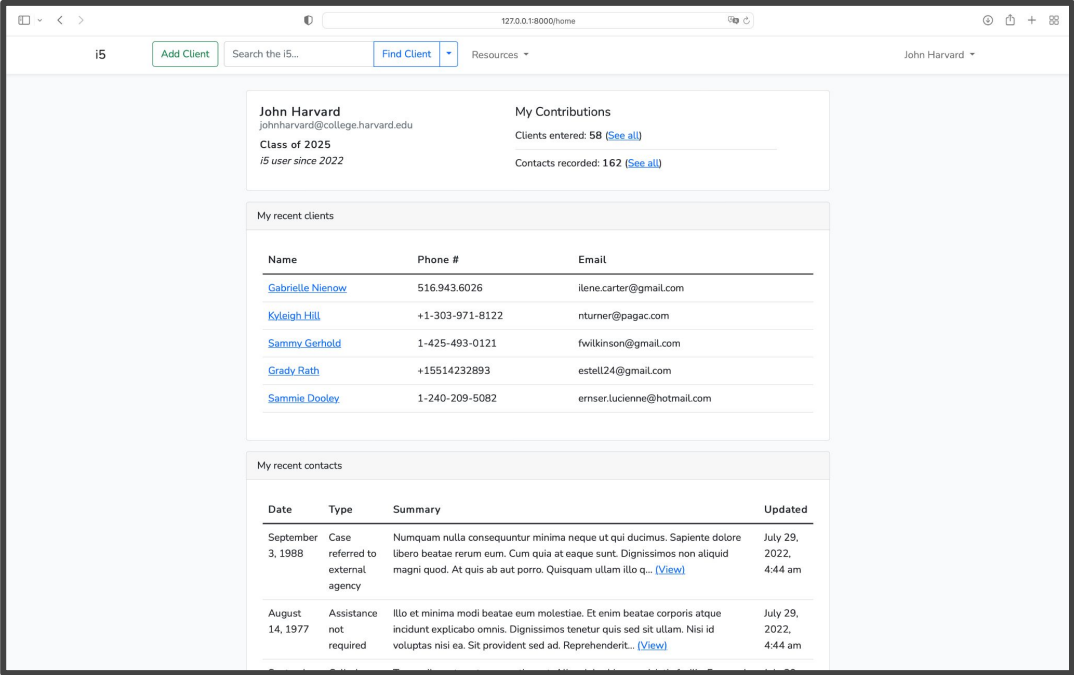


i5 User Guide

Dashboard

Here you can track your progress, view recent clients and contacts, and your overall contributions.

Note for previous i4 users: you may see your progress is not completely up to date: we are in the process of moving previous cases and clients over.



Searching Clients

Before adding a client, go ahead and look them up using the search bar.

You can search by name (firstname *or* lastname *or* firstname last name *or* lastname, firstname), by phone number, or by email.

Use the dropdown menu if you would like to limit the search to only one mode. By default it will search name, phone number, and email for matches.

The screenshot shows a web application interface for searching clients. At the top, there is a search bar with the text "127.0.0.1:8000/client/search?q=" and a "Find Client" button. Below the search bar, there is a dropdown menu with options: "By Name", "By Email", and "By Phone". The main content area displays a table of client results. The table has columns for Name, PH, Email, Language, and State. The results are sorted by "Most Recent" and "Most Urgent".

Name	PH	Email	Language	State
Gabrielle Niessow	51	ilene.carter@gmail.com	English	MA
Kyleigh Hill	+1	nturner@pagac.com	English	MA
Sammy Gerhold	1-425-493-0121	fwilkinson@gmail.com	English	MA
Grady Rath	+15514232893	estell24@gmail.com	English	MA
Sammie Doojev	1-240-209-5082	ernser.lucienne@hotmail.com	English	MA
Abbie Homenick	1-534-610-3135	rheidenreich@mcclure.biz	English	MA
Bulah Legros	+1 (260) 737-9319	volkman.catharine@heidenreich.com	English	MA
Reinhold Stamm	+1.458.816.8671	howe.gerry@prosaacco.com	English	MA
Wilhelmine Breitenberg	+1-832-944-2826	webster.jacobs@gmail.com	English	MA
Kara Hansen	407.835.5926	kenna21@hauck.net	English	MA
Okey Doyle	1-680-625-8951	madalyn.fadel@yahoo.com	English	MA
Alaetha McKenzie	+1-321-679-7862	filberto41@hagenes.com	English	MA
Thora Durgan	814.900.6096	rodriguez.curtis@erdman.com	English	MA
Preston Rice	+1-213-760-4966	vance.rosenbaum@wilkinson.com	English	MA
Alfonso Christiansen	+1 (402) 610-5075	dante.swift@stokes.org	English	MA

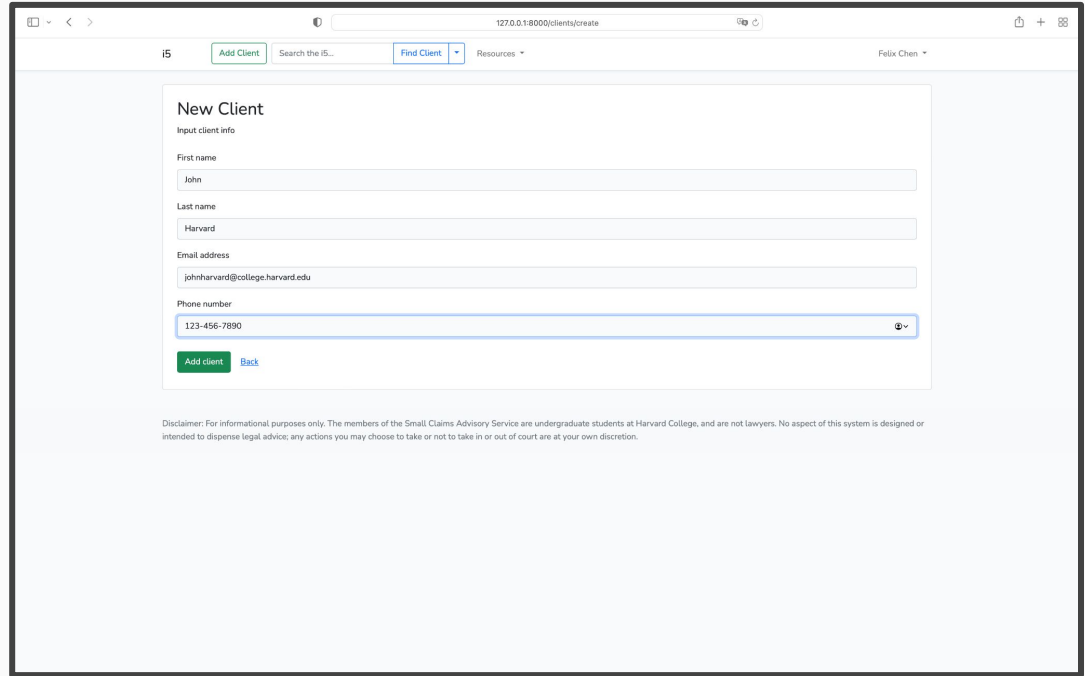
Showing 1 to 15 of 100 results

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Adding Clients

If you find a client, you can click on their name, which will take you to their information page.

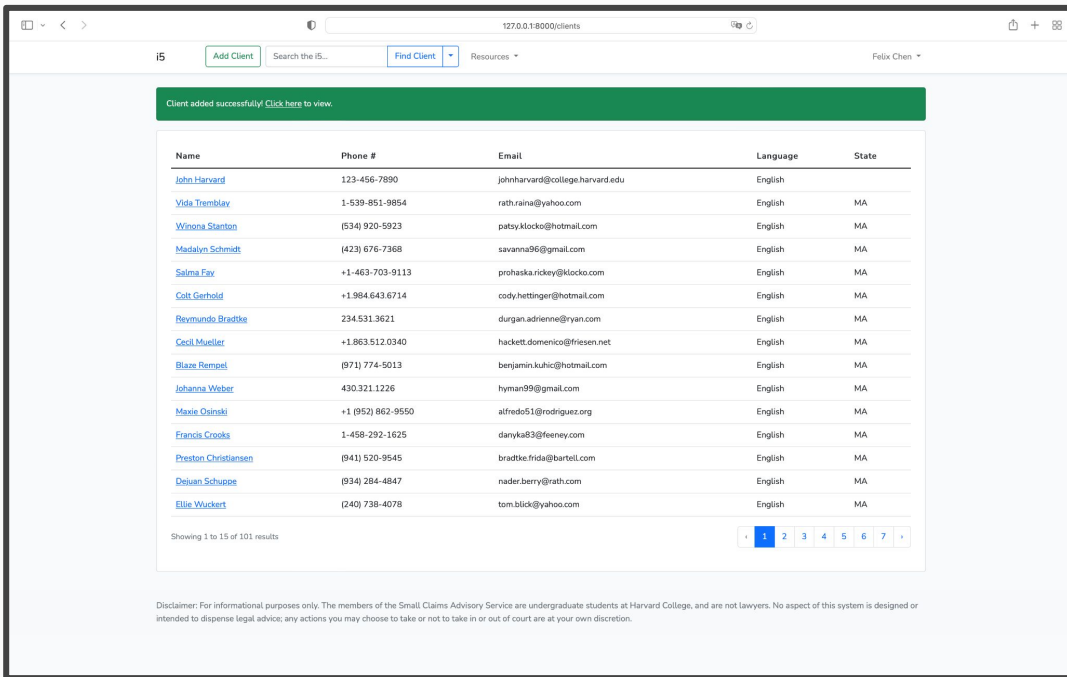
If you don't see the client's existing entry, you can click **Add Client** on the navigation bar on top to input their information.



The screenshot shows a web browser window with the URL `127.0.0.1:8000/clients/create`. The page has a navigation bar at the top with the text "i5" on the left, and buttons for "Add Client", "Search the i5...", "Find Client" (with a dropdown arrow), and "Resources" on the right. The user's name "Felix Chen" is displayed in the top right corner. The main content area is titled "New Client" and contains a form for "Input client info". The form has four input fields: "First name" (containing "John"), "Last name" (containing "Harvard"), "Email address" (containing "johnharvard@college.harvard.edu"), and "Phone number" (containing "123-456-7890" with a country code dropdown set to "US"). At the bottom of the form are two buttons: "Add client" (green) and "Back" (blue). Below the form, a disclaimer states: "Disclaimer: For informational purposes only. The members of the Small Claims Advisory Service are undergraduate students at Harvard College, and are not lawyers. No aspect of this system is designed or intended to dispense legal advice; any actions you may choose to take or not to take in or out of court are at your own discretion."

Adding Clients

After doing so, it will take you back to the clients page, with a message that the client entry has been started. To view, use the [Click here](#) link.



The screenshot shows a web application interface for managing clients. At the top, there's a navigation bar with a search bar and buttons for 'Add Client' and 'Find Client'. Below the navigation bar, a green banner displays the message: 'Client added successfully! [Click here to view.](#)'. The main content area features a table with columns for Name, Phone #, Email, Language, and State. The table lists 15 clients, with the first client being John Harvard. At the bottom of the table, there's a pagination control showing 'Showing 1 to 15 of 101 results' and a set of numbered links (1, 2, 3, 4, 5, 6, 7).

Name	Phone #	Email	Language	State
John Harvard	123-456-7890	john.harvard@college.harvard.edu	English	
Yida Tremblay	1-539-851-9854	rath.raina@yahoo.com	English	MA
Winona Stanton	(534) 920-5923	patsy.klock@hotmail.com	English	MA
Madalyn Schmidt	(423) 676-7368	savanna96@gmail.com	English	MA
Selma Fay	+1-463-703-9113	prohaska.rickey@klocko.com	English	MA
Cott Gerhold	+1-984-643-6714	cody.hettinger@hotmail.com	English	MA
Reymundo Bradtke	234-531-3621	durgan.adrienne@ryan.com	English	MA
Cecil Mueller	+1-863-512-0340	hackett.domenico@friesen.net	English	MA
Blaze Rempel	(971) 774-5013	benjamin.kuhic@hotmail.com	English	MA
Johanna Weber	430-321-1226	hyman99@gmail.com	English	MA
Maxie Osinski	+1 (852) 862-9550	alfredo51@rodriguez.org	English	MA
Francis Crooks	1-458-292-1625	danyka83@feeney.com	English	MA
Preston Christiansen	(941) 520-9545	bradtke.frida@bartell.com	English	MA
Dejuan Schuppe	(934) 284-4847	nader.berry@rath.com	English	MA
Ellie Wuckert	(240) 738-4078	tom.blick@yahoo.com	English	MA

Showing 1 to 15 of 101 results

1 2 3 4 5 6 7

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Adding Clients

This will lead you to the page for that specific client.

Here you can update any necessary details for the client. Be sure to click the **Edit client** button for your changes to save.

At the bottom of the client page will be a summary of past contacts with this client. If there are none, only the **Record contact** button will appear.

The screenshot displays a web application interface for managing clients. The browser address bar shows the URL `127.0.0.1:8000/clients/101`. The page title is "15" and the user is logged in as "Felix Chen". The main content area is titled "Client Info" and contains a form for editing client details. The form includes fields for Client ID (101), First name (John), Last name (Harvard), Email address (johnharvard@college.harvard.edu), Phone number (123-456-7890), Language (English), Address 1 (1234 Main St), Address 2 (Apartment, studio, or floor), City, State (dropdown), ZIP Code, Category (None Selected), Case Type (Never been contacted), and Referral Source (None Selected). At the bottom of the form are buttons for "Edit client" and "Back to all clients". Below the form is a section titled "Contact History" with the message "No contacts recorded yet." and a "Record contact" button. A disclaimer at the bottom states: "Disclaimer: For informational purposes only. The members of the Small Claims Advisory Service are undergraduate students at Harvard College, and are not lawyers. No aspect of this system is designed or intended to dispense legal advice; any actions you may choose to take in or out of court are at your own discretion."

Client Info

Client ID: 101 First name: John Last name: Harvard

Email address: johnharvard@college.harvard.edu Phone number: 123-456-7890 Language: English

Address 1: 1234 Main St

Address 2: Apartment, studio, or floor

City: State: ZIP Code:

Category: None Selected Case Type: Never been contacted Referral Source: None Selected

[Edit client](#) [Back to all clients](#)

Contact History

No contacts recorded yet.

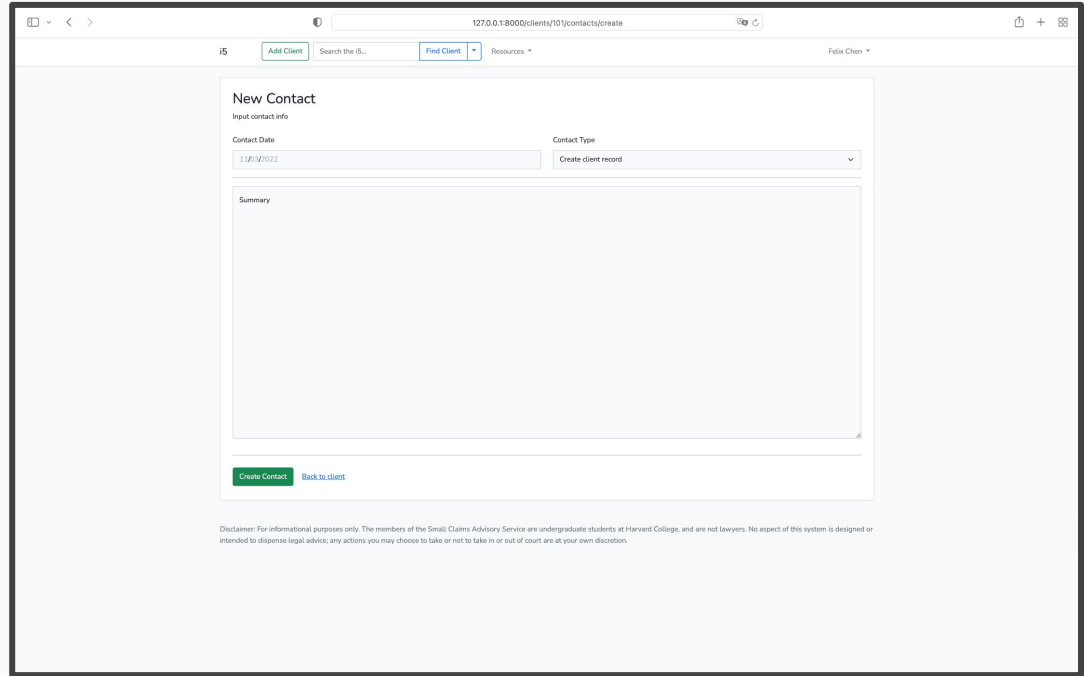
[Record contact](#)

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Adding Contacts

Clicking **Record contact** button will take you to the new contact page.

Here you can input the contact date, type of contact, and a summary of the contact.



The screenshot shows a web application interface for creating a new contact. The browser address bar displays the URL `127.0.0.1:8000/clients/10/contacts/create`. The page header includes a navigation bar with a search bar, a "Find Client" button, and a "Resources" dropdown. The main content area is titled "New Contact" and contains a form for inputting contact information. The form has two sections: "Input contact info" and "Summary". The "Input contact info" section includes a "Contact Date" field with the value "11/11/2022" and a "Contact Type" dropdown menu with the value "Create client record". The "Summary" section is a large text area for entering a summary of the contact. At the bottom of the form, there are two buttons: "Create Contact" and "Back to client". A disclaimer is visible at the bottom of the page, stating: "Disclaimer: For informational purposes only. The members of the Small Claims Advisory Service are undergraduate students at Harvard College, and are not lawyers. No aspect of this system is designed or intended to dispense legal advice; any actions you may choose to take or not to take in or out of court are at your own discretion."

127.0.0.1:8000/clients/10/contacts/create

i5 Add Client Search the (S... Find Client Resources Felix Chen

New Contact

Input contact info

Contact Date 11/11/2022 Contact Type Create client record

Summary

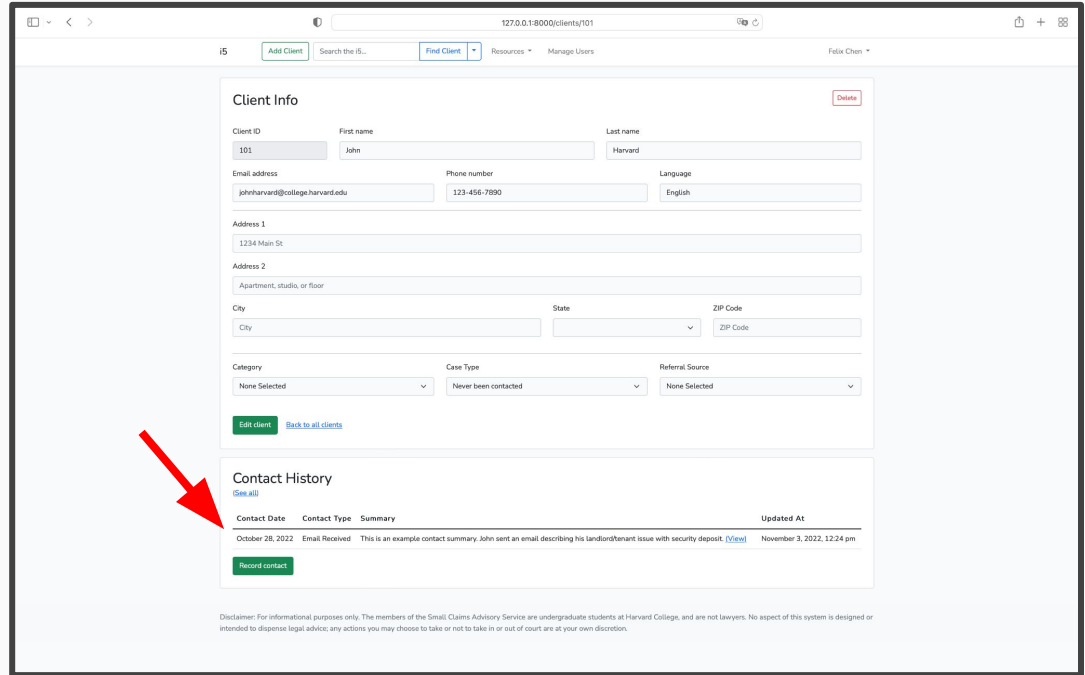
Create Contact Back to client

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Adding Contacts

After clicking Create Contact, you will be returned to the client page, where you can add more contacts or edit any previously entered information. The newly entered contact summary should appear at the bottom of the page.

This progress will also appear on your dashboard, in case you want to quickly return to your previous work the next time you log in to the i5.



The screenshot shows the i5 Client Info and Contact History page. The Client Info section contains fields for Client ID (101), First name (John), Last name (Harvard), Email address (johnharvard@college.harvard.edu), Phone number (123-456-7890), Language (English), Address 1 (1234 Main St), Address 2 (Apartment, studio, or floor), City, State, and ZIP Code. Below these fields are dropdown menus for Category (None Selected), Case Type (Never been contacted), and Referral Source (None Selected). A red arrow points to the 'Record contact' button in the Contact History section. The Contact History section shows a table with columns for Contact Date, Contact Type, Summary, and Updated At. The table contains one entry: October 28, 2022, Email Received, This is an example contact summary. John sent an email describing his landlord/tenant issue with security deposit. (View), November 3, 2022, 12:24 pm. A 'Record contact' button is located below the table.

Client Info

Client ID: 101, First name: John, Last name: Harvard

Email address: johnharvard@college.harvard.edu, Phone number: 123-456-7890, Language: English

Address 1: 1234 Main St, Address 2: Apartment, studio, or floor

City: , State: , ZIP Code:

Category: None Selected, Case Type: Never been contacted, Referral Source: None Selected

Edit client, Back to all clients

Contact History

Get all

Contact Date	Contact Type	Summary	Updated At
October 28, 2022	Email Received	This is an example contact summary. John sent an email describing his landlord/tenant issue with security deposit. (View)	November 3, 2022, 12:24 pm

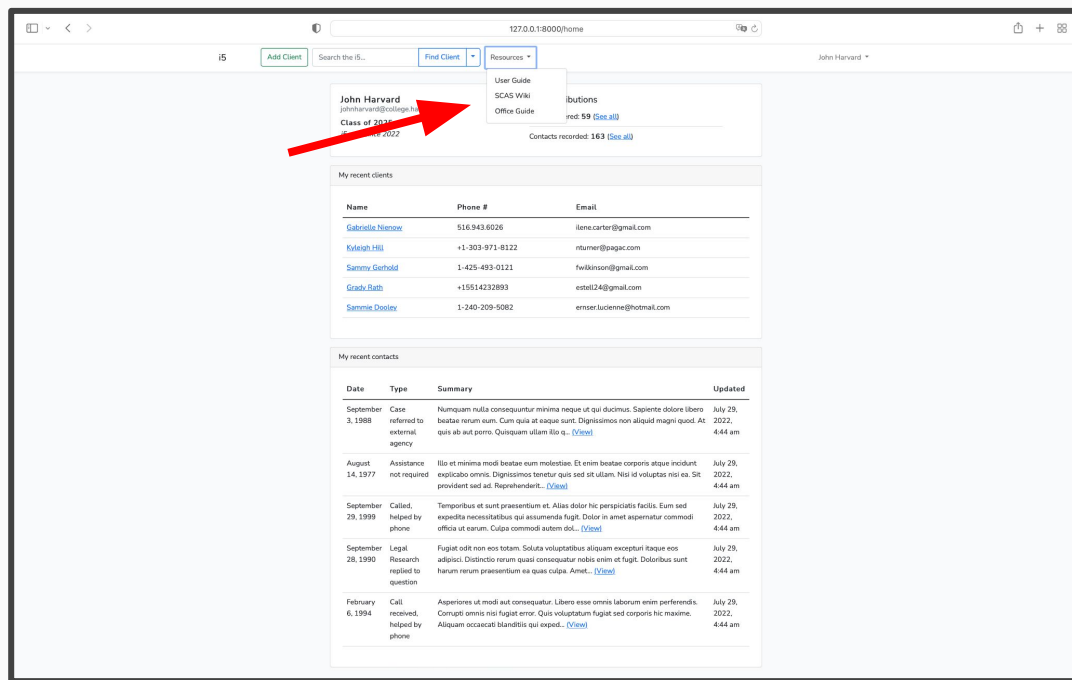
Record contact

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Resources

On the top navigation bar, you can quickly reference the **Resources** dropdown list, which includes the following:

1. User Guide, a link to this presentation
2. SCAS Wiki, wiki.masmallclaims.org, where you can look up small claims law
3. Office Guide, which explains the proper response process for volunteers



The screenshot shows the masmallclaims.org website interface. At the top, there is a navigation bar with a search bar and a "Resources" dropdown menu. A red arrow points to the "Resources" dropdown, which is open, showing the following options: "User Guide", "SCAS Wiki", "Office Guide", and "Contributions". Below the navigation bar, there is a section for "John Harvard" with a "Class of 2022" and "Class of 2022" link. Below this, there is a table titled "My recent clients" with columns "Name", "Phone #", and "Email". The table lists five clients: Gabrielle Nicolson, Kyleigh Hill, Sammy Gehlold, Grady Roth, and Sammie Doolley. Below the table, there is a section titled "My recent contacts" with a table showing contact history. The table has columns "Date", "Type", "Summary", and "Updated". The table lists five contacts: September 3, 1988 (Case referred to external agency), August 14, 1977 (Assistance not required), September 29, 1999 (Called, helped by phone), September 28, 1990 (Legal Research replied to question), and February 6, 1994 (Call received, helped by phone).

Name	Phone #	Email
Gabrielle Nicolson	516.943.6026	ilene.carter@gmail.com
Kyleigh Hill	+1-303-971-8122	rtuner@pagac.com
Sammy Gehlold	1-425-493-0121	fwilkinson@gmail.com
Grady Roth	+15514232893	estell24@gmail.com
Sammie Doolley	1-240-209-5082	entser.lucienne@hotmail.com

Date	Type	Summary	Updated
September 3, 1988	Case referred to external agency	Nunquam nulla consequuntur minima neque ut qui duisimus. Sapiente dolore libero beatae rerum eum. Cum quia at eaque sunt. Dignissimos non aliquid magni quod. At quis ab aut porro. Quisquam ullam illo q... View	July 29, 2022, 4:44 am
August 14, 1977	Assistance not required	Illo et minima modi beatae eum molestias. Et enim beatae corporis atque incidunt explicabo omnis. Dignissimos hendrerit quis sed sit ullam. Nisi id voluptas nisl ea. Sit provident sed aut. Reprehenderit... View	July 29, 2022, 4:44 am
September 29, 1999	Called, helped by phone	Temporibus et sunt praesentium et. Aliis dolor hic perspiciatis facilis. Eum sed expedita necessitatibus qui assumenda fugit. Dolor in amet aspernatur commodi officia ut eorum. Culpa commodi autem dol... View	July 29, 2022, 4:44 am
September 28, 1990	Legal Research replied to question	Fugiat odit non eos totam. Soluta voluptatibus aliquam excepturi itaque eos adipisci. Distinctio rerum quasi consequatur nobis enim et fugit. Doloribus sunt harum rerum praesentium ea quas culpa. Amet... View	July 29, 2022, 4:44 am
February 6, 1994	Call received, helped by phone	Asperiores ut modi aut consequatur. Liberos esse omnis laborum enim perferendis. Consequat omnis nisl fugiat error. Quis voluptatum fugiat sed corporis hic maxime. Aliquam occaecati blanditiis qui expedit... View	July 29, 2022, 4:44 am