



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

USER GUIDE

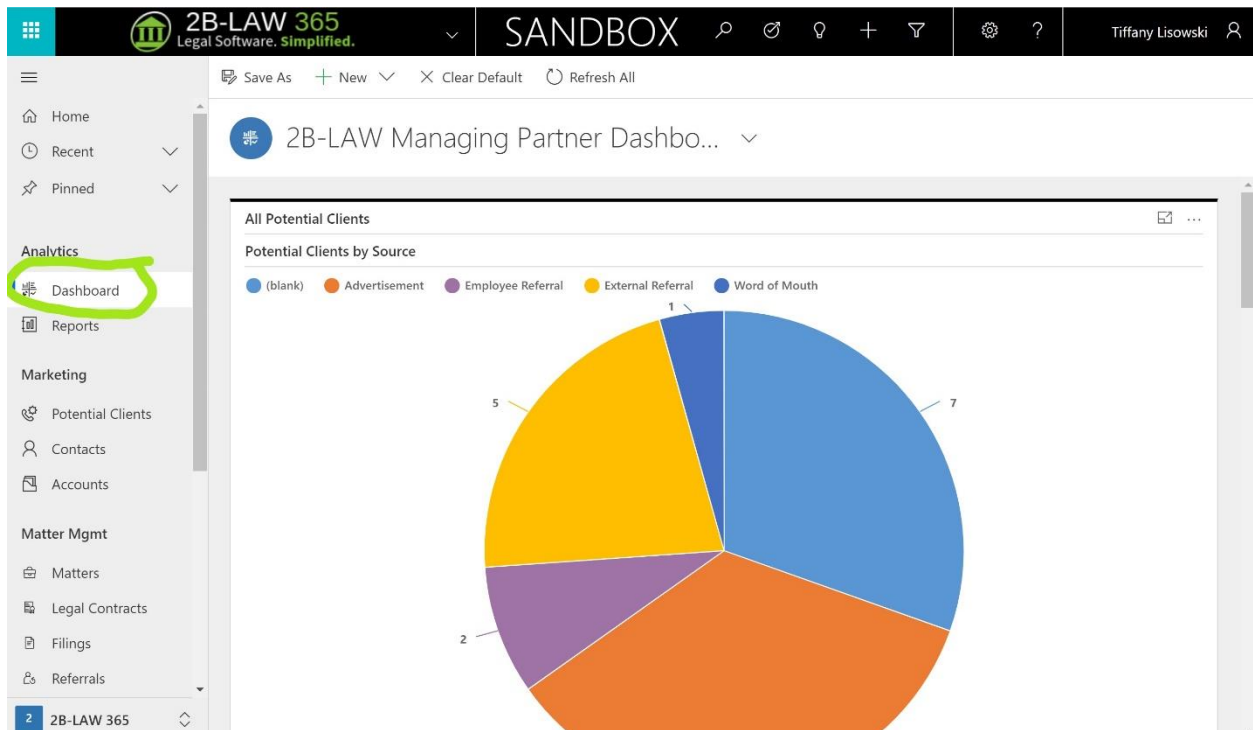
for Microsoft Dynamics 365 Unified
Interface

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DASHBOARDS - 2B-LAW 365

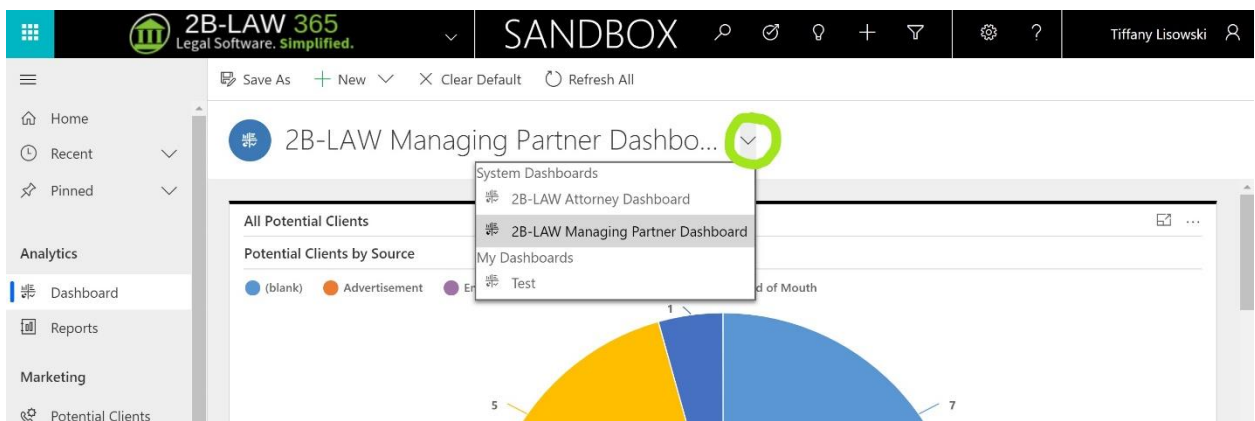
Several custom Dashboards are available within 2B-LAW. For more information, see [Create and Edit Dashboards](#).

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”.



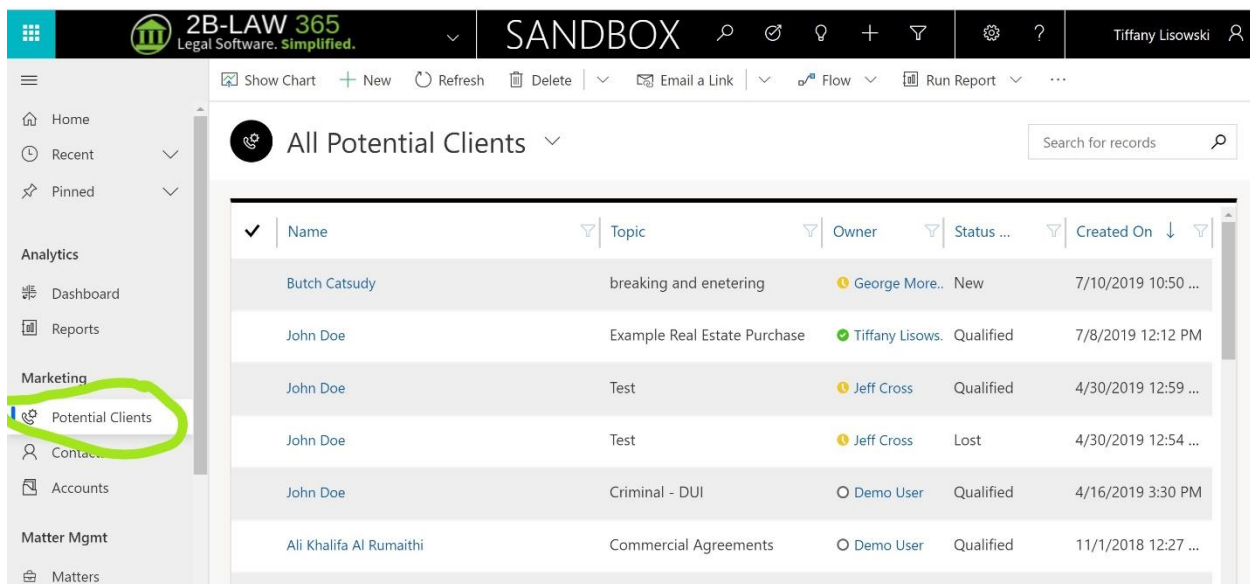
NAVIGATING THE MARKETING SECTION OF 2B-LAW 365

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 displays the 2B-LAW 365 interface. The top navigation bar includes the 2B-LAW 365 logo, a 'SANDBOX' label, and a user profile for Tiffany Lisowski. The left sidebar shows a navigation menu with 'Marketing' and 'Potential Clients' highlighted. The main content area shows 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. Choose +New to add a new Potential Client.

<

3. Add information on Potential Client.

2B-LAW 365 Legal Software. Simplified.		SANDBOX		Tiffany Lisowski			
+ New Convert to Matter Convert to Referral Delete Refresh Process Disqualify							
<div> <div>JD</div> <div>POTENTIAL CLIENT</div> <div>John Doe</div> </div> <div>Lead Source ---</div>							
<div>Lead to Opportunity Sale... Active for 21 hours</div> <div>Qualify (21 Hrs) Develop Propose Close</div>							
Summary Internal Review Related							
<div>CONTACT</div> <div>Case Subject * Chapter 13 Petition</div> <div>First Name * John</div> <div>Last Name * Doe</div> <div>Street 1 123 Main Street</div> <div>Street 2 ---</div> <div>Street 3 ---</div> <div>City Anytown</div>		<div>Timeline</div> <div>Enter a note...</div> <div>YESTERDAY</div> <div>Auto-post on wall John Doe - Yesterday 8:53 AM</div> <div>Tiffany Lisowski created John Doe</div> <div>Like Reply</div>					

- 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".

2B-LAW 365
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POTENTIAL CLIENT
John Doe

Lead Source

Lead to Opportunity Sale...
Active for 21 hours

Qualify (21 Hrs) Develop Propose Close

Summary Internal Review Related

Internal Rating

Evaluate Fit	Yes
Rating	Warm
Priority	Default Value

Referral

Refer Out?	---
Referred To	---
Referral Date	---
Resulting Referral	---

- 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.

2B-LAW 365
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POTENTIAL CLIENT
John Doe

Lead Source
--Select--

Advertisement
Employee Referral
External Referral
Partner
Public Relations
Seminar
Trade Show
Web
Word of Mouth
Other

Summary Internal Review Related

CONTACT

Case Subject	Chapter 13 Petition
First Name	John
Last Name	Doe
Street 1	123 Main Street

Timeline

Enter a note...

YESTERDAY

Auto-post on wall John Doe - Yes
Tiffany Lisowski created John Doe

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

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POTENTIAL CLIENT
New Potential Client

Lead Source

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

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 Legal Software interface. The top navigation bar includes the logo, user name 'Tiffany Lisowski', and various action icons. The left sidebar contains navigation links for Home, Recent, Pinned, Analytics, Dashboard, Reports, Marketing, and Potential Clients. The main content area shows a client profile for 'John Doe' with a status of 'Lead to Opportunity Sale... Active for 21 hours'. A progress bar indicates stages: Qualify (21 Hrs), Develop, Propose, and Close. Below the progress bar, there are tabs for Summary, Internal Review, and Related. The 'Summary' tab is active, showing a table with the following data:

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

The 'Client Type' field and its value 'Individual' are highlighted with a green oval.

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

The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes the 2B-LAW 365 logo, a 'SANDBOX' tab, and a user profile for Tiffany Lisowski. The left sidebar contains a menu with 'Home', 'Recent', 'Pinned', 'Analytics', 'Marketing', 'Matter Mgmt', and 'Matters'. The 'Marketing' menu is expanded, and 'Potential Clients' is highlighted. The main content area displays a table titled 'All Potential Clients' with columns for Name, Topic, Owner, Status, and Created On. The table lists several potential clients, including Butch Catsudy, John Doe, and Ali Khalifa Al Rumaithi.

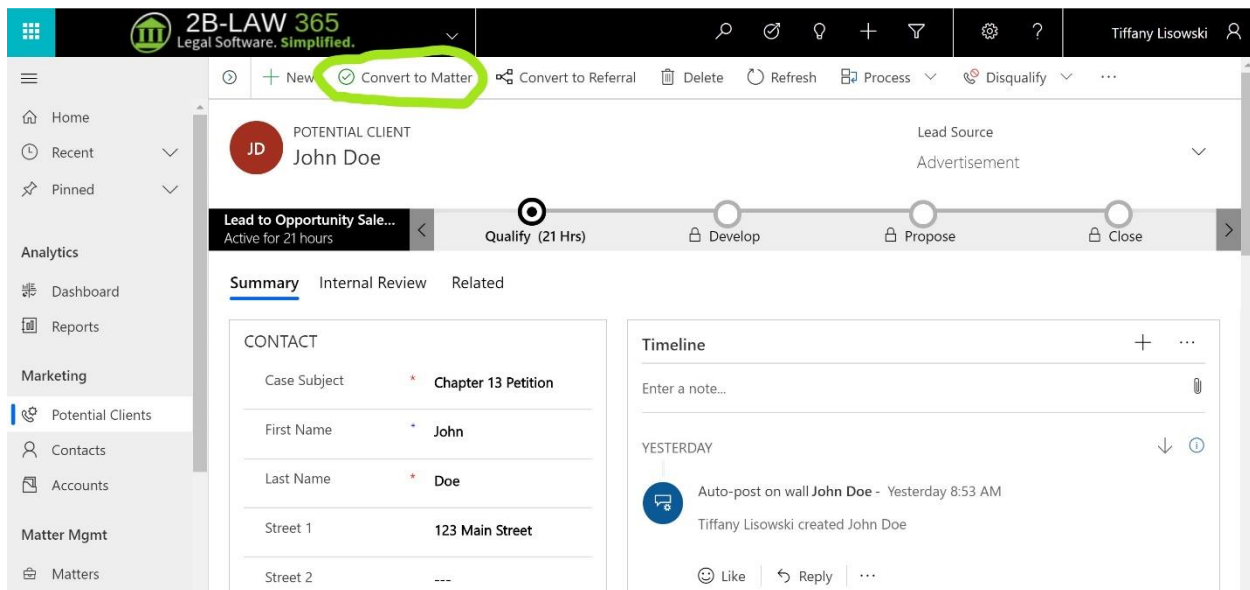
Name	Topic	Owner	Status	Created On
Butch Catsudy	breaking and enetering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 12:12 PM
John Doe	Test	Jeff Cross	Qualified	4/30/2019 12:59 ...
John Doe	Test	Jeff Cross	Lost	4/30/2019 12:54 ...
John 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.

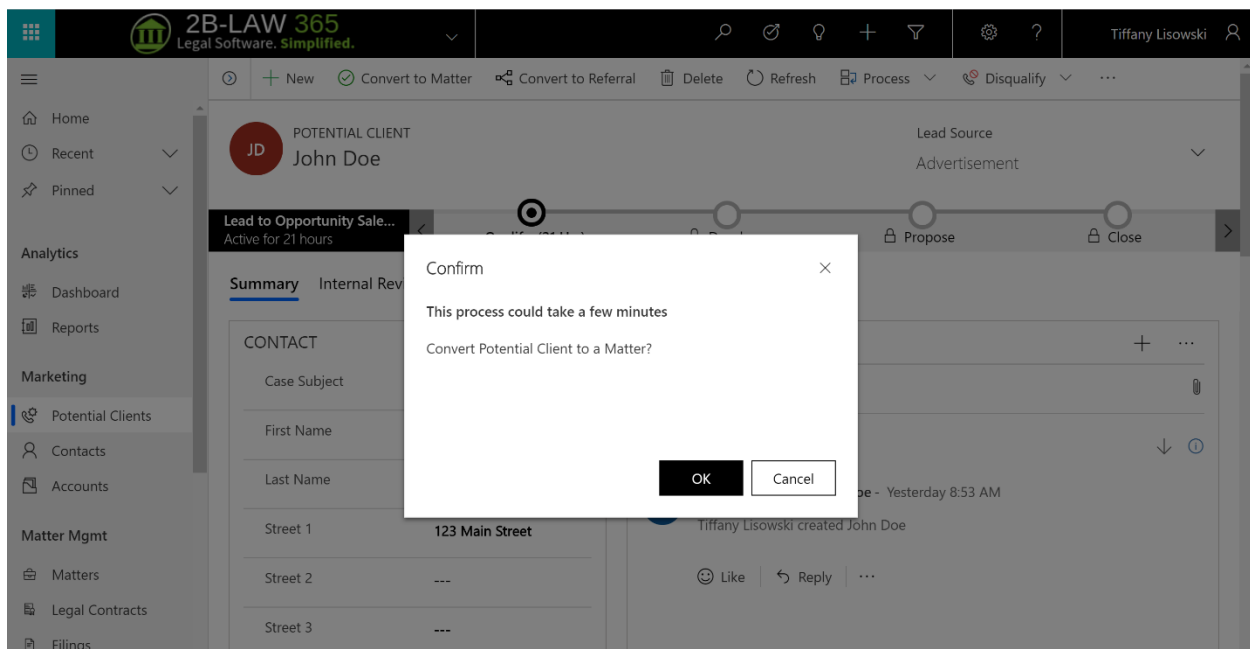
The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes the 2B-LAW 365 logo, a 'SANDBOX' tab, and a user profile for Tiffany Lisowski. The left sidebar contains a menu with 'Home', 'Recent', 'Pinned', 'Analytics', 'Marketing', 'Matter Mgmt', and 'Matters'. The 'Marketing' menu is expanded, and 'Potential Clients' is highlighted. The main content area displays a table titled 'All Potential Clients' with columns for Name, Topic, Owner, Status, and Created On. The table lists several potential clients, including John Doe, Butch Catsudy, and Ali Khalifa Al Rumaithi. The 'John Doe' entry is selected, and the 'Search for records' option is visible.

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 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 Legal Software interface. The top navigation bar includes the logo, user name 'Tiffany Lisowski', and various action buttons like 'New', 'Deactivate', 'Delete', 'Documents', 'Create Pre-Bill', and 'Refresh'. The left sidebar contains a menu with categories: Home, Recent, Pinned, Analytics (Dashboard, Reports), Marketing (Potential Clients, Contacts, Accounts), and Matter Mgmt (Matters, Legal Contracts, Filings, Referrals). The main content area shows the details for a matter named 'John Doe'. The 'Summary' tab is active, displaying fields such as 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, the 'CASE INFORMATION' section shows Client (John Doe), Name (John Doe), and Matter Number (MAT-190724-01032). A right-hand sidebar contains a 'Close' button and a '+ ...' button. A small tooltip at the bottom right of the main content area reads 'Sorted in descending order. Select to change sort order'.

2B-LAW 365 Legal Software. Simplified.

2B-LAW 365

Tiffany Lisowski

+ New Deactivate Delete Documents Create Pre-Bill Refresh ...

John Doe

Summary Connections Docket Trust Ledger Outcome Related

Status * Active

Won or Lost ---

Matter Number MAT-190724-01032

Modified On 7/24/2019 6:45 AM

Modified By Tiffany Lisowski

Sorted in descending order. Select to change sort order

CASE INFORMATION

Client * John Doe

Name John Doe

Matter Number MAT-190724-01032

Assigned Attorney * Tiffany Lisowski

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 2B-LAW 365 logo, a 'SANDBOX' tab, and a user profile for Tiffany Lisowski. The left sidebar contains a menu with 'Marketing' highlighted by a green circle. The main content area displays a table titled 'All Potential Clients' with columns for Name, Topic, Owner, Status, and Created On. The table lists several potential clients, including Butch Catsudy, John Doe, and Ali Khalifa Al Rumaithi.

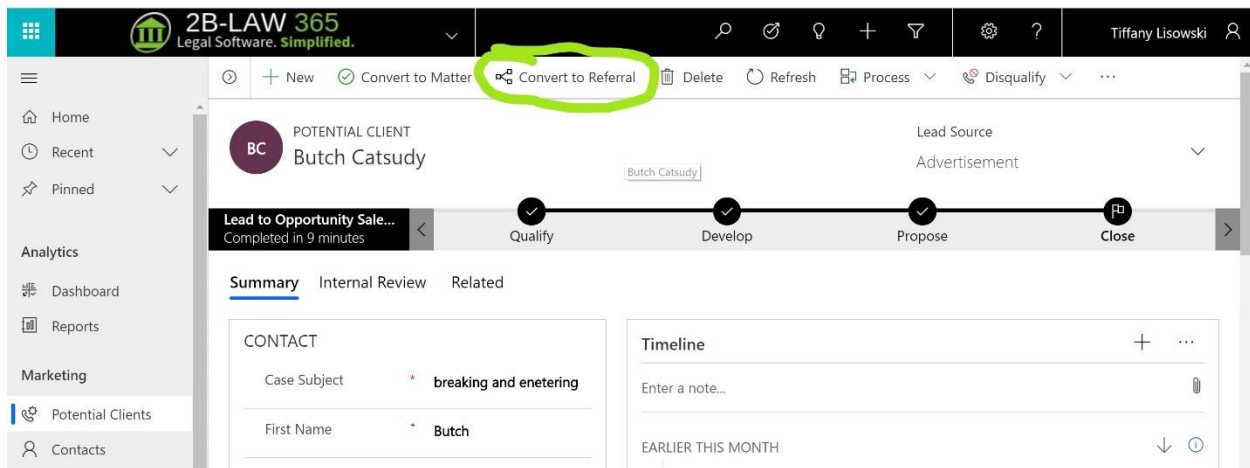
Name	Topic	Owner	Status	Created On
Butch Catsudy	breaking and entering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 12:12 PM
John Doe	Test	Jeff Cross	Qualified	4/30/2019 12:59 ...
John Doe	Test	Jeff Cross	Lost	4/30/2019 12:54 ...
John 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.

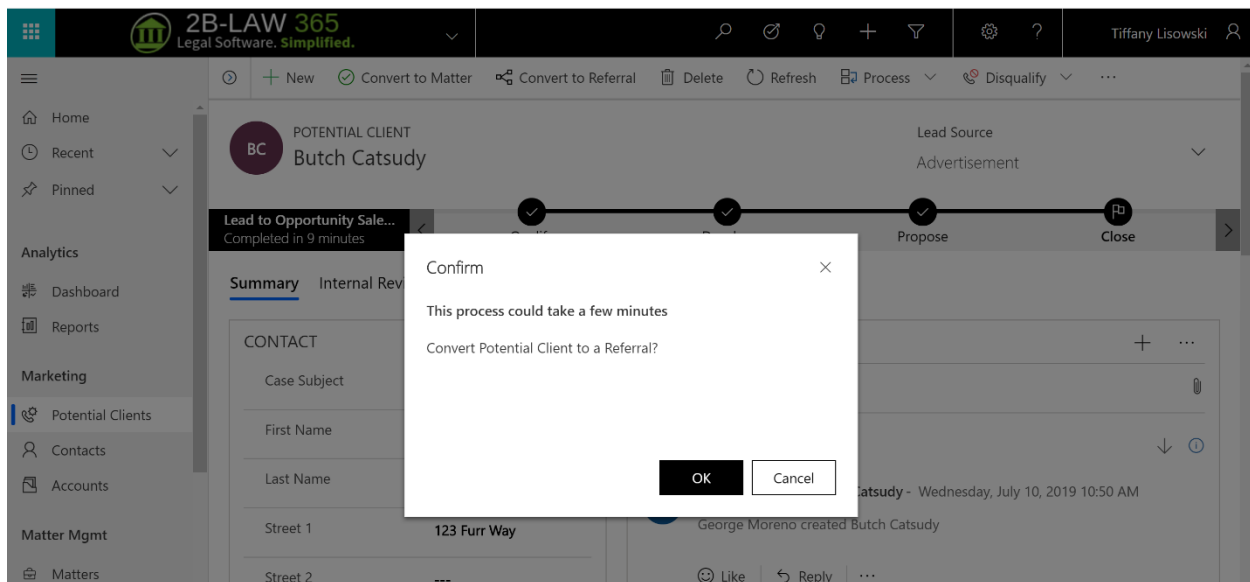
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Name	Topic	Owner	Status	Created On
John Doe	Chapter 13 Petition	Tiffany Lisows.	New	7/23/2019 8:53 ...
Butch Catsudy	breaking and entering	George More..	New	7/10/2019 10:50 ...
John Doe	Example Real Estate Purchase	Tiffany Lisows.	Qualified	7/8/2019 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.



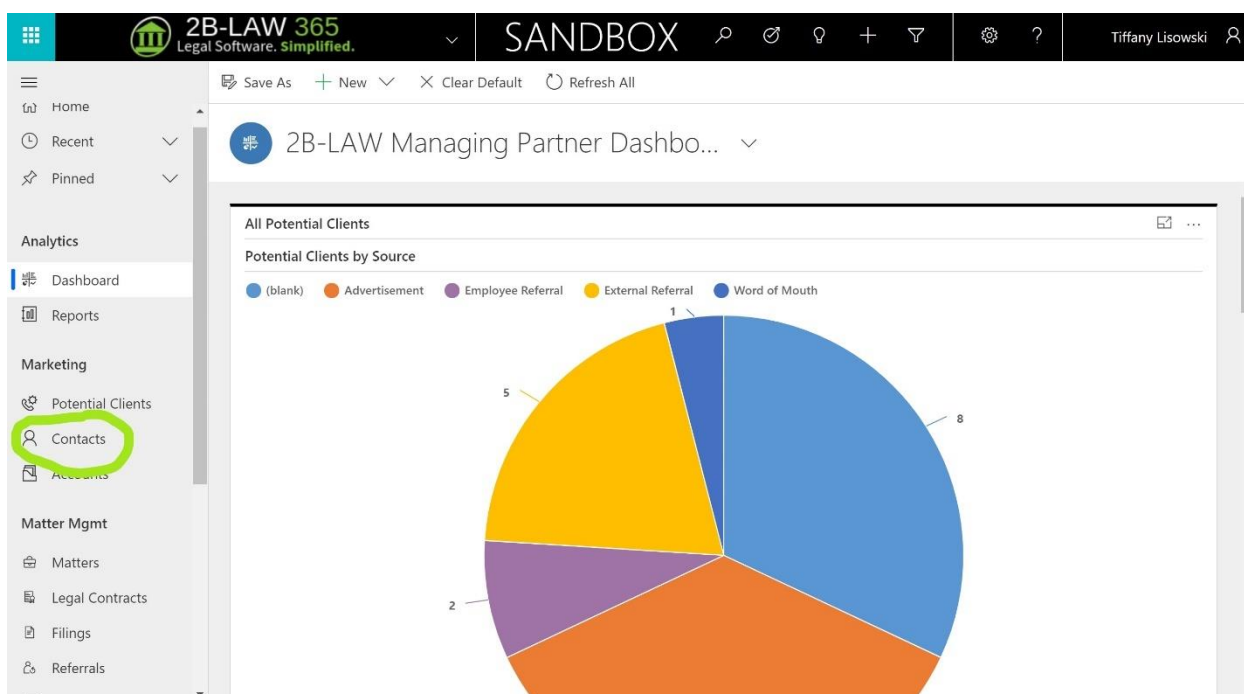
5. A “Referral” record has been created for the Potential Client. *If the record did not automatically pop-up, please check your pop-up blocker settings.* Here, all the pertinent referral information can be entered.

The screenshot displays the 2B-LAW 365 web application. The top navigation bar includes the logo, user name "Tiffany Lisowski", and various action icons like New, Deactivate, Delete, Refresh, Assign, Share, and Email a Link. A left sidebar provides navigation options categorized by Home, Analytics, Marketing, Potential Clients, Contacts, Accounts, Matter Mgmt, Matters, Legal Contracts, and Filings. The main content area shows a "REFERRAL" record for "Butch Catsudy - Criminal". Below the title are tabs for "General", "Outcome", and "Related". The "General" tab is active, displaying fields for Status Reason (Pending), Status (Active), Created On (7/25/2019 at 8:42 AM), Created By (Tiffany Lisow...), and Modified On (7/25/2019). A "Timeline" section on the right indicates 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
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Home Recent Pinned

Analytics Dashboard Reports

Marketing Potential Clients

Contacts Accounts

Matter Mgmt Matters Legal Contracts Filings Referrals

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.

Home Recent Pinned

Analytics Dashboard Reports

Marketing Potential Clients

Contacts Accounts

Matter Mgmt Matters Legal Contracts Filings Referrals

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

Tiffany Lis

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

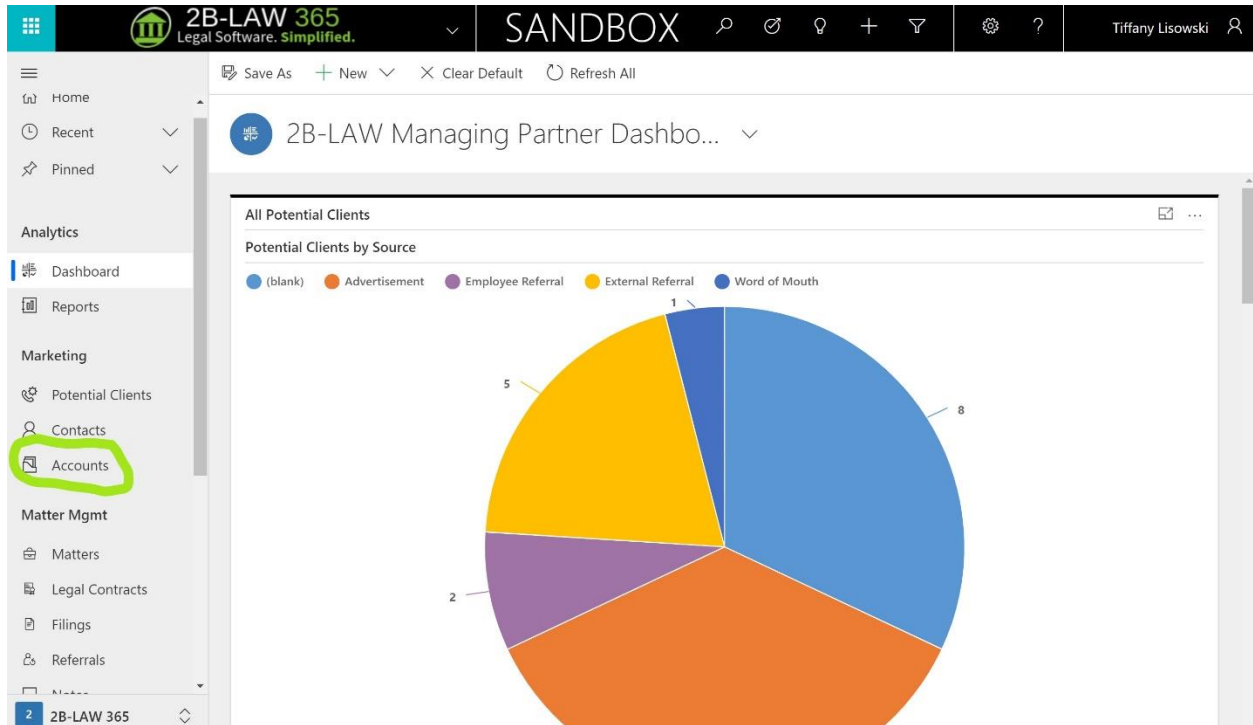
Timeline

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.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

Home Recent Pinned

Analytics Dashboard Reports

Marketing Potential Clients Contacts Accounts

Matter Mgmt Matters Legal Contracts Filings Referrals

2B-LAW 365

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

Home Recent Pinned

Analytics Dashboard Reports

Marketing Potential Clients Contacts Accounts

Matter Mgmt Matters Legal Contracts Filings Referrals

2B-LAW 365

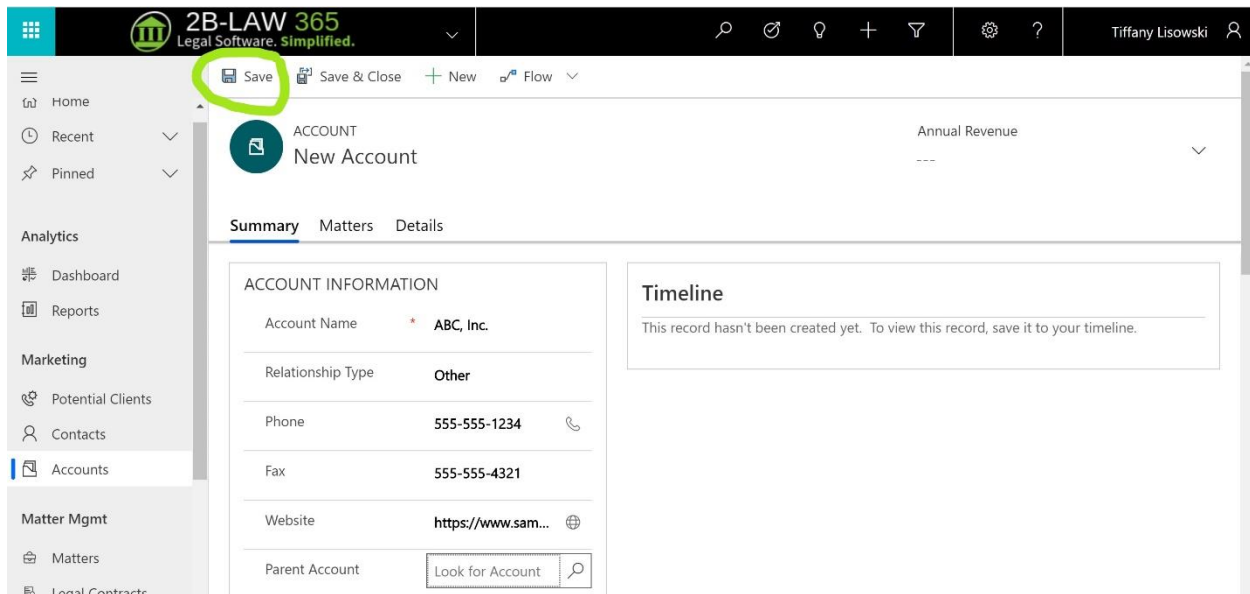
Show Chart + New Delete Refresh Email a Link Flow Run Report

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.



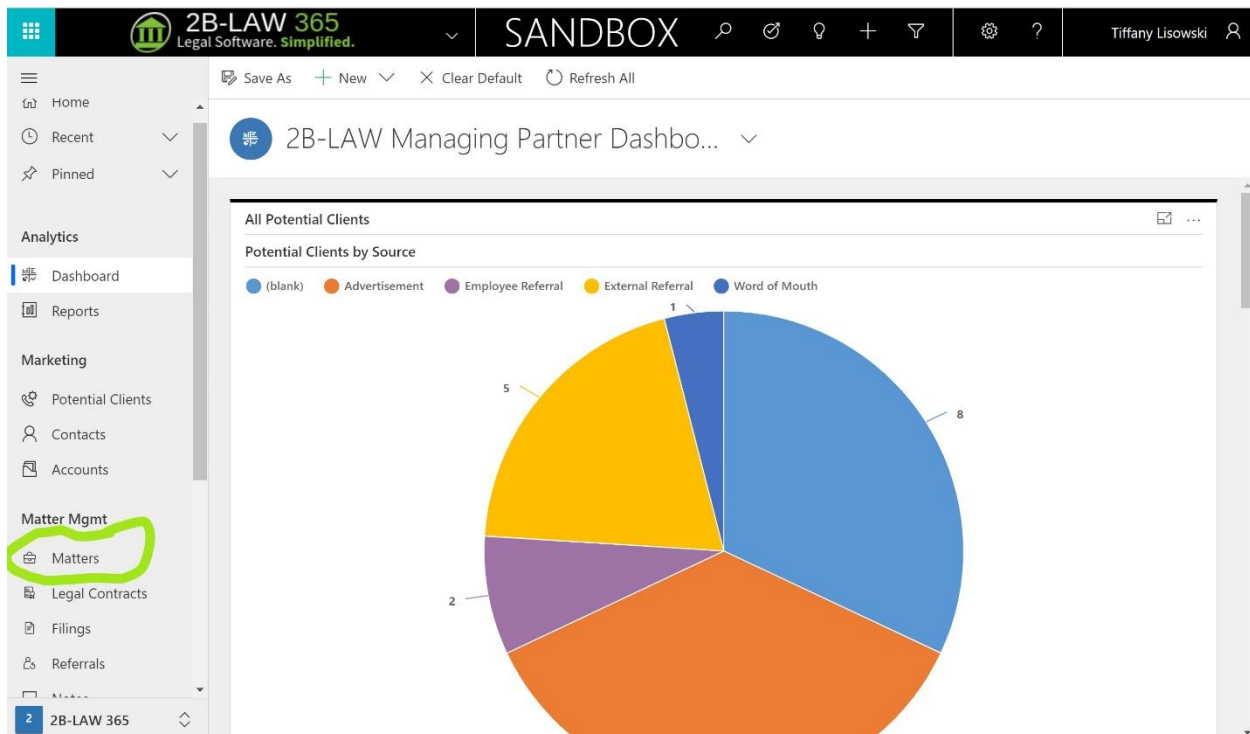
NAVIGATING THE MATTER MGMT SECTION OF 2B-LAW

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.

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)

Analytics

- Dashboard
- Reports

Marketing

- Potential Clients
- Contacts
- Accounts

Matter Mgmt

- Matters
- Legal Contracts
- Filings
- Referrals

2B-LAW 365

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	
	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 Tiffany Roberts Created On 7/25/2019 8:57 AM

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

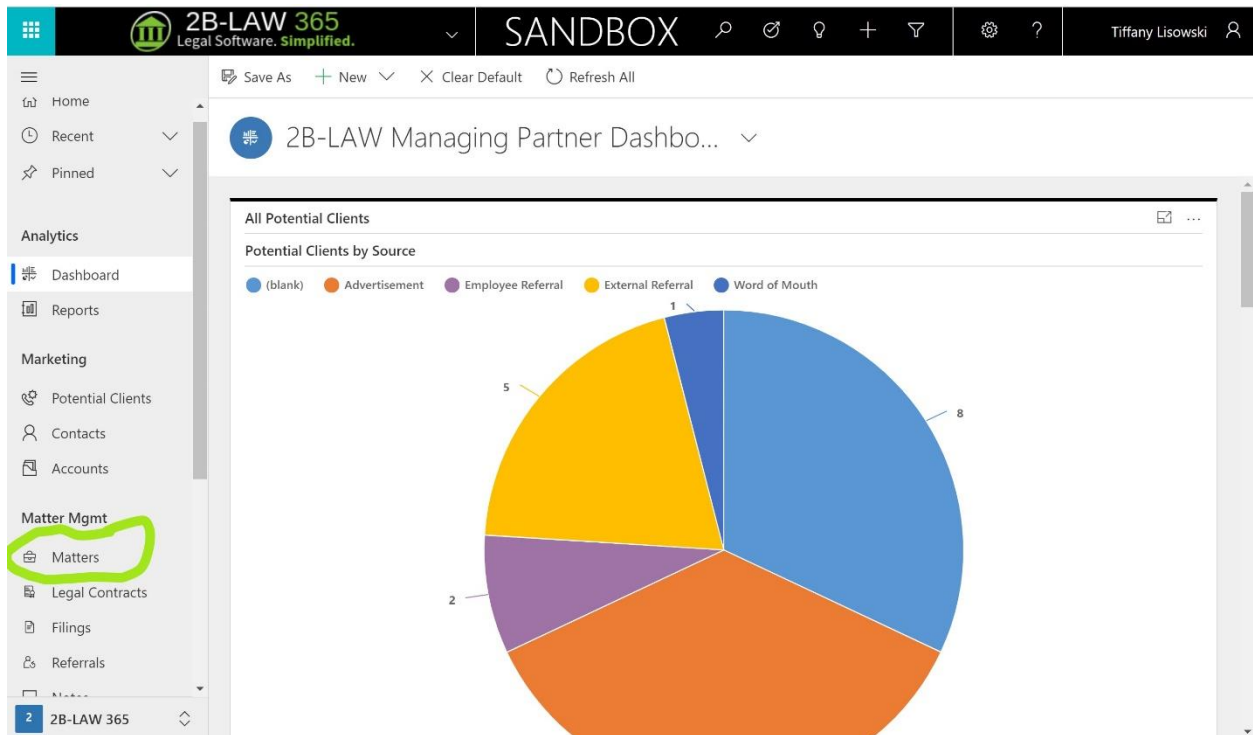
2B-LAW 365 Active Matter Number: MAT-190725-01034 Save

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt **Matters** Legal Contracts Filings Referrals

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. Click Documents.

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt **Matters** Legal Contracts Filings Referrals

+ 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 AC Acme Co.

Acme Co.

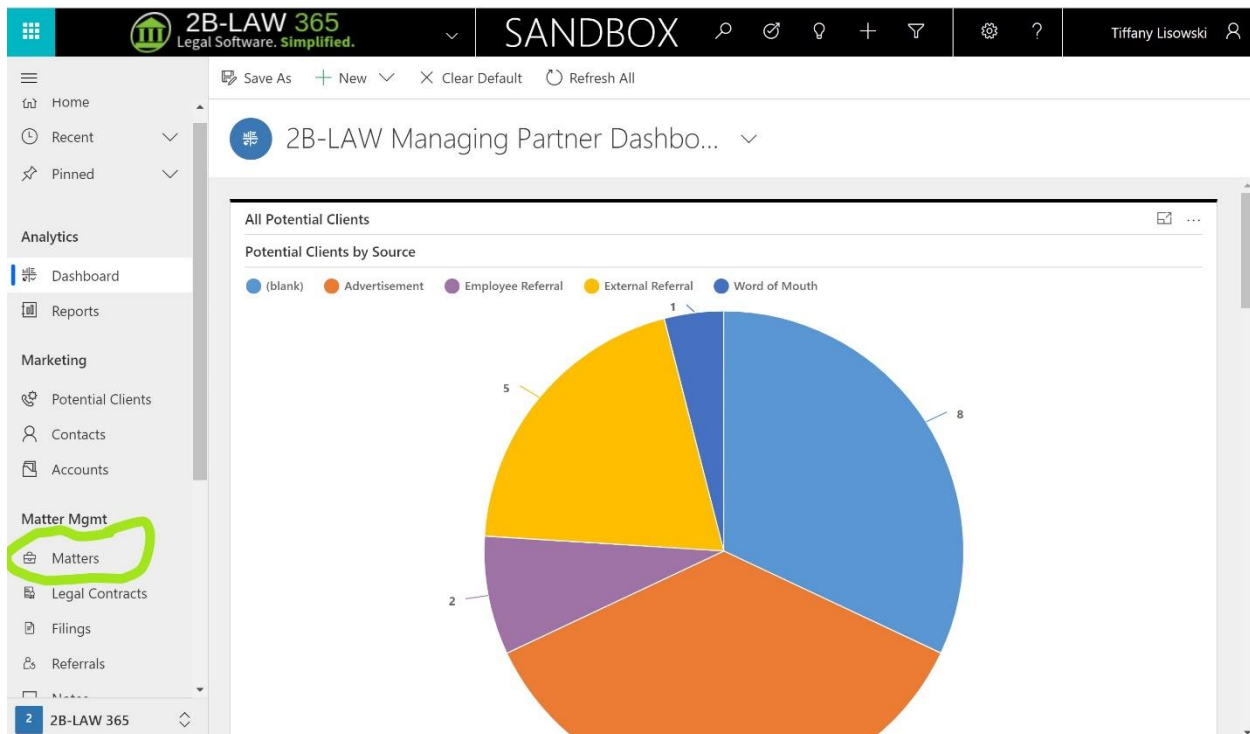
4. In this screen, all documents stored in SharePoint are visible. New documents can be uploaded, folders created, etc. For more information, see [SharePoint](#).

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: Home, Recent, Pinned, Analytics (Dashboard, Reports), Marketing (Potential Clients, Contacts, Accounts), and Matter Mgmt (Matters, Legal Contracts). The main content area shows the 'Documents' section for a matter named 'Acme Co.'. It includes a 'Created On' date of 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: 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-_2FB82F7A...'. 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.

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)

Analytics

- Dashboard
- Reports

Marketing

- Potential Clients
- Contacts
- Accounts

Matter Mgmt

- Matters
- Legal Contracts
- Filings
- Referrals

2B-LAW 365

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.

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings

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

Summary Connections **Docket** Trust Ledger Outcome Related

+ Add New Filing Documents

✓	Matter	Type	Date Fil...	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.

2B-LAW 365 Legal Software. Simplified. Save Save & Close New Flow Tiffany Lisowski

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings Referrals

FIILING New Filing Owner Tiffany Lisowski

General

Name Certificate of Service

Matter Anthony Avery (Sample)

Type Other

Date Filed 7/24/2019

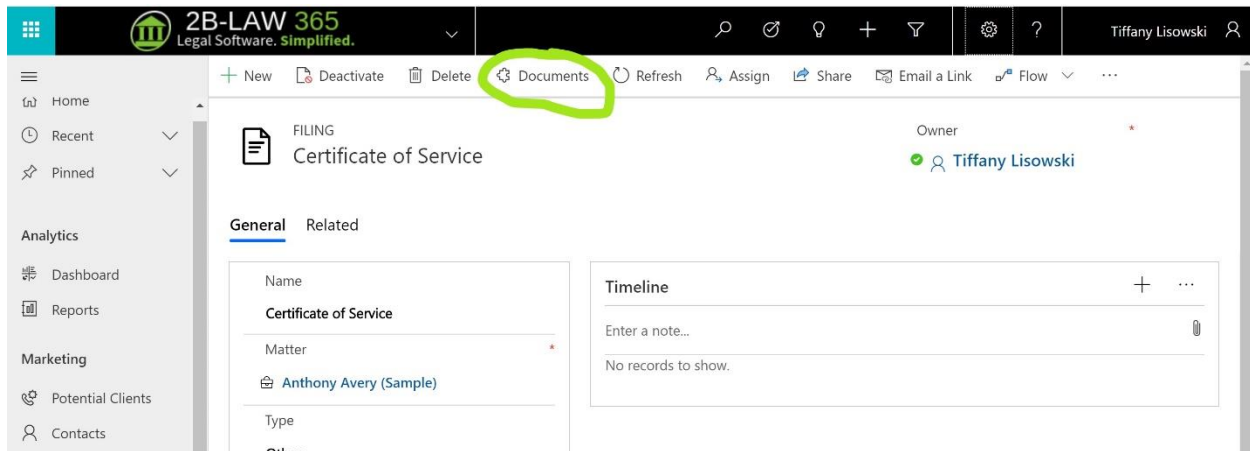
Filed By Demo User

Description

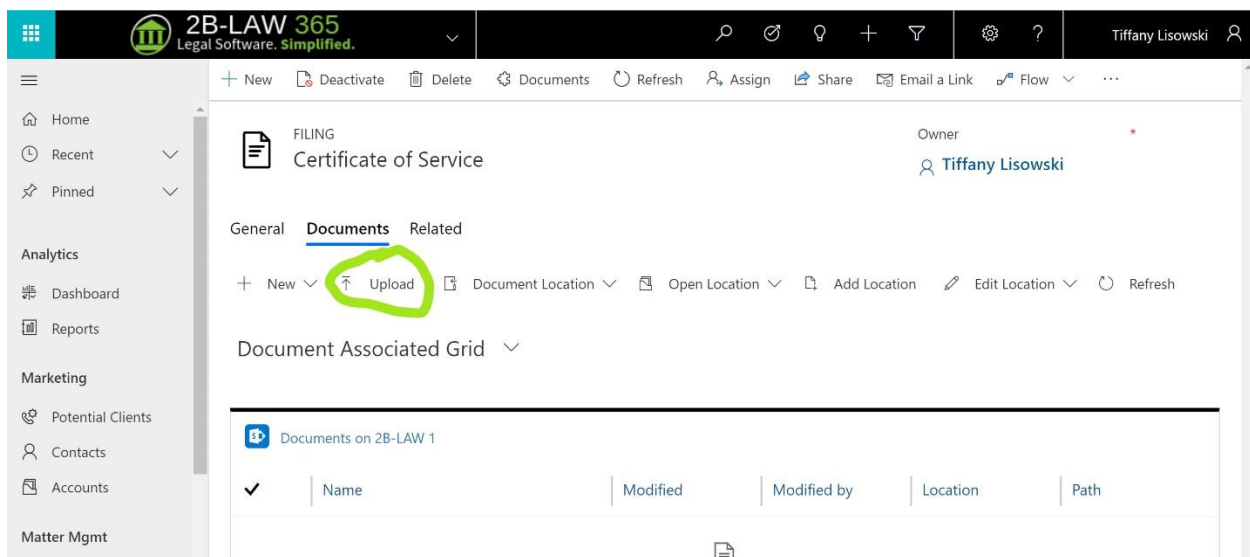
Timeline

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.



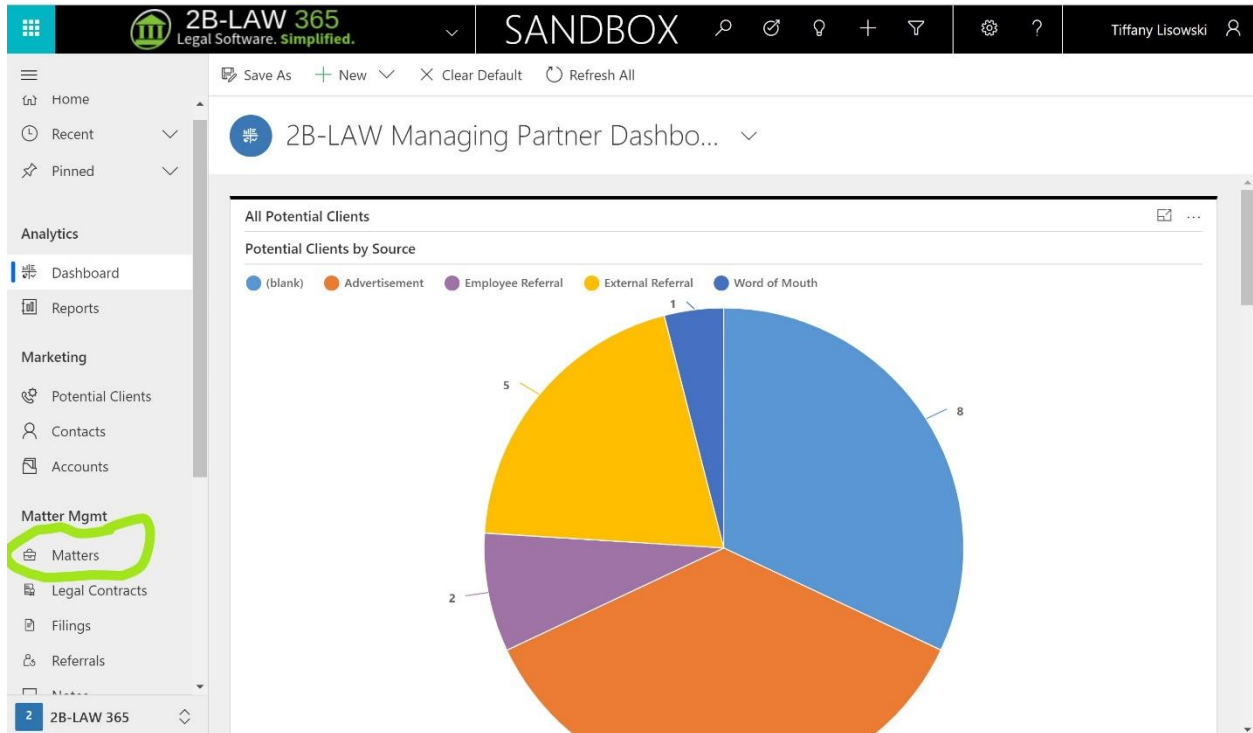
6. Next, click “Upload” and select the appropriate documents.



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.

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)

Analytics

- Dashboard
- Reports

Marketing

- Potential Clients
- Contacts
- Accounts

Matter Mgmt

- Matters
- Legal Contracts
- Filings
- Referrals

2B-LAW 365

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

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings Referrals

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

TIME

+ Add New Time Refresh

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

1 - 4 of 10 (0 selected)

EXPENSES

+ Add New Expense Refresh

2B-LAW 365 Active Matter Number: MAT-180808-01014 Save

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.

2B-LAW 365 Legal Software. Simplified. SANDBOX

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

TIME

Quick Create: Time

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

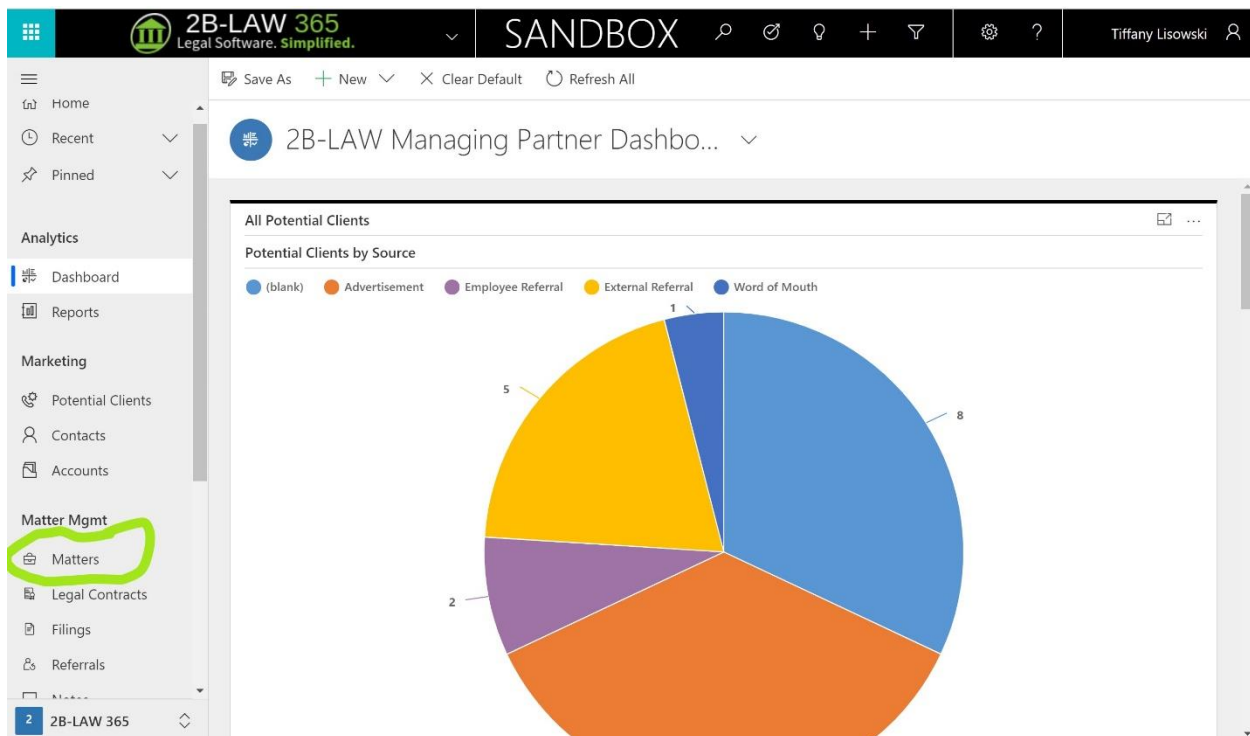
Save and Close Cancel

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt **Matters** Legal Contracts Filings Referrals

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt **Matters** Legal Contracts Filings Referrals

+ 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)

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.

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings Referrals

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

1 - 4 of 11 (0 selected)

EXPENSES

Expense D...	Expense T...	Paid To	Amount
11/1/2018	Rental Car	---	
9/19/2018	Dining	---	
9/18/2018	Gasoline	---	
9/10/2018	Expert Witness	---	

PAYMENTS

Receipt Number	Payment Da...	Amount...	Matter
REC-181101-01005	11/1/2018	\$1,000.00	Anthony

Quick Create: Expense

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

OWNER

Initials **TR**

Owner * [Tiffany Lisowski](#)

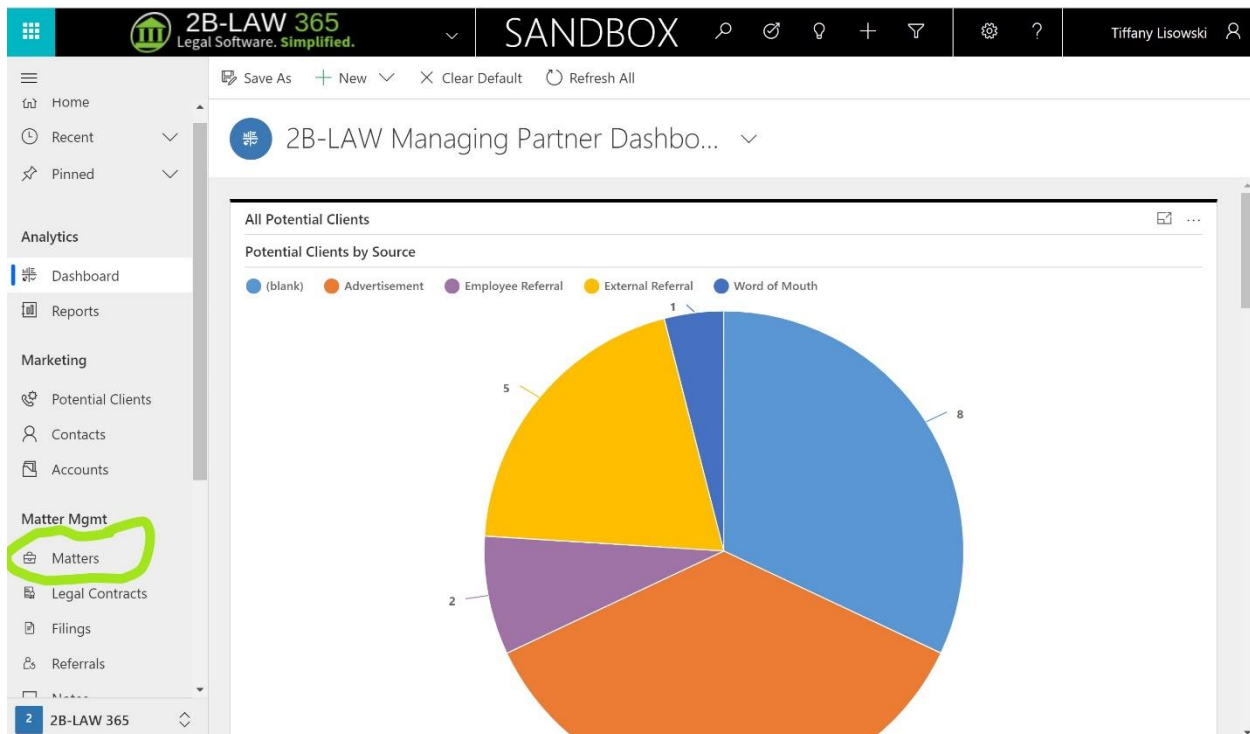
Save and Close **Cancel**

- 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.

- 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 the Matter screen to find Payments section and Click +.

2B-LAW 365 Legal Software. Simplified. SANDBOX

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

1 - 4 of 5 (0 selected)

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

2B-LAW 365 Legal Software. Simplified. SANDBOX

Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

1 - 4 of 5 (0 selected)

PAYMENTS

✓ Receipt Number Payment Da... Amount... Matter

REC-181101-01005 11/1/2018 \$1,000.00 Anthony

ACTIVE PRE-BILLS

✓ Modified On ↓ Total Amo... ↑ Name

4/3/2019 2:17 PM \$250.00 Anthony Avery (Sample)

4/3/2019 2:14 PM \$0.00 Anthony Avery (Sample)

Quick Create: Payment

DETAILS

Matter * Anthony Avery (Sample)

Payment From Anthony Avery (Sample)

Payment Date 7/12/2019

PAYMENT

Payment Method Money Order

Amount Paid \$1,200.00

Name ---

TOTALS

Previous Balance

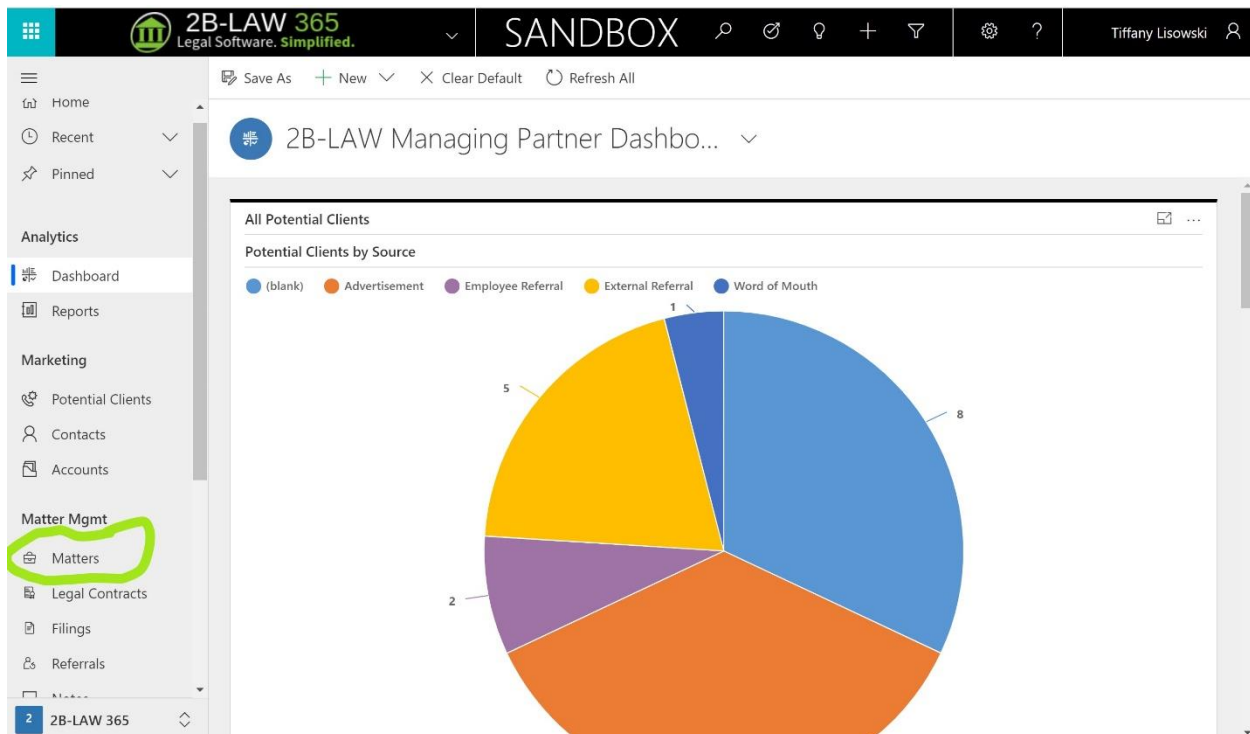
New Balance ---

Save and Close Cancel

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.

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)

Analytics

- Dashboard
- Reports

Marketing

- Potential Clients
- Contacts
- Accounts

Matter Mgmt

- Matters
- Legal Contracts
- Filings
- Referrals

2B-LAW 365

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

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings Referrals

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt Matters Legal Contracts Filings Referrals

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.

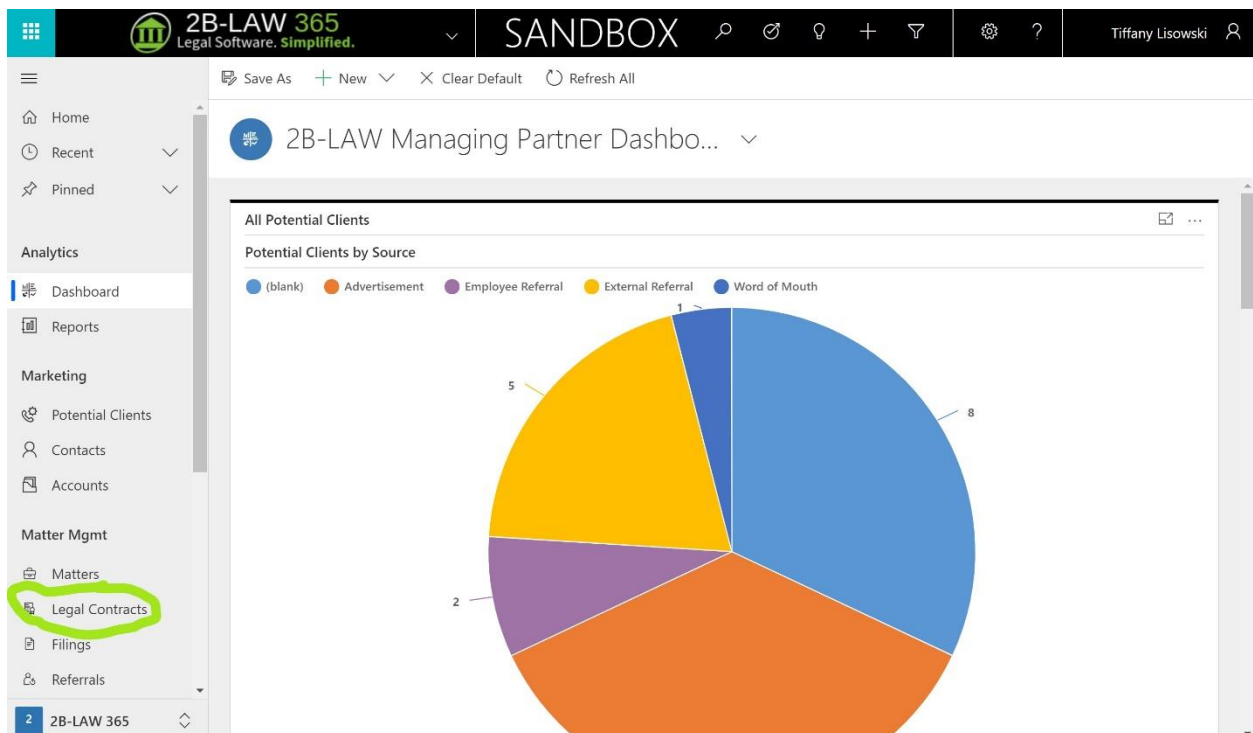
2B-LAW 365 Active unsaved changes Save

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.

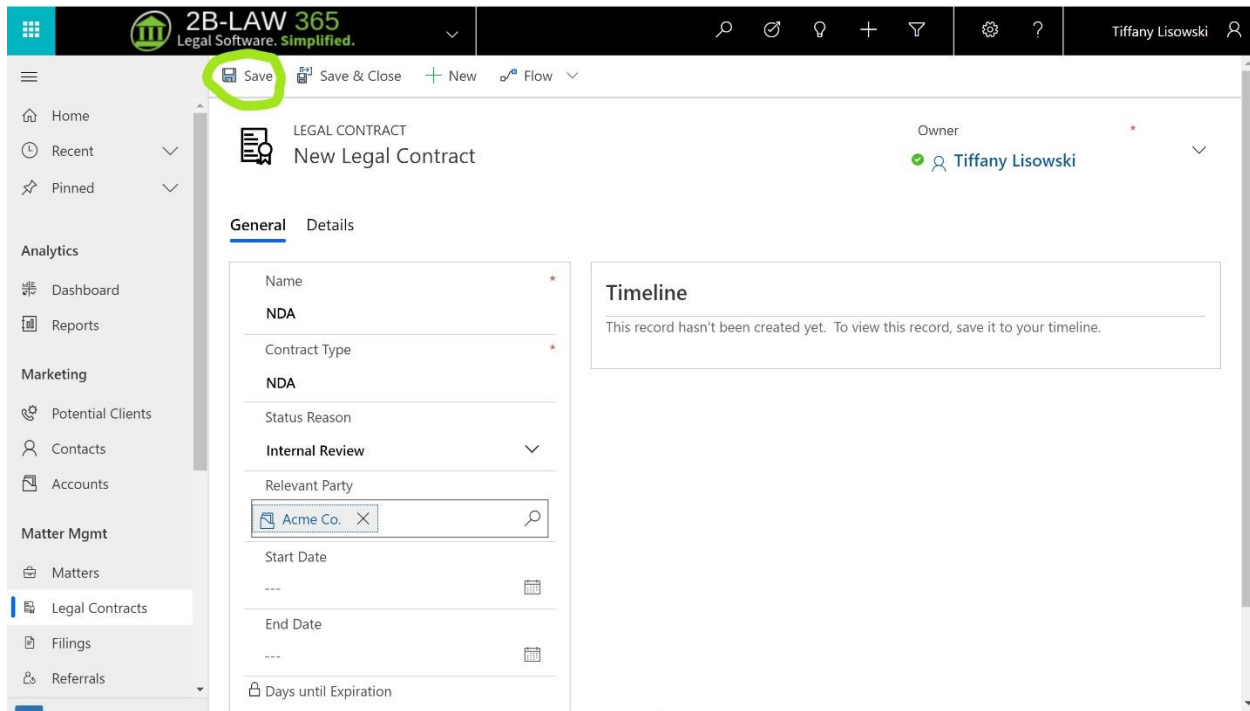


2. The default view shows Active Legal Contracts. To enter a new Legal Contract, Click +NEW.

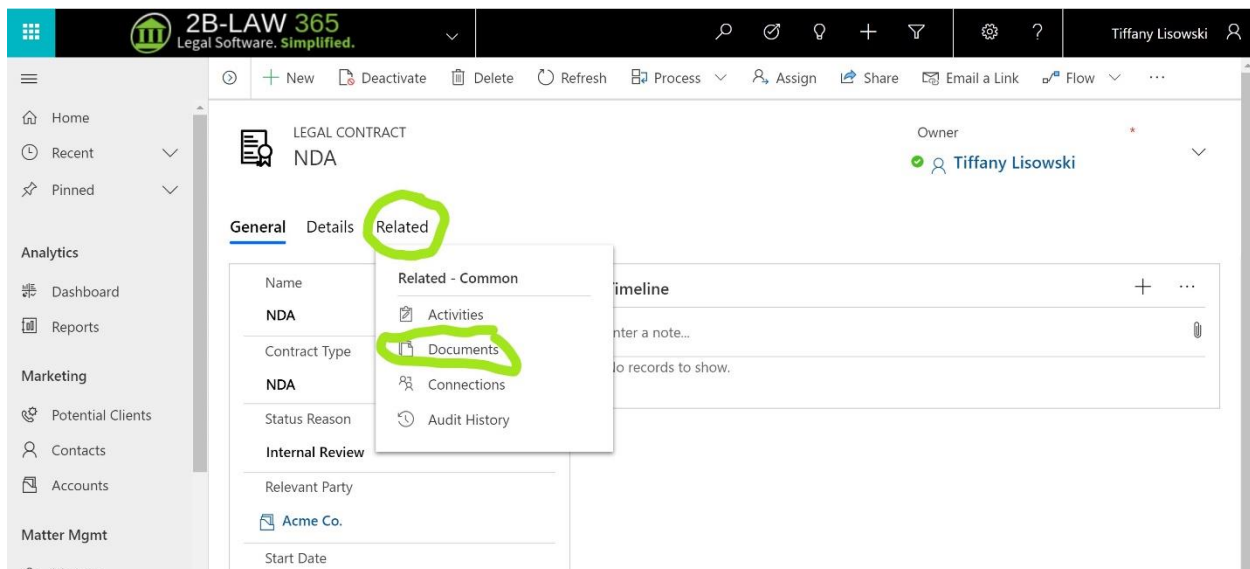
The screenshot shows the 2B-LAW 365 interface with the 'Active Legal Contracts' view. The '+ New' button in the top toolbar is highlighted with a green circle. The table below lists active legal contracts.

✓	Name	Cont...	Rele...	Start...	End ...	Days...	Resp...	Stat...
	Lease Agreement	Other	ABC Real Es...	1/1/2019	---	205	---	In Negotia...
	Non-Disclosure Agreement ...	NDA	---	5/8/2018	---	443	O Demo User	Executed

3. Enter information concerning the Legal Contract and SAVE.



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



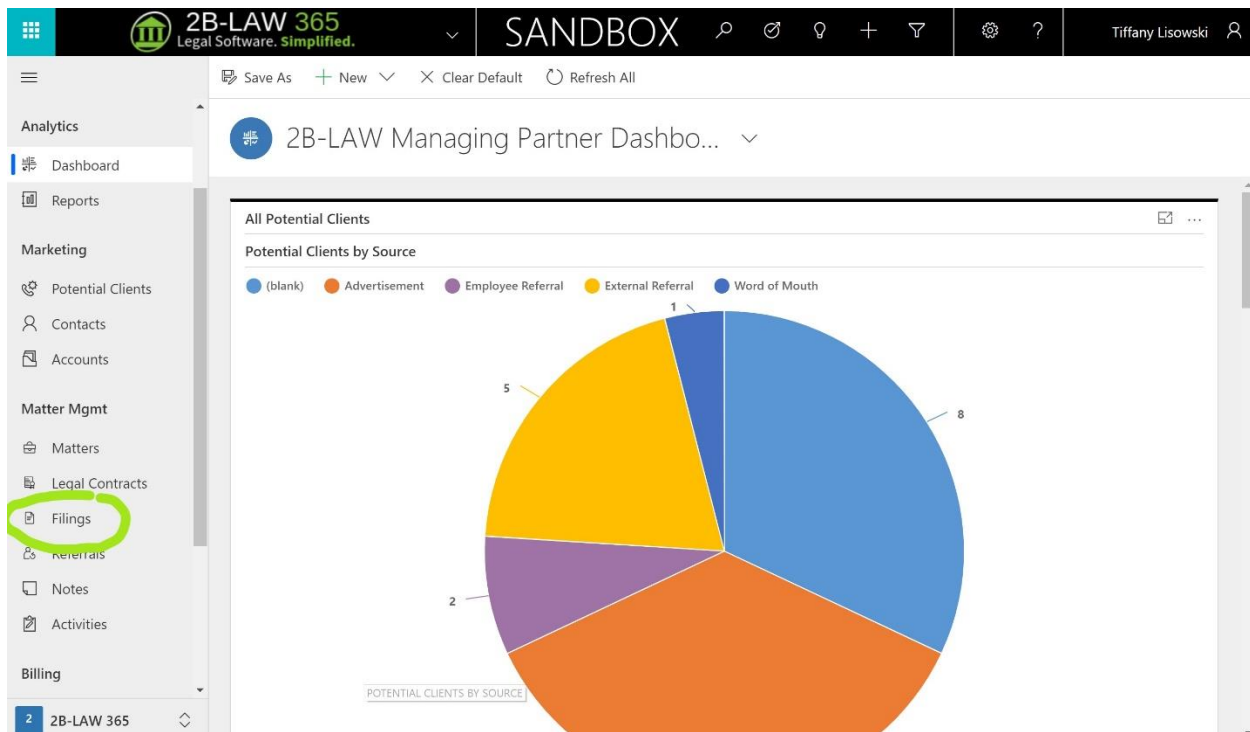
5. Click on Upload and select the document file to attach.

The screenshot displays the 2B-LAW 365 Legal Software interface. The top navigation bar includes a sidebar with icons for Home, Recent, Pinned, Analytics, Marketing, and Matter Mgmt. The main content area is titled 'LEGAL CONTRACT NDA' and shows the 'Documents' tab selected. Below the tabs, there is a 'Document Associated Grid' with a table header (Name, Modified, Modified by, Location, Path) and a message 'No data available.' The bottom status bar shows '2B-LAW 365', 'Active', 'Created On: 7/25/2019', and '9:55 AM'.

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”.

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

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

Active Filings

Search for records

✓	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	---	---

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 - 16 of 16 (0 selected)

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

2B-LAW 365 Legal Software. Simplified.

Active Filings

✓	Matter	Type	Date... ↑	Filed...	Description	Document
	Anthony Avery (Sample)	---	---	---	---	---
	Jane Doe	Motion for Extensi...	---	---	---	---
	John Doe	Motion for Extensi...	---	---	---	---

4. Enter applicable information and SAVE.

2B-LAW 365 Legal Software. Simplified.

Save Save & Close + New Flow

FILING New Filing

Owner Tiffany Lisowski

General

Name
Chapter 13 Petition

Matter
Anthony Avery (Sample)

Type
Petition

Date Filed
7/3/2019

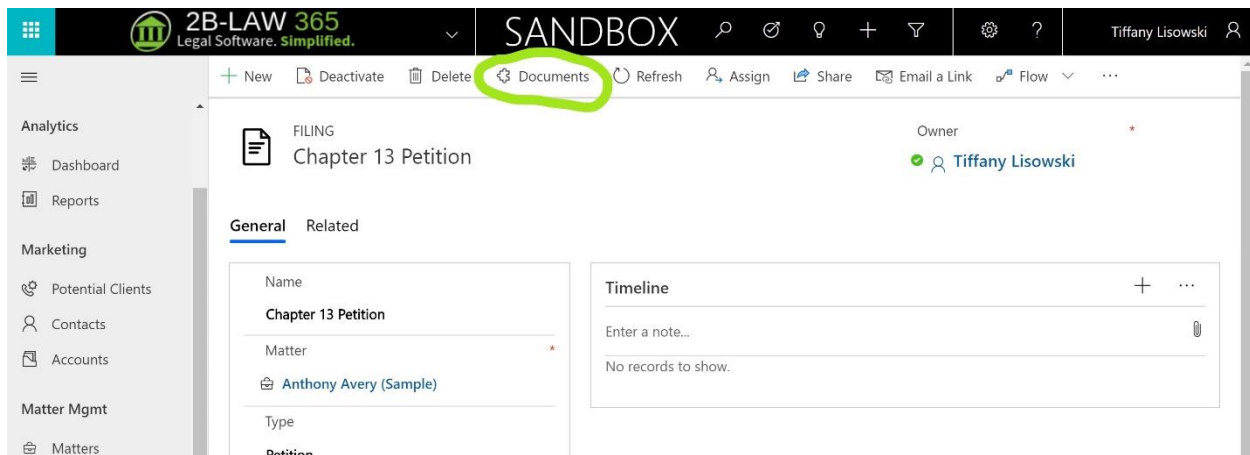
Filed By
Demo User

Description

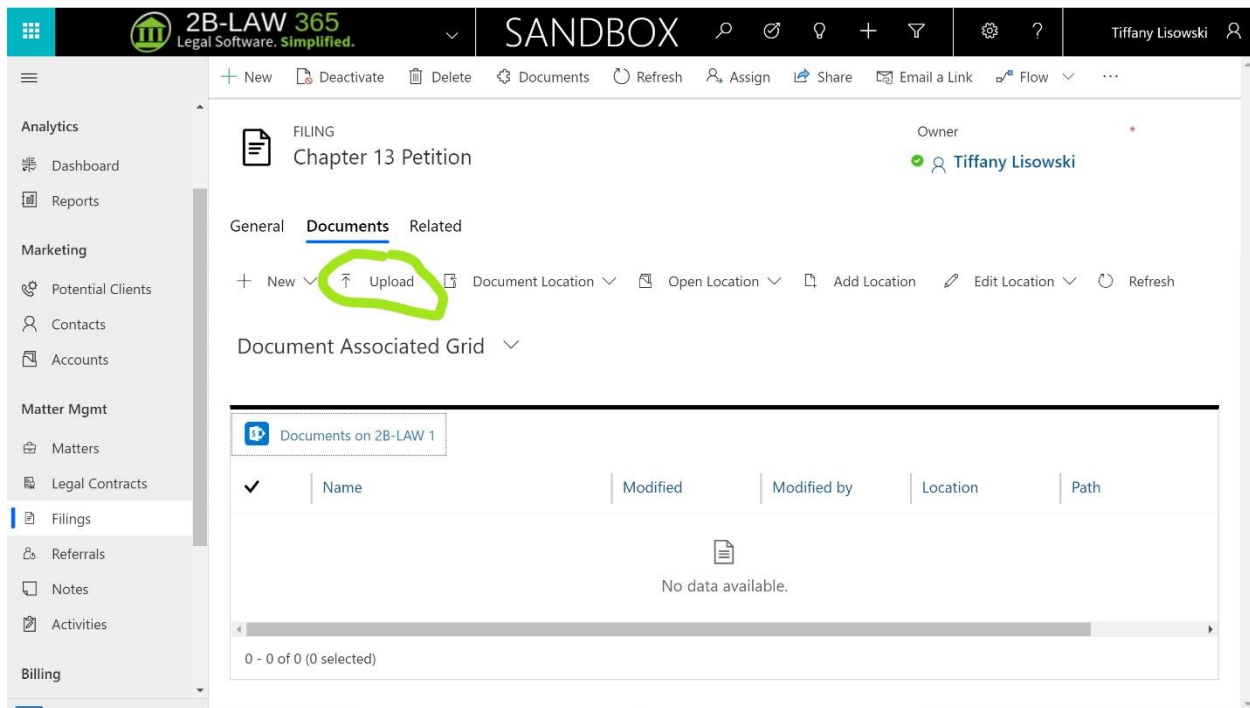
Timeline
This record hasn't been created yet. To view this record, save it to your timeline.

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

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



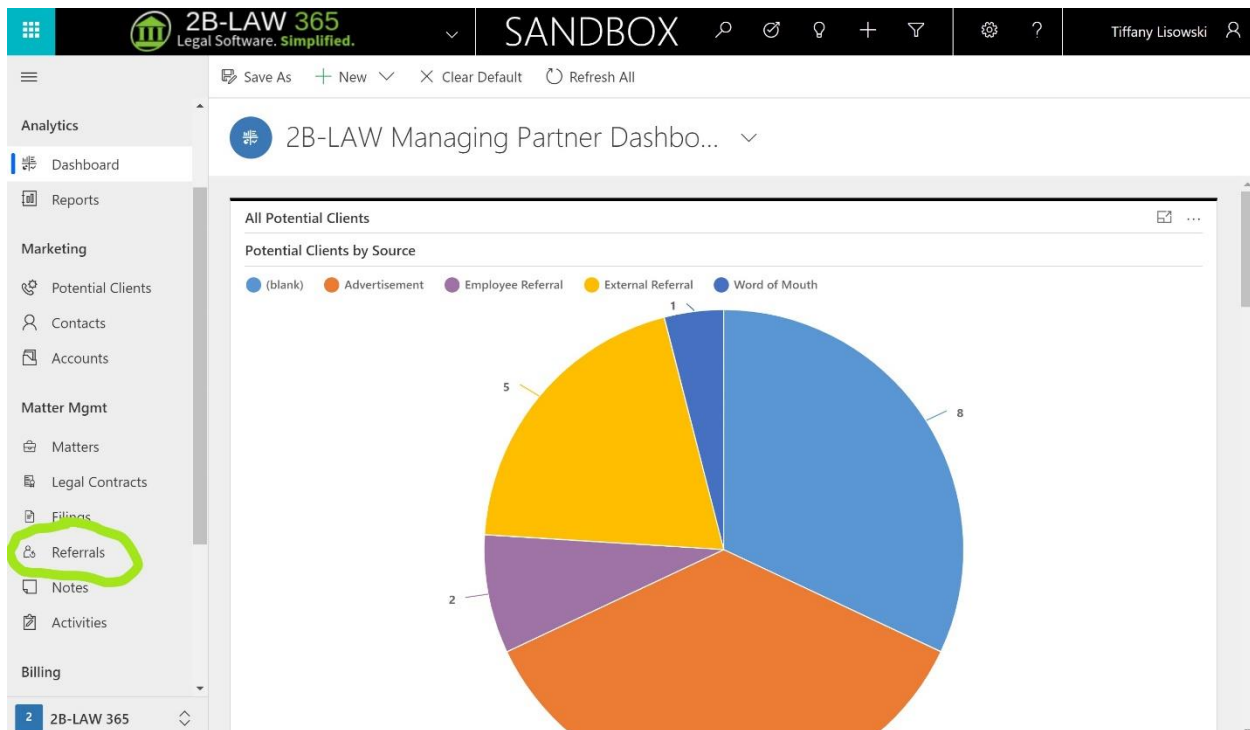
6. Click on “Upload” and select the document.



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' section selected in the sidebar. The main content area displays a table titled 'My Active Referrals'. The '+ New' button is highlighted with a green circle. The table has the following columns: Name, Referre..., Ref..., Cas..., Fee..., Esti..., Foll..., and Owner. The first row of data is as follows:

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

3. Enter information regarding Referral and SAVE.

2B-LAW 365

Legal Software. Simplified.

Save

Save & Close

New

Flow

Tiffany Lisowski

Analytics

Dashboard

Reports

Marketing

Potential Clients

Contacts

Accounts

Matter Mgmt

Matters

Legal Contracts

Filings

Referrals

Notes

Activities

Billing

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

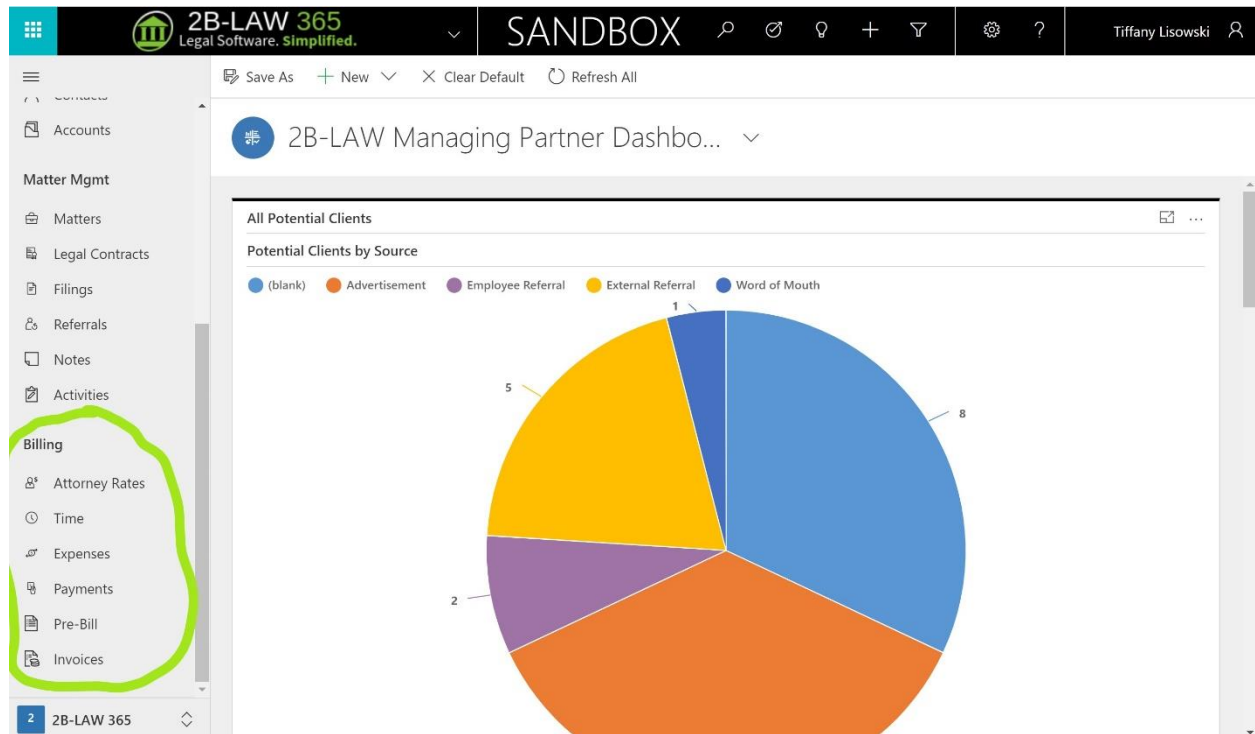
Created On: ---

unsaved changes

Save

BILLING

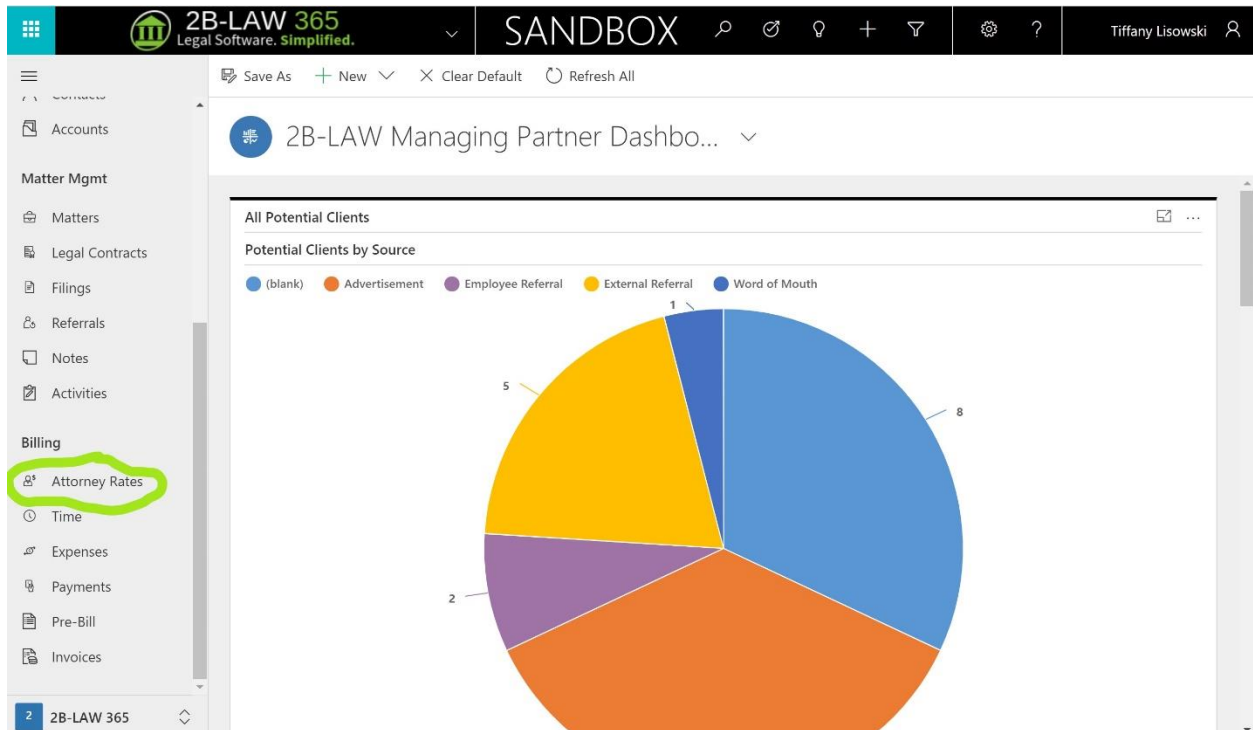
The Billing section of 2B-LAW is meant to provide a basic accounting function and includes entities to enter Attorney Rates which deviate from the default billing rates, enter Time and Expenses, as well as track Payments and create Pre-Bills and Invoices.



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.

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

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

Active Attorney Rates

Search for records

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.

2B-LAW 365 Legal Software. Simplified.

Active Attorney Rates

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

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.

2B-LAW 365 Legal Software. Simplified.

ATTORNEY RATE
New Attorney Rate

Owner: Tiffany Lisowski

General

Attorney: Tiffany Lisowski

Matter: Anthony Avery (Sample)

Billing Rate: \$250.00

Name: Tiffany Lisowski | Anthony Avery (Sample)

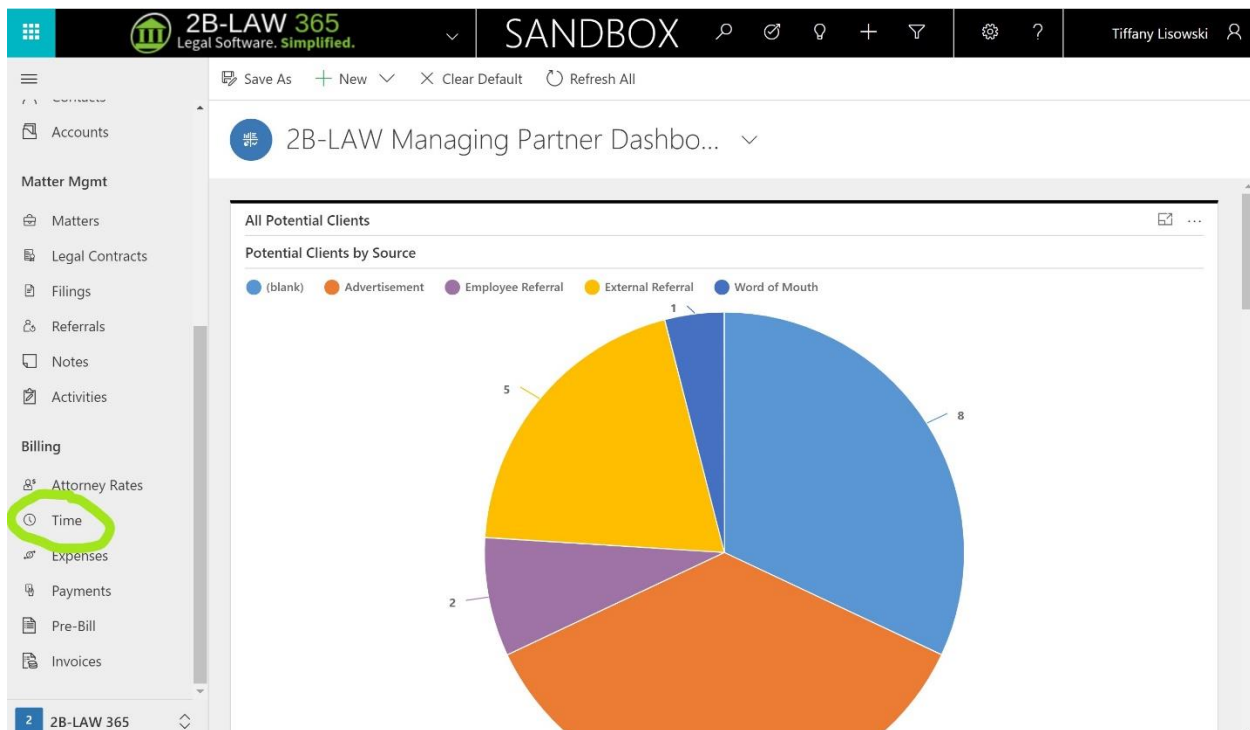
Timeline

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

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. Tiffany Lisowski

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

Active Time Search for records

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	---

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 - 19 of 19 (0 selected)

2B-LAW 365

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

2B-LAW 365 Legal Software. Simplified

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. Enter pertinent information for the Time entry and SAVE.

2B-LAW 365 Legal Software. Simplified

TIME New Time

Duration ---

Time Description Billing

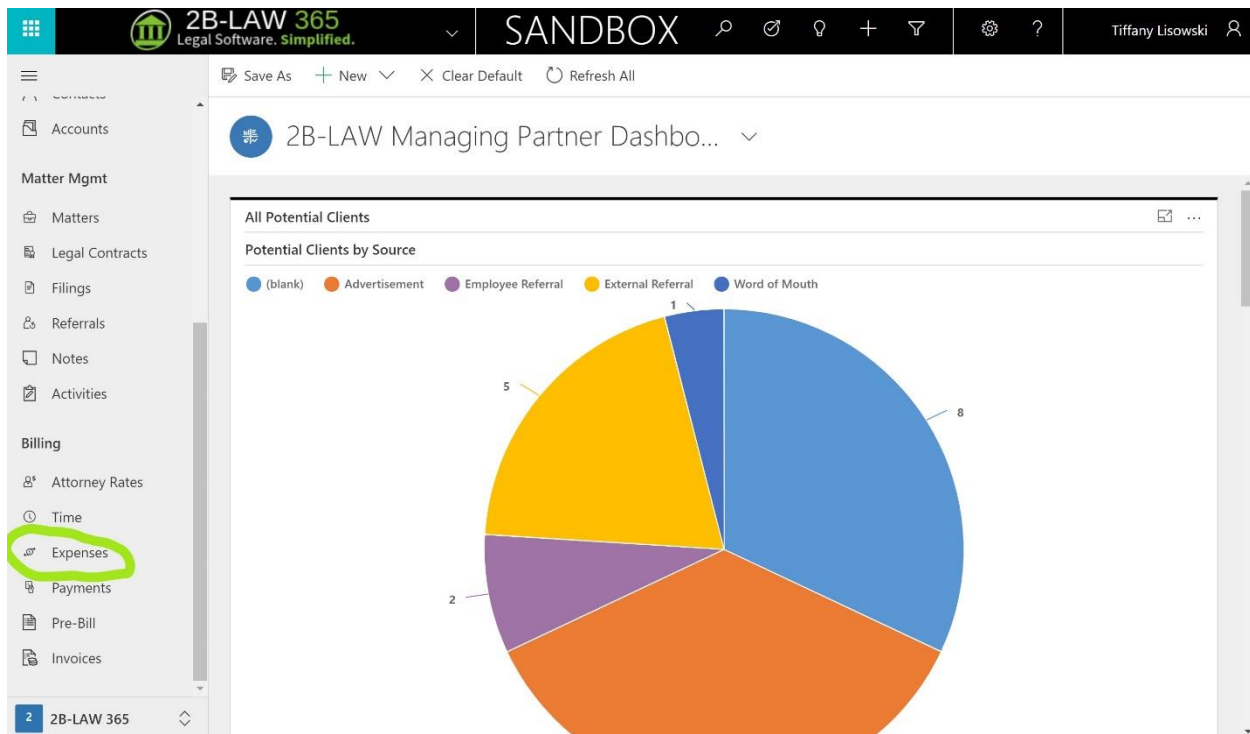
Matter	* Anthony Avery (Sample)	Owner	* Tiffany Lisowski
Case Type	* Bankruptcy	Initials	TR
Fee Type	Hourly - Default	Name	Tiffany Roberts
Activity Code	A103 Draft/revise	Currency	US Dollar
Task Code	L210 Pleadings		
Description	Preparation of Chapter 13 Petition		

2B-LAW 365 Active Created On: --- unsaved changes 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 f
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)

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. Tiffany Lisowski

Save Save & Close + New Flow

EXPENSE Paid To: John Jones
New Expense

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

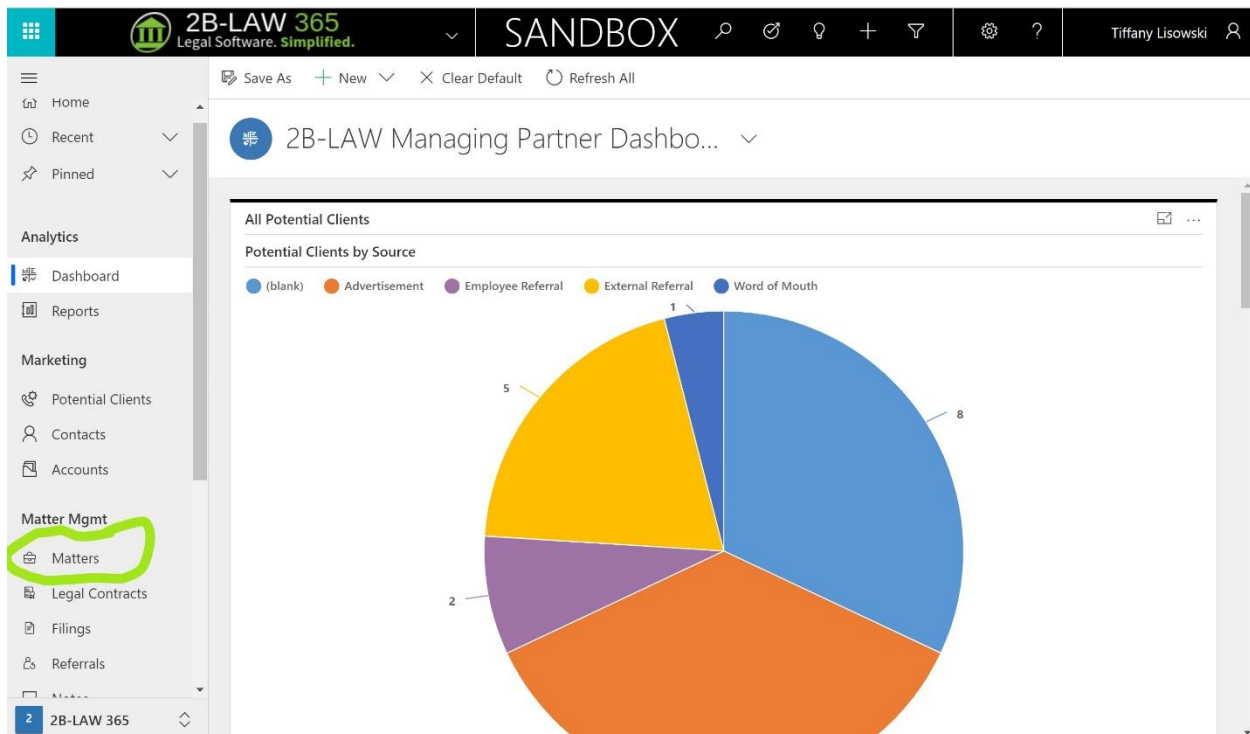
Fee to copy financial documents.

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

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)

Analytics

- Dashboard
- Reports

Marketing

- Potential Clients
- Contacts
- Accounts

Matter Mgmt

- Matters
- Legal Contracts
- Filings
- Referrals

2B-LAW 365

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

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

Created On: 8/8/2018 1:07 PM

Matter: Matter Information Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

CASE INFORMATION

Client	Anthony Avery (Sample)
Name	Anthony Avery (Sample)
Matter Number	MAT-180808-01014
Assigned Attorney	Demo User
Date of Accident	---
Case Type	Bankruptcy
Status Reason	Active
Referred to	---

Timeline

Enter a note...

OLDER

Email from Normal - test CRM:0004008 UDRFHSUH Anthony Avery (Sample)

Note modified by Tiffany Lisowski - Tuesday, December 4, 2018 12:50 PM test note

2B-LAW 365 Active Matter Number: MAT-180808-01014 Save

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

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

Created On: 8/8/2018 1:07 PM

Matter: Matter Information Anthony Avery (Sample)

Summary Connections Docket Trust Ledger Outcome Related

CASE INFORMATION

Client	Anthony Avery (Sample)
Name	Anthony Avery (Sample)
Matter Number	MAT-180808-01014
Assigned Attorney	Demo User
Date of Accident	---
Case Type	Bankruptcy
Status Reason	Active
Referred to	---

Timeline

Enter a note...

OLDER

Email from Normal - test CRM:0004008 UDRFHSUH Anthony Avery (Sample)

Note modified by Tiffany Lisowski - Tuesday, December 4, 2018 12:50 PM test note

2B-LAW 365 Active Matter Number: MAT-180808-01014 Save

Confirm

This process could take a few minutes

Create Pre-Bill of unbilled time and expenses for this matter?

OK Cancel

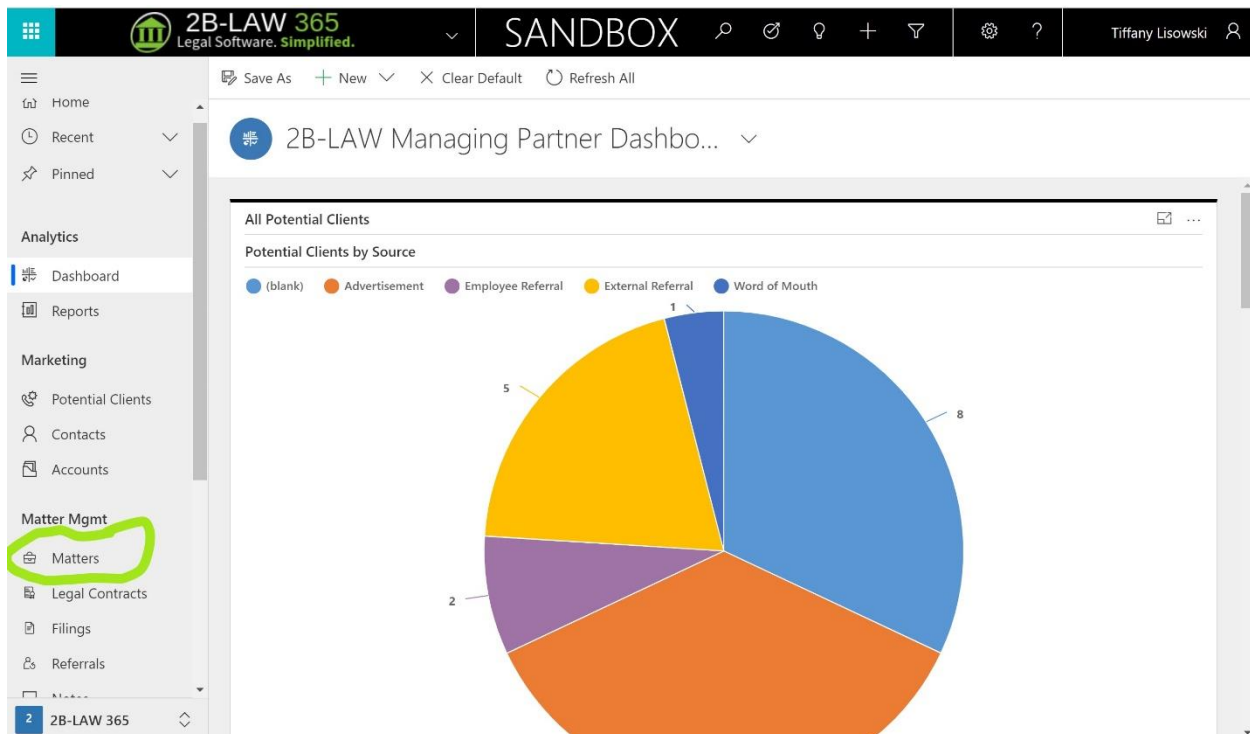
5. A new screen will pop-up showing the Pre-Bill information. Items on the Pre-Bill can be edited by clicking on that item.

The screenshot shows the 2B-LAW 365 Pre-Bill interface. The top navigation bar includes the 2B-LAW 365 logo, a dropdown menu, and the text 'Pre-Bill > Anthony Avery (Sample)'. The main header area displays 'Pre-Bill: 2B-LAW Pre-Bill' with a dropdown, 'Anthony Avery (Sample)', 'Total Amount \$0.00', and 'Status Active'. Below this, there are tabs for 'Summary', 'Details', and 'Related'. The 'Summary' tab is active, showing a list of items with columns for 'Expense', 'Not Configured', and 'Amount'. The items are: 'Expense Not Configured \$25.00', 'Expense Not Configured \$110.00', 'Legal Service Not Configured \$250.00', and 'Legal Service Not Configured \$0.00'. On the right, there is a 'Client' section with 'Anthony Avery (Sample)' and a 'DESCRIPTION' section with '---'. The bottom status bar shows 'Active', 'Created On: 7/25/2019 10:40 AM', 'Modified On: 7/25/2019 10:40 AM', and a 'Save' button.

Expense	Not Configured	Amount
Expense	Not Configured	\$25.00
Expense	Not Configured	\$110.00
Legal Service	Not Configured	\$250.00
Legal Service	Not Configured	\$0.00

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.

The screenshot shows the 'Active Matters - All' view in 2B-LAW 365. The left sidebar has a green circle around the 'Matters' icon. The top bar includes a search box and a 'Flow' button. The table below lists active matters with columns for Name, Client, Case Type, Jurisdiction, Assigned Attorney, and Balance. The first row is selected, and the 'Flow' button is highlighted.

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 Rum...	Business	Dubai	○ Demo User	\$312.50
✓ Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District...	○ Demo User	\$891.50
✓ Cecilia Williams (Sample)	Cecilia Williams (S...	Bankruptcy	Northern District...	✓ Tiffany Lisowski	(\$250.00)
✓ Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	✓ Tiffany Lisowski	\$250.00

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

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

Active Matters - All

Manage
 Create a flow
 See your flows
 Run Workflow
 2B-LAW Create Pre-Bill

Name	Client	Case Ty...	Jurisdiction	Assigned To	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 Rum...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District...	Demo User	\$891.50
Cecilia Williams (Sample)	Cecilia Williams (S...	Bankruptcy	Northern District...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

1 - 19 of 19 (19 selected)

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

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

Active Matters - All

Search for records

Confirm Application of Workflow

This workflow will be applied to 19 Matters.

You can monitor workflow jobs by opening each Matter and clicking Workflows. Are you sure that you want to continue?

OK Cancel

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 Rum...	Business	Dubai	Demo User	\$312.50
Anthony Avery (Sample)	Anthony Avery (Sa...	Bankruptcy	Northern District...	Demo User	\$891.50
Cecilia Williams (Sample)	Cecilia Williams (S...	Bankruptcy	Northern District...	Tiffany Lisowski	(\$250.00)
Craig Masters (Sample)	Craig Masters (Sa...	Family Law	---	Tiffany Lisowski	\$250.00

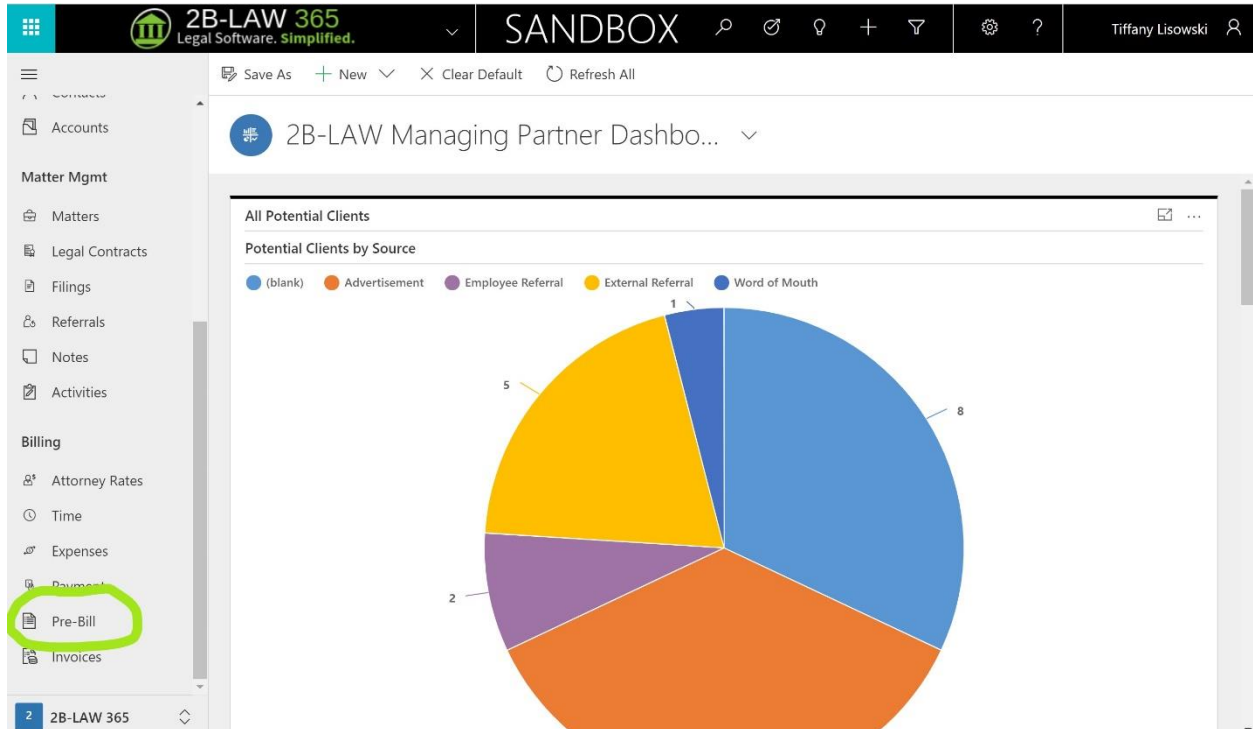
1 - 19 of 19 (19 selected)

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.

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

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

All Pre-Bills Search for records

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

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 - 17 of 17 (0 selected)

2B-LAW 365

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

2B-LAW 365
Legal Software. Simplified.

Tiffany Lisowski

+ New Delete Refresh Create Invoice Process Fulfill Order Cancel Order Recalculate

PRE-BILL Total Amount \$0.00
Acme Co.

Summary Details Related

Order ID: ORD-01025-C0F2G9

Name: Acme Co.

Currency: US Dollar

Price List: 2B-LAW

Prices Locked: No

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

Detail Amount: \$0.00

(-) Discount (%): ---

(-) Discount: ---

(+) Total Tax: \$0.00

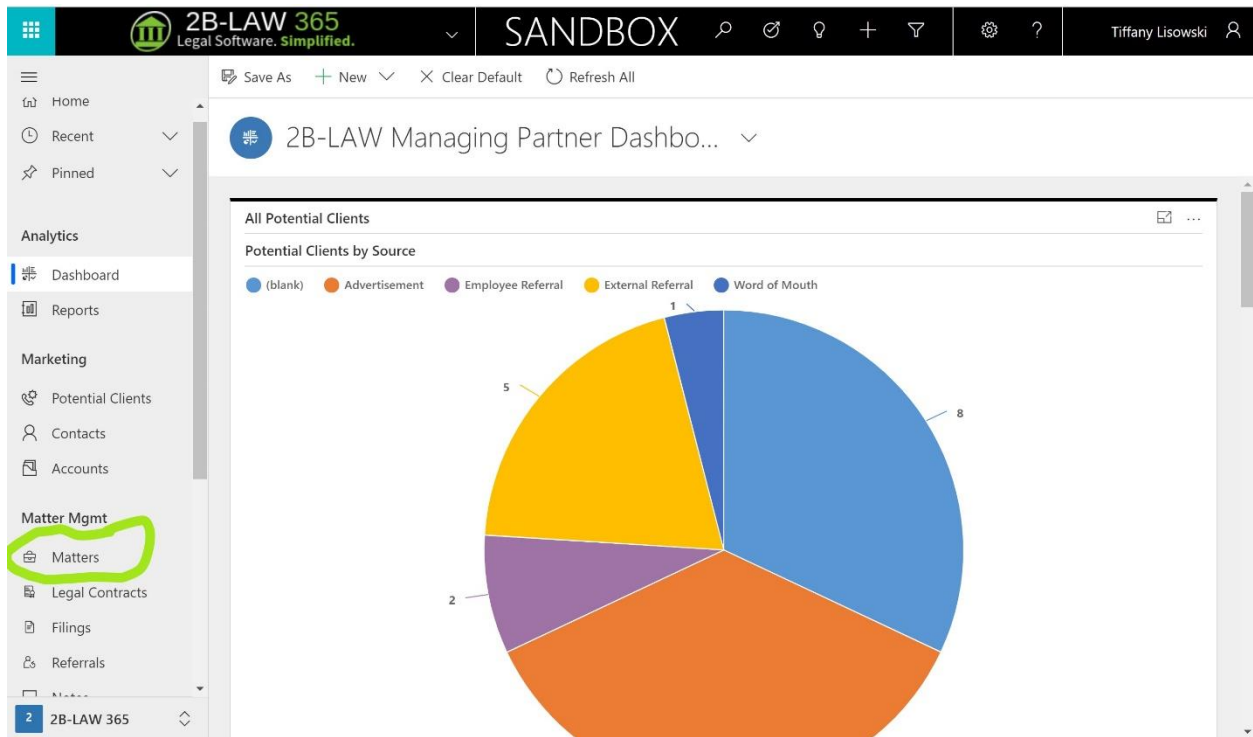
ADDRESSES

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

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.

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

Home Recent Pinned Analytics Dashboard Reports Marketing Potential Clients Contacts Accounts Matter Mgmt **Matters** Legal Contracts Filings Referrals

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

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

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

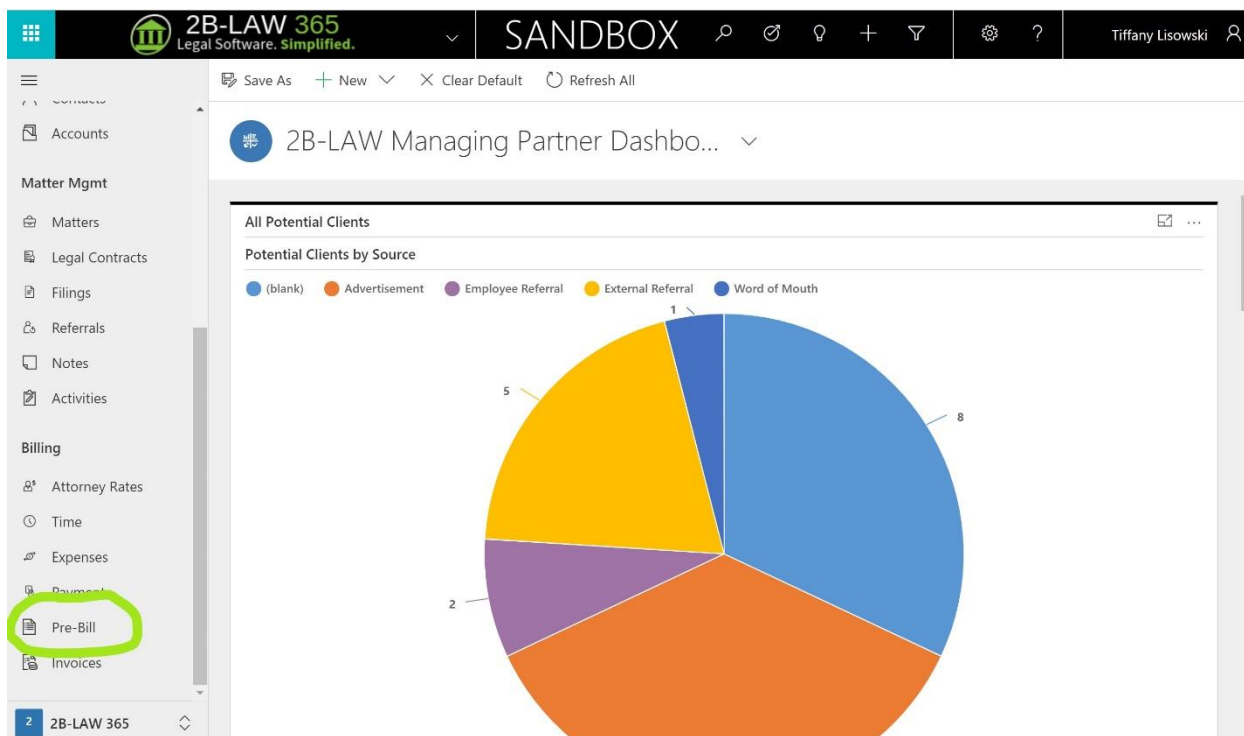
1 - 4 of 9 (0 selected) Page 1

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.

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.

The screenshot shows the 'All Pre-Bills' view in 2B-LAW 365. The table lists pre-bills with columns for Name, Status, Total Amount, Customer, and Email (Customer). The table is filtered to show 'All' pre-bills. The status of the pre-bills is: New, Pending, Pending, New, New, New, and In Progress.

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

1 - 17 of 17 (0 selected)

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

The screenshot shows the 2B-LAW 365 interface. The top navigation bar includes a search icon, a plus icon, a refresh icon, a process icon, a recalculate icon, a look up address icon, an assign icon, a share icon, an email a link icon, and a three-dot menu icon. The three-dot menu is open, showing options: Flow, Word Templates, and Run Report. The 'Run Report' option is highlighted with a green circle. The main content area displays a 'PRE-BILL' for 'Anthony Avery (Sample)'. The 'Summary' tab is selected, showing details like Order ID (ORD-01020-H7J0T3), Name (Anthony Avery (Sample)), Currency (US Dollar), Price List (2B-LAW), and Prices Locked (Yes). A table shows a single line item: Legal Ser... Not C... \$250.00 1.00000 --- \$250.00. The bottom status bar shows 'Submitted', 'Created On: 1/29/2019', and '8:32 AM'.

The screenshot shows the 2B-LAW 365 interface with the 'Run Report' dropdown menu open. The dropdown menu has a 'Back' button and a 'Run on Selected Records' section. Under this section, there are three options: '2B-LAW 365 Pre-Bill', '2BLAW Invoice', and 'Order'. The '2BLAW Invoice' option is highlighted with a green circle. The main content area displays the same 'PRE-BILL' for 'Anthony Avery (Sample)' as in the previous screenshot, with the 'Summary' tab selected and the same details and table.

4. A customizable Invoice will be created.

[Edit Filter](#)

1

of 1



100%



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 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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