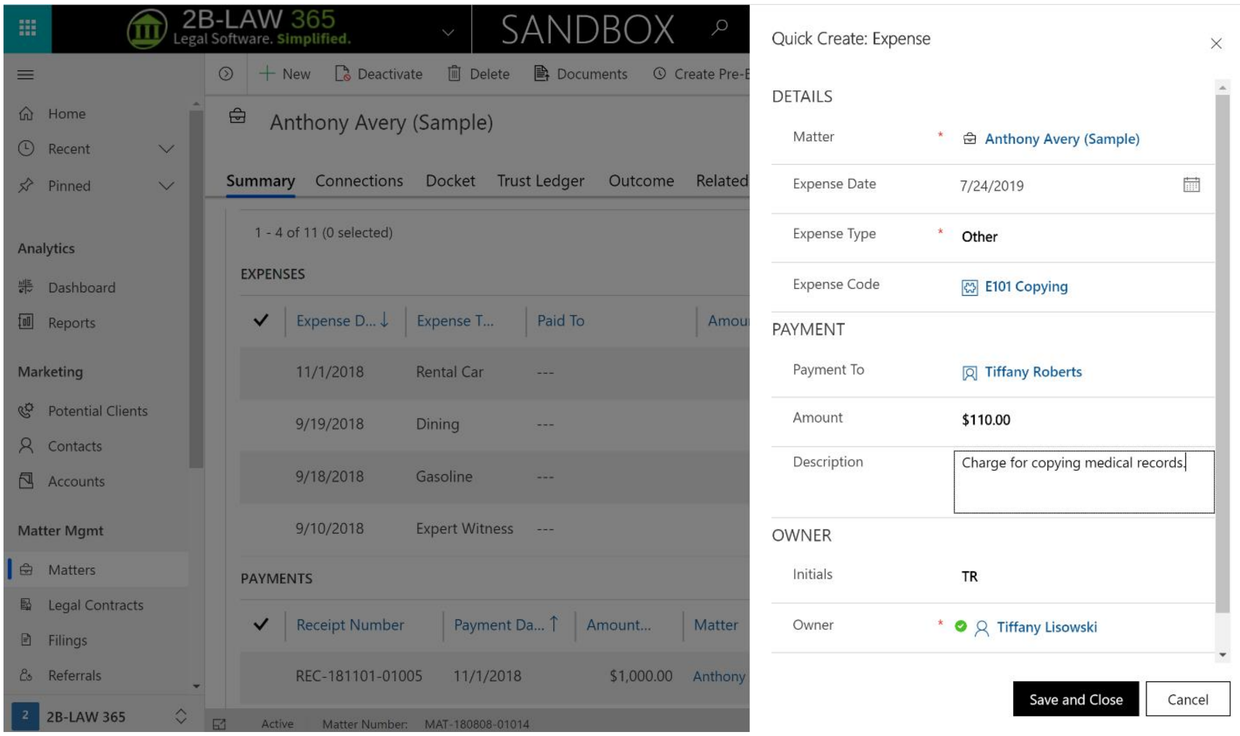
2. **Double-click on the Matter to open Matter record.**



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



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.**

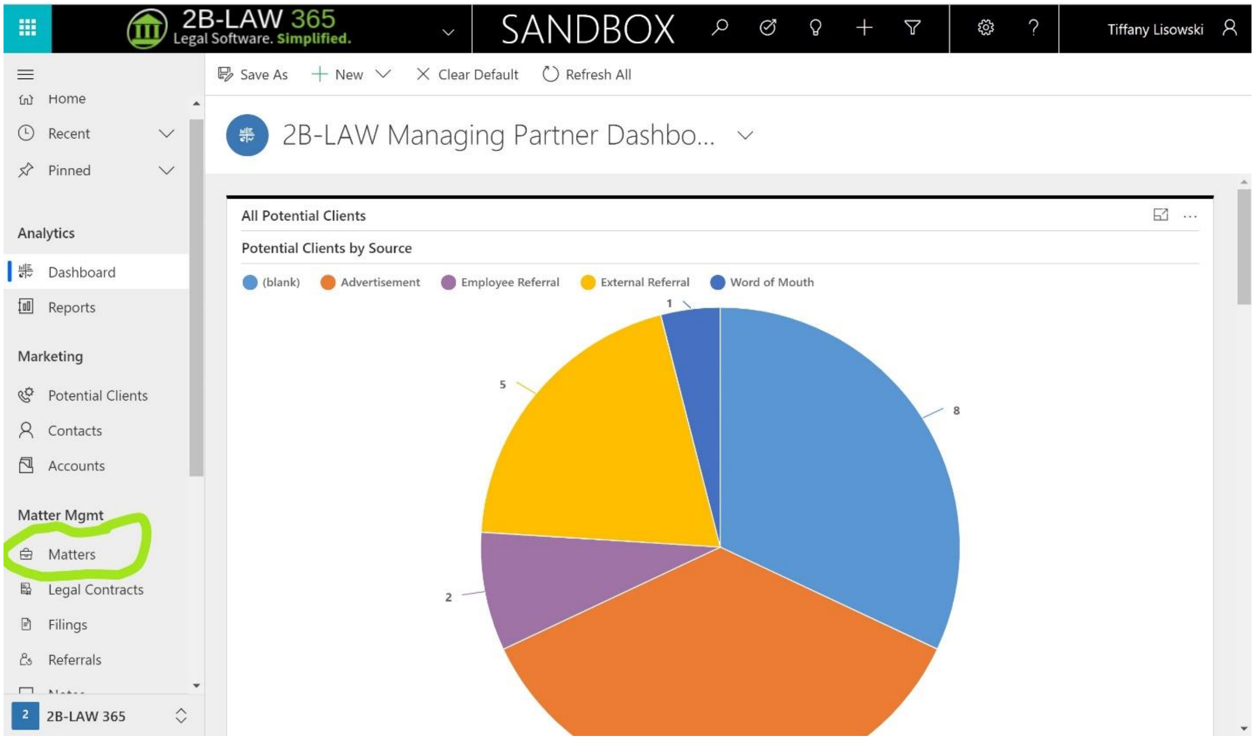


5. **Note that Expense Code field is a lookup that points to the predefined codes provided by the American Bar Association. Don't forget to save!**

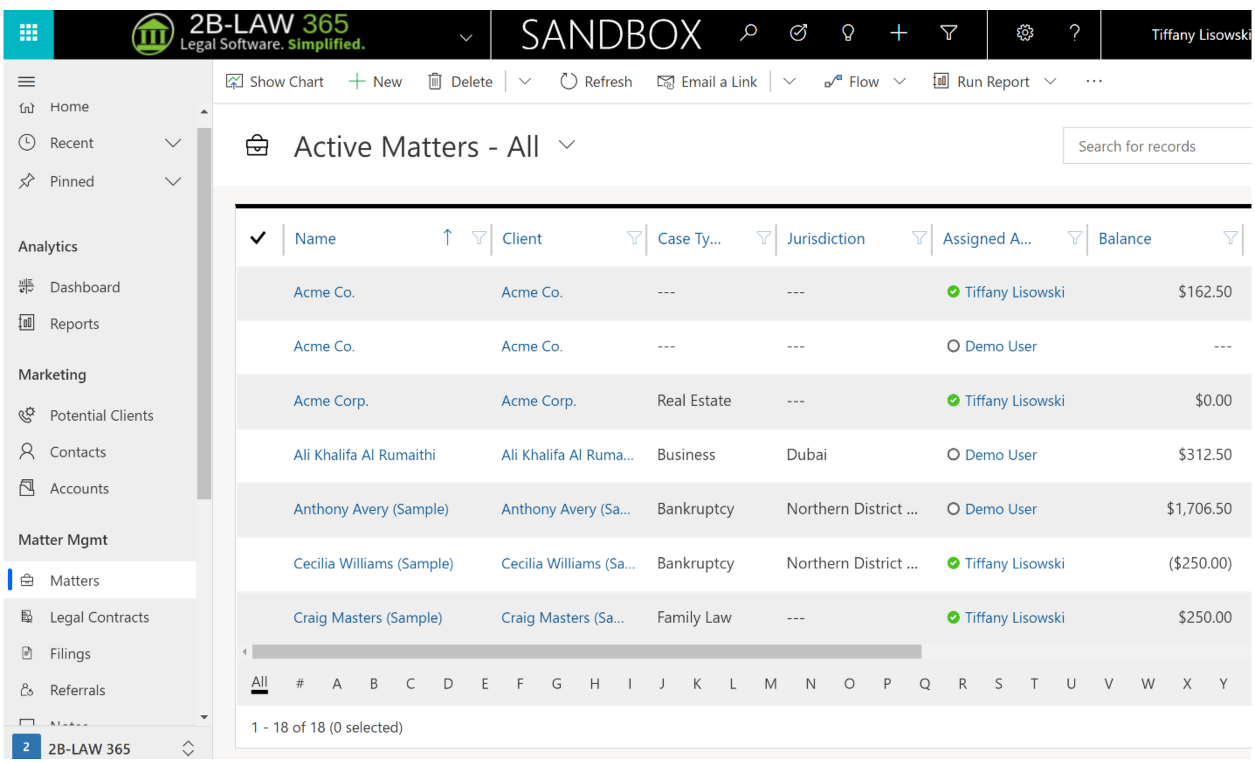
Quick Create: Payment

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

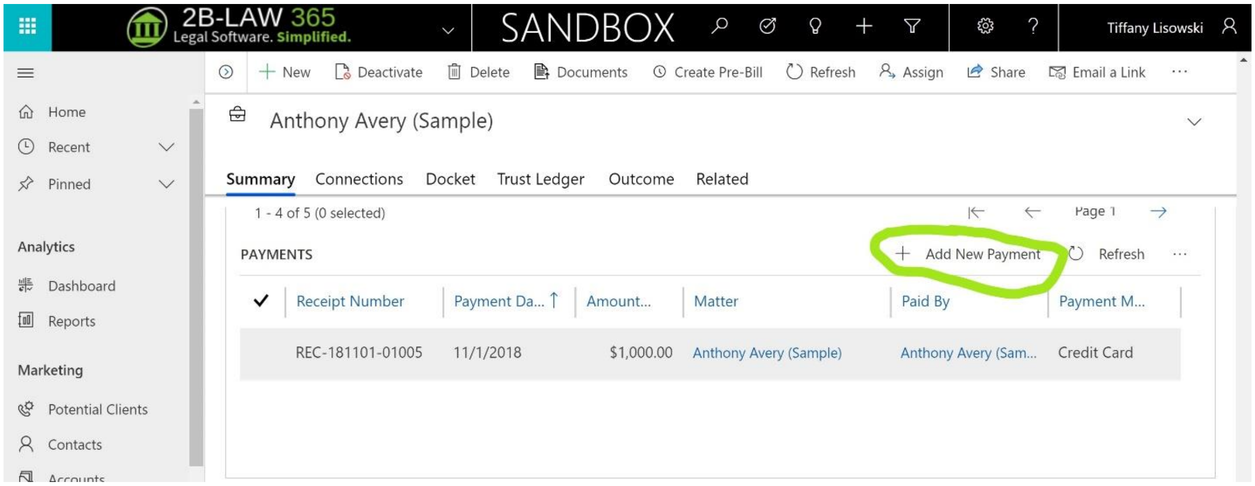
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters.**



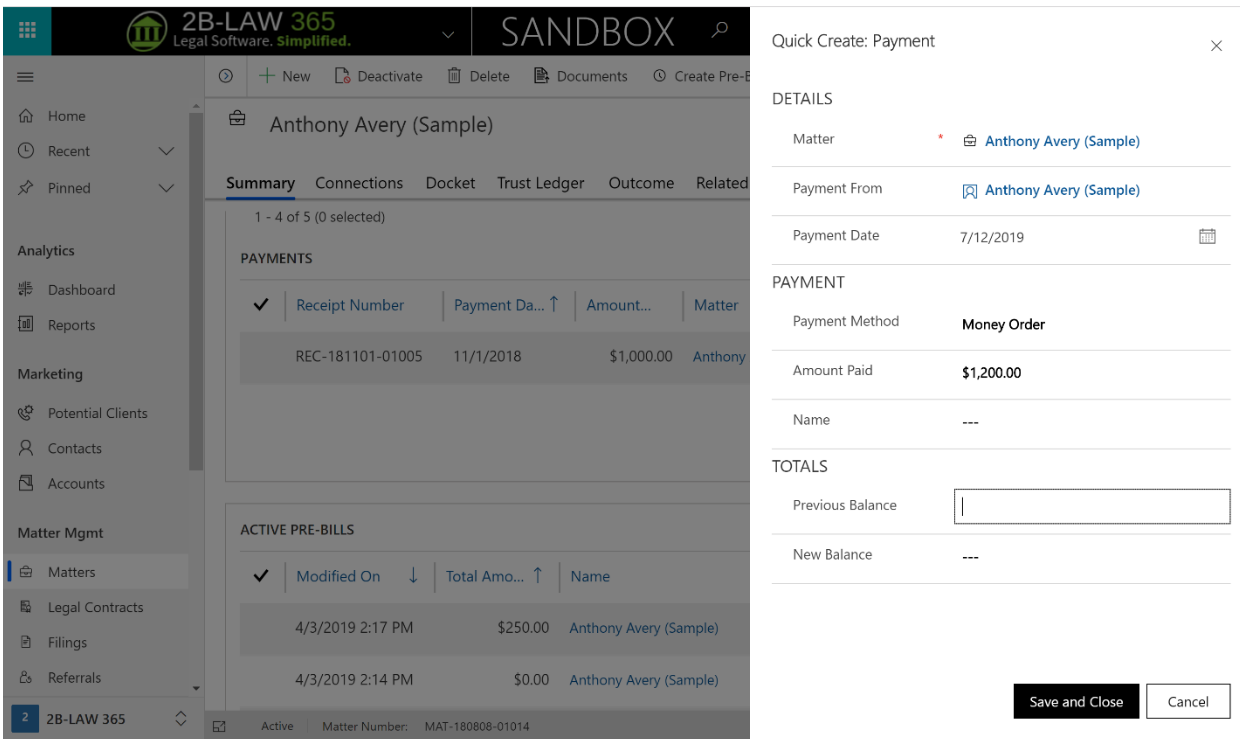
2. **Double-click on the Matter to open Matter record.**



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



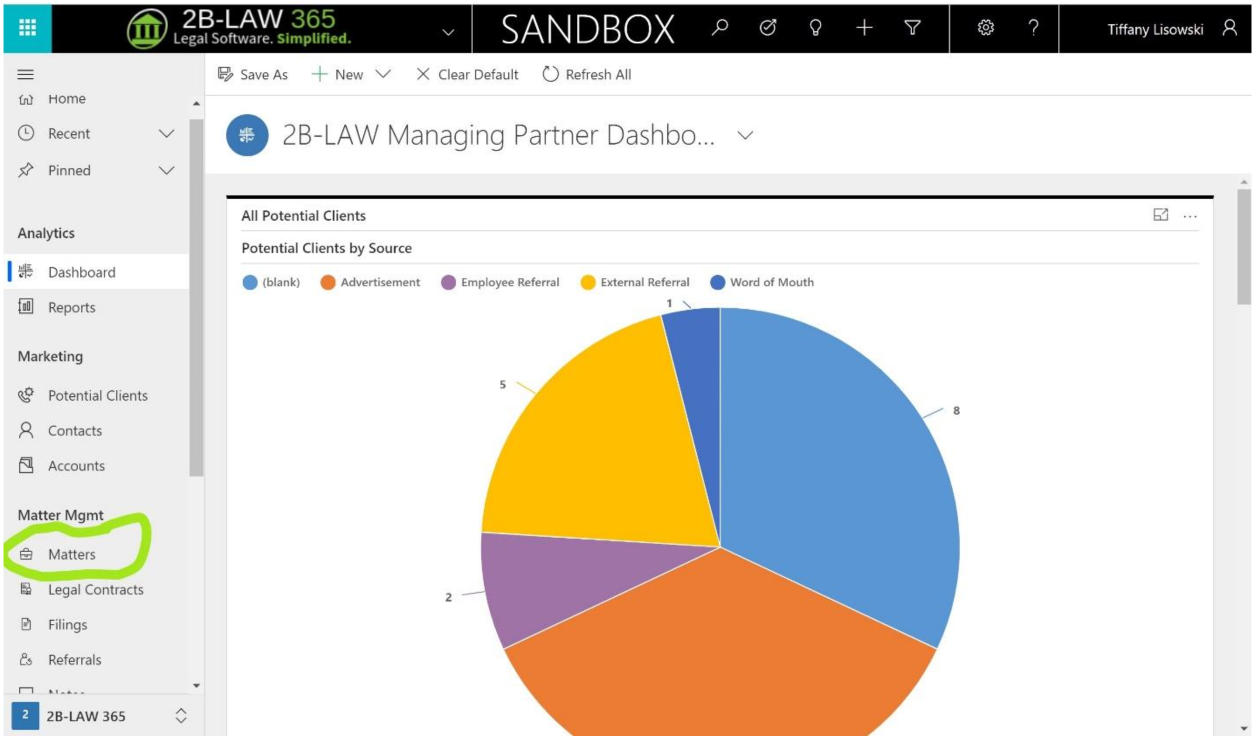
4. **Enter payment information and SAVE. Note: A Receipt Number will be generated automatically.**



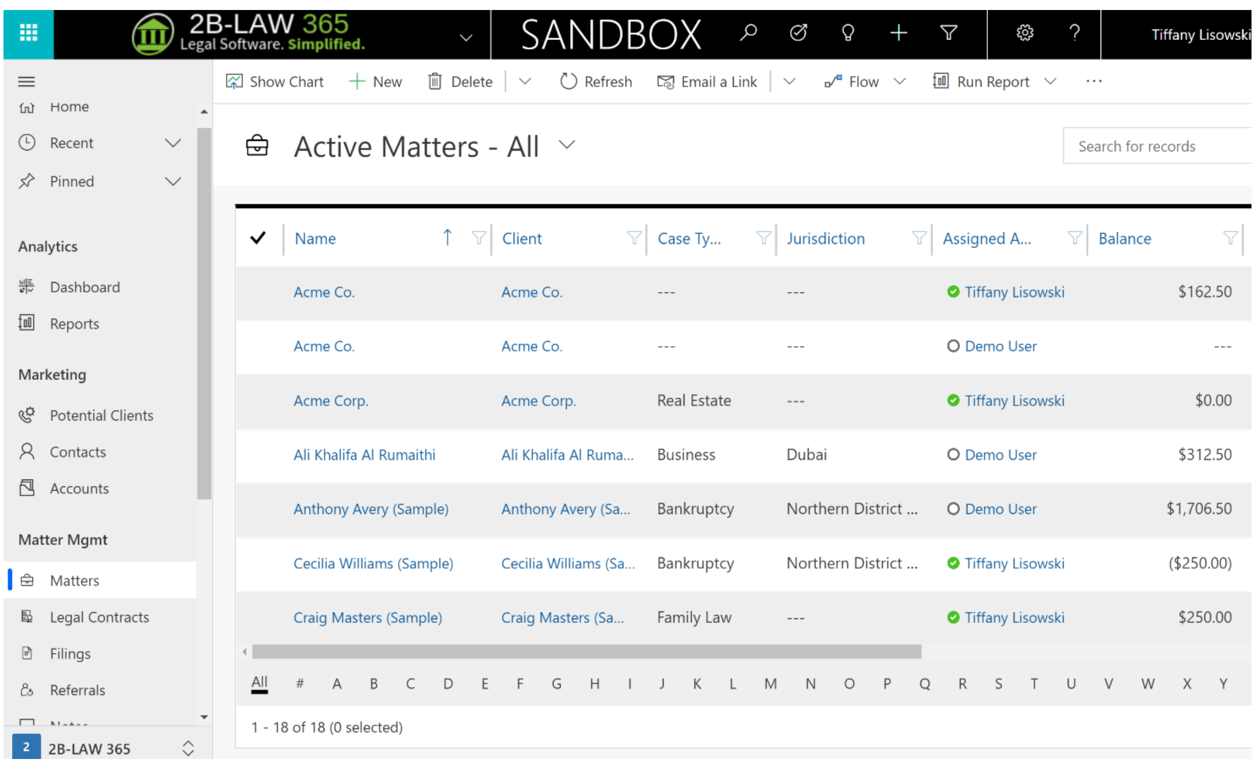
Trust Ledger

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

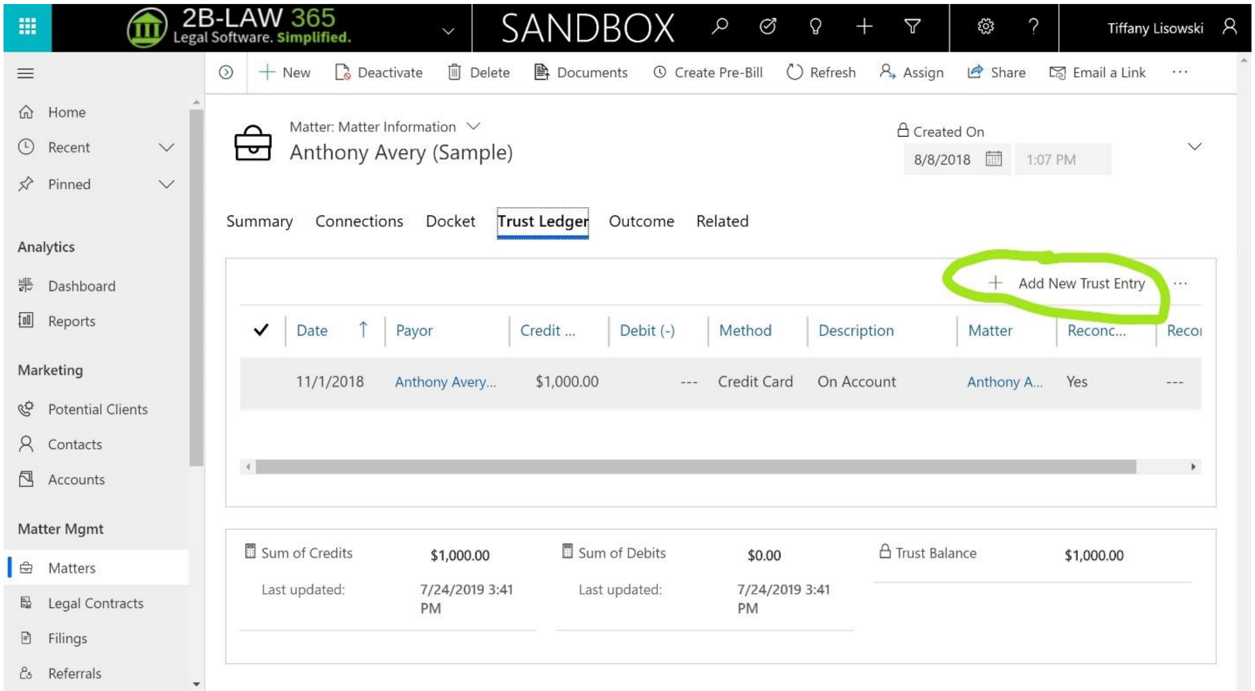
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters.**



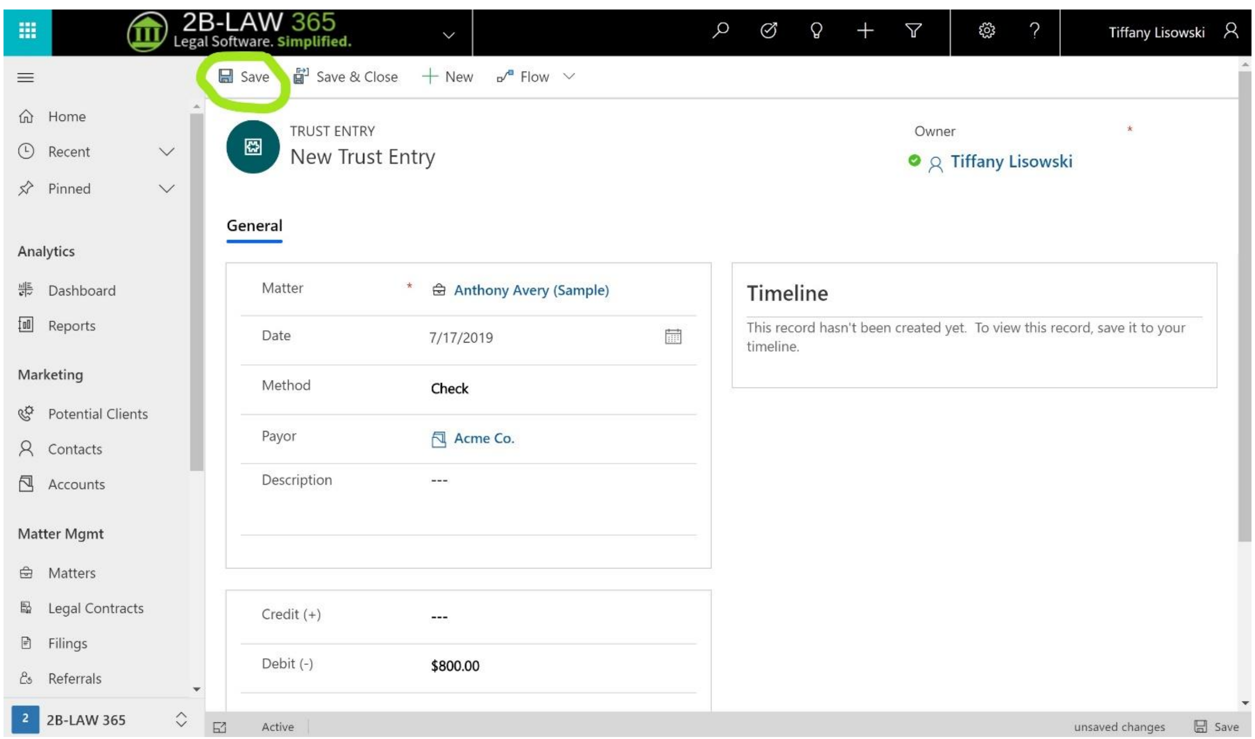
2. **Double-click on the Matter to open Matter record.**



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



4. **Enter information in Trust Ledger form and SAVE!**

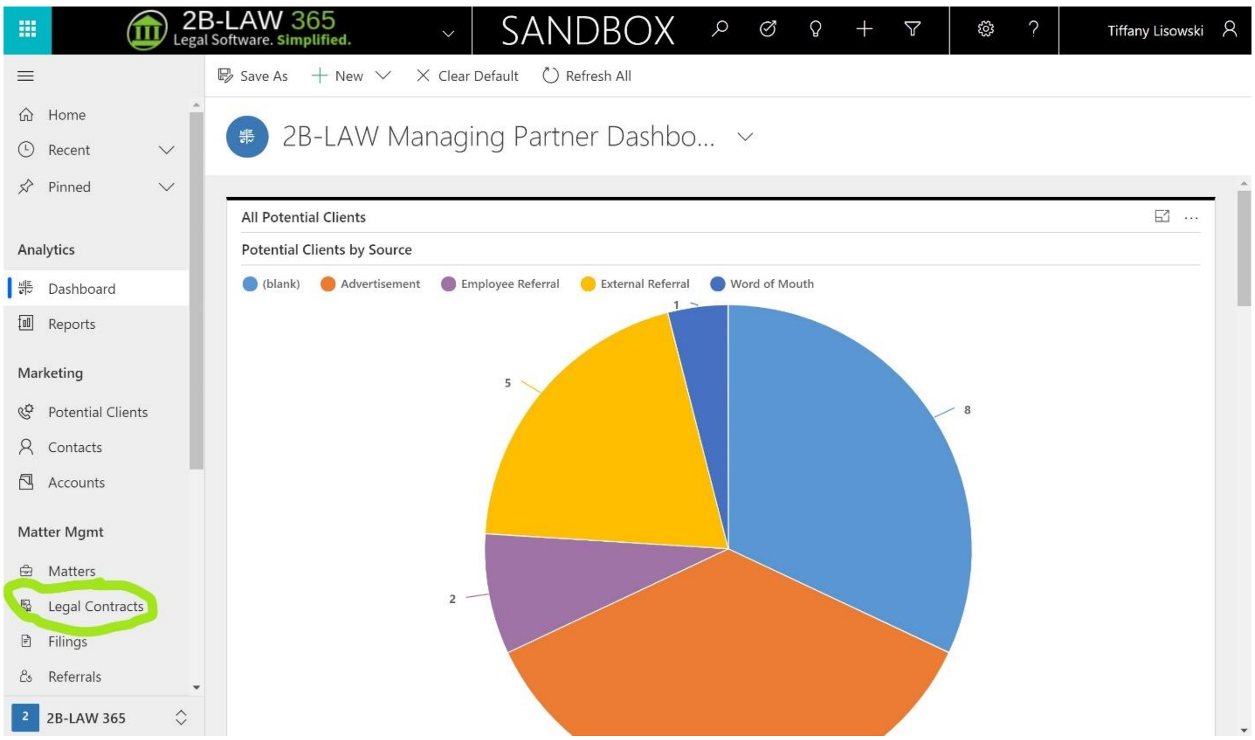


5. **Note: Trust Ledger totals update once per hour.**

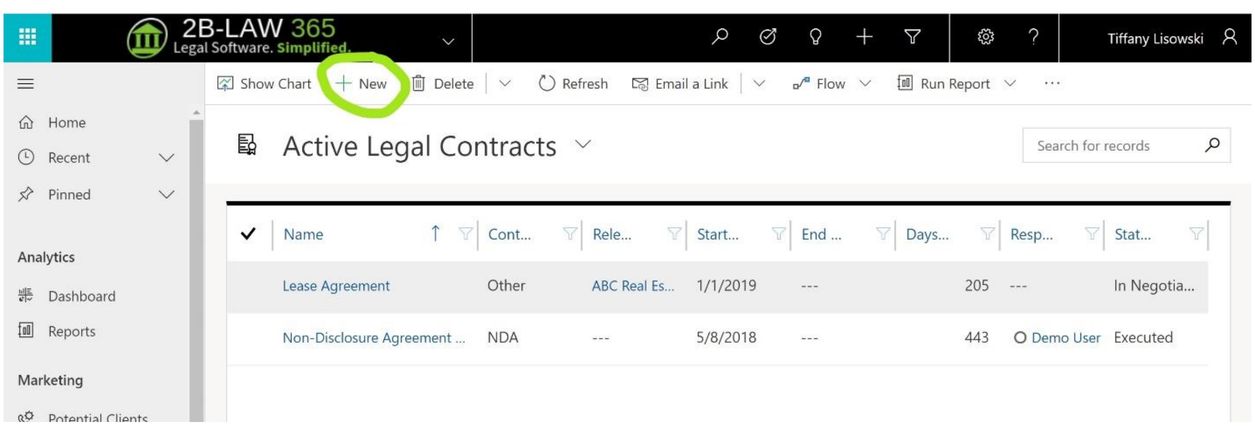
LEGAL CONTRACTS

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.

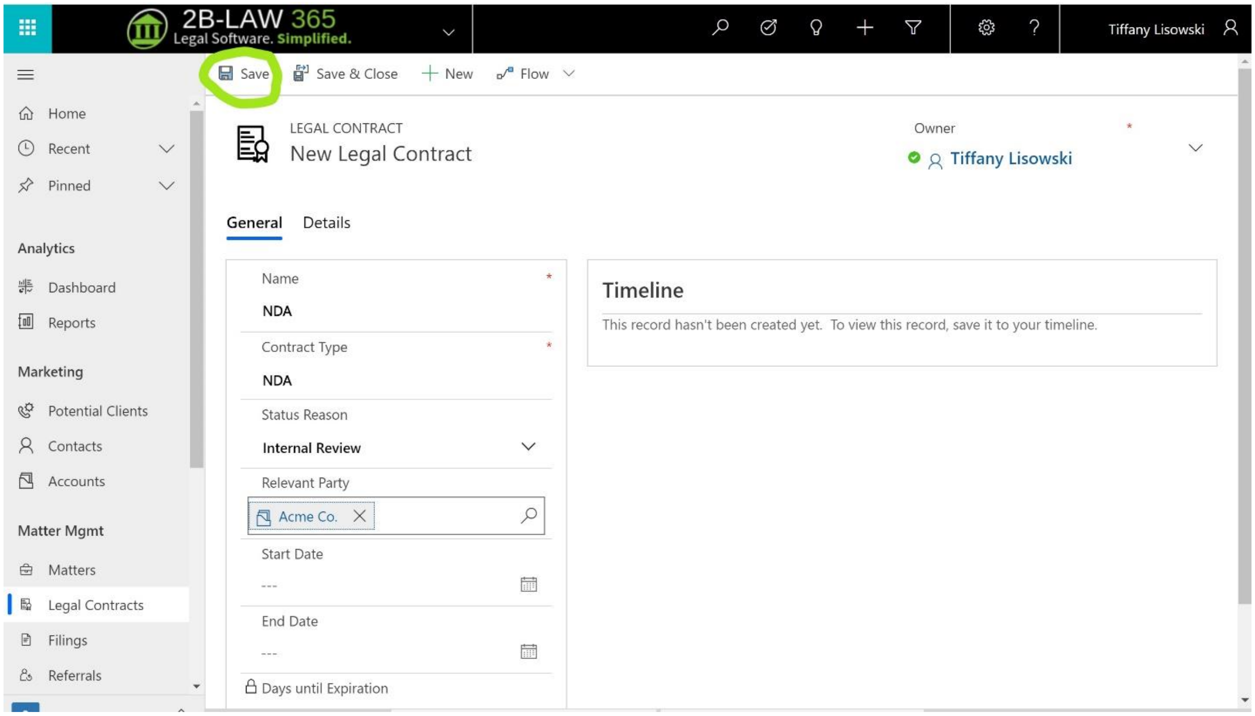
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Legal Contracts.**



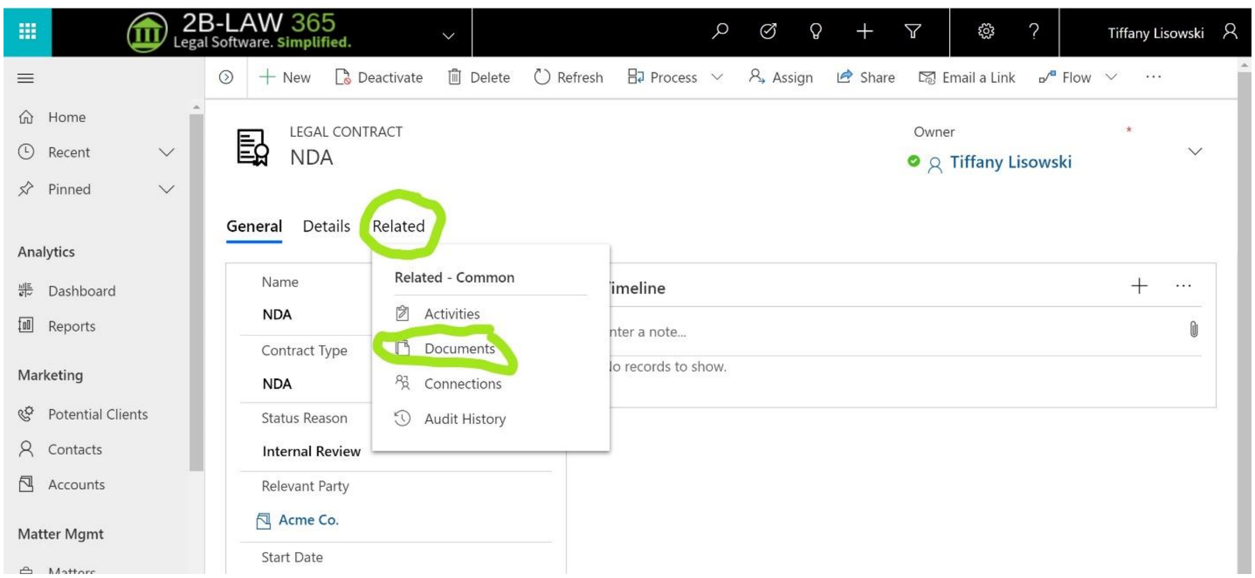
2. **The default view shows Active Legal Contracts. To enter a new Legal Contract, Click +NEW.**



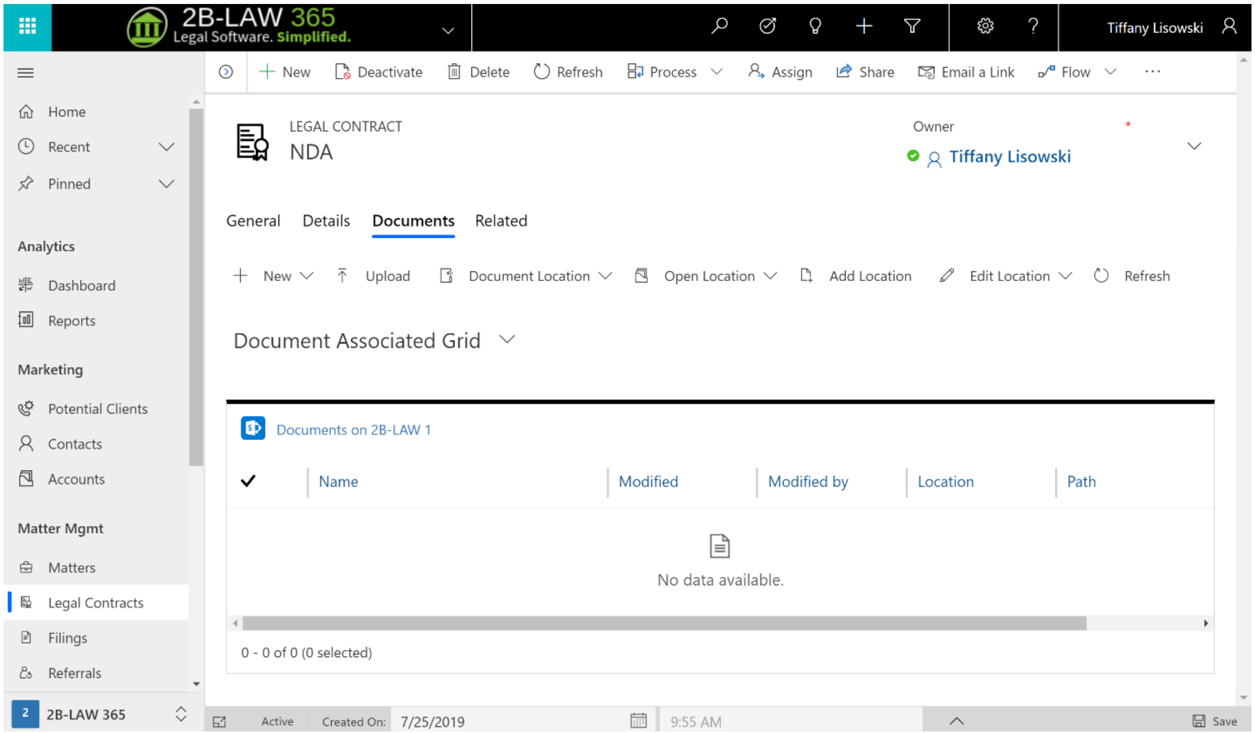
3. **Enter information concerning the Legal Contract and SAVE.**



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



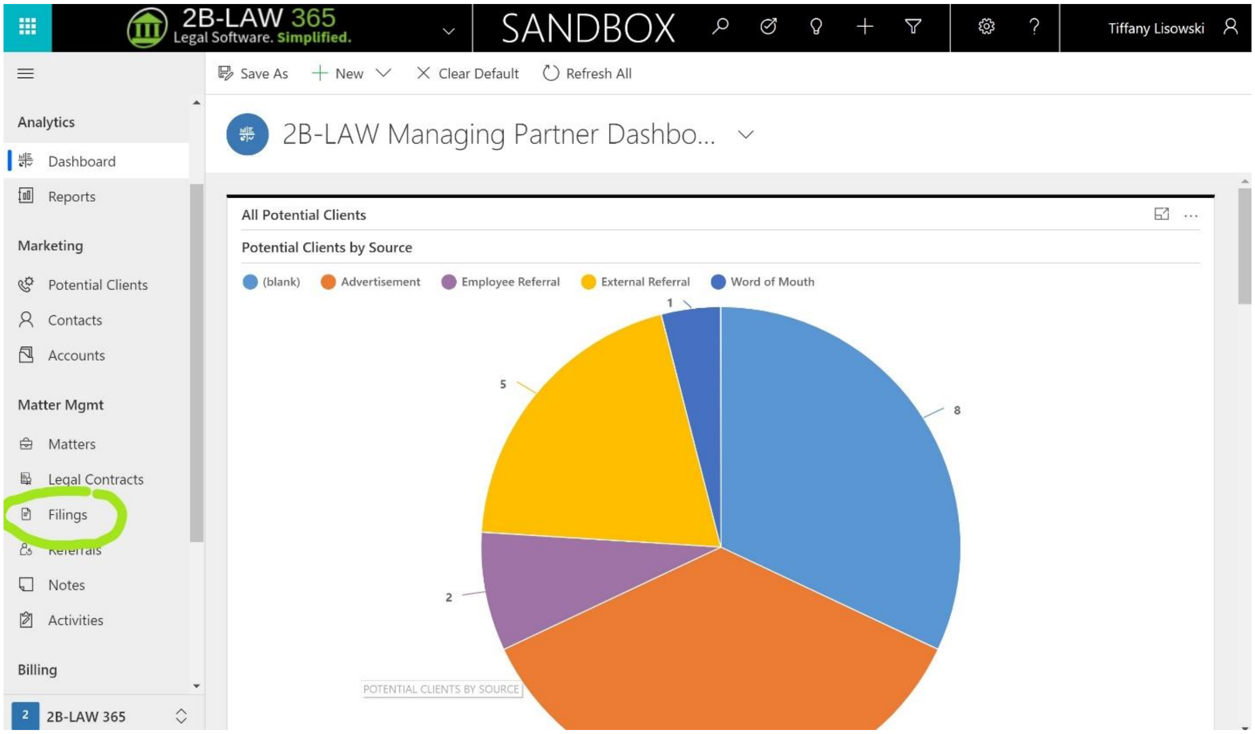
5. **Click on Upload and select the document file to attach.**



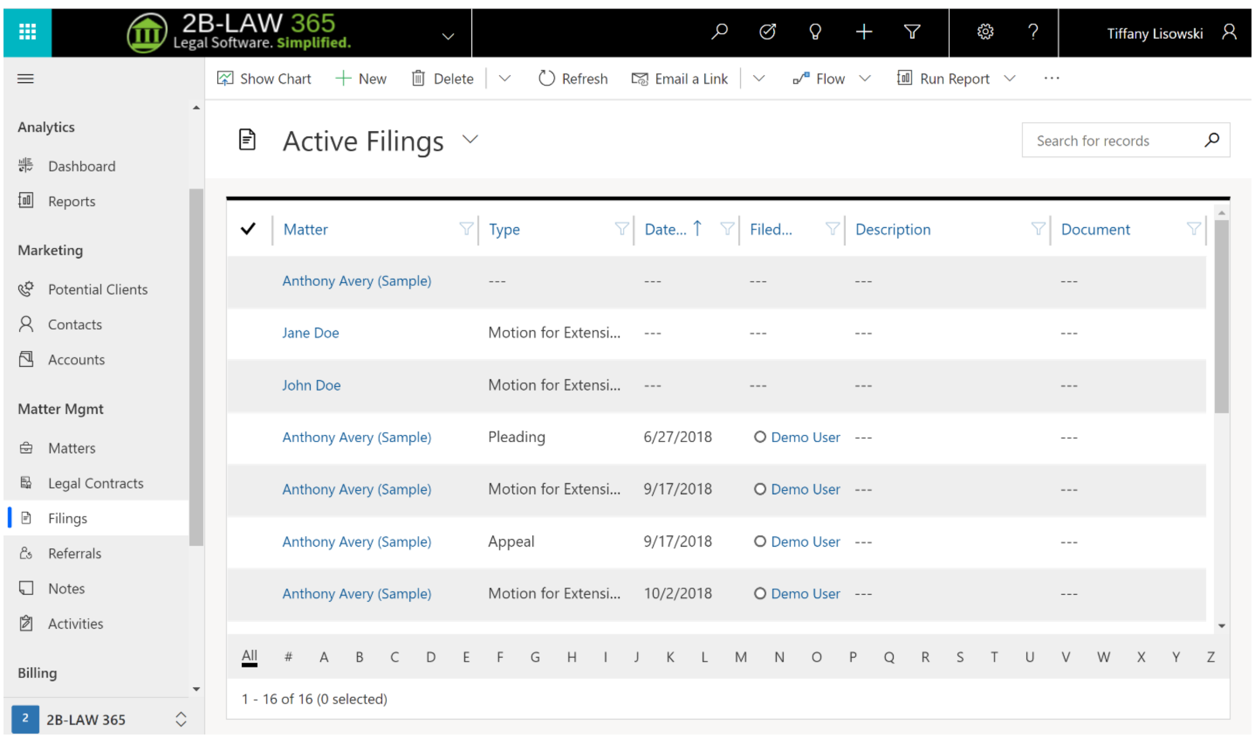
FILINGS

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.

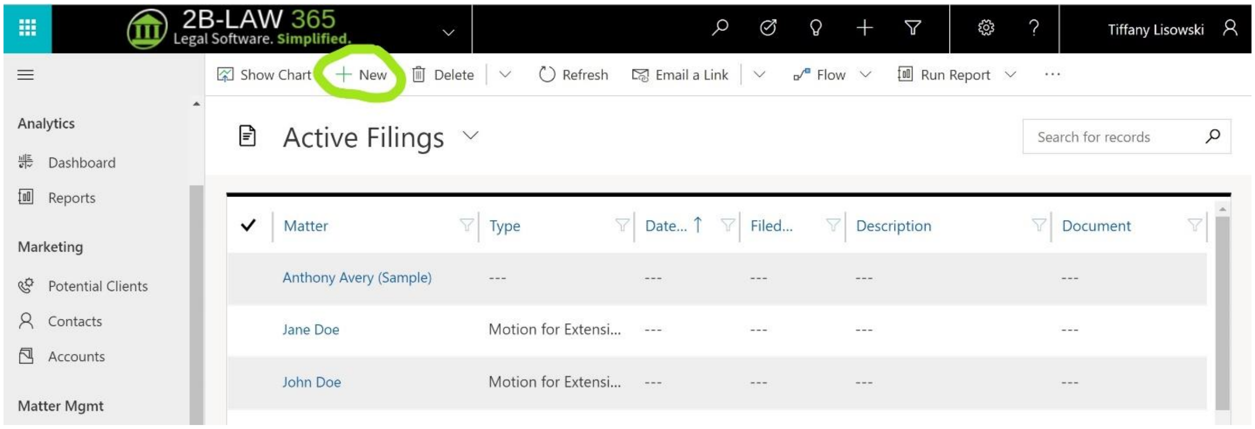
1. **Navigate to 2B-LAW 365 → Filings.**



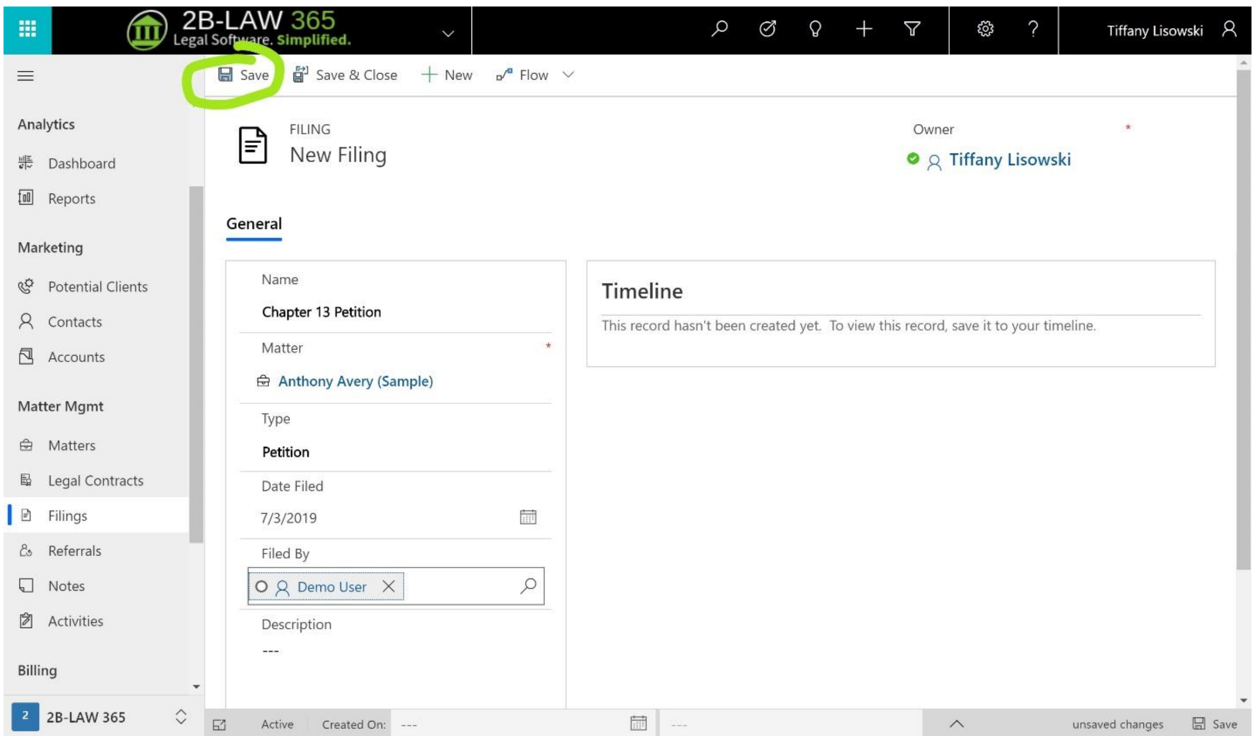
2. **Within Filings, the default view is "Active Filings".**



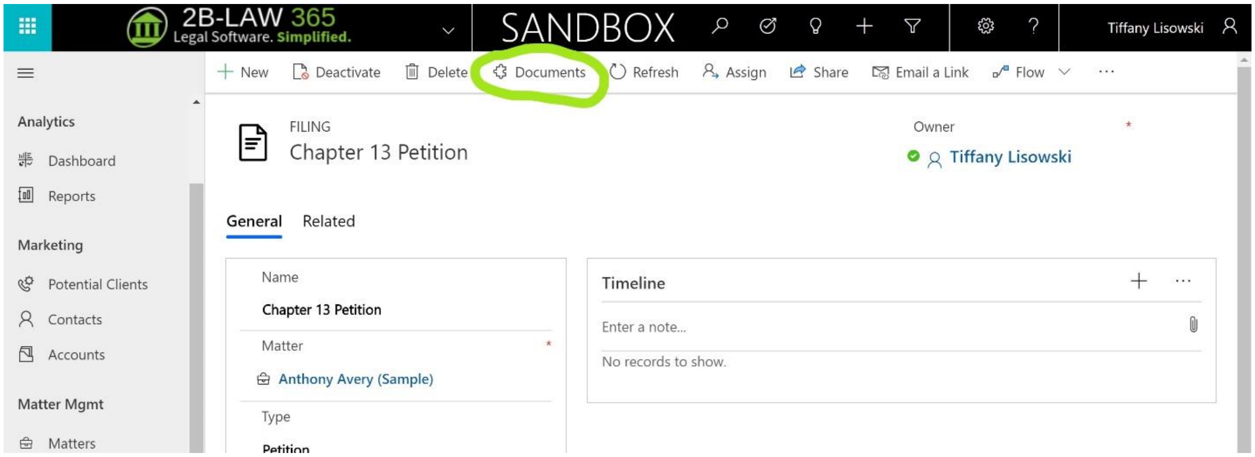
3. **To enter a new Filings record, click +NEW.**



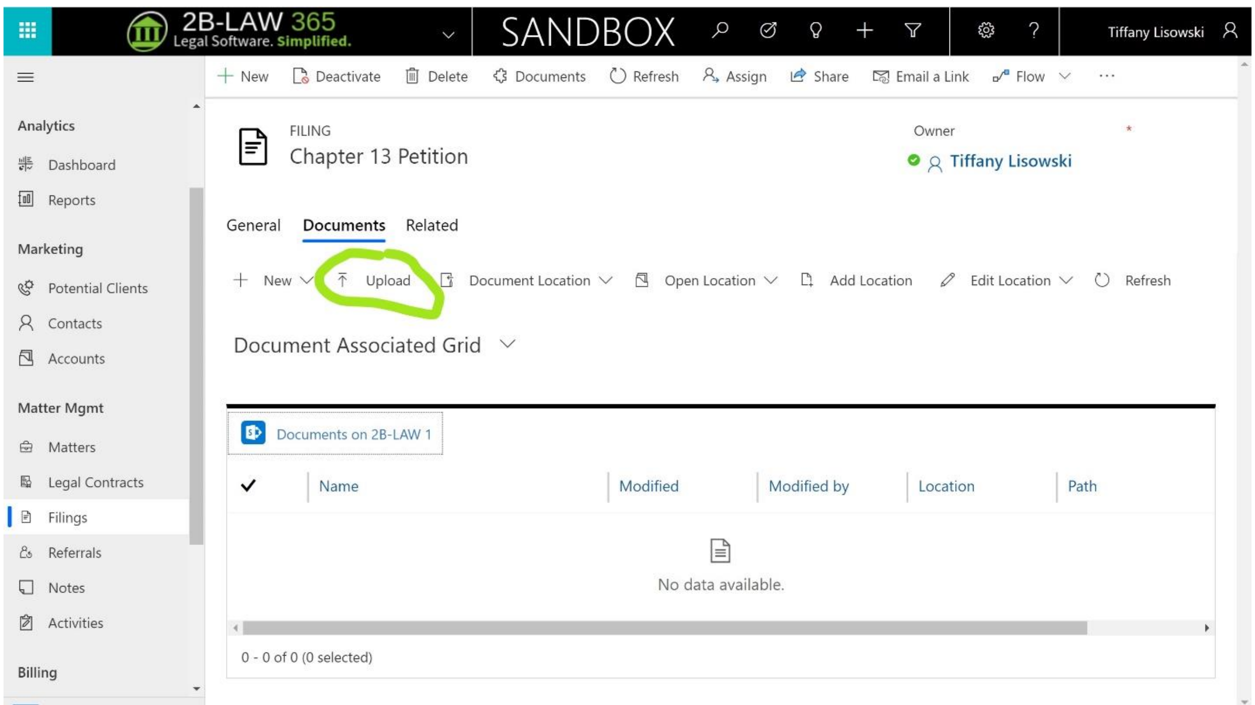
4. **Enter applicable information and SAVE.**



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



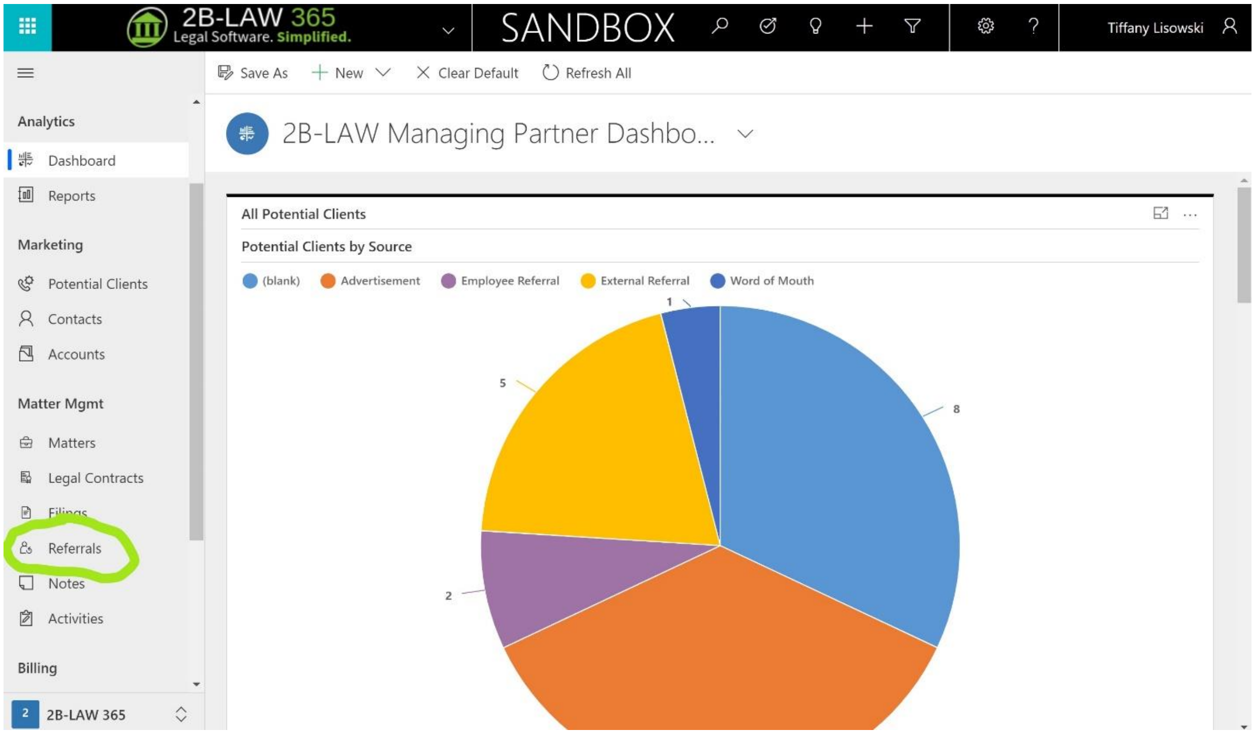
6. **Click on "Upload" and select the document.**



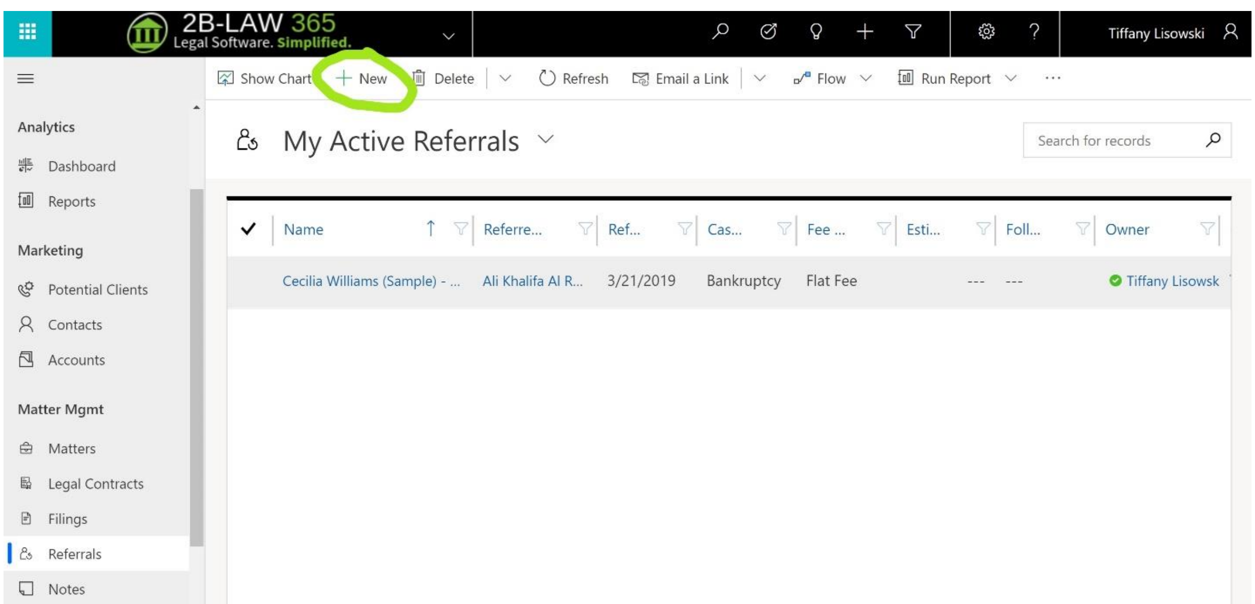
REFERRALS

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.

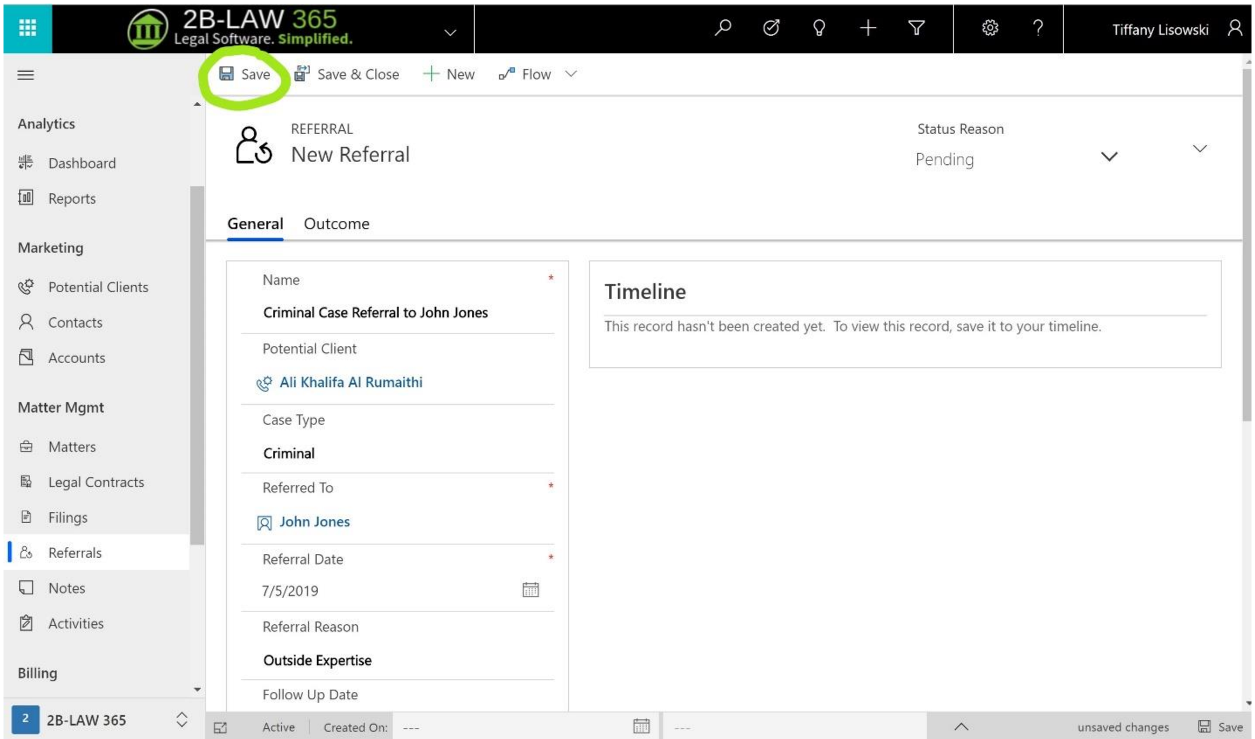
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Referrals**



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

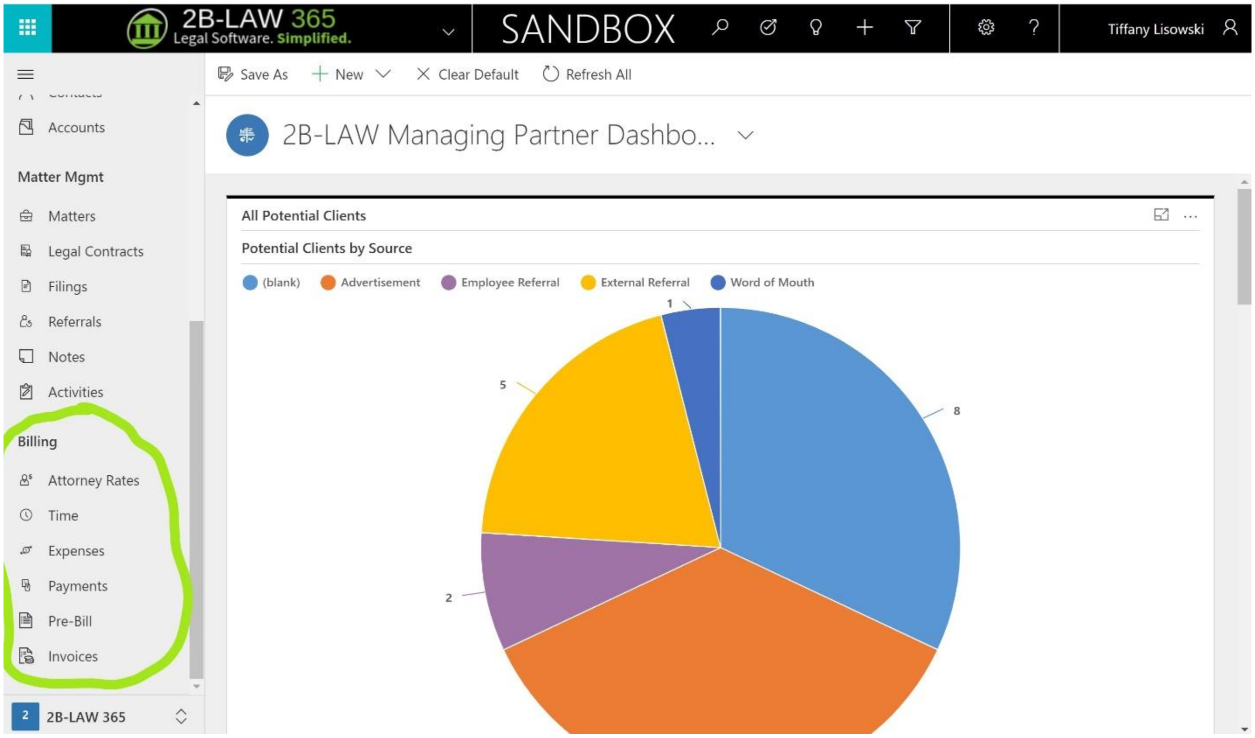


3. **Enter information regarding Referral and SAVE.**


2B-LAW 365
Legal Software. Simplified.
Tiffany Lisowski
Save
Save & Close
New
Flow
Analytics
Dashboard
Reports
Marketing
Potential Clients
Contacts
Accounts
Matter Mgmt
Matters
Legal Contracts
Filings
Referrals
Notes
Activities
Billing
2B-LAW 365
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.
Active
Created On:
unsaved changes
Save

BILLING

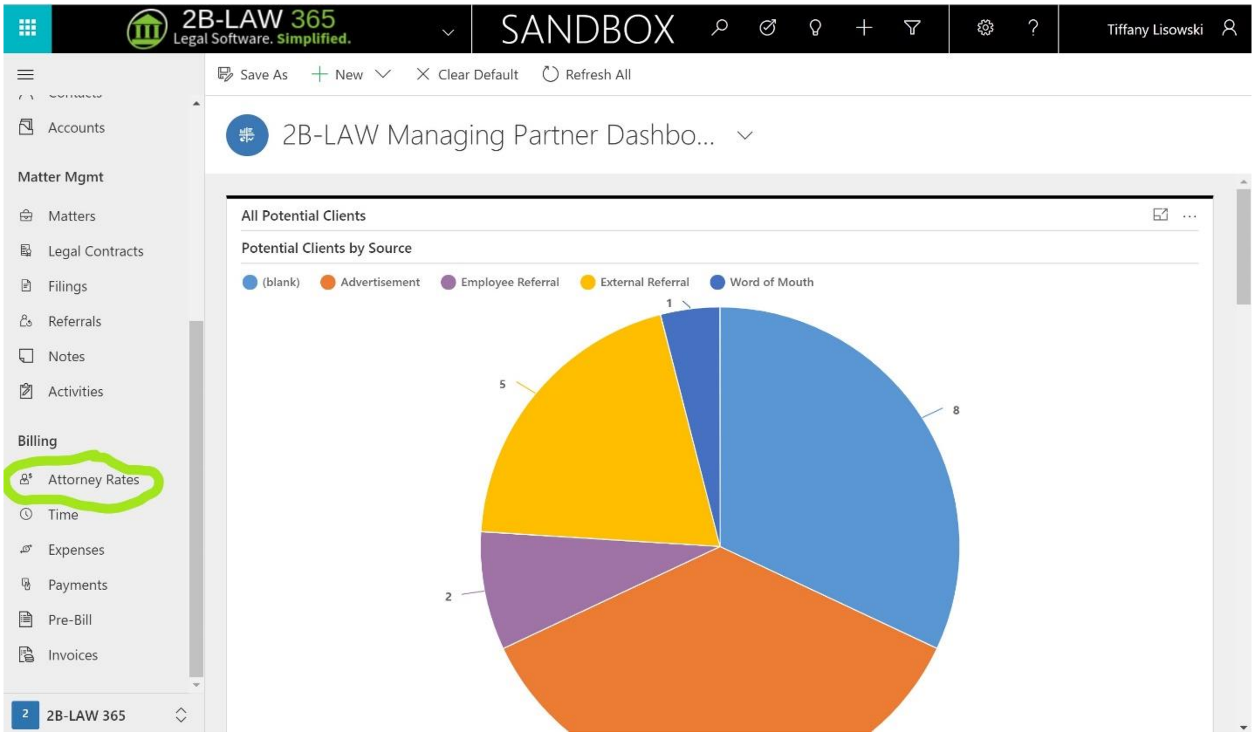
The Billing section of 2B-LAW is meant to provide a basic accounting function and includes entities to enter Attorney Rates which deviate from the default billing rates, enter Time and Expenses, as well as track Payments and create Pre-Bills and Invoices.



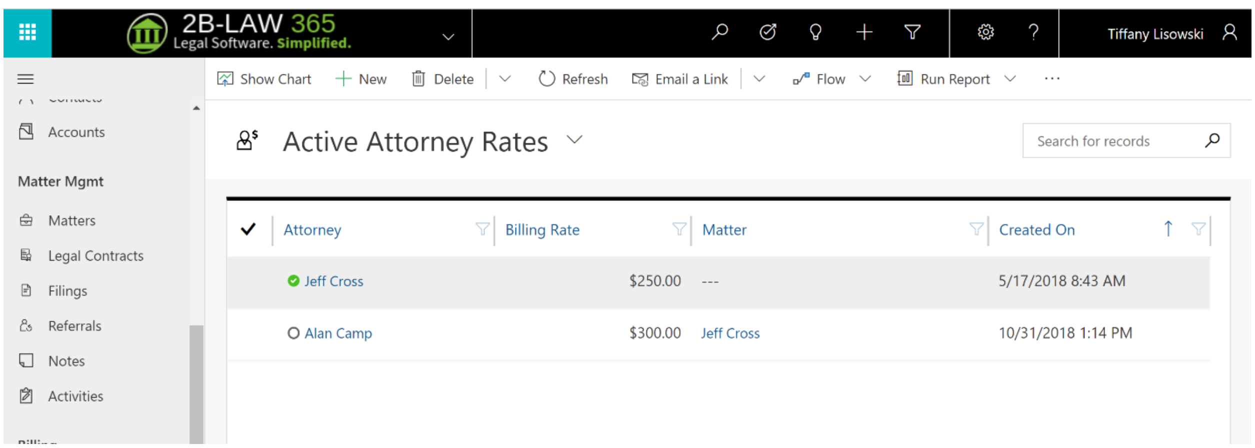
Set an Attorney Billing Rate for a Specific Matter

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:

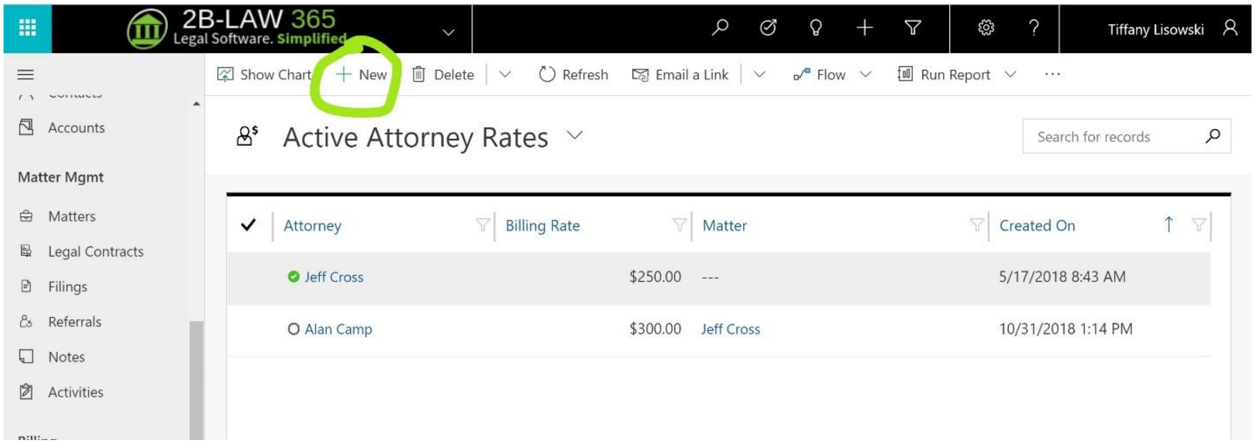
1. **Navigate to 2B-LAW 365 → Billing → Attorney Rates**



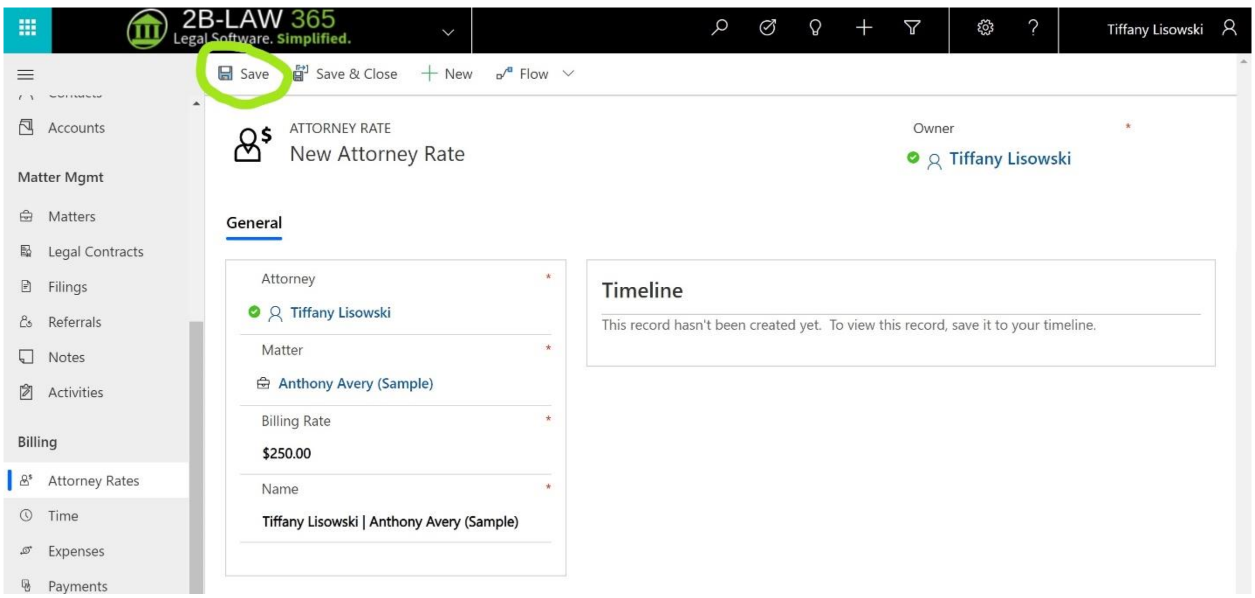
2. **Within Attorney Rates, the default view shows all Active Attorney Rates.**



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



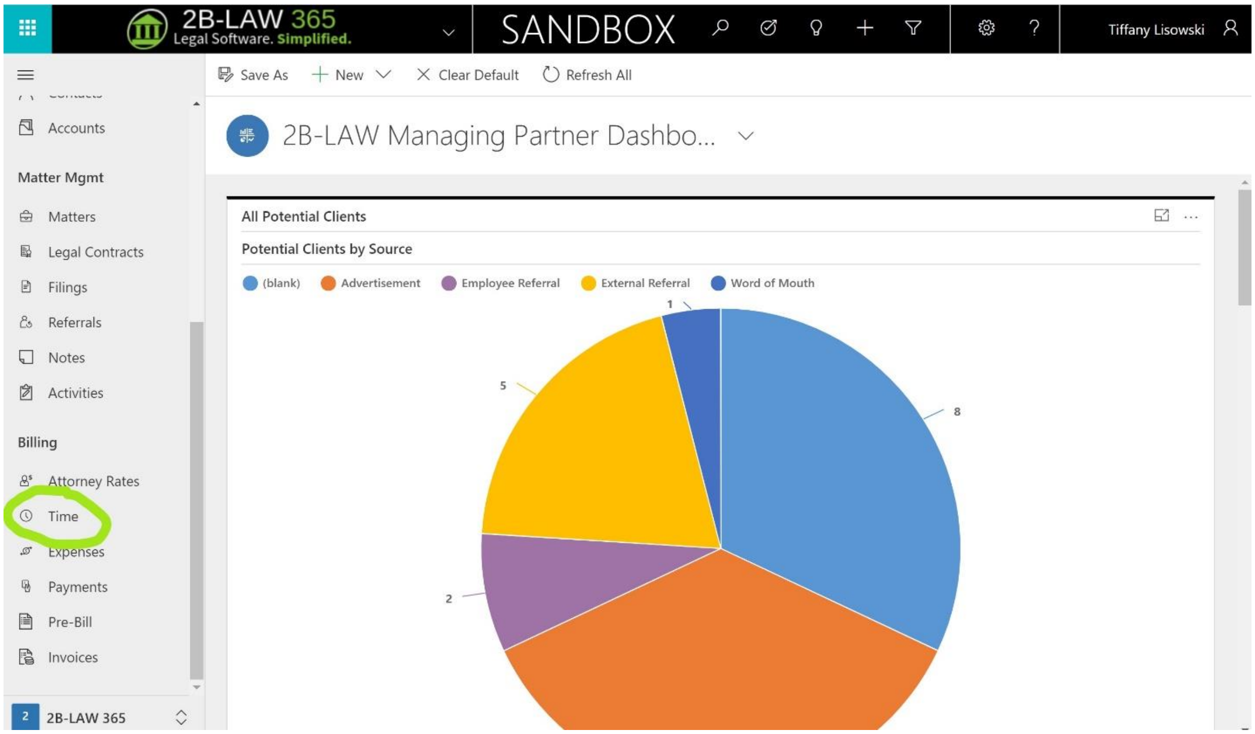
4. **Within Attorney Rate record, enter all pertinent information. Note that the fields are "lookup fields". This attaches the Attorney Rate record to an attorney and to the matter requiring the alternative billing rate. Click "SAVE" before existing.**



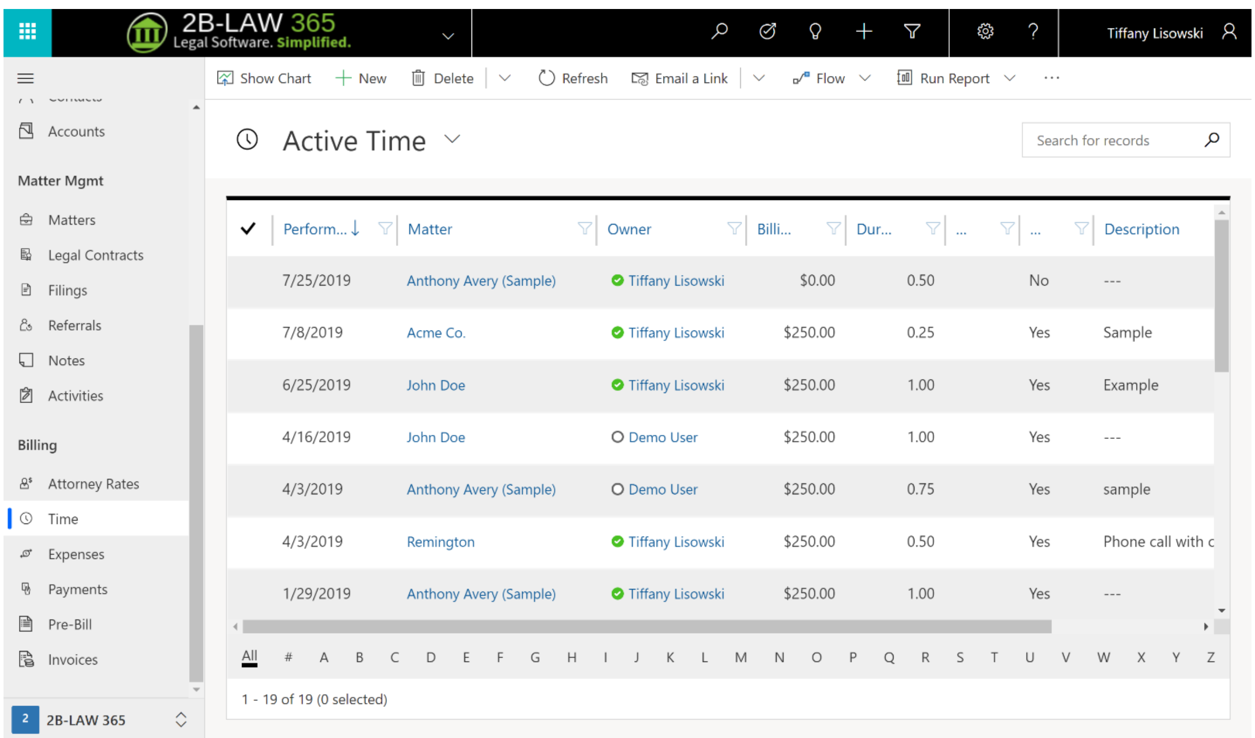
Time Entries

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.

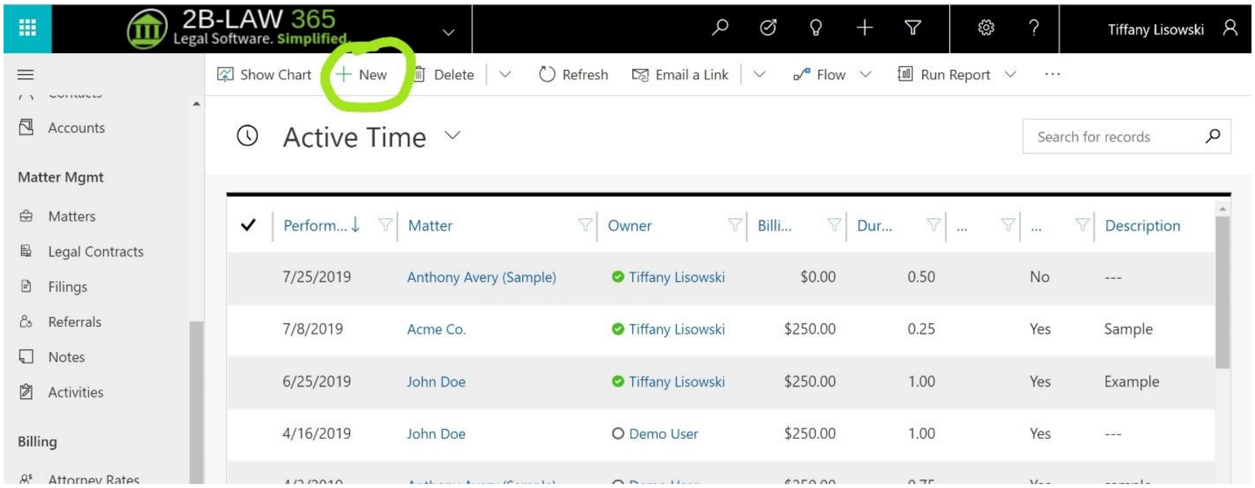
1. **Navigate to 2B-LAW 365 → Billing → Time.**



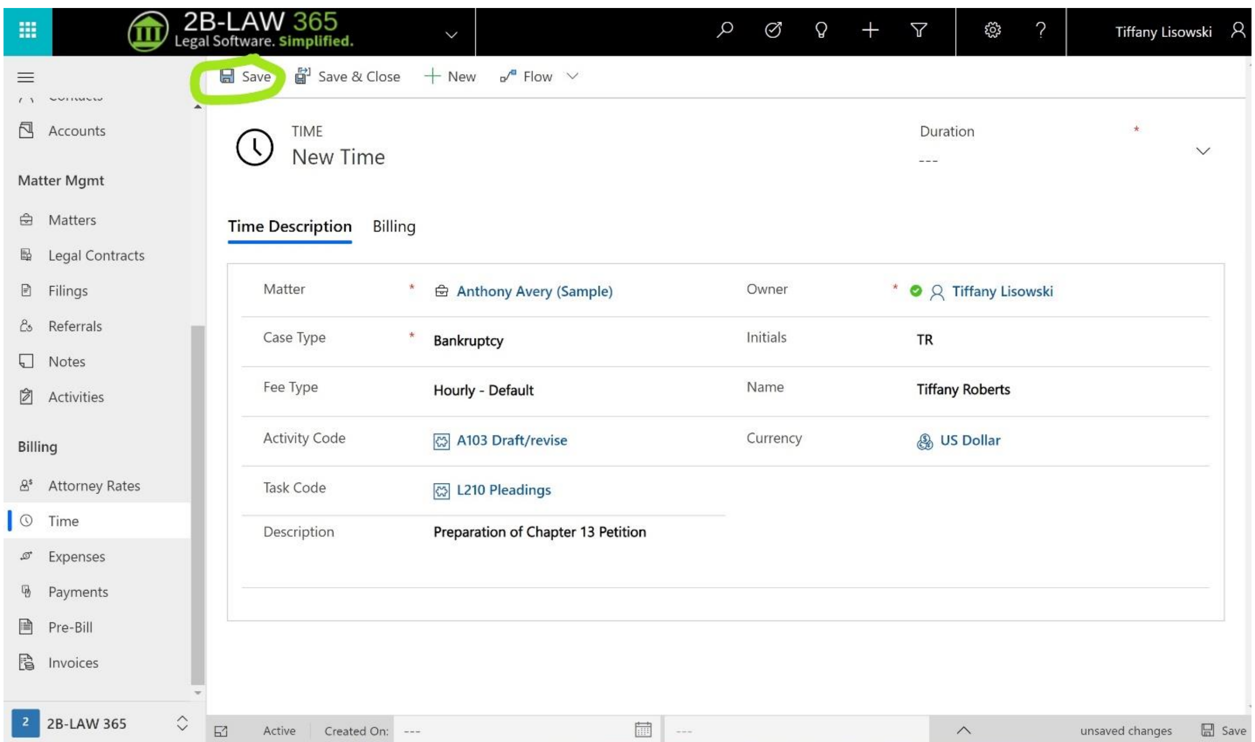
2. Within Time, the default view shows all Active Time entries.



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



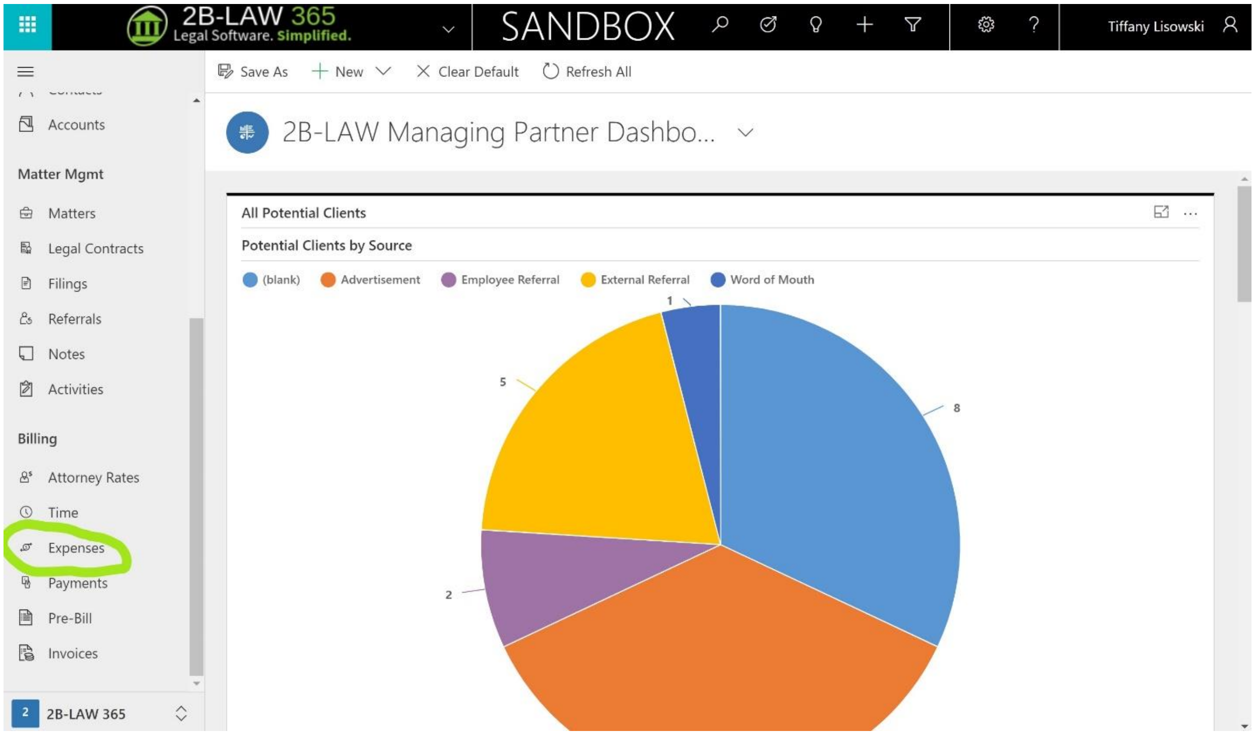
4. **Enter pertinent information for the Time entry and SAVE.**



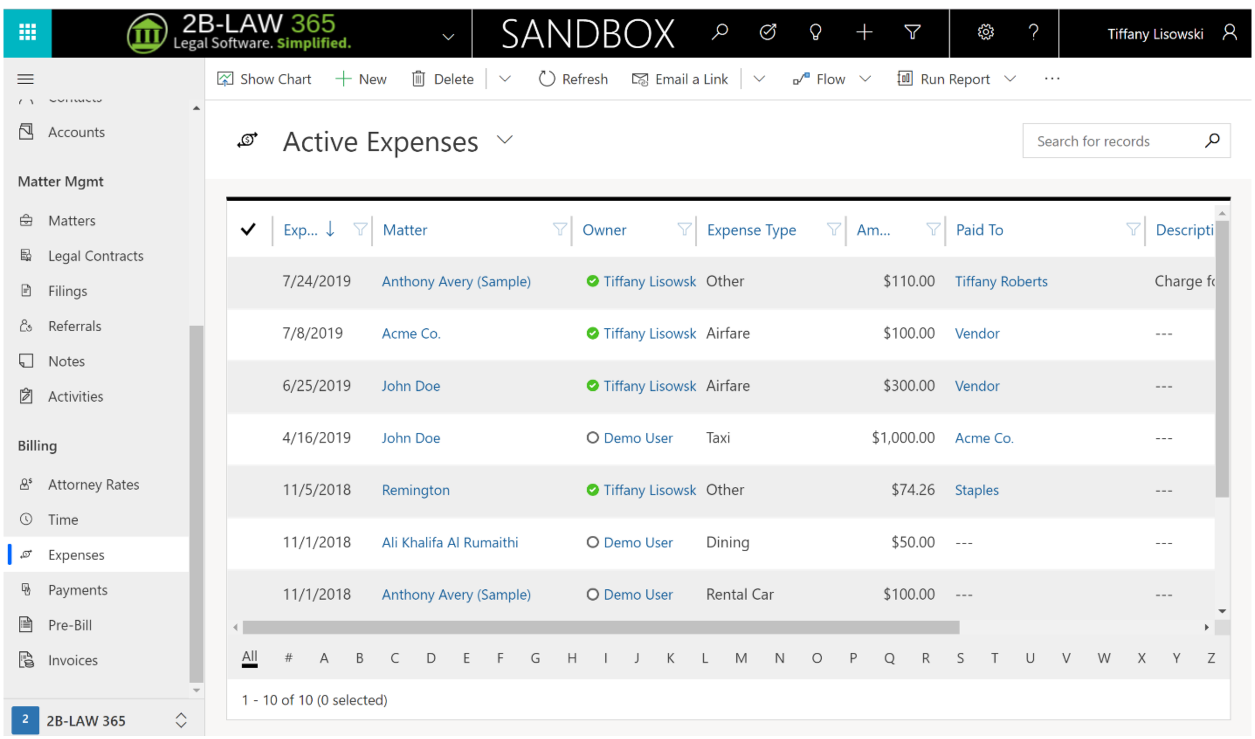
Expense Records

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.

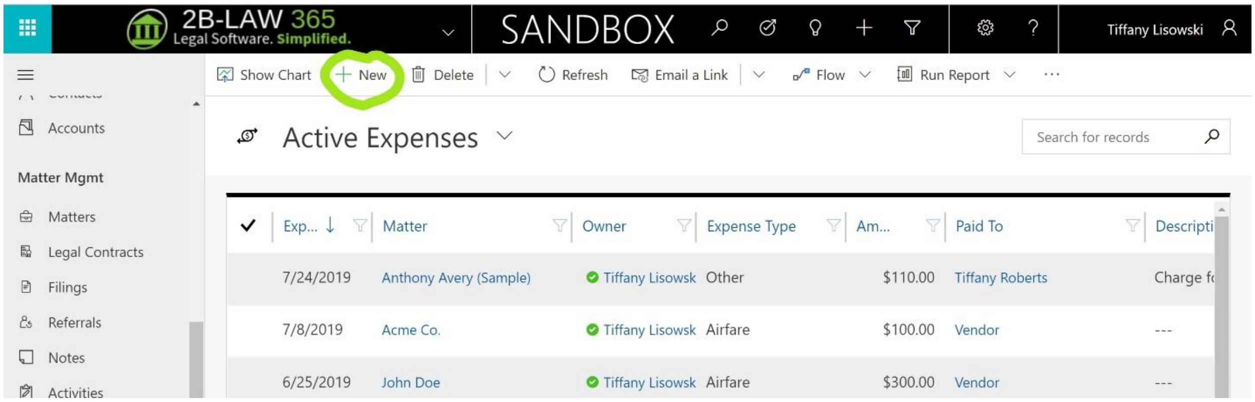
1. **Navigate to 2B-LAW 365 → Billing → Expenses**



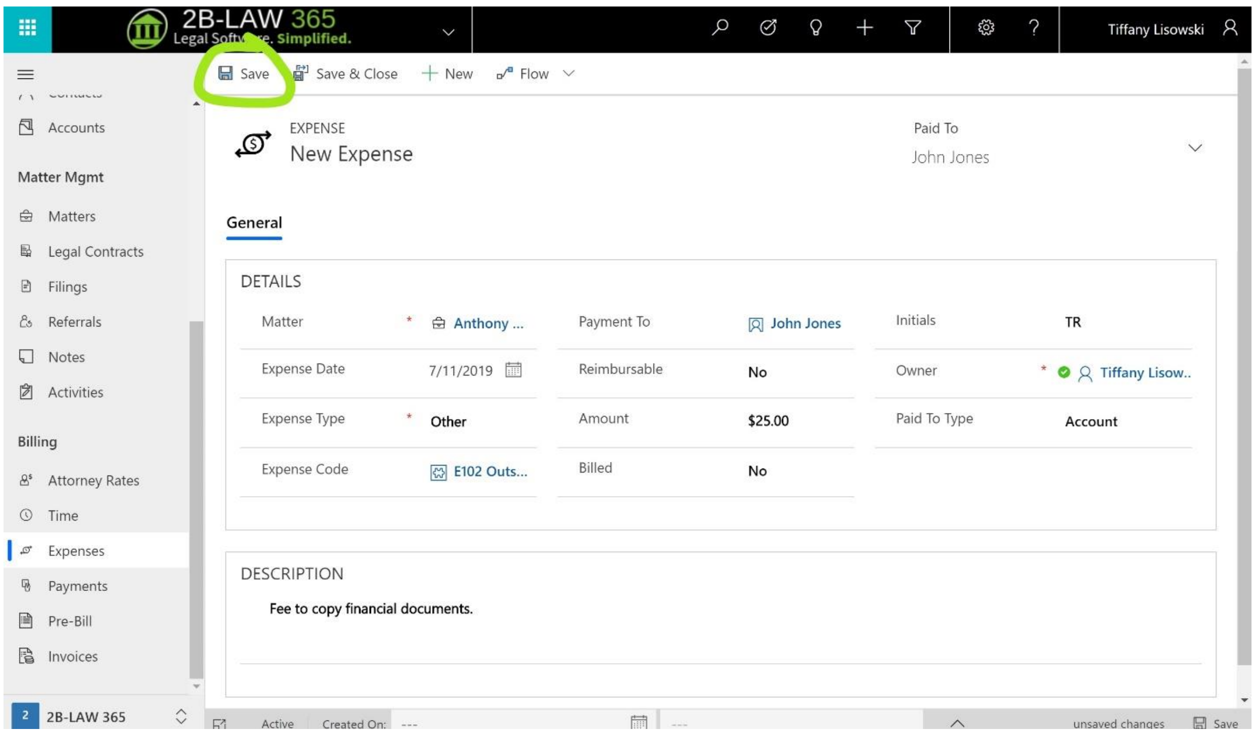
2. Within Expenses, the default view shows all Active Expenses.



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



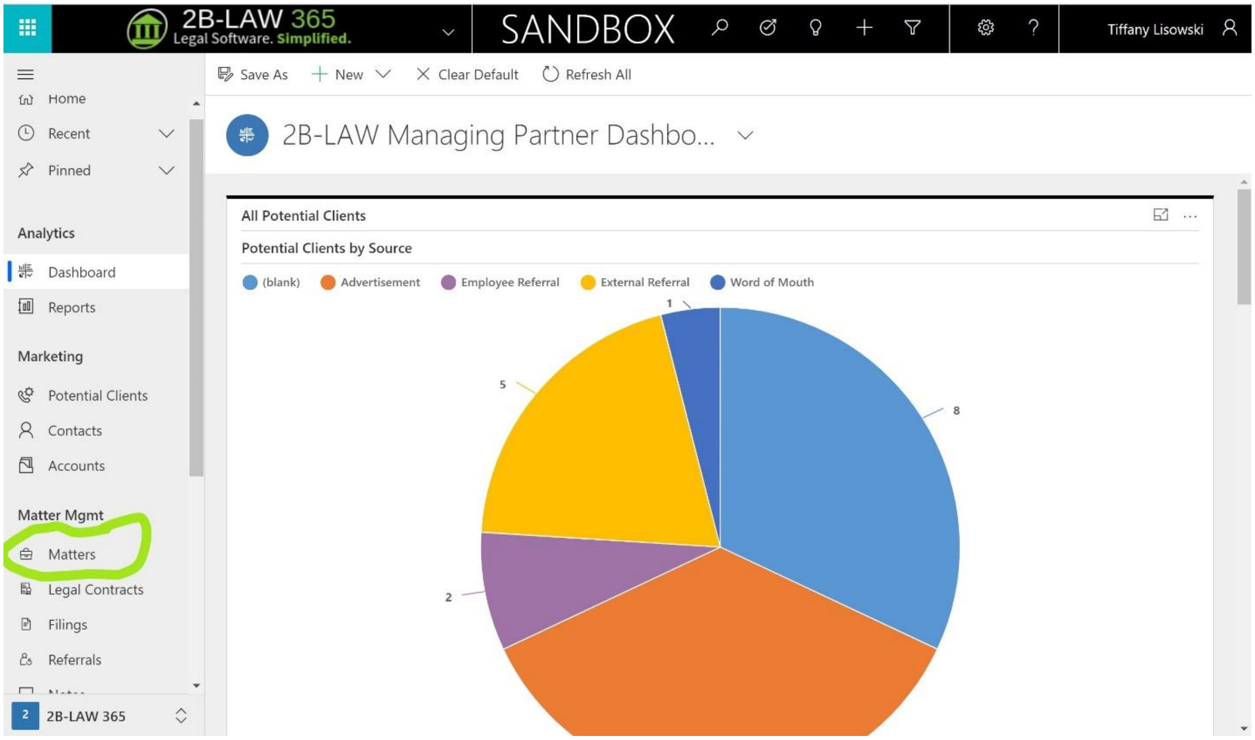
4. **Enter information on Expense form and SAVE.**



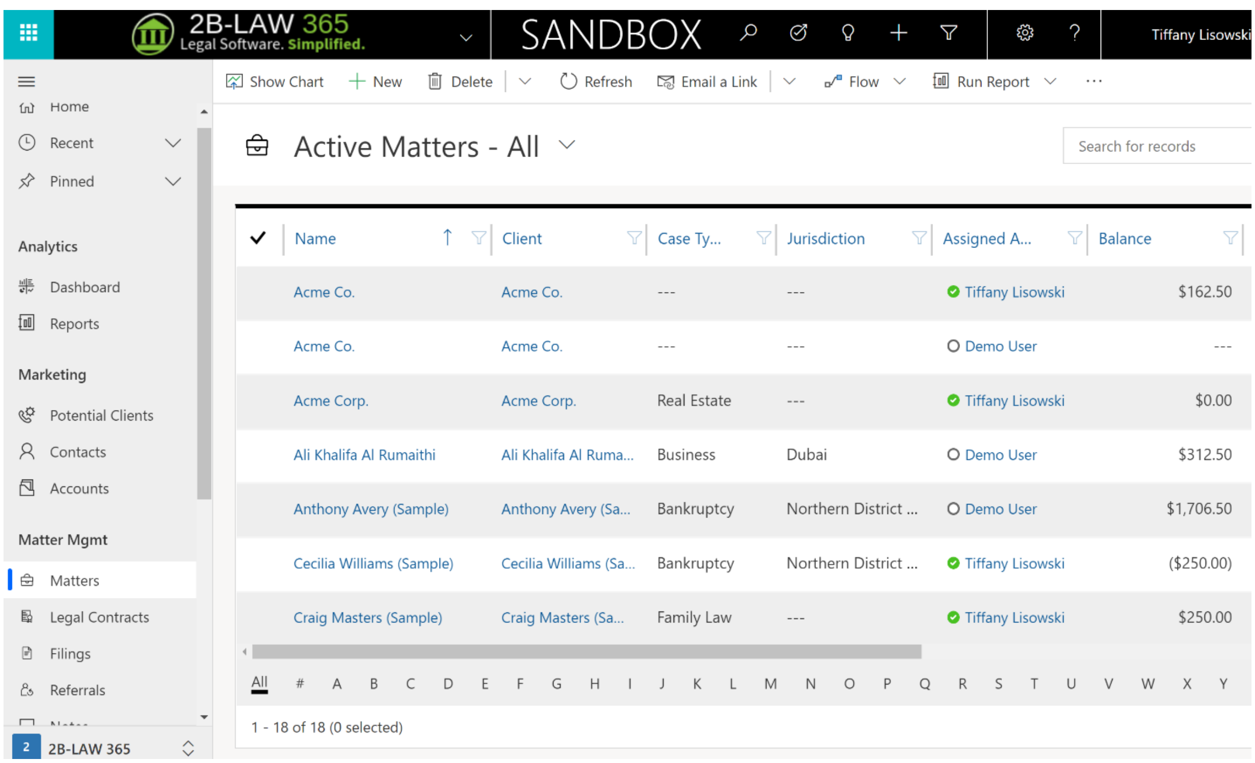
Creating Pre-Bills from within Matter record

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

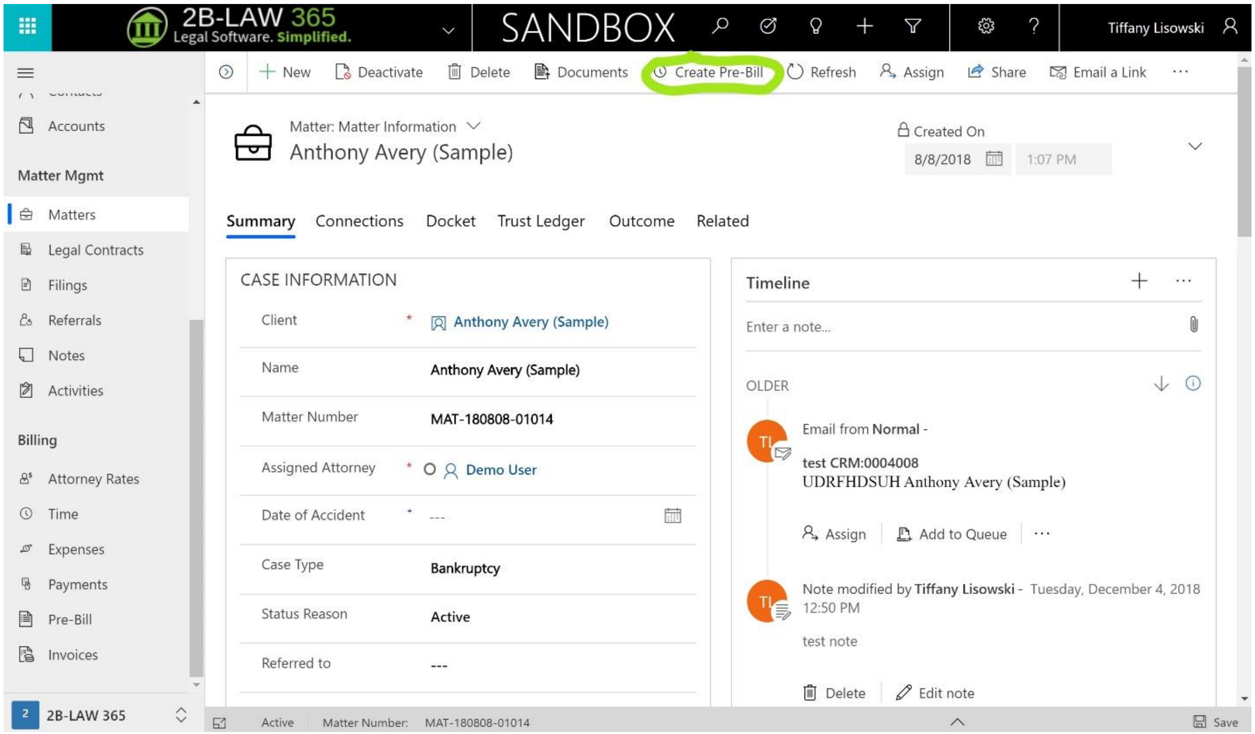
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



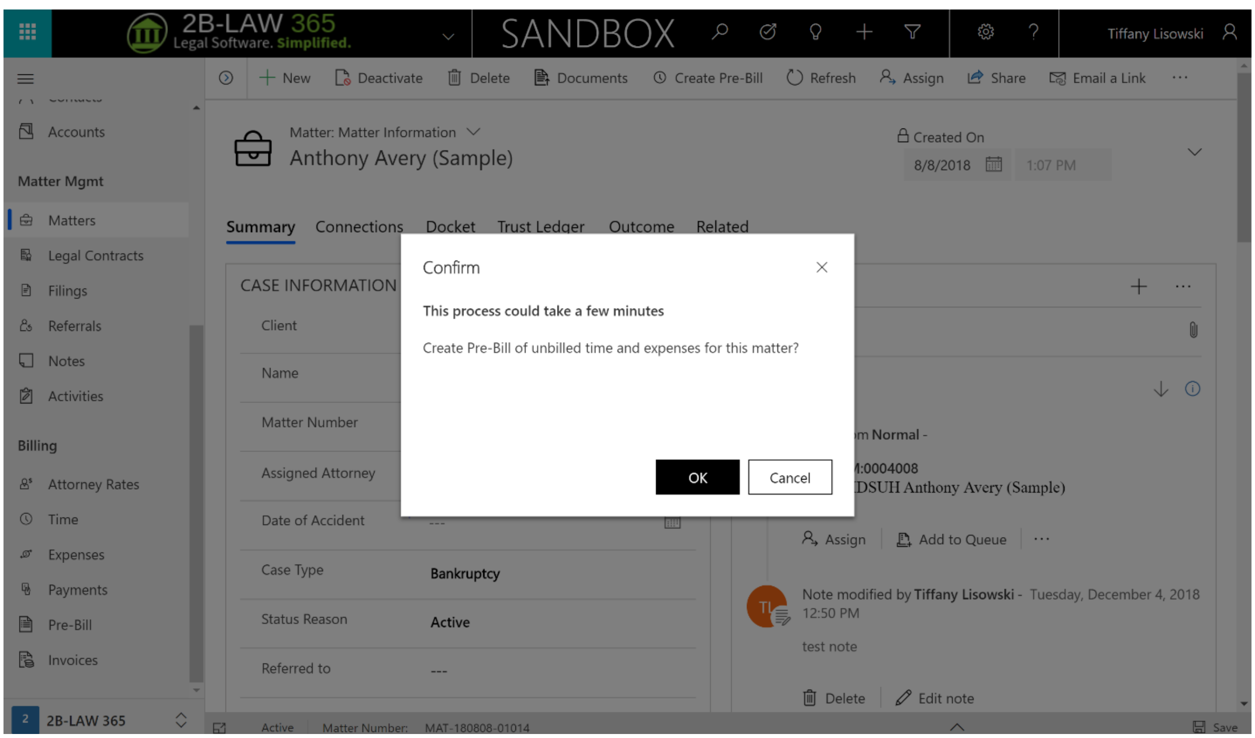
2. **Double-click on the Matter to open Matter record.**



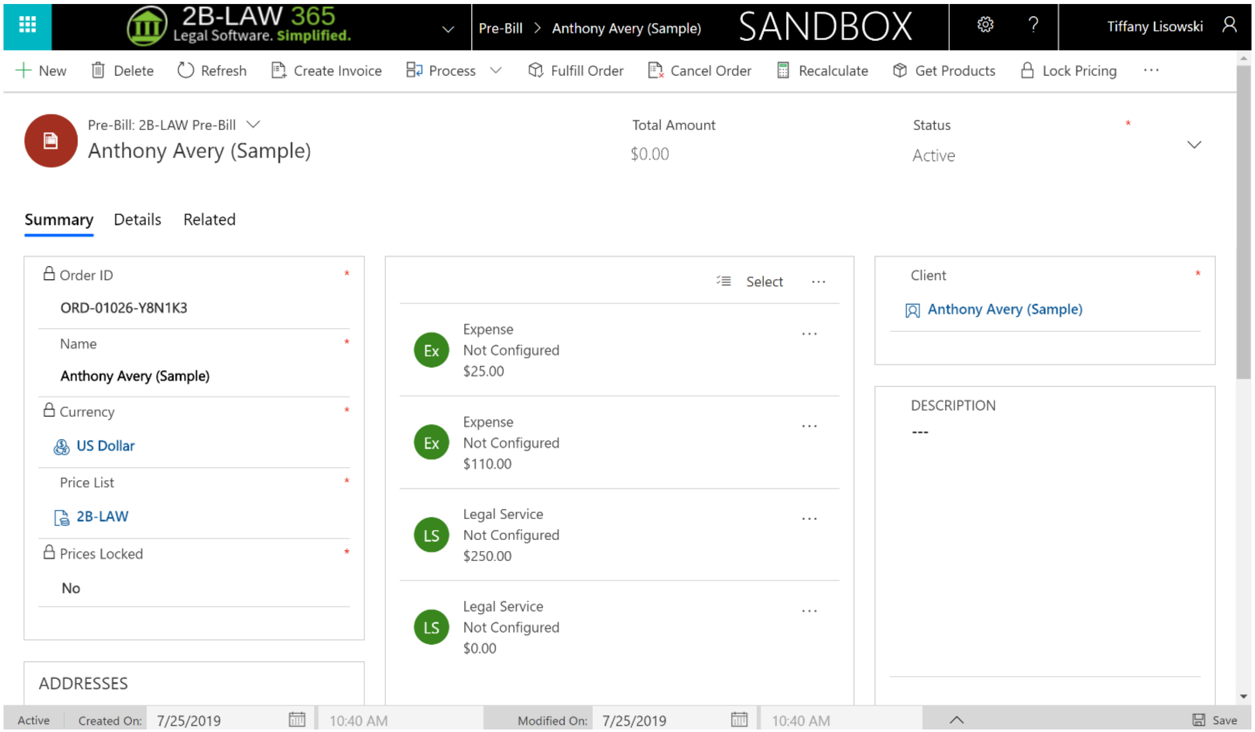
3. **Within the Matter record, click Create Pre-Bill.**



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

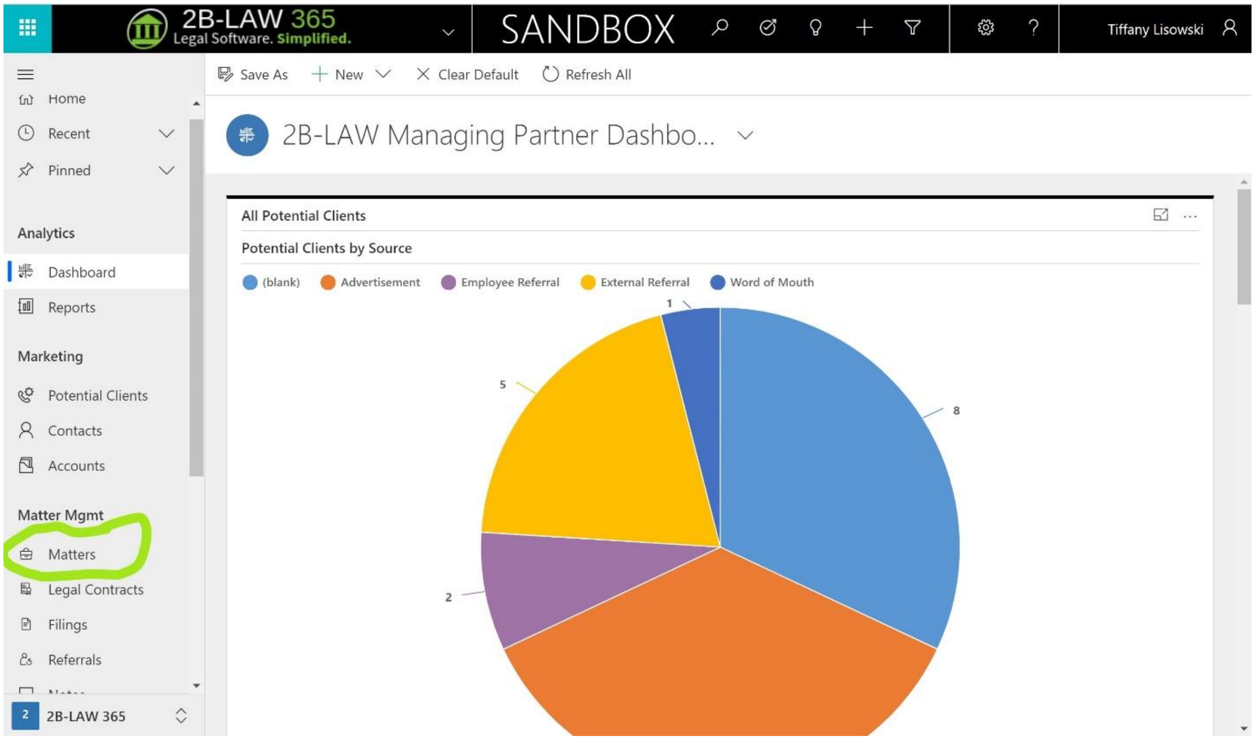


5. **A new screen will pop-up showing the Pre-Bill information. Items on the Pre-Bill can be edited by clicking on that item.**

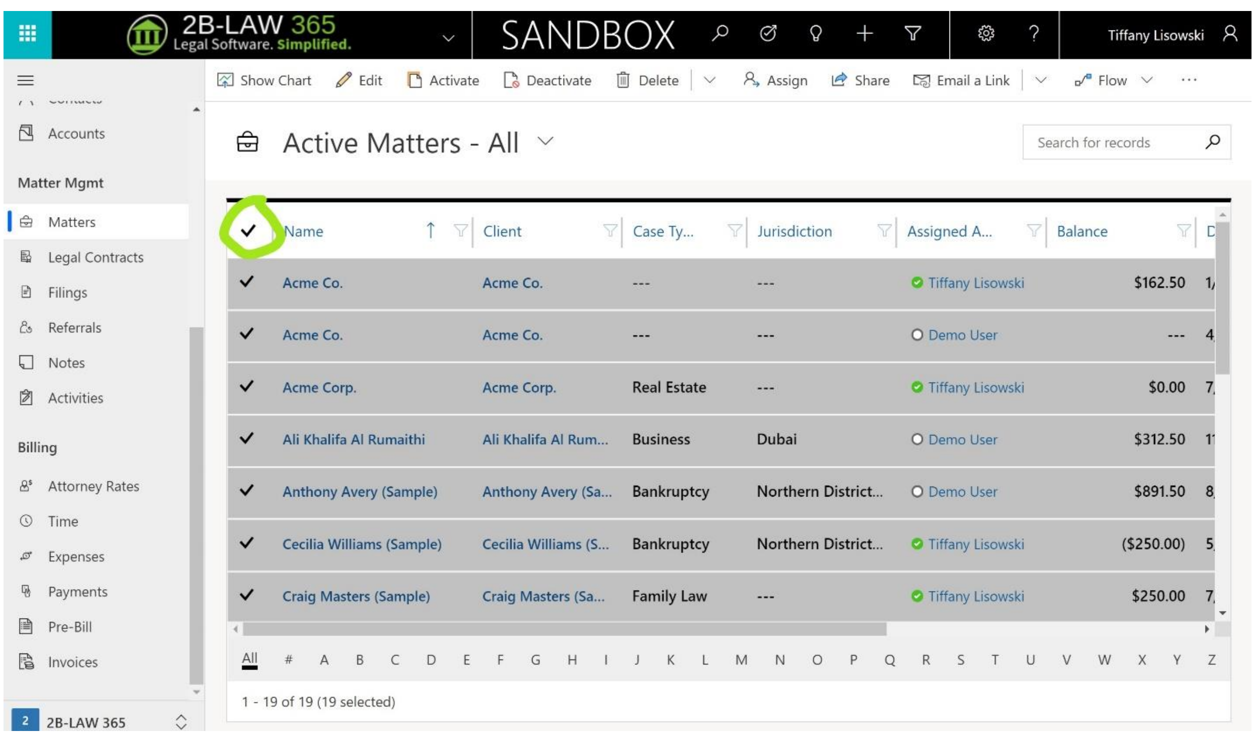


Creating Pre-Bills from All Unbilled Time and Expenses

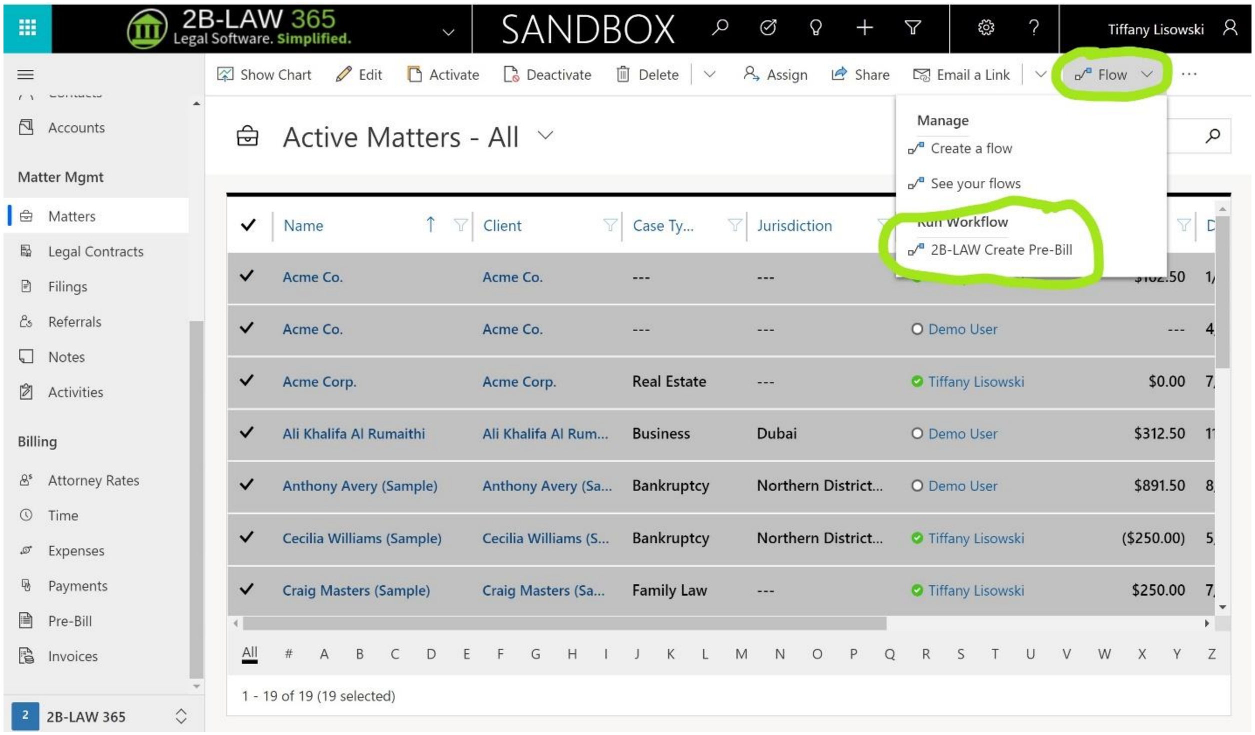
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters.**



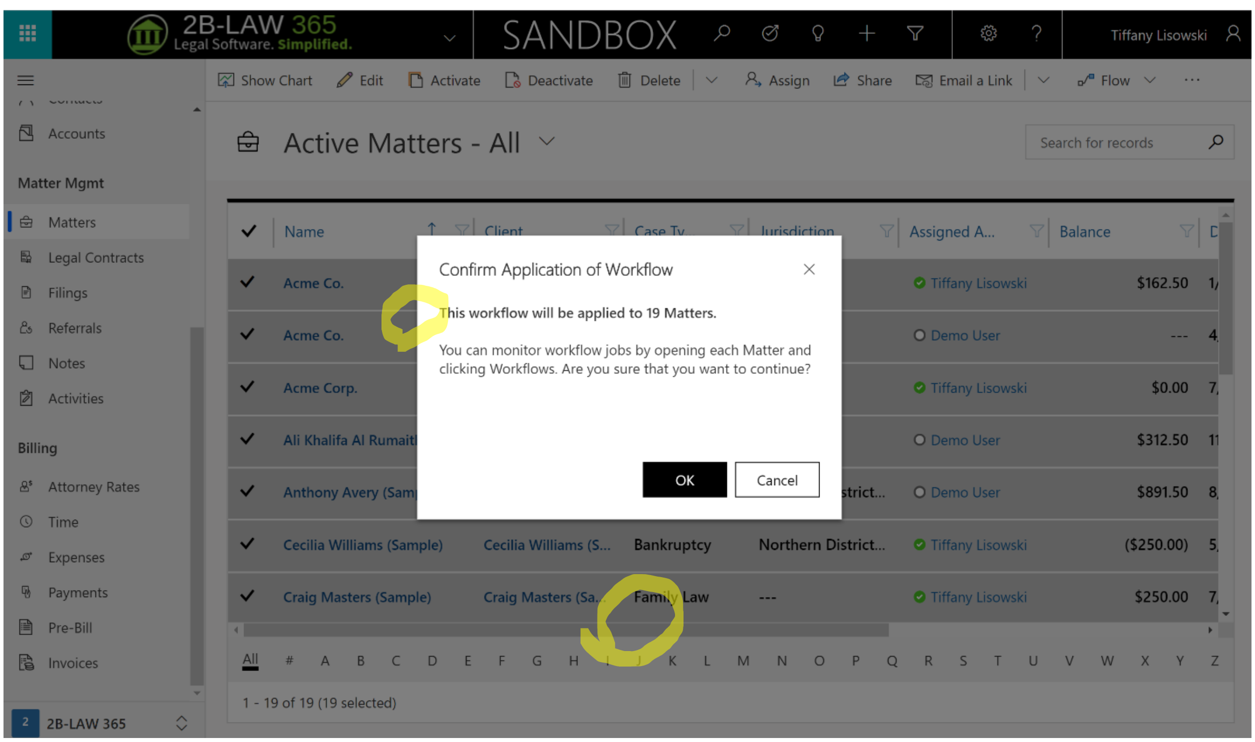
2. Click the top box on Active Matters – All to select all Matters.



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.

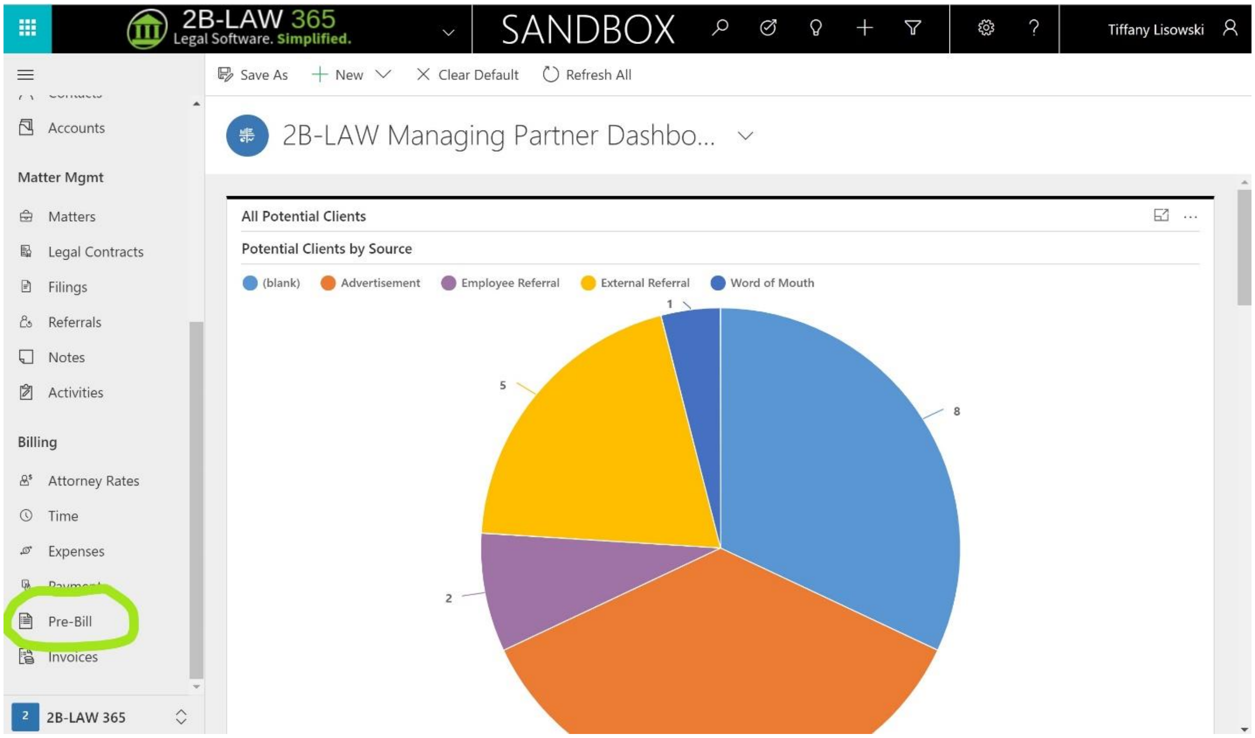


5. Once the workflow has been completed, the Pre-Bills will appear in the Pre-Bill section. See Viewing Pre-Bills.

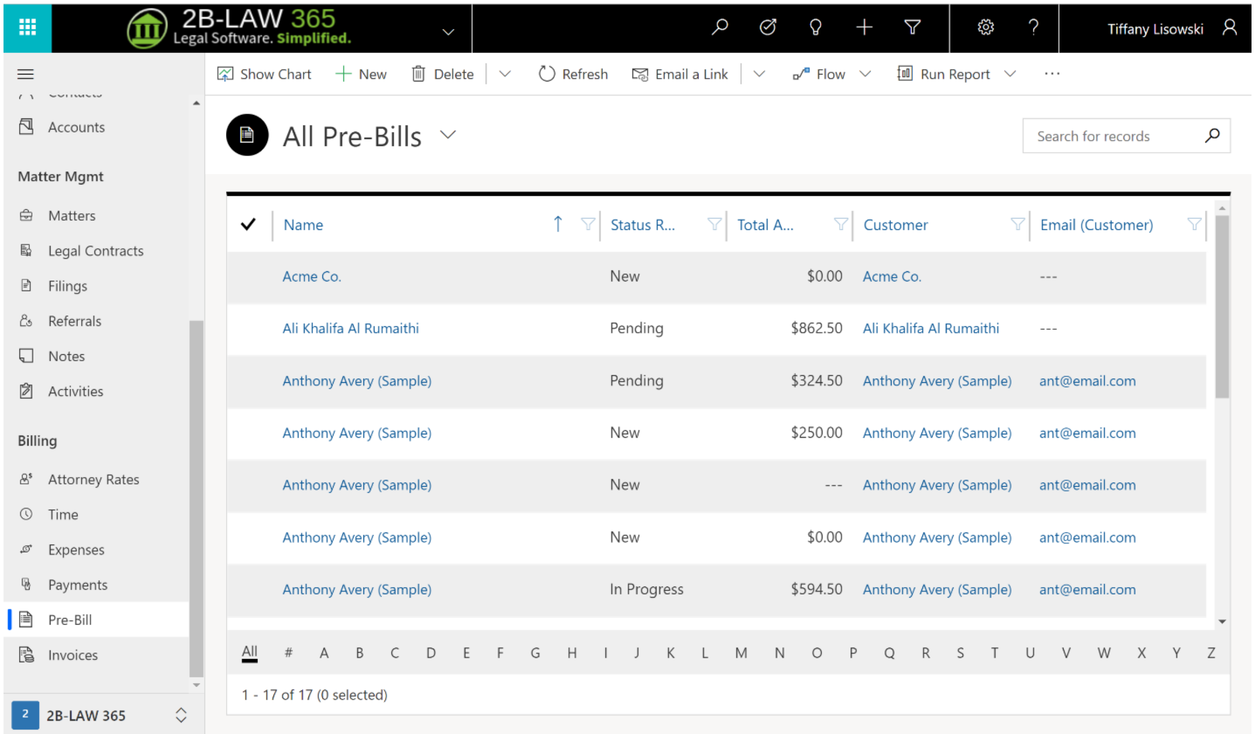
Viewing Pre-Bills

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

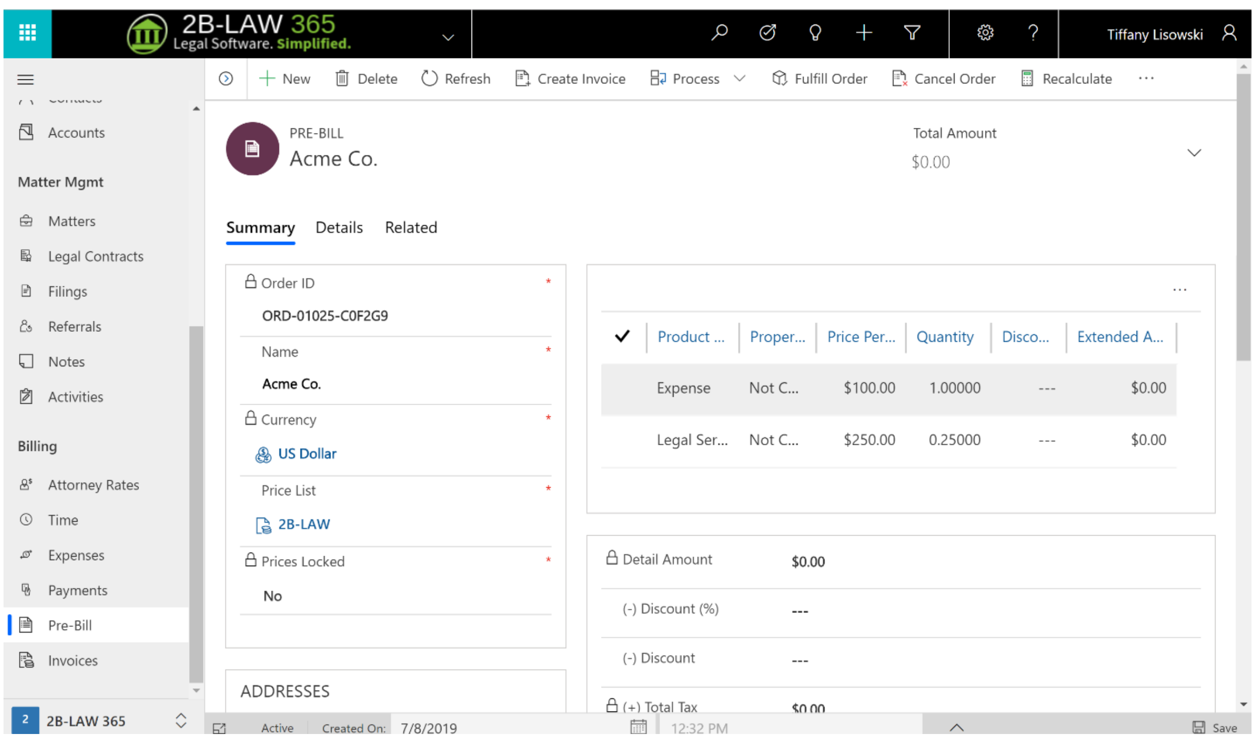
1. **Navigate to 2B-LAW 365 → Billing → Pre-Bills**



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



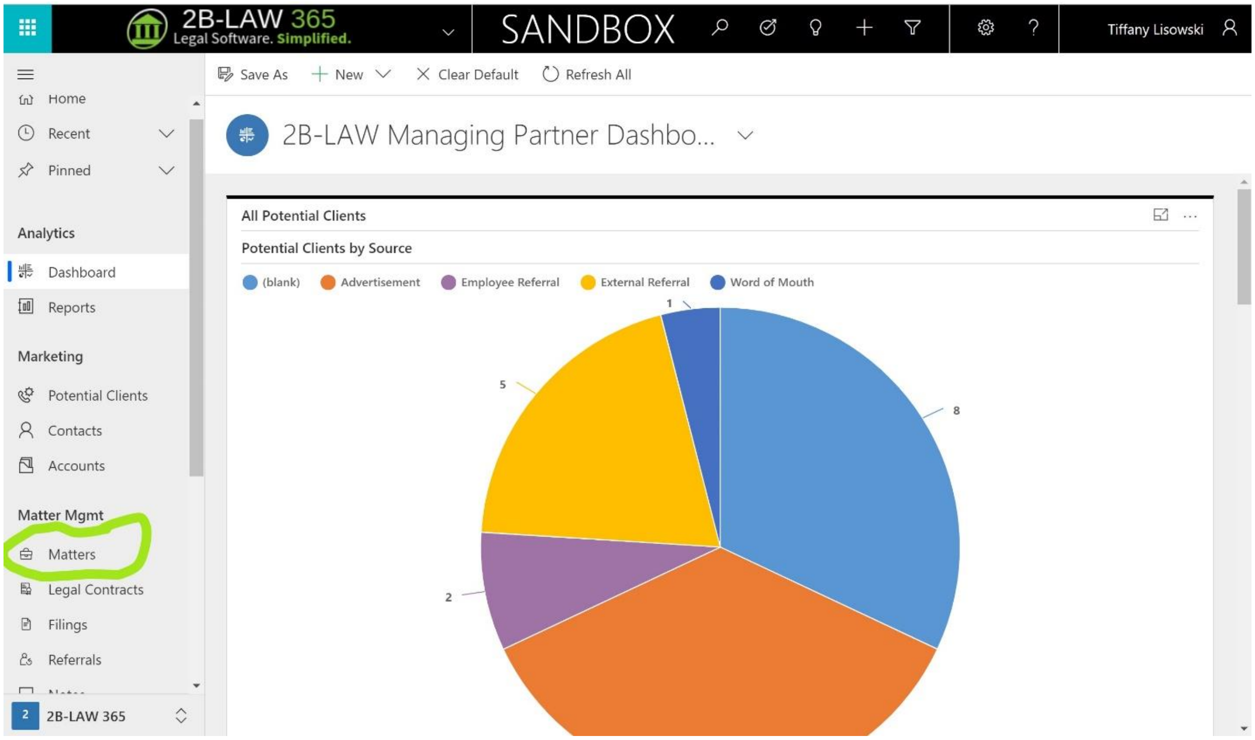
3. **Within the Pre-Bill, all unbilled time and expense items are listed, adjustments can be made, etc.**



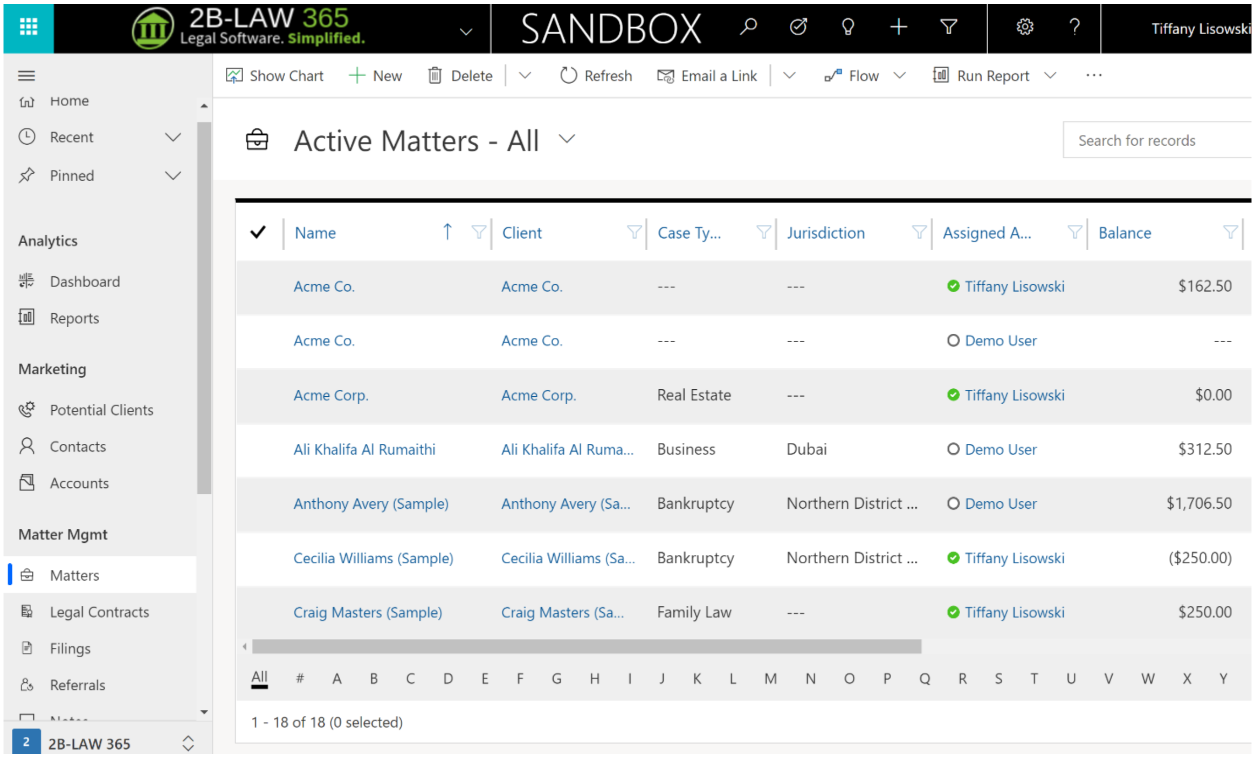
4. **Once a Pre-Bill is approved, create an invoice by following the steps in Convert Pre-Bill to Invoice.**

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

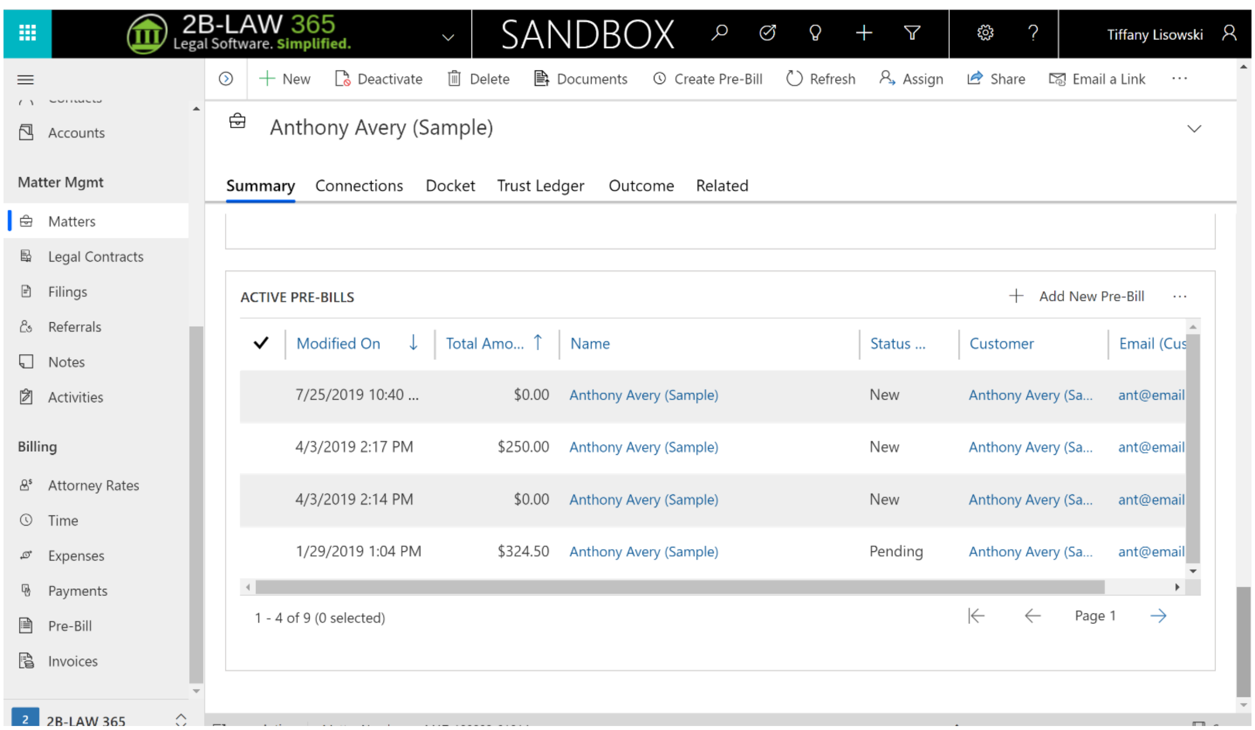
1. **Navigate to 2B-LAW 365 → Matter Mgmt → Matters**



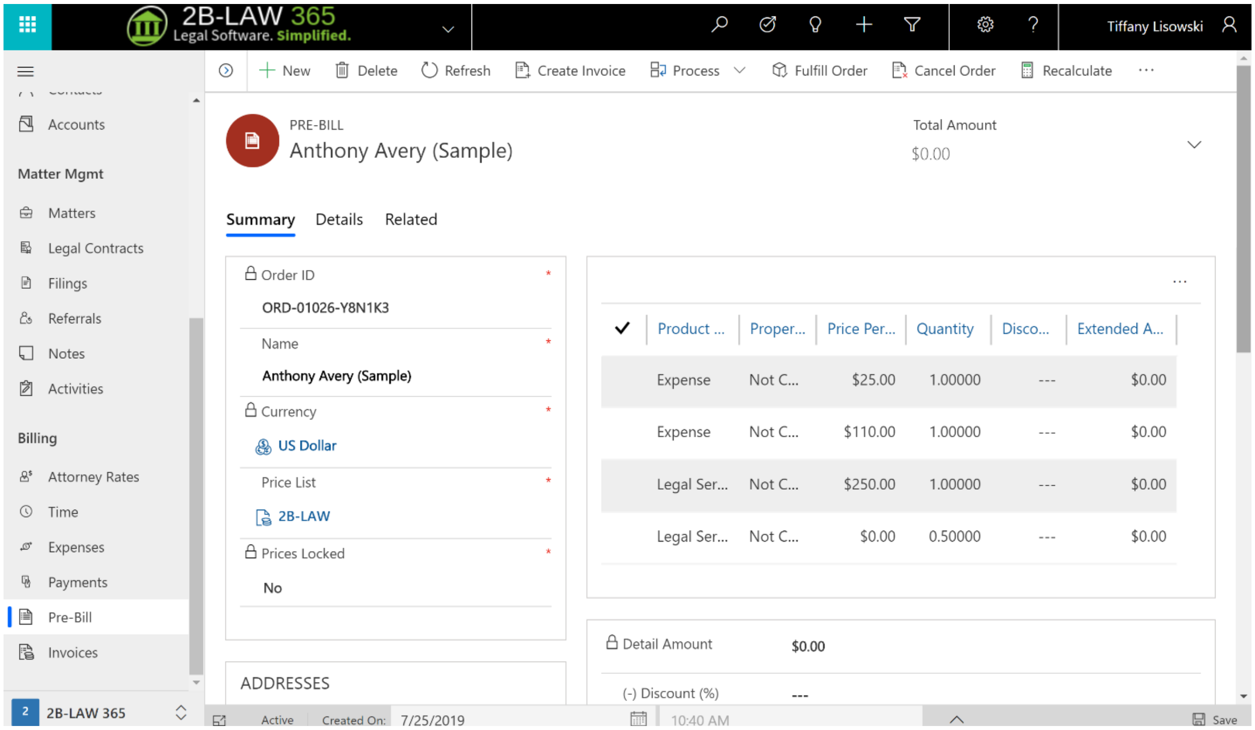
2. **Double-click on the Matter to open Matter record.**



3. **Scroll down Matter form to find the "Active Pre-Bills" section.**



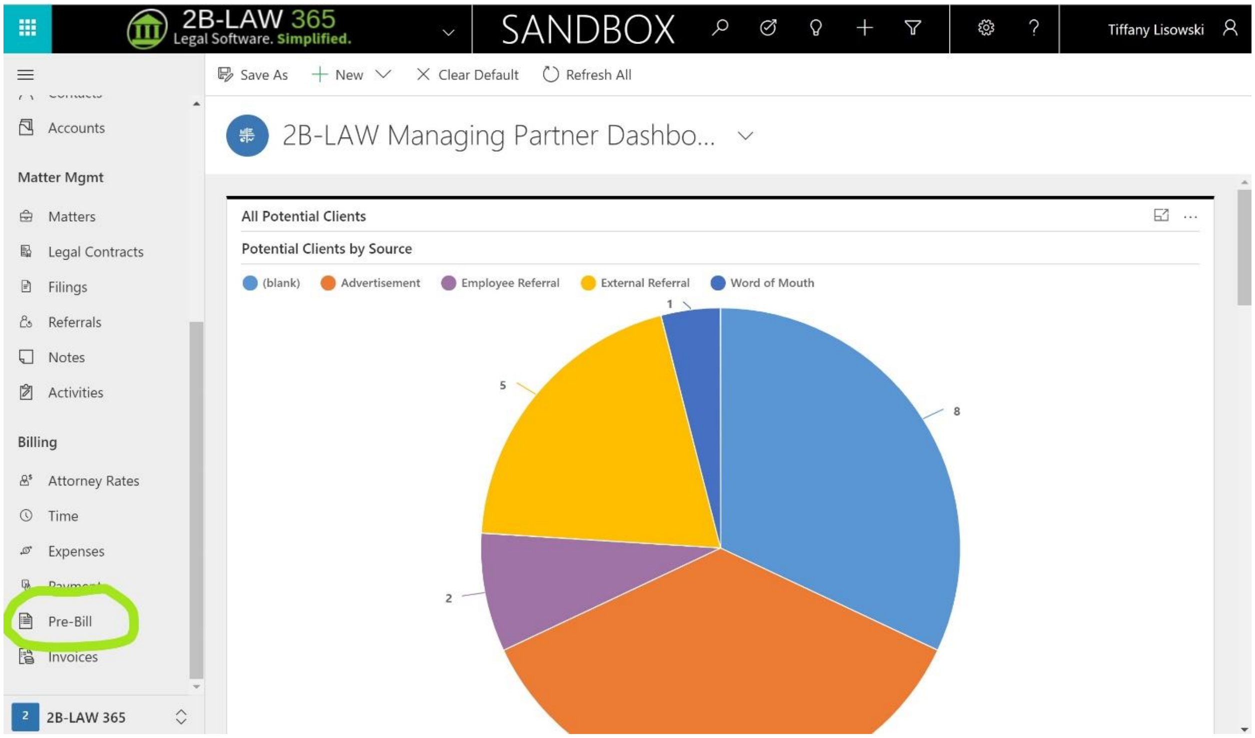
4. **Double-click on the Pre-Bill that needs to be viewed. The Pre-Bill form will open. Edits can be made to the Pre-Bill.**



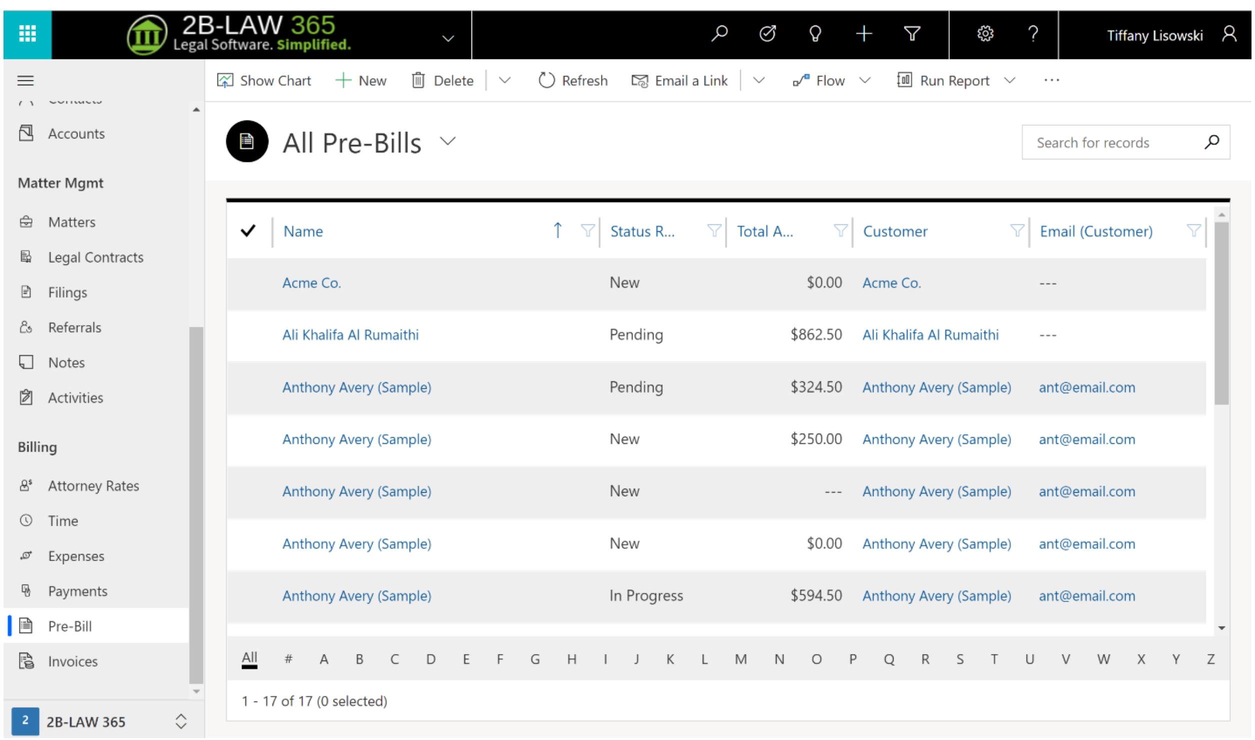
5. **NOTE: The most recent Pre-Bill can be viewed by clicking the link located in the Billing section of the Matter form under "Last Pre-Bill".**

Creating Invoices

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

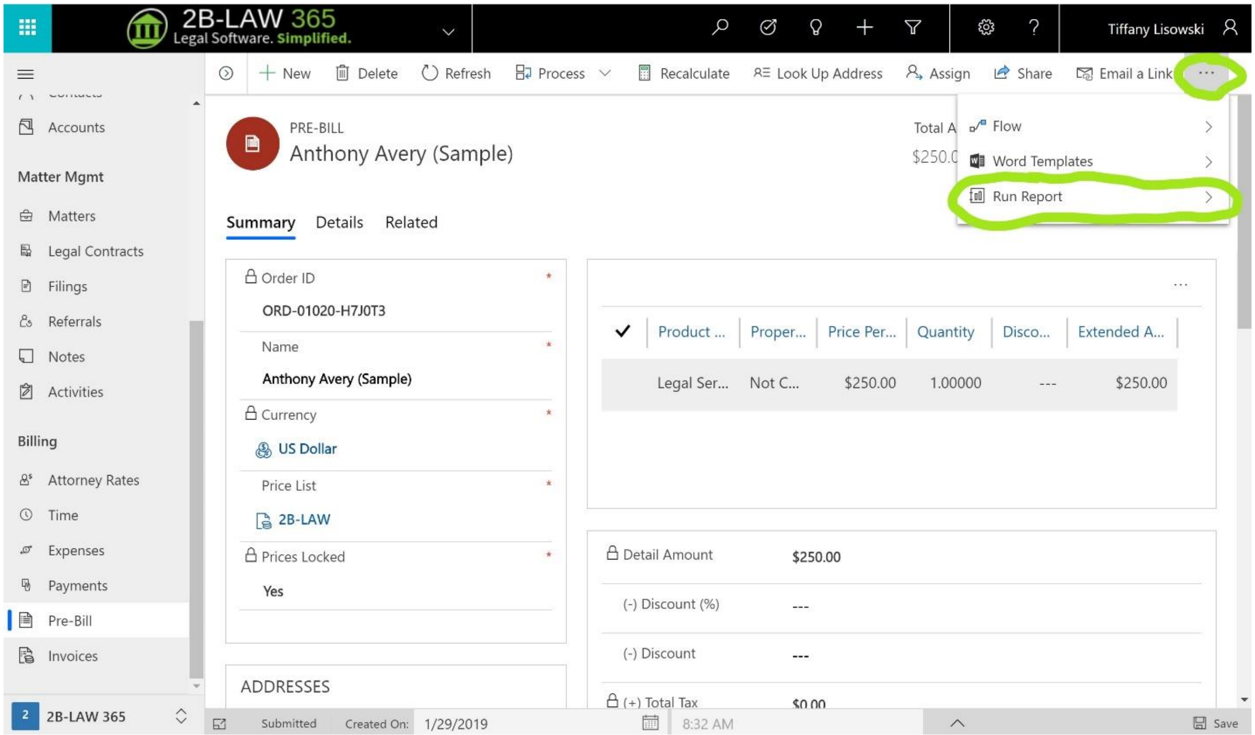


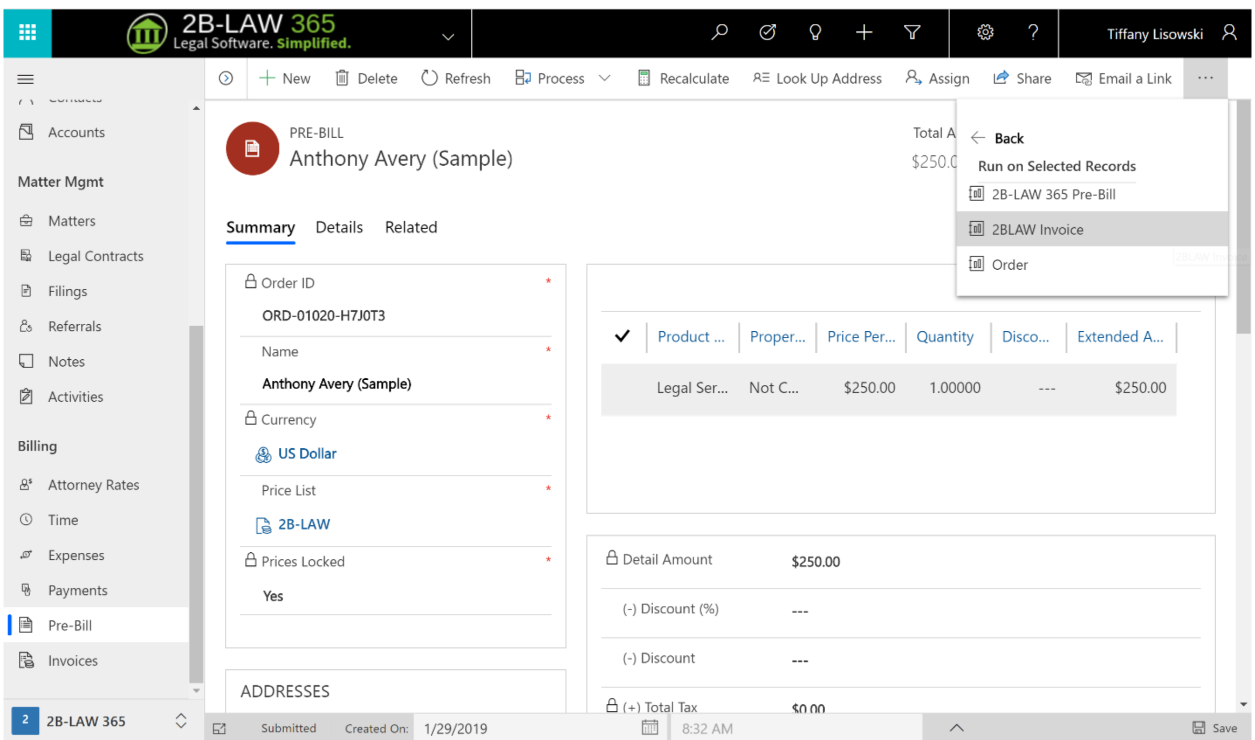
2. **Within Pre-Bill, the default view shows all Active Pre-Bills. Double-click on the Pre-Bill needed.**



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

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





4. **A customizable Invoice will be created.**

File

Edit Filter

1 of 1

100%

Invoice

Client: Anthony Avery (Sample)

Re: Anthony Avery (Sample)

Invoice Amount: $250.00

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

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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 mobiles sales, asset tracking and event tracking. We are a Microsoft Partner with competencies in Microsoft Mobility Solutions, Microsoft Business Solutions and ISV/Software Solutions.

DO YOU NEED TO CONTACT US?

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