LIVIA PORTAL FAQ

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

Table of Content

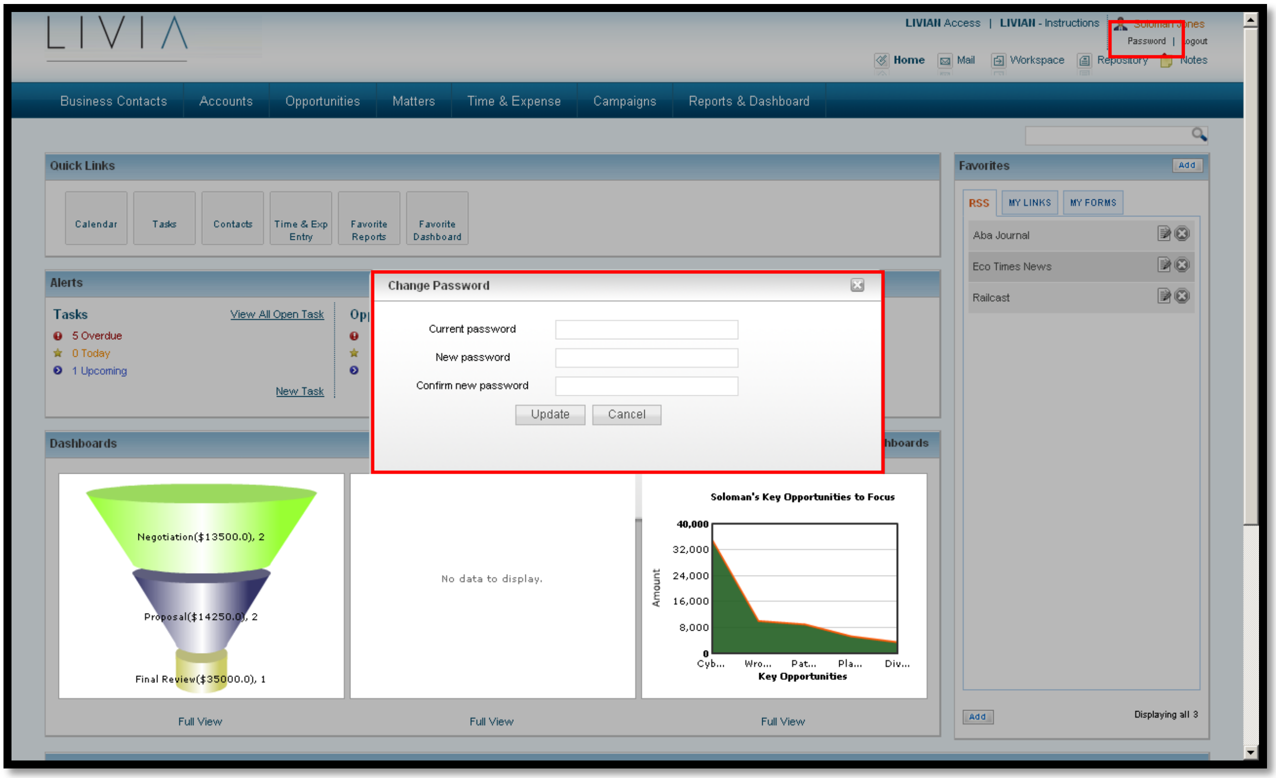
FAQ – GENERIC (Home Page)

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?

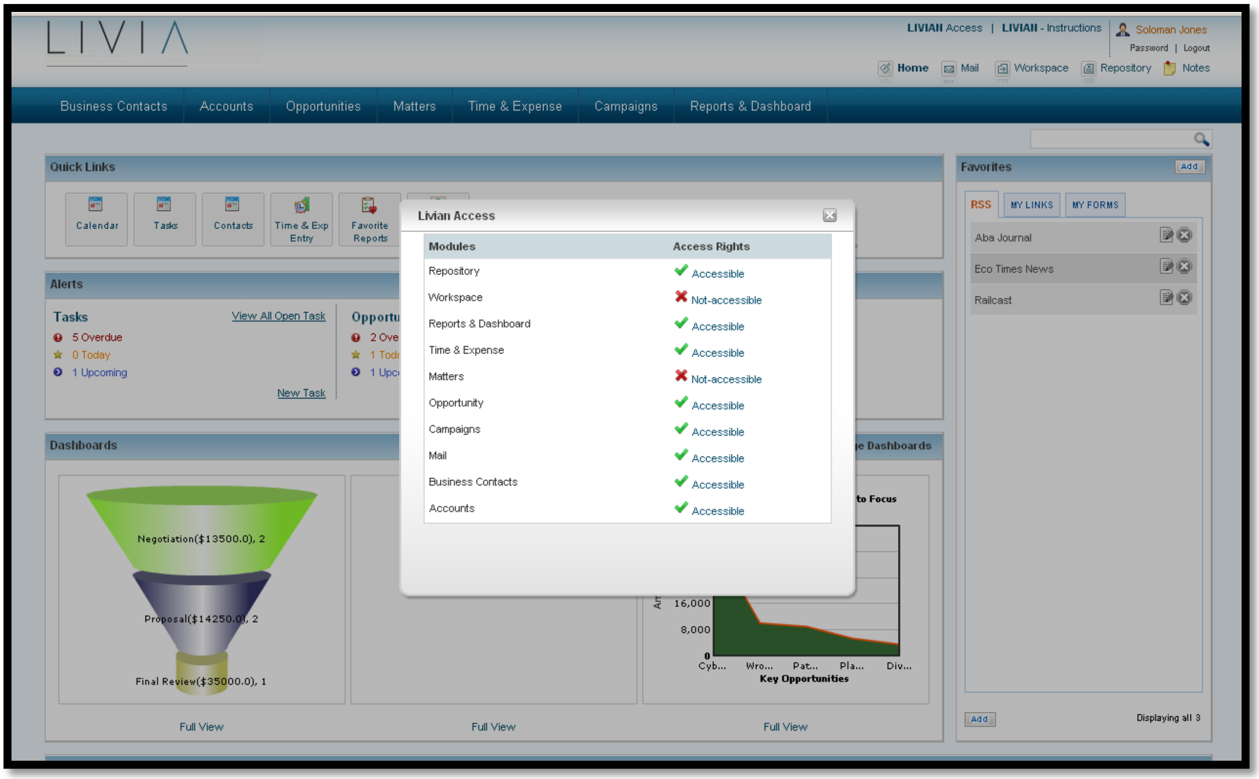
- Click on the password link on the Home Page on your extreme top right hand side
- Enter the Current password, new password and confirm the password.
- Click on Update to change the password. Click on cancel if don't want to change the password.

Q4: How do I Log out?

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

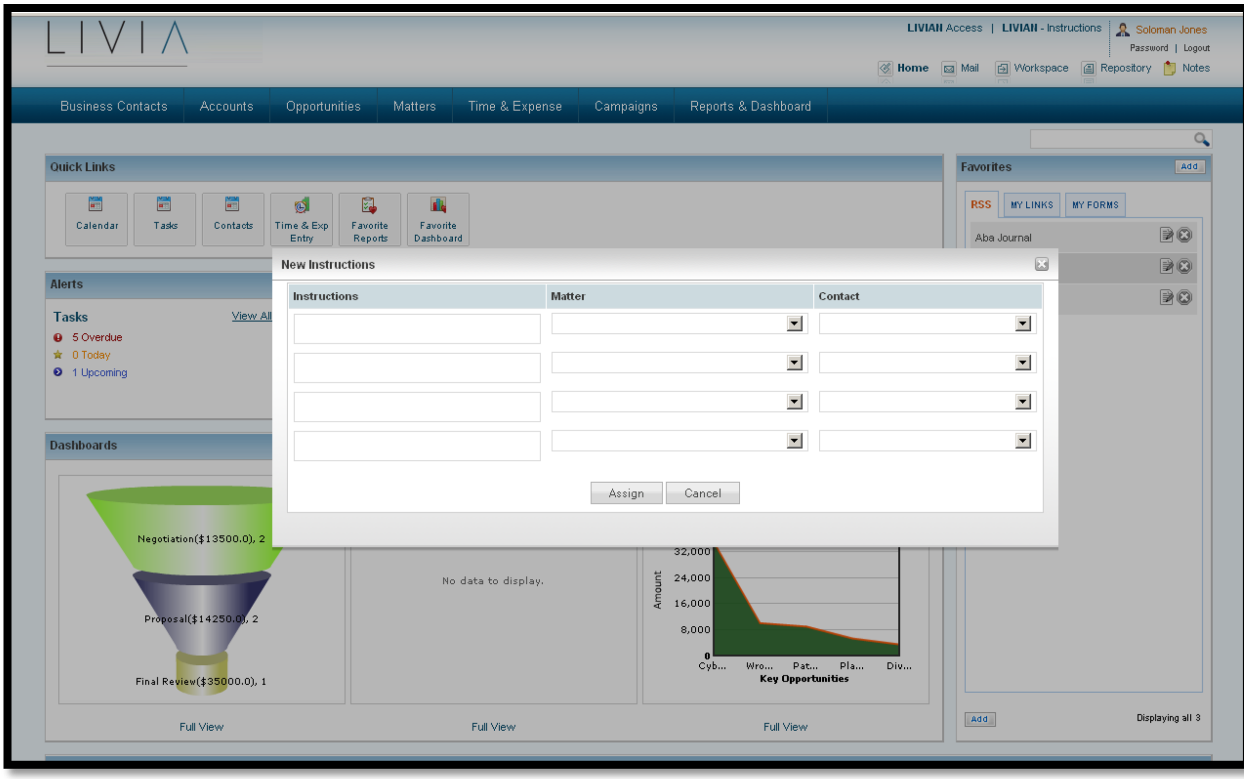
Q5: How can I give Access to the LIVIAN?

- 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



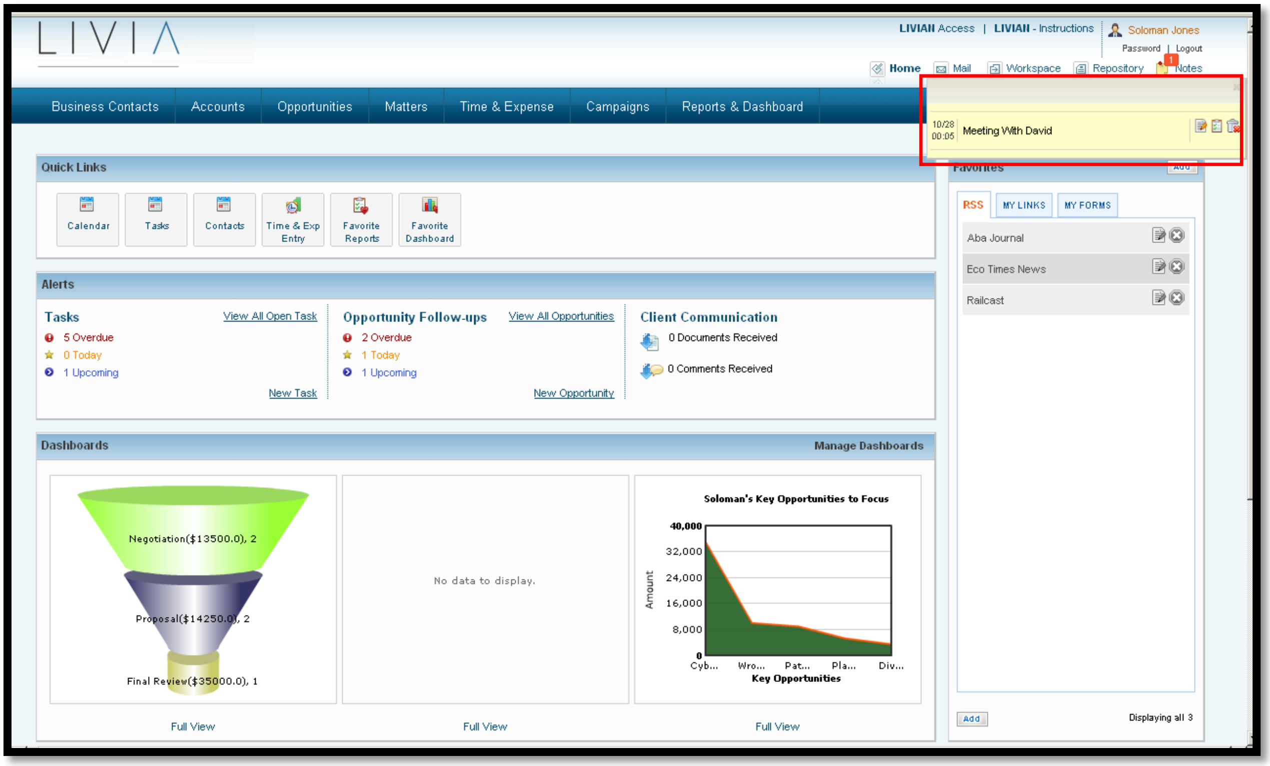
Q6: How do I give Instructions to the Livian?

- 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)



Q7: How do I Add Notes?

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



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).
- Checks 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.
- Checks 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 Tine 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)

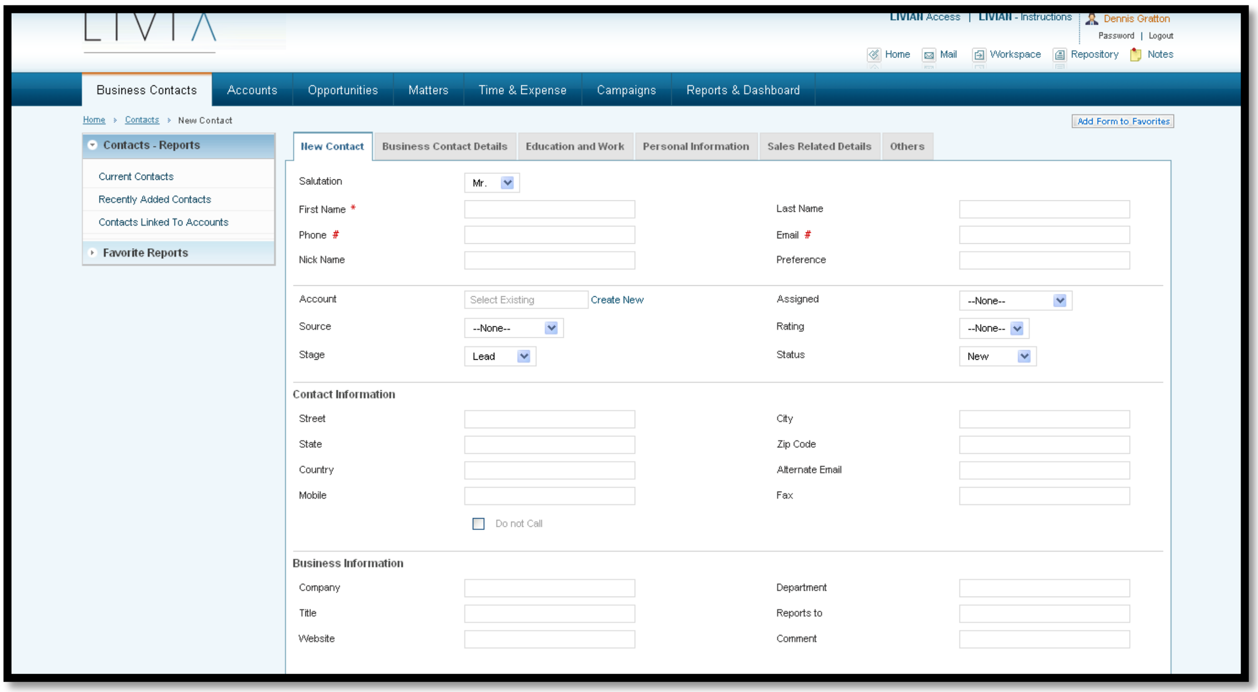
Q10. How do I delete a Note?

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

FAQ-CONTACT

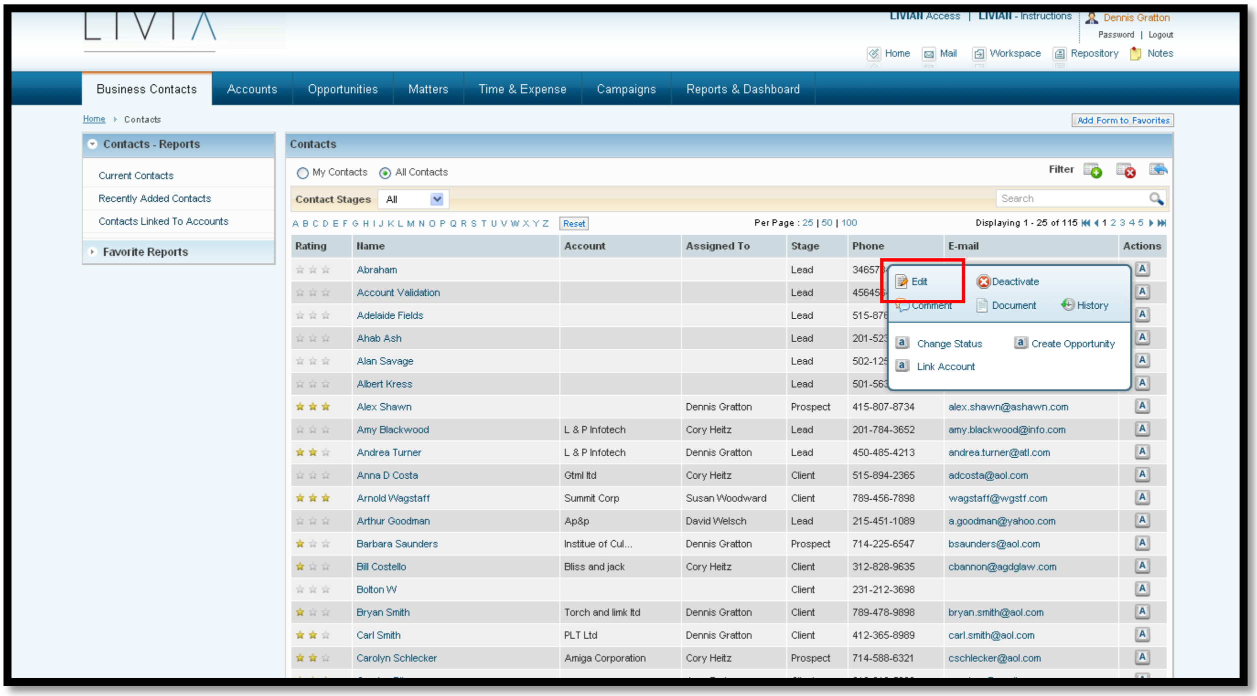
Q1: How do I create a contact?

- 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



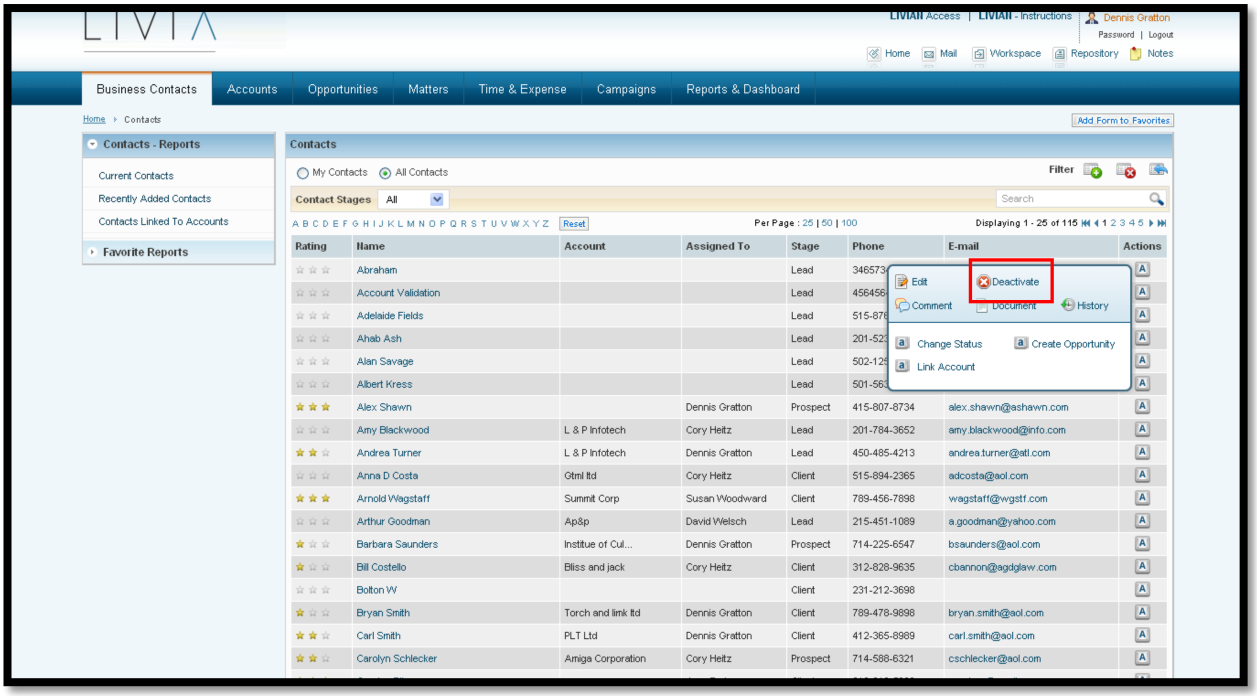
Q2: How do I edit a contact?

- ➢ 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



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?

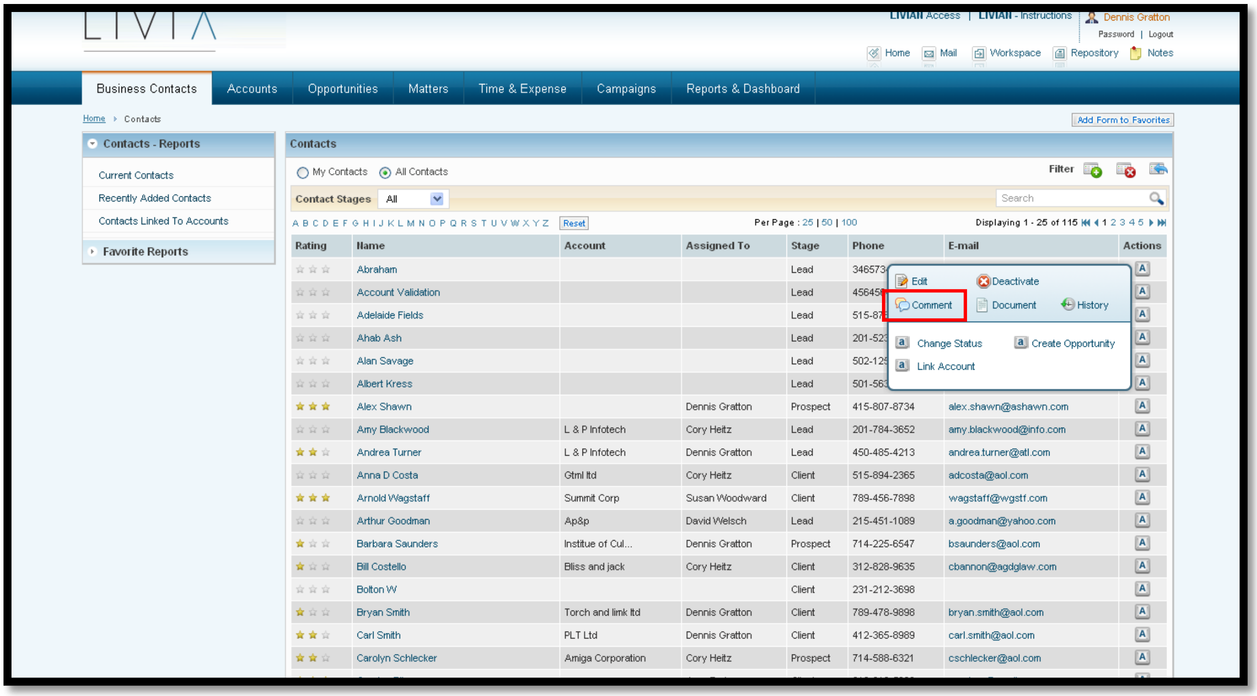
- ➢ A deactivated Contact can be re-activated

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?

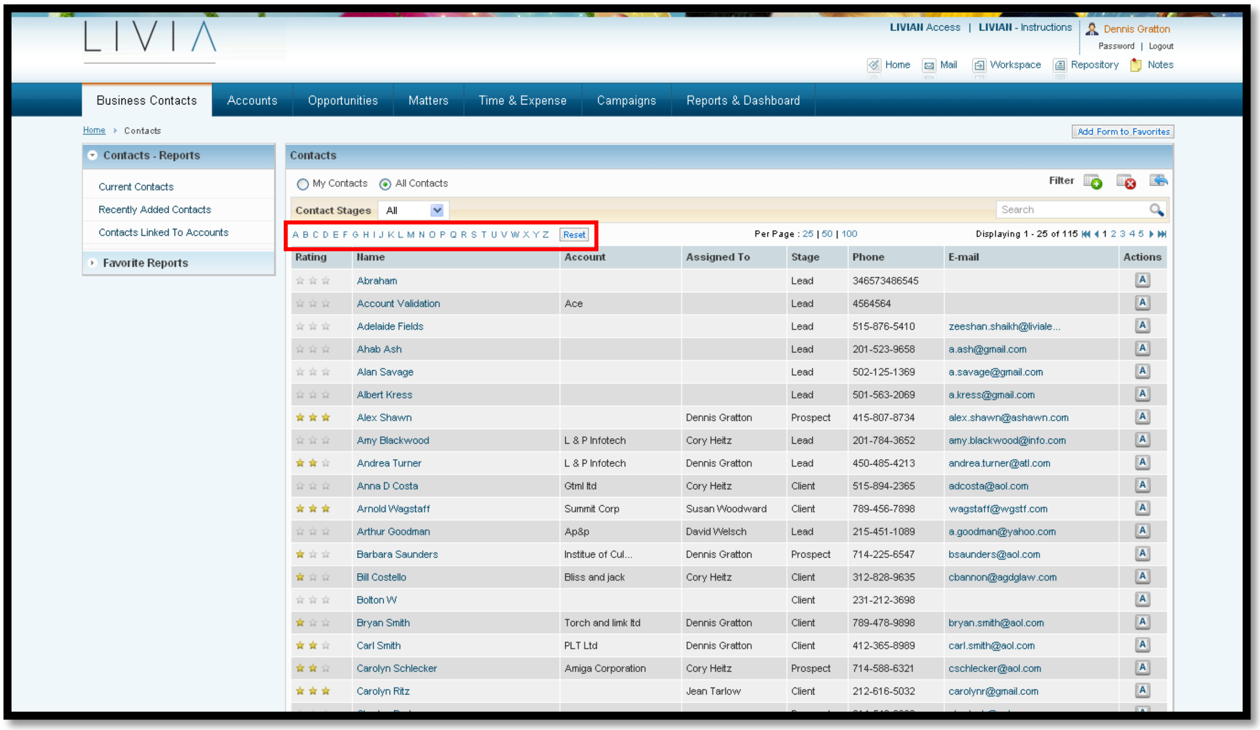
- ➢ Scroll on the Action Pad and click on Link Account
- ➢ Select from an Existing Account or Create a New Account
- ➢ Click on Save

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

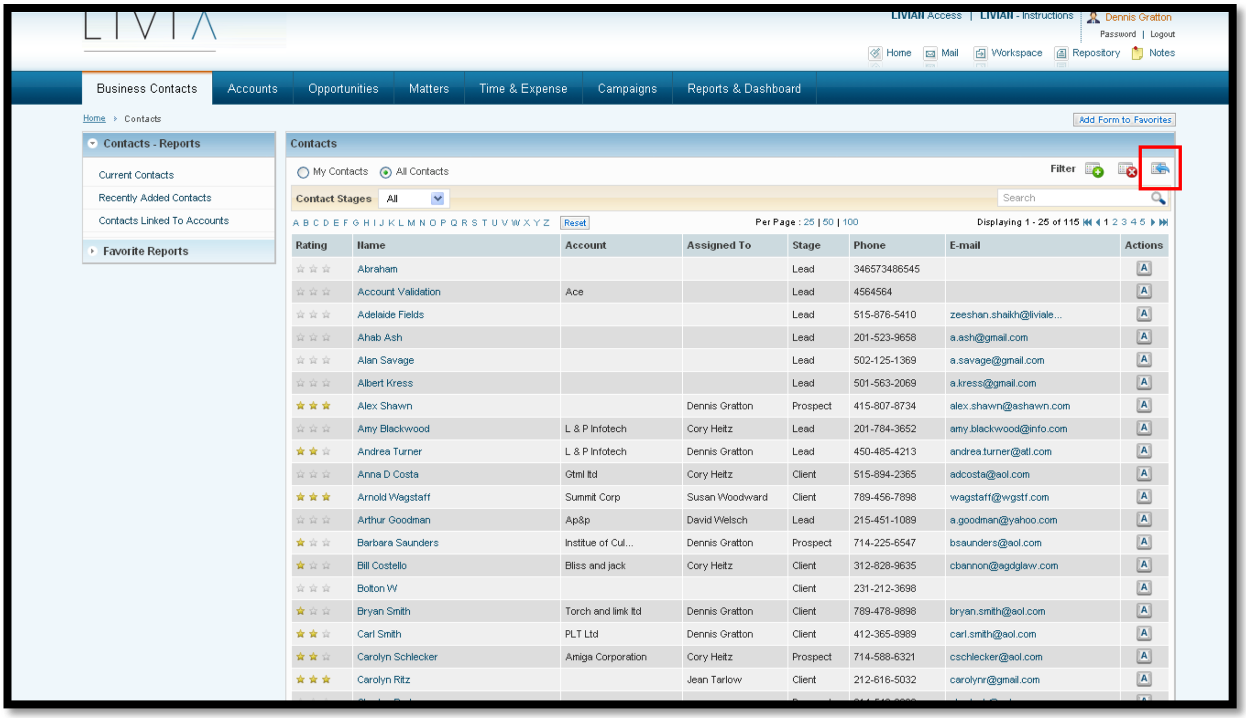
Q13: How to sort as per alphabets?

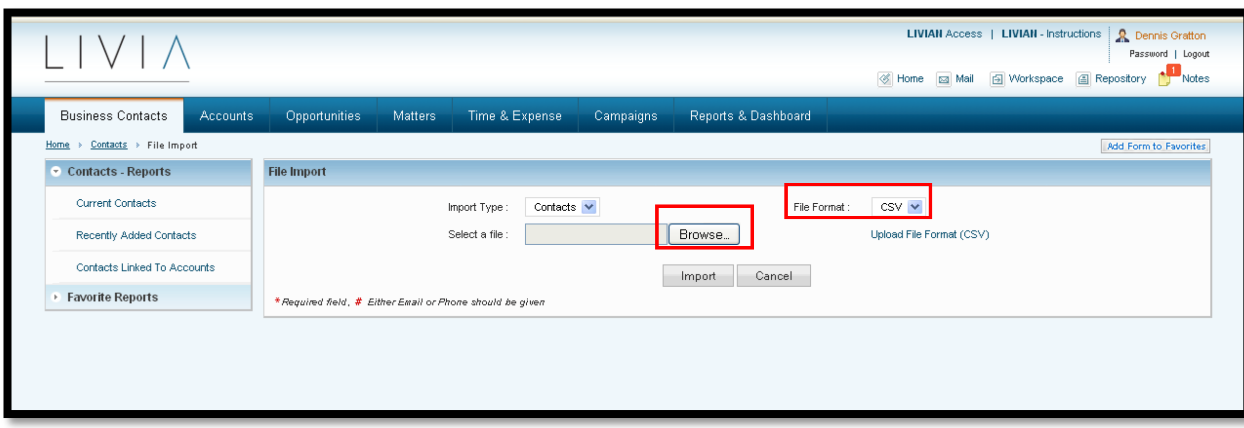
- By clicking on the letters within the Business Contact Home Page the Contacts are listed as per the letter selected



Q 14: How do I Import Contacts?

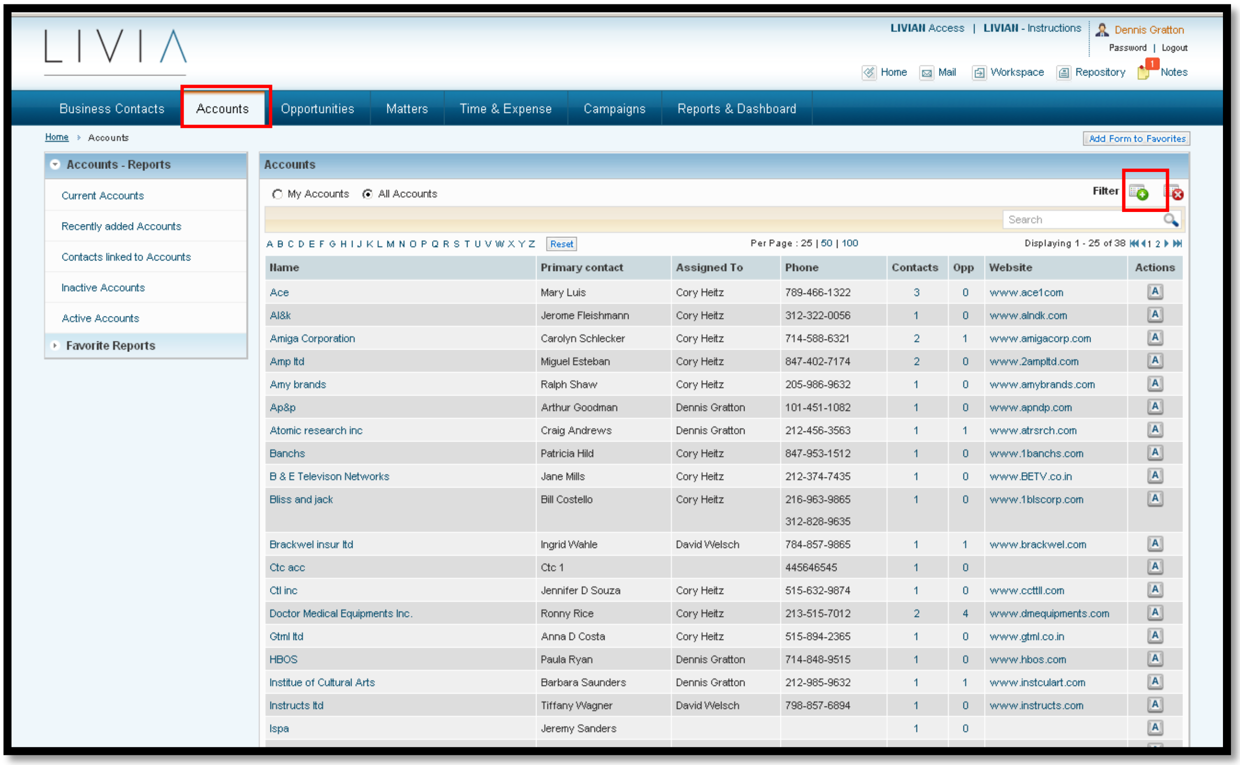
- Click on the import icon located at the top right of the contacts home page
- Browse for the file that needs to be imported
- If required select the file format from the drop down list


LIVIA
LIVIAII Access | LIVIAII - Instructions | Dennis Gratton
Password | Logout
Home Mail Workspace Repository Notes
Business Contacts Accounts Opportunities Matters Time & Expense Campaigns Reports & Dashboard
Home > Contacts
Add Form to Favorites
Contacts - Reports
Current Contacts
Recently Added Contacts
Contacts Linked To Accounts
Favorite Reports
Contacts
My Contacts All Contacts
Filter
Contact Stages All
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
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.shaikh@liviale...
Ahab Ash Lead 201-523-9658 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 Heitz Lead 201-784-3652 amy.blackwood@info.com
Andrea Turner L & P Infotech Dennis Gratton Lead 450-485-4213 andrea.turner@atl.com
Anna D Costa Gtml ltd Cory Heitz Client 515-894-2365 adcosta@aol.com
Arnold Wagstaff Summit Corp Susan Woodward Client 789-456-7898 wagstaff@wgstf.com
Arthur Goodman Ap&p David Welsch Lead 215-451-1089 a.goodman@yahoo.com
Barbara Saunders Institue of Cul... Dennis Gratton Prospect 714-225-6547 bsaunders@aol.com
Bill Costello Bliss and jack Cory Heitz Client 312-828-9635 cbannon@agdglaw.com
Bolton W Client 231-212-3698
Bryan Smith Torch and limk ltd Dennis Gratton Client 789-478-9898 bryan.smith@aol.com
Carl Smith PLT Ltd Dennis Gratton Client 412-365-8989 carl.smith@aol.com
Carolyn Schlecker Amiga Corporation Cory Heitz Prospect 714-588-6321 cschlecker@aol.com
Carolyn Ritz Jean Tarlow Client 212-616-5032 carolynr@gmail.com


LIVIA
LIVIAII Access | LIVIAII - Instructions | Dennis Gratton
Password | Logout
Home Mail Workspace Repository Notes
Business Contacts Accounts Opportunities Matters Time & Expense Campaigns Reports & Dashboard
Home > Contacts > File Import
Add Form to Favorites
Contacts - Reports
Current Contacts
Recently Added Contacts
Contacts Linked To Accounts
Favorite Reports
File Import
Import Type : Contacts
Select a file : Browse...
File Format : CSV
Upload File Format (CSV)
Import Cancel
* Required field, # Either Email or Phone should be given

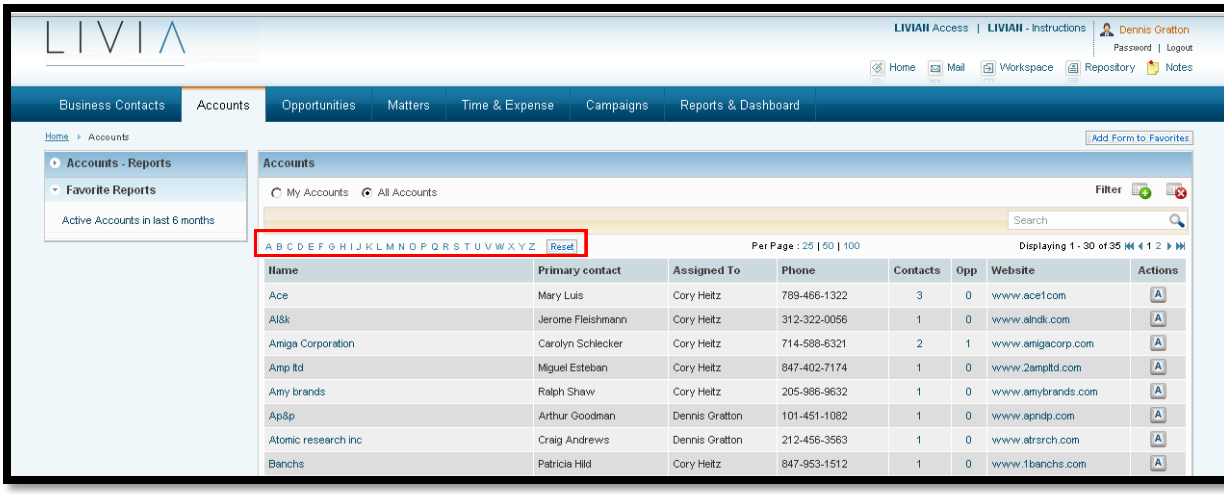
FAQ - ACCOUNTS

1. 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



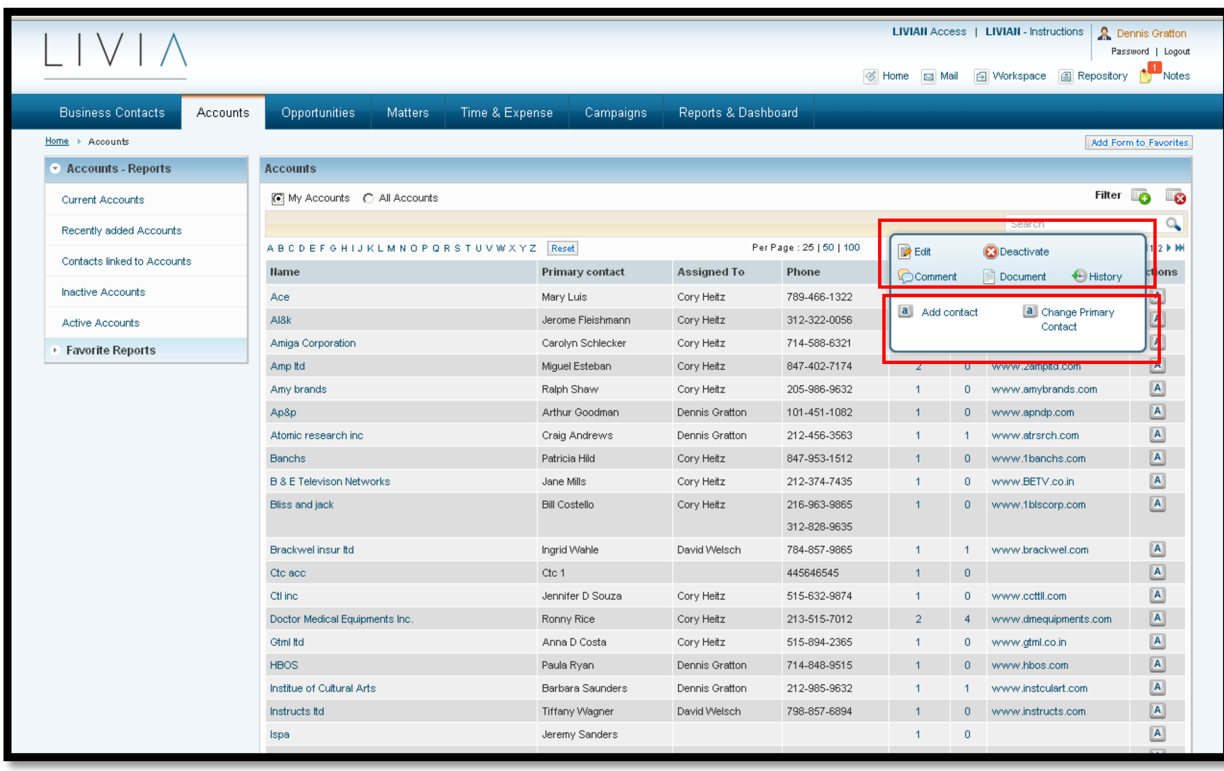
2. How do I add a contact while creating an account?
   - While creating an account, a new or an existing contact can be associated to an account.
   - To create a new contact click on “create new”
   - To select an existing contact enter the first 3 initials of the name of the contact

3. 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



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



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

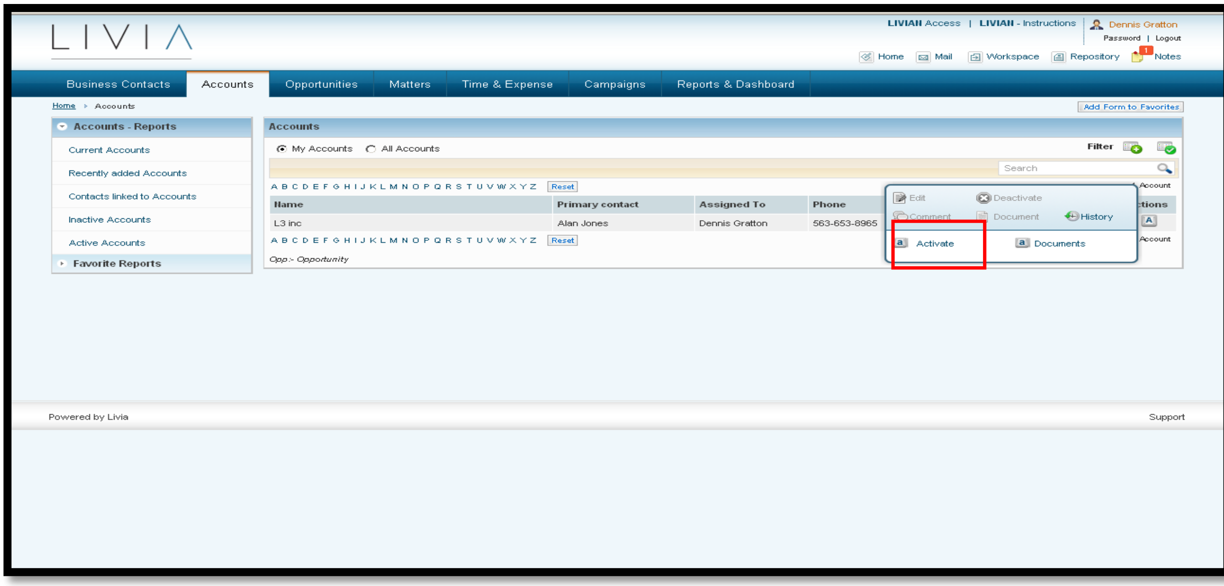
9. How do I comment on an account?
   - Click “the action icon” located at the extreme right of the account homepage.
   - Then click on “comment” from the action pad
   - On the modal window enter the comment
   - Comment once entered will be displayed below of the comment modal window

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

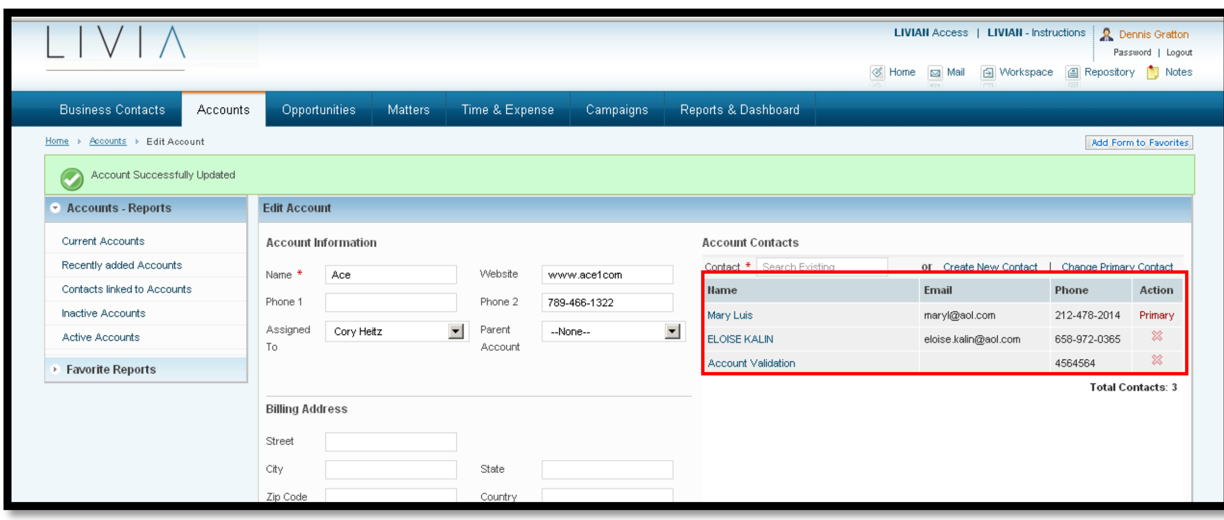
11. What information will the history tab provide?
    - The history tab is provide information like the creation of the account
    - Comments posted
    - If the account is deactivated

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

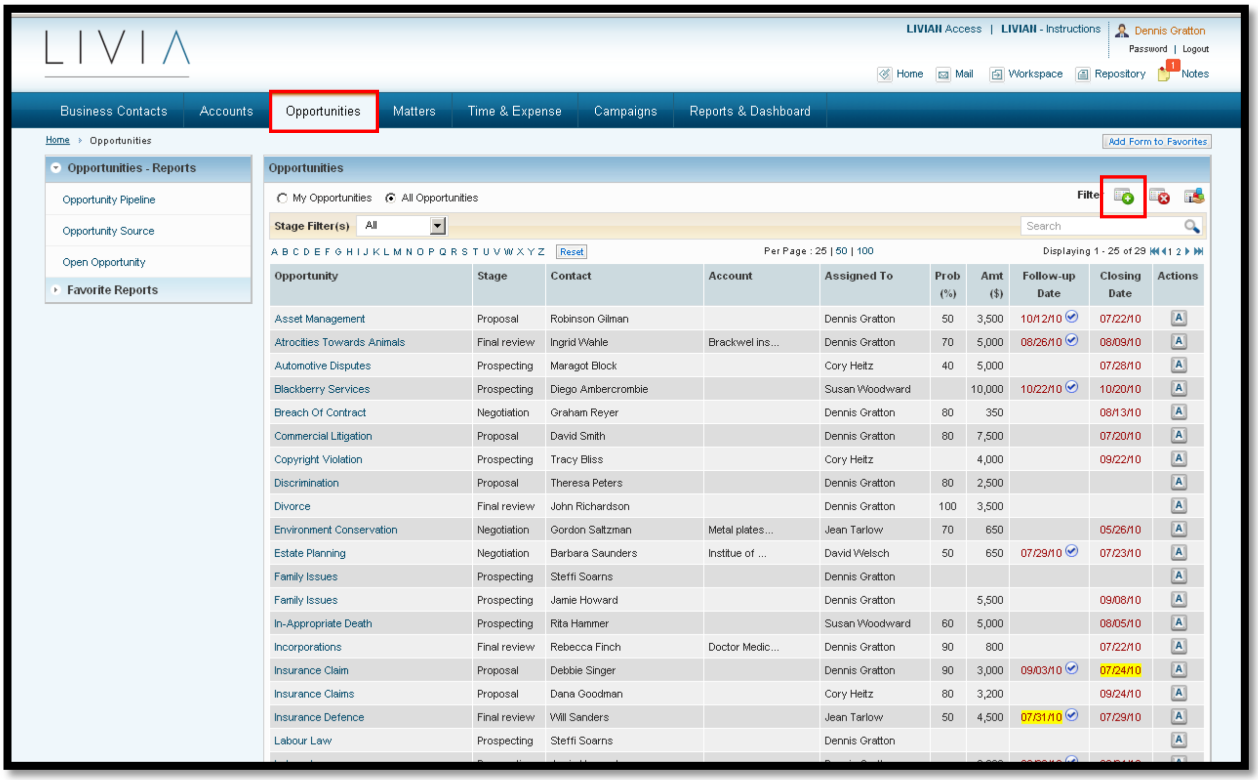


14. How do I delete a contact from an account?
   - ➢ Select the “account” from which the contact needs to be deleted
   - ➢ Under “account contacts” the list of contacts for that account is visible
   - ➢ Click the “cross sign” under action

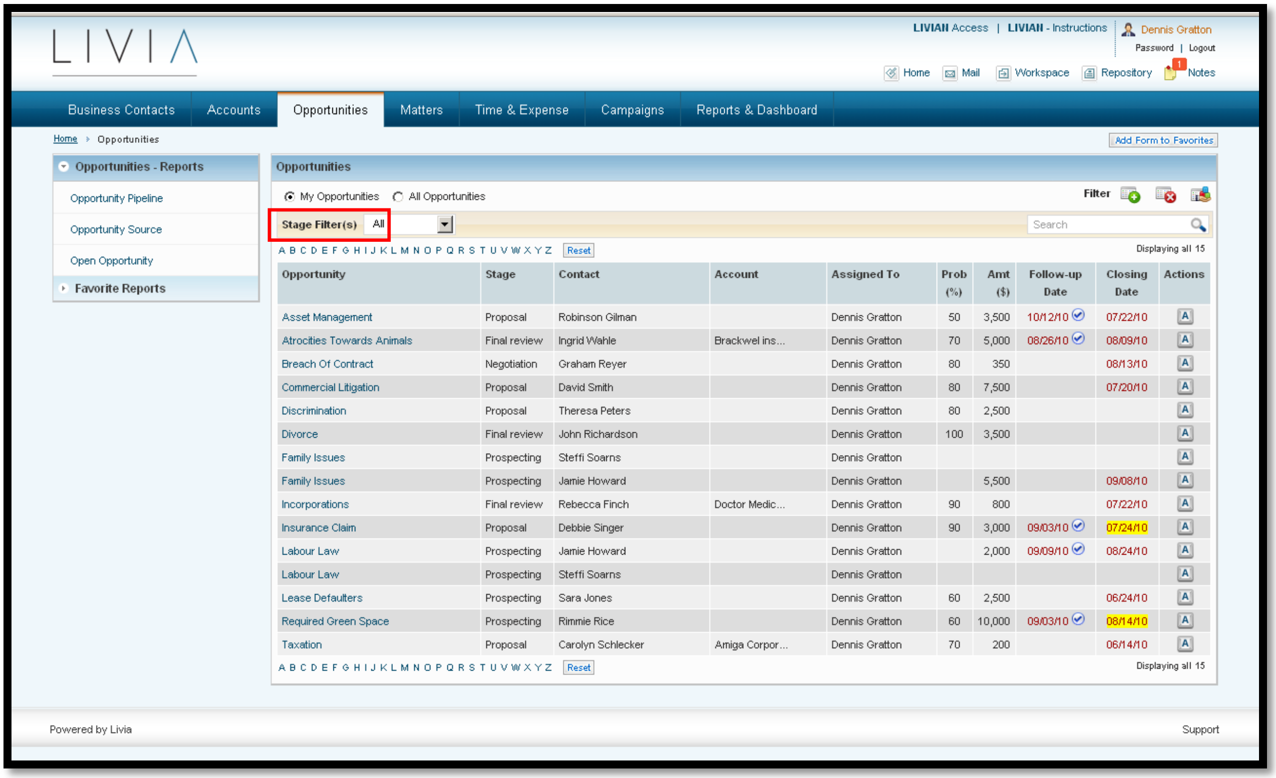


FAQ - OPPORTUNITY

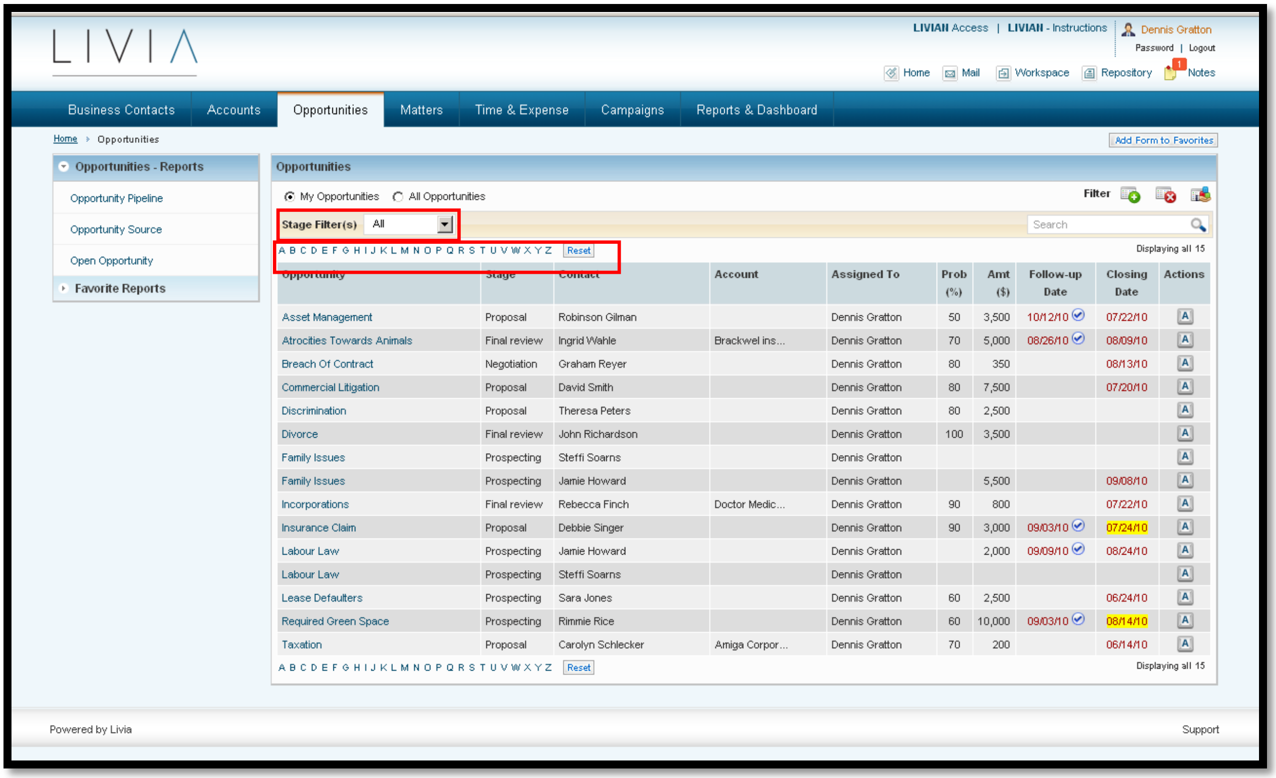
1. How to create an Opportunity?
   - ➢ Log on to the portal
   - ➢ Click on the “Opportunities”
   - ➢ Click on “create new opportunity icon with a green circle” which appears on the opportunity home page
   - ➢ Enter the required information



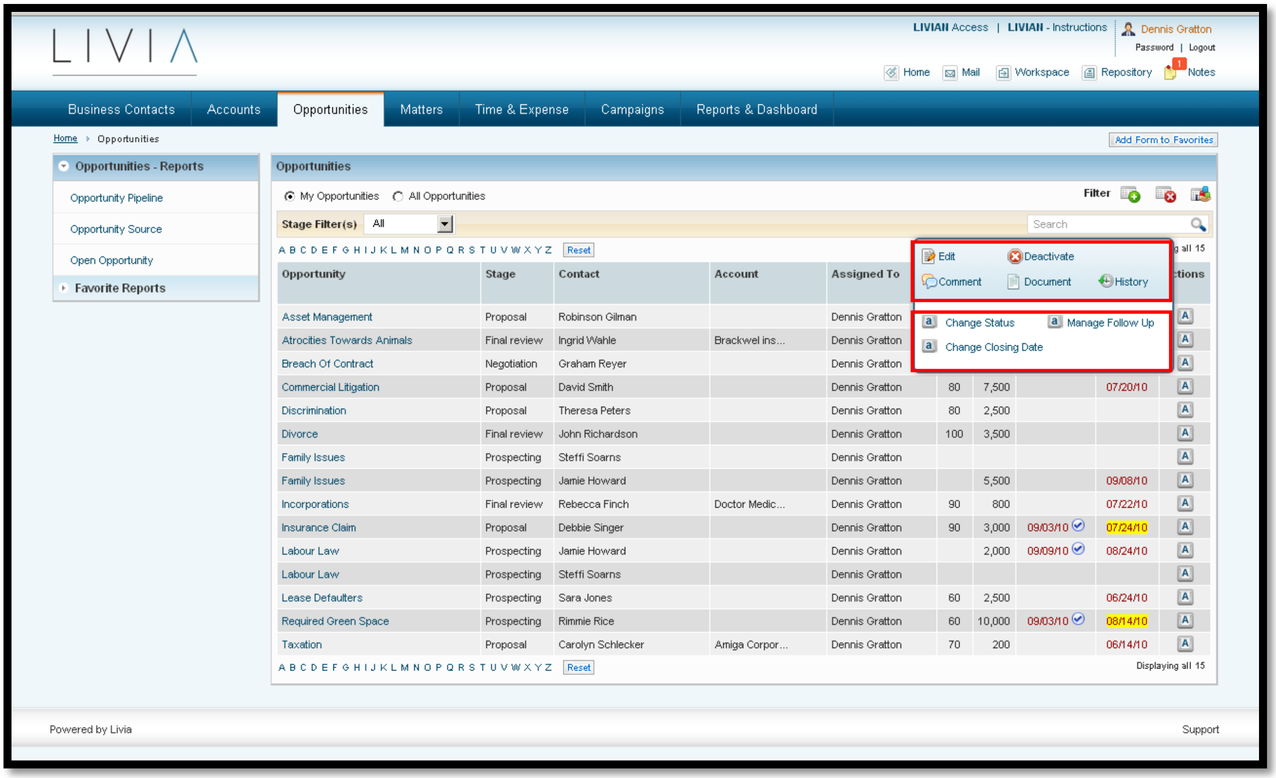
2. How do I access the opportunities assigned to me?
   - ➢ “All opportunities” will list the opportunities that is visible to all the users within the law-firm
   - ➢ “My opportunities” will list the opportunities assigned to you



3. How do I filter my Opportunities?
   - ➢ Opportunities can be filtered according to the “Stages”
   - ➢ It can also be sorted as per the letters


LIVIA
LIVIAN Access | LIVIAN - 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
Filter
Stage Filter(s) All
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
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
Atrocities Towards Animals | Final review | Ingrid Wahle | Brackwel ins... | Dennis Gratton | 70 | 5,000 | 08/26/10 | 08/09/10
Breach Of Contract | Negotiation | Graham Reyer | | Dennis Gratton | 80 | 350 | | 08/13/10
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 | 09/09/10 | 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 | | 06/14/10
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 15
Powered by Livia
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



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 and 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

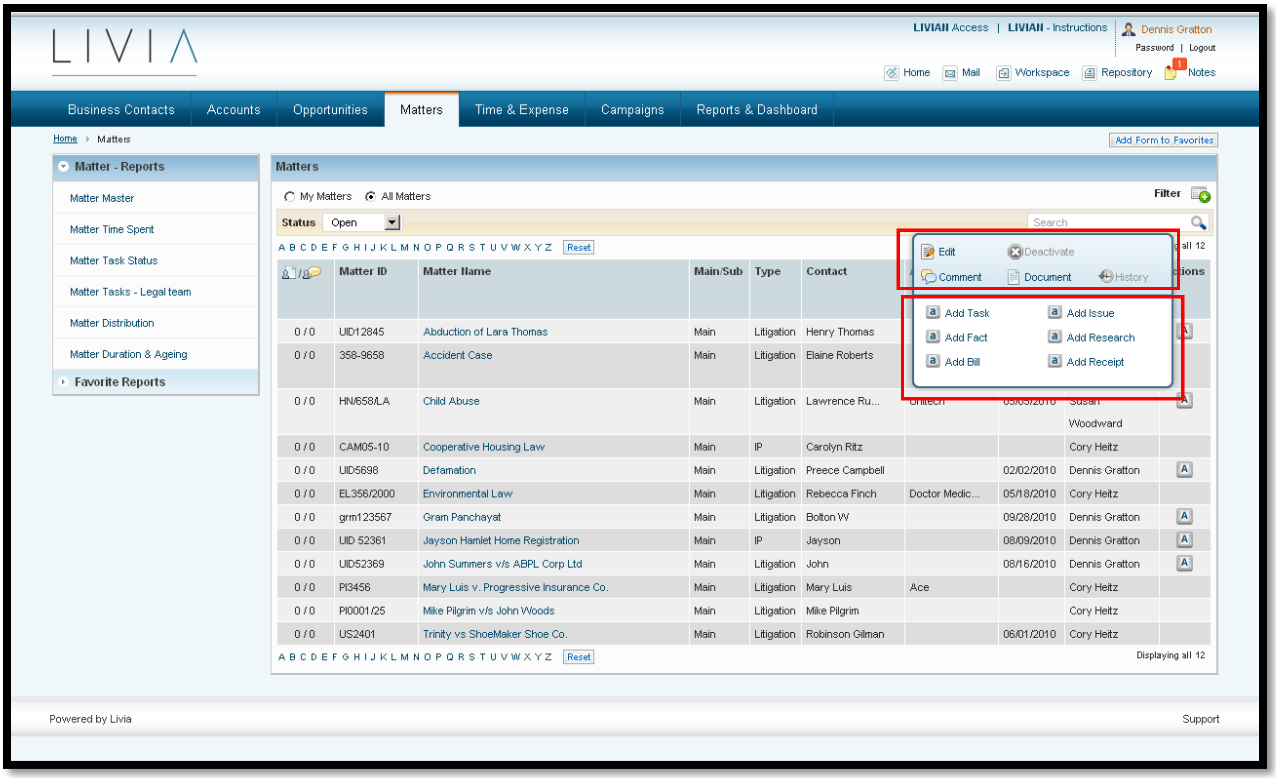
2. How can I search for a matter?
   - You can enter the entire name of the matter or the first three letters of the matter in the "search field"
   - You can search as per alphabet
   - You can search by contact
   - You can search by filter

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"



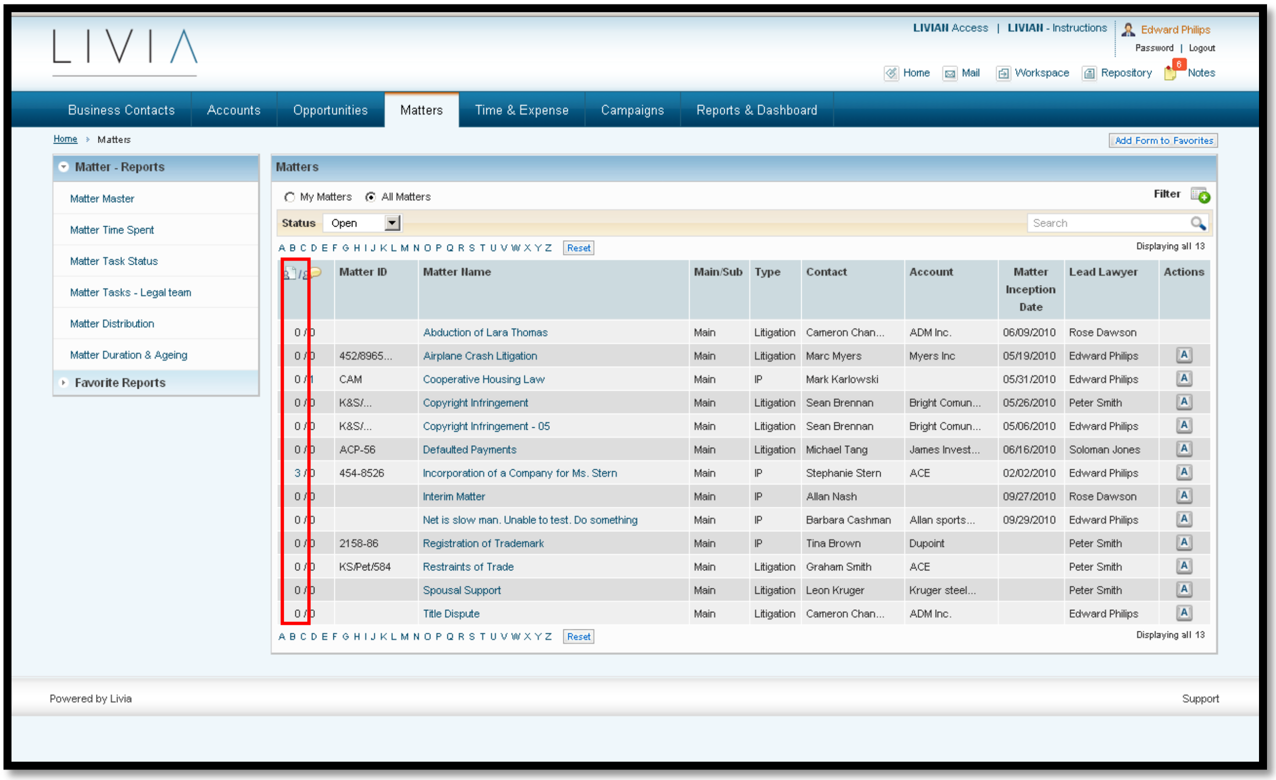
7. How do I comment on a matter?
   - ➢ Click on “the action icon” located at the extreme right of the matter homepage
   - ➢ Then click on “Comment” from the action pad

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

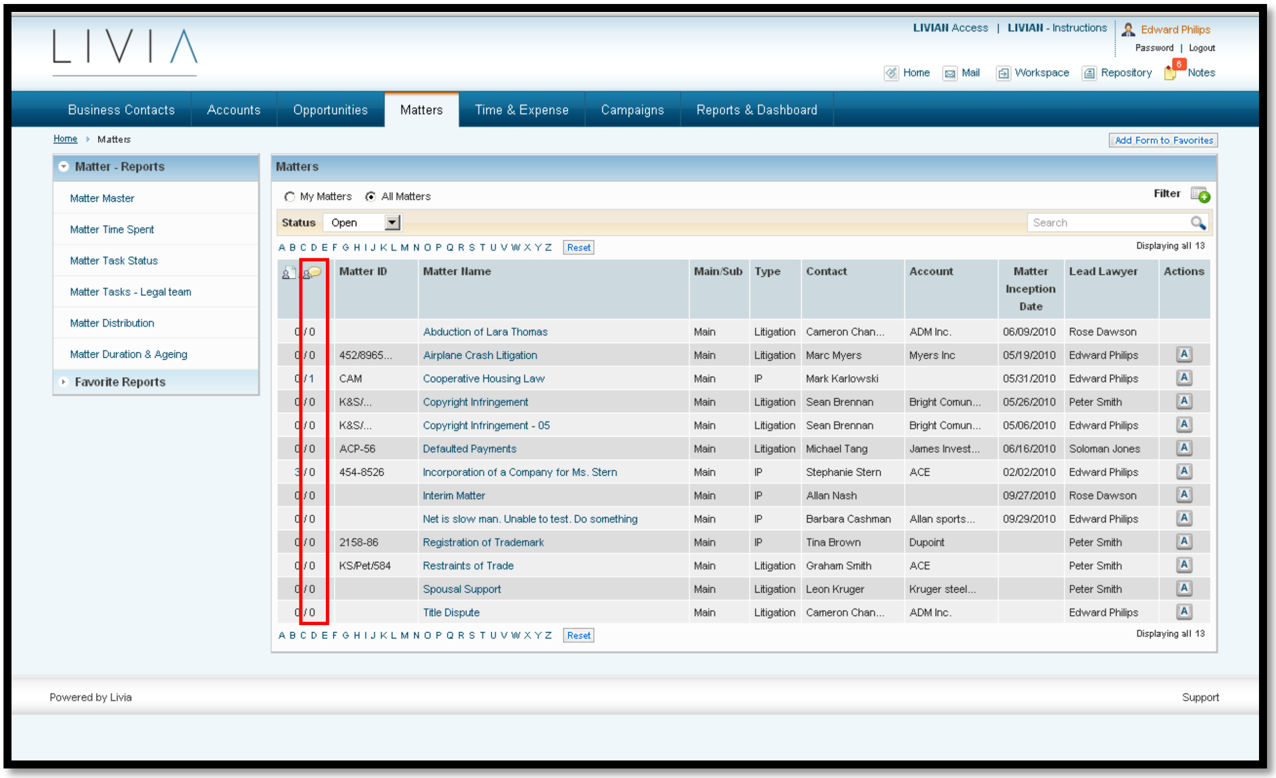
9. How do I add a new document?
   - ➢ Click on “the action icon” located at the extreme right of the matter homepage
   - ➢ Then click on “Document” from the action pad
   - ➢ “Browse” for the document and fill in the required information
   - ➢ Then click on “upload”

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



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”

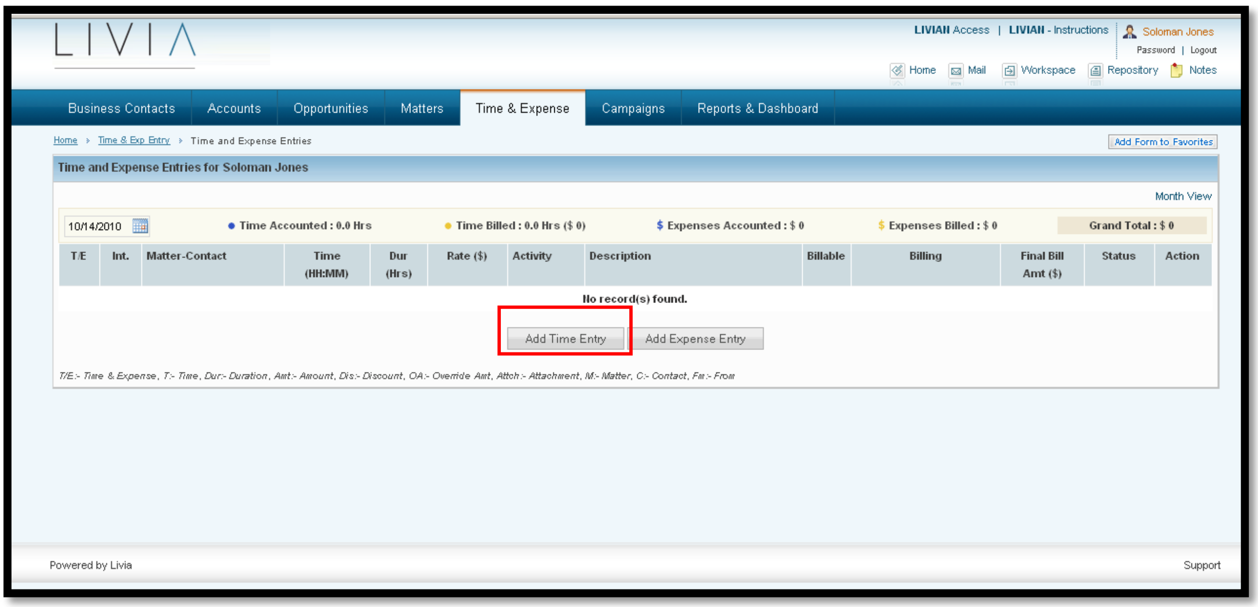
42. Can I add bills to a matter, how do I do that?
    - You can add bill to a matter
    - You need select the “matter”
    - Click on “billing & retainer”
    - In the billing tab click on “Add” which is at the extreme right of the billing tab
    - Fill in the required information
    - Then click on “save”

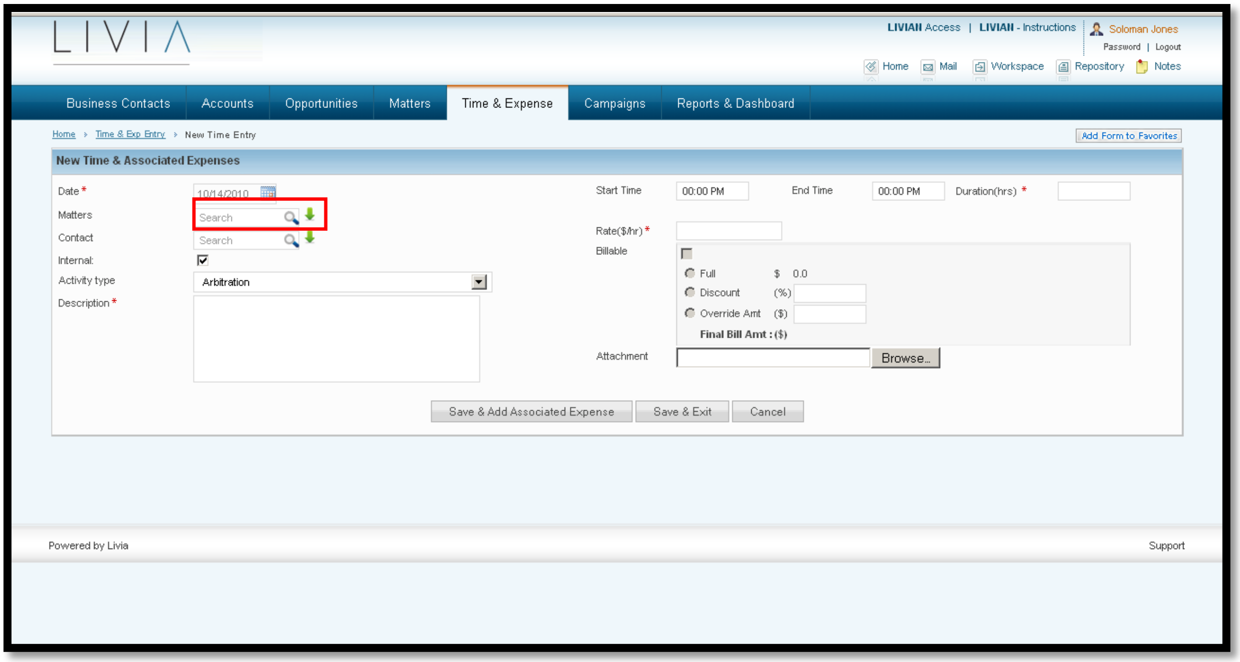
43. Can I add receipts to the matter billing?
    - You can add receipts to a matter
    - You need select the “matter”
    - Click on “billing & retainer”
    - In the retainer/ bill receipt tab click on “Add” retainer receipt which is at the extreme right of the retainer/ bill receipt tab
    - Fill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

FAQ – TIME & EXPENSE

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

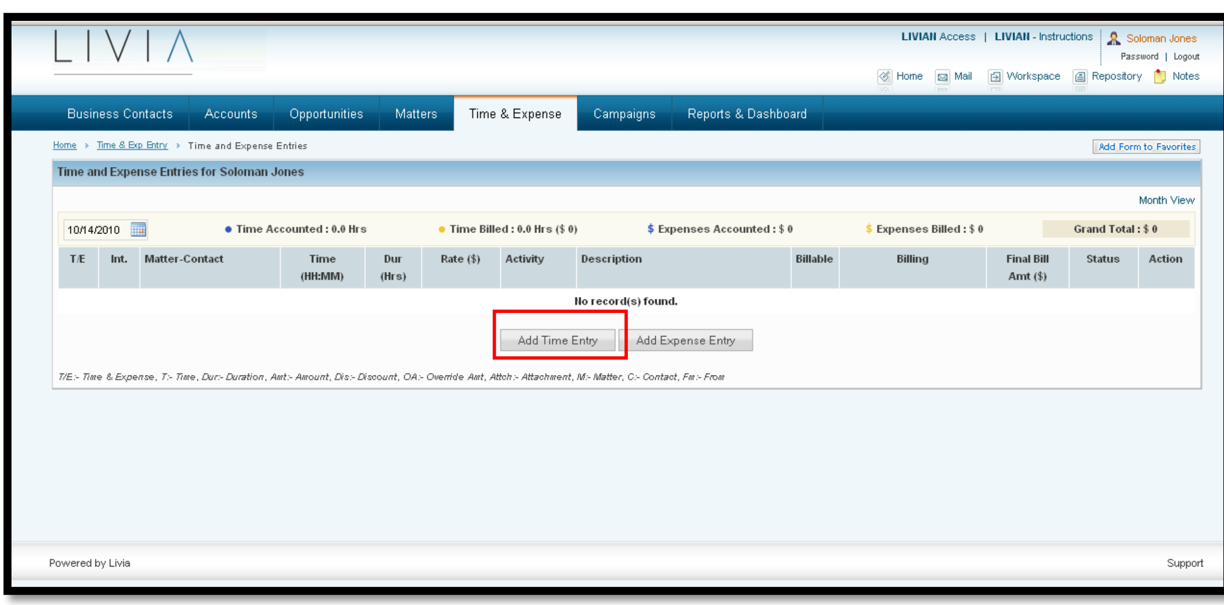
- Click on the desired date in Calendar view.
- Click on Add Time Entry Button
- Search Matter/Select from dropdown it auto populates the associated contact.
- Upload the document if required
- Enter start time & end time, or duration.
- Select Activity Type.
- Enter the description.
- Override rate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

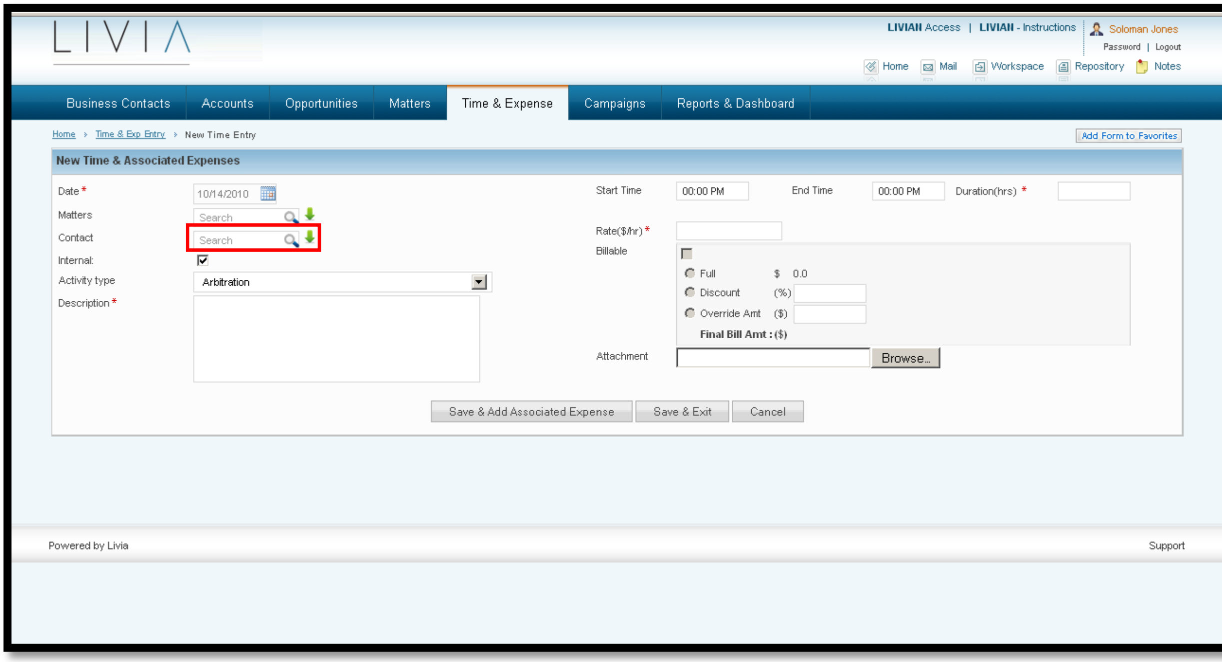




Q2: How do I add a New Time Entry selecting Contact?

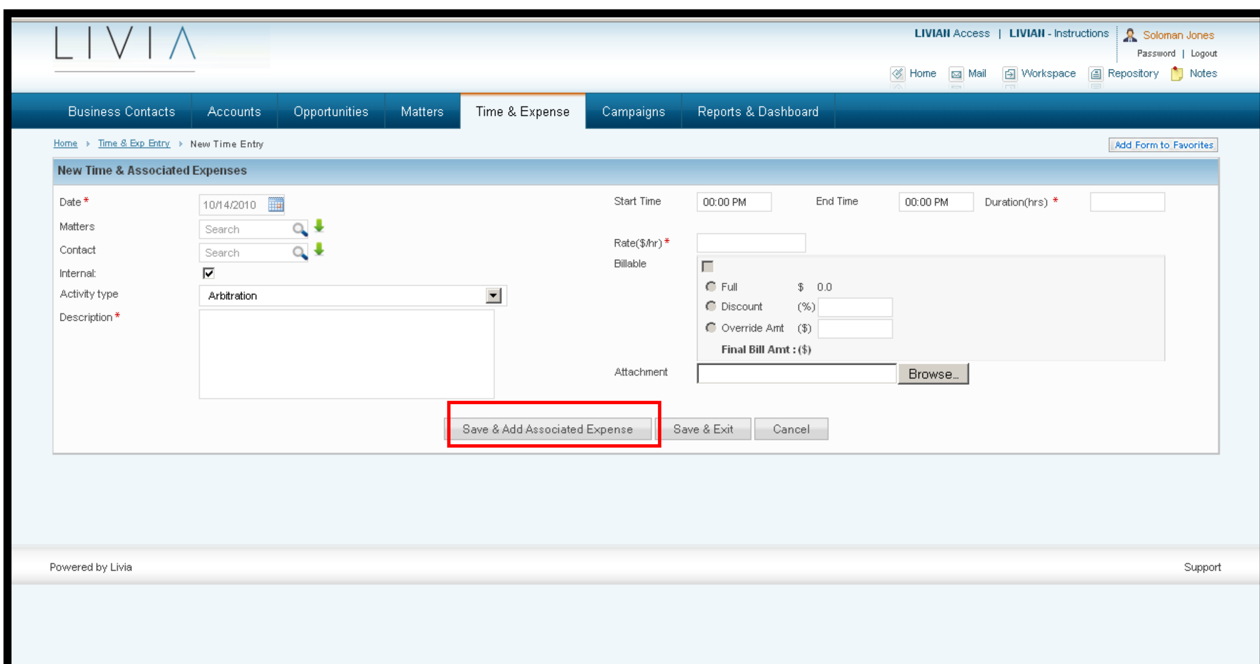
- ➢ Click on the desired date in Calendar view.
- ➢ Click on Add Time Entry Button
- ➢ Search Contact/ Select from dropdown.
- ➢ Upload the document if necessary.
- ➢ Enter start time & end time, or duration.
- ➢ Select Activity Type.
- ➢ Enter the description.
- ➢ Override rate is picked up from admin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

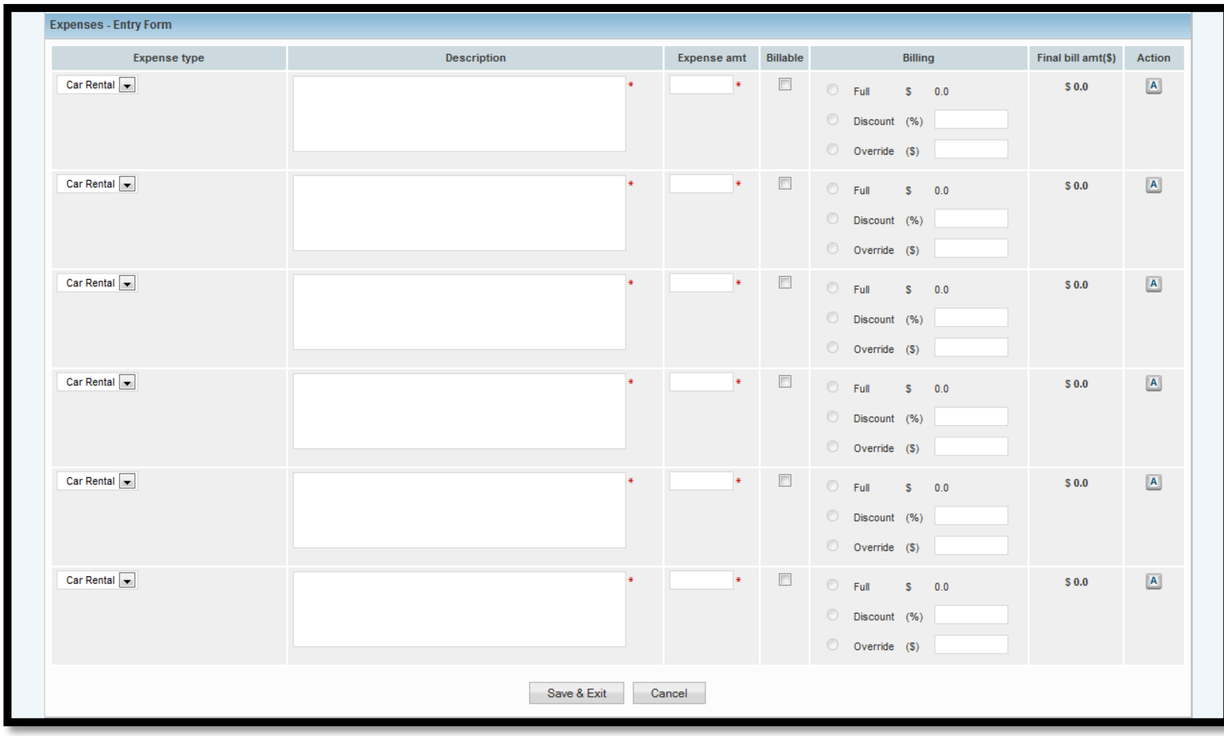




Q3: How do I Add and Save an Associated Expenses?

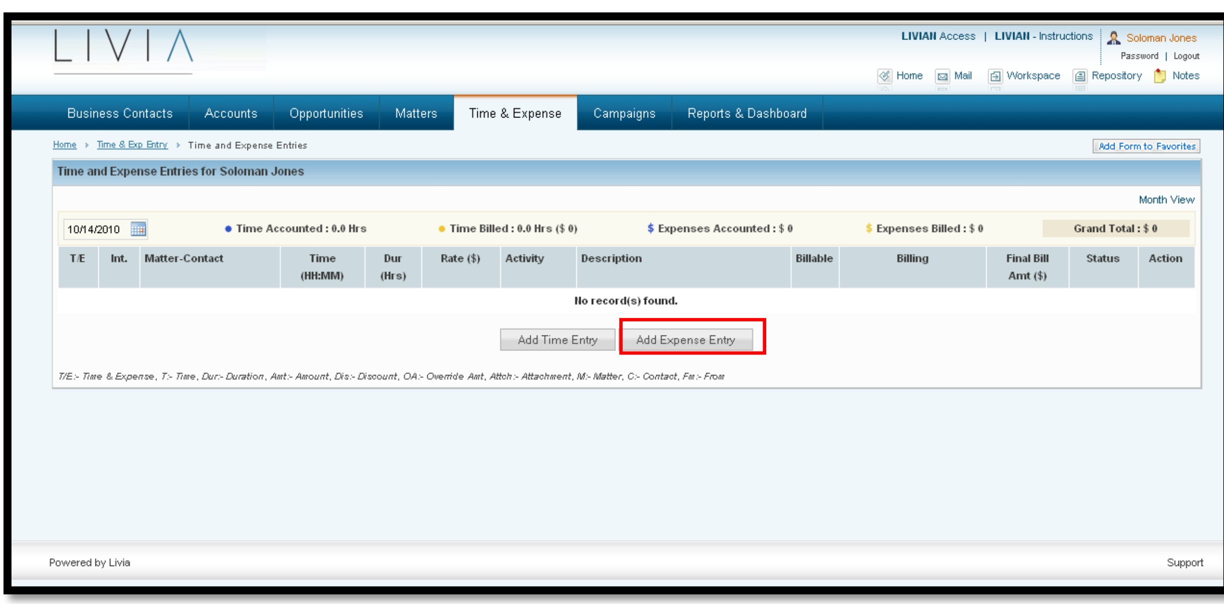
- After entering the time entry click on Add & Save Associated Expense.
- Select Expense Type from the dropdown.
- Enter the description.
- Enter the expense amount.
- Check the Billable Checkbox.
- Upload the document.
- Save & Exit or Cancel

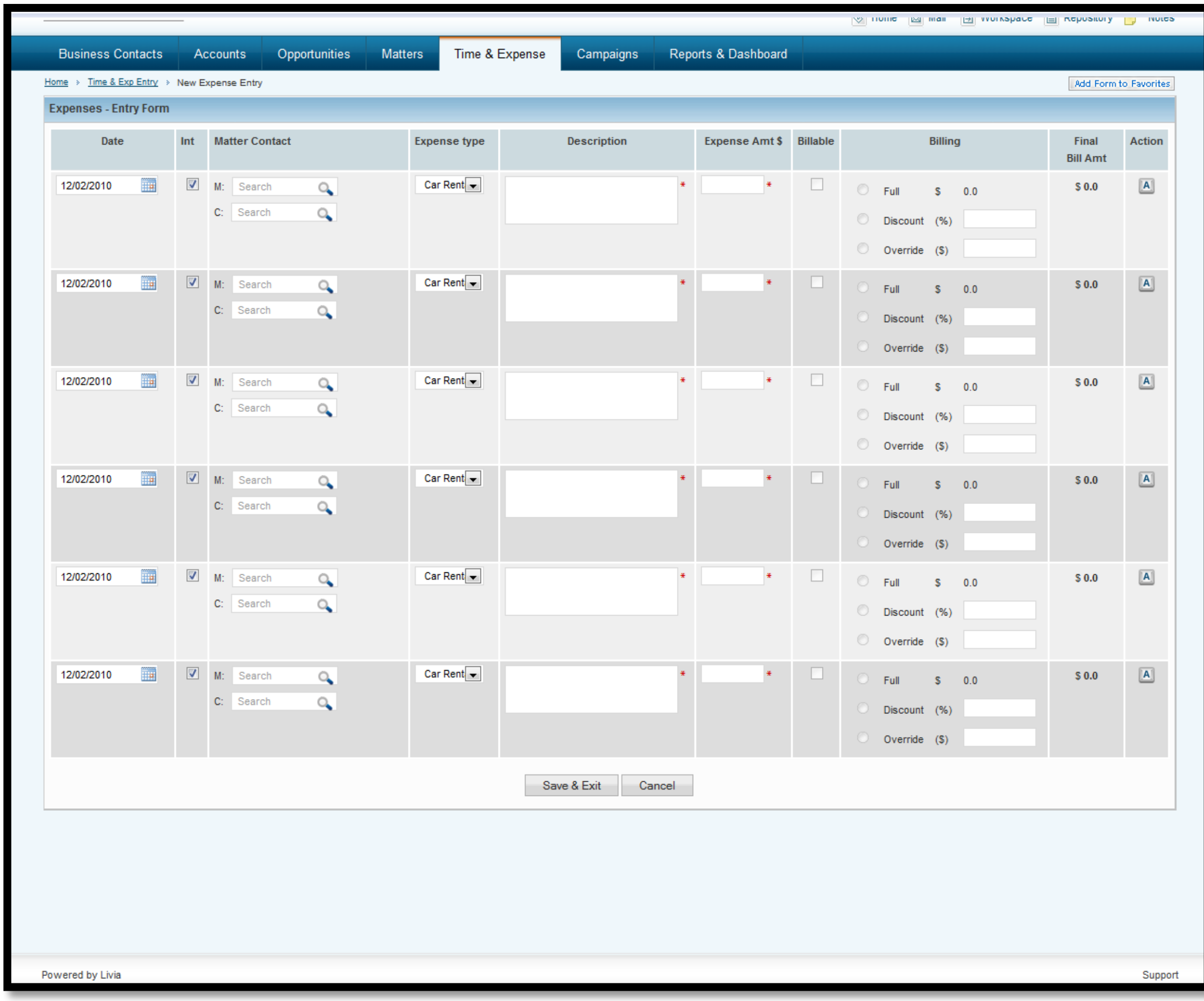




Q4: How do I add a New Expense Entry by selecting Matter/Contact?

- 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





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.

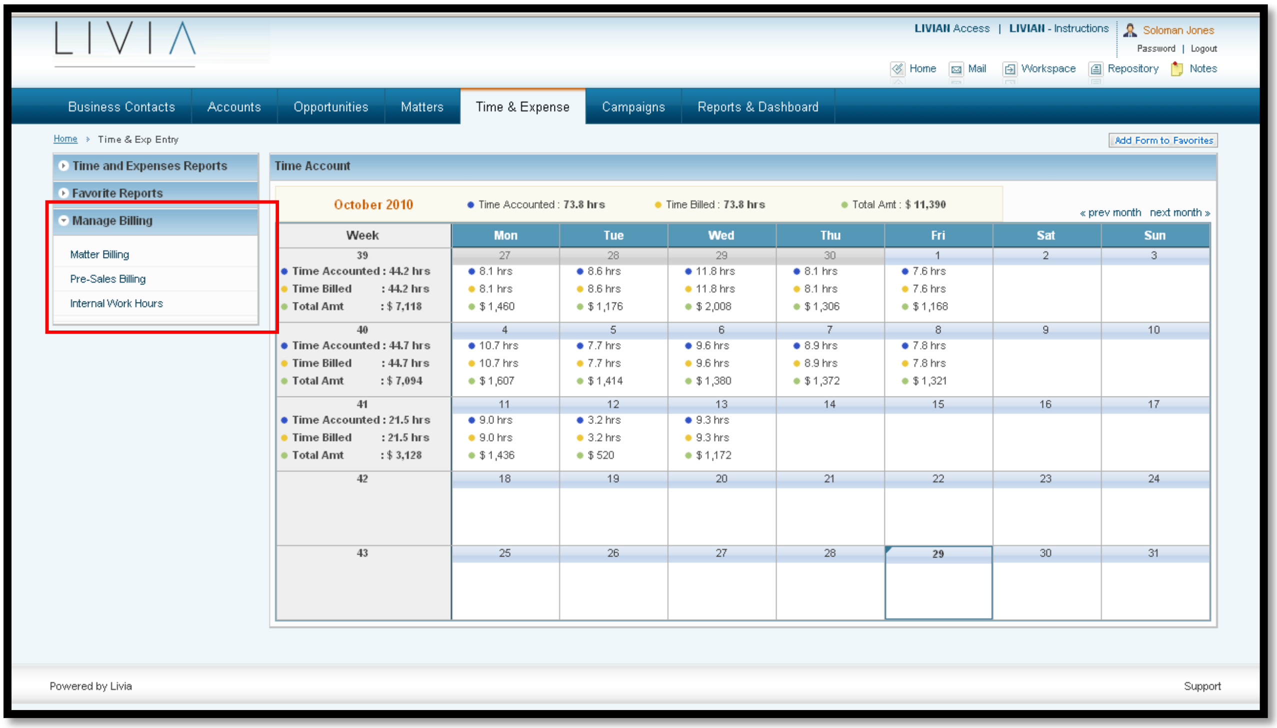
Q6: How do I Override an amount? (Same applies to Expense Entry)

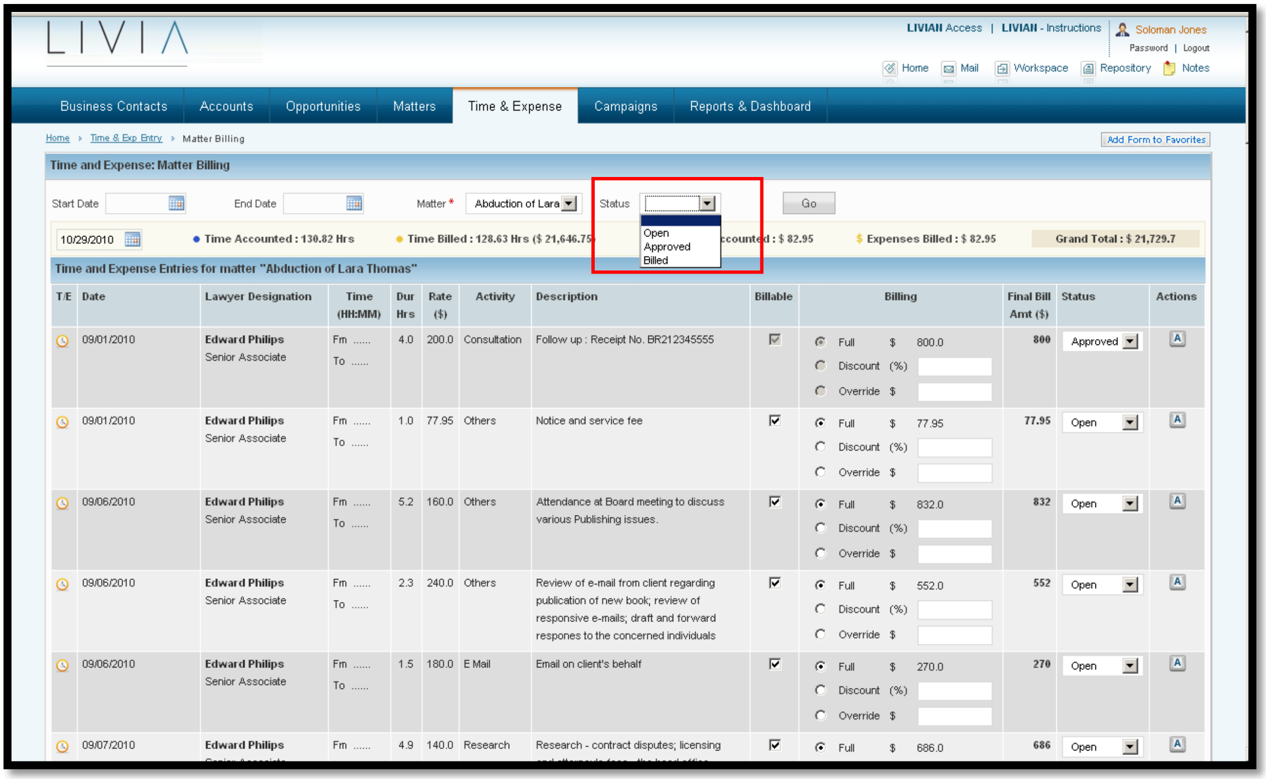
- Click on Add Expense Entry button. Search Matter or select Contact.
- Select Expense Type from the dropdown.
- Enter the description.
- Enter the Expense Amount.
- Check the billable checkbox.
- Click on Override radio button & enter the amount.
- Upload the document.

➢ 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.





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)?

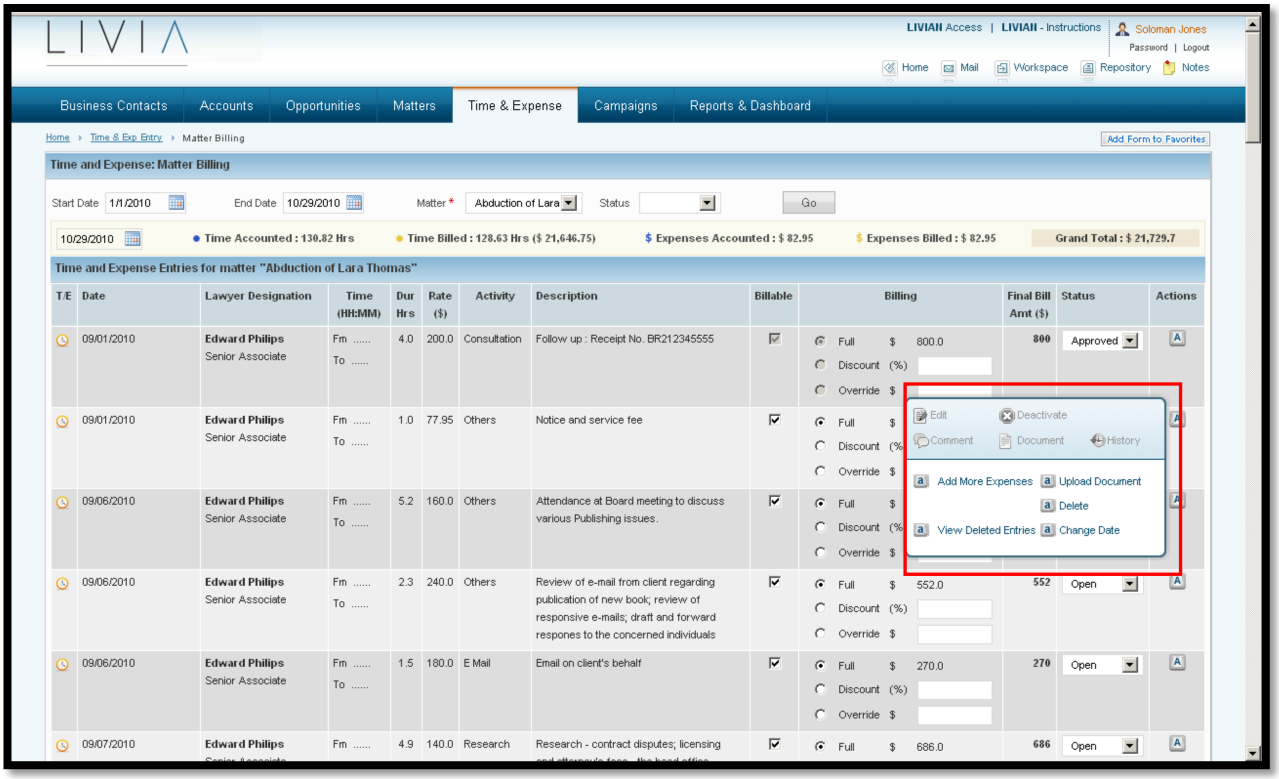
- Enter the start date & end date.
- Select the Contact from the drop down.
- Don't select any status from dropdown
- Click Go.
- Change the status of the Time entry to Open/Approved/Billed.

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



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”?

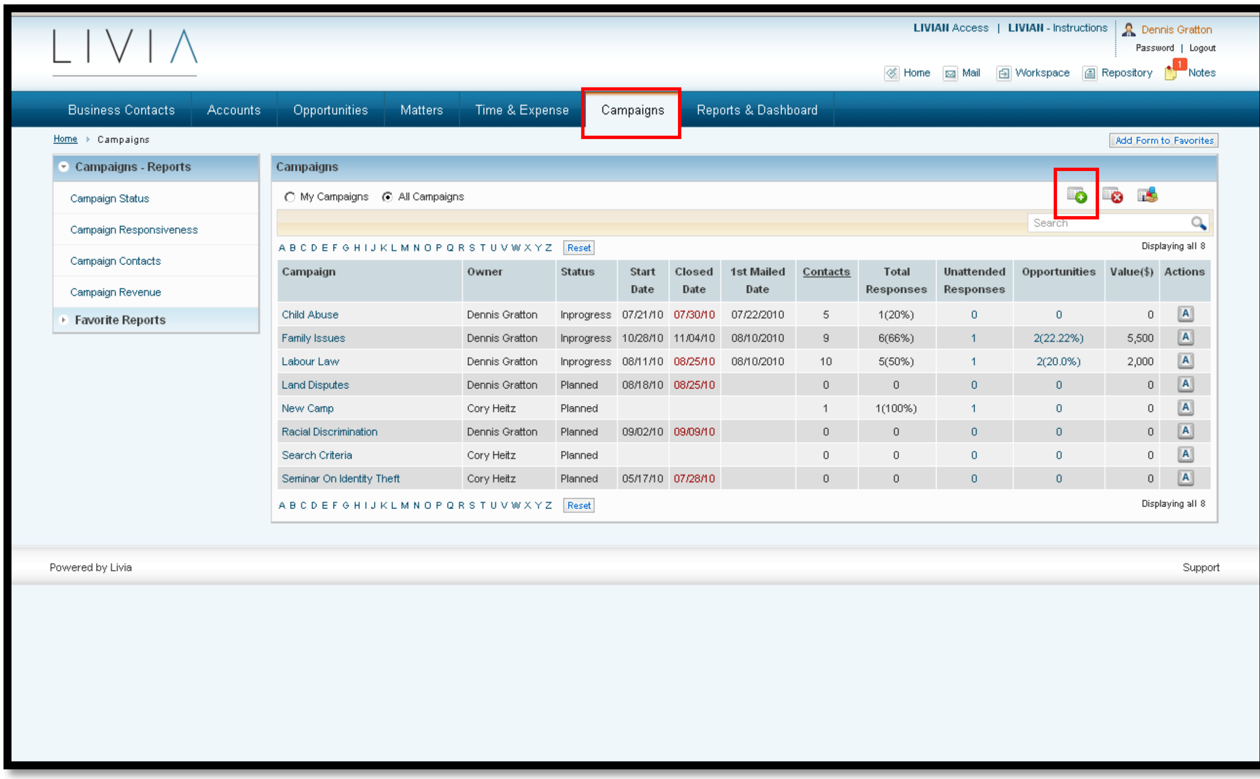
- Enter the start date & end date
- Click Go
- Check/Uncheck the billable checkbox to edit time entry

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



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 unattended 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

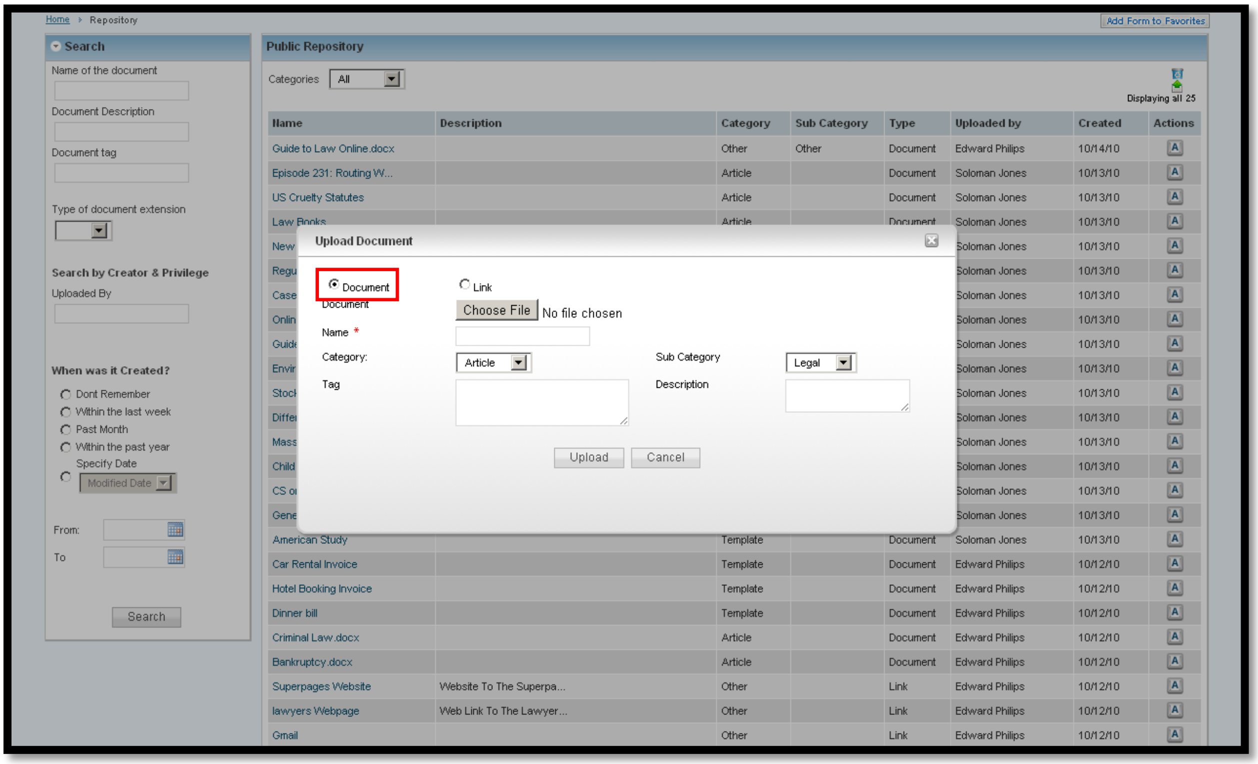
27. How can I search for my campaigns?
    - You can enter the entire name of the campaign or the first three letters of the campaign in the “search field”
    - You can search as per alphabet
    - You can search by contact
    - You can search by filter

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

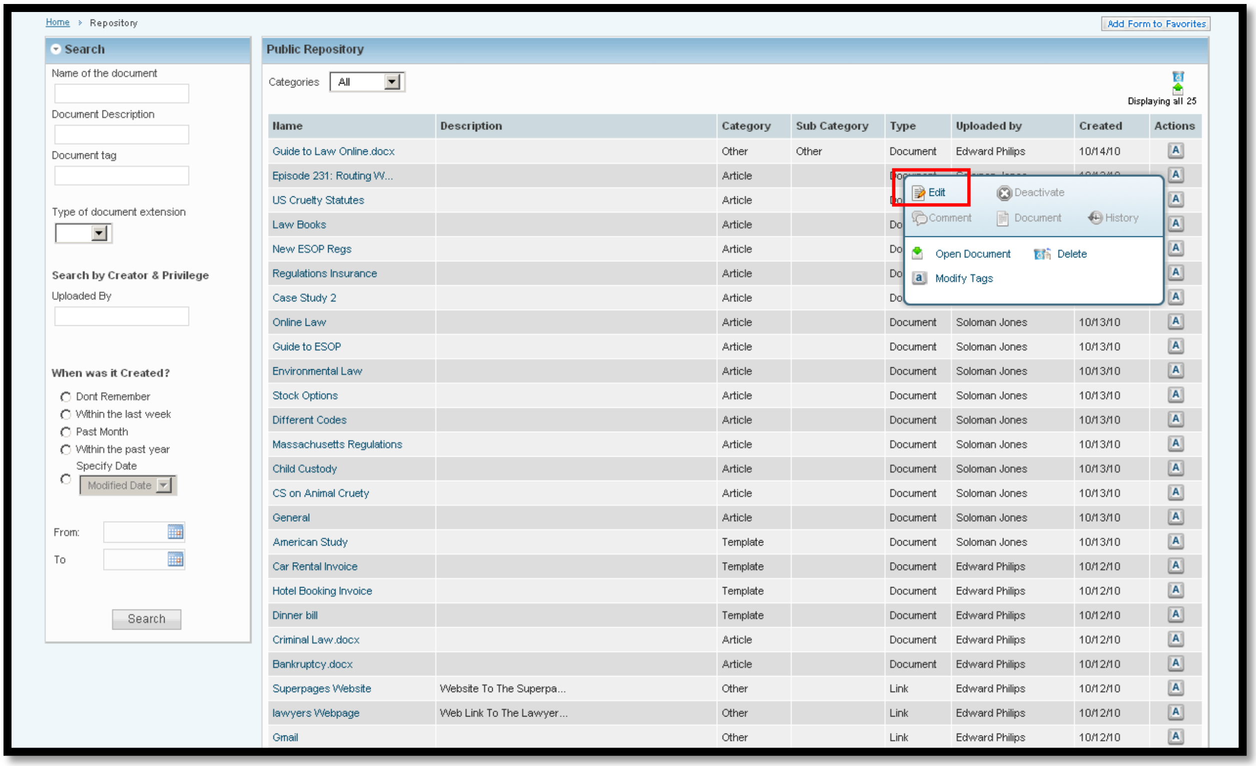
Q1: How Add/Upload a Document in Repository?

- 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.



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.

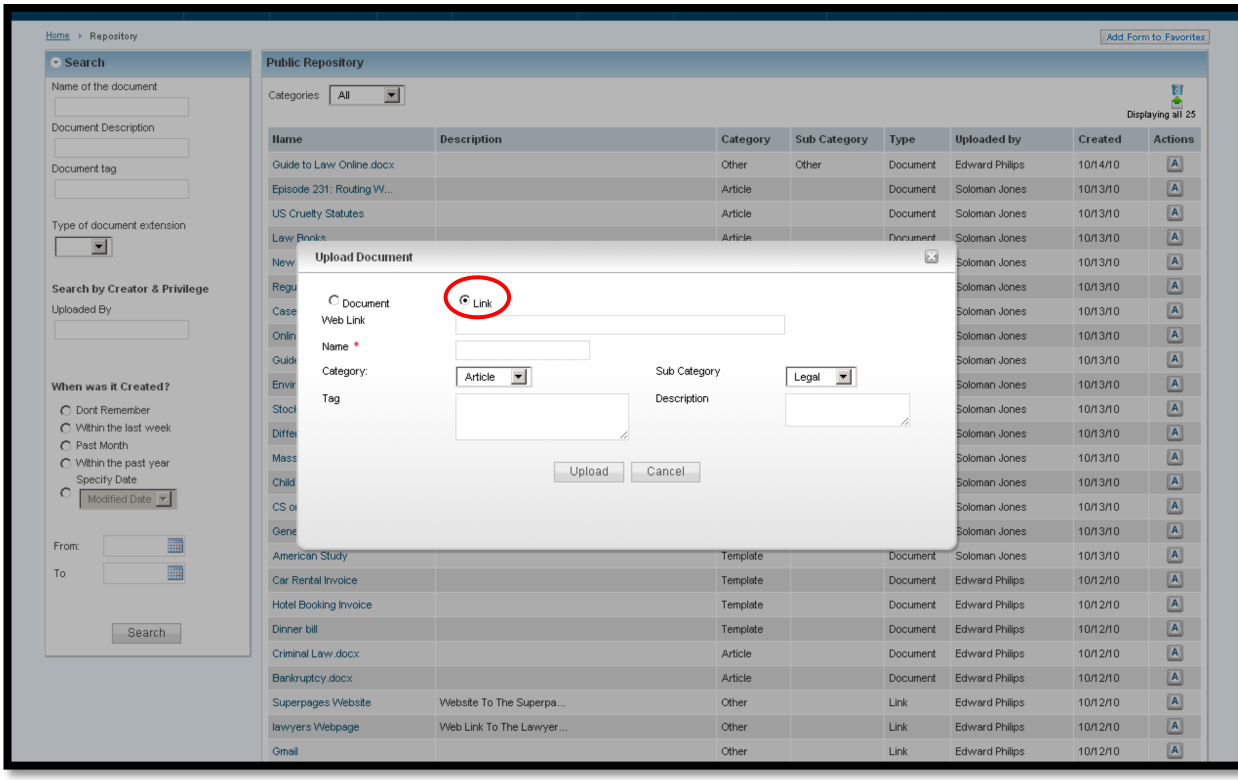


Q3: How do I Download doc from Edit action?

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

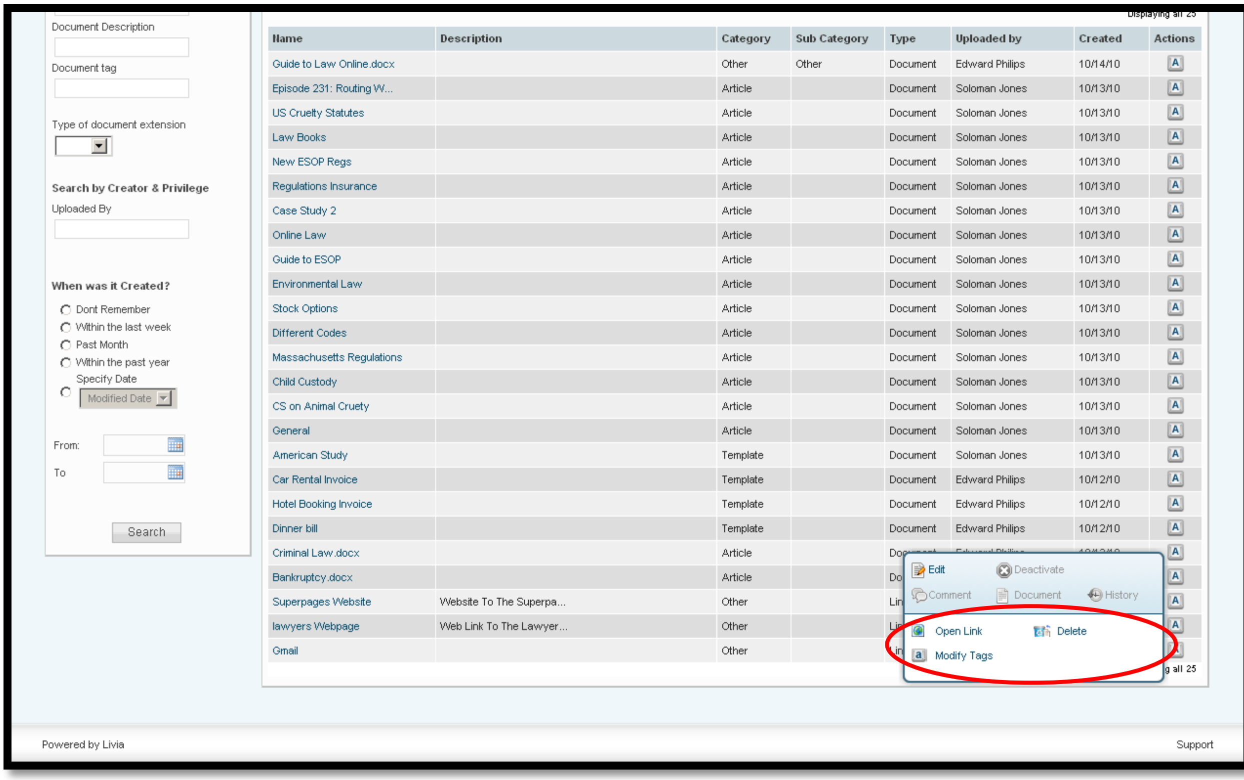
Q4: How do I cancel the add document functionality?

- 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.



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.

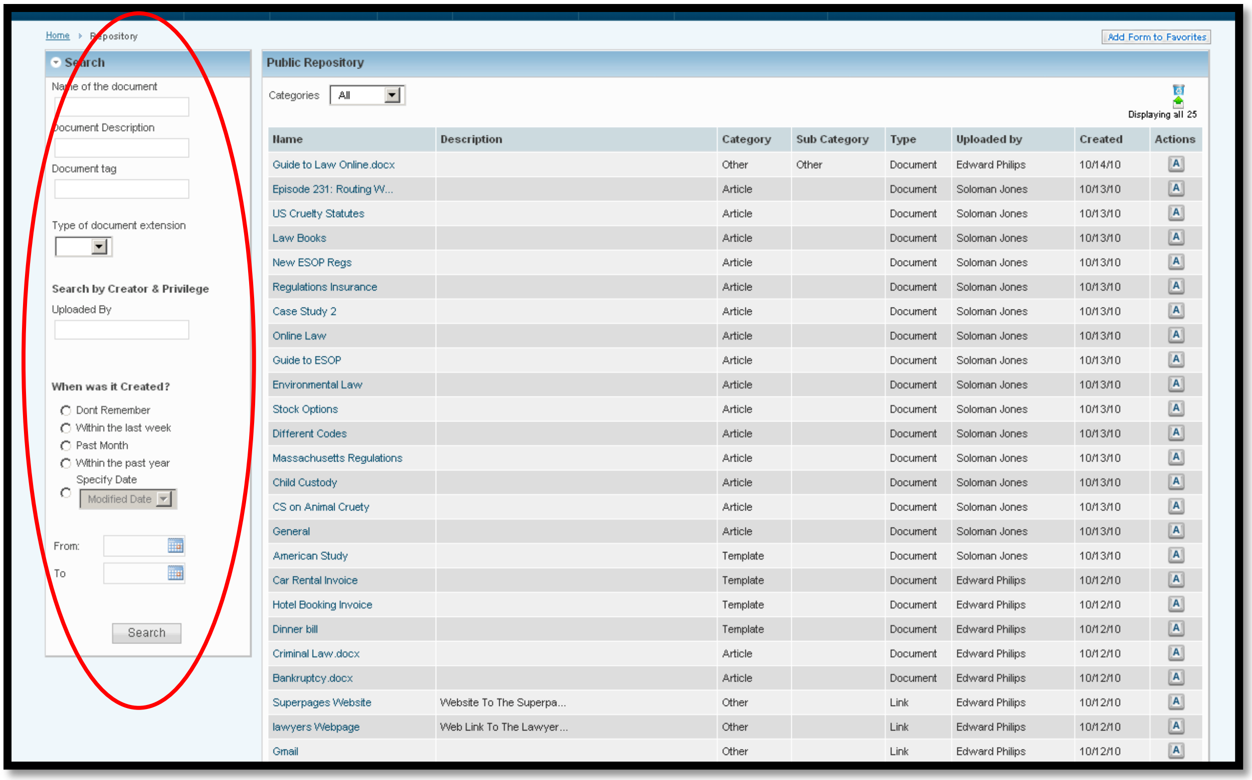


Q6: How do I cancel the Link functionality?

- ➢ 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.



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?

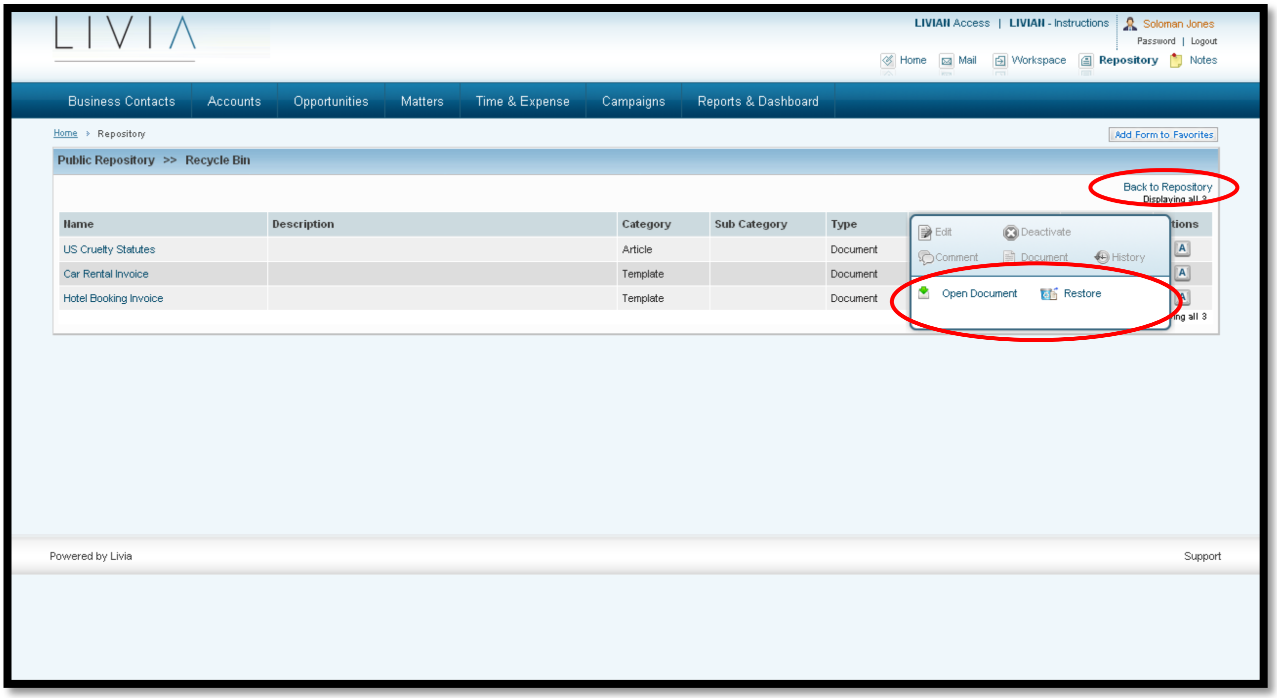
- ➢ Enter Document name in the search field. Enter the type of the document extension, check on include tag.
- ➢ Enter the Uploaded By and Author name.
- ➢ Click on Search

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?

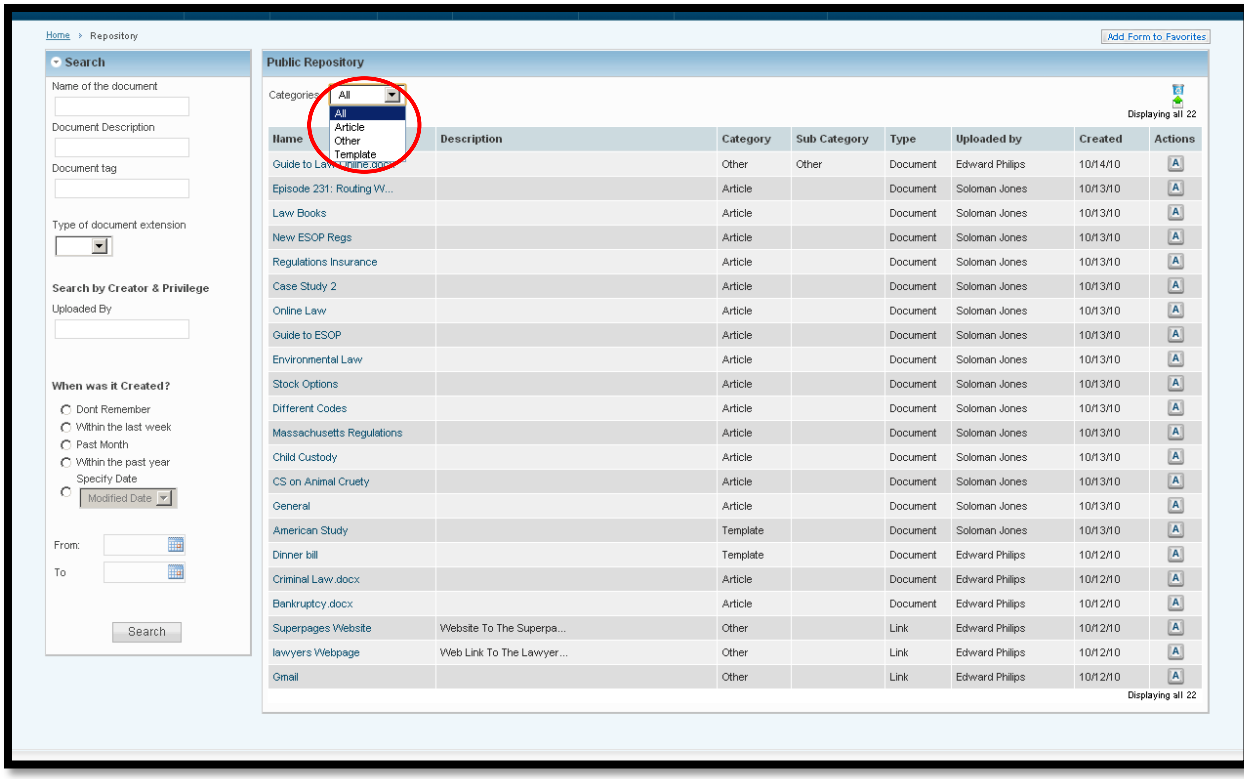
- Click on recycle bin.
- Click on the action pad, Action : Restore

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.

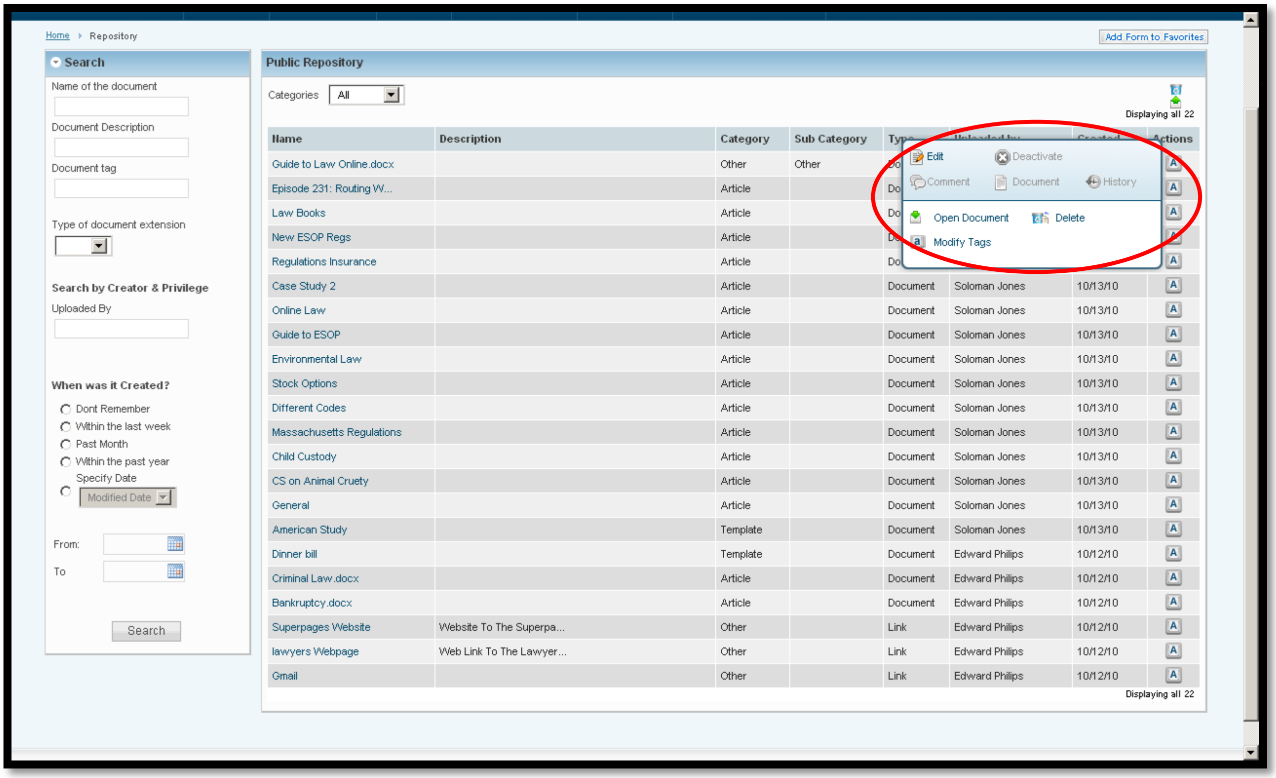
Q14: How do I go back to Repository?

- Click on the Back to Repository link



Q15: How do I View by Categories?

- 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

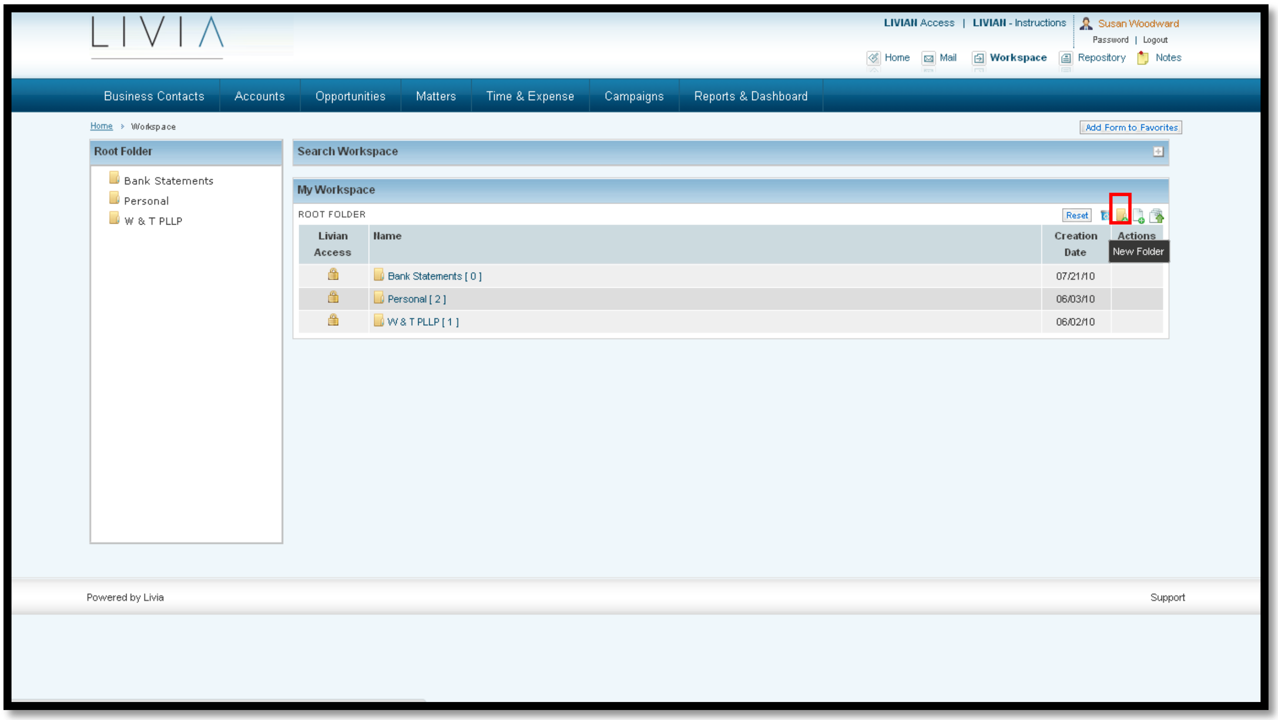
Q19: How do I Modify Tag?

➢ 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.)

04: 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?

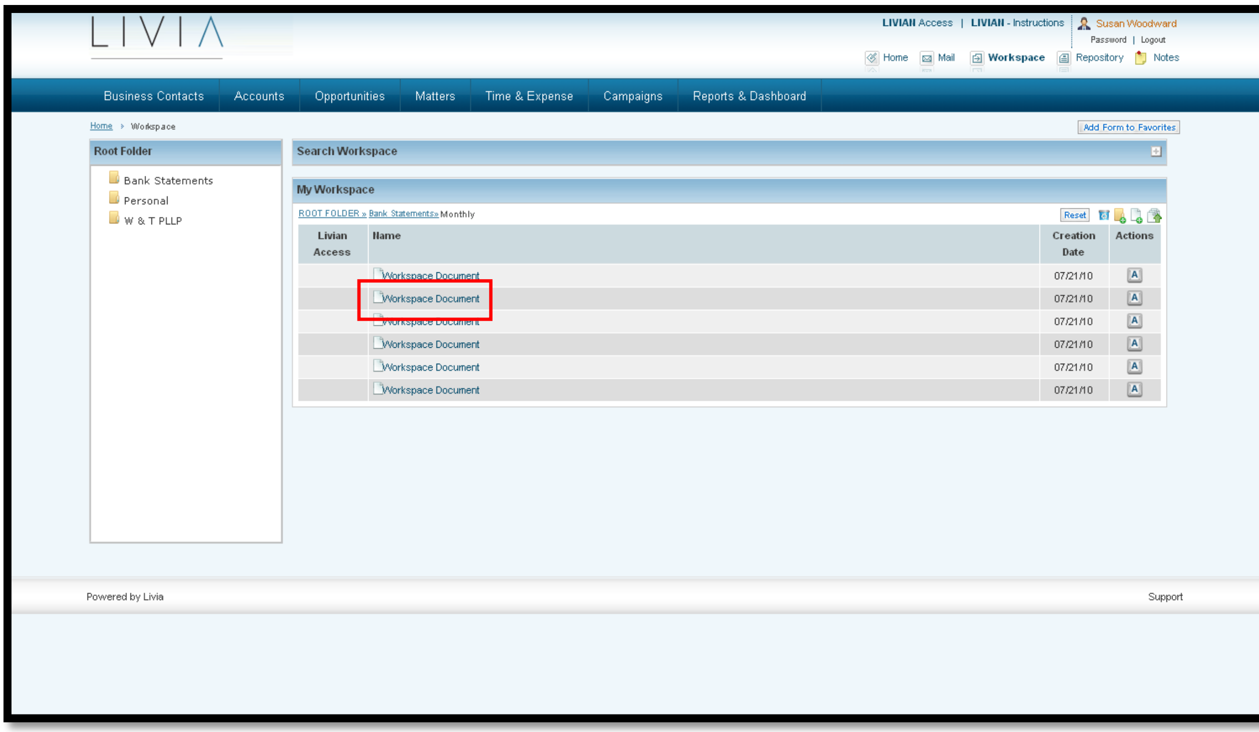
- Yes Multiple Upload of files is available.
- Click on " Workspace"
- Under My Workspace Click on Option "Mass Upload File"
- Select the required files
- Upload

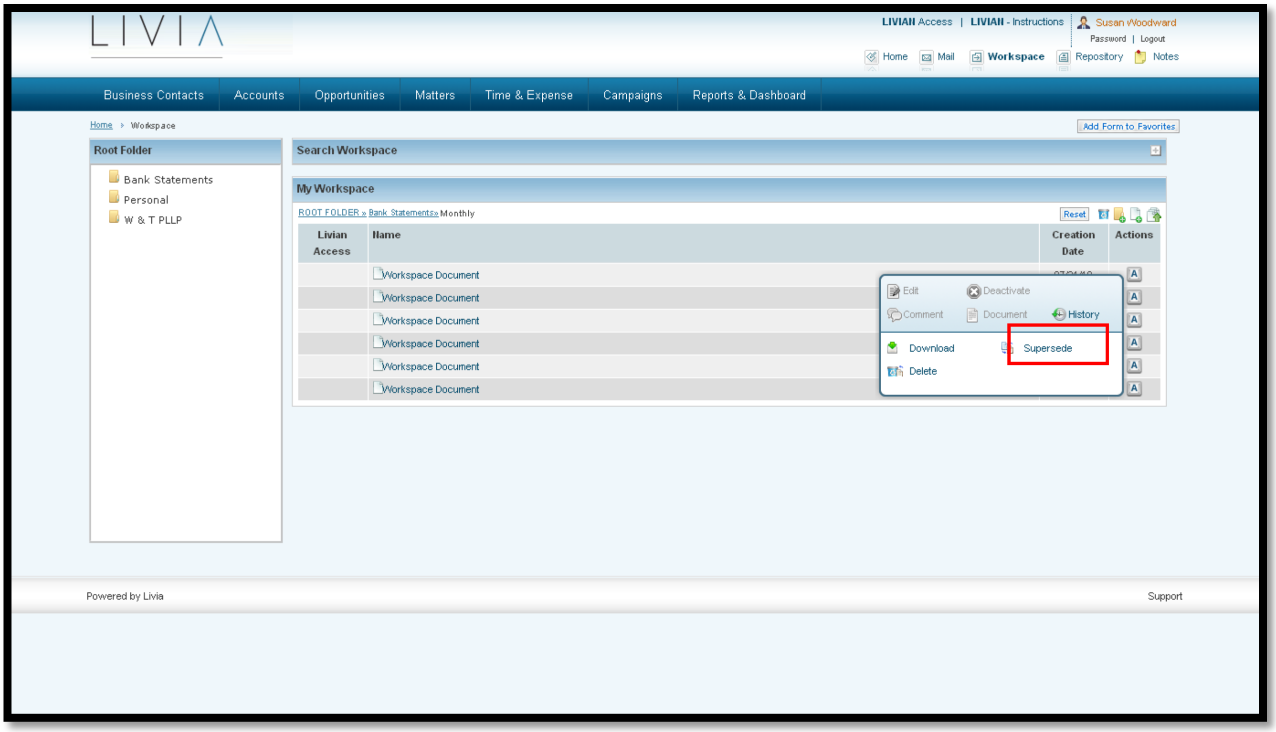
Q6: How can I get back to the Root Folder from the different folders?

- 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?

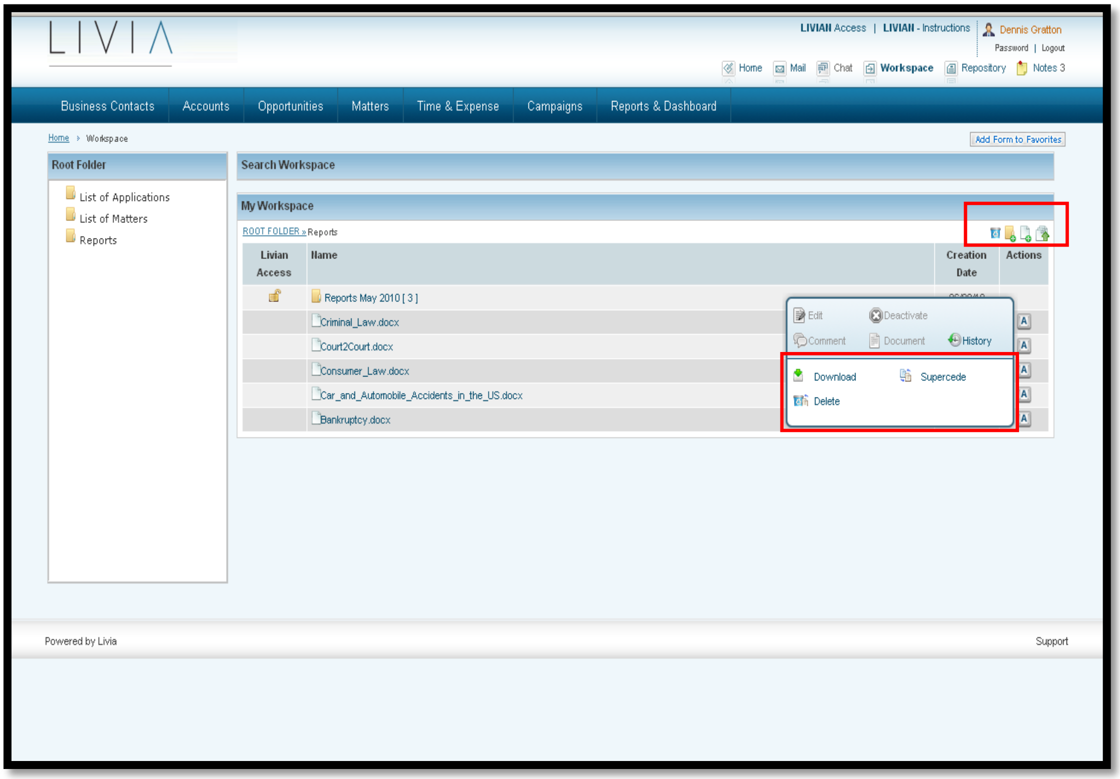
- Yes, you can view and download the documents under Re-Cycle Bin

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


LIVIA
LIVIAN Access | LIVIAN - Instructions
Dennis Gratton
Password | Logout
Home Mail Chat Workspace Repository Notes 3
Business Contacts
Accounts
Opportunities
Matters
Time & Expense
Campaigns
Reports & Dashboard
Home Workspace
Add Form to Favorites
Root Folder
List of Applications
List of Matters
Reports
Search Workspace
My Workspace
ROOT FOLDER » Reports
Livian Access
Name
Creation Date
Actions
Reports May 2010 [3]
Criminal_Law.docx
Court2Court.docx
Consumer_Law.docx
Car_and_Automobile_Accidents_in_the_US.docx
Bankruptcy.docx
Edit
Deactivate
Comment
Document
History
Download
Supercede
Delete
Powered by Livia
Support

s