

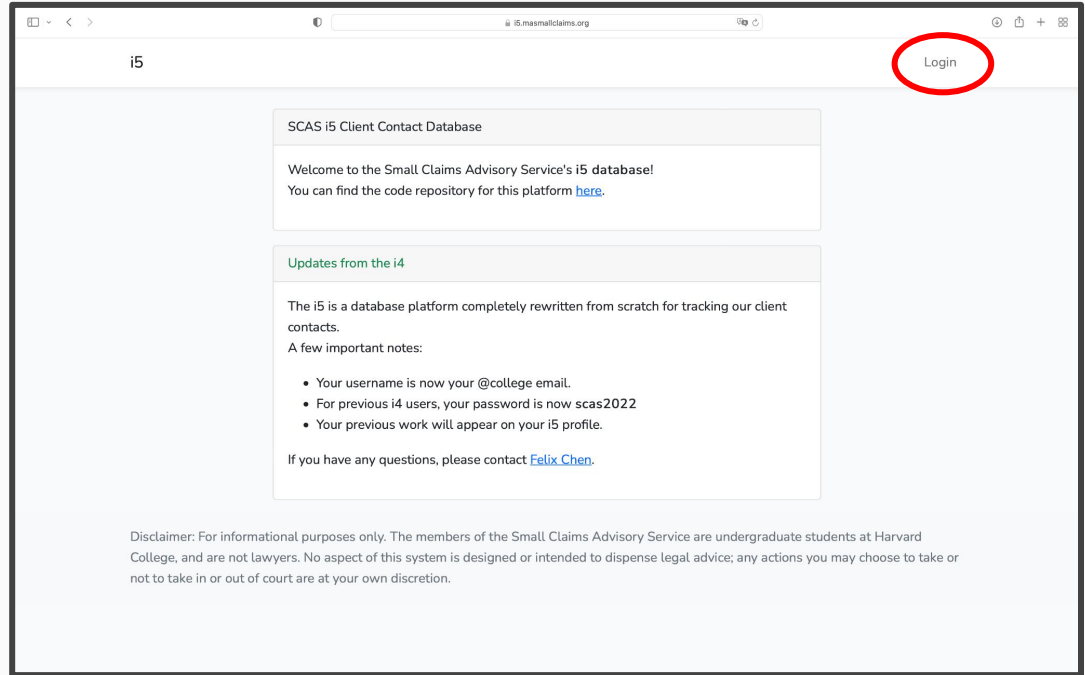
i5 User Guide

Homepage

Click **Login** in order to access your account.

Username: your college email address

Password: **scas2022**



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.

i5

Add Client

Search the i5...

Find Client

Resources

John Harvard

John Harvard
johnharvard@college.harvard.edu
Class of 2025
i5 user since 2022

My Contributions
Clients entered: 58 [\(See all\)](#)
Contacts recorded: 162 [\(See all\)](#)

My recent clients

Name	Phone #	Email
Gabrielle Nienow	516.943.6026	ilene.carter@gmail.com
Kyleigh Hill	+1-303-971-8122	nturner@pagac.com
Sammy Gerhold	1-425-493-0121	fwilkinson@gmail.com
Grady Rath	+15514232893	estell24@gmail.com
Sammie Dooley	1-240-209-5082	ernser.lucienne@hotmail.com

My recent contacts

Date	Type	Summary	Updated
September 3, 1988	Case referred to external agency	Numquam nulla consequuntur minima neque ut qui ducimus. 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 molestiae. Et enim beatae corporis atque incidunt explicabo omnis. Dignissimos tenetur quis sed sit ullam. Nisi id voluptas nisi ea. Sit provident sed ad. Reprehenderit... (View)	July 29, 2022, 4:44 am

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's a search bar with the text "127.0.0.1:8000/client/search?q=" and a "Find Client" button. Below the search bar, there's a dropdown menu with options: "By Name", "By Email", and "By Phone". The main content area displays a table of client records. The table has columns for Name, PH, Email, Language, and State. The records are listed in descending order of urgency, with "Most Recent" and "Most Urgent" at the top. The table shows 15 results, with the first 10 visible. At the bottom of the table, there's a pagination bar showing "Showing 1 to 15 of 100 results" and a set of numbered links (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100).

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 Doolay	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@prossacco.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 McKensie	+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

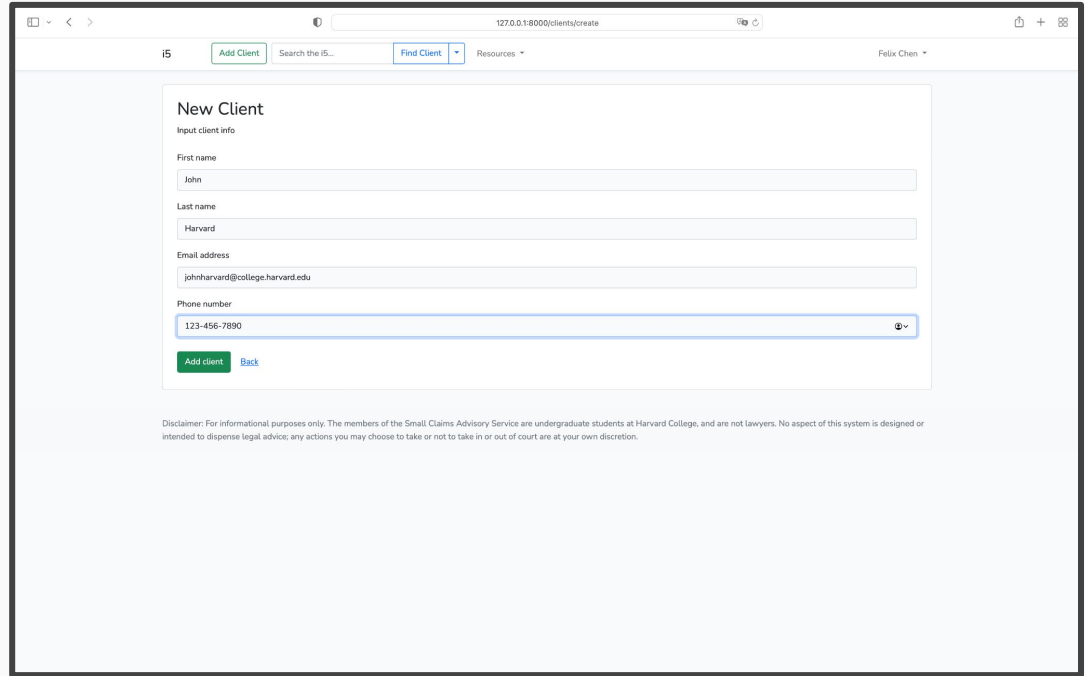
Showing 1 to 15 of 100 results

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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`, a green `Add Client` button, a search bar labeled `Search the i5...`, a blue `Find Client` button, and a `Resources` dropdown menu. On the right side of the navigation bar, the name `Felix Chen` is displayed with a dropdown arrow.

The main content area is titled `New Client` and contains a form for inputting client information. The form has the following fields:

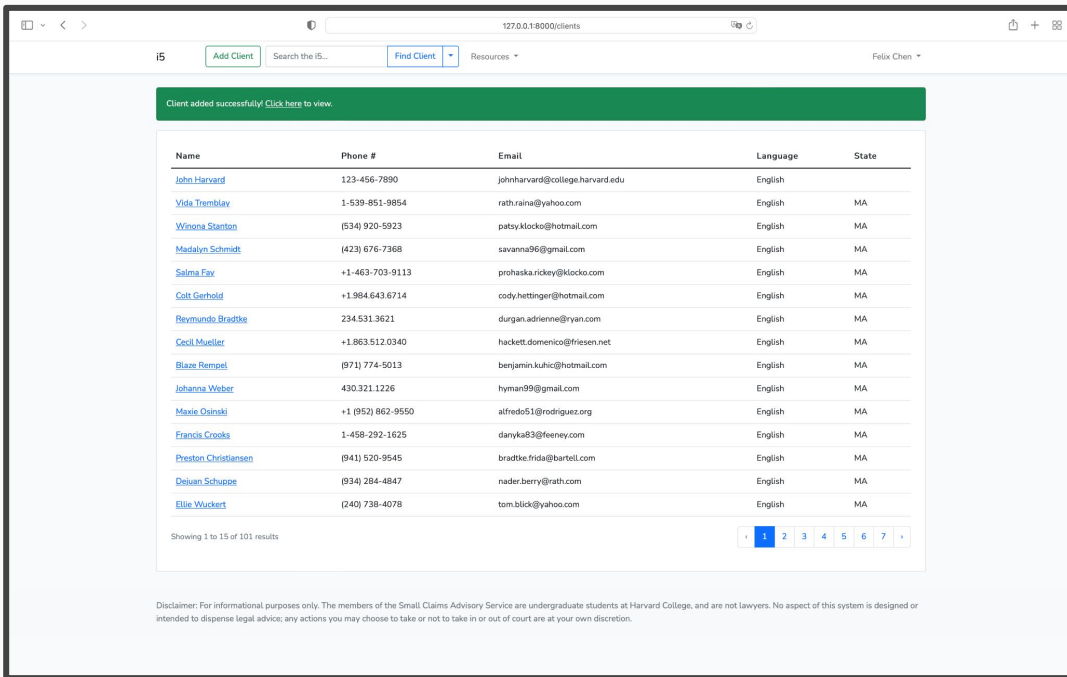
- `First name`: A text input field containing the value `John`.
- `Last name`: A text input field containing the value `Harvard`.
- `Email address`: A text input field containing the value `johnharvard@college.harvard.edu`.
- `Phone number`: A text input field containing the value `123-456-7890`, with a dropdown arrow on the right.

At the bottom of the form, there are two buttons: a green `Add client` button and a blue `Back` button.

Below the form, there is a disclaimer text: `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 is a navigation bar with a search bar and buttons for 'Add Client' and 'Find Client'. Below the navigation bar, a green message box states 'Client added successfully! [Click here to view.](#)'. Below this, a table lists 15 clients with columns for Name, Phone #, Email, Language, and State. The table is paginated, showing results 1 to 15 of 101 total results. 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 or not to take in or out of court are at your own discretion.'

Name	Phone #	Email	Language	State
John Harvard	123-456-7890	john.harvard@college.harvard.edu	English	
Vida Tremblay	1-539-851-9854	rath.raina@yahoo.com	English	MA
Winona Stanton	(534) 920-5923	patsy.klocko@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

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 (dropdown), 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 text "No contacts recorded yet." and a "Record contact" button. A disclaimer at the bottom of the page 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.

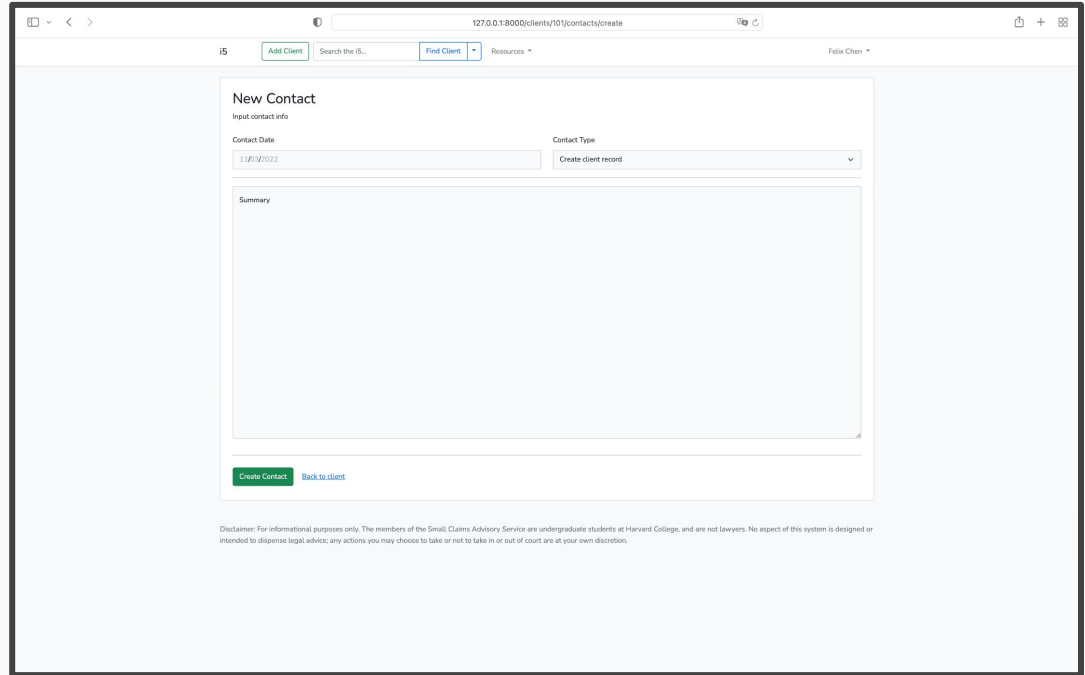
[Record contact](#)

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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 browser window with the URL `127.0.0.1:8000/clients/10/contacts/create`. The page has a header with a navigation bar containing an 'Add Client' button, a search bar, a 'Find Client' dropdown, and a 'Resources' dropdown. The user's name 'Felix Chen' is displayed in the top right. The main content area is titled 'New Contact' and contains a form for 'Input contact info'. The form has two input fields: 'Contact Date' with the value '11/11/2022' and 'Contact Type' with a dropdown menu showing 'Create client record'. Below these fields is a large text area labeled 'Summary'. At the bottom of the form, there are two buttons: 'Create Contact' and 'Back to client'. A disclaimer is visible at the very bottom of the page.

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

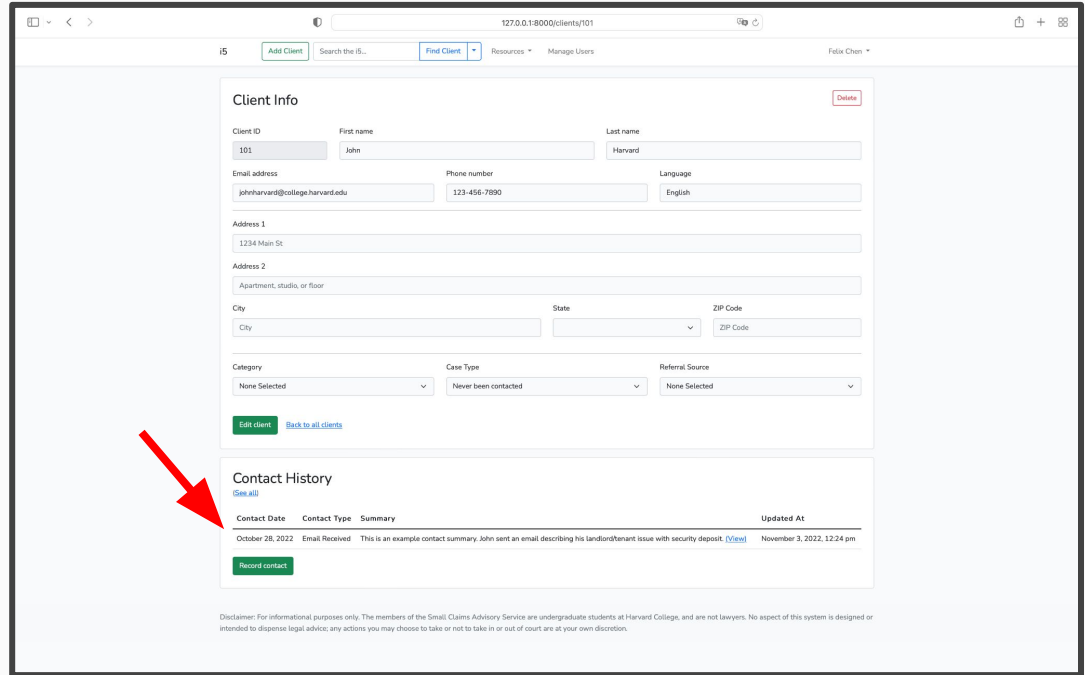
Create Contact Back to client

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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 [Delete](#)

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 [View 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

