

LIVIA PORTAL FAQ

This document contains all the frequently asked questions about the LIVIA portal along with the answers

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FAQ – GENERIC (Home Page)

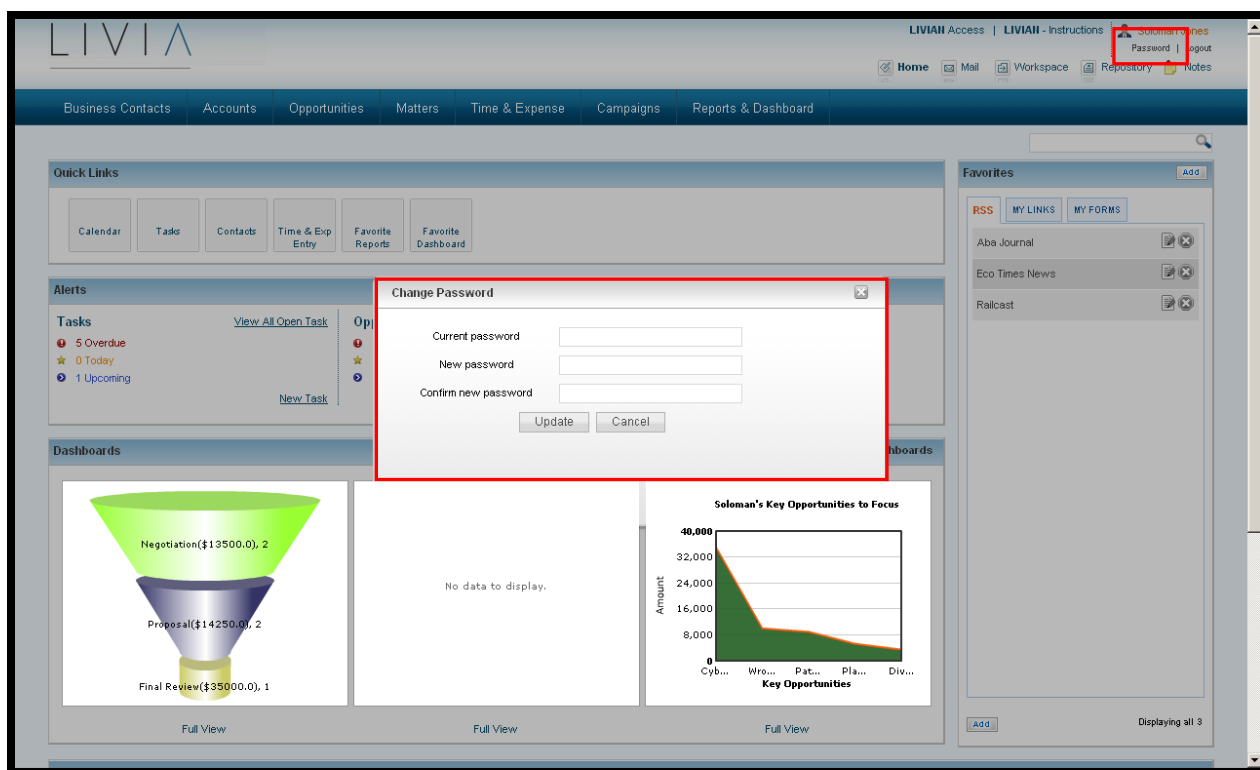
Q1: How do I Log In?

- On the login page, enter Username and Password



Q2: How do I reset my Password?

- Click on the Forgot password link on the
- Login box
- Enter the username or the E-mail
- Click on Reset Password



Q3: How do I change the password?

- Click on the password link on the Home Page on your extreme top right hand side
- Enter the Current password, new password and confirm the password.
- Click on Update to change the password. Click on cancel if don't want to change the password.

Q4: How do I Log out?

- Click on the logout link the Home Page on your extreme top right hand side

Q5: How can I give Access to the LIVIAN?

- Click on the LIVIAN Access Link on the Home Page
- Check/Uncheck the access rights of the modules to give the access rights for the particular modules

The screenshot displays the LIVIA web application interface. At the top, there is a navigation bar with the LIVIA logo, user information (Soloman Jones), and links for Home, Mail, Workspace, Repository, and Notes. Below this is a main menu with categories: Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard. The main content area is divided into several sections: Quick Links (Calendar, Tasks, Contacts, Time & Exp Entry, Favorite Reports), Alerts (Tasks, Opportunities), and Dashboards (Negotiation, Proposal, Final Review). A 'LIVIAN Access' dialog box is open in the center, showing a table of modules and their access rights.

Modules	Access Rights
Repository	✓ Accessible
Workspace	✗ Not-accessible
Reports & Dashboard	✓ Accessible
Time & Expense	✓ Accessible
Matters	✗ Not-accessible
Opportunity	✓ Accessible
Campaigns	✓ Accessible
Mail	✓ Accessible
Business Contacts	✓ Accessible
Accounts	✓ Accessible

Q6: How do I give Instructions to the Livian?

- Click on the Livian Instructions Link.
- Enter the new instruction.
- Select the Matter/Contact.
- Click on Assign to assign the New Instruction (Click on Cancel for not assigning the instruction)

The screenshot displays the LIVIA web application interface. At the top, the LIVIA logo is on the left, and user information (Soloman Jones) and navigation links (Home, Mail, Workspace, Repository, Notes) are on the right. Below this is a horizontal menu with tabs: Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard. The main content area is divided into several sections: Quick Links (Calendar, Tasks, Contacts, Time & Exp Entry, Favorite Reports, Favorite Dashboard), Alerts (Tasks: 5 Overdue, 0 Today, 1 Upcoming), and Dashboards. A 'New Instructions' modal window is open in the center, featuring a table with columns: Instructions, Matter, and Contact. The table has four rows for data entry. Below the table are 'Assign' and 'Cancel' buttons. The background shows a funnel chart for 'Negotiation(\$13500.0), 2', 'Proposal(\$14250.0), 2', and 'Final Review(\$35000.0), 1'. A line graph titled 'Key Opportunities' shows a decreasing trend over time. The bottom of the interface shows 'Full View' buttons for each dashboard section.

Q7: How do I Add Notes?

- Click on the Notes link.
- Enter the notes
- Press Enter key to add new row for notes

The screenshot displays the LIVIA software interface. At the top, there's a navigation bar with links like Home, Mail, Workspace, Repository, and Notes. Below this is a main menu with categories such as Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard. The central area contains several widgets: Quick Links (Calendar, Tasks, Contacts, Time & Exp Entry, Favorite Reports, Favorite Dashboard), Alerts (Tasks, Opportunity Follow-ups, Client Communication), and Dashboards (Negotiation, Proposal, Final Review, and a line graph titled 'Soloman's Key Opportunities to Focus'). A red box highlights a note titled 'Meeting With David' in the top right corner.

Q8: How do I add a Task from Notes?

- Click on the notes link and enter notes. Click on the New Matter Task action icon.
- Select the Matter from the dropdown list. Click on New Task.
- Enter the task name (optional).
- Check the critical checkbox if task is critical else don't check.
- Check the checkbox is it a subtask? (Optional), select the parent task from the dropdown list.
- Click on the radio button To Do or Schedule.
- If clicked on To Do – Enter the Priority & due date.
- Selected Schedule – Select the Start date & End date. Enter the Start time & End time. Select repetitions from the Repeat dropdown list, select Reminder from the Reminder dropdown list, and enter the attendees.
- Select the Responsibility from the dropdown list. Click on the checkbox of Client Task if its a client task.
- Enter the Description.
- Check the complete checkbox if the task status is complete.
- Click on Save. (Click on Cancel if the new task is not to be saved)

Q9: How do I add a Time Entry from Notes?

- Click on the notes link and enter notes. Click on the Add Time Entry action icon.
- Select the Date for the time entry.
- Select the Matter/Contact from the dropdown list or check the internal checkbox to make the time entry internal.
- Enter the Start time and End Time.
- Enter the duration, rate.
- Select the Activity type from the dropdown list.
- Enter the description.
- Check the Billable entry to make the time entry billable.
- Upload the document.
- Click on Save & Exit. (If the time entry is not be saved then click on Cancel)

Q10. How do I delete a Note?

- Click on the notes link and enter the notes.
- Click on the Delete action icon to delete the notes.

FAQ-CONTACT

Q1: How do I create a contact?

- Click on “Business Contacts”
- Click on “Create a New Contact” link along the horizontal navigation bar to access the desired contact creation form.
- Enter the required information
- Save and Exit

The screenshot displays the 'New Contact' form within the LIVIA web application. The interface includes a top navigation bar with links like Home, Mail, Workspace, Repository, and Notes. A left sidebar shows 'Contacts - Reports' with options for Current Contacts, Recently Added Contacts, and Contacts Linked To Accounts. The main form area is titled 'New Contact' and contains several tabs: Business Contact Details, Education and Work, Personal Information, Sales Related Details, and Others. The form fields are organized into sections: Personal Information (Salutation, First Name, Last Name, Phone, Email, Nick Name, Preference), Business Contact Details (Account, Source, Stage, Assigned, Rating, Status), Contact Information (Street, City, State, Zip Code, Country, Alternate Email, Mobile, Fax, Do not Call checkbox), and Business Information (Company, Department, Title, Reports to, Website, Comment).

Q2: How do I edit a contact?

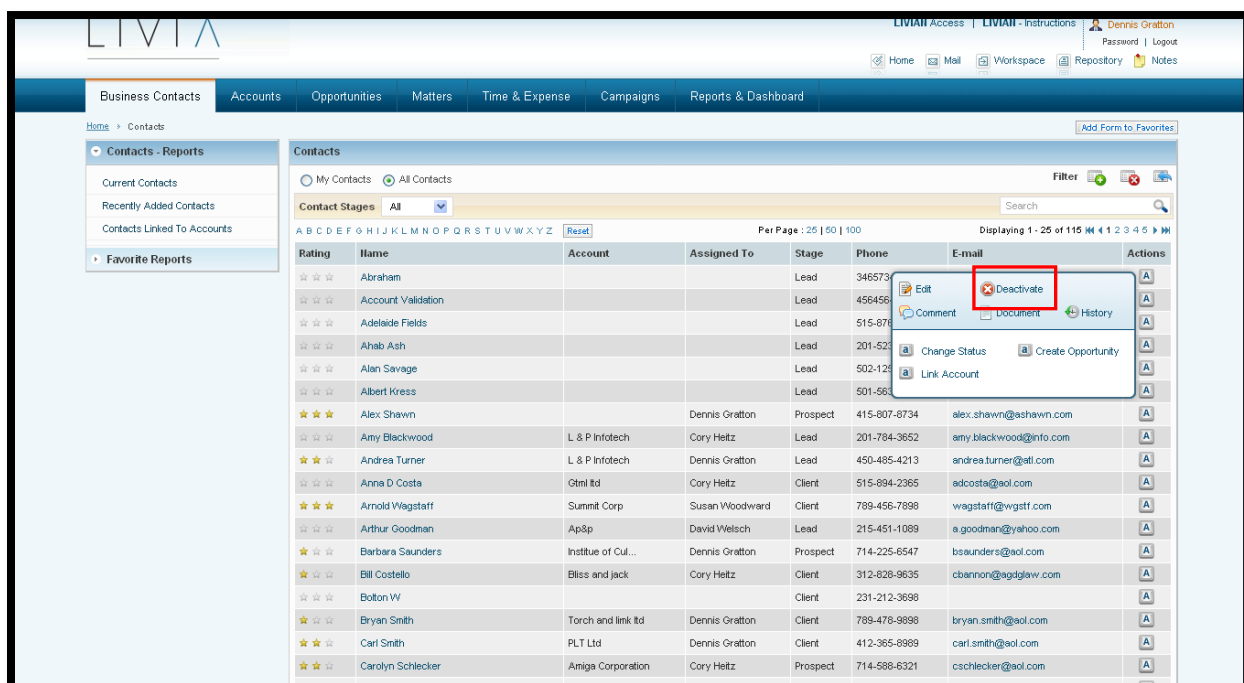
- Scroll on the Action Pad and click the edit icon (small icon that resembles a notepad with a pen)
- Edit the required Information
- Save and Exit

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Home, Mail, Workspace, Repository, and Notes. The main menu on the left lists Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard. The 'Contacts' section is active, displaying a list of contacts. A red box highlights the 'Edit' icon (a notepad with a pen) in the Actions column for the contact 'Alex Shawn'.

Rating	Name	Account	Assigned To	Stage	Phone	E-mail	Actions
☆☆☆	Abraham			Lead	34657		[Edit] [Deactivate]
☆☆☆	Account Validation			Lead	45645		[Comment] [Document] [History]
☆☆☆	Adelaide Fields			Lead	515-876		[Change Status] [Create Opportunity]
☆☆☆	Ahab Ash			Lead	201-523		[Link Account]
☆☆☆	Alan Savage			Lead	502-123		
☆☆☆	Albert Kress			Lead	501-567		
☆☆☆	Alex Shawn		Dennis Gratton	Prospect	415-807-8734	alex.shawn@ashavn.com	[Edit] [Deactivate]
☆☆☆	Amy Blackwood	L & P Infotech	Cory Heltz	Lead	201-784-3652	amy.blackwood@info.com	[Edit] [Deactivate]
☆☆☆	Andrea Turner	L & P Infotech	Dennis Gratton	Lead	450-485-4213	andrea.turner@ati.com	[Edit] [Deactivate]
☆☆☆	Anna D Costa	Gtm Ltd	Cory Heltz	Client	515-894-2365	adcosta@aol.com	[Edit] [Deactivate]
☆☆☆	Arnold Wiegstaff	Summit Corp	Susan Woodward	Client	789-456-7898	wiegstaff@wgtstf.com	[Edit] [Deactivate]
☆☆☆	Arthur Goodman	Ap8p	David Welsch	Lead	215-451-1089	a.goodman@yahoo.com	[Edit] [Deactivate]
☆☆☆	Barbara Saunders	Institute of Cul...	Dennis Gratton	Prospect	714-225-6547	bsaunders@aol.com	[Edit] [Deactivate]
☆☆☆	Bill Costello	Bliss and Jack	Cory Heltz	Client	312-626-9635	cbannon@agdgilaw.com	[Edit] [Deactivate]
☆☆☆	Boton W			Client	231-212-3698		[Edit] [Deactivate]
☆☆☆	Bryan Smith	Torch and link Ltd	Dennis Gratton	Client	789-478-9898	bryan.smith@aol.com	[Edit] [Deactivate]
☆☆☆	Carl Smith	PLT Ltd	Dennis Gratton	Client	412-365-8989	carl.smith@aol.com	[Edit] [Deactivate]
☆☆☆	Carolyn Schlecker	Amiga Corporation	Cory Heltz	Prospect	714-598-6321	cschlecker@aol.com	[Edit] [Deactivate]

Q3: How do I deactivate a contact?

- Scroll on the Action Pad and click the deactivate icon (small icon that resembles a circle and a X)
- It will give you a Pop-Up “Are you sure you want to deactivate this contact?”
- Click on OK



Q4: If I deactivate a Contact, can I reactivate it?

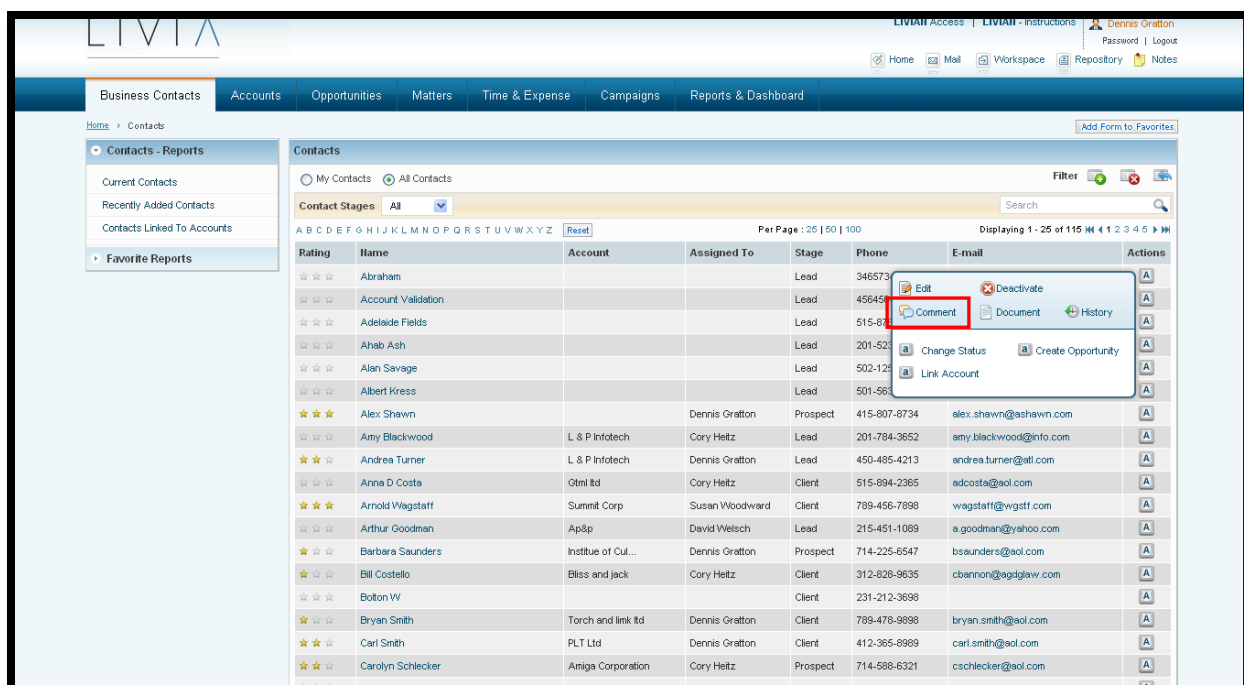
- A deactivated Contact can be re-activated

Q5: How do I re-activate a Contact?

- Click on Business Contacts
- Click on view deactivated Contacts with a red circle which appears on the Business Contact Home Page
- Select the Contact that needs to be activated
- Click “the action icon” located at the extreme right of the account homepage.
- Then click on activate from the action pad
- On the modal window click on ok to activate the Contact

Q6: How do I add a comment?

- Scroll on the Action Pad and click on Comment (small icon that resembles a callout)
- It will give you a Pop-Up to Add a Comment
- Add Comment
- Save



Q7: How do I add a document?

- Scroll on the Action Pad and click on Document
- Upload a Document by adding the required details
- Click on Upload

Q8: How do I check the History?

- Scroll on the Action Pad and click on History
- You will be able to check on all the Actions that have made for the particular Contact

Q9: How do I change the Status of a Contact?

- Scroll on the Action Pad and click on Change Status
- Change to the required Status and Add a Reason for change
- Click on Update

Q10: How do I Create an Opportunity from Contacts?

- Scroll on the Action Pad and click on Create Opportunity
- Enter the required Information (Name of the Opportunity, Stage, Assigned To and Source)
- Click on Save

Q11: How do I Link an Account to Business Contacts?

- Scroll on the Action Pad and click on Link Account
- Select from an Existing Account or Create a New Account
- Click on Save

Q12: How do I access the Contacts assigned to me?

- All Contacts will list all the Contacts that is visible to all users within the law firm
- By clicking on My Contact on the Business Contact Home Page, it will list all the Contacts assigned to you

Q13: How to sort as per alphabets?

- By clicking on the letters within the Business Contact Home Page the Contacts are listed as per the letter selected

The screenshot displays the LIVIA Business Contacts interface. The top navigation bar includes links for Home, Mail, Workspace, Repository, and Notes. The main menu on the left shows 'Business Contacts' as the active section, with sub-options for 'Current Contacts', 'Recently Added Contacts', and 'Contacts Linked To Accounts'. The main content area is titled 'Contacts' and features a search bar, a 'Filter' button, and a 'Contact Stages' dropdown menu set to 'All'. Below this, a red box highlights the alphabetical sorting options (A-Z, a-z, etc.). The contact list is displayed in a table with columns: Rating, Name, Account, Assigned To, Stage, Phone, E-mail, and Actions. The table shows 15 contacts, with the first few being 'Abraham', 'Account Validation', 'Adelaide Fields', 'Ahab Ash', and 'Alan Savage'. The 'Assigned To' column shows 'Dennis Gratton' for several contacts.

Rating	Name	Account	Assigned To	Stage	Phone	E-mail	Actions
☆☆☆	Abraham			Lead	346573466545		[A]
☆☆☆	Account Validation	Ace		Lead	4564564		[A]
☆☆☆	Adelaide Fields			Lead	515-876-5410	zeeshan.shalkh@livia...	[A]
☆☆☆	Ahab Ash			Lead	201-523-9658	a.ash@gmail.com	[A]
☆☆☆	Alan Savage			Lead	502-125-1369	a.savage@gmail.com	[A]
☆☆☆	Albert Kress			Lead	501-563-2069	a.kress@gmail.com	[A]
☆☆☆	Alex Shawn		Dennis Gratton	Prospect	415-807-8734	alex.shawn@ashawn.com	[A]
☆☆☆	Amy Blackwood	L & P Infotech	Cory Heltz	Lead	201-784-3652	amy.blackwood@info.com	[A]
☆☆☆	Andrea Turner	L & P Infotech	Dennis Gratton	Lead	450-485-4213	andrea.turner@atl.com	[A]
☆☆☆	Anna D Costa	Otni Ltd	Cory Heltz	Client	515-894-2365	adcosta@aol.com	[A]
☆☆☆	Arnold Wagstaff	Summit Corp	Susan Woodward	Client	789-456-7898	wagstaff@wagstaff.com	[A]
☆☆☆	Arthur Goodman	Ap&p	David Vetsch	Lead	215-451-1089	a.goodman@yahoo.com	[A]
☆☆☆	Barbara Saunders	Institute of Cul...	Dennis Gratton	Prospect	714-225-6547	bsaunders@aol.com	[A]
☆☆☆	Bill Costello	Bliss and Jack	Cory Heltz	Client	312-828-9635	cbannon@agdgilaw.com	[A]
☆☆☆	Bolton W			Client	231-212-3698		[A]
☆☆☆	Bryan Smith	Torch and Link Ltd	Dennis Gratton	Client	789-478-9898	bryan.smith@aol.com	[A]
☆☆☆	Carl Smith	PLT Ltd	Dennis Gratton	Client	412-365-8989	carl.smith@aol.com	[A]
☆☆☆	Carolyn Schlecker	Amiga Corporation	Cory Heltz	Prospect	714-588-6321	csclecker@aol.com	[A]
☆☆☆	Carolyn Ritz		Jean Tarlow	Client	212-616-5032	carolynr@gmail.com	[A]

Q 14: How do I Import Contacts?

- Click on the import icon located at the top right of the contacts home page
- Browse for the file that needs to be imported
- If required select the file format from the drop down list


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 Password | Logout
 Home Mail Workspace Repository Notes

Business Contacts Accounts Opportunities Matters Time & Expense Campaigns Reports & Dashboard

Home > Contacts

Contacts - Reports
 Current Contacts
 Recently Added Contacts
 Contacts Linked To Accounts
 Favorite Reports

Contacts




















Filter 

My Contacts All Contacts

Contact Stages: All

Per Page: 25 | 50 | 100

Displaying 1 - 25 of 115

Rating	Name	Account	Assigned To	Stage	Phone	E-mail	Actions
☆☆☆	Abraham			Lead	346573486545		
☆☆☆	Account Validation	Ace		Lead	4564564		
☆☆☆	Adelaide Fields			Lead	515-876-5410	zeeshan.shalkh@livia...	
☆☆☆	Ahab Ash			Lead	201-523-9656	a.ash@gmail.com	
☆☆☆	Alan Savage			Lead	502-125-1369	a.savage@gmail.com	
☆☆☆	Albert Kress			Lead	501-563-2069	a.kress@gmail.com	
☆☆☆	Alex Shawn		Dennis Gratton	Prospect	415-807-8734	alex.shawn@ashawn.com	
☆☆☆	Amy Blackwood	L & P Infotech	Cory Heltz	Lead	201-784-3652	amy.blackwood@info.com	
☆☆☆	Andrea Turner	L & P Infotech	Dennis Gratton	Lead	450-485-4213	andrea.turner@ati.com	
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☆☆☆	Arnold Wagstaff	Summit Corp	Susan Woodward	Client	789-456-7898	wagstaff1@wgstf.com	
☆☆☆	Arthur Goodman	Ap&p	David Welsch	Lead	215-451-1089	a.goodman@yahoo.com	
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☆☆☆	Bill Costello	Bliss and jack	Cory Heltz	Client	312-828-9635	cbannon@agdlaw.com	
☆☆☆	Bolton W			Client	231-212-3698		
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☆☆☆	Carolyn Ritz		Jean Tarlow	Client	212-616-5032	carolyrn@gmail.com	


LIVIA Access | LIVIA - Instructions | Dennis Gratton
 Password | Logout
 Home Mail Workspace Repository Notes

Business Contacts Accounts Opportunities Matters Time & Expense Campaigns Reports & Dashboard

Home > Contacts > File Import

File Import

Import Type: Contacts

Select a file: 

File Format: CSV

Upload File Format (CSV)

Import Cancel

* Required field, * Either Email or Phone should be given

FAQ - ACCOUNTS

- How do I create an Account?
 - Log on to the portal
 - Click on the "Account Module"
 - Click on "Create New Account icon with a green circle" which appears on the Accounts home page
 - Enter the required information

The screenshot shows the LIVIA Accounts module. The top navigation bar includes 'Business Contacts', 'Accounts' (highlighted), 'Opportunities', 'Matters', 'Time & Expense', 'Campaigns', and 'Reports & Dashboard'. The left sidebar under 'Accounts - Reports' lists 'Current Accounts', 'Recently added Accounts', 'Contacts linked to Accounts', 'Inactive Accounts', 'Active Accounts', and 'Favorite Reports' (selected). The main content area shows a list of accounts. A 'Filter' button with a green circle icon is highlighted in the top right of the list area.

Name	Primary contact	Assigned To	Phone	Contacts	Opp	Website	Actions
Ace	Mary Luis	Cory Heltz	789-466-1322	3	0	www.ace1.com	[A]
Aisk	Jerome Fleishmann	Cory Heltz	312-322-0056	1	0	www.aindk.com	[A]
Amiga Corporation	Carolyn Schlecker	Cory Heltz	714-588-6321	2	1	www.amigacorp.com	[A]
Amp ltd	Miguel Esteban	Cory Heltz	847-402-7174	2	0	www.2ampstd.com	[A]
Amy brands	Ralph Shaw	Cory Heltz	205-986-9632	1	0	www.amybrands.com	[A]
Ap&p	Arthur Goodman	Dennis Gratton	101-451-1082	1	0	www.apndp.com	[A]
Atomic research inc	Craig Andrews	Dennis Gratton	212-456-3563	1	1	www.atrsrch.com	[A]
Banchs	Patricia Hild	Cory Heltz	847-953-1512	1	0	www.1banchs.com	[A]
B & E Television Networks	Jane Mills	Cory Heltz	212-374-7435	1	0	www.BETV.co.in	[A]
Bliss and jack	Bill Costello	Cory Heltz	216-963-9865 312-828-9635	1	0	www.1blscorp.com	[A]
Brackwel insur ltd	Ingrid Vlahle	David Welsch	784-857-9865	1	1	www.brackwel.com	[A]
Cto acc	Cto 1		445646545	1	0		[A]
Ctl inc	Jennifer D Souza	Cory Heltz	515-632-9874	1	0	www.ccttl.com	[A]
Doctor Medical Equipments Inc.	Ronny Rice	Cory Heltz	213-515-7012	2	4	www.dmequipments.com	[A]
Gtml ltd	Anna D Costa	Cory Heltz	515-894-2365	1	0	www.gtml.co.in	[A]
HBOS	Paula Ryan	Dennis Gratton	714-848-9515	1	0	www.hbos.com	[A]
Institute of Cultural Arts	Barbara Saunders	Dennis Gratton	212-985-9632	1	1	www.instculart.com	[A]
Instructs ltd	Tiffany Wagner	David Welsch	798-857-6894	1	0	www.instructs.com	[A]
Ispe	Jeremy Sanders			1	0		[A]

- How do I add a contact while creating an account?
 - While creating an account, a new or an existing contact can be associated to an account.
 - To create a new contact click on "create new"
 - To select an existing contact enter the first 3 initials of the name of the contact
- Can I sort the accounts list as per the alphabets?
 - By clicking on the "letters" within the account home page the accounts are listed as per the letter selected

The screenshot shows the LIVIA Accounts page. The top navigation bar includes 'Business Contacts', 'Accounts', 'Opportunities', 'Matters', 'Time & Expense', 'Campaigns', and 'Reports & Dashboard'. The left sidebar has 'Accounts - Reports' and 'Favorite Reports'. The main content area shows a list of accounts with columns: Name, Primary contact, Assigned To, Phone, Contacts, Opp, Website, and Actions. A red box highlights the 'Reset' button in the alphabetical index at the top of the list.

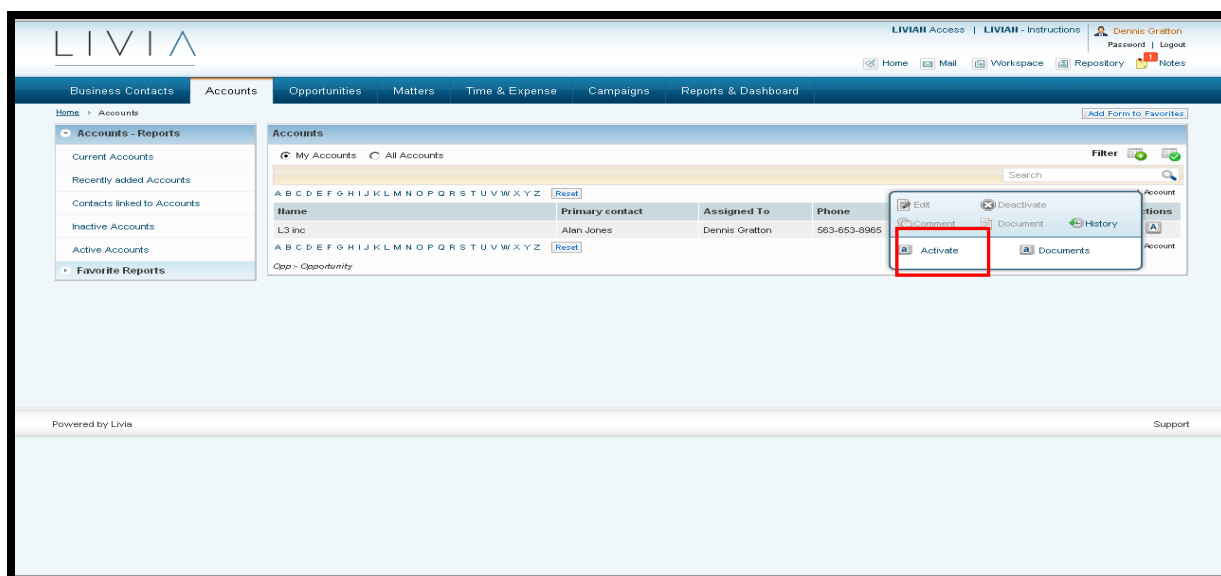
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Amiga Corporation	Carolyn Schlecker	Cory Heltz	714-588-6321	2	1	www.amigacorp.com	[A]
Amp ltd	Miguel Esteban	Cory Heltz	847-402-7174	1	0	www.2ampitd.com	[A]
Amy brands	Ralph Shaw	Cory Heltz	205-986-9632	1	0	www.amybrands.com	[A]
Ap&p	Arthur Goodman	Dennis Gratton	101-451-1082	1	0	www.apndp.com	[A]
Atomic research inc	Craig Andrews	Dennis Gratton	212-456-3563	1	0	www.atrsrch.com	[A]
Banachs	Patricia Hild	Cory Heltz	847-953-1512	1	0	www.1banchs.com	[A]

4. How do I access the accounts assigned to me?
 - All accounts will list all the accounts that is visible to all users within the law firm
 - By clicking on “my account” on the account home page, it will list all the accounts assigned to you
5. How do I edit the information of a particular account?
 - You can modify the account information anytime by clicking “the action icon” located at the extreme right of the account homepage.
 - Then click on “edit” from the action pad and edit the necessary details

The screenshot shows the LIVIA Accounts page with a list of accounts. A red box highlights the 'Edit' button in the action pad, which is located at the extreme right of the account homepage. The action pad also includes buttons for 'Deactivate', 'Comment', 'Document', 'History', 'Add contact', and 'Change Primary Contact'.

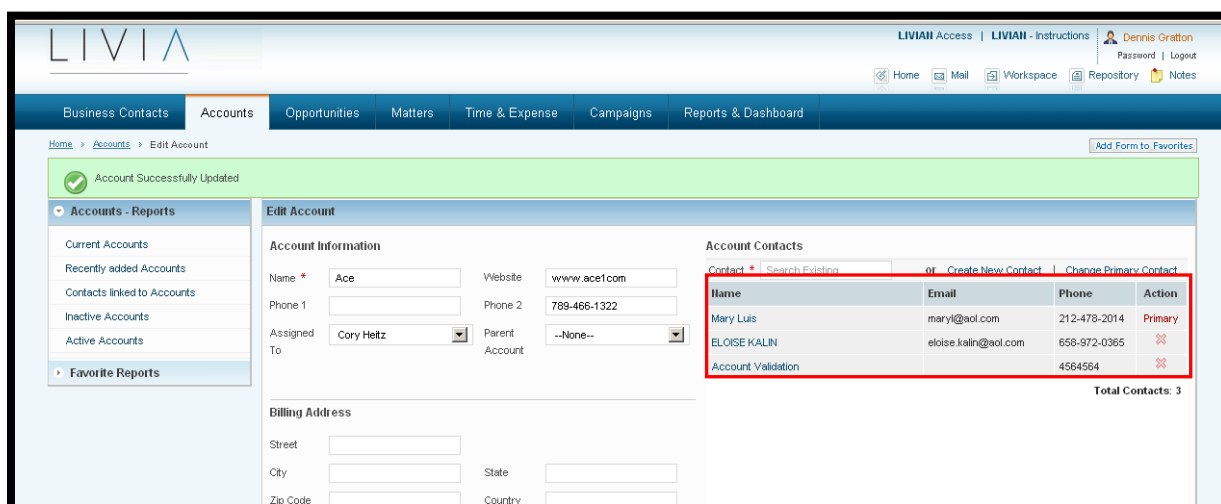
Name	Primary contact	Assigned To	Phone	Contacts	Opp	Website	Actions
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Atomic research inc	Craig Andrews	Dennis Gratton	212-456-3563	1	1	www.atrsrch.com	[A]
Banachs	Patricia Hild	Cory Heltz	847-953-1512	1	0	www.1banchs.com	[A]
B & E Television Networks	Jane Mills	Cory Heltz	212-374-7435	1	0	www.BETV.co.in	[A]
Bliss and jack	Bill Costello	Cory Heltz	216-963-9865	1	0	www.1blscorp.com	[A]
Brackwel insur ltd	Ingrid Wahle	David Welsch	784-857-9865	1	1	www.brackwel.com	[A]
Cto acc	Cto 1		445646545	1	0		[A]
Cti inc	Jennifer D Souza	Cory Heltz	515-632-9874	1	0	www.ctitl.com	[A]
Doctor Medical Equipments Inc.	Ronny Rice	Cory Heltz	213-515-7012	2	4	www.dmequipments.com	[A]
Gtmi ltd	Anna D Costa	Cory Heltz	515-894-2365	1	0	www.gtmi.co.in	[A]
HBOS	Paula Ryan	Dennis Gratton	714-848-9515	1	0	www.hbos.com	[A]
Institute of Cultural Arts	Barbara Saunders	Dennis Gratton	212-985-9632	1	1	www.instculart.com	[A]
Instructs ltd	Tiffany Wagner	David Welsch	798-857-6894	1	0	www.instructs.com	[A]
Ispa	Jeremy Sanders			1	0		[A]

6. How do I add a contact to an existing account?
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “add contact” from the action pad
 - A modal window will appear to “add a new contact” or an “existing contact”
 - Click on “save” once the contact is selected
7. How do I change a primary contact of an account?
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “change primary contact” from the action pad
 - On the modal window change the primary contact
8. How do I deactivate an account?
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “deactivate” from the action pad
 - An account cannot be deactivated if associated with a matter
9. How do I comment on an account?
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “comment” from the action pad
 - On the modal window enter the comment
 - Comment once entered will be displayed below of the comment modal window
10. How do I add a document to an account?
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “document” from the action pad
 - On the modal window enter the add the document
 - Document once added will be displayed below of the document modal window
11. What information will the history tab provide?
 - The history tab is provide information like the creation of the account
 - Comments posted
 - If the account is deactivated
12. If I deactivate an account, can I activate it again?
 - A deactivated account can be re-activated
13. How do I activate an account again?
 - Click on the “account” module
 - Click on “view deactivated account with a red circle” which appears on the account home page
 - Select the account that needs to be activated
 - Click “the action icon” located at the extreme right of the account homepage.
 - Then click on “activate” from the action pad
 - On the modal window click on ok to activate the account



14. How do I delete a contact from an account?

- Select the "account" from which the contact needs to be deleted
- Under "account contacts" the list of contacts for that account is visible
- Click the "cross sign" under action



FAQ - OPPORTUNITY

1. How to create an Opportunity?

- Log on to the portal
- Click on the “Opportunities”
- Click on “create new opportunity icon with a green circle” which appears on the opportunity home page
- Enter the required information

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Home, Mail, Workspace, Repository, and Notes. The 'Opportunities' tab is selected. The left sidebar contains 'Opportunities - Reports' with sub-links for Opportunity Pipeline, Opportunity Source, Open Opportunity, and Favorite Reports. The main content area displays a table of opportunities. A red box highlights the 'Filter' button in the top right corner of the table area.

Opportunity	Stage	Contact	Account	Assigned To	Prob (%)	Amt (\$)	Follow-up Date	Closing Date	Actions
Asset Management	Proposal	Robinson Gilman		Dennis Gratton	50	3,500	10/12/10	07/22/10	[A]
Atrocities Towards Animals	Final review	Ingrid Wahle	Brackwel Ins...	Dennis Gratton	70	5,000	08/26/10	08/09/10	[A]
Automotive Disputes	Prospecting	Maragot Block		Cory Heltz	40	5,000		07/28/10	[A]
Blackberry Services	Prospecting	Diego Ambercrombie		Susan Woodward		10,000	10/22/10	10/20/10	[A]
Breach Of Contract	Negotiation	Graham Reyer		Dennis Gratton	80	350		08/13/10	[A]
Commercial Litigation	Proposal	David Smith		Dennis Gratton	80	7,500		07/20/10	[A]
Copyright Violation	Prospecting	Tracy Bliss		Cory Heltz		4,000		09/22/10	[A]
Discrimination	Proposal	Theresa Peters		Dennis Gratton	80	2,500			[A]
Divorce	Final review	John Richardson		Dennis Gratton	100	3,500			[A]
Environment Conservation	Negotiation	Gordon Saltzman	Metal plates...	Jean Tarlow	70	650		05/26/10	[A]
Estate Planning	Negotiation	Barbara Saunders	Institute of ...	David Welsch	50	650	07/29/10	07/23/10	[A]
Family Issues	Prospecting	Steffi Soarns		Dennis Gratton					[A]
Family Issues	Prospecting	Jamie Howard		Dennis Gratton		5,500		09/08/10	[A]
In-Appropriate Death	Prospecting	Rita Hammer		Susan Woodward	60	5,000		08/05/10	[A]
Incorporations	Final review	Rebecca Finch	Doctor Medic...	Dennis Gratton	90	800		07/22/10	[A]
Insurance Claim	Proposal	Debbie Singer		Dennis Gratton	90	3,000	09/03/10	07/24/10	[A]
Insurance Claims	Proposal	Dana Goodman		Cory Heltz	80	3,200		09/24/10	[A]
Insurance Defence	Final review	Will Sanders		Jean Tarlow	50	4,500	07/31/10	07/29/10	[A]
Labour Law	Prospecting	Steffi Soarns		Dennis Gratton					[A]

2. How do I access the opportunities assigned to me?

- “All opportunities” will list the opportunities that is visible to all the users within the law-firm
- “My opportunities” will list the opportunities assigned to you

- Page
-
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LIVIA

LIVIAH Access | LIVIAH - Instructions
Dennis Gratton
Password | Logout

Home Mail Workspace Repository Notes

Business Contacts
Accounts
Opportunities
Matters
Time & Expense
Campaigns
Reports & Dashboard

Home > Opportunities

Add Form to Favorites

Opportunities - Reports
Opportunity Pipeline
Opportunity Source
Open Opportunity
Favorite Reports

Opportunities

My Opportunities
All Opportunities

Stage Filter(s)
All

ABCDEFGHIJKLMNOPQRSTUVWXYZ
Reset

Filter

Search

Displaying all 15

Opportunity	Stage	Contact	Account	Assigned To	Prob (%)	Amt (\$)	Follow-up Date	Closing Date	Actions
Asset Management	Proposal	Robinson Gilman		Dennis Gratton	50	3,500	10/12/10	07/22/10	A
Atrocities Towards Animals	Final review	Ingrid Wahle	Brackwel ins...	Dennis Gratton	70	5,000	08/26/10	08/09/10	A
Breach Of Contract	Negotiation	Graham Reyer		Dennis Gratton	80	350		08/13/10	A
Commercial Litigation	Proposal	David Smith		Dennis Gratton	80	7,500		07/20/10	A
Discrimination	Proposal	Theresa Peters		Dennis Gratton	80	2,500			A
Divorce	Final review	John Richardson		Dennis Gratton	100	3,500			A
Family Issues	Prospecting	Steffi Soarns		Dennis Gratton					A
Family Issues	Prospecting	Jamie Howard		Dennis Gratton		5,500		09/09/10	A
Incorporations	Final review	Rebecca Finch	Doctor Medic...	Dennis Gratton	90	800		07/22/10	A
Insurance Claim	Proposal	Debbie Singer		Dennis Gratton	90	3,000	09/03/10	07/24/10	A
Labour Law	Prospecting	Jamie Howard		Dennis Gratton		2,000	09/09/10	08/24/10	A
Labour Law	Prospecting	Steffi Soarns		Dennis Gratton					A
Lease Defaulters	Prospecting	Sara Jones		Dennis Gratton	60	2,500		06/24/10	A
Required Green Space	Prospecting	Rinnie Rice		Dennis Gratton	60	10,000	09/03/10	08/14/10	A
Taxation	Proposal	Carolyn Schlecker	Amiga Corpor...	Dennis Gratton	70	200		06/14/10	A

ABCDEFGHIJKLMNOPQRSTUVWXYZ
Reset

Displaying all 15

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Support

4. How do I edit the information about the opportunity?
 - You can edit the opportunity information anytime by clicking “the action icon” located at the extreme right of the opportunity homepage.
 - Then click on “edit” from the action pad and edit the necessary details

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Home, Mail, Workspace, Repository, and Notes. The main menu has tabs for Business Contacts, Accounts, Opportunities (selected), Matters, Time & Expense, Campaigns, and Reports & Dashboard. The Opportunities tab is active, displaying a list of opportunities. A red box highlights the action pad for a specific opportunity, showing options like Edit, Deactivate, Comment, Document, and History. The table lists various opportunities with columns for Opportunity, Stage, Contact, Account, Assigned To, and a date column.

Opportunity	Stage	Contact	Account	Assigned To				
Asset Management	Proposal	Robinson Gilman		Dennis Gratton				
Atrocities Towards Animals	Final review	Ingrid Wahle	Brackwel ins...	Dennis Gratton				
Breach Of Contract	Negotiation	Graham Reyer		Dennis Gratton				
Commercial Litigation	Proposal	David Smith		Dennis Gratton	80	7,500		07/20/10
Discrimination	Proposal	Theresa Peters		Dennis Gratton	80	2,500		
Divorce	Final review	John Richardson		Dennis Gratton	100	3,500		
Family Issues	Prospecting	Steffi Soarns		Dennis Gratton				
Family Issues	Prospecting	Jamie Howard		Dennis Gratton		5,500		09/08/10
Incorporations	Final review	Rebecca Finch	Doctor Medic...	Dennis Gratton	90	800		07/22/10
Insurance Claim	Proposal	Debbie Singer		Dennis Gratton	90	3,000	09/03/10	07/24/10
Labour Law	Prospecting	Jamie Howard		Dennis Gratton		2,000	09/03/10	08/24/10
Labour Law	Prospecting	Steffi Soarns		Dennis Gratton				
Lease Defaulters	Prospecting	Sara Jones		Dennis Gratton	60	2,500		06/24/10
Required Green Space	Prospecting	Rimmie Rice		Dennis Gratton	60	10,000	09/03/10	08/14/10
Taxation	Proposal	Carolyn Schlecker	Amiga Corpor...	Dennis Gratton	70	200		

5. I would like to deactivate an opportunity, how do I do this?
 - You can deactivate the opportunity by clicking “the action icon” located at the extreme right of the opportunity homepage.
 - Then click on “Deactivate” from the action pad
6. How do I comment on an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Then click on “Comment” from the action pad
7. How do I view the past comments of an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Then click on “Comment” from the action pad
 - The face box that appears will have all the past comments
8. How do I use documents within the opportunity tab?
 - You can browse and add a document
 - You can replace or download a document
 - You can delete a document

9. How do I add a new document?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Then click on “Document” from the action pad
 - “Browse” for the document and fill in the required information
 - Then click on “upload”
10. How do I download a document?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Click on “Document” from the action pad
 - Click on the “download icon” from the action pad within the document face box
 - Then click on “open/save” the file
11. How do I replace a document?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Click on “Document” from the action pad
 - Click on the “Replace icon” from the action pad within the document face box
 - Then click on “replace document”
12. How do I view the opportunity history?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Then click on “history” from the action pad
13. What information will the history tab provide?
 - You can view when was the opportunity created
 - You can view the comments posted on the opportunity
 - You can view any status update on the opportunity
 - You can also view any note posted for the opportunity
14. How do I change the status of an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Then click on “change status” from the action pad
 - Change the stage of the opportunity
 - Enter a reason for change of status
 - Then click on “save & exit”
15. An opportunity deactivated can it be activated again, how do I view the deactivated opportunity?
 - An opportunity once deactivated cannot be activated again
 - Click on “view deactivated opportunities icon with a red circle” which appears on the opportunity home page
 - Once clicked will give you a list of opportunities that are deactivated
16. How do I Manage Follow up for an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Click on “manage follow up” from the action pad
 - Then check the “follow up done” check box
17. How do I change the Follow up date for an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Click on “manage follow up” from the action pad
 - You can then change the follow up date
18. How do I change the closing date for an opportunity?
 - Click on “the action icon” located at the extreme right of the opportunity homepage
 - Click on “change closing date” from the action pad
 - From the face box you can change the closing date

19. How can I search for my opportunities?

- You can enter the entire name of the opportunity or the first three letters of the opportunity in the “search field”
- You can search as per alphabet
- You can search by contact
- You can search by filter

20. I would like to view how my opportunities are sorted, how do I do this?

- You can click on “manage opportunity” which appears on the opportunities home page
- Within manage opportunity; the opportunities are listed as per the stages

FAQ- MATTERS

1. How to create a matter?
 - Log on to the portal
 - Click on the “Matters tab”
 - Click on “create new matter icon with a green circle” which appears on the matter home page
 - Enter the required information
2. How can I search for a matter?
 - You can enter the entire name of the matter or the first three letters of the matter in the “search field”
 - You can search as per alphabet
 - You can search by contact
 - You can search by filter
3. How do I sort my matters?
 - Matters can be sorted by clicking heading above the column containing the sort parameter of interest
 - The first click will sort the column information in an ascending fashion; a second click will sort in a descending fashion
4. How do I view the matters associated to me?
 - “All matters” will list the matters that is visible to all the users within the lawfirm
 - “My matter” will list the matter where you are the lead lawyer
5. Can I associate a matter with another matter, how do I do that?
 - You can associate a matter to another matter called as the parent matter
 - Click “the action icon” located at the extreme right of the matter homepage
 - Click on “edit”
 - In the parent matter option select the matter that needs to be linked
 - Then click on “save & exit”
6. How do I edit a matter?
 - Click “the action icon” located at the extreme right of the matter homepage
 - Click on “edit”
 - Edit the required information
 - Then click on “save & exit”

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard. The 'Matters' section is active, displaying a table of matters. A red box highlights the action menu for a matter, which includes options like 'Edit', 'Deactivate', 'Comment', 'Document', 'History', 'Add Task', 'Add Issue', 'Add Fact', 'Add Research', 'Add Bill', and 'Add Receipt'.

Matter ID	Matter Name	Main/Sub	Type	Contact	
0 / 0	UID12845	Abduction of Lara Thomas	Main	Litigation	Henry Thomas
0 / 0	358-9658	Accident Case	Main	Litigation	Elaine Roberts
0 / 0	HN658MLA	Child Abuse	Main	Litigation	Lawrence Ru...
0 / 0	CAM05-10	Cooperative Housing Law	Main	IP	Carolyn Ritz
0 / 0	UID5698	Defamation	Main	Litigation	Preece Campbell
0 / 0	EL356/2000	Environmental Law	Main	Litigation	Rebecca Finch
0 / 0	grm123567	Gram Panchayat	Main	Litigation	Bolton W
0 / 0	UID 52361	Jayson Hamlet Home Registration	Main	IP	Jayson
0 / 0	UID52369	John Summers v/s ABPL Corp Ltd	Main	Litigation	John
0 / 0	PI3456	Mary Luis v. Progressive Insurance Co.	Main	Litigation	Mary Luis
0 / 0	PI0001/25	Mike Pilgrim v/s John Woods	Main	Litigation	Mike Pilgrim
0 / 0	US2401	Trinity vs Shoemaker Shoe Co.	Main	Litigation	Robinson Gilman

7. How do I comment on a matter?
 - Click on “the action icon” located at the extreme right of the matter homepage
 - Then click on “Comment” from the action pad
8. Where can I view the past comments of a matter?
 - Click on “the action icon” located at the extreme right of the matter homepage
 - Then click on “Comment” from the action pad
 - The matter face box that appears will have all the past comments
9. How do I add a new document?
 - Click on “the action icon” located at the extreme right of the matter homepage
 - Then click on “Document” from the action pad
 - “Browse” for the document and fill in the required information
 - Then click on “upload”
10. How do I download a document?
 - Click on “the action icon” located at the extreme right of the matter homepage
 - Click on “Document” from the action pad
 - Click on the “download icon” from the action pad within the document face box
 - Then click on “open/save” the file
11. Where can I view the client uploaded documents?
 - Click on the client documents column which is to the left of matter ID column on the matter homepage

LIVIA Access | LIVIAN - Instructions | Edward Philips
Password | Logout

Home Mail Workspace Repository Notes

Business Contacts Accounts Opportunities **Matters** Time & Expense Campaigns Reports & Dashboard

Home > Matters Add Form to Favorites

Matter - Reports

- Matter Master
- Matter Time Spent
- Matter Task Status
- Matter Tasks - Legal team
- Matter Distribution
- Matter Duration & Ageing
- Favorite Reports**

Matters

My Matters All Matters Filter

Status Open Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Reset

	Matter ID	Matter Name	Main/Sub	Type	Contact	Account	Matter Inception Date	Lead Lawyer	Actions
0/0		Abduction of Lara Thomas	Main	Litigation	Cameron Chan...	ADM Inc.	06/09/2010	Rose Dawson	
0/0	452/8965...	Airplane Crash Litigation	Main	Litigation	Marc Myers	Myers Inc	05/19/2010	Edward Philips	[A]
0/0	CAM	Cooperative Housing Law	Main	IP	Mark Karlovski		05/31/2010	Edward Philips	[A]
0/0	K&S/...	Copyright Infringement	Main	Litigation	Sean Brennan	Bright Comun...	05/26/2010	Peter Smith	[A]
0/0	K&S/...	Copyright Infringement - 05	Main	Litigation	Sean Brennan	Bright Comun...	05/06/2010	Edward Philips	[A]
0/0	ACP-56	Defaulted Payments	Main	Litigation	Michael Tang	James Invest...	06/16/2010	Soloman Jones	[A]
3/0	454-8526	Incorporation of a Company for Ms. Stern	Main	IP	Stephanie Stern	ACE	02/02/2010	Edward Philips	[A]
0/0		Interim Matter	Main	IP	Allan Nash		09/27/2010	Rose Dawson	[A]
0/0		Net is slow man. Unable to test. Do something	Main	IP	Barbara Cashman	Allan sports...	09/29/2010	Edward Philips	[A]
0/0	2158-86	Registration of Trademark	Main	IP	Tina Brown	Dupont		Peter Smith	[A]
0/0	KS.Pet/594	Restraints of Trade	Main	Litigation	Graham Smith	ACE		Peter Smith	[A]
0/0		Spousal Support	Main	Litigation	Leon Kruger	Kruger steel...		Peter Smith	[A]
0/0		Title Dispute	Main	Litigation	Cameron Chan...	ADM Inc.		Edward Philips	[A]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Reset

Displaying all 13

12. Where can I view the client posted comments?

- Click on the client comment column which is to the left of matter ID column on the matter homepage

13. How do I create a new task item?

- Click on “the action icon” located at the extreme right of the matter homepage
- Click on “add task” from the action pad
- Fill in the required information
- Then click on “save”

14. Can I assign tasks to other users?

- The tasks can only be assigned to the attorneys mentioned in the matter legal team

15. How do I filter my tasks?

- The tasks can be sorted by clicking heading above the column
- The first click will sort the column information in an ascending fashion; a second click will sort in a descending fashion
- You can also filter the tasks by all, open overdue or complete

16. Can I edit a task, how do I do that?

- A task can be edited
- You need select the “matter”
- Click on “task”
- Click on “the action icon” located at the extreme right of the task homepage
- Click on “edit”
- Edit the required information
- Then click on “save & exit”

17. What if I need to comment on a matter task?
- You need select the “matter”
 - Click on “task”
 - Click on “the action icon” located at the extreme right of the task homepage
 - Click on “comment”
 - From the comment face box add the comment
 - Then click on “add comment”
18. What if I need to add a document to a matter task?
- You need select the “matter”
 - Click on “task”
 - Click on “the action icon” located at the extreme right of the task homepage
 - Click on “document”
 - Browse for the document
 - Fill in the required information
 - Then click on “upload”
19. How do I use the time & exp tab within the matter task?
- The time tab within the matter task enables you to, create time entries in the context of the current matter
20. How do I create a new issue?
- Click on “the action icon marked in a green circle” located at the extreme right of the issue homepage
 - You can also click on the “action pad” located at the extreme right of the matter home page
 - Click on “add issue”
 - Fill in the required information
 - Then click on “save” or “save & exit”
21. Can I edit an issue, how do I do that?
- An issue can be edited
 - You need select the “matter”
 - Click on “issue”
 - Click on “the action icon” located at the extreme right of the issue homepage
 - Click on “edit”
 - Edit the required information
 - Then click on “save & exit”
22. What if I need to comment on an issue?
- You need select the “matter”
 - Click on “issue”
 - Click on “the action icon” located at the extreme right of the issue homepage
 - Click on “comment” From the comment face box add the comment
 - Then click on “add comment”
23. What if I need to add a document to an issue?
- You need select the “matter”
 - Click on “issue”

- Click on “the action icon” located at the extreme right of the task homepage
- Click on “document”
- Browse for the document
- Fill in the required information
- Then click on “upload”

24. How can I delete an issue?

- You need select the “matter”
- Click on “issue”
- Click on “the action icon” located at the extreme right of the task homepage
- Click on “deactivate”

25. Can an issue be linked to a task?

- You need select the “matter”
- Click on “issue”
- Click on “the action icon” located at the extreme right of the task homepage
- Click on “link tasks”
- Select the task that needs to get linked to the issue
- The click on save

26. Can an issue be linked to facts?

- You need select the “matter”
- Click on “issue”
- Click on “the action icon” located at the extreme right of the task homepage
- Click on “link facts”
- Select the facts that needs to get linked to the issue
- The click on save

27. What if the issue is resolved?

- You need select the “matter”
- Click on “issue”
- Click on “the action icon” located at the extreme right of the task homepage
- Click on “resolve”
- Mention the resolved date
- Enter the resolution
- Then click on save

28. How do I create a new fact?

- Click on a matter
- Click on “the action icon marked in a green circle” located at the extreme right of the fact homepage
- You can also click on the “action pad” located at the extreme right of the matter home page
- Click on “add issue”
- Fill in the required information
- Then click on “save” or “save & exit”

29. Can I edit a fact, how do I do that?

- A fact can be edited
- You need select the “matter”
- Click on “fact”
- Click on “the action icon” located at the extreme right of the fact homepage
- Click on “edit”
- Edit the required information
- Then click on “save & exit”

30. What if I need to comment on a fact?

- You need select the “matter”
- Click on “fact”
- Click on “the action icon” located at the extreme right of the fact homepage
- Click on “comment”
- From the comment face box add the comment
- Then click on “add comment”

31. What if I need to add a document to an issue?

- You need select the “matter”
- Click on “fact”
- Click on “the action icon” located at the extreme right of the fact homepage
- Click on “document”
- Browse for the document
- Fill in the required information
- Then click on “upload”

32. I want to link other issue to the fact, how do I do that?

- You need select the “matter”
- Click on “fact”
- Click on “the action icon” located at the extreme right of the fact homepage
- Click on “link issue”
- Select the issue that needs to get linked
- Then click on “link”

33. How do I create a new research?

- Click on a matter
- Click on “research”
- Click on “the action icon marked in a green circle” located at the extreme right of the research homepage
- You can also click on the “action pad” located at the extreme right of the matter home page
- Click on “add research”
- Fill in the required information
- Then click on “save” or “save & exit”

34. Can I edit a research, how do I do that?

- A research can be edited
- You need select the “matter”
- Click on “research”
- Click on “the action icon” located at the extreme right of the research homepage
- Click on “edit”
- Edit the required information
- Then click on “save & exit”

35. What if I need to comment on a research?

- You need select the “matter”
- Click on “research”
- Select the particular research
- Click on the add comments icon
- It will display the add comments Page.
- Add comments in the comments column
- Click "Add Comment"

36. What if I need to add a document to a research?

- You need select the “matter”
- Click on “research”
- Click on “the action icon” located at the extreme right of the research homepage
- Click on “document”
- Browse for the document
- Fill in the required information
- ‘

37. I want to link other issue to the research, how do I do that?

- You need select the “matter”
- Click on “research”
- Click on “the action icon” located at the extreme right of the fact homepage
- Click on “link issue”
- Select the issue that needs to get linked
- Then click on “link”

38. Can I upload document directly to a matter, how do I do that?

- You can directly upload documents to a matter
- You need select the “matter”
- Click on “documents”
- Click on “upload document” which is at the extreme right of the document home page
- Browse for the document
- Enter the required information
- Then click “upload”

39. How do I give my documents private access?

- Select the document
- Click on “private”
- Then click on “upload”

40. How do I give my documents public access?

- Select the document
- Click on “public”
- Then click on “upload”

41. How do I give the matter people access to the document?

- Select the document
- Click on “matter view”
- Then click on “upload”

42. Can I add bills to a matter, how do I do that?

- You can add bill to a matter
- You need select the “matter”
- Click on “billing & retainer”
- In the billing tab click on “Add” which is at the extreme right of the billing tab
- Fill in the required information
- Then click on “save”

43. Can I add receipts to the matter billing?

- You can add receipts to a matter
- You need select the “matter”
- Click on “billing & retainer”
- In the retainer/ bill receipt tab click on “Add” retainer receipt which is at the extreme right of the retainer/ bill receipt tab
- Fill in the required information
- Then click on “save”

FAQ – TIME & EXPENSE

Q1: How to add a New Time Entry selecting Matter?

- Click on the desired date in Calendar view.
- Click on Add Time Entry Button
- Search Matter/Select from dropdown it auto populates the associated contact.
- Upload the document if required
- Enter start time & end time, or duration.
- Select Activity Type.
- Enter the description.
- Override rate is picked up from admin if defined for that lawyer (Billing rates for that Employee).
- Check the billable checkbox.
- Click on Save & Exit.

Time and Expense Entries for Soloman Jones

Month View

10/14/2010

Time Accounted: 0.0 Hrs Time Billed: 0.0 Hrs (\$ 0) Expenses Accounted: \$ 0 Expenses Billed: \$ 0 Grand Total: \$ 0

T.E	Int.	Matter-Contact	Time (HH:MM)	Dur (Hrs)	Rate (\$)	Activity	Description	Billable	Billing	Final Bill Amt (\$)	Status	Action
No record(s) found.												

[Add Time Entry](#) [Add Expense Entry](#)

T/E: Time & Expense, T: Time, Dur: Duration, Amt: Amount, Dis: Discount, OA: Override Amt, Attch: Attachment, M: Matter, C: Contact, Fa: Fee

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Time & Expense

New Time & Associated Expenses

Date: 10/14/2010

Matters: Search

Contact: Search

Internal: ☒

Activity type: Arbitration

Description:

Start Time: 00:00 PM End Time: 00:00 PM Duration(hrs):

Rate(\$/hr):

Billable:

☐ Full \$ 0.0

☐ Discount (%)

☐ Override Amt (\$)

Final Bill Amt: (\$)

Attachment: Browse

Save & Add Associated Expense Save & Exit Cancel

Q2: How do I add a New Time Entry selecting Contact?

- Click on the desired date in Calendar view.
- Click on Add Time Entry Button
- Search Contact/ Select from dropdown.
- Upload the document if necessary.
- Enter start time & end time, or duration.
- Select Activity Type.
- Enter the description.
- Override rate is picked up from admin if defined for that lawyer (Billing rates for that Employee).
- Check the billable checkbox.
- Click on Save & Exit.

Time and Expense Entries for Soloman Jones

Month View

10/14/2010

Time Accounted: 0.0 Hrs Time Billed: 0.0 Hrs (\$ 0) Expenses Accounted: \$ 0 Expenses Billed: \$ 0 Grand Total: \$ 0

T.E	Int.	Matter-Contact	Time (HH:MM)	Dur (Hrs)	Rate (\$)	Activity	Description	Billable	Billing	Final Bill Amt (\$)	Status	Action
No record(s) found.												

Add Time Entry Add Expense Entry

T/E:- Time & Expense, T:- Time, Dur:- Duration, Amt:- Amount, Dis:- Discount, OA:- Override Amt, Atch:- Attachment, M:- Matter, C:- Contact, Fe:- Fee

LIVIA Access | LIVIA - Instructions | Solomon Jones
 Password | Logout
 Home | Mail | Workspace | Repository | Notes

Business Contacts | Accounts | Opportunities | Matters | **Time & Expense** | Campaigns | Reports & Dashboard

Home > Time & Exp Entry > New Time Entry [Add Form to Favorites](#)

New Time & Associated Expenses

Date * 10/14/2010
 Matters Search
 Contact Search
 Internal: ☒
 Activity type Arbitration
 Description *

Start Time 00:00 PM End Time 00:00 PM Duration(hrs) *

Rate(\$/hr) *
 Billable
☐ Full \$ 0.0
☐ Discount (%)
☐ Override Amt (\$)
 Final Bill Amt : (\$)
 Attachment Browse...

Save & Add Associated Expense Save & Exit Cancel

Powered by Livia Support

Q3: How do I Add and Save an Associated Expenses?

- After entering the time entry click on Add & Save Associated Expense.
- Select Expense Type from the dropdown.
- Enter the description.
- Enter the expense amount.
- Check the Billable Checkbox.
- Upload the document.
- Save & Exit or Cancel

LIVIA Access | LIVIA - Instructions | Solomon Jones
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 Home | Mail | Workspace | Repository | Notes

Business Contacts | Accounts | Opportunities | Matters | **Time & Expense** | Campaigns | Reports & Dashboard

Home > Time & Exp Entry > New Time Entry [Add Form to Favorites](#)

New Time & Associated Expenses

Date * 10/14/2010
 Matters Search
 Contact Search
 Internal: ☒
 Activity type Arbitration
 Description *

Start Time 00:00 PM End Time 00:00 PM Duration(hrs) *

Rate(\$/hr) *
 Billable
☐ Full \$ 0.0
☐ Discount (%)
☐ Override Amt (\$)
 Final Bill Amt : (\$)
 Attachment Browse...

Save & Add Associated Expense Save & Exit Cancel

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Expenses - Entry Form

Expense type	Description	Expense amt	Billable	Billing	Final bill amt(\$)	Action
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A
Car Rental			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override (\$) <input type="text"/>	\$ 0.0	A

Save & Exit
Cancel

Q4: How do I add a New Expense Entry by selecting Matter/Contact?

- Click on Add Expense Entry button.
- Search Matter or Contact.
- Select Activity Type.
- Enter the Description.
- Enter the expense amount.
- Check the billable checkbox.
- Upload the document.
- Click on Save & Exit Or Cancel

LIVIA

LIVIAN Access | LIVIAN - Instructions | Soloman Jones
Password | Logout

Home | Mail | Workspace | Repository | Notes

Business Contacts | Accounts | Opportunities | Matters | Time & Expense | Campaigns | Reports & Dashboard

Home > Time & Exp. Entry > Time and Expense Entries

Add Form to Favorites

Time and Expense Entries for Soloman Jones

Month View

10/14/2010

Time Accounted : 0.0 Hrs

Time Billed : 0.0 Hrs (\$ 0)

Expenses Accounted : \$ 0

Expenses Billed : \$ 0

Grand Total : \$ 0

T.E	Int.	Matter-Contact	Time (HH:MM)	Dur (Hrs)	Rate (\$)	Activity	Description	Billable	Billing	Final Bill Amt (\$)	Status	Action
No record(s) found.												

Add Time Entry
Add Expense Entry

T/E: Time & Expense, T: Time, Dur: Duration, Amt: Amount, Dis: Discount, OA: Override Amt, Atch: Attachment, M: Matter, C: Contact, Fa: From

Powered by Livia

Support

Business Contacts Accounts Opportunities Matters Time & Expense Campaigns Reports & Dashboard

Home > Time & Expense Entry > New Expense Entry

Expenses - Entry Form

Date	Int	Matter Contact	Expense type	Description	Expense Amt \$	Billable	Billing	Final Bill Amt	Action
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A
12/02/2010	<input checked="" type="checkbox"/>	M: Search C: Search	Car Rent			<input type="checkbox"/>	<input type="radio"/> Full \$ 0.0 <input type="radio"/> Discount (%) <input type="radio"/> Override (\$)	\$ 0.0	A

Save & Exit Cancel

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Q5: How do I give a discount?

- Click on Time Entry button.
- Search Matter or select Contact.
- Select Activity Type from the dropdown.
- Enter the description.
- Enter start time & end time, or duration
- Check the billable checkbox.
- Click on Discount radio button and enter the discount value.
- Upload the document.
- Click on Save & Exit.

Q6: How do I Override an amount? (Same applies to Expense Entry)

- Click on Add Expense Entry button. Search Matter or select Contact.
- Select Expense Type from the dropdown.
- Enter the description.
- Enter the Expense Amount.
- Check the billable checkbox.
- Click on Override radio button & enter the amount.
- Upload the document.

- Click on Save & Exit.

Q7: How do I add a New Internal Expense Entry? (Same Applies to Time Entry)

- Click on Add Expense Entry. Don't search or select the matter/contact from the dropdown.
- Select Activity Type.
- Enter the Description.
- Enter the expense amount.
- Upload the document.
- Click on Save & Exit.

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Home, Mail, Workspace, Repository, and Notes. The main navigation bar has tabs for Business Contacts, Accounts, Opportunities, Matters, Time & Expense (selected), Campaigns, and Reports & Dashboard. The sidebar on the left contains a 'Time and Expenses Reports' section with a 'Manage Billing' link highlighted. The main content area displays a 'Time Account' report for October 2010. The report shows a calendar grid with time and expense data for each day. The total time accounted for is 73.8 hrs, and the total time billed is 73.8 hrs. The total amount is \$11,390.

Week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
39	27 Time Accounted: 8.1 hrs Time Billed: 8.1 hrs Total Amt: \$1,460	28 Time Accounted: 8.6 hrs Time Billed: 8.6 hrs Total Amt: \$1,176	29 Time Accounted: 11.8 hrs Time Billed: 11.8 hrs Total Amt: \$2,008	30 Time Accounted: 8.1 hrs Time Billed: 8.1 hrs Total Amt: \$1,306	1 Time Accounted: 7.6 hrs Time Billed: 7.6 hrs Total Amt: \$1,168	2	3
40	4 Time Accounted: 10.7 hrs Time Billed: 10.7 hrs Total Amt: \$1,607	5 Time Accounted: 7.7 hrs Time Billed: 7.7 hrs Total Amt: \$1,414	6 Time Accounted: 9.6 hrs Time Billed: 9.6 hrs Total Amt: \$1,380	7 Time Accounted: 8.9 hrs Time Billed: 8.9 hrs Total Amt: \$1,372	8 Time Accounted: 7.8 hrs Time Billed: 7.8 hrs Total Amt: \$1,321	9	10
41	11 Time Accounted: 9.0 hrs Time Billed: 9.0 hrs Total Amt: \$1,436	12 Time Accounted: 3.2 hrs Time Billed: 3.2 hrs Total Amt: \$520	13 Time Accounted: 9.3 hrs Time Billed: 9.3 hrs Total Amt: \$1,172	14	15	16	17
42	18	19	20	21	22	23	24
43	25	26	27	28	29	30	31

Time and Expense: Matter Billing

Start Date: End Date: Matter: Status: Go

10/29/2010 • Time Accounted: 130.82 Hrs • Time Billed: 128.63 Hrs (\$ 21,646.75) • Time Accounted: \$ 82.95 • Expenses Billed: \$ 82.95 • Grand Total: \$ 21,729.7

Time and Expense Entries for matter "Abduction of Lara Thomas"

T/E	Date	Lawyer Designation	Time (H:M:MM)	Dur Hrs	Rate (\$)	Activity	Description	Billable	Billing	Final Bill Amt (\$)	Status	Actions
Q	09/01/2010	Edward Philips Senior Associate	Fm To	4.0	200.0	Consultation	Follow up : Receipt No. BR212345555	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 800.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	800	Approved	
Q	09/01/2010	Edward Philips Senior Associate	Fm To	1.0	77.95	Others	Notice and service fee	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 77.95 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	77.95	Open	
Q	09/06/2010	Edward Philips Senior Associate	Fm To	5.2	160.0	Others	Attendance at Board meeting to discuss various Publishing issues.	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 832.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	832	Open	
Q	09/06/2010	Edward Philips Senior Associate	Fm To	2.3	240.0	Others	Review of e-mail from client regarding publication of new book; review of responsive e-mails; draft and forward responses to the concerned individuals	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 552.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	552	Open	
Q	09/06/2010	Edward Philips Senior Associate	Fm To	1.5	180.0	E Mail	Email on client's behalf	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 270.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	270	Open	
Q	09/07/2010	Edward Philips	Fm To	4.9	140.0	Research	Research - contract disputes; licensing	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Full \$ 686.0 <input type="radio"/> Discount (%) <input type="text"/> <input type="radio"/> Override \$ <input type="text"/>	686	Open	

Q8: How do I to View the matter billing for particular matter?

- In calendar view, click on Manage Billing- Matter Billing.
- Enter the start date & end date.
- Select the Matter from the dropdown
- Don't select the Status from the dropdown list.
- Click Go.

Q9: How do I view the matter billing for Status (Open)?

- In calendar view, click on Manage Billing- Matter Billing.
- Enter the start date & end date.
- Select the Matter from the dropdown
- Select the Status = Open from the dropdown list.
- Click Go

Q10: How do I view the matter billing for Status (Approved)?

- In calendar view, click on Manage Billing- Matter Billing.
- Enter the start date & end date.
- Select the Matter from the drop down
- Select the Status= Approved from the dropdown
- Click Go

Q11: How do I view the matter billing for Status (Billed)?

- In calendar view, click on Manage Billing- Matter Billing.
- Enter the start date & end date.
- Select the Matter from the drop down
- Select the Status= Billed from the dropdown

- Click Go

Q12: How do I view Pre- Sales billing for particular contact for all status?

- In calendar view, click on Manage Billing- Pre-Sales Billing.
- Enter the start date & end date.
- Select the Contact from the dropdown
- Don't select the Status from the dropdown list
- Click Go.

Q13: How do I view Pre- Sales billing for particular contact for Status (Open)?

- In calendar view, click on Manage Billing- Pre-Sales Billing.
- Enter the start date & end date.
- Select the Contact from the dropdown
- Select the Status= Open from the dropdown
- Click Go

Q14: How do I view Pre- Sales billing for particular contact for Status (Approved)?

- In calendar view, click on Manage Billing- Pre-Sales Billing.
- Enter the start date & end date.
- Select the Contact from the dropdown
- Select the Status= Approved from the dropdown
- Click Go

Q15: How do I view Pre- Sales billing for particular contact for Status (Billed)?

- In calendar view, click on Manage Billing- Pre-Sales Billing.
- Enter the start date & end date.
- Select the Contact from the dropdown
- Select the Status= Billed from the dropdown
- Click Go

Q16: How do I View the Internal working hours of the Time and Expense Entries?

- In calendar view, click on Manage Billing- Internal Working Hours
- Enter the start date & end date.
- Click Go

Q17: If it's a New Time Entry how do I Keep the Duration Field Blank?

- Click on Add Time Entry Button
- Search or select the Matter/ Contact from the dropdown.
- Upload the document.
- Don't fill the Start & End time,
- Keep the duration field blank.
- Select Activity Type.
- Enter the description.
- Override rate is picked up from admin if defined for that lawyer (Billing rates for that Employee).
- Check the billable checkbox.
- Click on Save & Exit.

Q18: If it's a New Time Entry how do I Keep the Description field Blank?

- Click on Add Time Entry Button.
- Search or select the Matter/ Contact from the dropdown.
- Upload the document.
- Don't fill the Start & End Date, enter the duration.
- Select Activity Type.
- Keep the description field blank.
- Override rate is picked up from admin if defined for that lawyer (Billing rates for that Employee).
- Check the billable checkbox.
- Click on Save & Exit.

Q19: How do I change the status to Open/Approved/Billed for Time Entry & its Associated Expense Entry under Matter Billing – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date.
- Select the Contact from the drop down.
- Don't select any status from dropdown
- Click Go.
- Change the status of the Time entry to Open/Approved/Billed.

Q20: How do I change the status from Approved to Billed for Time Entry & its Associated Expense Entry under Matter Billing – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date.
- Select the Matter from the drop down.
- Select the Status Approved from drop down
- Click Go.
- Change the status of the Time entry to Billed.

Q21: How do I change the status from Approved to Open for Time Entry & its Associated Expense Entry under Matter Billing – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date
- Select the Matter from the dropdown
- Select the Status Approved from Drop down
- Click Go
- Change the status of the Time entry to Open

Time and Expense: Matter Billing

Start Date: 1/1/2010 End Date: 10/29/2010 Matter: Abduction of Lara Status: Go

10/29/2010 • Time Accounted: 130.82 Hrs • Time Billed: 128.63 Hrs (\$ 21,646.75) • Expenses Accounted: \$ 82.95 • Expenses Billed: \$ 82.95 Grand Total: \$ 21,729.7

Time and Expense Entries for matter "Abduction of Lara Thomas"

T.E.	Date	Lawyer Designation	Time (HH:MM)	Dur Hrs	Rate (\$)	Activity	Description	Billable	Billing	Final Bill Amt (\$)	Status	Actions
09/01/2010	Edward Philips Senior Associate	Fm To	4.0	200.0	Consultation	Follow up - Receipt No. BR212345555	<input checked="" type="checkbox"/>	Full \$ 800.0 Discount (%) Override \$	800	Approved	Edit Deactivate Comment Document History Add More Expenses Upload Document Delete View Deleted Entries Change Date	
09/01/2010	Edward Philips Senior Associate	Fm To	1.0	77.95	Others	Notice and service fee	<input checked="" type="checkbox"/>	Full \$ Discount (%) Override \$				
09/06/2010	Edward Philips Senior Associate	Fm To	5.2	160.0	Others	Attendance at Board meeting to discuss various Publishing issues.	<input checked="" type="checkbox"/>	Full \$ Discount (%) Override \$				
09/06/2010	Edward Philips Senior Associate	Fm To	2.3	240.0	Others	Review of e-mail from client regarding publication of new book; review of responsive e-mails; draft and forward responses to the concerned individuals	<input checked="" type="checkbox"/>	Full \$ 552.0 Discount (%) Override \$	552	Open		
09/06/2010	Edward Philips Senior Associate	Fm To	1.5	180.0	E Mail	Email on client's behalf	<input checked="" type="checkbox"/>	Full \$ 270.0 Discount (%) Override \$	270	Open		
09/07/2010	Edward Philips Senior Associate	Fm To	4.9	140.0	Research	Research - contract disputes; licensing and afterwards fees; the board office	<input checked="" type="checkbox"/>	Full \$ 686.0 Discount (%) Override \$	686	Open		

Q22: How do I Add More Expenses, Upload a Document, Delete an Entry, View Deleted Entries and Change a Date in Matter Billing?

- Enter the start date & end date
- Select the Matter from the dropdown
- Don't Select the Status
- Click Go
- Under the Action Tab Select any of the Actions and Click on it.

Q23: How do I change the status to Open/Approved/Billed for Time Entry & its Associated Expense Entry under Internal Working Hours – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date.
- Click Go.
- Change the status of the Time entry
- To Open/ Approved/Billed

Q24: How do I change the status to Open to Approved for Time Entry & its Associated Expense Entry under Internal Working Hours – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date.
- Click Go.
- Change the status of the Time entry to
- Approved

Q25: How do I change the status to Approved to Billed for Time Entry & its Associated Expense Entry under Internal Working Hours – Change Status (Only if Lead Lawyer)?

- Enter the start date & end date.
- Click Go.
- Change the status of the Time entry to Billed.

Q26: How do I Edit Duration/Rate/Activity Type/Description for the Time entry under “Open Status”?

- Enter the start date & end date.
- Click Go.
- Click on duration /rate /description /activity type for the particular time entry
- Enter the new duration time/ rate/select activity type from dropdown/ description
- Click on Check to save new changes Or Click on cross for no edit

Q27: How do I Edit Billable. Check/uncheck Billable checkbox under “Open Status”?

- Enter the start date & end date
- Click Go
- Check/Uncheck the billable checkbox to edit time entry

Q28: How do I Edit Discount/Override Amt under “Open Status”?

- Enter the start date & end date.
- Click Go.
- Click on duration/rate/description/activity type for the particular time entry.
- Enter the discount value/ enter the override amt.
- Click on Check to save new changes or Click on cross for no edit.

FAQ- CAMPAIGNS

1. How to create a campaign?

- You can either create a new campaign or create a campaign from an existing campaign
- Select the “create new campaign icon with a green circle” which appears on the account home page
- Enter the required information
- Then click on save or save and exit

The screenshot shows the LIVIA web application interface. The top navigation bar includes links for Business Contacts, Accounts, Opportunities, Matters, Time & Expense, **Campaigns**, and Reports & Dashboard. The 'Campaigns' tab is highlighted. On the left, a sidebar shows 'Campaigns - Reports' with a list of report types: Campaign Status, Campaign Responsiveness, Campaign Contacts, Campaign Revenue, and Favorite Reports. The main content area displays a table of campaigns. A red box highlights the 'Add New Campaign' icon (a green circle with a plus sign) in the top right of the campaign list area.

Campaign	Owner	Status	Start Date	Closed Date	1st Mailed Date	Contacts	Total Responses	Unattended Responses	Opportunities	Value(\$)	Actions
Child Abuse	Dennis Gratton	Inprogress	07/21/10	07/30/10	07/22/2010	5	1(20%)	0	0	0	[A]
Family Issues	Dennis Gratton	Inprogress	10/28/10	11/04/10	08/10/2010	9	6(66%)	1	2(22.22%)	5,500	[A]
Labour Law	Dennis Gratton	Inprogress	08/11/10	08/25/10	08/10/2010	10	5(50%)	1	2(20.0%)	2,000	[A]
Land Disputes	Dennis Gratton	Planned	08/18/10	08/25/10		0	0	0	0	0	[A]
New Camp	Cory Heltz	Planned				1	1(100%)	1	0	0	[A]
Racial Discrimination	Dennis Gratton	Planned	09/02/10	09/09/10		0	0	0	0	0	[A]
Search Criteria	Cory Heltz	Planned				0	0	0	0	0	[A]
Seminar On Identity Theft	Cory Heltz	Planned	05/17/10	07/28/10		0	0	0	0	0	[A]

2. How can I search for my campaigns?

- You can enter the entire name of the campaign or the first three letters of the campaign in the “search field”
- You can search for campaigns as per alphabet
- You can search by contact
- You can also search by filter

3. Can I sort the campaigns?

- Campaign sorting can be done by clicking on campaign, Owner, status, start date, closed date or contacts.

4. How do I access the campaigns assigned to me?

- “All campaigns” will list the campaign that is visible to all the users within the law firm
- “My campaigns” will list the campaign assigned to you

5. How do I add the campaign members to the campaign?
 - You can select the campaign then add the campaign members.
 - The second way is you can by click the “action icon” located at the extreme right of the campaign homepage
 - Then click on “add campaign members”
 - You can select contacts from the existing list of contacts or add new contacts by importing a file
 - Once the contacts are selected click on “add to campaign”
 - If the contact list is being imported click on “import”
6. What is the use of mailers?
 - Via mailers you can send test emails
 - Send first emails
 - Save first emails
 - Send reminder emails
 - Save reminder emails
7. How do I send test emails?
 - Click on the campaign
 - Go to the “mailers tab”
 - Enter the email signature
 - Then click on “send test email”
8. How do I send the first email?
 - Click on the campaign
 - Go to the “mailers tab”
 - Enter the email signature
 - Enter the email address and the subject
 - Then click on Send First Email
9. How do I save the first email?
 - Click on the campaign
 - Go to the “mailers tab”
 - Enter the recipients email address and the subject
 - Then click on save First Email
10. How do I send reminder emails?
 - Click on the campaign
 - Go to the “mailers tab”
 - Enter reminder email
 - Then click on “send reminder email”
11. How do I save reminder emails?
 - Click on the campaign
 - Go to the “mailers tab”
 - Enter reminder email
 - Then click on “save reminder email”

12. Where can I view the campaign responses?

- Click on the campaign
- Click on “response reviews”
- Within that you’ll find “Unattended Responses” and “Attended Responses”
- You can also click on “the action icon” located at the extreme right of the campaign homepage
- Then click on “view unattended responses”

13. What are unattended and attended responses?

- Those responses that is not actioned by the livian/attorney is termed as unattended responses
- Those responses that actioned by the livian/attorney is termed as attended responses

14. What are the actions to convert a response to an attended response?

- You can create an opportunity
- You can suspend the response
- You can also reject the response

15. When do I suspend a campaign respondent?

- If a respondent is not interested in a campaign at the moment but would like to be contacted later

16. Where would I find the suspended respondents?

- Click on the campaign
- Click on “suspended list”
- You can also click on “the action icon” located at the extreme right of the campaign homepage
- Then click on “view suspended list”

17. What are the actions for suspended respondents?

- You can create an opportunity
- You can reject the respondent

18. How do I edit the information about the campaign?

- You can edit the campaign information anytime by clicking “the action icon” located at the extreme right of the campaign homepage.
- Then click on “edit” from the action pad and edit the necessary details

19. How do I comment on a campaign?

- Click on “the action icon” located at the extreme right of the campaign homepage
- Then click on “Comment” from the action pad

20. How do I view the past comments of the campaign?

- Click on “the action icon” located at the extreme right of the campaign homepage
- Then click on “Comment” from the action pad
- The face box that appears will have all the past comments

21. How do I add a new document?

- Click on “the action icon” located at the extreme right of the campaign homepage
- Then click on “Document” from the action pad
- “Browse” for the document and fill in the required information
- Then click on “upload”

22. How do I replace a document?

- Click on “the action icon” located at the extreme right of the campaign homepage
- Click on “Document” from the action pad
- Click on the “Replace icon” from the action pad within the document face box
- Upload the document
- Then click on save and exit

23. How do I download a document?

- Click on “the action icon” located at the extreme right of the campaign homepage
- Click on “Document” from the action pad
- Click on the “download icon” from the action pad within the document face box
- Then click on “open/save” the file

24. What information will the history tab provide?

- You can view the comments posted
- You can view any status update

25. If I would want to deactivate a campaign, how do I do this?

- You can deactivate the campaign by clicking “the action icon” located at the extreme right of the campaign homepage.
- Then click on “Deactivate” from the action pad

26. Where do I view the deactivate campaign?

- Click on “view deactivated campaign icon with a red circle” which appears on the opportunity home page
- Once clicked will give you a list of campaigns that are deactivated

27. How can I search for my campaigns?

- You can enter the entire name of the campaign or the first three letters of the campaign in the “search field”
- You can search as per alphabet
- You can search by contact
- You can search by filter

28. I would like to view how my opportunities are sorted, how do I do this?

- You can click on “manage campaign” which appears on the campaign home page
- Within manage campaign; the campaigns are listed as per the status

FAQ –DOCUMENT REPOSITORY

Q1: How Add/Upload a Document in Repository?

- Click on Add New.
- Upload the document.
- Enter the name of the document.
- Select the category Article/Template/Other.
- Select the Sub- Category Legal/General/Other.
- Enter the tag and the description.
- Click on Upload.

The screenshot displays the 'Public Repository' interface. On the left is a search sidebar. The main area shows a table of documents. An 'Upload Document' modal is open, with the 'Document' radio button selected. The 'Category' dropdown is set to 'Article' and the 'Sub Category' dropdown is set to 'Legal'. The 'Choose File' button is highlighted, indicating the next step in the upload process.

Name	Description	Category	Sub Category	Type	Uploaded by	Created	Actions
Guide to Law Online.docx		Other	Other	Document	Edward Philips	10/14/10	[A]
Episode 231: Routing W...		Article		Document	Soloman Jones	10/13/10	[A]
US Cruelty Statutes		Article		Document	Soloman Jones	10/13/10	[A]
Law Books		Article		Document	Soloman Jones	10/13/10	[A]
New					Soloman Jones	10/13/10	[A]
Regu					Soloman Jones	10/13/10	[A]
Case					Soloman Jones	10/13/10	[A]
Onlin					Soloman Jones	10/13/10	[A]
Guid					Soloman Jones	10/13/10	[A]
Envir					Soloman Jones	10/13/10	[A]
Stock					Soloman Jones	10/13/10	[A]
Differ					Soloman Jones	10/13/10	[A]
Mass					Soloman Jones	10/13/10	[A]
Child					Soloman Jones	10/13/10	[A]
CS o					Soloman Jones	10/13/10	[A]
Gene					Soloman Jones	10/13/10	[A]
American Study		Template		Document	Soloman Jones	10/13/10	[A]
Car Rental Invoice		Template		Document	Edward Philips	10/12/10	[A]
Hotel Booking Invoice		Template		Document	Edward Philips	10/12/10	[A]
Dinner bill		Template		Document	Edward Philips	10/12/10	[A]
Criminal Law.docx		Article		Document	Edward Philips	10/12/10	[A]
Bankruptcy.docx		Article		Document	Edward Philips	10/12/10	[A]
Superpages Website	Website To The Superpa...	Other		Link	Edward Philips	10/12/10	[A]
lawyers Webpage	Web Link To The Lawyer...	Other		Link	Edward Philips	10/12/10	[A]
Email		Other		Link	Edward Philips	10/12/10	[A]

Q2: How do I Edit the Document?

- Click on Add New.
- Upload the document.
- Enter the name of the document.
- Select the category Article/Template/Other.
- Select the Sub- Category Legal/General/Other.
- Enter the tag and the description.
- Click on Save.

Home > Repository

Search

Name of the document

Document Description

Document tag

Type of document extension

Search by Creator & Privilege

Uploaded By

When was it Created?

☐ Dont Remember

☐ Within the last week

☐ Past Month

☐ Within the past year

☐ Specify Date

☐ Modified Date

From:

To:

Search

Public Repository

Categories: All

Displaying all 25

Name	Description	Category	Sub Category	Type	Uploaded by	Created	Actions
Guide to Law Online.docx		Other	Other	Document	Edward Philips	10/14/10	[A]
Episode 231: Routing VW...		Article		Document	Edward Philips	10/13/10	[A]
US Cruelty Statutes		Article		Document	Edward Philips	10/13/10	[A]
Law Books		Article		Document	Edward Philips	10/13/10	[A]
New ESOP Regs		Article		Document	Edward Philips	10/13/10	[A]
Regulations Insurance		Article		Document	Edward Philips	10/13/10	[A]
Case Study 2		Article		Document	Edward Philips	10/13/10	[A]
Online Law		Article		Document	Soloman Jones	10/13/10	[A]
Guide to ESOP		Article		Document	Soloman Jones	10/13/10	[A]
Environmental Law		Article		Document	Soloman Jones	10/13/10	[A]
Stock Options		Article		Document	Soloman Jones	10/13/10	[A]
Different Codes		Article		Document	Soloman Jones	10/13/10	[A]
Massachusetts Regulations		Article		Document	Soloman Jones	10/13/10	[A]
Child Custody		Article		Document	Soloman Jones	10/13/10	[A]
CS on Animal Cruelty		Article		Document	Soloman Jones	10/13/10	[A]
General		Article		Document	Soloman Jones	10/13/10	[A]
American Study		Template		Document	Soloman Jones	10/13/10	[A]
Car Rental Invoice		Template		Document	Edward Philips	10/12/10	[A]
Hotel Booking Invoice		Template		Document	Edward Philips	10/12/10	[A]
Dinner bill		Template		Document	Edward Philips	10/12/10	[A]
Criminal Law.docx		Article		Document	Edward Philips	10/12/10	[A]
Bankruptcy.docx		Article		Document	Edward Philips	10/12/10	[A]
Superpages Website	Website To The Superpa...	Other		Link	Edward Philips	10/12/10	[A]
lawyers Webpage	Web Link To The Lawyer...	Other		Link	Edward Philips	10/12/10	[A]
Gmail		Other		Link	Edward Philips	10/12/10	[A]

Q3: How do I Download doc from Edit action?

- Click on the action pad, Edit action.
- Click on the document link to download the document.

Q4: How do I cancel the add document functionality?

- Click on Add New.
- Upload the document.
- Enter the name of the document.
- Select the category Article/Template/Other.
- Select the Sub- Category Legal/General/Other.
- Enter the tag and the description.
- Click on Cancel.

Public Repository

Categories: All

Displaying all 25

Name	Description	Category	Sub Category	Type	Uploaded by	Created	Actions
Guide to Law Online.docx		Other	Other	Document	Edward Philips	10/14/10	A
Episode 231: Routing W...		Article		Document	Soloman Jones	10/13/10	A
US Cruelty Statutes		Article		Document	Soloman Jones	10/13/10	A
Law Books		Article		Document	Soloman Jones	10/13/10	A
New					Soloman Jones	10/13/10	A
Regu					Soloman Jones	10/13/10	A
Case					Soloman Jones	10/13/10	A
Onlin					Soloman Jones	10/13/10	A
Guid					Soloman Jones	10/13/10	A
Envir					Soloman Jones	10/13/10	A
Stock					Soloman Jones	10/13/10	A
Differ					Soloman Jones	10/13/10	A
Mass					Soloman Jones	10/13/10	A
Child					Soloman Jones	10/13/10	A
CS or					Soloman Jones	10/13/10	A
Gene					Soloman Jones	10/13/10	A
American Study		Template		Document	Soloman Jones	10/13/10	A
Car Rental Invoice		Template		Document	Edward Philips	10/12/10	A
Hotel Booking Invoice		Template		Document	Edward Philips	10/12/10	A
Dinner bill		Template		Document	Edward Philips	10/12/10	A
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Bankruptcy.docx		Article		Document	Edward Philips	10/12/10	A
Superpages Website	Website To The Superpa...	Other		Link	Edward Philips	10/12/10	A
lawyers Webpage	Web Link To The Lawyer...	Other		Link	Edward Philips	10/12/10	A
Email		Other		Link	Edward Philips	10/12/10	A

Upload Document

☐ Document
☒ **Link**

Web Link:

Name:

Category: Sub Category:

Tag: Description:

Upload Cancel

Q5: How to add a Link to the repository?

- Click on Add New icon.
- Enter the Web link and the name.
- Select the category Article/Template/Other.
- Select the Sub- Category Legal/General/Other.
- Enter the tag and the description.
- Click on Upload.

Document Description

Document tag

Type of document extension

Search by Creator & Privilege
Uploaded By

When was it Created?
☐ Dont Remember
☐ Within the last week
☐ Past Month
☐ Within the past year
Specify Date
☐ Modified Date
From:
To:

Name	Description	Category	Sub Category	Type	Uploaded by	Created	Actions
Guide to Law Online.docx		Other	Other	Document	Edward Philips	10/14/10	
Episode 231: Routing VW...		Article		Document	Soloman Jones	10/13/10	
US Cruelty Statutes		Article		Document	Soloman Jones	10/13/10	
Law Books		Article		Document	Soloman Jones	10/13/10	
New ESOP Regs		Article		Document	Soloman Jones	10/13/10	
Regulations Insurance		Article		Document	Soloman Jones	10/13/10	
Case Study 2		Article		Document	Soloman Jones	10/13/10	
Online Law		Article		Document	Soloman Jones	10/13/10	
Guide to ESOP		Article		Document	Soloman Jones	10/13/10	
Environmental Law		Article		Document	Soloman Jones	10/13/10	
Stock Options		Article		Document	Soloman Jones	10/13/10	
Different Codes		Article		Document	Soloman Jones	10/13/10	
Massachusetts Regulations		Article		Document	Soloman Jones	10/13/10	
Child Custody		Article		Document	Soloman Jones	10/13/10	
CS on Animal Cruelty		Article		Document	Soloman Jones	10/13/10	
General		Article		Document	Soloman Jones	10/13/10	
American Study		Template		Document	Soloman Jones	10/13/10	
Car Rental Invoice		Template		Document	Edward Philips	10/12/10	
Hotel Booking Invoice		Template		Document	Edward Philips	10/12/10	
Dinner bill		Template		Document	Edward Philips	10/12/10	
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Bankruptcy.docx		Article		Document	Edward Philips	10/12/10	
Superpages Website	Website To The Superpa...	Other		Document	Edward Philips	10/12/10	
lawyers Webpage	Web Link To The Lawyer...	Other		Document	Edward Philips	10/12/10	
Gmail		Other		Document	Edward Philips	10/12/10	

Edit Deactivate
Comment Document History
Open Link Delete
Modify Tags

Powered by Livia
Support

Q6: How do I cancel the Link functionality?

- Click on Add New icon.
- Enter the Web link and the name.
- Select the `category Article/Template/Other.
- Select the Sub- Category Legal/General/Other.
- Enter the tag and the description.
- Click on Cancel.

Q7: How do I open a link?

- Go to Actions. Click the open Link icon.

Home > Repository

[Add Form to Favorites](#)

Public Repository

Categories:

Displaying all 25

Name	Description	Category	Sub Category	Type	Uploaded by	Created	Actions
Guide to Law Online.docx		Other	Other	Document	Edward Philips	10/14/10	A
Episode 231: Routing W...		Article		Document	Soloman Jones	10/13/10	A
US Cruelty Statutes		Article		Document	Soloman Jones	10/13/10	A
Law Books		Article		Document	Soloman Jones	10/13/10	A
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Stock Options		Article		Document	Soloman Jones	10/13/10	A
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Dinner bill		Template		Document	Edward Philips	10/12/10	A
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lawyers Webpage	Web Link To The Lawyer...	Other		Link	Edward Philips	10/12/10	A
Email		Other		Link	Edward Philips	10/12/10	A

Search filters (circled in red):

- Name of the document:
- Document Description:
- Document tag:
- Type of document extension:
- Search by Creator & Privilege:
 - Uploaded By:
- When was it Created?
 - ☐ Don't Remember
 - ☐ Within the last week
 - ☐ Past Month
 - ☐ Within the past year
 - ☐ Specify Date
 - From:
 - To:

Q8: How do I search a Document?

- Enter Document name in the search field. Enter the type of the document extension, check on include tag.
- Click on Search icon.

Q9: How do I search by Search by Creator & Privilege?

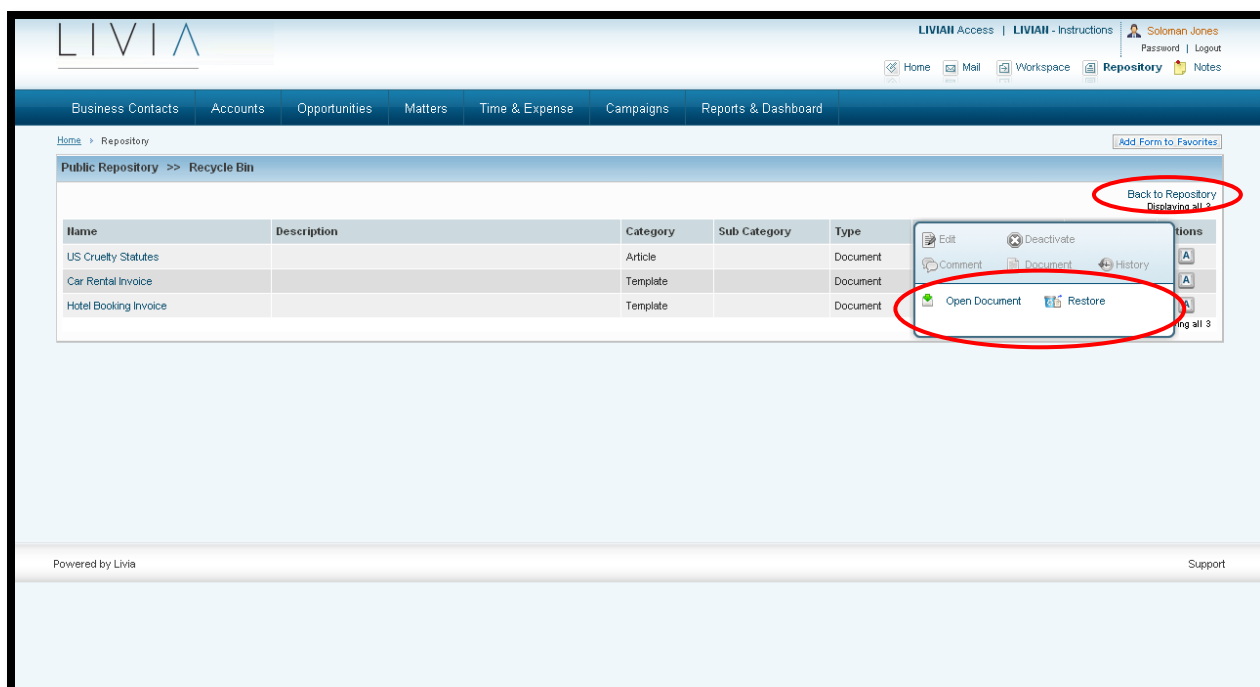
- Enter Document name in the search field. Enter the type of the document extension, check on include tag.
- Enter the Uploaded By and Author name.
- Click on Search

Q10: How do I Search by when it was created?

- Enter Document name in the search field. Enter the type of the document extension, check on include tag.
- Enter the Uploaded By and Author name.
- Check the radio button don't Remember/ Within the Last week/ Past Month/ Within the Past Year/ Specify Date (From -To).
- Click on Search

Q11: How do I Open/Download the document?

- Go to Actions. Click the open document icon.



Q12: How do I Restore a document back to Workspace?

- Click on recycle bin.
- Click on the action pad, Action : Restore

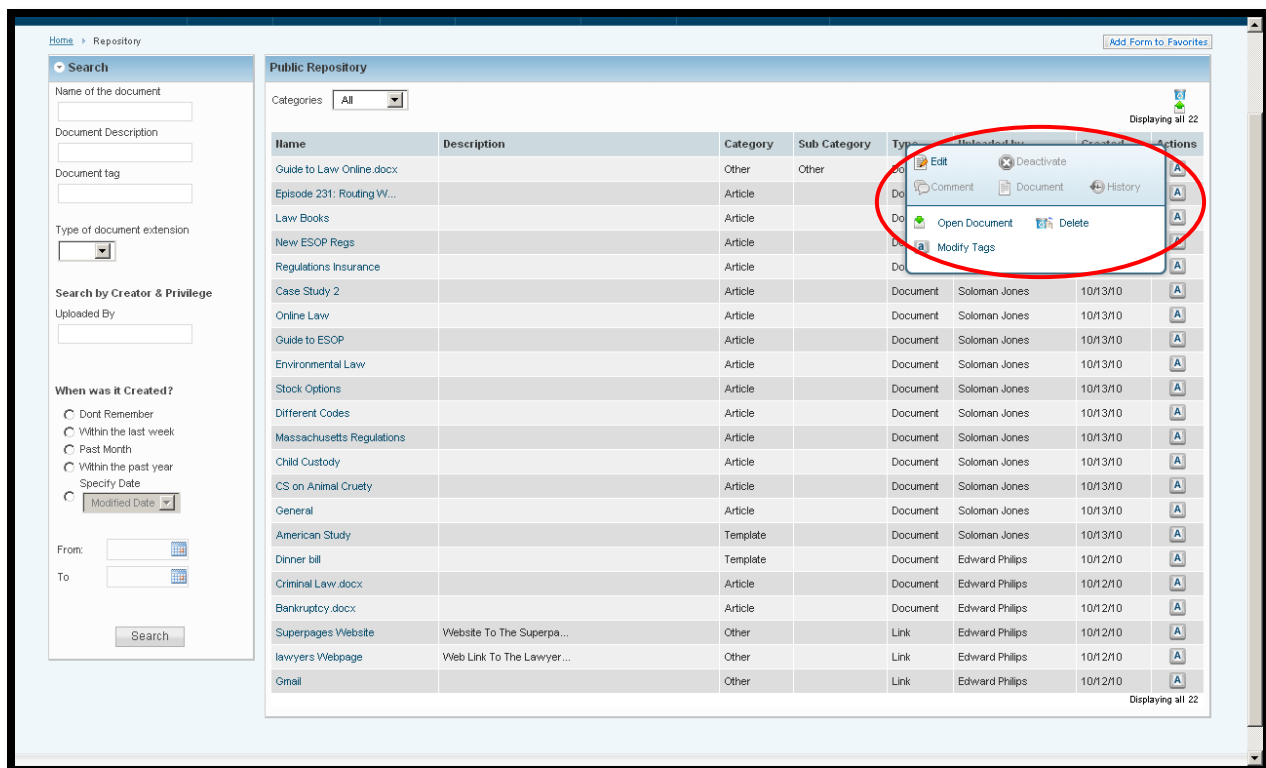
Q13: How do I Open Document?

- Click on the recycle bin.
- Click in the action pad, action : Open Document
- Click on save for saving the document or open.

Q14: How do I go back to Repository?

- Click on the Back to Repository link

- Click on the dropdown list of the categories.
- Select the categories All/Article/ Template/ Other.



Q16: How do I edit a document?

- Go to Actions. Click the Edit

Q17: How do I Delete a Document?

- Go to Actions. Click on Delete

Q18: Can I modify Tags?

- Yes you can Modify Tags

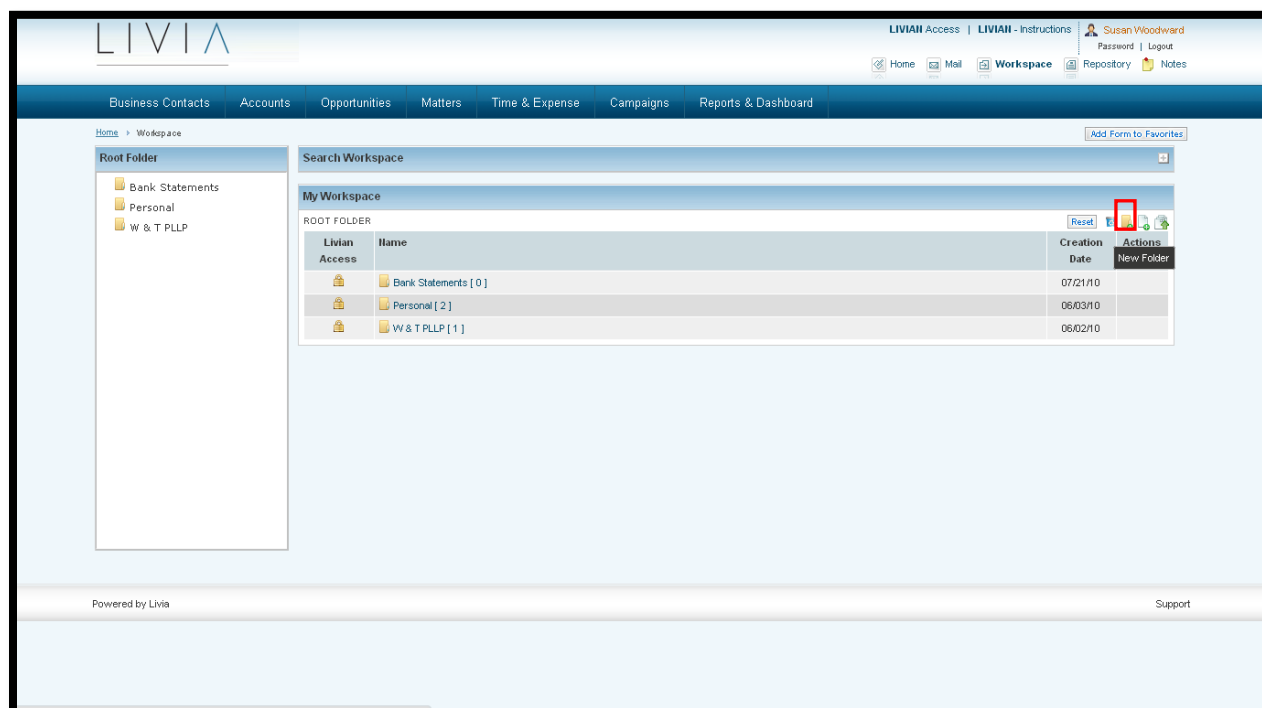
Q19: How do I Modify Tag?

- Go to Actions. Click on Modify Tag

FAQ - WORKSPACE

Q1: How do add a folder in Repository?

- Click on “ Workspace”
- Under My Workspace Click on Option “Create Folder”
- It will give you a Pop-Up to name the Folder
- Add the required name for the Folder
- Create



Q2: How do I Upload a File?

- Click on “ Workspace”
- Under My Workspace Click on Option “Upload File”
- Choose the File that you require to Upload
- Upload

Q3: What Kind of Files can I Upload under Workspace?

- Files of all types can be added to Workspace. (E.G. Any Links, MS Office Docs, Videos etc.)

Q4: What is the Space Limit that I get?

- (The answer to this question needs to be confirmed)

Q5: Can I Upload Multiple files at a time and how?

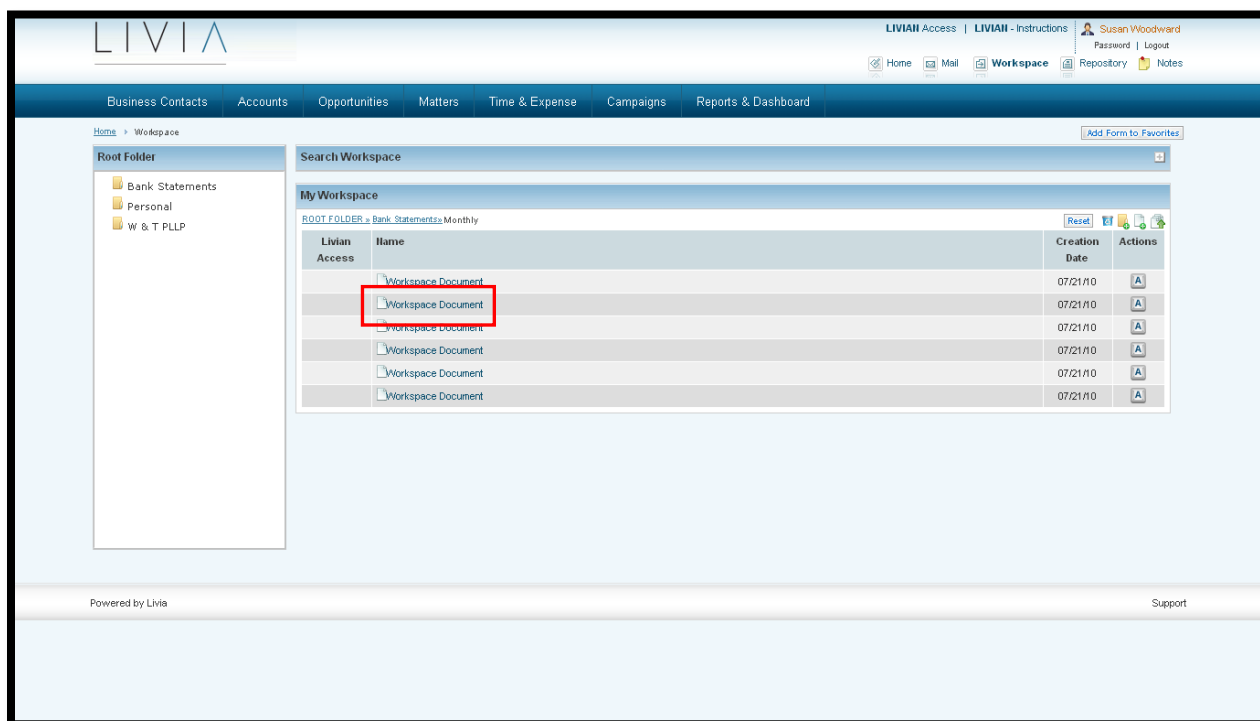
- Yes Multiple Upload of files is available.
- Click on “Workspace”
- Under My Workspace Click on Option “Mass Upload File”
- Select the required files
- Upload

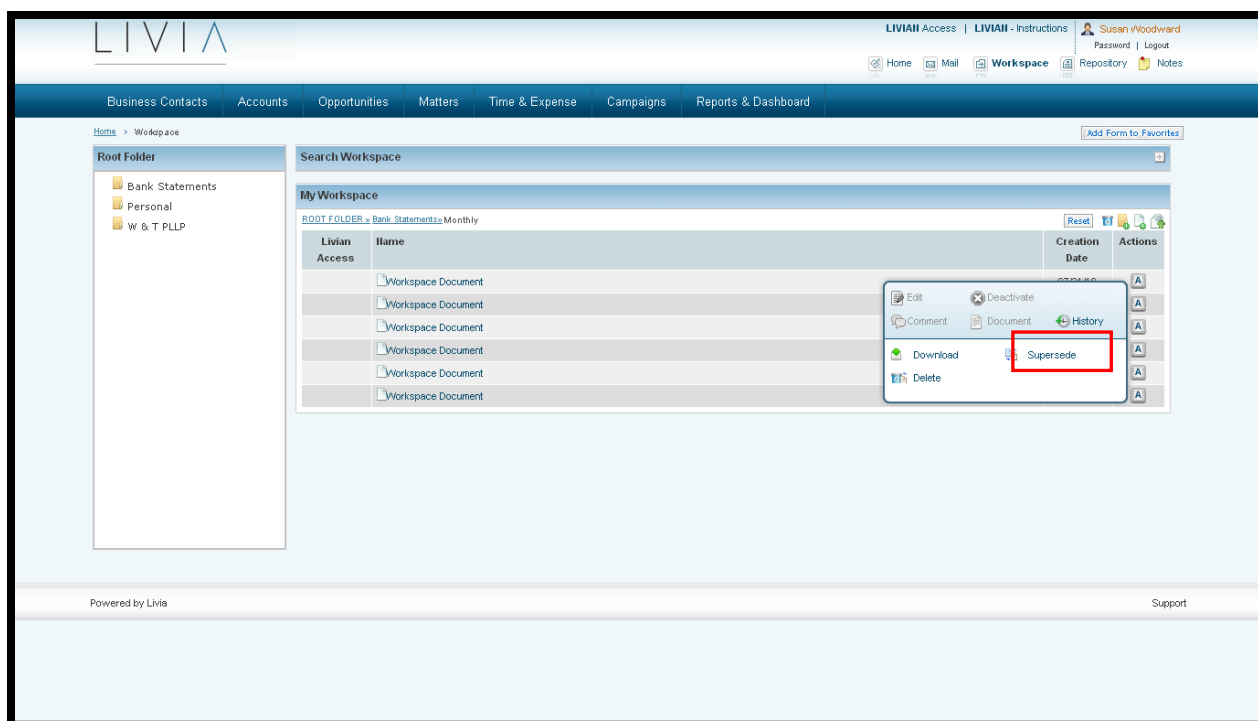
Q6: How can I get back to the Root Folder from the different folders?

- Click on “Workspace”
- Under My Workspace Click on Option “Reset”

Q7: How can I Download a document that I have already saved under Workspace?

- Select the Folder where the document is stored
- Select the Sub Folder if any
- Click on the Link of the document or Click on download under Action Tabs.





Q8: How do I supersede a document?

- Select the document that you want to Supersede
- Under Action Tab, Click on Supersede
- Select the Document that you want to supersede
- Supersede

Q9: How do I Delete a Document?

- Select the document that you want to delete
- Under Action Tab, Click on Delete
- It will give you a Pop-Up “Are you sure you want to send the file to Re-Cycle Bin?”
- Click OK

Q10: Where does the Files go when you to delete it?

- Files once deleted goes to the Re-Cycle Bin

Q11: Can I Re-Store the deleted document?

- Yes, you can Re-Store the deleted document

Q12: Can I view and download the Documents under Re-Cycle Bin?

- Yes, you can view and download the documents under Re-Cycle Bin

Q13: How do I view a document from the Re-Cycle bin?

- Click on “ Re-Cycle Bin”
- Under the Action Tab, Click on Open Document

Q14: How do I Re-Store a Document?

- Click on “ Re-Cycle Bin”
- Under the Action Tab, Click on Restore

The screenshot displays the LIVIA web application interface. At the top, there is a navigation bar with the LIVIA logo and user information: "LIVIA Access | LIVIA - Instructions | Dennis Gratton | Password | Logout". Below this is a secondary navigation bar with tabs: Home, Mail, Chat, **Workspace**, Repository, and Notes 3. A main navigation bar contains links: Business Contacts, Accounts, Opportunities, Matters, Time & Expense, Campaigns, and Reports & Dashboard.

The main content area is titled "Home > Workspace" and includes a "Search Workspace" bar. On the left, a "Root Folder" sidebar lists "List of Applications", "List of Matters", and "Reports". The central "My Workspace" section shows a table of reports under the heading "ROOT FOLDER > Reports".

Livian Access	Name	Creation Date	Actions
	Reports May 2010 [3]		
	Criminal_Law.docx		[Edit] [Deactivate] [Comment] [Document] [History] [Download] [Delete] [Supercede]
	Court2Court.docx		[A]
	Consumer_Law.docx		[A]
	Car_and_Automobile_Accidents_in_the_US.docx		[A]
	Bankruptcy.docx		[A]

A context menu is open over the first report row, showing options: Edit, Deactivate, Comment, Document, History, Download, Delete, and Supercede. Two red boxes highlight the menu icons at the top right and the menu options at the bottom right.

At the bottom of the interface, it says "Powered by Livia" on the left and "Support" on the right.

S