Matter Overview

**What does the Matters feature in RunSensible allow you to do when managing legal cases?**

RunSensible’s Matters feature offers a centralized system for managing all aspects of legal cases, allowing you to organize and track important details in one place. This system securely stores all case-related documents, such as legal briefs, contracts, and court filings, making them easily accessible when needed. It also helps maintain a comprehensive record of communications, including client interactions and opposing counsel correspondence. The feature tracks important deadlines like court dates and filing schedules, with reminders and task management tools to ensure nothing is missed. By breaking down cases into manageable tasks, you can monitor progress and stay organized throughout the legal process, keeping all relevant information, documents, and timelines in one location for efficient case management.

**How can you create a new matter in the system, and what essential details must be entered in the form?**

To access and manage your legal cases, start by clicking on **Matters** located in the menu on the right side of your screen. This will bring up a list of all the cases you have previously created.

To create a new matter in the system, begin by clicking the **New** button located in the top right corner of the screen. This will open a form where you can enter the required information about the new matter. The form will ask for essential details such as the matter name, matter number, and court file number, which should be entered in their respective fields. These fields allow you to provide a clear identification for the matter, ensuring that it can be easily referenced and tracked later.

**How do you assign a responsible attorney and link a client to a new matter?**

Next, you will need to assign a responsible attorney for the matter. To do this, locate the **Responsible Attorney** dropdown menu within the form. Clicking on this menu will display a list of all the users registered in the system. From the list, choose the attorney who will be responsible for managing the matter.

After assigning the attorney, you’ll need to link the client associated with the matter. To select the client, click on the **Client** dropdown menu, which will present a list of all the contacts stored in your system. From this list, choose the contact involved in the matter you’re creating.

**What is the importance of assigning an appropriate matter pipeline, and how do you select it?**

Once the client is selected, you must assign the appropriate matter pipeline. The pipeline helps categorize and track the progress of different types of cases. To choose a pipeline, click on the **Pipeline** dropdown menu and select the one that best matches the nature of the matter. Different types of legal cases may require different pipelines, so it’s important to select the one most relevant to the matter at hand, ensuring that the case will follow a suitable workflow for effective management.

**How can you set a budget for a legal matter, and what should be included in this budget?**

Additionally, you have the option to set a budget for the matter within the form. In the **Budget** box at the top of the form, you can specify the financial resources allocated for handling the case, including projected costs for legal fees, expenses, and other related costs. Defining a budget helps you plan and manage the financial aspects of the matter, ensuring that resources are appropriately allocated and tracked throughout the case.

**What are the key dates to track when managing a legal matter, and why are they important?**

When managing a legal matter, it's essential to track key dates that mark different stages of the case.

The **Open Date** is the first of these, recording the exact moment the case is initiated. This date signifies the official start of the legal process.

Equally important is the **closing date**, which serves as a crucial deadline for concluding the case. Whether the matter is resolved through a settlement, judgment, or another form of resolution, the Closed Date represents the point by which the case must be finalized, helping to ensure that the legal process stays within an acceptable timeframe.

In addition to the primary dates, several other critical deadlines must be carefully tracked to ensure the smooth progression of a legal case. One of these is the **Pending Date**, which refers to upcoming deadlines or significant events scheduled as the case moves forward. These events can include court hearings, filing deadlines, or other essential tasks that need to be completed to advance the case. The Pending Date serves as a reminder to stay on top of these necessary actions, ensuring that no key steps are overlooked and preventing any delays in the legal process.

Another crucial date is the **Limitation** Date, which represents the last day by which legal action must be initiated if you wish to pursue a claim or lawsuit. This date is governed by the statute of limitations, a law that dictates how much time is available after an event—such as an injury or breach of contract—to file legal proceedings. Missing the Limitation Date can have serious consequences, as it may result in the permanent loss of the right to take legal action. If the case is not filed by this deadline, the opportunity to seek compensation, justice, or any other legal remedy may be lost entirely. Therefore, closely monitoring the Limitation Date is critical to ensure that legal rights are preserved and that timely action is taken within the legal timeframe.

**How do you use the Status of Limitation toggle?**

Next to the Limitation Date box, there is a toggle button labeled **Status of Limitation**. By switching this toggle to On, the system will notify you when the matter is approaching the specified limitation date. This feature is designed to ensure that you are alerted well in advance, giving you time to take any necessary actions before the limitation deadline expires. The notification system helps prevent missed deadlines and ensures that you stay on top of important legal timeframes related to the matter.

**How do you set user permissions for a matter?**

At the bottom of the form, you will find the Permission section. This section allows you to control which users have access to the matter. By default, the permission is set to **All**, meaning that all users in your system will be able to view and access this matter.

If you want to restrict access so that only the responsible attorney can see the matter, you can set the permission to **Handler**. This option ensures that only the user designated as the responsible attorney has access to the matter.

Alternatively, if you want to grant access to a specific team, you can set the permission to **Team**. When you select this option, a dropdown menu will appear, allowing you to choose the team that should have access to the matter. select the appropriate team from the dropdown list.

For more information about the teams, refer to the **Team Management** help file.

If you need to limit access to a particular user, you can set the permission to **Users**. Once selected, a dropdown menu will appear, where you can choose the specific user who should have access to the matter. This option is useful if you want to ensure that only a certain user can view and manage the matter.

Once all the necessary fields are filled out accurately, click the **Save** button, also located in the top right corner, to add the new case to your matters list.

**What should you do when encountering a conflict of interest when saving a new matter?**

After clicking the Save button, you may encounter a warning indicating a potential conflict of interest. This warning will be triggered if the system detects a conflict between your current matter and existing contacts. When this occurs, a list will appear displaying the names of the contacts with whom the conflict exists. You can click on each name in the list to view their detailed information panel, allowing you to understand the nature of the conflict.

Once this warning appears, you have a couple of options. On the lower right side of the screen, you will see a **Cancel** button, which you can click to stop the process and review the situation further. Alternatively, if you wish to proceed despite the conflict, you can check the **Conflict of Interest Checked** checkbox. This action will cause an OK button to appear next to the Cancel button. By clicking the **OK** button, you can confirm your decision to save the matter with the conflict of interest acknowledged.

Once your matter is saved, it will be added to the Matter List, where all your cases are organized and accessible. Within the Matter List, you can view your matters in one of two modes: Table View or Board View.

**How do you customize the Matter List in Table View?**

By default, the Matters List is displayed in Table View, which organizes your matters into a structured, grid-like format. This mode highlights the seven most important fields for each matter, presenting them as columns that allow you to quickly review and compare key information across all your cases.

In this mode, you can sort your matters by clicking on the name of any column. When you first click on a column name, the data in that column will be sorted in ascending order, meaning it will arrange the entries from least to most. After sorting, a small arrow will appear on the right side of the column name. If you wish to sort the data in descending order—from most to least, click on this arrow. The arrow will change direction, indicating the new sort order.

If you decide to remove the sorting applied to a column, you can do so by clicking the **X** button that appears next to the column name after sorting.

Additionally, you can apply multiple sorts simultaneously. You can achieve this by selecting and sorting multiple columns, enabling a more customized and layered view of your matters based on different criteria.

To customize these columns, start by clicking the **Grid Customization** button located at the top left corner. This will open a detailed customization menu where you can tailor the layout to meet your specific needs.

If you want to reorder the columns, locate the **Reorder** button next to each column name. Click and hold this button, then drag the column to your desired position within the list. This allows you to arrange the columns in a way that prioritizes the most relevant information for your workflow.

To rename a column so that it better reflects the data it represents, click directly on the current name within the **Title** column. This will enable you to edit and update the name to something more appropriate.

To adjust the visibility of each column, go to the **Width** column within the customization panel. Here, you can modify the width of individual columns by entering a new numerical value, ensuring that all your data is displayed clearly and fits within your preferred layout.

On the right side of the panel, you’ll find the **Show** column, which contains toggle buttons. These buttons allow you to show or hide specific columns in Table View mode, helping you focus on the most critical information and declutter your screen.

After you’ve made all your adjustments, click the **Save** button located at the top right corner of the screen.

In this mode, two buttons on the left side of each matter provide quick actions.

The first button is the **Quick View** button. When you click on this button, a small panel will appear on the right side of your screen, displaying the details of the selected matter without requiring you to exit the matters list.

The second button is a **Three Dots** menu that provides additional actions for managing your matter. When you click on this button, a menu will appear with two options. The first option is **Show Details**, which opens a full-screen view of the matter, allowing you to explore all aspects of the case in-depth.

The second option is **Remove**, which allows you to permanently delete the matter from your list, making it no longer accessible or visible in the system.

In the top right corner of the Table View mode, you'll find a set of action buttons designed to help you manage and organize your matters more effectively.

The first button on the right is the **Filter** button, which allows you to filter your matters based on various criteria.

For detailed instructions on how to use the Filter button, please refer to the **How to Use Filters Across the Platform** help file.

Next is the **Archive** button, which, when clicked, filters the list to show only the matters that have been closed or resolved.

The third button is the **Favorite** button, which filters the list to display only the matters you've marked as favorites. You can mark a matter as a favorite within its detail panel, a feature I'll explain further when we reach that section.

Additionally, at the top center of the list, you'll find a search box. You can use this search box to quickly locate a specific matter by typing in its name.

When you are in the table view mode, the default setting is configured to display 30 leads per page. If the total number of leads exceeds this limit, they will automatically be divided across multiple pages, allowing for easier navigation and management.

To move between these pages, locate the page numbers displayed at the bottom left corner of the leads list. These numbers represent the different pages containing additional leads. To view the leads on a specific page, click on the corresponding page number. This action will take you directly to that page, where you can see the next set of leads listed.

If you prefer to see more or fewer leads on each page, you can customize the number of leads displayed. To do this, locate the **Items Per Page** box, which can be found at the bottom right corner of the list. By entering a different number into this box, you can change how many leads are shown on each page. For example, if you input a higher number, more leads will be displayed on a single page, reducing the number of pages you need to navigate through. Conversely, entering a lower number will result in fewer leads per page, spreading them across more pages.

**How do you switch between Table View and Board View in the Matter List?**

You can switch to the Board View mode to gain better control over the status of each matter. In Board View, the focus is on the status of matters within each pipeline. The matters are displayed as cards under columns, with each column representing a different status within the selected pipeline. This visual layout allows you to see and manage matters based on their current status.

To switch to Board View, you first need to select the pipeline you want to work with. Start by clicking on the **Pipeline** dropdown menu located at the top center of the screen. From the dropdown list, select the specific pipeline you wish to view.

**Note:** When you select a pipeline, only the matters related to that specific pipeline will be shown in the Board View. If you have matters organized under different pipelines, you won’t be able to see all of them at once in the Board View. Instead, you will only see the matters associated with the pipeline you’ve chosen. To view matters from another pipeline, you will need to switch to that pipeline.

Once you’ve selected the desired pipeline, click on the **Board View** button located at the top right of the screen. This will display the matters in the chosen pipeline in the Board View format, allowing you to manage and track the status of those matters more effectively.

**How do you drag and drop matters in Board View to update their status?**

In this mode, each stage of the pipeline you have selected is displayed as a column, with the matters corresponding to each status listed under the appropriate column. You can change the status of a matter by dragging it from one column and dropping it into the column that represents the desired status. This intuitive drag-and-drop functionality allows you to quickly update the progress of your matters as they move through different stages of the pipeline.

In Board View mode, you can identify the client associated with each matter by looking at the hyperlink located at the top of the matter card. The client’s name is displayed as a clickable link. By clicking on the client’s name, you will be directed to their profile within the Contacts section, where you can view detailed information about the client.

Additionally, if you want to access more detailed information about a specific matter, click on the matter's name, which is also presented as a hyperlink. Clicking on the matter's name will take you directly into the matter’s details panel, where you can review and manage all aspects of the case.

The Matter Details panel is divided into two sections. The first section, located on the left side, provides various actions related to the matter.

At the top of this section, there is a picture placeholder where you can upload a specific logo or image for the matter. To upload an image, hover your cursor over the picture placeholder located on the left side. When you do this, an **Upload Picture** button will appear. Click on this button, and you'll be prompted to select an image or logo from your device that represents the matter. Once uploaded, this image will be displayed, allowing you to personalize the matter with a relevant visual.

Under the picture, you will see the name of the matter displayed. To the right of the matter name, there is a star-shaped button. By clicking on this **Star** button, you can mark the matter as a favorite. Marking a matter as a favorite allows you to identify and access it later, as it will be highlighted or filtered into your list of prioritized matters.

Directly under the matter's name, you'll find six action buttons that allow you to perform various tasks related to the matter.

The first button available is the **Email** button. By clicking on this button, you can send an email directly to the client associated with the matter. This feature allows you to quickly initiate communication without needing to leave the platform or open a separate email application. The system automatically links the email to the specific matter you’re working on, ensuring that all correspondence is properly organized and easy to access later.

The next button is the **Meet** button. Clicking on this button will open the New Event panel, where you can schedule a meeting related to the matter. In this panel, begin by entering the name of the event in the **Title** box. Next, use the Handler dropdown menu to select the user who will be responsible for managing the meeting.

In the **Attendees** box, you will initially see the name of the client associated with this matter, indicating that they are the primary participants who will be informed about the meeting. However, you can also search for and add additional contacts if you need to include more participants in the meeting beyond just the client. This allows you to organize meetings with multiple attendees as needed.

You’ll then need to select the calendar where you want this meeting to be displayed. Choose the appropriate calendar from the dropdown menu to ensure the meeting appears in the correct place. After that, set the exact **Start Date and Time** for the meeting, and specify its duration using the relevant boxes.

By default, a reminder is set to notify all attendees about the meeting 30 minutes before it starts, both via email and SMS. However, you can customize this reminder by clicking on the **Reminder Time** dropdown menu and choosing a different time. Additionally, you have the option to set a second reminder by using the **Second Reminder Date** dropdown.

On the right side of these dropdown menus, you’ll see two toggle buttons labeled **Notify By Email** and **Notify By SMS**. These toggles indicate whether the attendees will receive notifications about the meeting through email and SMS at the times you’ve set. You can choose to toggle one or both of these options off if you prefer that attendees do not receive these notifications.

Once done, click the **Save** button on the top right side to save the meeting.

The next button is the **Note** button. By clicking on this button, you can add both textual and voice notes to the matter, allowing you to document important information, reminders, or observations related to the case. To add a textual note, type your message in the provided text box. If you prefer to leave a voice note, click on the **Start Recording** button, and your audio will be captured and saved with the note.

Additionally, this feature offers the option to include a timesheet, enabling you to log the time spent on a particular task or action. By activating the **Duration** button, you can track the time associated with the note and, if applicable, charge your client accordingly.

When adding a note, you can enhance organization by applying tags to categorize and organize your notes, making it easier to retrieve specific information later. To do this, input the name of the tag in the **Assign Tag** box, select a color for the tag by clicking the white circle button on the right side of the box, and then click the Add button.

Moreover, you have the ability to set specific permission settings for each note. This allows you to control who within your organization can view or edit the note. The permission settings function as previously explained.

By using the Note button, you can efficiently keep track of critical details, whether for your own future reference or to share important information with other users working on the matter.

The next button is the **Log** button. this button allows you to document actions or events that occurred outside the software but are important to capture within the system. By clicking on the Log button, you can manually enter details about these external activities, ensuring that all relevant information is recorded and stored for future reference. After clicking the button, you will be prompted to select the type of action from the **Communication Type** dropdown menu, which categorizes the nature of the interaction. Next, you can specify the exact date and time of the communication to ensure accurate record-keeping. If additional context or details are needed, you can provide a description in the **Description** box. Once all the information is entered, click the **Save** button at the top right of the panel to securely store the log in the system. This process ensures that every significant interaction related to the matter is well-documented and easily accessible for future reference.

The next button is the **Bill** button. By clicking on this button, you can create a bill for your client, incorporating the timesheets that reflect the time spent on the case. After clicking the Bill button, the New Bill panel will open. In the **Bill to** box, you’ll see the name of the client for whom the bill is being created. This name is automatically populated based on the client associated with the matter, and it cannot be changed.

On the right side of the Bill to box, you'll find the Bill **Number** box. By default, the software generates a unique bill number for each bill you create. However, if you wish to customize the bill number, click on the **Settings** button located to the right of this box. Once clicked, you’ll see that each bill number consists of two parts: the Prefix and the Next Number, which are displayed in separate boxes. You can adjust both the prefix and the next number according to your preference. If you want to stop using the automatically generated bill numbers and apply your own numbering system, you can deactivate the **Continue auto-generating bill numbers** toggle button at the bottom of the settings. To do so, you’ll need to manually enter a bill number for each bill you create. After making your changes, click the Save button at the top right of the panel.

Next, select the currency in which you want the bill to be paid using the **Currency** dropdown menu. Then, set the **Bill Date** to reflect the date the bill is created and specify the **Due Date** by which the payment should be made. This step ensures that all billing details are accurate and aligned with your financial records.

Once you click on the Bill button, the system will automatically add all the timesheets associated with this matter to the bill. These are timesheets where the matter was selected in the Matter box during their creation. However, if there are tasks or actions you have completed that haven’t yet been logged in a timesheet, you can add them by clicking on the **Add Timesheet** button. This allows you to create the necessary timesheet and simultaneously include it in the bill, ensuring all billable activities are accurately recorded.

By default, the software is set to send a reminder to the client to pay the bill one week before the due date. If you wish to customize this reminder, click on the **Edit** button located to the right of the Bill Reminder toggle button under the timesheet section. Upon doing so, you will see three preset toggle options that you can activate individually or together, according to your preference: reminders can be sent one week before, three days before, or one day before the due date.

If these preset options do not meet your needs, you can activate the **Custom** toggle button at the bottom. Once activated, a panel will appear where you can specify exactly how many days before the bill’s due date you want the client to receive a reminder. You can set multiple custom reminders by clicking on the **Add More Custom Days** button. After configuring your reminder settings, click the **Save** button at the top right of the panel to apply your changes.

Additionally, if you prefer that no reminders be sent to the client, you can toggle off the **Bill Reminder** button. This will prevent any notification from being sent, allowing you to manage reminders manually or through other means.

By toggling the **Notify if the client hasn’t paid** button, you can configure a setting to inform a specific user if a client fails to pay their bill by the due date. When you toggle this button ON, a panel will open, allowing you to customize this notification.

First, select the user who should be informed from the **User List** dropdown menu. This ensures that the designated individual will receive updates regarding the client's payment status. Next, in the **Days After Due Date** box, enter the number of days after the bill’s due date when you want the user to be notified. This feature allows you to set a specific time frame for when the notification should be triggered.

Additionally, you can use the **Repetition Count** box to specify how many times the client must miss the payment due date before the user is notified. For instance, rather than notifying the user immediately after the first missed payment, you can set this feature to inform the user only after the client has missed multiple payment deadlines.

In the **Signature** dropdown menu, you’ll find a list of all the signatures you have previously set up within the software. Select the one that is most relevant to this bill from the dropdown menu to ensure the bill is properly authorized and personalized according to your standard practices.

For more information on how to add a digital signature, refer to the **Setting Up Your RunSensible Profile** help file.

In the **Note/Terms** box, you can input any explanations, additional information, or specific terms related to the bill. This is where you can clarify payment conditions, provide detailed instructions, or include any other pertinent details that the client should be aware of.

At the bottom of the panel, you’ll see the payment gateways integrated into your system. If you have multiple gateways available, you can choose the one you wish to use for processing this particular bill. This selection allows you to manage how payments are received, ensuring that they are routed through the preferred gateway.

The next button is the **Trust** button. By clicking on this button, you can request a specific amount of trust money from your client. Once you click the Trust button, a panel will open where you can enter the details of your trust request.

Start by inputting the **Date** of the trust request and the **Due Date** by which you expect the trust money to be received. These dates help establish the timeline for the request and ensure clarity in communication with your client.

Next, enter the amount you are requesting in the **Amount** box. This is the specific sum of money you are asking the client to deposit into the trust. If you need to provide additional context or details about the request, you can do so in the **Description** box. This is a space where you can explain the purpose of the trust request, outline any specific conditions, or provide other relevant information.

Once you have filled out all the necessary fields, click the **Save** button at the top right of the panel to finalize and send the trust request to your client.

**Note:** If you have trust money in your trust account, you can withdraw those funds by creating a bill for this matter. Once the bill is generated, you can apply the trust money toward the payment of that bill, ensuring proper use of the funds in accordance with the matter's needs. This process allows you to allocate the trust money appropriately while keeping accurate financial records.

At the bottom of the left side of the matter detail panel, you’ll find a quick view of all the basic information related to the matter. This includes details like the client’s name, the practice area, and some information about the matter’s accounting status. This section is designed to give you immediate access to the key details you need.

On the right side of the matter's detail panel, you’ll find a series of tabs that provide access to different functions and features related to the matter.

The first tab is the **Information** tab. By selecting this tab, you can access all the fields containing information related to the matter. This includes details such as the matter's title, description, relevant dates, and any other important data associated with the case. Additionally, you have the ability to modify any existing information or add new details as needed.

For more information about customizing the information fields in the **Information** tab, refer to the **Custom Fields** help file.

**Note:** After making any changes in the Information tab, you must click the Save button located at the top right of the detail panel to ensure your changes are saved. If you don’t click Save, the updates will not be applied.

**How do you add and manage tasks for a matter in the List tab?**

The next tab is the **List** tab. Under this tab, you can view each status of the matter's pipeline, organized into different sections. Each section represents a specific stage in the pipeline, allowing you to manage the progress of the matter effectively.

Within each section, you can add specific tasks that need to be completed when the matter reaches a particular status in the pipeline. This feature allows you to assign tasks to users within your firm, ensuring that the necessary actions are taken as the matter progresses through each stage. By setting up tasks under the List tab, you can streamline workflow and ensure that all steps are completed at the appropriate time.

To add tasks under each status, click on the **Add Task** button located on the right side of the status section where you want to assign a task. This will open the Add Task panel. Start by entering the name of the task in the **Name** box. Next, determine the type of communication required at this stage by selecting an option from the **Communication** dropdown menu. In the **Assignee** dropdown menu, choose the user responsible for completing this task.

By default, tasks you create do not have a due date. However, if you wish to assign a due date, you can do so by clicking on the **Add Due Date** link, which is highlighted in blue. When you click this link, an additional panel will open at the bottom of the task creation form. In this panel, you can specify how many days before or after a key project date the task should be completed. Specifically, you can choose to set the due date relative to the start or end date of the project. To do this, enter the number of days and then use the dropdown menu on the right to select whether the task should be due After the Start Date or Before the End Date of the project.

**Note:** The tasks you add to a matter's status are not assigned to any specific project. However, you can still view and manage these tasks by clicking the All Tasks button in the Projects section. This allows you to track all tasks related to the matter, even if they aren't linked to a particular project, ensuring you have a complete view of all actions needed for the matter.

**How do you use the Communication tab to view interactions for a matter?**

The next tab is the **Communication** tab, where you can view every interaction related to the matter, including notes, emails, events, and logs. This tab serves as a comprehensive record of all communications associated with the matter, providing a centralized location where you can easily track and review each interaction. Whether it’s a note documenting a conversation, an email exchange, a scheduled event, or a log of actions taken, all relevant communication details are meticulously recorded here. This ensures that you maintain a complete and organized history of all interactions related to the matter.

Within this panel, each record displays important information, including the user who performed the interaction and the exact date and time it occurred, which is shown in the bottom right corner of the record. Additionally, on the bottom left side of each record, there is a **View Details** button. By clicking this button, you can access more in-depth information about the interaction and, if necessary, make edits or updates.

At the top of the Communication tab, you will find four checkboxes labeled **Notes**, **Emails**, **Events**, and **Logs**. By default, all of these checkboxes are selected, meaning that all types of interactions are displayed in this tab. However, if you prefer to focus on specific types of interactions, you can uncheck any of these boxes to filter the view accordingly. This allows you to customize the information you see, making it easier to manage and review the interactions that are most relevant to your current needs.

**How do you create a new event for a matter in the Events tab?**

The next tab is the Events tab. In this tab, you will find a comprehensive list of all meetings and events associated with the matter. This allows you to track and manage every scheduled or past event related to the case. To add a new event, click the **New Event** button. This feature functions in the same way as the Meet button, which has been previously explained. By using the New Event button, you can create and schedule upcoming events, ensuring that all relevant activities are properly documented and organized within the matter.

**Note:** In this tab, you can view all events related to the matter, whether they were created using the Meet button from the left sidebar of the matter detail panel or by clicking the New Event button within the Events tab.

**How do you add or customize intake forms for a matter?**

The next tab is the **Intake Form** tab. This tab provides the flexibility to either customize existing intake forms or create entirely new ones tailored specifically to each matter. When you add an intake form to a matter's Intake Form tab, the system automatically creates a link so that the intake form would be specifically for this matter and you would be able to see the information after the client has submitted them within this tab.

To use an existing intake form, start by clicking the **Add Intake** Form button located at the top left corner of the screen. This will open a dropdown menu displaying all the available templates. From this menu, you can select the template that best suits your needs. After making your selection, click **Save** to add the form to the matter's Intake Form tab.

If the available templates do not meet your needs, you can create a new intake form by clicking the **Generate Intake Template** button. This feature allows you to design a form from scratch, ensuring that it meets your specific requirements. Once you've created and saved this new template, it will be available in your template list for future use. You can then select this custom template and add it to the matter's Intake Form tab just as you would with any other template.

When managing intake forms, you have five essential action buttons that help streamline your workflow and enhance efficiency.

The **View** button allows you to review the form in detail, print it, or download it as a PDF. If the client has submitted information through this intake form, you’ll be able to see the completed fields under the relevant sections. When you use the **Print** or **Download** button, the submitted information will also be included, ensuring you have a complete record of the client's responses.

The **Rename** button helps you keep your forms organized by allowing you to change the form’s name within the Matter tab. This feature is particularly useful when managing multiple forms for the same matter, as it helps distinguish between different versions or types of forms.

The **Copy Link** button generates a shareable link specific to the matter, making it easy to distribute the form via email or other communication platforms. By sending the intake form to the client using this link, you can later view the submitted information through the View button, ensuring that all data is captured and accessible.

The **Email** button allows you to send the form directly to the client’s email address without the need for manual attachments.

Finally, the **Trash** button lets you delete the form when it’s no longer needed.

In the Status column, you can easily track whether the intake form has been completed. Additionally, the Sent Date column shows the exact date the intake form was sent to the client, while the Completed Date column records when the client completed and submitted the form. These columns provide a clear overview of the form's progress and ensure that you are always informed about the status of your intake processes.

**How do you manage contacts within the Parties tab?**

The next tab, labeled **Parties**, allows you to add and manage contacts connected to a specific matter. This feature helps you keep track of all relevant individuals in one centralized location, whether they are clients, witnesses, experts, or any other party involved in the matter. By organizing these contacts within the Parties tab, you can access their details and monitor their involvement in the case.

The Parties tab integrates closely with the Document tab, allowing for efficient management of contacts and their roles within a matter. When a contact is assigned to a specific role, such as a client or witness, in the Parties tab, their information is automatically transferred to the corresponding sections of documents added in the Document tab, eliminating the need for manual data entry. This ensures that the relevant contact details are included accurately in all documents. Additionally, the integration works both ways: if a contact is assigned a role while adding a document in the Document tab, that contact is automatically added to the Parties tab under the appropriate role. This connection keeps contact information and role assignments consistently aligned across both tabs, ensuring accurate and organized records for all parties involved in a matter.

To add a new contact in the Parties tab, begin by clicking the **Add Contact** button located at the top right corner of the screen. This will initiate the process of linking a contact to the matter. After clicking this button, a dropdown menu labeled **Contact** will appear. From this menu, you can select the contact you wish to associate with the matter. The dropdown menu will display a list of all the contacts stored in your system, making it easy to find and choose the appropriate individual.

Once you have selected the contact, the next step is to define the nature of their relationship with the matter. To do this, click on the **Relation** dropdown menu, where you can choose the role or relationship type that best describes the contact’s involvement in the case. If the specific role or relationship type you need is not listed, you can create a new one by clicking on the **Add Relation** link, which appears in blue at the bottom of the list.

Clicking the Add Relation link will open the Add Relation panel. In this panel, you can enter the name of the new role in the **Name** box. Additionally, you have the option to assign a color to the role, which can help visually distinguish different types of relationships within the system. After entering the desired role and selecting a color (if applicable), click the **Save** button at the top right corner of the panel to add this new role to your list of available relationship types.

**How do you handle bills and trust funds in the Bill tab?**

The **Bill** tab offers a comprehensive overview of all financial transactions related to the matter. This section allows you to easily access a detailed list of every bill that has been generated, along with the corresponding trust funds that have been established. The Bill tab is designed to keep all financial records, including invoices and trust fund allocations, meticulously organized and readily available for review.

Within the Bill tab, several key columns provide essential details about each financial entry. The Bill Number column displays the unique identifier assigned to each bill, making it easy to track and reference specific transactions.

The Price column shows the financial amount associated with each bill or trust fund.

The Status column indicates the current standing of each bill, showing whether it has been sent to the client, paid, or remains in draft form.

Finally, the Type column specifies whether the entry is a bill or a trust fund. This distinction allows you to differentiate between various types of financial transactions.

On the right side of each record within the Bill tab, you’ll find two buttons that allow you to manage the entry effectively. The first button is the **View Details** button. Clicking this button will take you directly to the detailed panel for that specific bill, where you can view all related information. This panel provides a comprehensive overview of the bill, allowing you to make any necessary changes, such as updating details, sending the bill to the client, or marking it as paid. This feature ensures that you have full control over each bill, from creation to finalization, all within a centralized location.

For more detailed information on this topic, please refer to the **Bills** help file.

The second button is the **Trash** button, which allows you to delete the record entirely. If a bill or trust fund entry is no longer needed or was created in error, you can use this button to remove it from the system.

**How do you upload and manage documents in the Document tab?**

The next section you'll encounter is the **Document** tab, which is designed to help you manage all the documents related to a specific matter. Within this tab, you can upload, organize, and work with the documents needed for your case or project. To upload a document, click on the **Upload** button. This action will open an upload panel where you can select and upload the file you need.

In addition to uploading individual documents, you can also use document templates within the Document tab. Document templates are particularly useful because they allow you to customize documents based on the specific information related to the matter at hand. When you upload a document template, the system will automatically populate the template with the relevant information. This information is drawn from the Matters Information tab and the details of contacts you have assigned specific roles in the Associated Contacts tab.

For instance, if your template includes placeholders for important details such as client names, dates, or other relevant information, the system will automatically populate these fields with the data you have already entered in the Information tab of the contact assigned to the client role for that particular matter. This automated process draws directly from the contact information you've previously input, ensuring that all necessary details are filled in accurately without requiring manual entry. By pulling directly from the provided data, this method enhances precision and reduces the chance of errors, streamlining the document preparation process.

To add a document template, begin by clicking the **Create Document** Form Template button located at the top of the page. Once clicked, a panel with three tabs will appear, each designed to help you manage your document templates effectively.

The first tab, labeled **Templates**, displays a list of all the document templates you have personally created within the system. This is where you can easily access, review, and manage your customized templates.

For more information about creating a document template, refer to the **Document Template** help file.

The second tab is **RunSensible Templates**. This tab contains a collection of pre-built templates provided by the system. These default templates are ready to use and can be modified to fit the specific needs of your case or project.

The final tab is called **Set**. This tab allows you to organize and group your templates for easier management. You can select multiple templates simultaneously, making it more convenient to apply them to different matters.

**Note:** The sets available in the Set tab are the ones you previously created in the Document Template Settings. However, you won’t be able to make any changes to these sets from the Set tab. To modify them, you’ll need to go back to the Document Template Settings where they were originally created.

In each of these tabs, you will find two action buttons next to every listed template. The first button is **Preview**. Clicking this will allow you to see the template before making any selections, giving you the opportunity to verify that it suits your requirements. The second button is **Select**. By clicking Select, you choose the template that you want to add to the matter's Document tab.

After selecting the desired template, you will be taken to a new page where the name of the chosen template will appear in the Template box. At this point, it’s important to carefully verify that the correct template has been selected. If you have selected a set of templates from the previous step, you will see multiple templates listed in this box. Take a moment to review them to ensure they are the ones you intend to use. Once you've confirmed the selection, click the **Next** button located at the bottom left of the page to proceed.

On the next page, you'll see several dropdown menus corresponding to the different roles defined within the template. These dropdowns allow you to assign contacts to each role. Select the appropriate contact for each role by clicking the corresponding dropdown menu. If more than one contact serves the same role in the matter, you can select multiple contacts. After assigning the roles, click the Next button to proceed.

**Note:** If you've already added a contact to a specific role in the Parties tab, their name will appear in the relevant drop-down menu for that role. If you haven’t added the contact yet, selecting the correct contact from the drop-down menu will automatically add them to the Parties tab under the appropriate role.

On the following page, you will have the opportunity to review and edit the

information that will be automatically inserted into the document. Each role you defined during the creation of the template will appear as a separate tab, allowing for organized and easy navigation. Within each role tab, you will find the specific information types that were designated to be filled in during the template setup. This can include details like the first name, last name, or any other contact-related information necessary for the document.

If you have assigned multiple contacts to a single role, separate information panels for each contact will be displayed under that role’s tab. This ensures that all relevant individuals are represented, and you can review each contact's details individually. In case any of the populated information is incorrect or incomplete, you can manually modify the fields to ensure accuracy.

Once you are satisfied with the accuracy of the data, click the **Next** button to proceed.

In the final step, you’ll be presented with the complete version of the document, fully populated with the relevant information. Review the document carefully for any errors or missing details. Once everything is correct, click the **Save Document** button to save the completed document under the matter’s Document tab alongside other related files.

In the Document tab, can create folders to help organize your files. To do this, click on the **New Folder** button located at the top of the page. A pop-up will appear where you can enter the desired name for the folder in the Folder Name box. Once you've entered the name, click the **Save** button to create the folder.

Additionally, in the Document tab, there is a button labeled **Run Drive**. By clicking on this button, you can download the Run Drive app to your PC. Once installed, this app will create a dedicated drive on your computer called Run Drive. This drive will sync all the documents and templates you have within the system directly to your computer’s desktop, giving you convenient offline access to your files. With Run Drive, you can manage and interact with your documents and templates as if they were stored locally on your computer.

**How do you log and categorize expenses in the Expense tab?**

The next tab is the **Expense** tab. Within this tab, you can manage all costs related to a specific matter. Whether these expenses are incurred directly for a particular matter or are general expenses not tied to any specific case, recording them under the relevant matter is essential, especially if you intend to be reimbursed by your client. Accurately logging these expenses ensures that you maintain transparency and can recover costs effectively.

When determining whether to include an expense under a particular matter, it is important to assess its direct relevance. You must decide whether the expense is directly tied to the case or a general cost related to the overall management of cases. This decision depends on categorizing the expense as either a hard or soft expense.

Expenses can be divided into two main categories: hard expenses and soft expenses. hard expenses, also known as direct or tangible costs, are expenses directly linked to a specific matter. These are measurable, identifiable, and clearly associated with the matter in question, such as court filing fees or expert witness costs.

On the other hand, soft expenses, also called indirect or intangible costs, do not have a direct link to any particular matter. These may include general office expenses or administrative fees. While soft expenses are more difficult to quantify and may not have an obvious impact on the final deliverable, they still represent costs that must be accounted for in the overall financial management of your cases.

**Adding Soft Expenses**

To add a general expense, first click the **Add Soft Expense** button at the top of the screen. This will present you with two options: to either create a new expense or choose an existing one. If the expense you want to record is new and hasn't been added to your expense list yet, select the **New** option. This will open a New Expense panel where you can enter the details of the expense.

In the **Expense Title** box, provide a name for the expense, and in the **Expense Date** box, specify the date the expense was incurred. Use the **Description** box to provide any necessary additional details about the expense.

Next, categorize the expense by clicking **Add Item**. In the **Select Category** drop-down menu, choose the appropriate category for the expense. If the desired category isn’t listed, click the **Add Category** link in blue at the bottom of the menu. A form will appear where you can name the new category and, if necessary, assign a **Parent Category** for broader accounting purposes. Once you complete this, click the **Save** button to add the new category to the list.

After selecting the category, complete the other fields by entering the item’s name, providing a description (if necessary), and specifying the price. If you already set a price when creating the category, this will automatically populate in the Price box. Finally, enter the quantity of the item and review the TotalCost column, which will calculate the overall expense. Add more items as needed, and once finished, click the **Save** button at the top of the screen to log the entire expense.

If the expense you want to record already exists in your expense list, select **From Existing** from the drop-down menu and choose the appropriate expense. You can also select multiple expenses, if necessary, and once finished, click the **Save** button to confirm your selections.

**Adding Hard Expenses**

To include a hard expense, click on the **Add Hard Expense** button. First, choose the bank you used for the payment from the **Bank** drop-down menu. If you paid electronically, select the specific bank account; if you paid in cash, select **Cash**. Enter the total amount spent in the **Amount** box and select the payment method from the **Payment Method** dropdown. If the payment method generates a reference ID, enter this unique identifier in the **Reference ID** box, and specify the date of payment in the **Payment Date** field.

Next, navigate to the Split section to allocate the expense appropriately. You will see a Remaining Amount on the right side of the interface, which reflects the total amount you entered previously. To accurately record the expense, you need to allocate it until the remaining amount becomes zero. Click the **Add** dropdown in the Split section and, if the specific expense hasn't been recorded before, select **New Expense**. Follow the same process outlined for soft expenses to input the necessary details. If a similar expense already exists in your records, choose **Existing Expenses** from the dropdown and select the required expense(s). As you add each item, the corresponding amount will be deducted from the remaining amount in the Split section. The expense can only be saved once the remaining amount is reduced to zero, ensuring that all expenses are properly allocated.

**Note:** When you log an expense as a soft expense, it will appear in your regular expense reports. However, if you designate it as a hard expense, it won’t show up in standard expense reports. Instead, it will be listed under the Existing Hard Expenses section. This distinction helps maintain clarity between direct case-related expenses and broader, general expenses that may impact multiple cases.

**How do you track transactions for a matter?**

The Transaction tab provides a comprehensive overview of all financial activities related to this case. Within this tab, you can view a complete record of transactions, including payments made for expenses, payments received, and trust fund movements. Each transaction is displayed with key details such as the transaction date, type (e.g., payment or trust fund movement), payment method, and amount. This detailed breakdown allows you to easily track and review each financial entry associated with the case.

**How do you add and manage timesheets for a matter?**

The next tab is the **Timesheet/Flat Rate** tab, where you can view and manage all the timesheets you’ve created for a particular matter. This tab is essential for tracking the time spent on a case and ensuring accurate billing.

Within this tab, there are two key action buttons that you’ll use frequently.

To add a new timesheet for this matter, click on the **Add Timesheet** button located at the top left. After clicking this button, you’ll be prompted to enter the time duration using the **Duration** panel. On the right side of the Duration panel, there is a button designed to help you track the actual time spent on a task. For example, if you have a meeting with a client related to this matter, you can activate this button at the start of the meeting to begin recording the time. This feature ensures that you accurately capture the time spent on various activities.

To the right of the Duration panel, you’ll see a **Rate** box, which displays your default hourly rate as set within the software. If needed, you can adjust this rate by modifying the number in the box.

The **Handler** dropdown menu shows the user who is currently creating the timesheet. If necessary, you can select a different user from this menu, assigning the timesheet to another individual.

The **Date** box automatically shows the date when the timesheet is being created, but you can modify this date as needed. Adjacent to the Date box is a toggle button labeled **Non-Billable**. By activating this toggle, you can add the timesheet to the matter without charging the client for the recorded time, which can be useful for internal tracking or pro bono work. Next to this toggle button is a box that calculates the amount of money you’re charging the client, based on your default rate and the time entered in the Duration panel.

If additional context or details are necessary, you can enter them in the **Description** box. At the bottom of the panel, there is another toggle button labeled **Tax**. When you turn this button on, the system will automatically calculate the applicable tax based on your default tax rate. If you choose to leave this button off, no tax will be applied to the timesheet.

Finally, at the very bottom, there’s a **Permissions** section that allows you to restrict access to this timesheet, ensuring that only authorized users can view it. The permissions functionality works the same way as previously explained, providing control over who can access specific timesheet information within your system.

Once you have done this, click on the **Save** button on the top right side to save the timesheet.

**How do you assign and manage flat rates for a matter?**

The next feature is the **Flat Rate** button, which allows you to assign a flat rate to the matter at hand. When you click this button, a panel will open, providing options to configure the flat rate according to your needs.

Within the panel, you’ll first see the **Amount** box, which displays your default flat rate. You can modify this amount by adjusting the value in the box to match the specific requirements of the matter. In the Handler dropdown menu, select the user responsible for managing this flat rate. Confirm the relevant matter in the Matter box to ensure the rate is correctly assigned to the appropriate case.

Next, set the date for creating the flat rate using the **Date** box. You’ll also notice a **Non-Billable** toggle button. If you wish to apply this flat rate without charging the client, toggle this option on. Otherwise, leave it off to charge the client based on this rate.

In the **Description** box, you can add any additional details or context related to the flat rate. Similar to the timesheet feature, there is a **Tax** toggle button that allows you to decide whether to apply the default tax rate to this flat rate. Toggle it on if taxes should be included, or leave it off if no taxes will be applied.

Finally, adjust the permission settings to control which users have access to this flat rate entry. Once you’ve completed all the necessary fields and configurations, click the **Save** button at the top to finalize and apply the flat rate to the matter.

**How do you view and manage the timeline of a matter?**

The next section you will encounter is the **Timeline** tab, which provides a comprehensive and detailed record of all changes and actions related to a specific matter. This tab offers a chronological log of every activity that has taken place, ensuring transparency and a clear history of modifications within the matter's detail panel.

In the Timeline tab, you will find detailed information for each recorded action. This includes the specific type of action performed—whether it's an update, an edit, or the addition of new information—the exact date and time the action occurred, and the user responsible for performing it. This breakdown ensures you can easily track who made which changes and when they happened.

**Note:** The timeline is presented in descending order, meaning the most recent activity is listed at the top, and the earliest actions, such as the creation of the matter, are at the bottom. This organization allows you to quickly see the latest updates and also review the full history of the matter from its inception.

At the top right corner of the matter detail panel, you will see five key action buttons that allow you to efficiently manage your matters. The first button on the far right is the **Save** button, which is essential for saving any changes you make across the different tabs within the matter. After applying updates, click this button to ensure all modifications are stored.

Next to it is the **New** button, which provides a quick way to create a completely new matter directly from this panel. This feature saves you time by allowing you to start new matters without leaving the current screen.

**How do you use the accounting settings for a matter?**

The third button is the **Accounting Settings** button. By clicking this button, you can modify the default accounts assigned for specific financial transactions, as configured in the **Chart of Accounts** settings. This functionality offers flexibility in managing the financial elements of each matter, allowing you to designate which accounts will be used for important transactions such as billing, trust funds, and expense tracking. By ensuring that the correct default accounts are selected for each matter, you maintain consistency in financial reporting and streamline the accounting process. This helps ensure that all financial activities are properly categorized and managed according to your business requirements.

Once you click the **Accounting Settings** button, you will be presented with options to choose the accounts for **Legal Fee Income** and **Trust Transactions** from their respective drop-down menus. select the appropriate accounts based on your accounting needs. After making your selections, remember to click the **Save** button located at the top right corner to apply the changes. This ensures that the selected accounts will be used for all future financial transactions related to this matter, maintaining an organized and efficient accounting workflow.

Following that, you will find the **Permission** button. This button allows you to adjust who can view or access this matter after it has been created. It functions similarly to the permission settings explained earlier, giving you control over the visibility and accessibility of the matter.

Lastly, the **Trash** button is available for permanently deleting the matter from the system. If you decide a matter is no longer needed, this button allows you to remove it entirely.