OWL'S LAW OFFICE MANAGEMENT

Owl Software Inc.
515 N. Velasco
Angleton, Texas 77516
979.849.8511
owl@owllaw.com

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By purchasing this program, you are licensed to use the Casefile Management Database on one computer or server and to install three workstations with access to the Law Office Management Database.

INSTALLATION INSTRUCTIONS

To install Owl's Law Office Management, follow these easy steps:

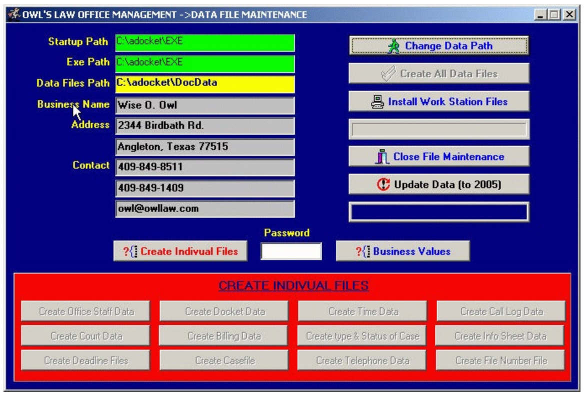
1. Place the CD in the appropriate drive;

2. If the installation program does not start, open **My Computer,** and then double click on the CDROM drive. If that fails to start the install program, open the CDROM drive and click on **Launch.exe**

3. After installation is complete, the program will place a program icon in the folder, Owl's Programs on the Start Menu and on the desktop.

CASEFILE INSTALLATION INSTRUCTIONS

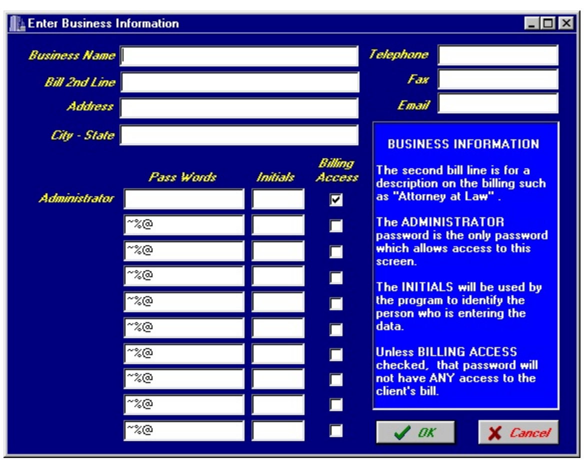
Upon starting the program for the first time, you will get a message about there not being any data files (this is normal at this point) and the data installation screen will be displayed. If the installation screen is not automatically accessed, Click on “Start”, the of “Programs”, and then on “Owl Programs” and then on “Law Office Data Maintenance”



Law Office Data Maintenance

The information in the upper left hand column will show the current directory for the startup program (exe) file, and the Data file path. If the program will be used on a network with multi-user access, then you will need to click on “Change Data Path” to establish the location for the data files to be created. Once the data path has been determined, click on “Create All Data Files” to **create** the data files at the location selected. The program will notify you when the procedure has ended. After creation is complete, the initial information screen will be displayed for you to enter the basic information and passwords for the persons using the Casefile program.

First, enter the Administrator password and initials. The Administrator has automatic access to all parts of the program and is the only person who can access this screen and “Casefix.exe”. Next, enter the passwords and initials of the other persons who will have access to the program. Indicate by a check mark whether or not they will have access to the client billing. Enter the information at the top of the screen. The bill 2nd line will appear just after the “Business Name” on the client’s bill when it is printed. After making all of the entries, click on OK.



Data and Password Entry Screen

Next click on “”Install Work Station Files”. When that is complete, click on the “Close File Maintenance” button and go to the next step of the installation. (INSTALLATION OF THE WORKSTATIONS)

INSTALLATION SECOND STAGE:

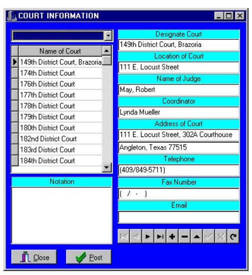
Begin the program as follows:

1. Click on “Start”
2. Click on “Programs”
3. Click on “Owl’s Programs”
4. Click on “Owl’s Law Office Management”; After entering the correct password, the program will display the initial screen. On the menu click “Maintenance” and then click “Staff Members”.

STAFF MEMBERS

Staff Members and their initials should be listed here. The bar at the bottom of the box is called a navigation bar. To add a name, you must click on the **plus sign**; to edit, click on the **Delta sign**. When finished, click on the **check mark to post** to the database. Clicking on the **X or the turning arrow** will cancel the change. The **minus sign** will delete the selected name.

After entering all the names of the office staff who will be concerned with the program, click on close and then follow the next step.



COURT INFORMATION

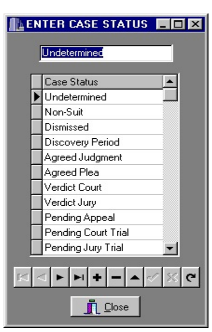
On the menu click “Maintenance” and then click “Courts”.

Fill in information for all of the courts that you normally deal with in your practice. The navigation bar is same as in the previous example.

ATTORNEY INFORMATION-TELEPHONE DIRECTORY

Click the Telephone Icon at the top of the case management screen. Fill in the attorney information for the attorneys that you customarily do business with. The navigation bar is used in the same manner as listed above. This is the same database as the telephone directory. Attorney information can be pasted from the directory into the casefile information screen. You should add to this database all of the persons who are likely to be called during your business activities.

Type of Case



Case Status

Type of Setting

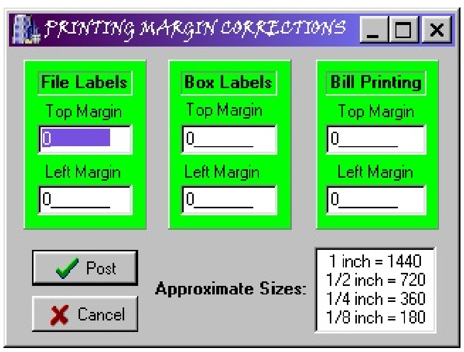
If desired, you can modify the list for the **type of case** and the **status of the case** which will be entered in the “Display Case” screen while the program is running. Also you can edit the **type of setting** list which is used when adding or editing docket settings. The navigation bar is same as listed above.

INSTALLATION OF ADDITIONAL WORKSTATIONS

Install Owl's Law Office Management from the CD at the computer that you are using for a workstation. When installing the workstation, it is not necessary to set up the files as described above because you have already set up the basic data for use by the workstations. However, there are some files which need to be copied. After the DATA FILE MAINTENANCE screen appears, click on the "Change Data Path" button and select the path or folder where the data files are located. When the correct path is entered, the Business Name and other information previously entered will appear. At that point click on the "Install Work Station Files". The necessary files will be copied to the local directory on the workstation. After the copying is finished you can click on "Close File Maintenance" to complete the process.

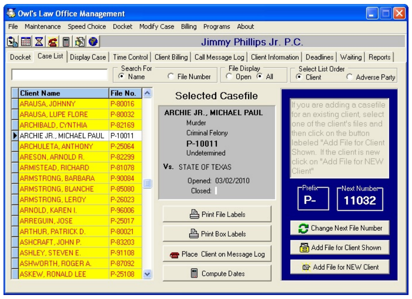
On the "DATA FILE MAINTENANCE" screen, you will see an area outlined in red. The red area has buttons that are to be used only in an emergency if some specific data file has become corrupted and cannot be corrected by using a backup file or "Casefix". In order to use this procedure, it is necessary that you contact Owl Software, Inc. There is no charge for this service, and it may well prevent adverse irreversible damage to your program data were you to attempt it yourself.

When printing, sometimes is necessary to adjust the top or the left margin of the printed page. Use the respective margin to correct the printing of the File Labels, the Box Labels, and the Printed Bills. The corrections only affect the workstation that entered them. The option can be accessed on the maintenance menu by clicking **"Report Margins"**. These settings only affect the specific workstation on which they are entered.



PROGRAM OPERATING INSTRUCTIONS

After starting the program enter the password to gain access to the program file. The client billing aspects of the program are accessible only if your password has billing access.



LAW OFFICE MANAGEMENT MAIN SCREEN

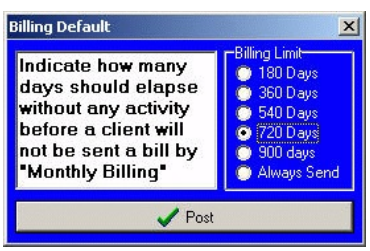
The main screen is the heart of the program. Across the top is the MENU access. Under the heading FILE is BACKUP and QUIT. The backup function will make a complete copy of all of the data files to the drive and directory that you choose. The backup procedure should be completed on a regular basis, at least once each week. Choosing QUIT from the menu will close the program.

After the initial installation of the program, the next choice MAINTENANCE should be used to enter the STAFF, and COURTS which create lists that will be used later in the program as you add clients to the database. The initial list of TYPE OF CASE, STATUS OF CASE and TYPE OF SETTING can be modified under the choices available under the MAINTENANCE heading.

Speed Choices are available to you from the menu and from the control key choices listed in the menu. They can be accessed from any part of the program. For example to find and display a client's information:

1. Press **<ctrl>F** at the same time.
2. Type the client's name.
3. Press **<ctrl> G** to place focus on the client name grid.
4. Use the arrow keys to find the specific file for the client in the grid.
5. Press **<ctrl> D** to display the case information.
6. Press **<ctrl> S** to display and focus on the setting grid.
7. You can also display a client's file by double clicking the file in the yellow or blue grid.
8. Press **<ctrl> T** to display and focus on the time entries for the displayed file.
9. Press **<ctrl> B** to display and focus on the billing screen for the client,

The third menu heading is accessible only if the program administrator has checked "billing access" by the access password you are using. It consists of three choices, "Set Billing Defaults", "Print Monthly Billing, and "Summary Report". "Set Billing Defaults" is used to set the number of days that a client's account has been inactive because of lack of payment or accruing any charges before the "Print Monthly Bills" will not include that account when printing out the bills. To set this default, select the menu choice and then select the days. By selecting "Always Send", the client's bill for a balance greater than $0.00 will always be sent regardless of the lack of activity in the account. You must access this screen at least one time after program installation in order for the monthly billing to automatically print the bills. To automatically start the procedure to print out the client bills, select "Print Monthly Bills". If the bills print correctly, reset the bills when prompted by the program. Resetting the bills will move all of the current entries to the Archive Billing File.



Just under the Menu are seven “speed buttons”. These are represented as picture displays only, but will in dictate what they are if the mouse pointer is placed on them without any other action. Their purposes are as follows from left to right:

1. Make a quick notation which after being printed will have your access initials and the date and time at the end.
2. A Calendar to see what day a date falls on or for any other reason you need to look at a calendar.
3. A timer to time any event that your determination of the expired time may relevant.
4. Access to a telephone directory of all numbers that you might call. The Telephone Directory will be explained under its own heading.
5. The calculator that comes with the windows program will be activated.
6. The hand copying info to paper will copy the name and address of the selected client to the windows clipboard where it can then be pasted into any other program or edit control. The same feature is available in the telephone directory when you see the same icon.
7. The globe will show contact information for Owl Software Inc.

Below the “speed buttons” are “tabs”. Selecting a tab by clicking the mouse on it displays information below the tab that the tab is related to. There are ten different tabs.

1. Full docket
2. Case List
3. Display Case
4. Time Control
5. Client Billing
6. Call Message Log
7. Client Information
8. Deadlines
9. Waiting
10. Reports

When the program starts, the tab “Case List” is selected for you. From this position, you will locate the client desired in your database and display information on his case. There are three sections in this screen. A yellow grid lists all clients. As each client file is highlighted in the yellow grid, basic information is shown about that client’s file in the center of the screen. Any file shown under the select file will have details of that client’s information under the tabs “Display Case”, “Time Control”, and “Client Billing”.

A client’s file can be found in a search for his name or a search for the specific file number. Type the either the name or file number in the space just in front of the “search for” box for Name or File Number. The “File Display Box” allows you to list all files or just the open casefiles. In the “Select List Order” box, you will notice two radio buttons, “Client” and “Adverse Party”. When you choose “Adverse Party”, the grid will change from yellow to blue. When the grid is blue, it lists all adverse parties in alphabetical order. Additionally, you can search for the files that the adverse party appears in by typing the name in the edit control to the left of the “Search For” box.

Below the displayed information for the selected client’s file are four buttons. The first button will print out two file labels, one account label, and three box #1 labels. These are printed on a standard Aviary label sheet. (Six to a page).(Avery Label #5164 Shipping Label)

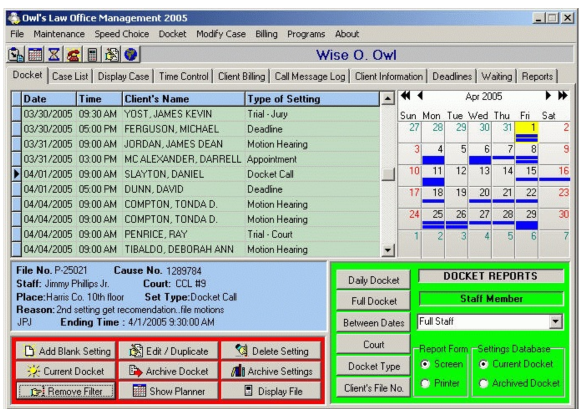
The second button will print six box labels with the client name, the file number and your name and address. This is just a easy way to label the boxes, when a client’s file grows larger than a file folder. (Avery Label #5164 Shipping Label)

The next button will place the client selected on the message log and allow you to make a notation of why you want to contact the client.

The last button will allow you to calculate the number of days between two dates and also the date after a certain number of days. Negative numbers can be used. When calculating dates, the first Monday after the calculated date is always shown.

The third section of the displayed screen is shown in dark grey. Use this section to add clients to the database. Your file prefix is displayed along with the next file number. File numbers are composed of a prefix and 5 digits. The prefix is generally used for file designation purposes. When beginning for the first time, you will want to set up your file prefix and file number. To do so, click the "Change Next File Number" button. Then enter the prefix and the starting number. The starting number or next number must be five numbers. The prefix can be alpha or numbers, but alpha characters are preferable. Once a number has been set, the program will automatically select the next number for each new client file you enter. Duplicate numbers are not allowed by the program.

After the initial file number setting, you should not normally have to change the setting. To enter a new file, you would select one of the two remaining buttons. **If the client exists and has previous case files in the database**, display one of the client's previous files, and select the button labeled "Add File For Client Shown". The reason for this in addition to the fact that his previous information will not have to be retyped, unless out of date, is that when the client is assigned his first file, he is also assigned a specific account number by the program. The program uses this account number to track the information about this client. It is also his accounting number for his billing activity. A client can have many files and settings, but he can have only one account. **If the client has never had a casefile before**, select the bottom button, "Add File For NEW Client".



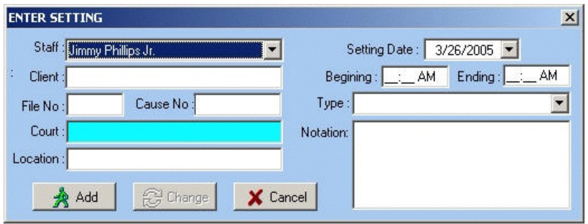
Full docket

The Full Docket tab is where your calendar is controlled. The only exception is that when displaying a client's case file, you can set his case on the docket or find all settings he has for that specific file. It is always better to enter any setting which is specific to a client's file from the "Display Case" screen to keep the basic information (cause no., court, etc...) consistent. For settings in which you do not have the client's case in the system, you would use the button in this screen.

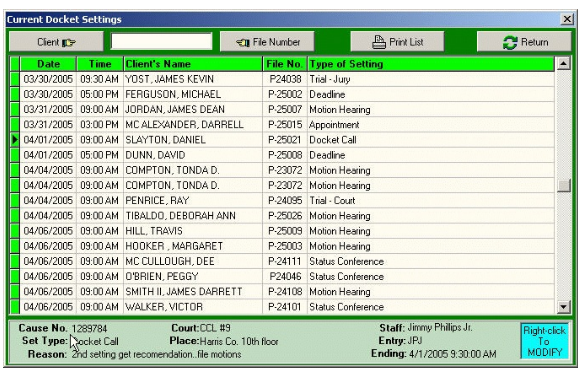
The program maintains both a current database and an archived database. The archived database can be searched and printed the same as the active database. On the lefthand side of the screen is a setting list with the date in yellow and the file number referenced in white. When a date is in focus (highlighted), the information about that setting is displayed in the center portion of the screen. The displayed setting can be edited or deleted. However, for historical purposes, it is better to archive past settings rather than delete them.

There are eight buttons on the bottom of the Full Docket screen:

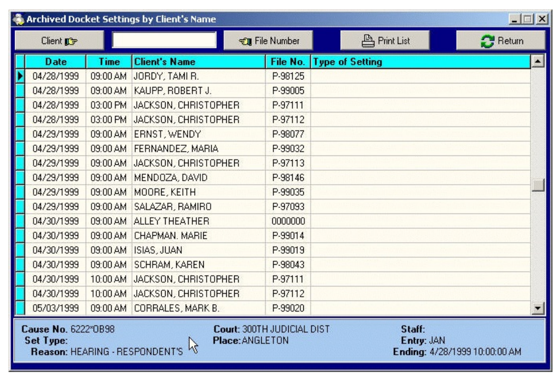
1. Add New Blank Setting	2. Edit / Duplicate Setting	3. Delete Setting
4. Current Docket	5. Archive Settings	6. Archive Settings
7. Remove Filter	8. Show Planner	9.. Display File



"Add New Blank Setting" will display a complete blank setting entry screen. "Edit / Duplicate Setting" will display the setting screen with the information which is currently selected inserted in the edit controls. Only the Notation, Date and Time need to be entered. Always make sure that you have entered the correct staff member in the setting. If there is no date, the date displayed is set as the day before today as a default. Because this is an invalid date, you must select a valid date to be entered. You must have a date in the **future** to have a valid date in the docket setting. The date can be entered by typing in the information or by clicking on the small arrow in the edit control. If you click on the arrow, a calendar will be displayed. If you click on the month, a list of months is displayed for selection. If you click on the year, you can change the year and then click on the calendar to display that year. Clicking on the right or left arrow keys advances the date by a month. Clicking the date will exit the calendar and enter the date in the edit control. Enter the time. Clicking on ADD will record an additional setting. When in the edit mode, clicking on CHANGE will record the edited change to the setting. CANCEL will exit the screen without making the changes. If you double click on any of the yellow settings you will enter the edit setting mode without having to click the edit button.



Current Docket

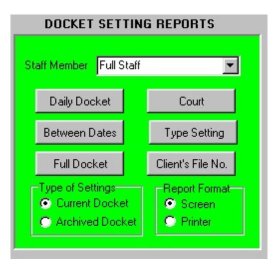


Archive Docket

The "Current Docket" and the "Archive Docket" buttons will display a grid of settings. The settings can be searched by client or by file number and the resulting list printed. If you double click on the "Current Docket" settings, you can edit the setting by selecting CHANGE or add a new setting by selecting ADD. Clicking RETURN will return to the docket screen. The "Archive Docket" cannot be modified.

To the right of the Docket buttons is a button entitled "Archive Settings". This choice will remove the dates prior to the current date and place them in the setting archive file. Once placed in the archive file, they cannot be changed or modified by the program, but they can be searched and printed the same as the current settings. You have the option of keeping them in the current docket settings until you are ready to archive them. However, the recommended procedure is to click on this choice at the beginning of each day.

The remaining options on this screen is the printing of specific reports. The reports which you will use most often will be the "Full Docket" and the "Daily Docket". However, all of the types of reports are useful. At the top of the green box is the Staff Member box. Selecting "Full Staff" will report settings for the selected report for all staff members. Selecting an individual staff member will print settings for that person and any "Full Staff" settings.



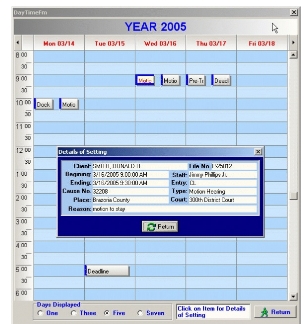
"Court", "Type Setting" and "File Number" will print settings filtered by the entry made. The "Type Setting" is useful to list all of your trial settings on your docket. The

Daily Docket will display a calendar which will print the settings on the highlighted date. A feature of this will allow you to select multiple continuous dates by holding down the left mouse button and highlighting several dates. The report will print all of those dates. This is the easiest way to print settings between two dates when you only want to print a week or two of settings. For anything else, use the “Between Dates” choice.

Under “Type Of Setting” you can choose to report the current settings or the archived settings. The second designation “Report Format” directs the program to send the report directly to the printer, or first display it on the screen. When the report is displayed on the screen, it can be printed, or it can be converted to another format.

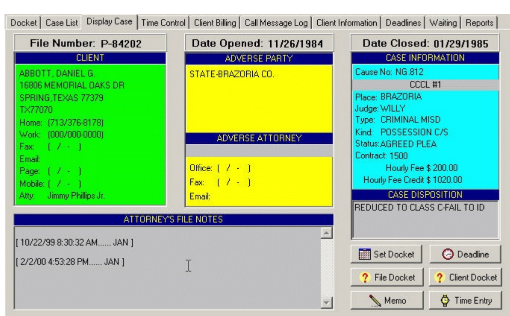
Selecting a setting on the green grid will display information about that setting in the blue information window. Double clicking the setting will automatically open the “Add / Edit” window to change the date.

On the right is a monthly calendar. If there is a setting on any of the dates displayed in the monthly calendar, a blue line will be shown on the monthly calendar. If you click on a date, only the settings on that date will be displayed in the green grid. If you choose “Remove Filter”, all of the settings will again be displayed. If you double click on the date, the “Daily Planner will be shown. You can also display the daily planner by choosing the “Show Planner” button. It will indicate the times that you have something set during the day. By default the planner will show the next five days beginning with the date that was selected in the monthly planner. You can choose to display one, three, five, or 7 days in the planner. If you click on one of the indicated dates, all details of that setting will be displayed. If you put the mouse pointer over any of the settings, the client and type of setting will be displayed.



REPORTS TO SCREEN

When a report is printed to the screen, you will see at the top of the report a number of icon buttons. You can navigate through the report with the navigation arrows. The printer button will print the report to the printer which you have selected as the windows default printer. The envelope button will allow hyou to export the report in several formats, including the ability to email the report. Next on the bar is a window which will let you view the report in different magnifications.

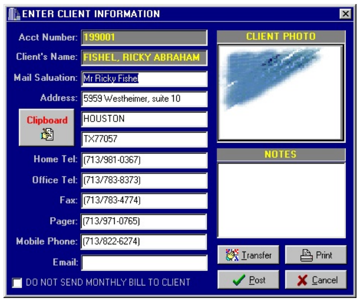


Display Case

This screen contains all of the basic information about the client’s case. The following explains how to change or modify the information which is shown. The secret is to “double click” the mouse pointer in certain areas of the screen. The “double click” areas are designated by the dark blue titles and the line that contains the attorney’s name and the line that contains the court’s name. Additionally, selecting modify case from the top menu will display the edit choices you have.

Remember that when installing the program, you were to add courts and attorneys to the respective databases with the menu selection. Now, if you double click their names on this screen, you will be able to access those listings. They both work basically the same. (See the explanation in the Installation section of this program.) After you have displayed the list, clicking on “Post” will put the name and information automatically in the client’s file data. You can also take the long route and enter all the information manually. By “double clicking” on any of the dark blue titles, you will be able to enter or modify the information displayed. When you “double click” on

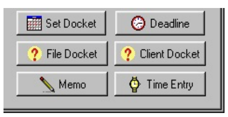
“Attorney’s File Notes” you will be able to edit or print any of the file notes that are contained in that edit control section. To save them back after editing, click “Post”. Whenever you save the “Attorney’s File Notes” the date, time and your access initials will be saved to the files.



When you double click on the client bar, the client information screen is displayed. When you change the data here, it is changed in all files that the client has and in the billing information. It is here that you can check the box a the bottom to prevent the bill from being sent out when the regular monthly statements are prepared.

Also, if you double click on the bar that says “CLIENT PHOTO” you will be able to load a bitmap picture file (“.bmp”). There are numerous programs with cameras under $50 that will take and store bitmapped pictures. Once you have saved the file, then you can load it into the client information data. Once loaded, it is not necessary to preserve the picture file you loaded. The transfer button will transfer information from the client initial visit information you filled out without you having to retype the information. (See Page 12) You can also print the photo and the information to place in the file by clicking the “Print” button.

In addition to the editing of information, there are six buttons in the lower right hand corner of the screen:



1. Set Case On Docket
2. Deadlines
3. File Docket
4. Client Docket
5. Memo
6. Time Entry

The “Set Case on Docket” button will place a client’s setting on the docket and insert all of the information from the Display Case screen, except the reason, the date and the time which you will supply in the appropriate places. **Using this for case settings will give consistent information for docket searches.**

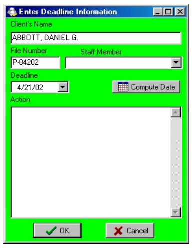
The “File Docket” button will find all of the settings for the file number of the casefile which is displayed. The Client Docket will find and display all of the settings for that client’s name. The results of the search will be displayed on the screen and you will have the opportunity to print it out at that time or edit it.

The “Memo” button will allow you to make a note about the case and print the note for future reference. After printing the note, you will still have the option to discard the note (“Cancel”) or to save it to the “Attorney’s File Notes” by clicking on the “Post” button.

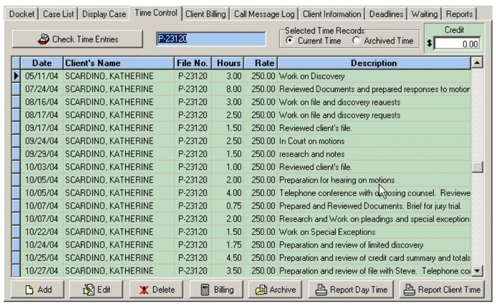
The “Time Entry” button will allow you to enter a time notation applicable to the case for future billing or time reference. You can see the time entered on the next screen, shown when the “Time Control” tab is selected. Enter the time involved. If the hourly fee was filled in when you filled in the court information, the default hourly rate will be the amount stated under “Rate”.

Remember the timer speed button (the hourglass). Click on the button, starting the timer when you begin work on the file displayed. When finished, note the time and click on the “Time Entry” button. If you right-click the mouse when the cursor is in the description edit field, a quick entry menu will be displayed. Select your choice and the edit field will be filled with the comment.

Until a file receives a closed file date, the file is considered open and active by the program. To close a file, double click on “Case Disposition” heading and then enter a note about how the file was closed and the date that it was considered completed. Thereafter, it will not be listed on the open file listing. To reopen a file that has been closed, double click on “Case Disposition” and then enter blanks for the closing date. The program will then consider the client’s file open again.



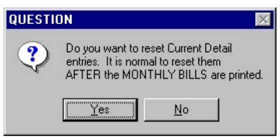
The DEADLINE button will display the deadline entry screen. When set from this screen, it will automatically have the file name and the file number inserted. You can compute the date by clicking on the Compute Date button, and you can set the date by clicking the down arrow under the deadline heading. Finally add what you want to do. Any notations made will have the entry date and time recorded. Deadlines are useful for work assignments for you staff on a daily basis and when completed can be placed in the file for work reference.

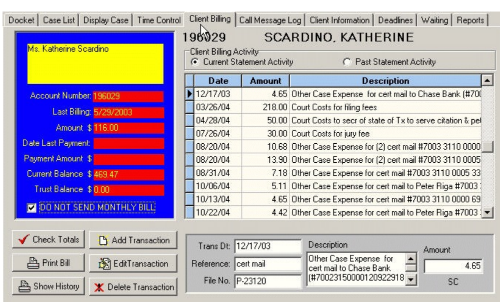


TIME CONTROL

By default, the "Time Control" screen will show the current time for the client for the selected casefile. However, you can display current time or archived time entries for any client or file. Select the appropriate time file, enter the search term in the edit control, and click on the client name, or file number. The buttons on the bottom of the screen will allow you to add, edit, or delete current time entries. You cannot edit or delete the archived time entries. The "Billing" and "Archive" buttons are used to move the current time entries.

Each button performs a slightly different function. The "Archive" button will send the entries directly to the archive time file when it removes them from the current time file. The "Billing" button will send the current time charges directly to the client's billing account before sending the information to the archived time database. You cannot access the "Billing" button unless you have password access to the billing portion of the program. Access is gained through checking "Billing Access" box in the Business Information set up as discussed when installing the program. The "Report Client Time" button will print a report of the time entries listed in the grid. The report will first be displayed on the screen where you will have the option to Print or Export the report. The "Report Day Time" will generate a report of the files listed in the time grid which shows how much time each staff member spent on the file each day. ** Note ** To list all time entered for multiple clients, enter a space in the edit field between the two hands and click on the client name list button.

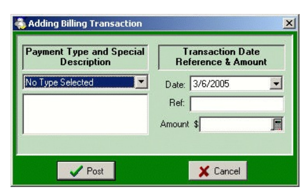




CLIENT BILLING

You cannot access the CLIENT BILLING screen if you do not have **password access**. Without the access, your view of all the information except the name will be blocked.

Assuming access, you will find all of the financial information concerning the current bill displayed by default for the client which has been selected on the "CASE LIST" screen. The grid will show the current entries and the window at the bottom will show the information for each of the entries that is highlighted in the grid. If the radio button for past statement activity is selected, the grid will display all of the billing entries that have been archived since the last "Monthly Bills" were printed and the billing file reset.



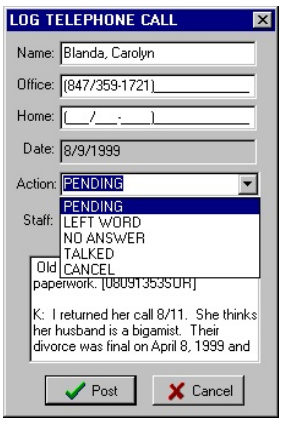
Notice the check box in the lower left hand corner of the dark blue information box. If this box is checked, the "Print Monthly Bills" selection will not print out this bill or reset its current time entries. This box cannot be checked at this screen. It can only be checked by double clicking "Client" on the "Case Display" Screen and then clicking on the "DO NOT SEND MONTHLY BILL TO CLIENT" box in the client edit screen.

You can add, edit or delete transactions from this screen as long as the entries shown in the grid are current entries. If you choose hourly transaction, you will be required to put in the hours and the rate, the program will compute the charge. The program also has provisions so that you can keep track of the trust funds deposited for fees and expenses. If you add a deposit to the trust, the entry will not affect the billing. If you give a credit from the trust, the program will show a credit against the billing charges, and deduct that amount from the current billing. Mistakes with trust balances, and trust deposits can only be corrected by the "Administrator" using CaseFix.exe.

The six buttons will not function when "Past Statement Activity" is shown. The button marked with a red checkmark is used to assure that the current and the past statement activity adds up to the statement total shown in the account information section. You can edit any selected statement activity by clicking the edit button or double clicking the entry.

You have two options for printing bills from this screen. The first "Print Bill" will print the same bill that would be printed by the monthly billing. It will contain the last statement balance, the new balance, and will list only the newly accrued charges and credits since the last monthly billing. It WILL NOT RESET the clients bill unless you choose that option when prompted by the program. The "Print History" button will print a bill and will print all of the current charges with a subtotal and also a list of all of the past activity in the archive file with a subtotal of that activity. The two totals should equal the balance due.

Once each month to send out all statements except those not designated for monthly billing, choose "Print Monthly Bills" under the "Billing" menu choice and reset the files when prompted, after checking to see that the bills printed correctly.



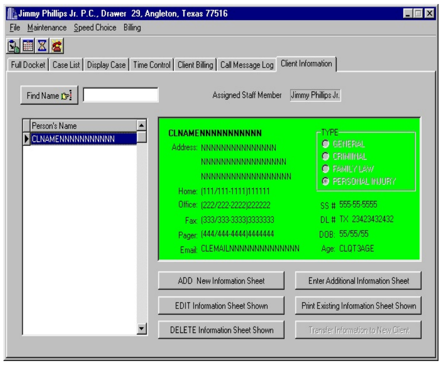
CALL MESSAGE LOG

The purpose of the call message log is to give you a written list of the calls which you have received to return or the calls you want to make on pending matters. Too many times, an attorney will want to make a call about some matter, then become distracted and fail to make the call until much later when he again remembers it.

A call can be added to the list in several places in the program. It can be added from: (1) The Telephone Directory (accessed by clicking the ringing telephone button at the top of the screen) and then clicking the telephone button shown on the Telephone Directory Screen; (2) Clicking the telephone shown on the "Case List" screen; (3) Clicking the "ADD" button on the Message Log Screen. The differences between the processes is the amount of information which is added by the program to the message list.

There are five actions that can be noted on the call: PENDING, LEFT WORD, NO ANSWER, TALKED, and CANCEL. PENDING is always the default action when the call is first added to the list. Whenever TALKED or CANCEL are chosen, the call is removed from the pending call list. It can be redisplayed when choosing "Full Call List" option. Each time action is taken on a call, a notation should be included as to what transpired. The date and time of the notation will automatically be included, which allows call tracking. The call displayed can be printed by clicking on the "Print Displayed Call" button. You can type your own message on the call for future reference and enter the call action from the "Print Displayed Call" screen. Typing a name in the lookup control will find that name on the call list and display that call.

At the end of each day select "Daily Call Reset". A list of the calls will be printed and then the completed calls will be removed and placed in the archived database. Although you can delete a call without going through the archive procedure, it is not advisable because the program will allow you to search the database for calls relating to the client and the files involved. The search is a keyword search, so be descriptive in the call comments.



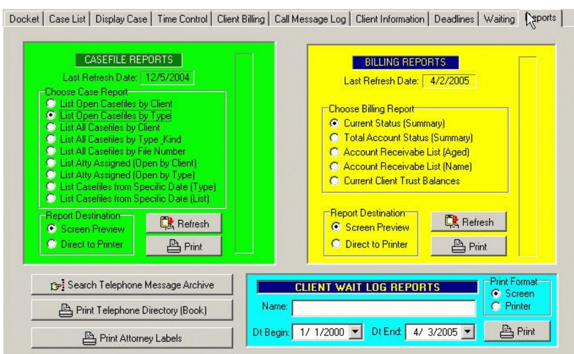
CLIENT INFORMATION

This portion of the program is available to fill out information on any potential client that contacts your office. There are four types of information sheets:

1. General
2. Criminal
3. Family Law
4. Personal Injury

Once completed, they furnish information for pleadings and other uses on the client's case.

Whether adding or editing an existing information sheet, the first screen you will see presents the general information for the client. Notice that it has a place where you select what kind of information sheet you are completing. It is important that if you are "Editing" an information sheet, be sure to check the same kind of information sheet that was previously completed. Because the same variables answer different questions on the different kinds of information sheets, the answers might look quite strange. Information from the client concerning name address and telephone number can be transferred to the client information when adding clients to the casefile list.

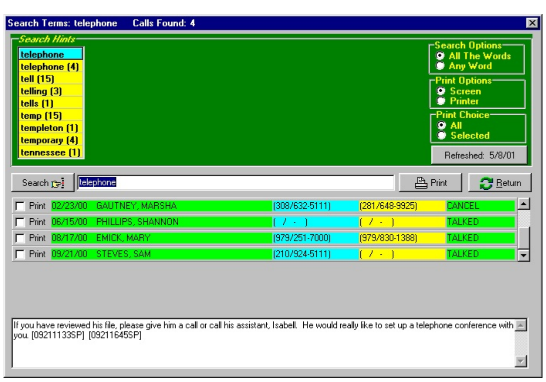


REPORTS

The report section has many detailed reports that you can print. Before you print the reports you should notice the last refresh date displayed. Because the reports are printed from a copy of the casefile data, you should have current information when printing the reports. Click on the "Refresh" button. This will insure that you have current reports. The date of the last refresh is displayed. You do not have to refresh as you print out each different type of reports. When you "Refresh" a copy of the existing database is made as it existed at the time of the refresh, for the reporting purposes. There is one for the casefile reports and one for the billing reports.

To print the report, select the Report Destination and then select the report you want. Click on "Print" and the report is generated.

The "Print Telephone Book" button will print a telephone book of all of the numbers in the casefile telephone directory. The "Print Attorney Labels" will print six blank labels for attorney information of the adverse attorneys and can be placed in the client's file folder for future reference. (Avery Label # 5164 Shipping Label) The remaining button, "Search Telephone Message Archive" will display a screen where you can search the past telephone calls for calls referencing certain key words.



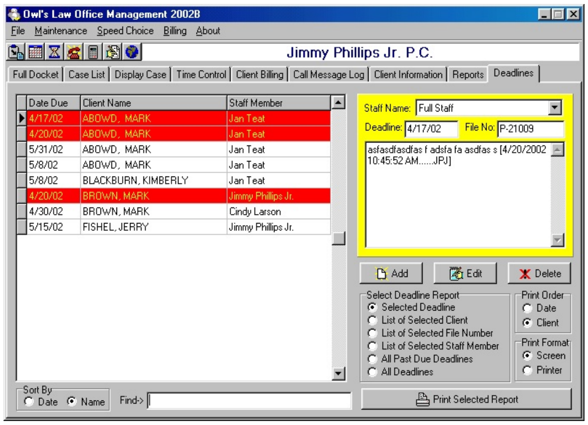
TELEPHONE SEARCH

This is where you can search for telephone calls by key words. First notice that there is a refresh button here. To have the most current data, be sure to refresh the data before beginning your search. Also notice that you can search for all the words typed or any of the words typed. Select the type of search you want. Select the format for the printed report.

In the edit control, enter the word or words that the message you are looking for contains. Notice that as you type, words are listed which contain the portion of the word you are typing. When finished with the key words, click on the

“Search” button and the calls that satisfy the search will be listed. As you highlight each call, the message is shown at the bottom of the screen.

Notice that small box on each line. Check the box with the mouse if you want that call printed when you choose “Selected” in the “Print Choice” radio button box. The “Return” button will take you back to the main program.

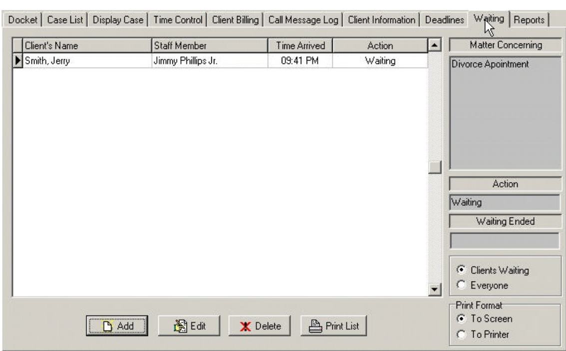


DEADLINES

The deadlines tab will display the deadlines which you have entered to remind you of things which have to be accomplished. The deadlines which are past due are shown in yellow and red. The deadlines to be accomplished in the future are show in black and white. If you have a deadline which is pastdue, you will be warned about it when the program starts and the deadline screen will be displayed instead of the “Case List” screen.

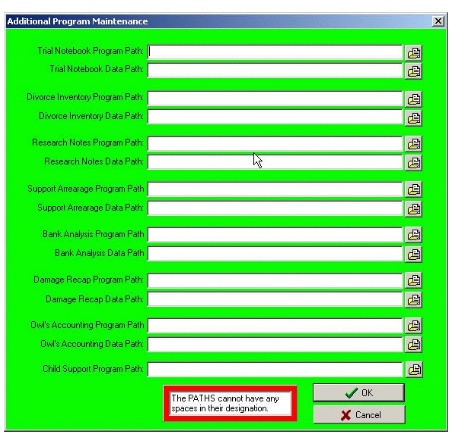
You can Add, Edit and Delete and Print deadlines from this screen. It is suggested that whenever you complete a deadline, that you use the option to print the deadline out when it is deleted so that you will have a reference for the file. Once a deadline is deleted, it cannot be recovered.

By using the Staff Name List, you can filter only the deadlines for that specific staff member. The choice “Full Staff” will display all of the deadlines. Also the deadlines can be sorted by date due or by client name. When sorted by client name, you can find a specific name by typing the name in the edit control at the bottom of the dialog box



CLIENT WAITING

The client waiting list allows you to use realtime listing of the persons who come into your office. The program keeps track of who came in, who they wanted to see, when they were there, and how long they waited. When they have seen the person they came to see, they will be removed from the list and added to the archive database. Later, the database can be searched for any person to see when and how many times they came into the office.

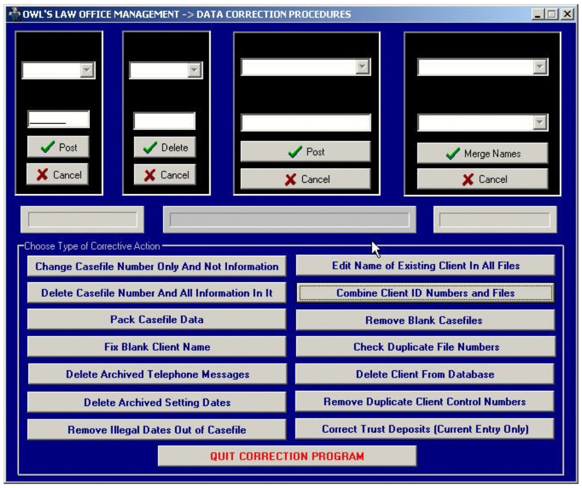


PROGRAMS

Choosing “Programs” and then “Program Maintenance” from the top menu allows you to run other owl programs directly from the Law Office Management Program. The advantage of doing this is that the program will create a file name for the file that is currently displayed, and open it in the data path that you have reserved for the data from that respective program. One Click and you are in the other owl program with the data for the displayed client showing.

All you have to do to set up the program is to enter the path to the program “exe” file, and then the path where you want the reports to be located. When this is done, the menu choice for that program when you choose “Programs” from the top menu.

CASEFIX.EXE



The program for correcting major casefile errors is accessible only by the casefile administrator. The use of any other password will not activate the program. Casefix.exe is located in the same directory as the program file. Double click on the icon or use run on the Start Menu to access the file. At the top of the casefile screen are four windows with black backgrounds. These windows are inactive until the corresponding button is selected with a mouse click. At that time, the background of the respective window will "turn on" and the button panel will become inactive until the procedure is completed. The buttons and their corrective actions are described below: Be sure that no other person is accessing the casefile data when you use this program.

Change Casefile Number Only and Not Information

This is used only when you want to change the number, but to leave all underlying information as it exists. Using the small down arrow in the first control, drop the list and select the file number that you wish to change. After it has been selected, enter the new number in the edit control. Remember that the number must contain the prefix and five numerical digits. Click on post when the file number is shown correctly.

Delete Casefile Number And All Information In It

Select this if you wish to delete the entire casefile to be chosen by its number. The casefile and all information that was shown on the display screen will be deleted and removed from the database. Select the file in the first control by using the small down arrow to display the list. The file to be deleted will be shown in the second edit control. Click on "Delete" and confirm the deletion. Once that the casefile number has been deleted, it cannot be recovered.

Pack Casefile Data

This will remove deleted files and attempt to correct defects in the database indexing information. Anytime that the program appears not to be properly finding the files, or the files appear to be "missing" some times, this should be tried before other things. It will never hurt your data to use this choice.

Delete Archived Telephone Messages

This will delete archived telephone messages that are so old that you will not need to access them anymore. All telephone records that are older than the date selected will be permanently removed from the telephone archive.

Delete Archived Setting Dates

This will delete archived setting records that are so old that you will not need to access them anymore. All setting records older than the date selected, will be permanently removed from the setting archive.

Remove Illegal Dates Out of Casefile

This should be used when you get an error that you have an illegal date entered.

Edit Name of Existing Client In All Files

This should be used where the name of the client needs to be changed, such as when it was misspelled, or the name was correct but the client later changed her name. Use the small down arrow to select the existing name. Type the corrected name in the edit control. Click on "Post" to make the entry. The procedure will change the name in all of the databases, but the client number (the client's accounting number) will remain the same.

Combine Client Id Numbers And Files

This procedure is more involved. It's purpose is to combine existing clients into one client's name and account number. It is used where one existing client has two different "client account numbers". When completed, the data from one of the files will be merged so that all of the same data exists, but it will reference only one name and client number. On the top control, select the name that will be the primary name. On the bottom control select the name that will be changed to the primary name and account number. Click on "Merge Names". When completed, the primary name will contain all of the entries and files of the Primary name and the merged name.

Remove Blank Casefiles

This will remove any files that have a blank file name and will also reset file numbers so that they contain five digits in addition to the caption.

Check Duplicate Numbers

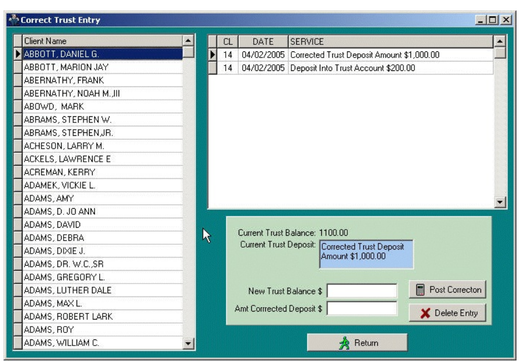
Duplicate file numbers should not exist in the database. However, this is a simple way to find out if they exist. The existence of duplicate numbers is not determinable by the ordinary program because of the indexing associated with the datafiles. Once detected, you will be allowed to change the number. Your change will change the number only. Continue clicking on this button until the check reveals that duplicate numbers do not exist any longer.

Delete Client From Database

This will totally remove the client from all references in the database. It is unusual to use this choice. However, it is available if for some reason you desire to purge the data of all references to the client.

Remove Duplicate Client Control Numbers

You cannot have duplicate client control numbers and have the program operate normally. This will find and repair any duplicate client control numbers which you have acquired in the database.



Correct Trust Deposits (Current Entries Only)

This is where you can correct trust deposits. You cannot correct a trust deposit that has been reset and sent to the archives. Select the name of the client. If there are any current trust deposits, they will appear on the right window. The selected deposit will appear in the blue window, and this is the one you can change. To change it, enter the amount of the deposit, and the corrected current trust balance. Choose "Post Correction" and the correction will be made. Return to the main program, and then exit.

QUIT CORRECTION PROGRAM

This will close the databases and the Casefix program.

INSTRUCTIONS FOR UPDATING DATA FROM A VERSION PRIOR TO VER. 2005

1. Backup your data files. (Make two copies to be sure)

2. Write down the path to the data files for the Law Office Management Files. (This is the path which has the file "Ocases.dbf" in it.)

3. Uninstall the program from the "Control Panel" ...."Add-Remove Programs" (This will not affect the data files or the files the old program has installed.

4. Put the disk into the cd rom drive and install the program in the normal fashion.

5. After installation, and before you start the Law Office Management Files, Select "Law Office Data Maintenance" from the Owl Program sub menu.

6. If the office data is not shown on the left hand side, select "Change Data Path" and enter the path you located in "2" above. Once located, the information will appear on the left hand side of the dialog.

7. Enter the administrator's password in the appropriate window under "Password".

8. Click on "Update Data (To 2005)"

9. When the conversion finishes, then click on "Install Work Station Files" and then "Close File Maintenance".

10. After that, your program should work normally with the new features.

11. To install additional workstation files, complete steps 3, 4, 5, 6 and 9. It is not necessary to update the data files again.

We at Owl Software hope that you are able to productively use this program. If you have any questions, do not hesitate to call on us.