



"The Perfect Blend of Process & Technology"

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Phone 855.822.4567

Fax 866.461.8236

2217 Helgason Drive

West Kelowna, BC V4T 2W9

Synergy Matters

File | Reports | Clients | Transactions | Scanned Docs | Fax | Personal Docs | Firm Docs | Firm Templates | My Work

Company/Surname/Matter/Issue Search (F3)

Search All Fields

Favorites  Active  Archived

Surname / Company	Given Names / Contact	File Number	Issue
DRAPES BY DESIGN LLP	Marilynne Malone	7177751	Lease Contract
LEGAL MATTERS SOFTWARE INC.	Marilynne Ryan	855 822 4567	Corporate Matters

# SYNERGY MATTERS

# QUICK USERS GUIDE

Matter Notes

Matter Contacts

Client Contacts

Open Docs Post Transaction Responsible Lawyer:

John





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Synergy Matters is a simple to use yet powerful interface to your entire client related electronic documents. We upgrade your existing client folder structure with a fast search capability to go directly to your client folders and provide efficient tools to perform various tasks. We attempted in our design to make the operation of the software to be intuitive and allow for a fast learning curve. To achieve maximum benefit from the software the only change we ask of you is to open your documents from the Synergy Matters interface rather than directly from a program. By default when you open Synergy Matters your view will be of your Favorites, to build this list simply right click a matter and add to favorites.

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To find a client, type in the box either Company/Surname/Matters #/ or Issue; the search is incremental from left to right within your “Favorites”, “Active” or “Archived” categories. Search all fields will include a full text search within “Matter notes”, “Matter Contacts”, and “Client Contacts”.

Synergy Matters

File | Reports | Clients | Transactions | Scanned Docs | Fax | Personal Docs | Firm Docs | Firm Templates | My Work Help

Company/Surname/Matter/Issue Search (F3)

Search All Fields   Favorites  Active  Archived

Surname / Company	Given Names / Contact	File Number	Issue
ACME NOVELTY COMPANY	Wiley Coyote	12121212	Wiley Coyote vs Sam Sheepdog
COMPLETE MAILING SOLUTIONS	John Ryan	717-8266	Corporate Filing
DRAPES BY DESIGN LLP	Marylynne Malone	7177751	Lease Contract
LEGAL MATTERS SOFTWARE INC.	Marylynne Ryan	855 822 4567	Corporate Matters
VIRTUAL BOTTOMLINE SYSTEMS (CA)	John Ryan	866 999 8236	Trademarks

**Matter Notes**

File opened 01/01/2013  
Docket number 2314567

**Matter Contacts**

Andersen, Erik M.  
Payne & Fears LLP  
(949) 797-1255 Work  
(949) 851-1212 Work Fax  
ema@paynefears.com  
4 Park Plaza  
Suite 1100  
Irvine, CA 92614  
United States of America  
<http://www.paynefears.com>

**Client Contacts**

Wiley Coyote  
1212 Cave Rd.  
Sorona Desert, AZ 98844  
Ph. 405 717 8266  
Fax 404 564 3134  
Mobile 545 666 7177  
[Mailto://w.coyote@acme.com](mailto:w.coyote@acme.com)

Responsible Lawyer: John

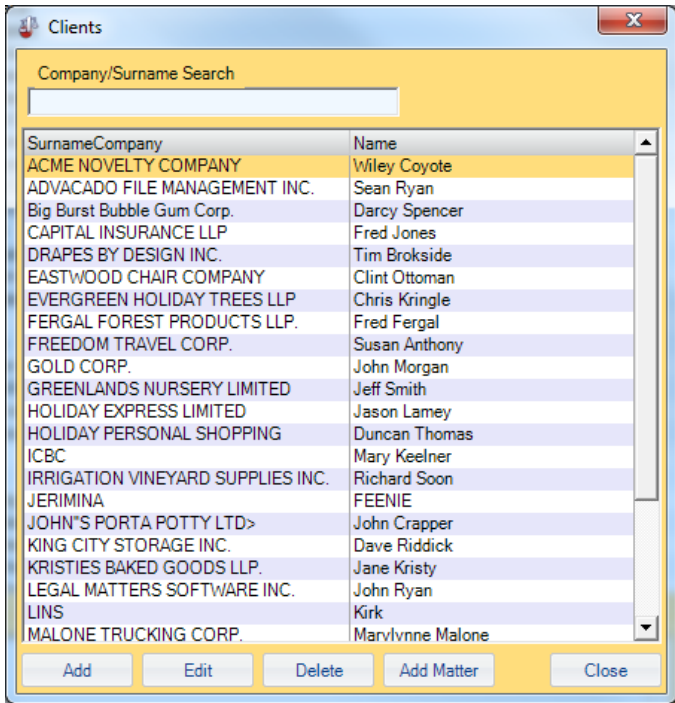
John





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Or right Click on a Client and the following screen appears

<ul style="list-style-type: none"> <li>Open Docs</li> <li>Add to Favorites</li> <li>Remove from Favorites</li> <li>Archive Matter</li> <li>De-Archive Matter</li> <li>Add Client</li> <li>Add Matter</li> <li>Edit Client/Matter</li> <li>Delete Matter</li> </ul>	<p>Open the Clients documents folder (Double clicking the client will also open the documents folder)</p> <p>Copy the Client into your "favorites" to create a list of your most used client Matters</p> <p>Remove from your favorite's list</p> <p>Archive and De-Archive moves the Client to and from the active list of Matters</p> <p>Delete Matter is only possible when all documents are removed from the matter's folder</p>
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### Add a Client and Matter

### Edit Client Name and Contact

### Add a Matter to an existing Client

Matter Notes, Matter Contacts and Client Contacts can be edited directly from the main screen and then you apply to keep the changes





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Opening the Docs folder for the Matter shows the following screen with the upper blue bar listing the Client, contact name, file number and the issue

Synergy Matters - DRAPES BY DESIGN LLP. Marylynne Malone 7177751 Lease Contract

File View Chronological View Search Scanned Docs Personal Docs Firm Templates Close

Convert to Pdf | Number Pdf Pages | Send as Email | Send as Fax | Copy to Clipboard | Paste from Clipboard

Name	Size	Type	Date Modifi...
CORRESPONDENCE-IN-OUT-CLIENT		File folder	14/02/2013 ...
CORRESPONDENCE-IN-OUT-OPPOSING COUNSEL		File folder	14/02/2013 ...
COURT DOCUMENTS & CORRESPONDENCE		File folder	14/02/2013 ...
OTHER 3RD PARTY CORRESPONDENCE-IN-OUT		File folder	14/02/2013 ...
Letterhead.doc	55.5 KB	Microsoft Word 97 - 2003 Doc...	19/02/2013 ...

File view is the default view and is the view most windows users are familiar with:





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Chronological View presents all files removed from folders in date order from newest to oldest and shows the folder that the file is contained within

Date Modified	Name	Folder
2012-10-17 21:49:59	20121017-FAX-OUT-Legal Matters Software Test Fax.pdf	correspondence-in-out-client
2012-10-17 17:01:26	20121017-FAX-OUT-Legal Matters Software test again.pdf	correspondence-in-out-client
2012-10-16 23:10:01	20121123-FAX-OUT-Cover 140035.doc	correspondence-in-out-client
2012-10-09 23:41:47	20121009-FAX-OUT-Cover 164136.doc	correspondence-in-out-client
2012-10-09 23:21:26	20121009-FAX-OUT-Cover 162116.doc	correspondence-in-out-client
2012-10-09 23:14:25	2009 Home inspection.pdf	correspondence-in-out-client
2012-10-05 22:14:00	20121005-FAX-OUT-Cover 151352.doc	correspondence-in-out-client
2012-10-05 21:55:47	07-00720121005-FAX-OUT-Cover 145536.doc	correspondence-in-out-client
2012-10-04 21:22:44	07-00720121004-FAX-OUT-Cover 142233.doc	correspondence-in-out-client
2012-10-03 21:06:12	1996 T4 .pdf	correspondence-in-out-client
2012-10-03 21:06:12	another scanned doc.pdf	correspondence-in-out-client
2012-10-01 20:55:15	Signed copy of contract.pdf	correspondence-in-out-client
2012-06-25 17:18:27	20120625-FAX-OUT-Cover 101822.doc	correspondence-in-out-client
2012-06-22 17:41:33	20120622-FAX-OUT-Cover 104127.doc	correspondence-in-out-client
2012-06-22 17:41:04	20120622-FAX-OUT-Cover 104059.doc	correspondence-in-out-client
2012-05-11 18:04:20	20121123-FAX-OUT-Cover 140023.doc	correspondence-in-out-client
2012-04-13 17:03:05	20100622-EMAIL-IN-Witness statements.eml	court documents & correspondence\plaintiff's exhibit book
2012-04-13 17:02:46	20080609-EMAIL-OUT-145246 copy of discovery.eml	correspondence-in-out-opposing counsel
2012-04-13 17:02:45	20080609-EMAIL-OUT-145146 client communication.eml	correspondence-in-out-client
2012-04-13 17:02:44	20080817-EMAIL-OUT-103522 retainer.eml	correspondence-in-out-client

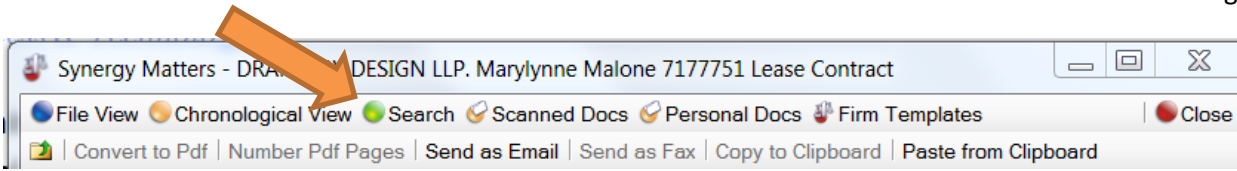




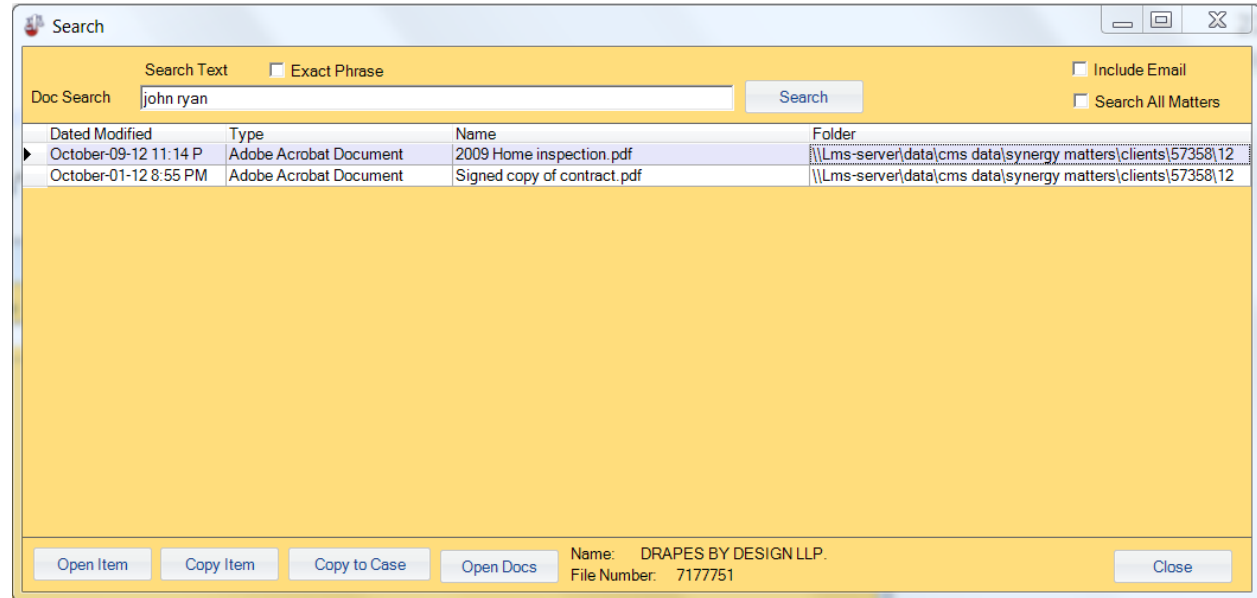
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The search button within “docs” allows for the full text search of all the content of documents including PDF’s.



Multiple words in the search box are treated as an AND Eg only documents with both john and ryan in the name of the document or in the contents will be returned within this matter. Checking off “Exact Phrase” will only return documents with “john ryan” , the search can be expanded to include email and or Search all Matters.



Once found you can open the document by clicking the open item or by double clicking the name. If the document is not contained within this matter the matter name and the file number is displayed on the bottom of the screen. Options to “Copy Item” or “Copy to Case” are available to the user. You can also “Open Docs” of the matter where that the document is contained.



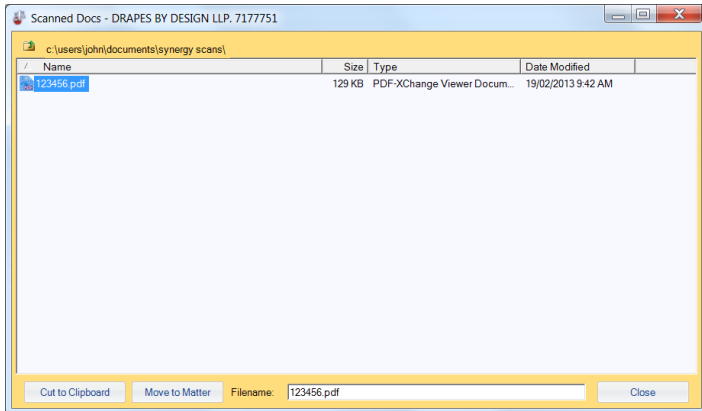




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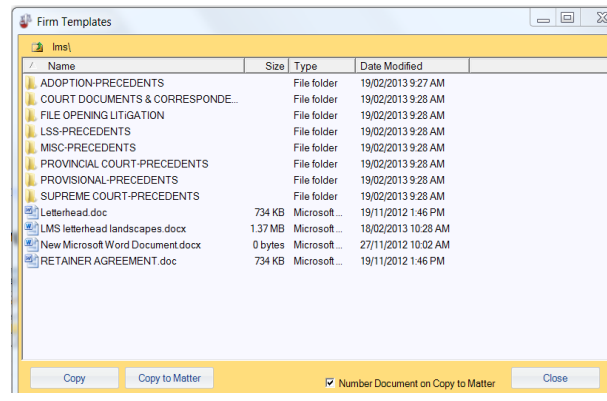
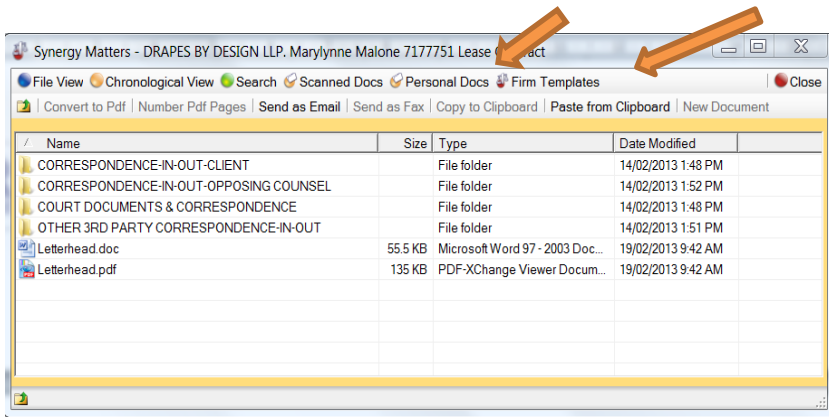
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When you have a Matter’s Doc’s open clicking on the Scanned Docs button opens the following window.



By clicking on the file you can “Move To Matter” this scanned doc to the various Matter’s folders. For confirmation the name of the Client and the file number appears at the top of the screen.

With a Matter’s Docs opened Clicking on either Personal Docs or Firm Templates opens the following folders and documents.



Firm Templates are accessible to everyone; Personal Docs are only available to the user. Once highlighted, a copy can be moved to the matter and a unique identification number can be inserted into the footer of the document by default.

Files can be added or removed from these repositories like any normal windows folder. A copy to Matter will make a copy of document and move it to the Matter folder keeping the same name. By default a unique number will be added to the footer of the document.

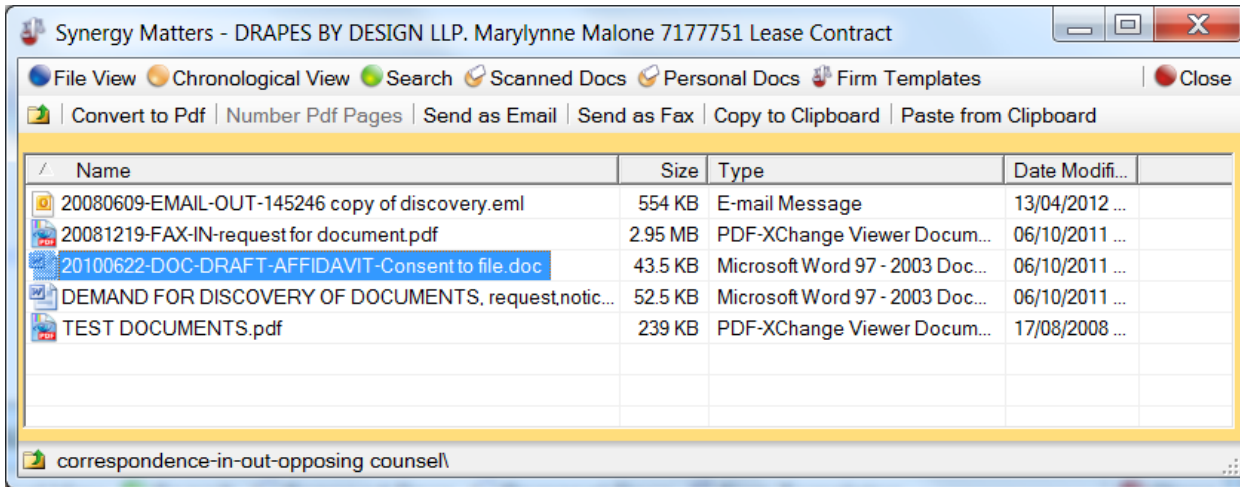




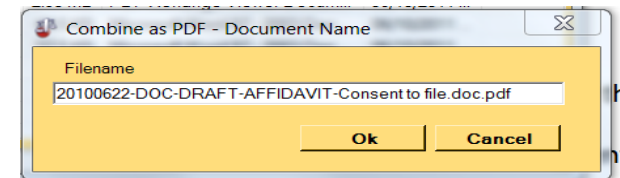
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Once a document is selected in the Matter file various options are available for the user. In this instance for the word document selected the user can “Convert to PDF”, “Send as Email”, or “Send as Fax”. The Convert to PDF will convert a single word document to PDF without having to open the doc.

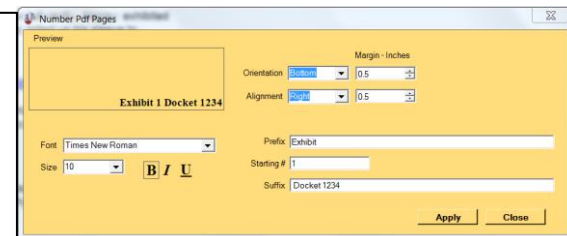


If you select more than one document and they are of the right type, our software assumes that you want to merge the documents and convert to PDF. The order of the documents will be the same as the order that they were selected. A window will pop up for you to name the merged document.



Selecting 2 PDF documents and pressing convert to PDF will also merge the documents.

The **Number Pdf Pages** Button allows users to uniquely number individual PDF pages. In this example the bottom right of each page will be labeled with Exhibit “an incrementing page number starting with 1” Docket 1234 As shown in the upper left hand box





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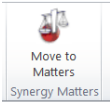
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Email: Selecting Files and then selecting the **Send as Email** button will open up your Outlook email client and attach the file to your email. When an email originates from the Matters “Docs” a copy of the sent email will automatically be saved in the originating folder. The name of the file will be as follows “OUT” followed by the recipient(s) and the subject line; the size and dates are also contained on the name line. If multiple emails are sent to the same person with the exact same subject line an incrementing number in brackets will be added after the subject (2)

✉ OUT johnryan@shaw.ca Jones VS Jones.msg	55.5 KB	Outlook Item	19/02/2013 ...
---	---------	--------------	----------------

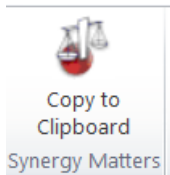
In Outlook the following button will allow you to move any Email directly into a client



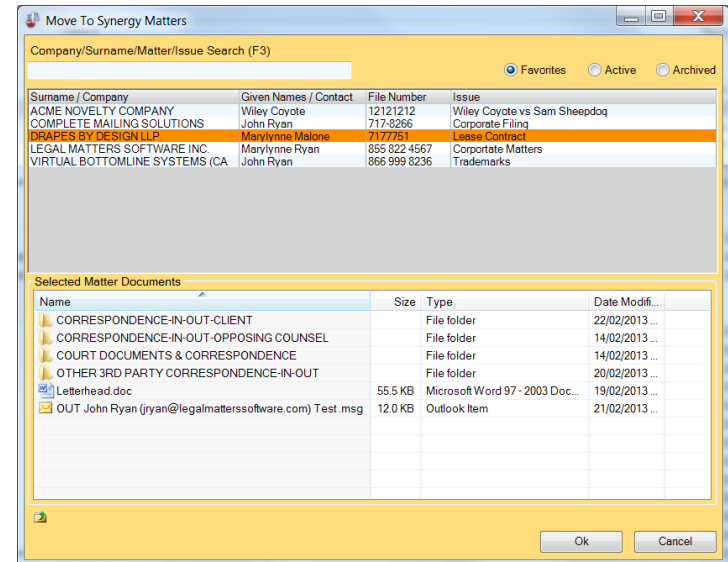
folder and if you select it into a sub folder

When you send an email directly from Outlook you will be prompted to save the sent email into a Matter’s folder

Outlook Contact Information: In your Outlook Contacts select you contact and push the



Button you then can go to the Matter Contacts, or Client Contacts and using “Cntl” v paste the information in to the box. Then apply to keep the information.

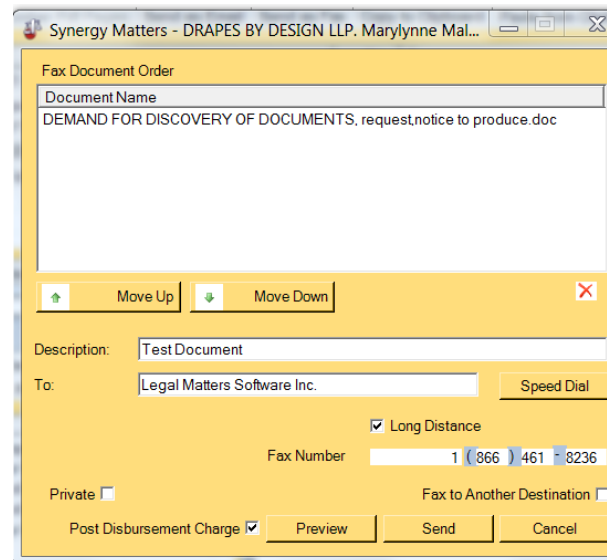
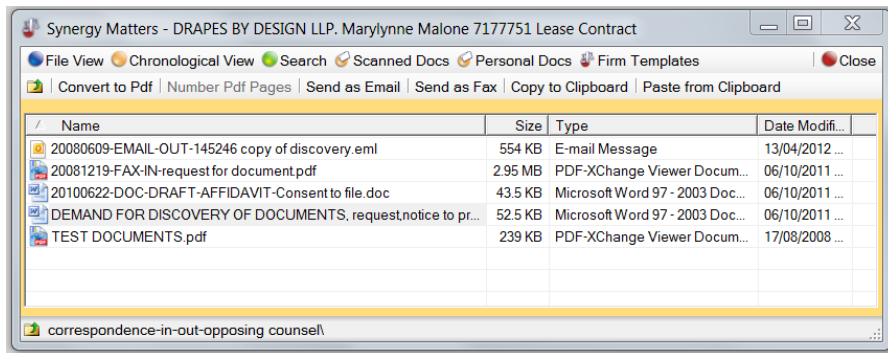




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### Sending faxes from a Matter's Docs.

In this example the file “DEMAND FOR DISCOVERY OF DOCUMENTS” file has been selected to be faxed. The send fax window opens with the document(s) to be faxed appearing in the “Fax Document Order” window. The order of the documents can be moved up or down to get the desired order. Documents will appear in this window in the same order that they are selected from the file. The description should be filled out as this will help identify the fax in the list of faxes in this matter. The naming convention used for the completed faxes will be the date year month day FAX-OUT- whatever is in the “To:” box followed by whatever is in the “Description:” box. Once the fax is successfully sent, a copy of the entire fax, along with the proof of service on every page will be automatically saved in the matter’s folder.



Additional features are to mark the fax “Private” so only the sender can see the completed document in the fax library. Ability to capture a disbursement charge, and preview the fax before it is sent. “Fax to Another Destination” will retain the original fax and for sending it to another number.





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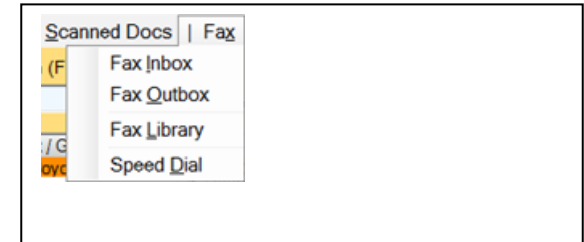
From the main screen if a fax is received it will show up here: Clicking on the FAX will open the following menu

Home | Reports | Clients | Transactions | Scanned Docs | **Fax(1)** | Personal Docs | Firm Docs | Firm Templates | My Work

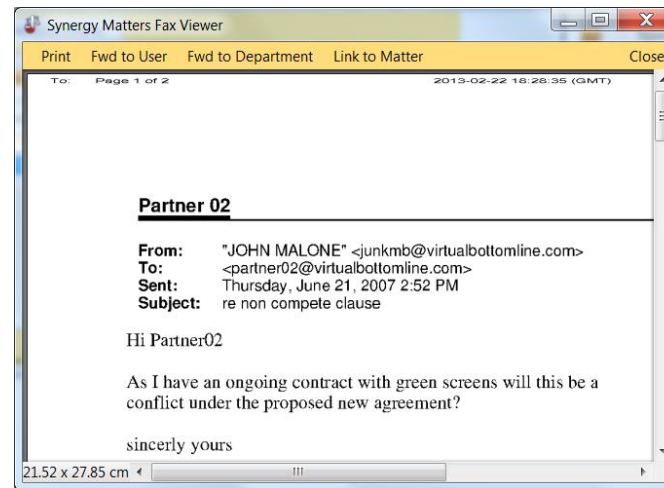
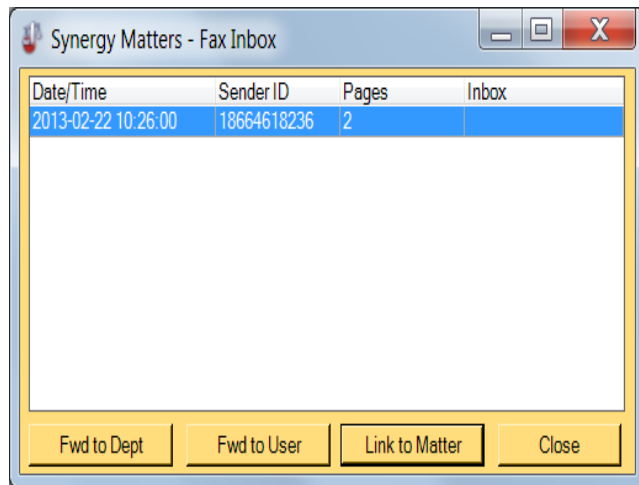
Company/Surname/File Number/Issue Search (F3)

Search All Fields    Search Documents

Company / Surname	Contact / Given Names	File Number	Issue
THE NOVELTY COMPANY	Wiley Coyote	12121212	Wiley Coyote vs Sam Sheepdog
COMPLETE MAILING SOLUTIONS	John Ryan	717-8266	Corporate Filing
MADES BY DESIGN LTD	Malcolm Malone	7177751	Lease Contract



Double clicking on a fax in the inbox will open up the fax and give you the option to, Print” forward to a User or Department or link directly to a matter.





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**My Work:**

My work is a unique event driven tool for capturing your time. Once you open a Matters Docs folder a timer is started, and the time that the Docs folder is opened will be recorded in my work. A description of the activity that has occurred, such as, creating a document, opening a document, or sending an emailing is recorded. (Note if no activity happens then the time is not recorded) The events are displayed in the Work –Events dialogue box as each item is highlighted. My work is displayed from earliest to latest occurrence.

In this example you can see the client “Drapes by Design” Docs folder was opened for .4 hours and in the events box we see the activity that occurred in that time frame. Two documents were opened and a form 5 AFFIDAVIT was created. If you are satisfied with this time transaction you can simply select post and this item will be sent over to Transactions to be uploaded to your billing system. If you wish to edit or delete simply select that option.

Transactions - LEGAL MATTERS SOFTWARE INC. Marylynn Ryan 855 822 4567 Corporate Matters

Date/Time	Surname/Company	Given Names/Cont	File Number	Issue	Description	Type	Explanation	User	Rate	Quantity	Charge
Feb 19 2013 04:52:52	DRAPES BY DESIGN L	Marylynn Malone	7177751	Lease Contract	Worked on Matt	Chargeable Tim		john	\$275.00	1.5	\$412.50
Feb 20 2013 01:10:35	DRAPES BY DESIGN L	Marylynn Malone	7177751	Lease Contract	Worked on Matt	Chargeable Tim		john	\$275.00	.4	\$110.00
Feb 20 2013 01:38:10	ACME NOVELTY COM	Wiley Coyote	12121212	Wiley Coyote vs Sa	Worked on Matt	Chargeable Tim		john	\$275.00	1.1	\$302.50
Feb 20 2013 01:40:30	LEGAL MATTERS SOF	Marylynn Ryan	855 822 4567	Corporate Matters	Worked on Matt	Chargeable Tim		john	\$275.00	.1	\$27.50
Feb 20 2013 01:41:12	LEGAL MATTERS SOF	Marylynn Ryan	855 822 4567	Corporate Matters	Worked on Matt	Chargeable Tim		John	\$275.00	.1	\$27.50
Feb 20 2013 01:41:56	ACME NOVELTY COM	Wiley Coyote	12121212	Wiley Coyote vs Sa	Worked on Matt	Chargeable Tim		John	\$275.00	.1	\$27.50

Work - Events

Date/Time	Event Type	Description
Feb 20 2013 01:10:43	Opened Docum	20090201-FAX-IN-Witness report.pdf
Feb 20 2013 01:14:32	Created Docum	FORM 5 AFFIDAVIT OF PERSONAL SERVICE.doc
Feb 20 2013 01:36:28	Opened Docum	FORM 5 AFFIDAVIT OF PERSONAL SERVICE.doc

Buttons: Edit, Delete, Post, Post All

Chargeable Time Hours: 3.3

Total Charges: \$907.50

Buttons: Refresh, Close





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Synergy Matters - Print Watch: Is your print tracking program whenever you print this screen will pop up and you must select the account to charge to. By default we will populate with whatever Matter that you have opened. If you don't have a matter opened the account can be found by typing in any of the main information. If you are printing multiple copies you need to select the number of sets of copies that you have done.

Company/Surname/Matter/Issue Search (F3)

Surname / Company	Given Names / Contact	File Number	Issue
DRAPES BY DESIGN LLP.	Marylyne Malone	7177751	Lease Contract

Synergy Matters - Print Watch # of Copies  Admin Ok

