THE SMART WAY TO RUN YOUR SMALL PRACTICE

SILQ Solicitor Learner Guides

Manual 2 – Getting started with SILQ Solicitor

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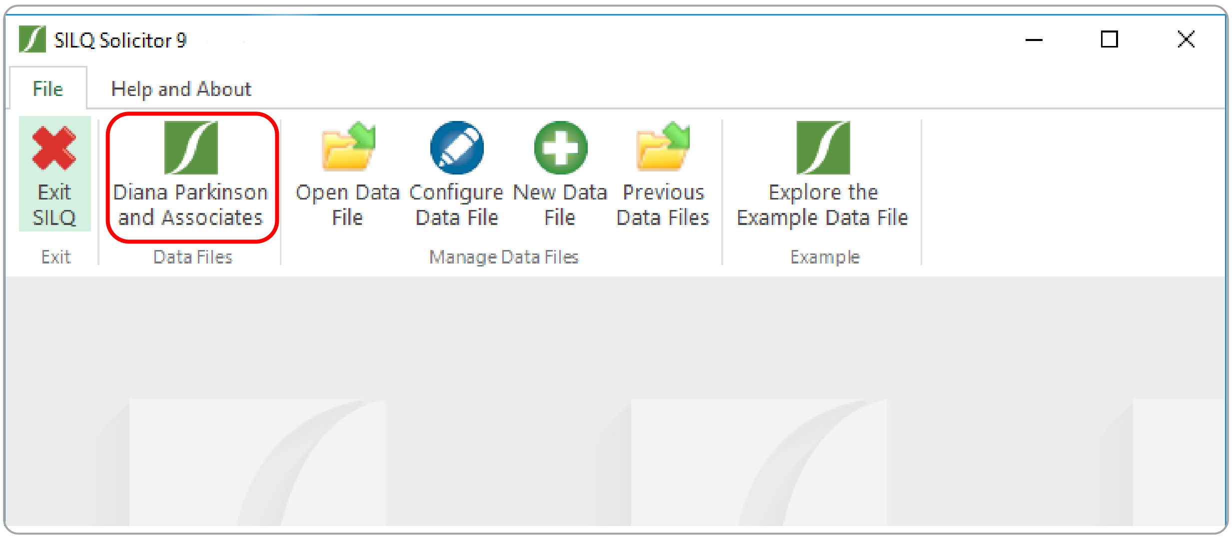
1. Opening your Data File

Overview
• Your Data File contains everything you do in SILQ. You will only need one Data File for the entire solicitor firm, and then SILQ will automatically sort and save all subsequent work you do in a logical and easy to find manner. Let's explore the Data File option now. • **NB: If you have not set up your data file, please refer to the Customising SILQ user guide which will step you through how to set up your data file.**

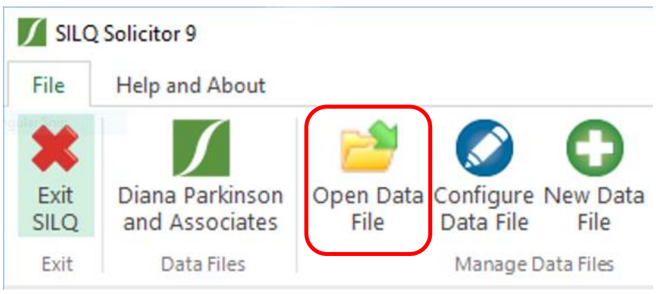


When you open the SILQ application, The Welcome to SILQ window will be the first screen you see. If you only have one Data File you SILQ will login automatically.

If you have more than one Data File you can choose which one to open. The name of your data file depends on what you called it when you set it up initially. In the example above it is Diana Parkinson and Associates. SILQ will then open up.

If your Data File is not on the list click on **Open your Data File** which can be seen in the screen shot below, you will need to locate the data file on your hard drive or server. To do this:

- Click on **Open data File not on the list**
- Locate the Data File on your hard drive or server and select it
- Click on Open and it will open in SILQ



2. Navigating SILQ

Overview
• In this section we will look at how to navigate around SILQ, which will include the Quick Access, the Data Tab, Display options, the Navigation Toolbar and the main window.

2.1 Quick Access

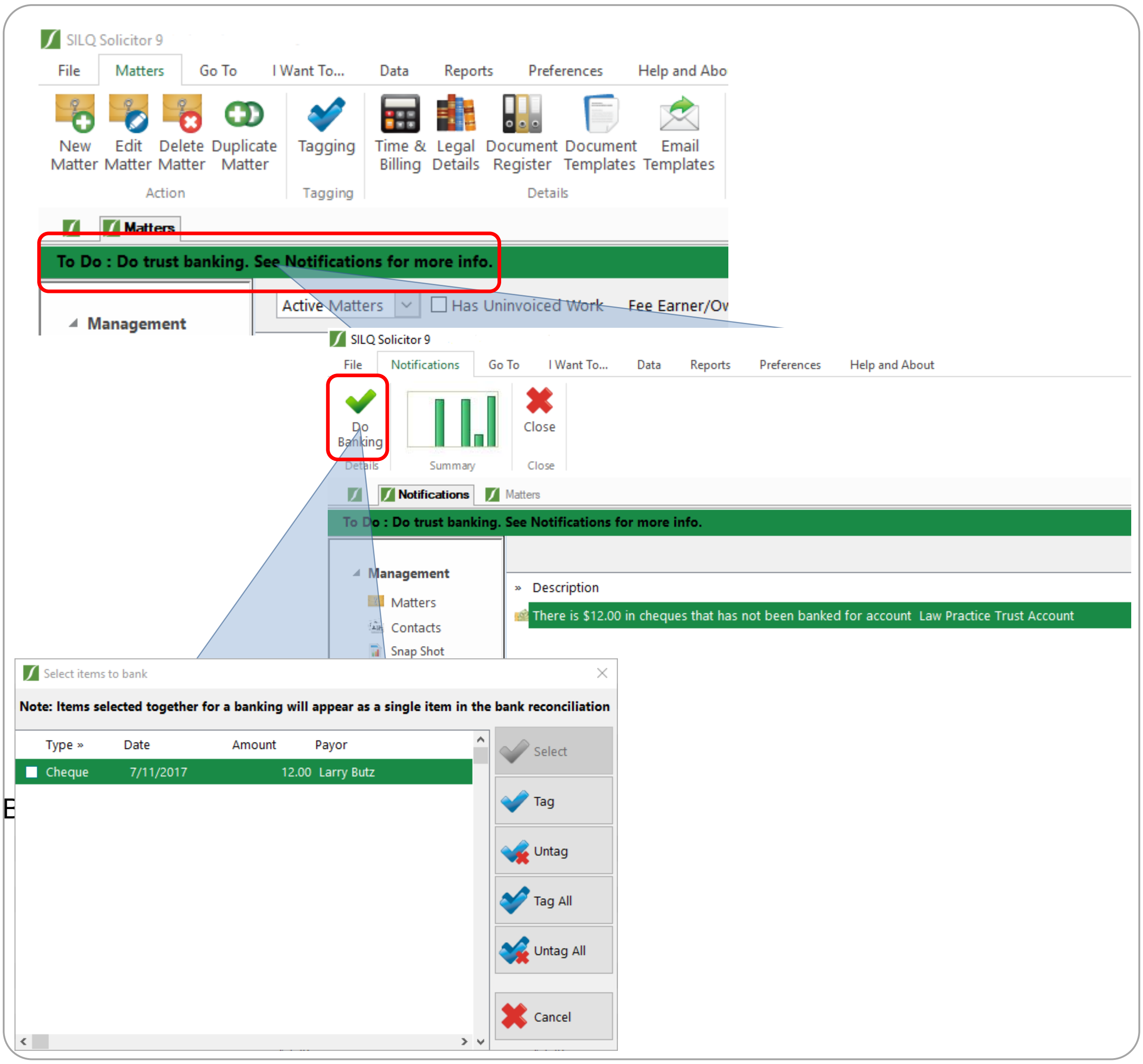
On every main window in SILQ on the left of the screen is the Quick Access. When you click on a button in the Quick Access, you will be taken to the screen that relates to that section. For example, if you click on the Contacts button, you will be taken to the Contacts screen.

A description of each button in the Navigation Tool Bar can be found in the table below:

Matters	The matter window allows you to easily see all of your matters in one place. Also it allows easy access to any of the related areas such as Time and Billing, Estimates, Authorities, Chronologies etc
Contacts	The Contacts window is where you can maintain the details of any of the Contacts that you have dealings with.
Snap Shot	The snap shot is a window-based report, that allows you to see a basic summary of the financial transactions that have occurred of a specified period, summarised by week, month, or quarter.
Time Entries	The Time Entries window allows you to enter time entries for any matter. It also allows you to see all the work that you have done over a specified period of time.
Invoices	The invoice window allows you to easily see all of your invoices for all matters in one place. By default it will show only the outstanding invoices.
Receive Money	The Receive Money window is for tracking all of the money that you receive for invoices as well as other sorts of income such as Interest and Dividends.
Spend Money	The Spend Money window is for tracking all of the expenses you incur in your business. As well it allows you to enter other sorts of payments that may not be an expense. Eg Transfers and Tax payments.
Diary	SILQ supports all the normal features of a diary including recurring appointments as well as reminders with the ability to snooze and dismiss the reminders.
Tasks	The Tasks window allows you to manage all the tasks for a matter, as well as any File Notes for that matter. SILQ can remind you when a task is due so that you don't forget it.
Searching	The Searching window gives you the opportunity to perform fast and accurate online Searches, Property Enquiries, Settlements, Stamping & Lodging, from start to finish using the InfoTrack service.

Safe Custody	SILQ Solicitor gives you the option to record and store information about non-financial records and documents that need to be kept on file and referred to. The Safe Custody feature allows you to view and edit records and name the places where the items are kept.
Document Register	The Document Register allows you to completely manage all aspects of documents associated with any matter.
Authorities	The Authorities window is for maintaining a list of authorities for use as precedents in cases. They are arranged under topics and later can be easily attached to a Matter to produce an Authority document.
Reconcile Practice	For Office Bank accounts only, you will be able to reconcile the accounts.
Banking	For Office Bank accounts only, you will be able to generate a banking slip for your general office account
Trust Money	The trust window is for entering trust and controlled money transactions.
Trust End of Month	The Trust End of Month window is for closing trust month end and running the End of Month reports.
Reconcile Trust	The Reconcile Trust window is for reconciling Trust and Controlled Money accounts.
Trust Banking	The Trust Banking is to bank Cash and Cheque deposits in the Trust Account or Controlled Money accounts.

2.2 Notifications Bar



The notifications bar will display when you open and log into SILQ Solicitor when you haven't done certain things, such banking cheques, or not having completed your end of month. It's to alert and notify you that these things need to be actioned in SILQ and they will all appear in this one list.

The benefit of the notifications bar is that it discreetly alerts you to a task that has not been performed but you can deal with it at your own leisure. If you don't want to action anything immediately, simply ignore the notifications bar.

To action something in the notification bar, click on it and then click on the button at the top left of the window to action it. In the example above, there are $12 dollars in Trust Banking that needs to be completed. By clicking on Do Banking SILQ takes us to the Trust Banking window.

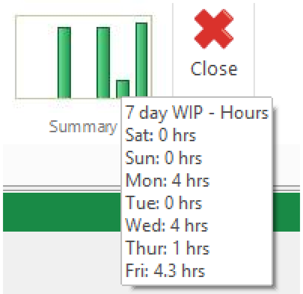
2.3 Dashboards

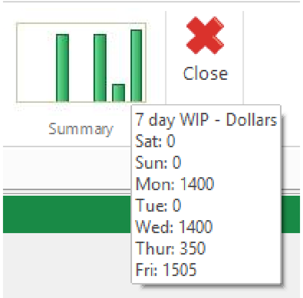
On the far right-hand side of the Navigation Tool Bar you can display a series of 2 dashboards. Also known as 7 day graphs.

This can be customised in the Preferences on the Navigation Toolbar.

The first summary is the 7-Day WIP Graph by hours. The second summary is the 7-Day Hours Graph by Dollars. What these 2 graphs display are the total amount of time entries you have entered into SILQ for the past 7 days, both in terms of hours and dollars.

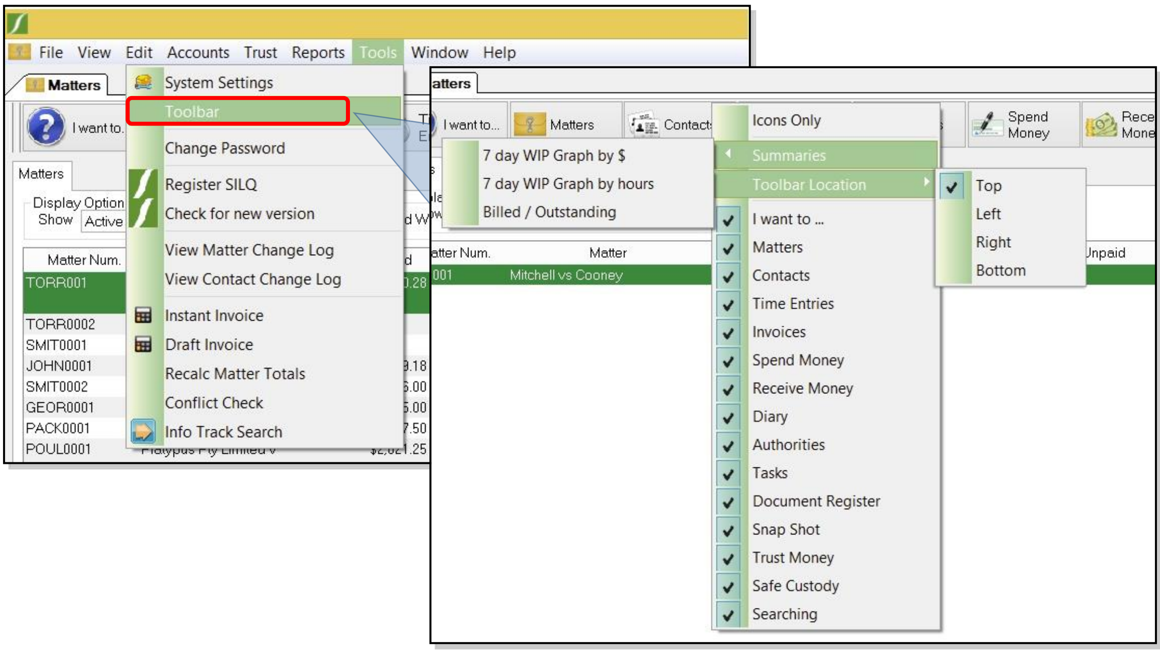
If you hover your mouse over any of the bars in the graphs, a pop up message will appear showing you the WIP value that was entered in the last week. The screen shot below on the left shows the value in dollars on Friday, while the screen shot on the bottom right displays the same amount in hours.





These graphs are very useful, because they can give you an indication if you missed entering any time entries into SILQ on a particular day of the week. In the example above, on Tuesday there is no bar in the graph, which can act like an alert to indicate you may have forgotten to put in your time entries on that day.

2.4 Customising the Navigation Toolbar

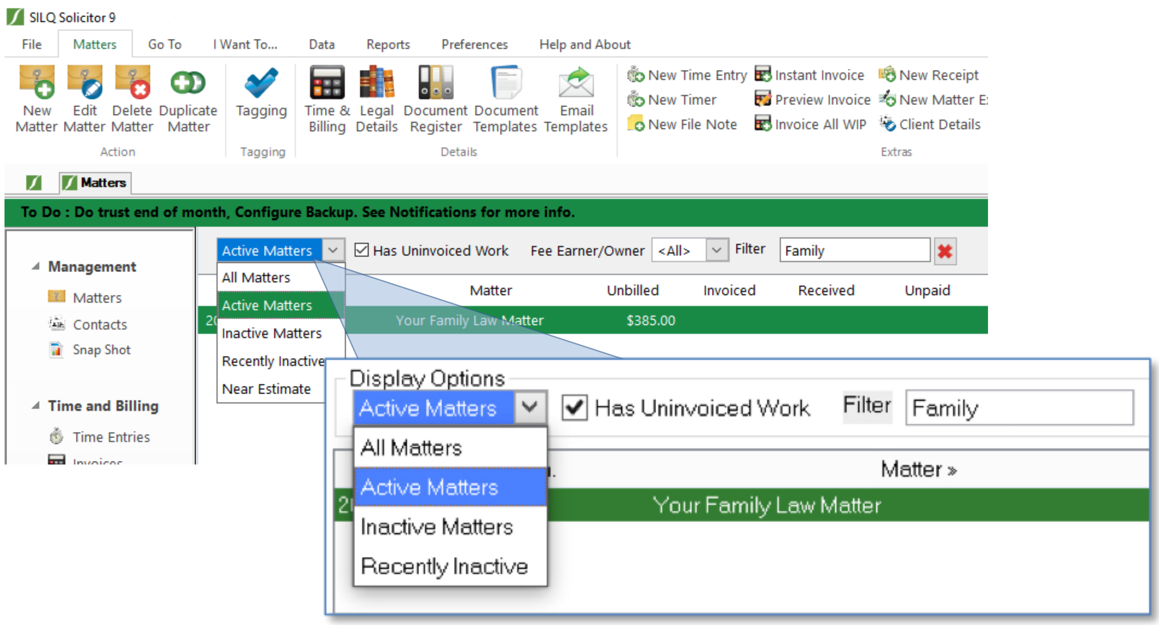


You can customise the Navigation Toolbar in 3 ways:

- You can choose to display the buttons just as icons to save space along the top Navigation Toolbar.
- You can determine which buttons you would like to have displayed. So for example if you don't want to use the Diary feature in SILQ, you can hide that button.
- You can change the toolbar location. For example if you don't want it displayed at the top of the screen, you can have it either on the left, right or bottom of the screen depending on what you choose.

To customise the toolbar, click on the **Tools** menu and then select **Toolbar** from the drop down menu. You will then have access to selecting whether you want to display the buttons as icons only, which summaries you would like to display, the location of the Navigation toolbar and which buttons you would like to display.

2.5 Display Options



On the top left-hand side of every window in SILQ, no matter which section you are in there are **Display Options**.

This is where you can quickly specify what data to display for the current active window. It has the most commonly used filtering options available for the window you are in.

Using the Matters Screen as an example;

Show Menu

In the **Display Options** section there is a show drop down menu which will allow you to quickly view All Matters, Active Matters, Inactive Matters or Recently Inactive Matters simply by selecting the option in the drop down menu.

Only Matters with Uninvoiced Work

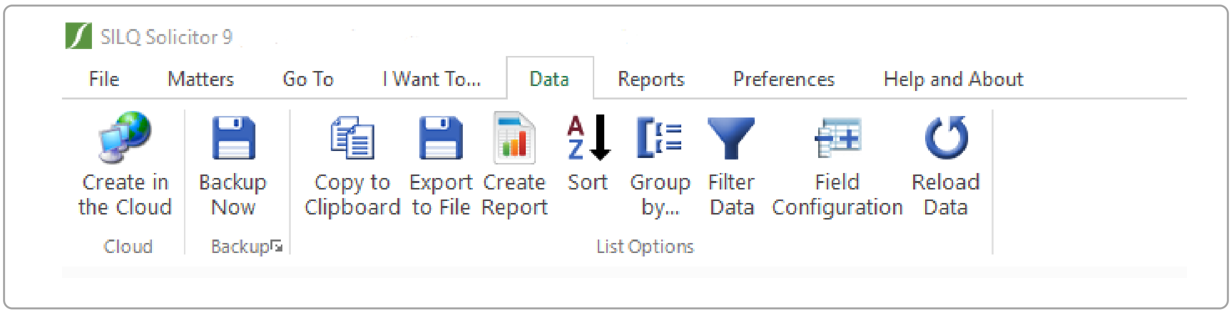
To view only matters with uninvoiced work, you can place a tick in the tick box

Filter

You can type search criteria into this field and it will restrict what records are shown in the window based on the search criteria.

2.6 Data Tab – Advanced Functions

The Data Tab has a series of small buttons located on the top right-hand side of every window in SILQ. These buttons allow you perform advanced functions quickly and easily.

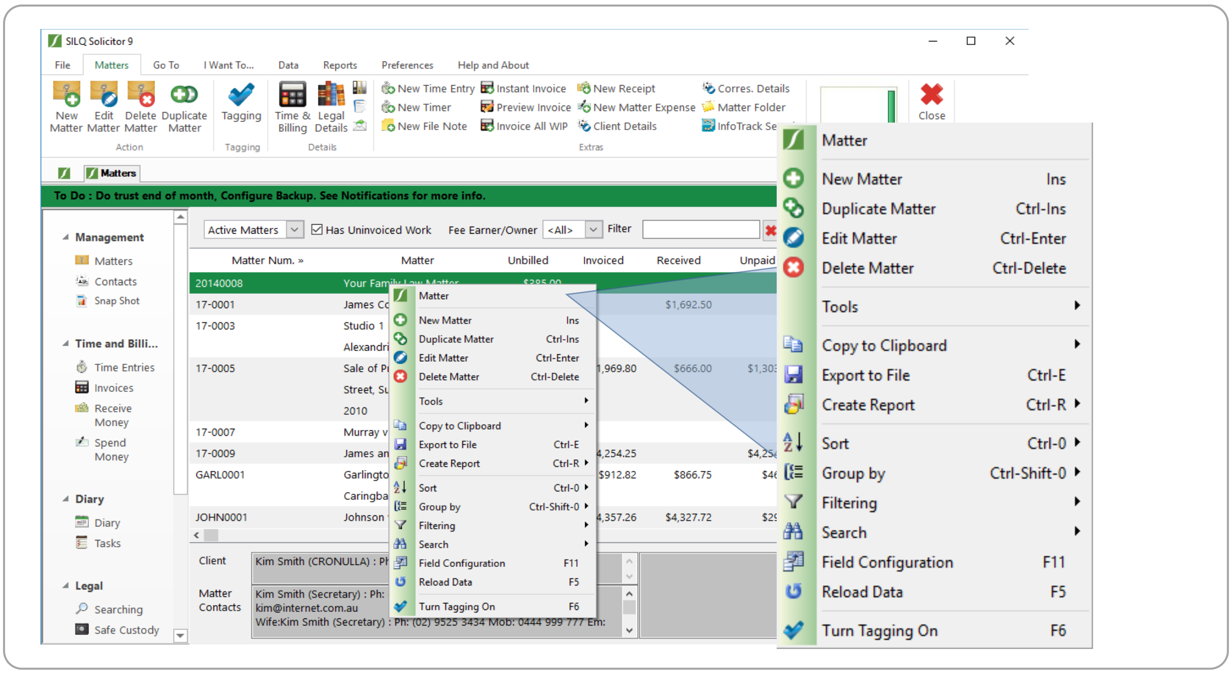


Create in the Cloud	**Create in the Cloud**: This button will create a new record ready for editing, but will set all fields to be the same as the currently selected record. This allows you to quickly create a similar record. Eg when entering recurring expenses. This button is not available on the Matters window.	Backup Now	**Backup Now**: This button will perform an immediate backup using your backup settings. Note: Backup settings is configured in File > System Settings > Backup
Copy to Clipboard	**Copy to Clipboard:** This button will format the data of the window into tab separated values and then put on the clipboard ready for pasting into other applications such as Microsoft Excel.	Export to File	**Export to File**: This button will export the data of the current window into a text file formatted as per the selections made. This can then be imported into other applications such as Microsoft Excel.
Create Report	**Create Report:** This button allows you to create a report out of almost any window in SILQ in either portrait or landscape orientation. Once selected you will be given the option to create the report 'As is' or 'Shrink' it. 'As is' means the data is wider than the report can display, so some data will be cut off. Choosing 'Shrink' will fit the data to the page.	Sort	**Sort:** This button allows you to sort a list of data in any of the available columns.
Group by...	**Group by**: This button allows you to group all of the records on the window by the selected field.	Filter Data	**Filter Data**: This button allows you to restrict what records are shown on a window by selecting particular criteria. There is no limit to the number of criteria that you can specify.
Field Configuration	**Field Configuration:** This button allows you to configure the fields that are visible in a particular window including what order they are displayed in as well as how wide a field is along with other settings. Refer to page 14 and 15 to see how this works.	Reload Data	**Reload Data:** This button refreshes the content in the active window.

These functions can also be accessed byright mouse clicking in the current window and with short cut hot keys.

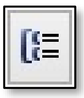
Right Mouse Clicking

If you right mouse click anywhere in the current active window, a contextual menu will appear where you will have access to the same functions that are available in the Mini Buttons.



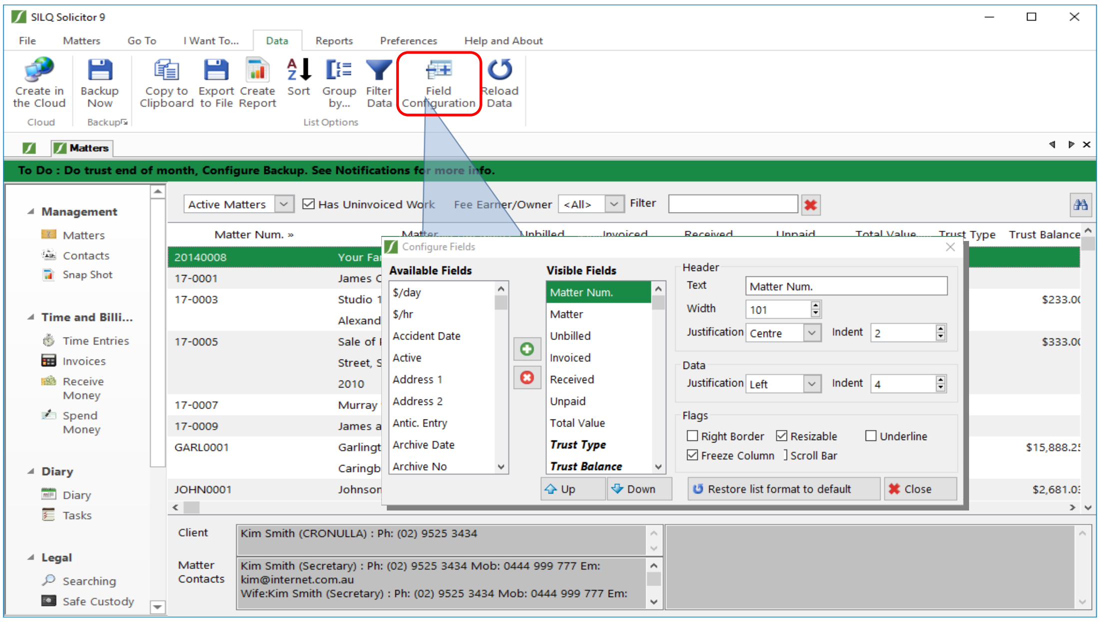
Shortcut Hot Keys

All the mini button functions can be accessed via short cut hot keys. Below is a list of all the hot keys that are used to access the advanced functions from any window.

	**Duplicate Record**: **Cnt+Ins** Hold down the Control and Insert keys
	**Group by: Cnt+Shift+0** Hold down the Control and Shift and 0 keys will bring up a contextual menu allowing you to group all of the records on the window by the selected field.
	**Copy to Clipboard:Cnt+C** Hold down the Control and C keys
	**Filter Data: F7** Pressing the F7 key will bring up the advanced filter.
	**Export to File**: **Cnt+E** Hold down the Control and E keys
Search Field:  Click directly into the search field and type your search query and press the Enter key to perform your search. To continue searching with the phrase or word entered press on the F3 key.	

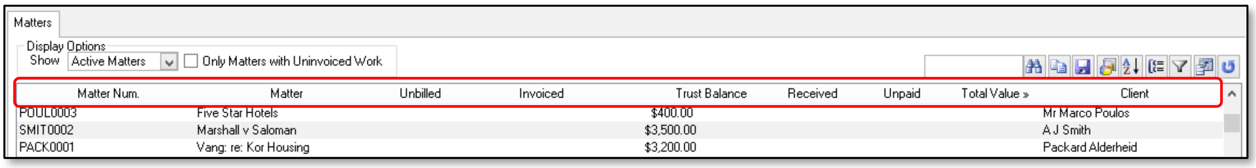
	**Window Report:** **Cnt+P** Hold down the Control and P keys for a portrait report **Cnt+L** Hold down the Control and L keys for a landscape report		
	**Field Configuration: F11** Pressing the F1 key will bring up the field configuration window. Refer to page 14 and 15 to see how this works.		
	**Sorting a window:** **Cnt+O** Holding down the Control and O keys will bring up a contextual menu allowing you to select which column you would like to sort.		**Reload Data:** **F5** Pressing the F5 key will refresh the content in the active window.

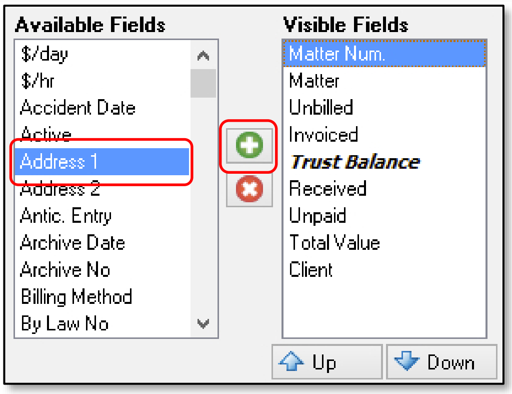
Field Configuration



Clicking on the Field Configuration button in any window will open up the **Configure Fields** dialogue box, which will allow you to customise the fields that appear in the active window you are viewing.

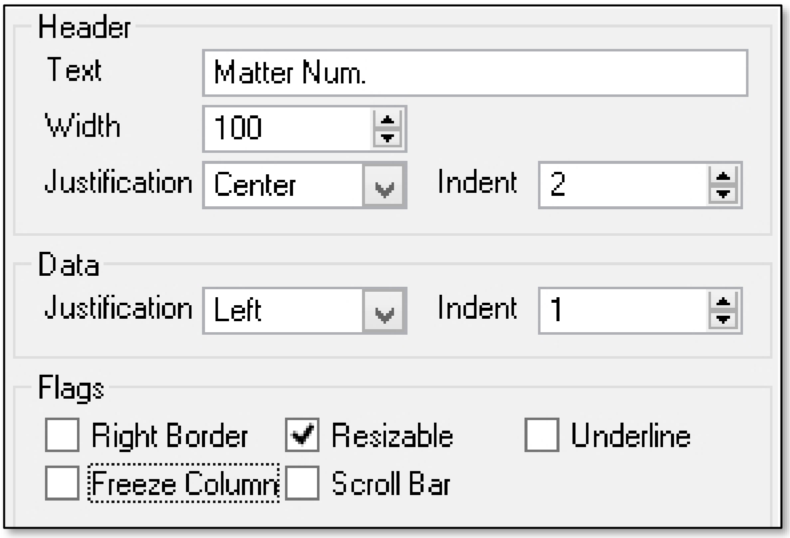
In the example above we are on the matters window, and the fields that are visible run across the top of the main window. Refer to the screen shot below.





Referring to the Configure Fields dialogue box to the right, in the left hand column are the **Available Fields** that you can add to the active window. The column to the right is the **Visible Fields**. These are the fields that are currently visible on the active window.

If you would like to add additional fields to the active window, click on a field from the **Available Fields** column and then click on the green '**+**' button to add it to the **Visible Fields** column. Automatically this new field will appear along the top of the active window. If you want to move the order of the fields either left or right, use the **Up** and **Down** arrows at the bottom of the Visible Fields column and dynamically the field will change position as you click.



To the right-hand side of the Visible Fields column are some extra options for you to customise how the data on the active window is displayed.

You can customise each individual field column with it's own formatting.

There are 3 sections, **Header**, **Data** and **Flags** that can be customised.

To customise a particular field and column, first click on the field in the visible fields column. In the example above the Matter Num. field has been selected. This can be seen in the Header section in the text box.

Within the **Header** area, you can now customise the width of just the Matter Num. column as well as its justification of the header as well as its indentation.

In the **Data** section, you can customise the justification of the data in that column as well as it's indentation.

In the **Flags** section there are a few other options, which allow you to customise a column even further:

Right Border: this will place a black line down the right-hand side of the chosen column.

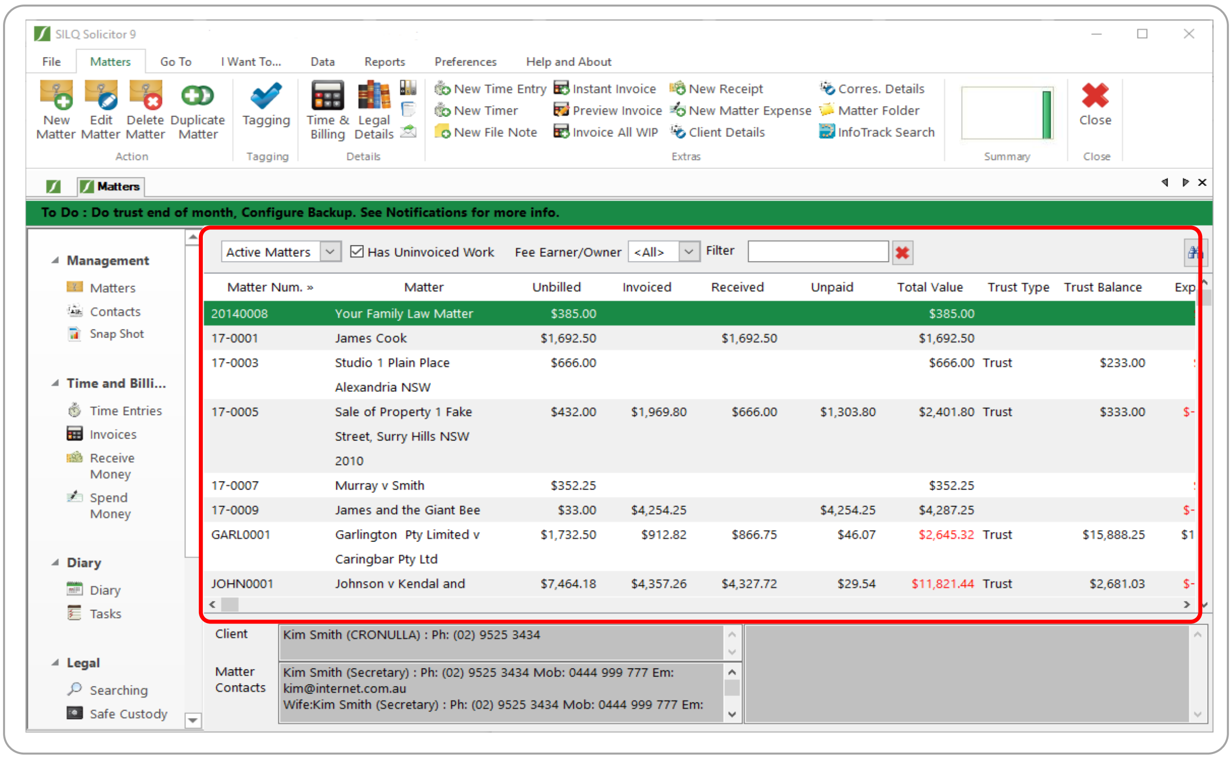
Resizable: Allows you to manually drag the column to adjust it's size.

Underline: Will place a underline under each record in the chosen column

Freeze Column: This is a handy feature to turn on if you would a column not to move off the screen if you need to scroll across to view more columns.

Scroll Bar: This places a scroll bar at the bottom of each column. So if the information in a column is larger than the column itself, you can use a scroll bar to view the information.

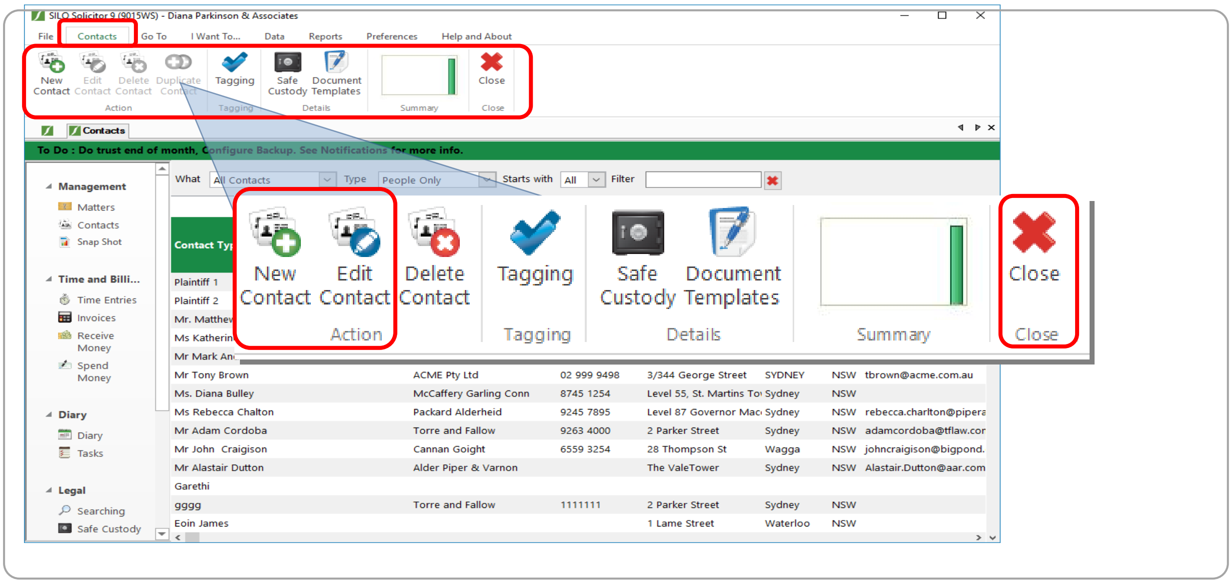
2.7 Main Window



Below the Display options and the 10 Mini Buttons is the main window in SILQ.

The main window will display all the data for the current section you are in. In the example above the section that is displayed is the Matters Window and what is displayed in the main window are all the Active matters that have been entered into SILQ.

2.8 Main Menu



On every screen within SILQ, no matter which section you are in, there will be a tool bar displayed on the second tab on top of the screen. This toolbar is dynamically generated, meaning it changes depending on what window you are in, however it contains the most essential functions for that particular window.

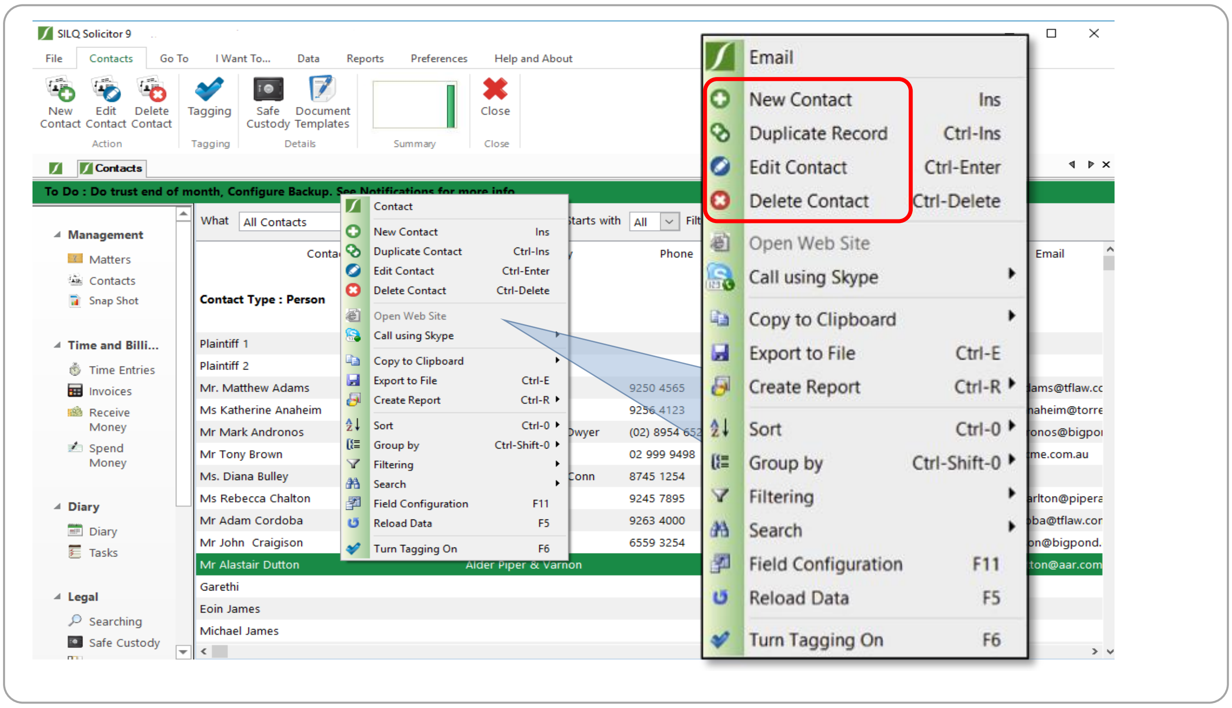
The Contacts Screen is displayed in the above example, along with the top toolbar menu that corresponds to that particular window.

What is common on most of the top toolbar menus in most sections of SILQ, are the first 3 buttons. In the example above what you can see is '**New Contact**,' '**Edit Contact**' and '**Delete Contact**'. So you can think of these 3 buttons as Add, Edit and Delete.

These three options can also be accessed in another 3 ways, via the edit menu, right mouse clicking on a record in the current window and with short cut hot keys.

Right Mouse Clicking

If you right mouse click on a record in the current active window, a contextual menu will appear where you will have access to ‘**New**,’ ‘**Edit**’ and ‘**Delete**’.



Shortcut Hot Keys

The ‘**New Contact**,’ ‘**Edit Contact**’ and ‘**Delete Contact**’ can be accessed via short cut hot keys. Below is a list of the hot keys that are used to access these functions.

	**New** : **Ins** Press the Insert key
	**Edit: Ctrl+Enter** Hold down the Control and Enter keys
	**Delete: Ctrl+Delete** Hold down the Control and Delete keys

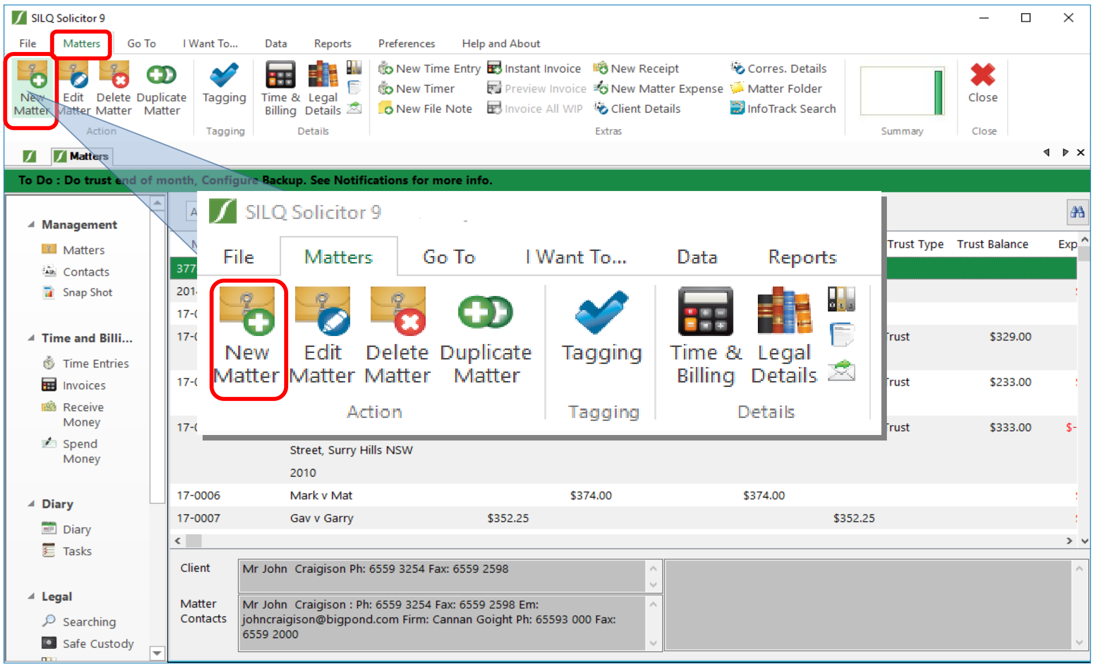
So in the case of the Contacts screen in the example on page 15, to Add a new contact you just click on the **New Contact** button. To edit an existing contact, you select that contact and then click on the **Edit Contact** button. To delete an existing contact you select that contact and then click on the **Delete Contact** button. If you remember this, no matter which section you are in when using SILQ, you will always be able to Add, Edit or Delete a record.

To close down any window that you have open in SILQ, there will be a ‘**Close**’ button located at the bottom of every right-hand side toolbar.

3. Matters

Overview
• Matters are the core element that almost all other information relates to in SILQ. All items such as Time Entries, Invoices and Receipts belong to a 'Matter', therefore a matter must be created for them before you can go and do other things. • If you remember that everything in SILQ is 'matter driven' (that is) linked to a matter, it will help you quickly and logically learn how to use the system. The matter window allows you to easily see all of your matters in one place. • This window also allows easy access to any related areas such as Time and Billing, Estimates, Authorities, Chronologies etc through the buttons on the Top Tool Bar menu.

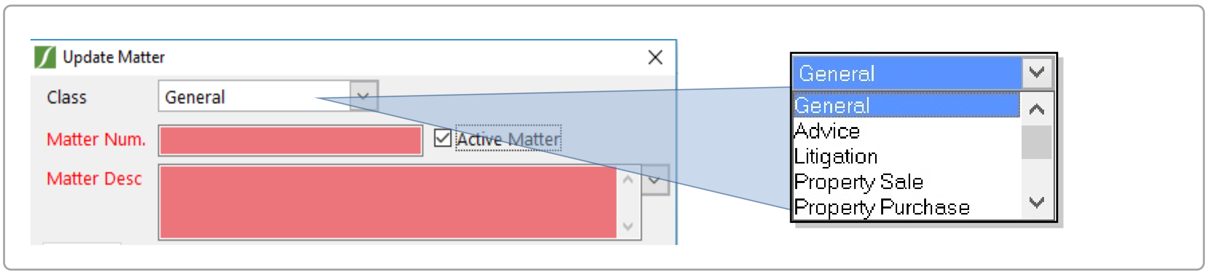
3.1 Creating a Matter



If you are not on the matters window, click on the **Matters** button on the left side of the Navigation Toolbar. This will bring you to the Matters window.

To start entering a new matter, click on **New Matter** in the Top Toolbar menu.

The **Update Matter** window will open up which will allow you to start entering the details of the new matter.



At the top of Update Matter window are various fields to start filling out.

You will notice that some fields are highlighted in red.

A **Red** field is a compulsory field, which must be completed before you can save your work. So in the above screen shot, both the **Matter Number** field and the **Matter Description** field are compulsory to fill out.

Let us explore these fields in more detail:

Matter Number: This is a Short name that is used for display purposes throughout SILQ but is not used when generating correspondence.

NB: The Matter Number may automatically be entered when you open the Update Matter window or it may not be as in the example above. What determines if a matter number is automatically assigned when you create a new matter is by the Matter Number Strategy that you have selected to use for your matters. Please refer to the Customising SILQ User Guide on page 29, to see how to choose a Matter Number strategy. A matter number will automatically be assigned when you create a new matter if you have chosen a sequential matter number strategy. In the example above, a matter number will automatically be assigned once you have selected a client in the **Client and Correspondence** tab. This is because the matter number strategy that has been chosen is to use the clients Surname and then a 4 digit number. So once a client has been chosen for this matter, the matter number will be generated.

Matter Desc: This is the formal name of the matter and will be used when generating correspondence such as letters and invoices.

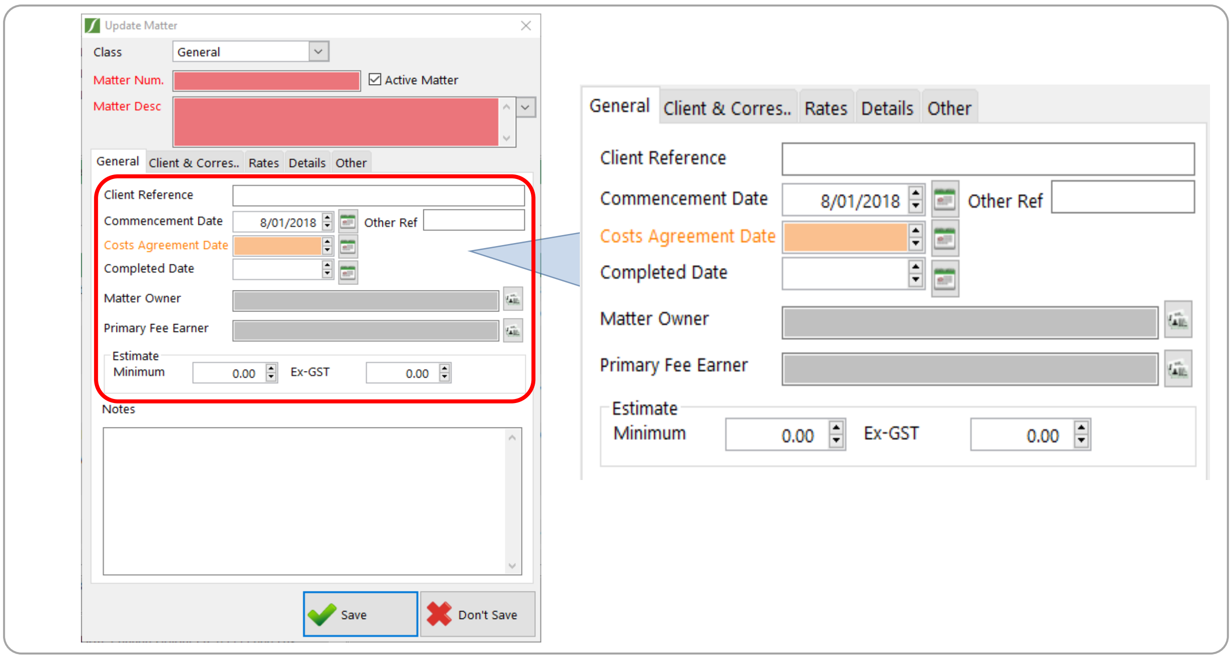
Class: This is a drop down list, which allows you to select the type of law this matter relates to. It is important to select the correct type of law for the matter, as it will display different fields in the Client and Correspondent tab as well as the Details Tab depending on the type of law selected.

Active Matter: A tick placed in this box indicates this matter is active. To make it inactive after the matter is complete, remove the tick.

3.2 Update Matters Tabs

When you fill out the Update Matters window there are several tabs, which need to be completed. They are General, Client and Correspondence and Rates. The Details and Other tabs are optional.

3.2a General Tab



An **Orange** field is a recommended field to complete. In the example above The **Costs Agreement Date** in the General Tab is the only recommended field to complete.

Client Reference: This is a reference you want to use for the matter and will come out on correspondence where appropriate. This helps facilitate communication with them.

Costs Agreement Date: This is when you sent the client a Costs Agreement. If this is filled in it will make the appropriate reference to it at the bottom of an invoice.

Matter Owner: This is the solicitor who is responsible for overseeing the matter, such as the owner or partner of the firm.

Primary Fee Earner: This is the solicitor who is doing the actual work on the matter.

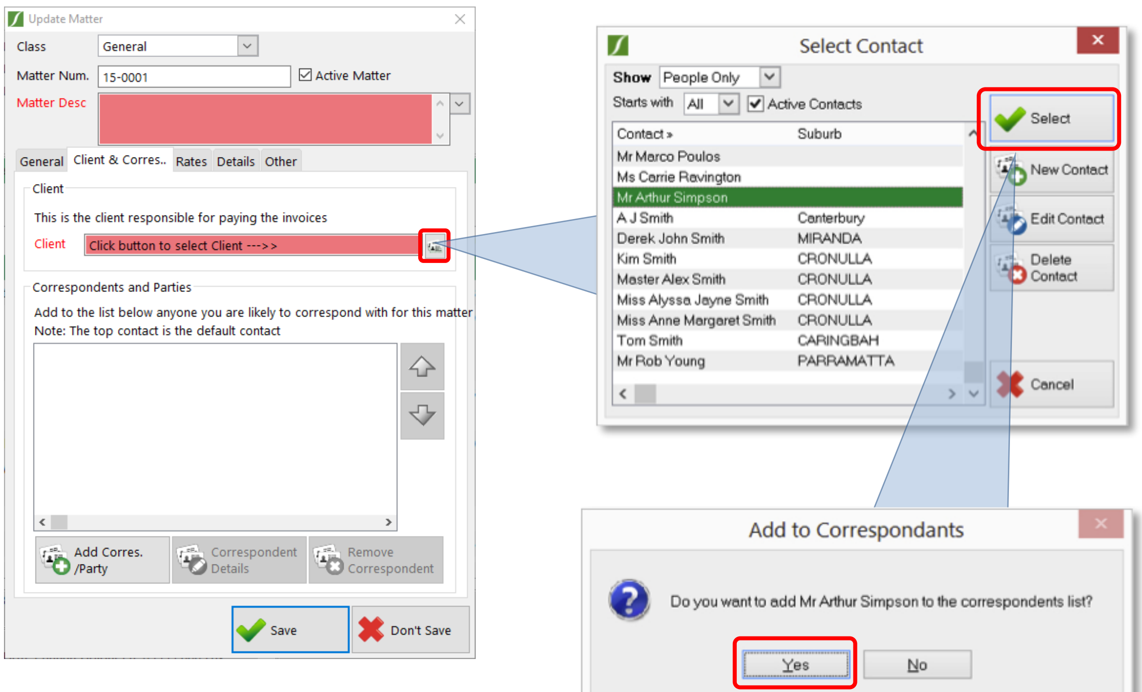
Estimate fields: They allow you to enter an estimate range for the matter. They are not required and you can also use the Estimate system to calculate these values.

3.3 Client and Correspondent Tab

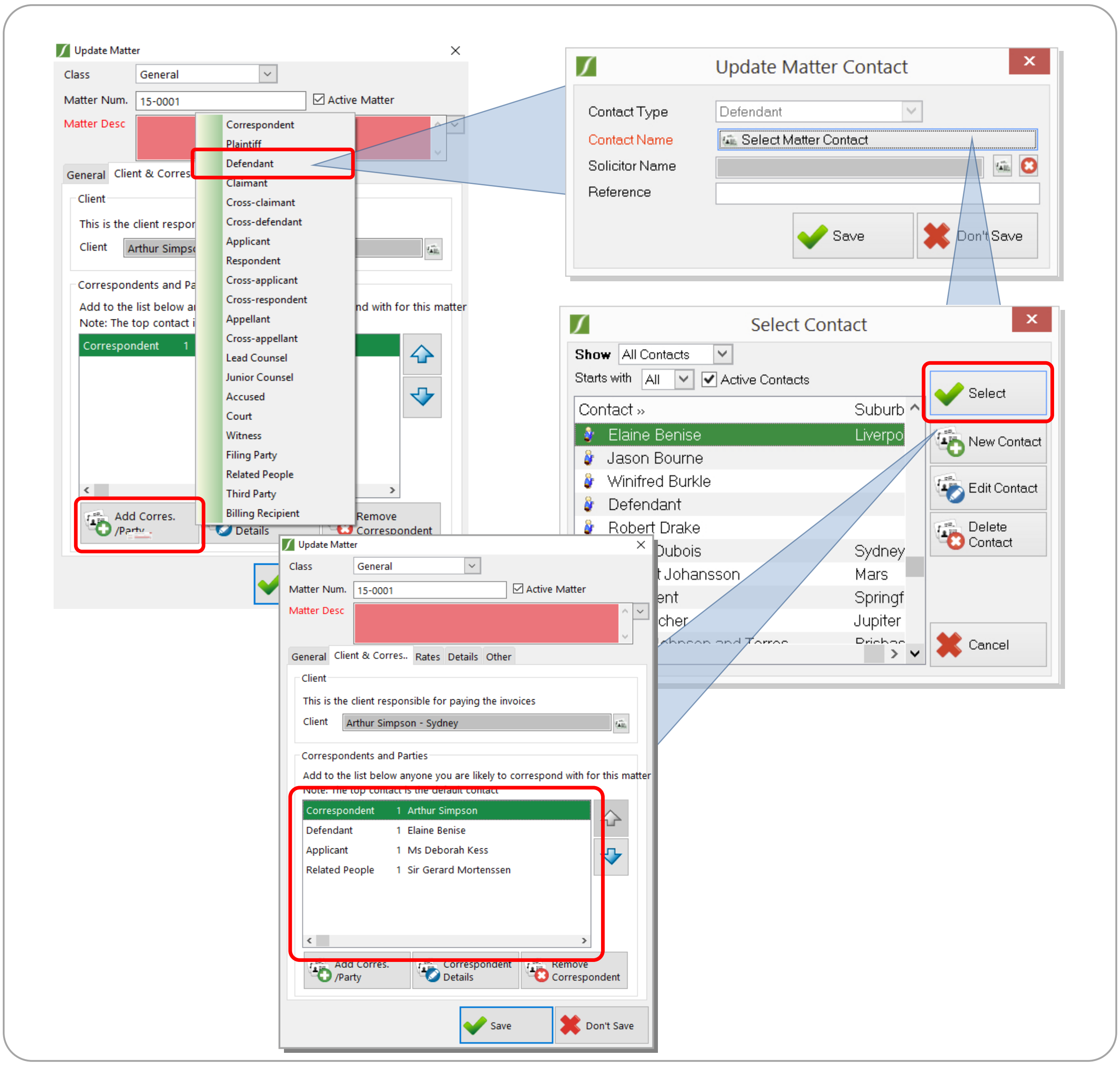
Overview
• This information is essential to help you manage every party involved in each matter from clients through to defendants, claimants and anyone else that you may need to contact. • You can put as much or as little information as you need about each contact. After you have entered them once, they are easy to retrieve and add others if necessary.

The **Client** is the company or person that is financially responsible for the matter. Click on the button to the right of the Client field and you will be presented with a list of contacts already in the system. Select the one you want to add to the matter and click on the Select button.

If the client you have selected is a person, then you will get a message saying do you want to add the chosen contact as a correspondent to the list. If so click on Yes. Correspondents are explained on the next page.



NB: If the client is not there then click on the New Contact button to create them. To see how to create contacts see section 4 in this manual, **Contacts**.



Correspondents are people related to the matter or have some other relationship with the matter such as vendors and banks etc, that you may send letters to. You can add as many people as necessary including people such as the solicitor/barrister on the other side. To add someone click on the **Add Correspondent/Party** button.

A menu will appear which will list all the party types. Select the party type from the list. Every party type except the Correspondent party type will open the Update Matter Contact window. Click on the **Select Matter Contact** button to open up the Select Contact window and choose the correspondent by clicking on the **Select** button. You also have the option to choose the Solicitor for the selected correspondent from the Update Matter Contact window.

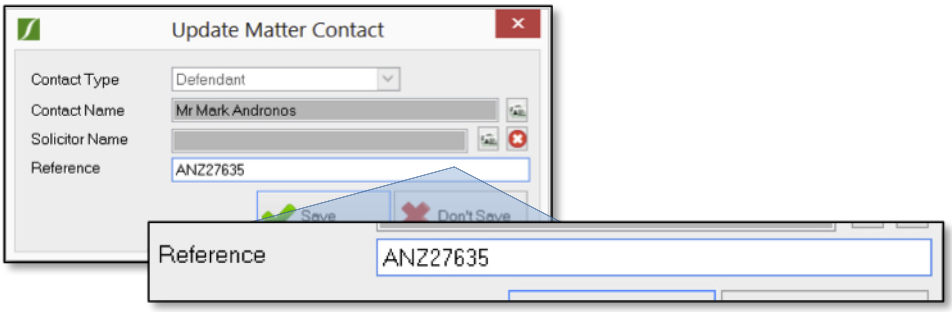
There is also a reference field where a reference number that is unique to that individual on that matter can be entered.

Once the contact has been selected click on the **Save** button. Repeat this process if you would like to add more than one party.

The correspondents and parties will display in a list in the client and correspondents tab.

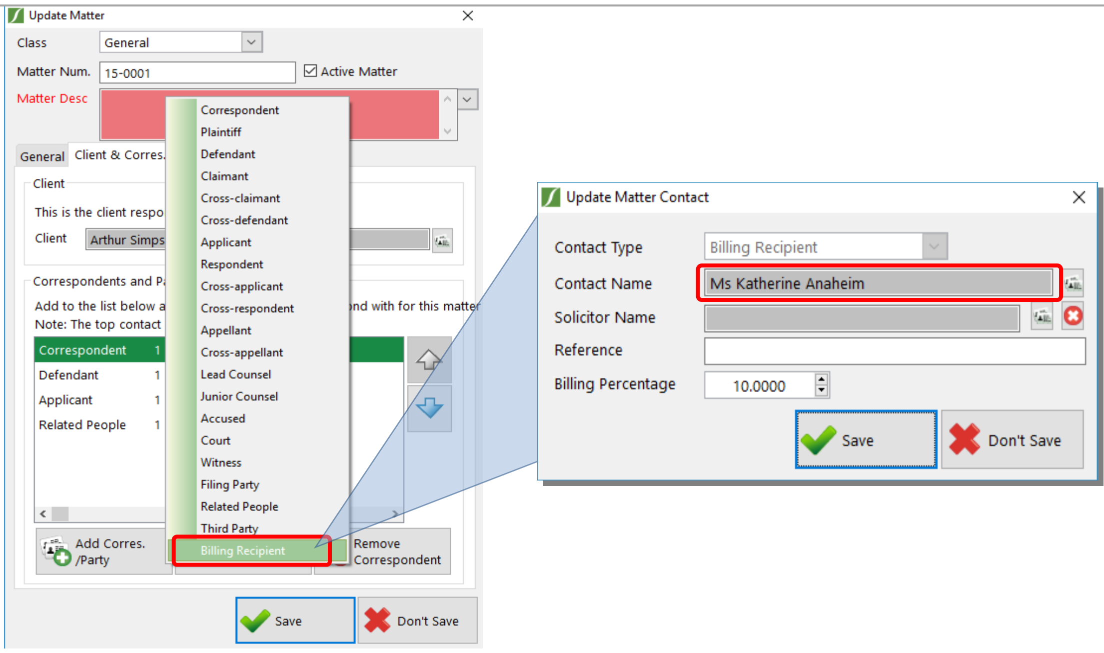
Note: If there is more than one correspondent for a matter, when you generate a letter, you will be prompted to select which of the correspondents you want the letter addressed to.

Reference Field



The Reference field in the Update Matter Contact window allows you to add a reference number that is unique to that particular individual on that matter.

Billing Recipient



If there are a number of people responsible for paying the invoice, they can be entered against the matter as a Partial Billing Recipient and then a percentage they are responsible for paying can be entered in the billing percentage field.

In the invoice template a series of template codes can be placed in the template to recognise partial billing recipients, and then when the invoice is generated and the matter contact is selected to address the invoice to, SILQ will recognise they are a partial billing recipient and the invoice will be generated based on the billing percentage that has been allocated to them.

An example of an invoice template with the Partial Billing codes inserted can be seen below. The partial billing codes are all displayed in red.

EXAMPLE LAW FIRM

100 George Street
Sydney 2000

<i:m-cfor><e:m-cfor> <i:f-bestpostaladdr>	Date: Reference: Invoice No:	<i:i-date:d:18> <i:m-short> <i:i-id>

TAX INVOICE

<i:m-mat>
<i:m-court> No <i:m-mno><e:m-court>
Your Ref: <i:m-ref><e:m-ref>

Summary of amount due:

Total fees	<i:sum-w-priceexdisc>
Total disbursements	<i:sum-d-price>
GST applied	<i:i-gst>
TOTAL PAYABLE (including GST)	**AUD <i:i-pay>**

<e:i-ispart>PARTIAL BILLING

You are responsible for <i:i-billpc> of this invoice. Therefore you need to pay the amount specified below: <e:i-ispart>

Total excluding GST**<e:i-ispart>**	**<i:i-parttotalex>**
GST included**<e:i-ispart>**	**<i:i-partgst>**
YOUR TOTAL PAYABLE (including GST) **<e:i-ispart>**	**AUD <i:i-partpay>**

<e:i-ispart>

EXAMPLE LAW FIRM

This invoice is issued in Australian dollars. Please make payment directly into our account:

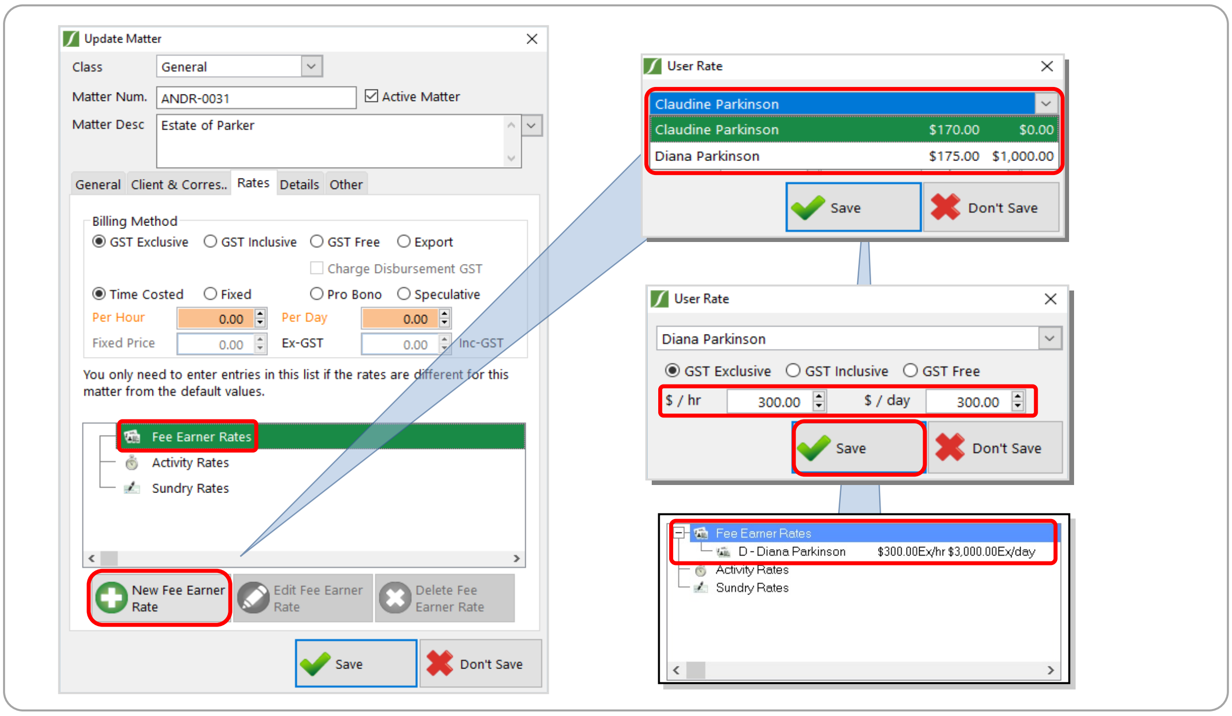
Account name:	EXAMPLE LAW FIRM
Bank:	Commonwealth Bank of Australia
Bank address:	Liverpool & Castlereagh Streets, Sydney, New South Wales, Australia
Bank Code:	062 016
Account No:	9999999
Swift Code	CTBZ43

Liability limited by a scheme approved under Professional Standards Legislation

3.4 Rates Tab

Overview
• When entering your Work in Progress, SILQ will use the default rates that have been specified for a given item. Eg the standard hourly rate. However if you have agreed with your client to charge a different amount for particular work that is only applicable to the current matter then this is where you can change it.

Changing the default hourly and daily User Rates



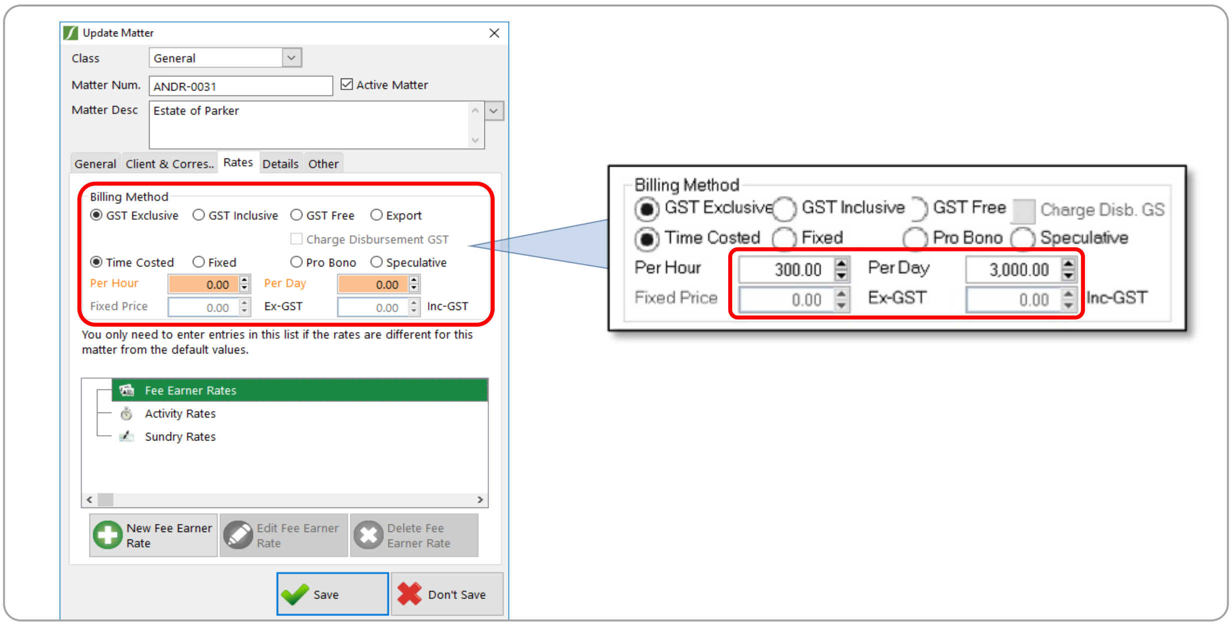
To change the fee earner rates when using **individual user fee earner rates**, referring to the screen shots above, click on Fee Earner Rates, and then click on the New Fee Earner Rate button.

A **User Rate** window will appear. Select the Fee earner from the drop down menu, and then type in the per hour and per day override rates.

Then click on **Save**.

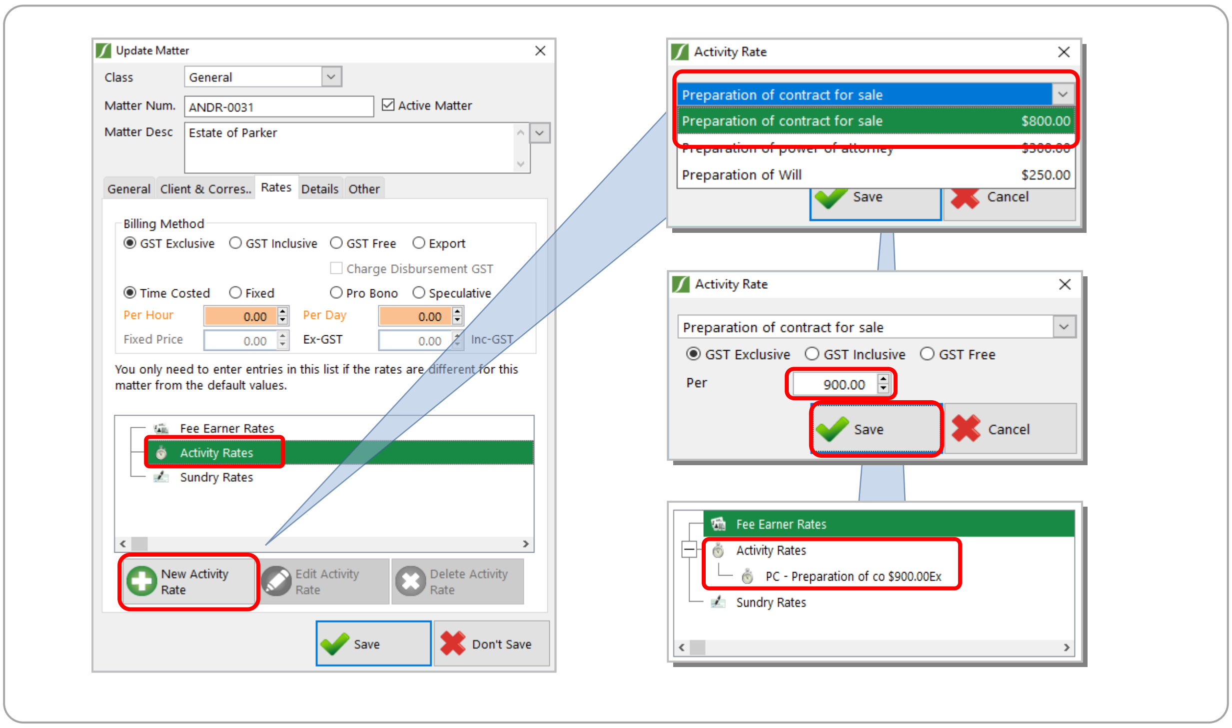
You will then see the fee earner listed with the new override rate.

Changing the default hourly and daily rates No Fee Earner Rate



To change the fee earner rates when **you have not set a fee earner rate**, referring to the screen shots above, all you need to do is type over the Per Hour and Per day default rate fields.

Changing the default rates for Activities and Sundries



NB: Before you can change your default rates for your Activities and Sundries, you will need to have added your Activity and Sundry items into SILQ. To see how to do this, refer to the Customising SILQ User Guide, page 20.

To change the default rates for both Activities and Sundry items, referring to the example in the screen shots above, click on Activity Rates, and then click on the New Activity Rate button.

An **Activity Rate** window will appear. Select the Activity from the drop down menu, and then type in the override rate.

Then click on **Save**.

You will then see the new override rate for that activity.

3.5 Details and Other Tab

Overview
• The details and Other Tabs allow you to enter additional information about the matter you are creating. You may not have all this information at hand when you first open the matter and set it up, however it would be useful to go back and enter this information into the matter as it comes to hand. It makes searching, grouping and other tasks a lot easier and quicker.

The **Details Tab** allows you to enter in extra information in relation to the matter you are creating. The fields in the Details Tab dynamically change depending on what Class of law you have selected for the matter, from the Class drop down menu at the top of the Update Matter window. (Refer to the screenshot on page 15).

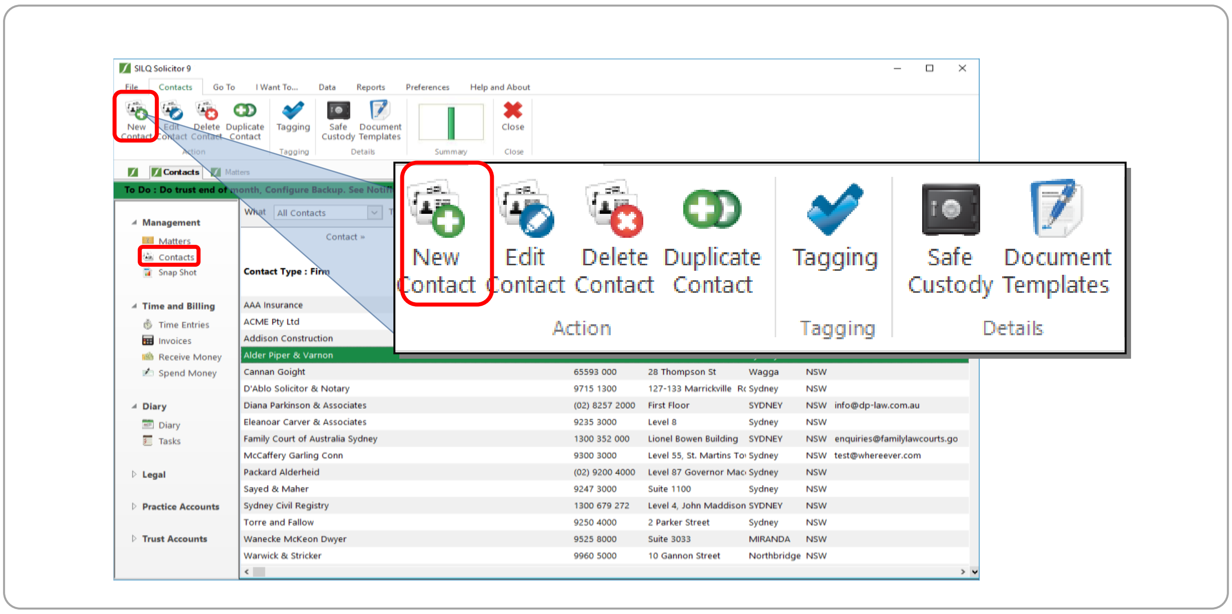
The **Other Tab** allows you to also enter additional information about the matter you are creating. The fields in this tab stay the same no matter which class of law you select.

To have a list to pick from in each of the drop down menus in the Other Tab, you first need to add them to the Lookups area in System Settings. Only then will they appear in each of the drop down menus. To see how to add data to each of the drop down menus, refer to the Customising SILQ User Guide, page 24.

4. Contacts

Overview
• Contacts are used throughout SILQ, and a matter must have a contact associated with it. The address details for contacts are used whenever a letter is generated for the matter. Therefore, it is good to fill in as much information about a contact as you have such as phone numbers, address details, emails etc, as SILQ can be used as a quick way to look up your clients details.

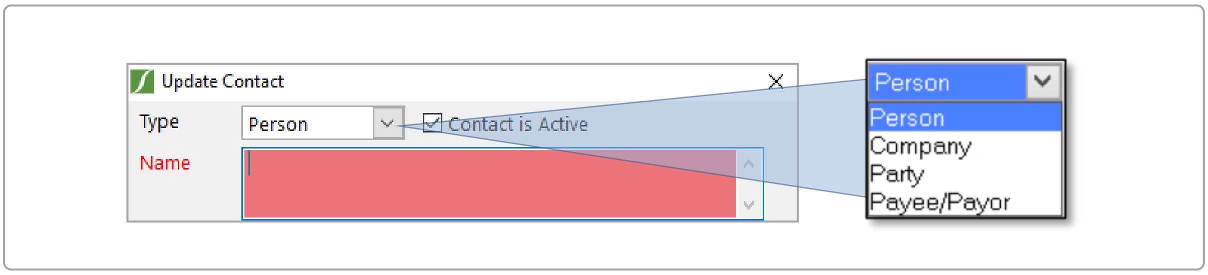
4.1 Adding a Contact



If you are not on the contacts window, click on the **Contacts** button on the left side of the Navigation Toolbar. This will bring you to the Contacts window.

To start entering a new Contact, click on **New Contact** in the top Toolbar menu.

The **Update Contact** window will open up which will allow you to start entering the details of the new contact.



At the top of Update Contact window, there are various fields to start filling out.

You will notice that one of the fields in the Update Contact window is Red.

A **Red** field is a compulsory field, which must be completed before you can save your work. So in the above screen shot, the **Name** field is compulsory to fill out.

Let us explore these fields in more detail:

Type:
This is the type of contact you want to create. From the drop down menu you can create 4 types of contacts:

- **Person:** An individual who can also be attached to a company and inherit its address
- **Company:** Other firms that person/s may be attached to
- **Party:** A person on the other side, such as the Defendants/Plaintiffs/etc
- **Payee/Payor:** They are contacts specifically for making the entry of Spend Money and Receive Money quicker, though Persons and Firms can be used as Payees and Payors as well.

Name: This is where you enter the name of the contact, which is compulsory

Contact is Active: To make the contact inactive, click on the tick box to remove the tick.

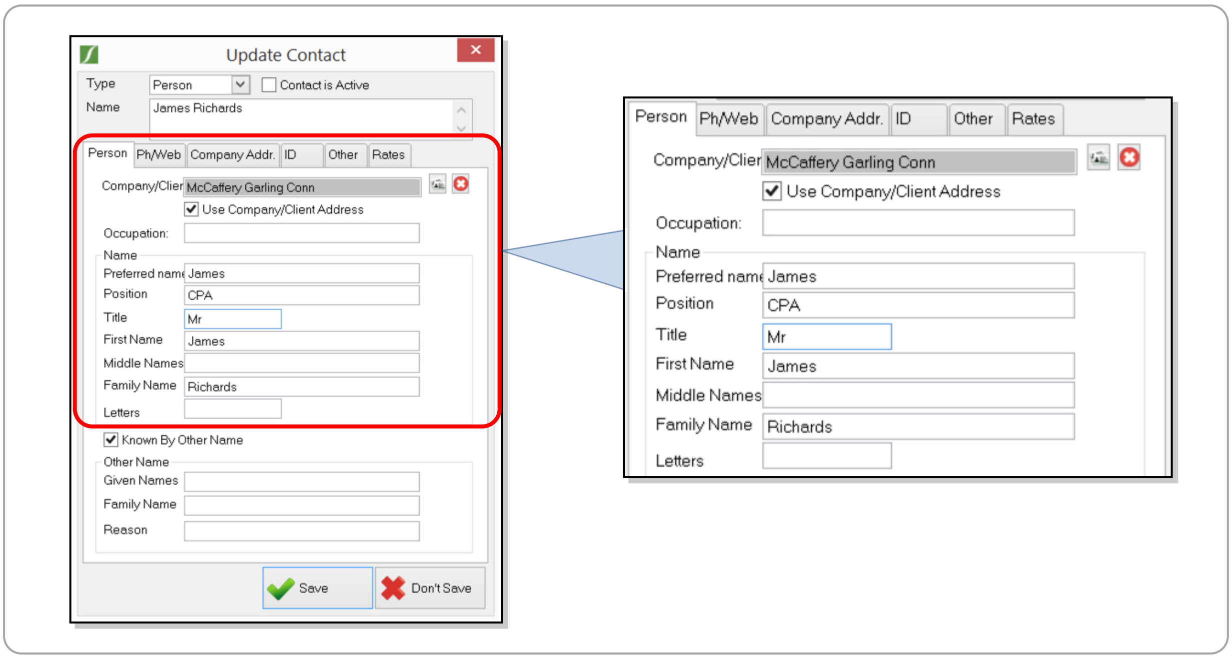
4.2 Update Contacts Tabs

Adding a person as a contact

When you fill out the Update Contacts window there are several Tabs which can be completed when you are adding a person as a contact. They are Person, Phone/Internet, Address, Identity/Notes, Other

We will be exploring each of these tabs below.

Person Tab



NB: The **Person** Tab is only enabled if the contact Type is a Person/Party/Payee/Payor.

Company/Client: If the person works for a firm you can select which firm they belong to by clicking on the button to the right hand side of the Company/Firm field. (You will need to have added a Firm as a contact before you can select it. Refer to the next section to see how to add a Firm as a contact).From here you can search the Company or Firm to attach this party to (if appropriate).

Occupation: This is where you can enter their job title.

Use Firm Address: If you have selected a firm for the contact, you can check this box so SILQ will get the address from their firm's address details. This way you only need to enter the address for the firm and everyone at the firm gets that address. If the firm address changes, you only need to change it on the firm's contact record.

Preferred Name: This is what you would write at the start of a letter after "Dear". Eg if you want it to say "Dear Adam" then enter "Adam". If you want to remain more formal, you would have their preferred name is “Mr Jones”

Position: If you know their position within the company, you can enter it here

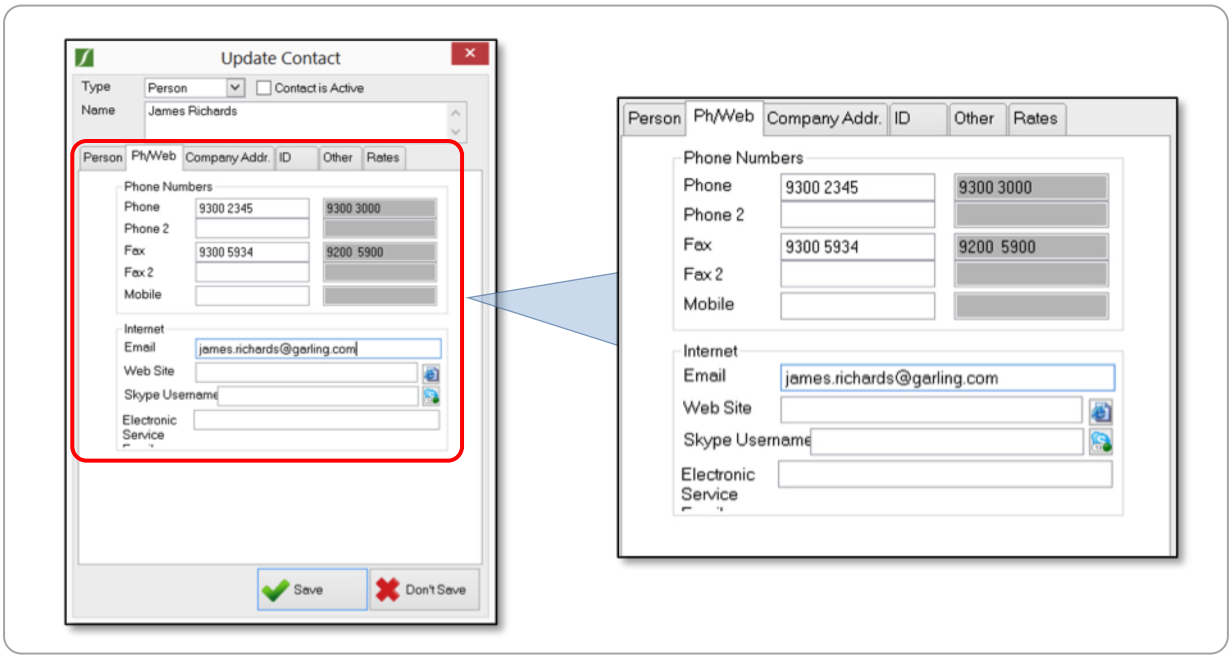
Title: This is where you can enter their title

First Name and Family Name: These will automatically be entered when you type in the persons name in the name field at the top of the Update Contact window.

Letters: Any letters that may appear after the party's name that would need to be put on there

Known by Other Name: If ticked, this will allow you to enter other names the party may be known as

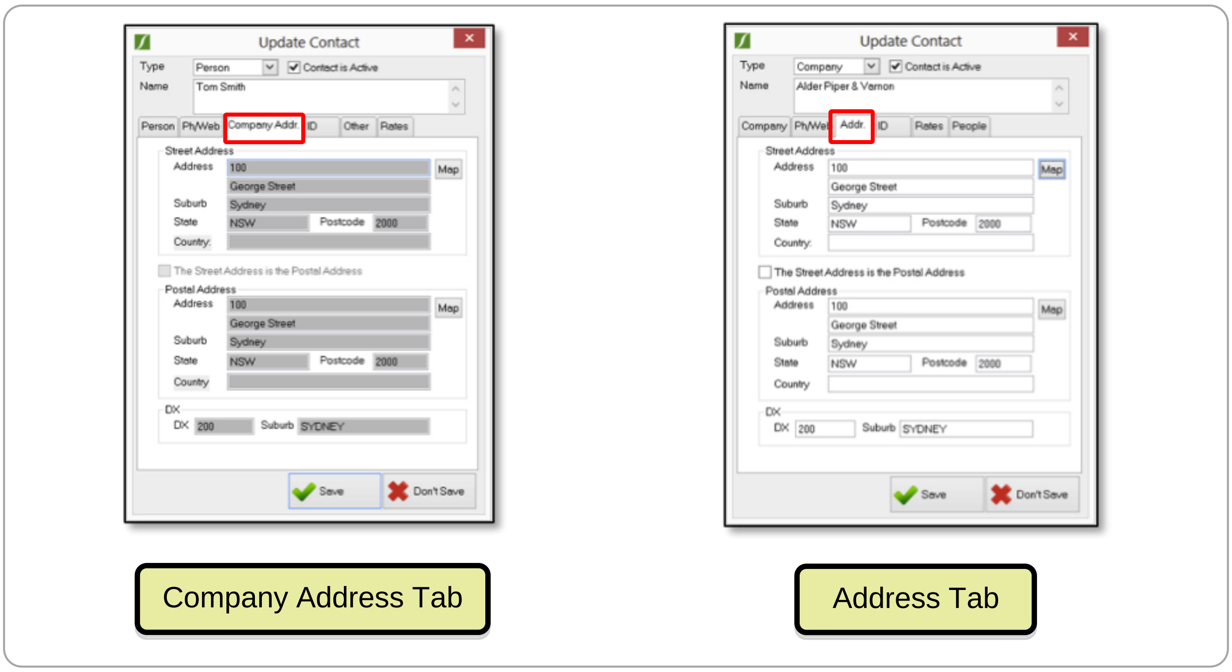
Phone/Web Tab



Phone Numbers: Enter the phone, fax and mobile numbers for the contact. If the contact belongs to a firm, then the firm phone numbers will be visible on the right hand side in the grey boxes. This allows you to have general company phone numbers as well as direct lines.

Internet: Enter the Internet information for the contact. SILQ can send emails, so if you enter their email address sending of emails can become very quick and easy.

Address/Company Address Tab



The **Company Address** will be visible if you have checked **Use Company/Client Address** in the Person Tab, otherwise this Tab will just be called **Address**. Refer to the screen shots above.

Street Address: The street address of the contact

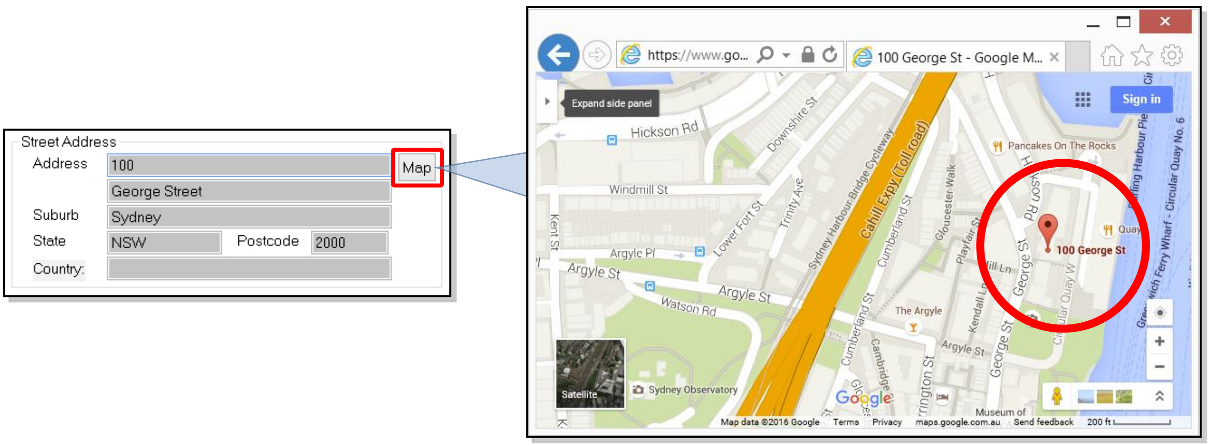
The Street Address is the Postal Address: Check this box and SILQ will use the Street Address as the Postal Address

Postal Address: The postal address of the contact

DX: The DX address of the contact

NB: SILQ uses a concept of "Best Address". This means it will firstly choose the DX address if the contact has one, then the Postal Address and then finally the Street Address. This way you don't need to remember if they have a DX address, it will use it by default.

Map Button: Next to the Address fields there is a Map button. Clicking on this button will launch Google maps in your web browser to show you the exact address location on a map.



ID Tab

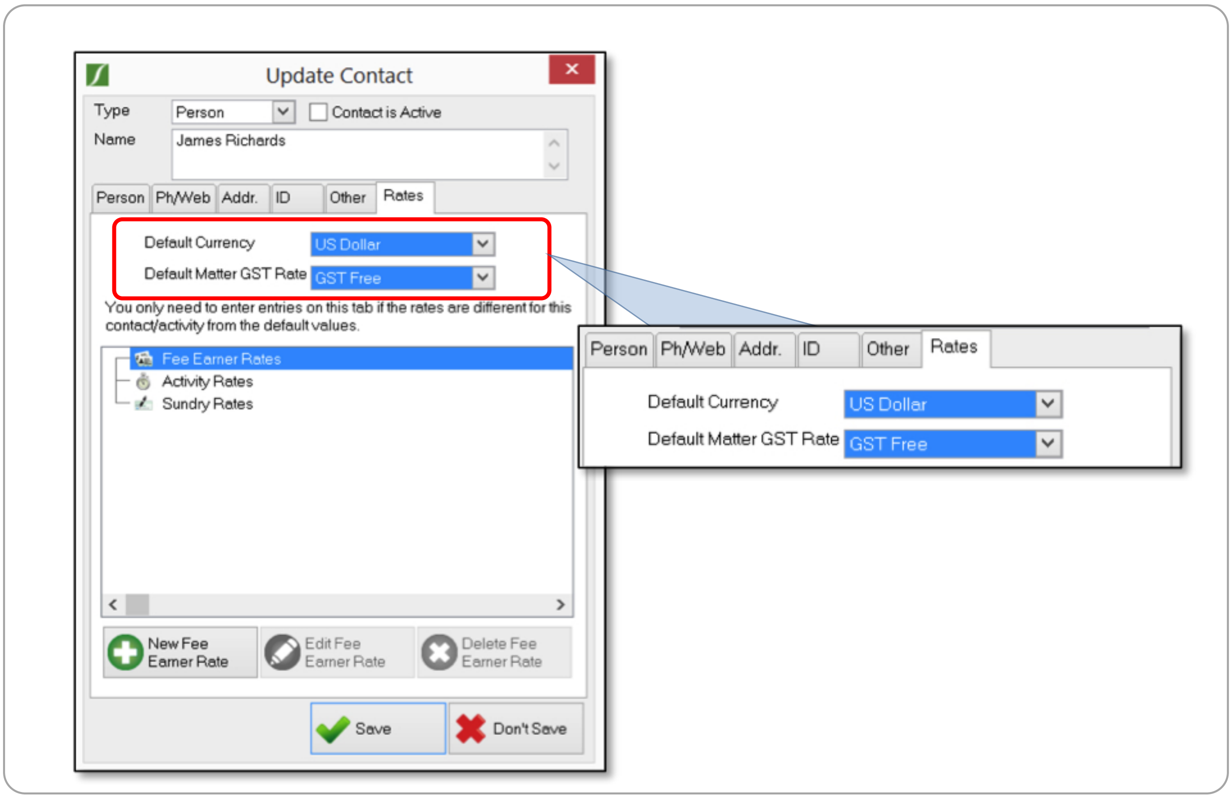
The ID Tab allows you to enter various identity related fields as well as notes.

Tick the **Sophisticated Client** tick box if you consider this contact a sophisticated client, that is, a law practice or an Australian legal practitioner, a public company, a subsidiary of a public company, a foreign company, a subsidiary of a foreign company or a registered Australian body (within the meaning of the Corporations Act 2001(Cth). If you are unsure whether your firm falls under this category, do not tick the box (contact SILQ for more information)

Other Tab

The Other Tab allows you to enter Birth, Death and Marriage details of the contact if required.

Rates Tab

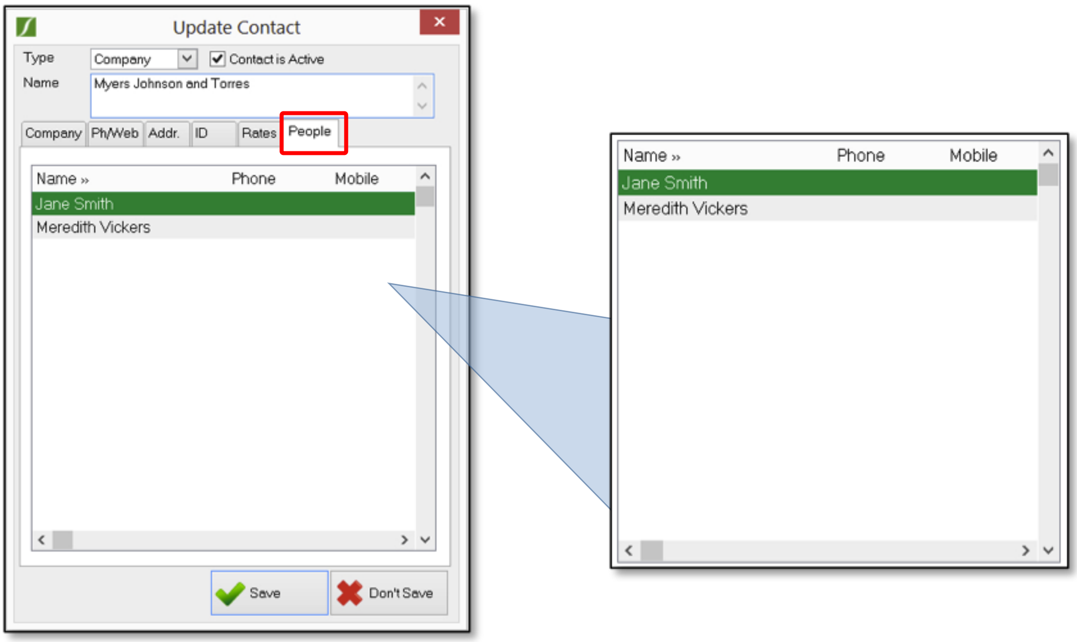


The Rates Tab is only available in SILQ Plus and allows you to select a default currency type for a particular client that can be used when generating an invoice. By default all time entries and are recorded in Australian Dollars, but if you want to generate invoices in a particular currency for a particular client, you can set the default currency type from the drop down menu which includes, US Dollar, Great British Pound, Euro, New Zealand Dollar, Canadian Dollar, Japanese Yen.

You can also choose from the Default Matter GST Rate drop down menu to select **GST Free** as the default rate for a particular client. What is chosen here will over ride the GST rate that is set in the matter for this client.

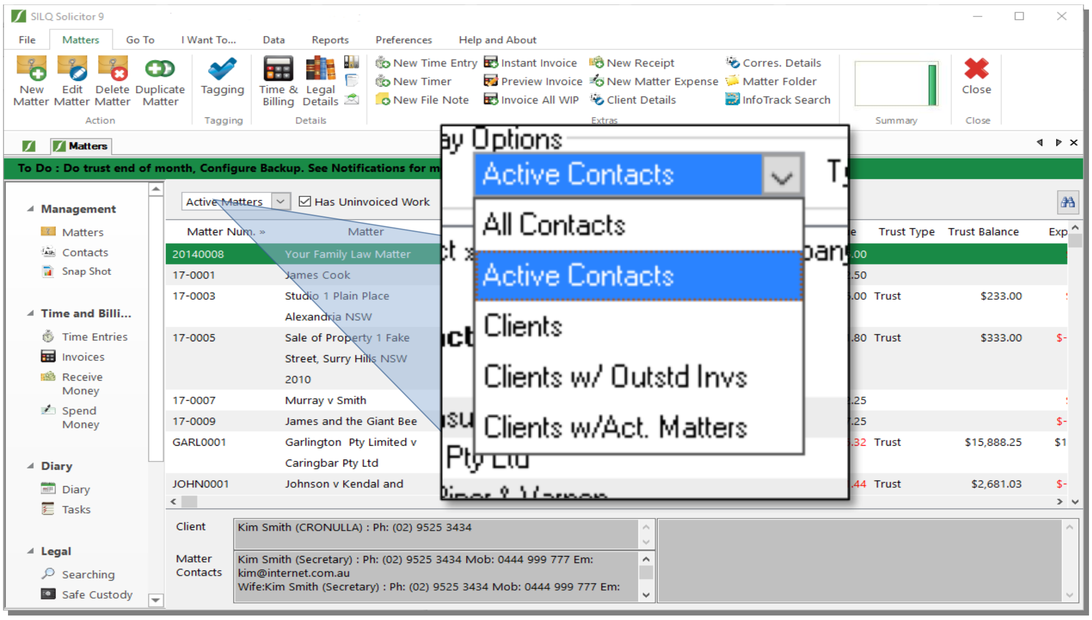
(To see how to generate an invoice with a foreign currency, refer to Manual 3 – Financial Management on page 25).

People Tab



When a Company contact record is selected and extra tab will appear called **People,** which lists all the people that are associated to the company.

4.3 Filter on the Contacts Window



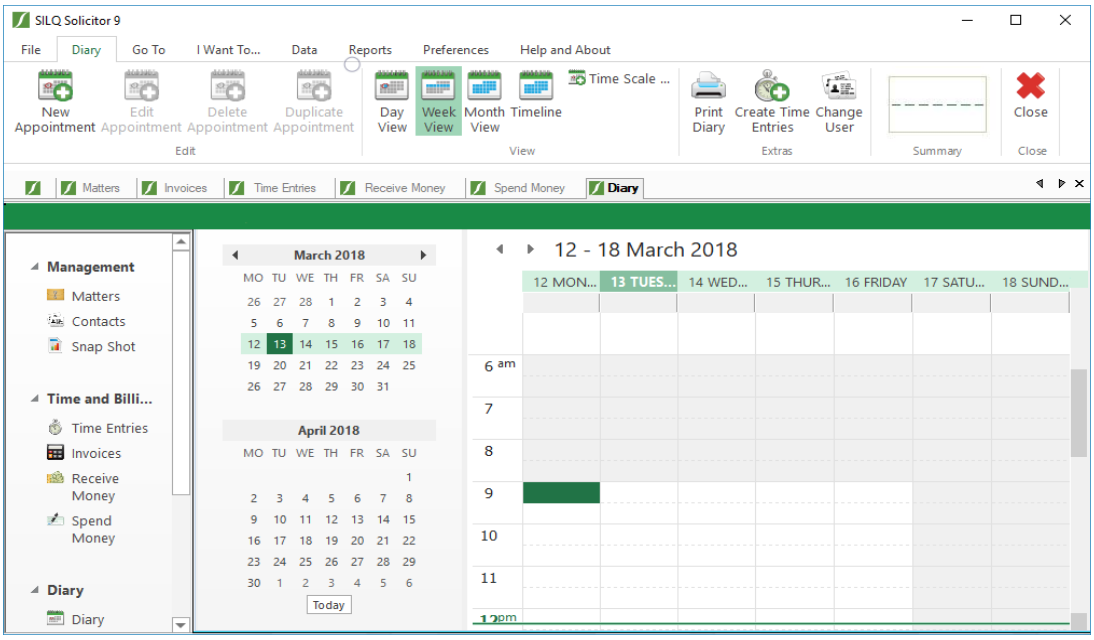
Filter on the contacts window that shows:

- All Contacts
- Active Contacts
- Clients
- Clients with Outstanding Invoices
- Clients with Active Matters

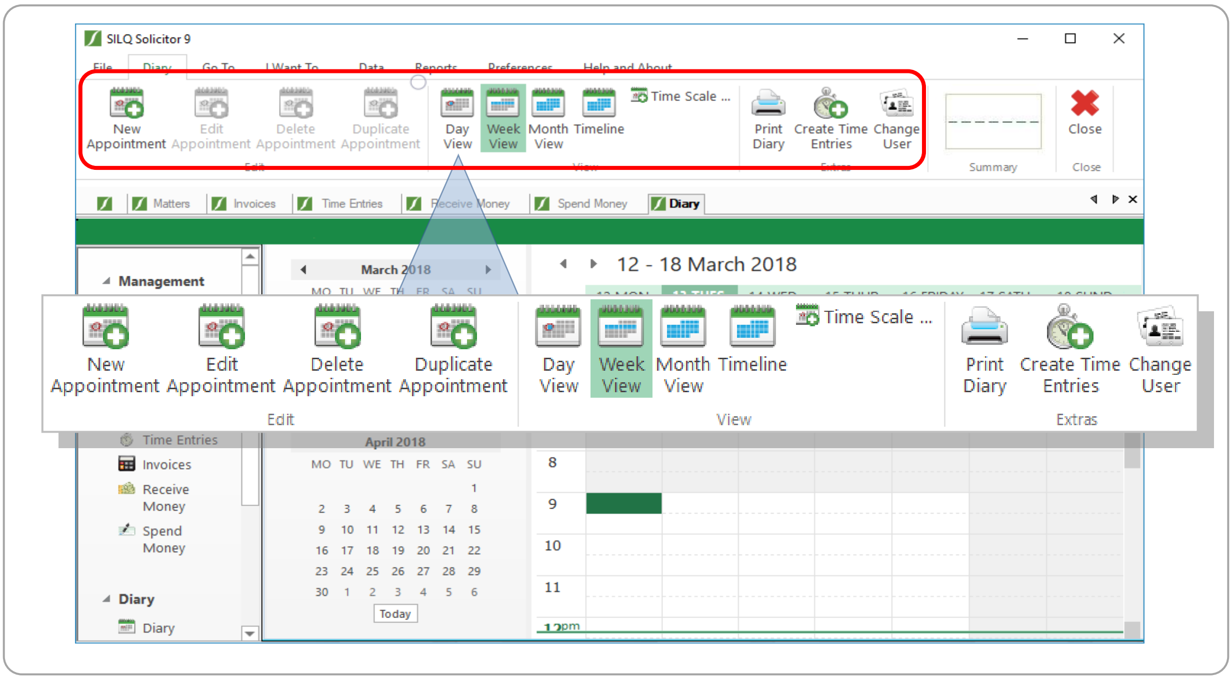
5. Using the Diary

Overview

- SILQ supports all the normal features of a diary including recurring appointments and reminders (with the ability to snooze and dismiss the reminders). This window allows you to quickly and easily show the appointments you have entered. Another great feature of the SILQ diary is that it is completely independent of such existing diary programs such as Outlook, so it is useful if you don't use Outlook and need a diary program.



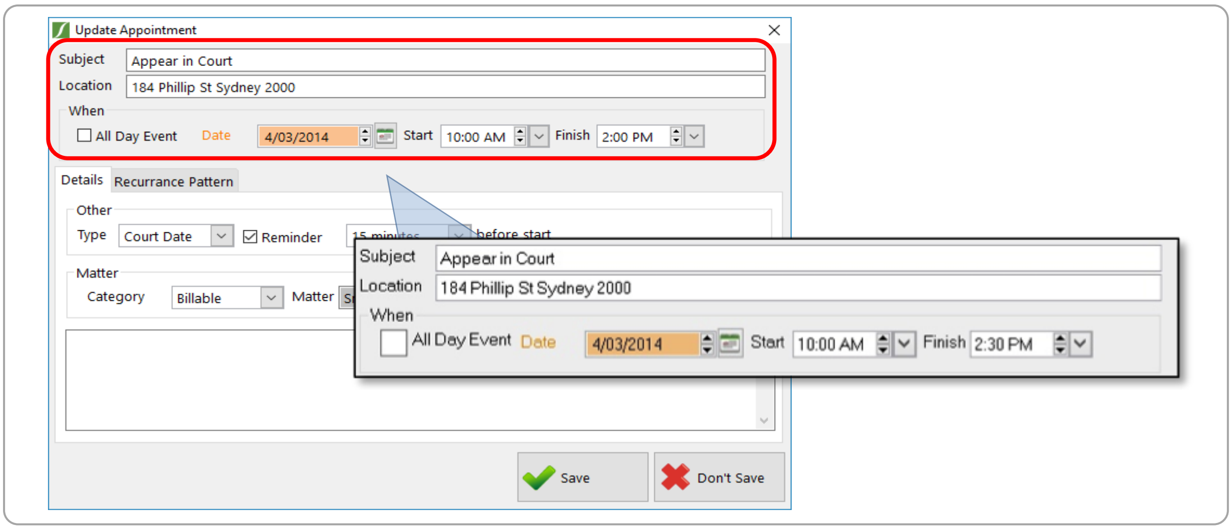
To access the diary in SILQ, click on the **Diary** Button on the left navigation bar.
When you first open the diary page, you will generally be presented with a daily calendar view showing your appointments for the week.



On the right-hand side toolbar menu, you can then access the main functionality of the diary:

- **New Appointment:** Click on this button to create a new appointment
- **Duplicate Appointment:** Click on this button to create an appointment that is similar to the selected one. It will create a new appointment that has the same details as the selected one
- **Edit Appointment:** Click on this button to edit the selected Appointment
- **Delete Appointment:** Click on this button to delete the selected Appointment
- **Day View:** This will show only one day of appointments at a time
- **Week View:** This will show 7 days of appointments in the view
- **Month View 1**: This will show a month of appointments in the view arranged in a grid. The appointments cannot be selected in this view
- **Month View 2:** This will show a month of appointments in the view in a similar view to the weekly view
- **Print Diary:** This will print the current view
- **Create Time Entries:** This will allow you to create time entries from the diary

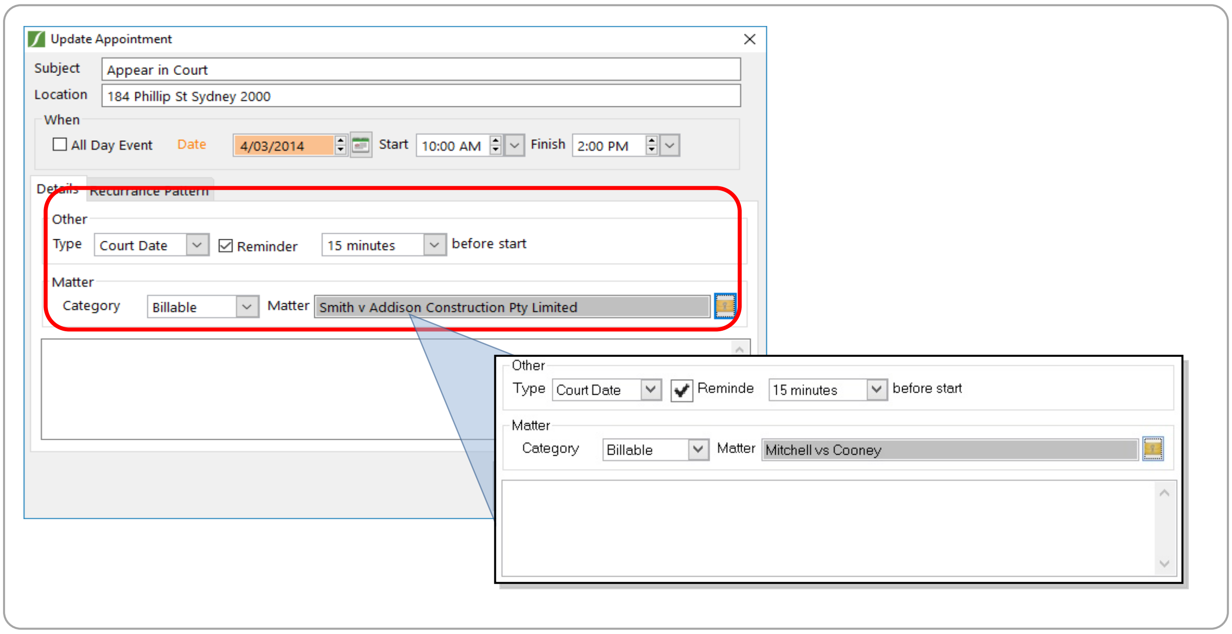
5.1 Entering a Diary Appointment



Either double click in the time field that you wish to create the new appointment in, or click once in the field, and then click the **New Appointment** button on the right-hand side toolbar menu. A new window called **Update Appointment** will appear. Enter the following details to create the appointment:

- **Subject:** The subject for the appointment
- **Location:** Where the appointment is going to be held
- **All Day Event:** If the appointment is not at a specific time or is for the full time you can use the All Day Event Flag. The diary will then display it at the top of the diary window
- **Date:** The date of the appointment. In the case it is a recurring appointment, this is when the recurrences start.
- **Start:** If it is not an all day appointment it is the time of day the appointment starts
- **Finish:** If it is not an all day appointment it is the time of day the appointment

Details Tab



Other section:

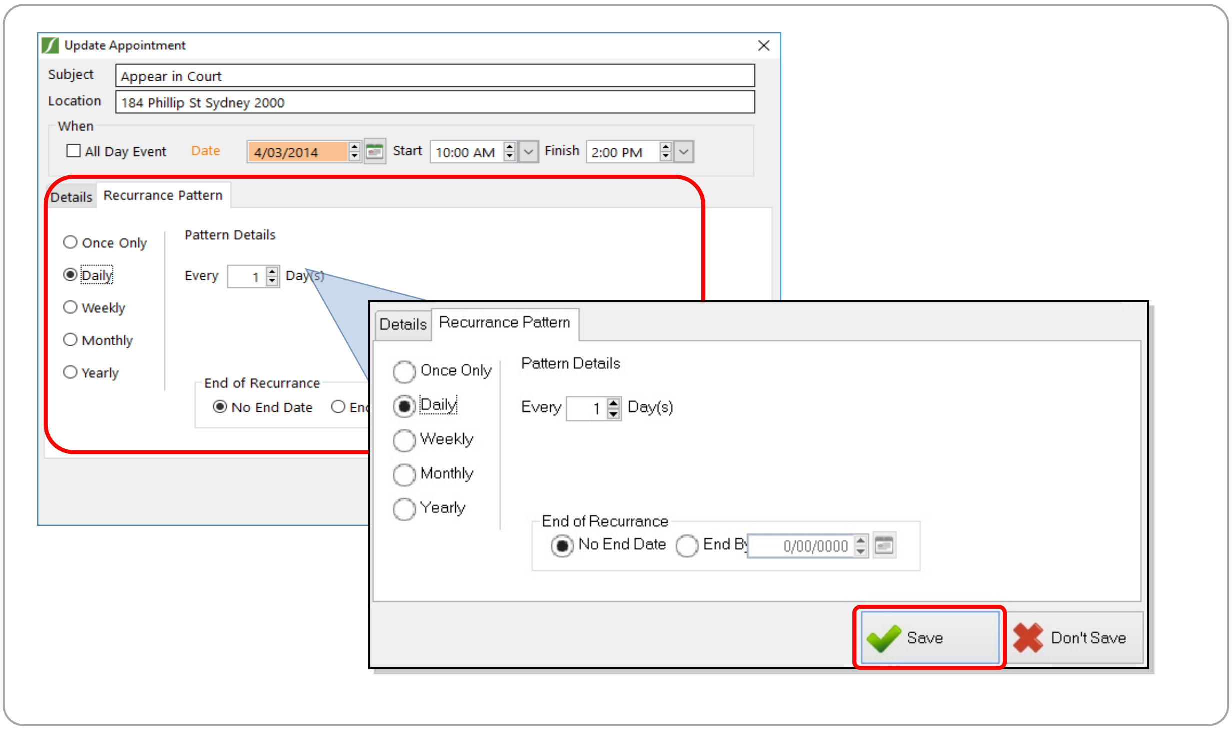
- **Type:** Select the type of appointment. Eg Conference, Meeting, Court Date etc. When displayed in the diary different types of appointments will be coloured differently depending on the type.
- **Reminder:** Select this if you want SILQ to remind you that the appointment is due to occur.

Matter Section:

Category: Select the category from the drop down menu. If you select Billable you can select the matter that the appointment belongs to by clicking on the button to the right-hand side of the Matter field and choosing the matter from the Select Matter window that opens up. This diary entry can then be used to create a time entry from a diary appointment. (Refer to page 45 to see how to create a Time Entry from a diary appointment) When displayed in the diary the edge of the appointment will be coloured differently depending on the category.

Matter: If the appointment category is Billable, then you can select which matter it belongs to. This means that if you use the Create Time Entries from Diary feature it will automatically know what matter it belongs to and pre-calculate the amounts for you. (Refer to page 41 to see how to create a Time Entry from a diary appointment)

Notes: Enter any additional notes that you want about the appointment.



Recurrence Pattern Tab

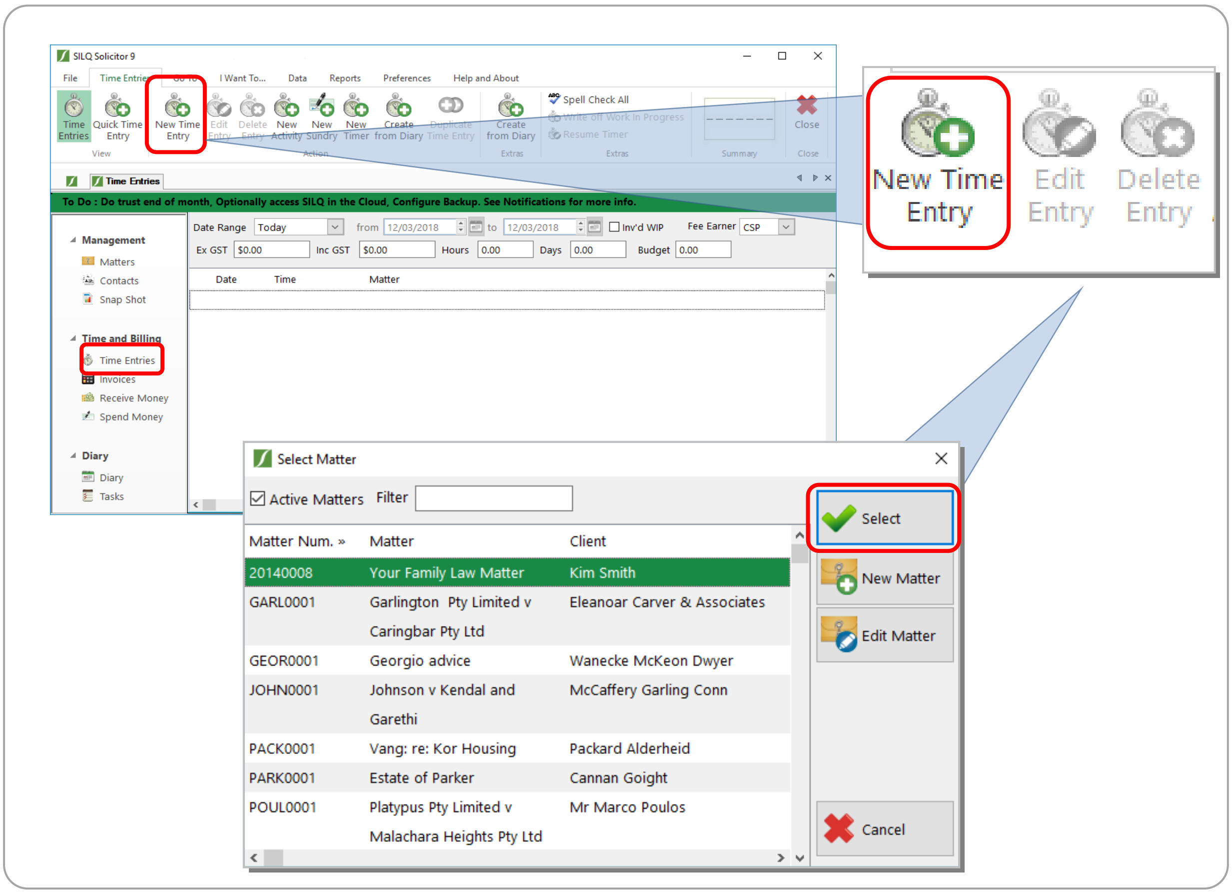
This section can be used for regularly occurring meetings. Recurrences can occur Daily, Weekly, Monthly or Yearly. Select the one you want and then set the pattern details exactly how it will recur using the options available. Selecting Once Only means it is not a recurring appointment.

Once you have filled in all the relevant fields, to create your appointment, click on the **Save** button.

6. Creating and Managing Time Entries

Overview
• Time Entries are the building blocks of invoicing. As you work, entering your time as you go makes preparing an invoice quick and easy as well you are less likely to forget about work that you have done and not billed. • We will explore 5 different way to enter time entries into SILQ.

6.1 Method 1: Entering via the Time Entries Window

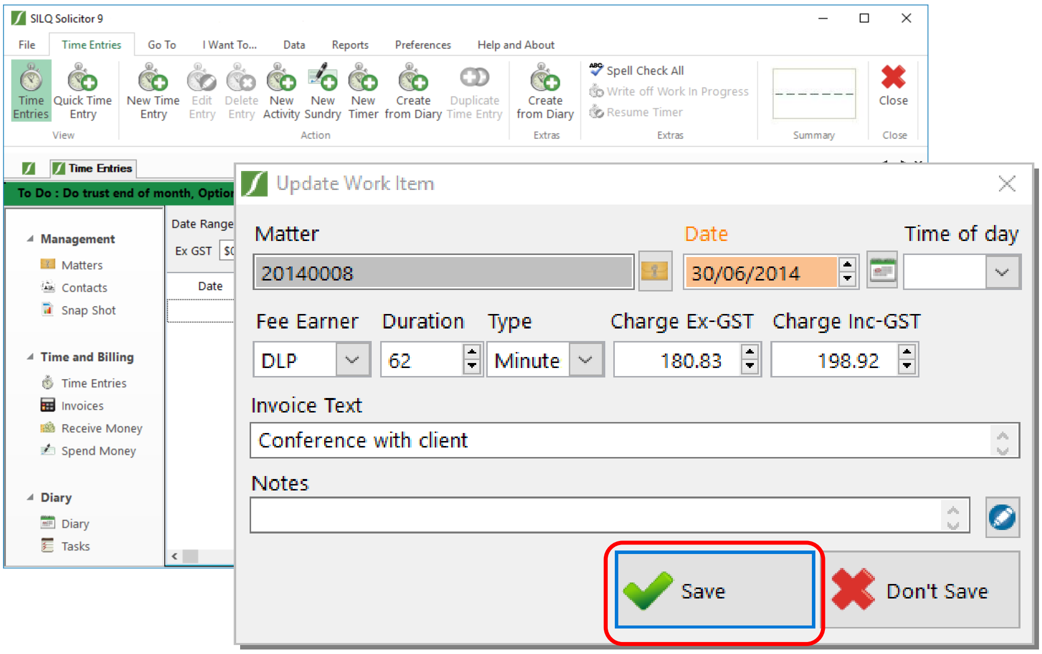


You can start entering your time entries via the main Time Entries window. To do this, Click on the **Time Entries** button in the Top Toolbar.

Note: You can enter a time entry for any matter on the Time Entries window.

Next, select the **New Time Entry button**.

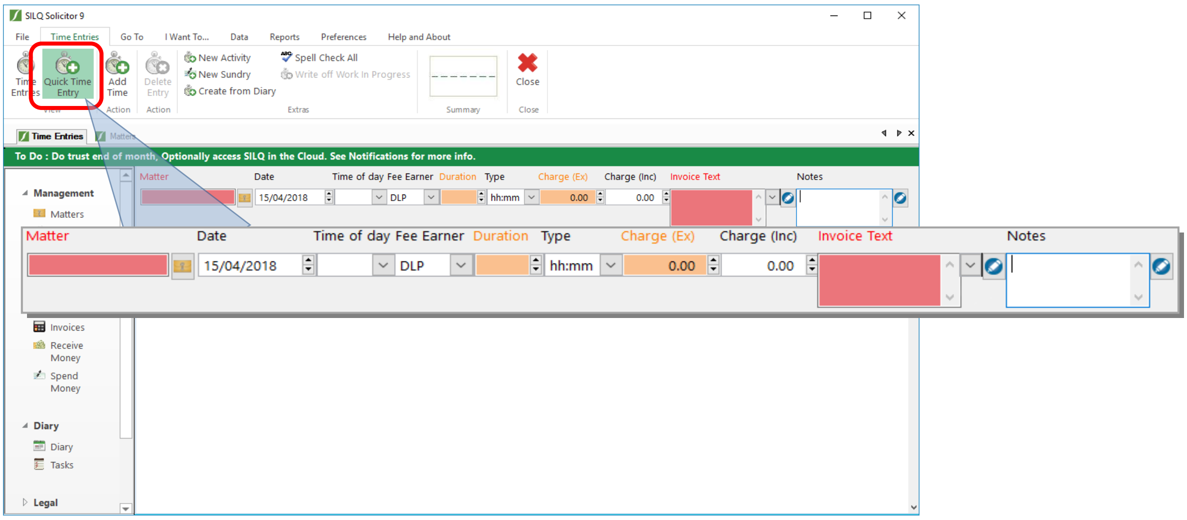
The **Select Matter** window will open up. Click on the matter to add the time entry against and click on **Select**.



In the middle of the screen the fields where you need to enter your time entry will become available. Enter all the information and then click on **Save** to record to your time entry.

- **Matter:** This is the matter the work was done for. Selecting the button to the right of the field can change this.
- **Date:** This is the date the work was done
- **Time of day:** (Optional) This is the time of day that the work was done
- **Fee Earner** select the Fee Earner from the drop down menu
- **Duration:** This is how much time was spent doing the work. This is used to calculate the Charge fields, based on the hourly/daily rates for the matter
- **Type:** This is the type of the duration. This affects the way you enter the duration and how it is displayed on invoices:
  - **hh:mm** : This allows you to enter the duration in hours and minutes format. This is useful when you want to enter an amount such as 20minutes which is not an exact decimal amount
  - **Hours**: This allows you to enter the duration as a decimal value such as 1.25 hours
  - **Minutes**: This allows you to enter a whole number value for the number of minutes.
  - **Days**: This allows you to enter a decimal value for the number of days
  - **Fixed**: Unlike other types, the fixed item does not use the hourly or daily rates to calculate the charge values. It is up to you to enter the amount that you want
- **Charge Ex-GST**: This is the amount to be charged, exclusive of GST. Even though this will be calculated for you when you enter the duration, you can override it with whatever value you want. It will also update the Charge Inc-GST field appropriately
- **Charge Inc-GST**: This is the amount to be charged, inclusive of GST. Even though this will be calculated for you when you enter the duration, you can override it with whatever value you want. It will also update the Charge Ex-GST field appropriately
- **Invoice Text**: This is the description that you want to come out on an invoice
- **Notes**: This is a field where you can make a note about the item that is not intended for the client to see

6.2 Method 2: Quick Time Entries



A quick way of entering time entries in the Time Entries window is via the **Quick Time Entry** tab which can be accessed in the time entries window on the top left-hand side of the window.

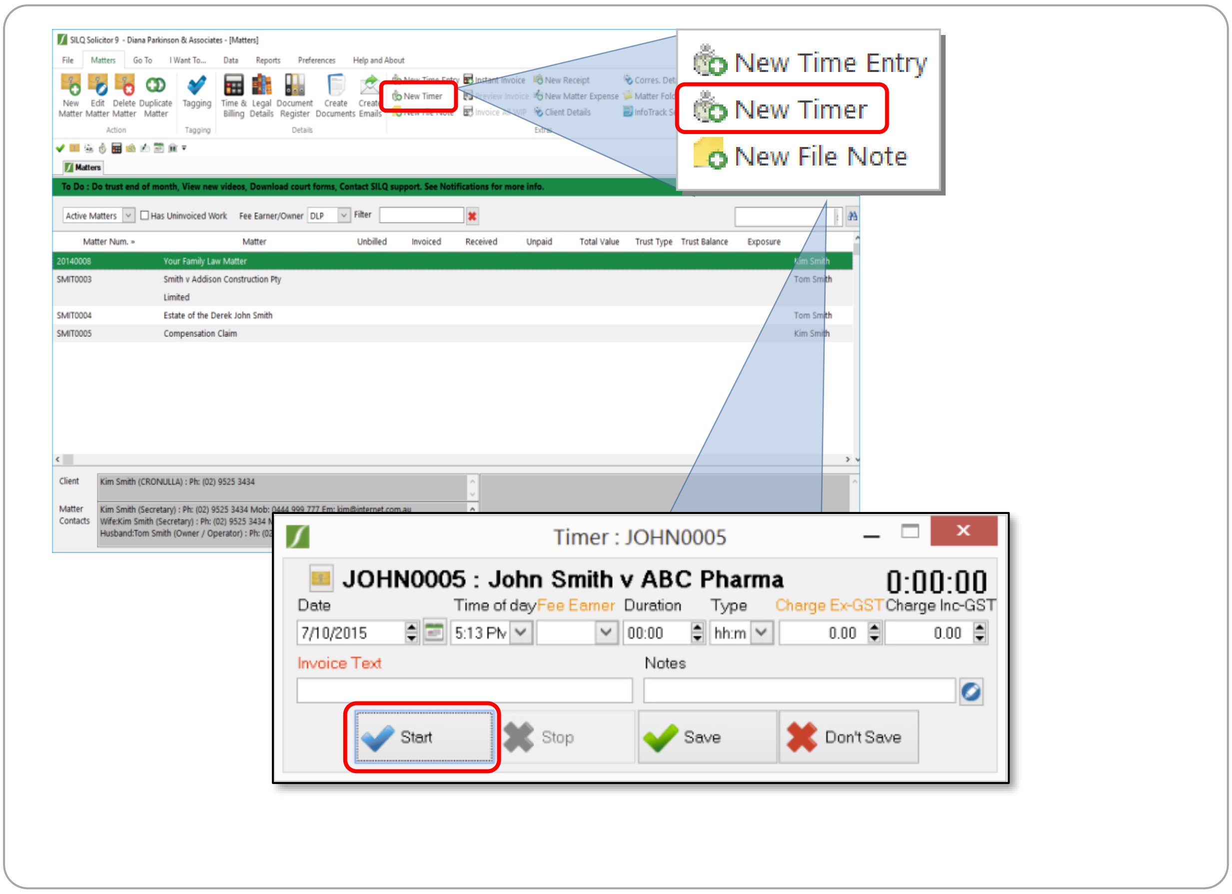
A range of fields will appear at the top of the window, where you can very quickly and easily select the Matter, add your time and invoice text the same way as described on page 42.

The benefit of adding time entries this way is that if you have multiple time entries to enter for a particular matter, you can easily select the matter and then just using the Tab key on your keyboard move to each field to fill in the relevant information. Once you have completed adding in this information, keep pressing the Tab key on your keyboard and then the **Add Time** button on the Top toolbar will become active and you can simply press the Enter Key to record this time entry.

Then automatically your cursor will be placed back at the beginning on the matter field ready for you to begin entering the next time entry for that matter, without you even having to use your mouse. This can save you a lot of time.

6.3 Method 3: Entering via the Timer

Overview
• The Timer is a particularly handy way of keeping track of how much work you have done on a particular task. It's also great if you don't know how long a task is going to take, but would like to record how long it takes with accuracy. Just set the timer going and then save it. The Timer can also be 'resumed' for a time entry and it continues from where you saved it. • For example: Let's say you are working on an entry for GEOR0001 and need to stop after 15 minutes to take an important phone call on another matter. After you have finished your phone call and wish to go back to the matter you were working on, simply select resume timer after clicking the time button and you can continue working and importantly, keep an accurate record of the time spent on this task.

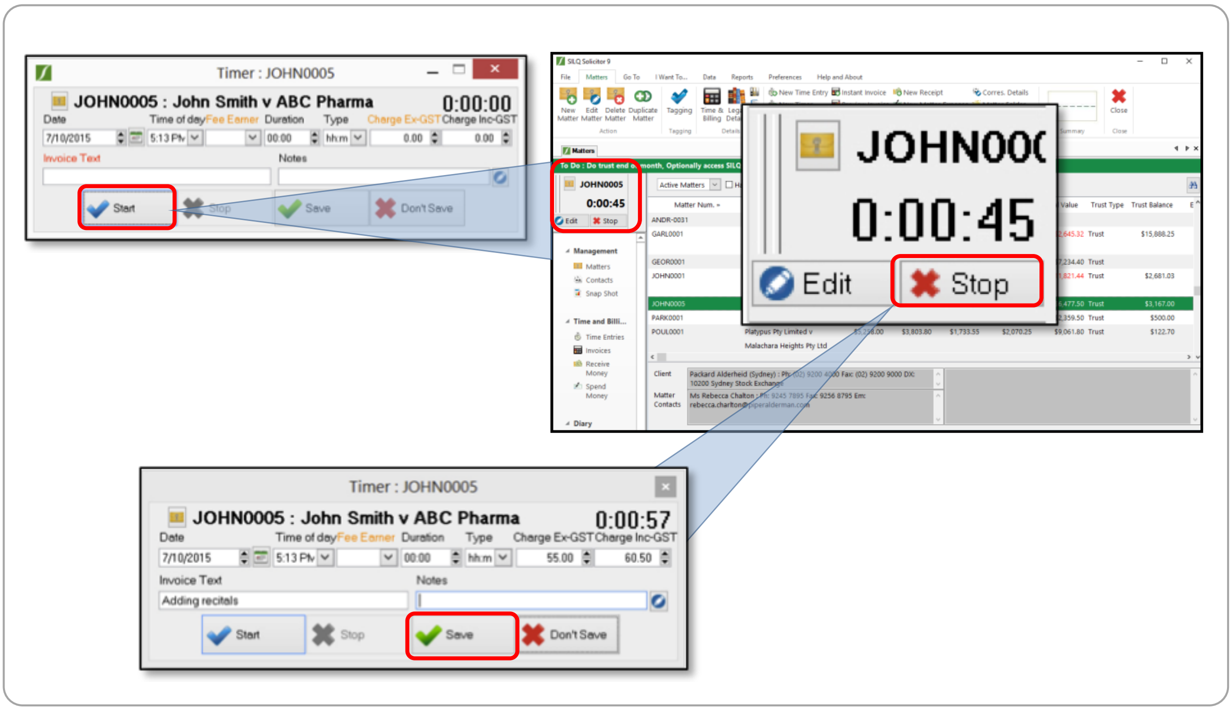


You can access the Timer via the Matters window. To do this highlight a matter then click on the **New Timer** button in the Top Navigation Bar.

Click on the **Start** button to start the timer. The Timer will close down and a smaller timer will appear on the top left-hand side of the screen.

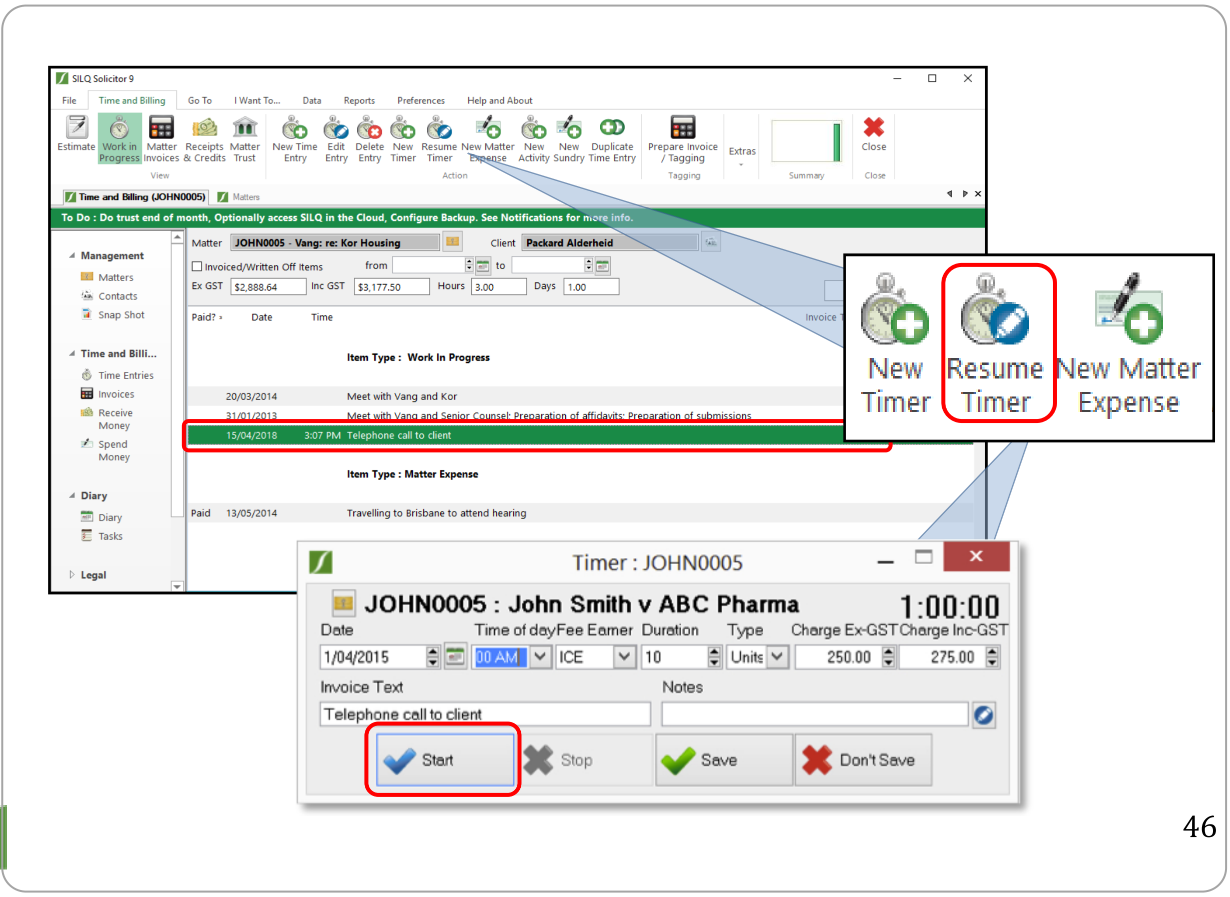
When you have completed your work, click on the **Stop button** under the timer.

The timer window will open up again and will have automatically put in your cost for the work you have done. Next enter the **Invoice Text** and then click on **Save** to record the time entry.

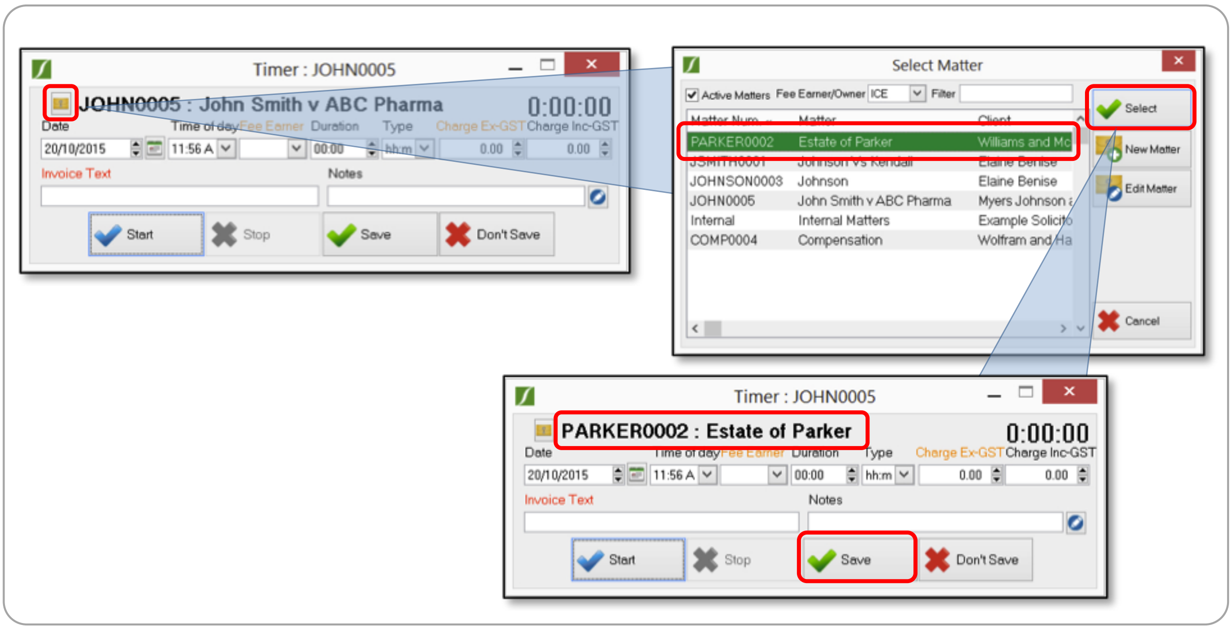


NB: You can click on the **Stop** button to pause the work you are doing, and then click on the **Start** button to resume the work you are doing.

You can also change the time or amount before saving.

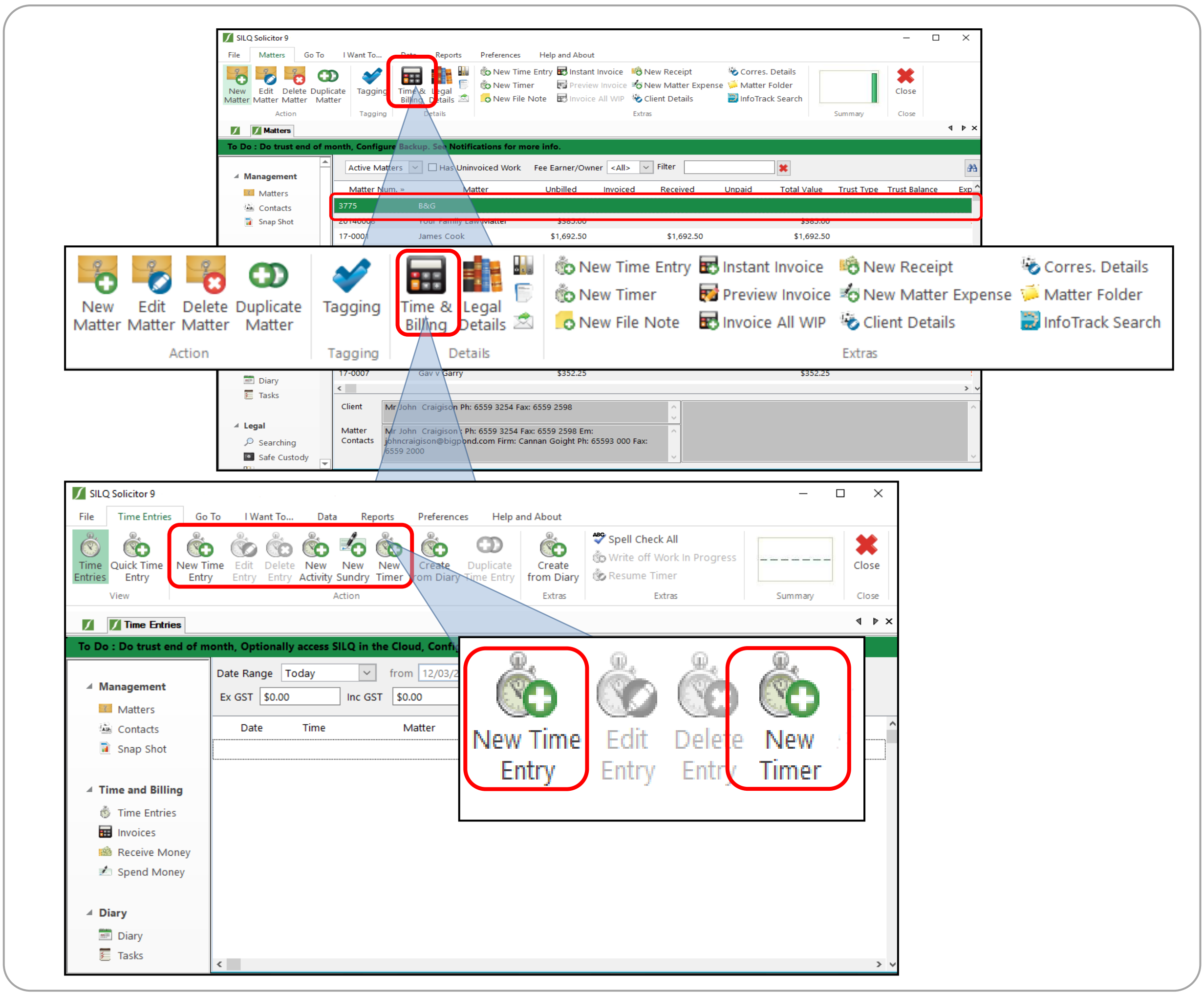


After you have saved the time entry, you can resume the timer even after the time entry has been recorded. To do this click on the time entry to select it and then click on the **Edit Entry** button on the right hand menu, where a drop down menu will appear allowing you to select the option **Resume Timer**. The timer window will open up where you can click on the **Start** button and it will resume the timer for the time entry, even if the time entry wasn't originally entered via the Timer.



If you have selected the Timer and realised you wanted to add time against a different matter to the one the timer is selected for, you can click on the Folder icon next to the Matter number and name. The Select Matter window will open up where you can click to choose an alternate matter and then click on the **Select** button. You can then proceed to start the timer and this time entry once saved will be recorded against the selected matter.

6.4 Method 4: Entering via the Time and Billing Window



You can enter Time Entries from the Time and Billing window. To get to the Time and Billing window, click on the **Matters** Button in the top toolbar

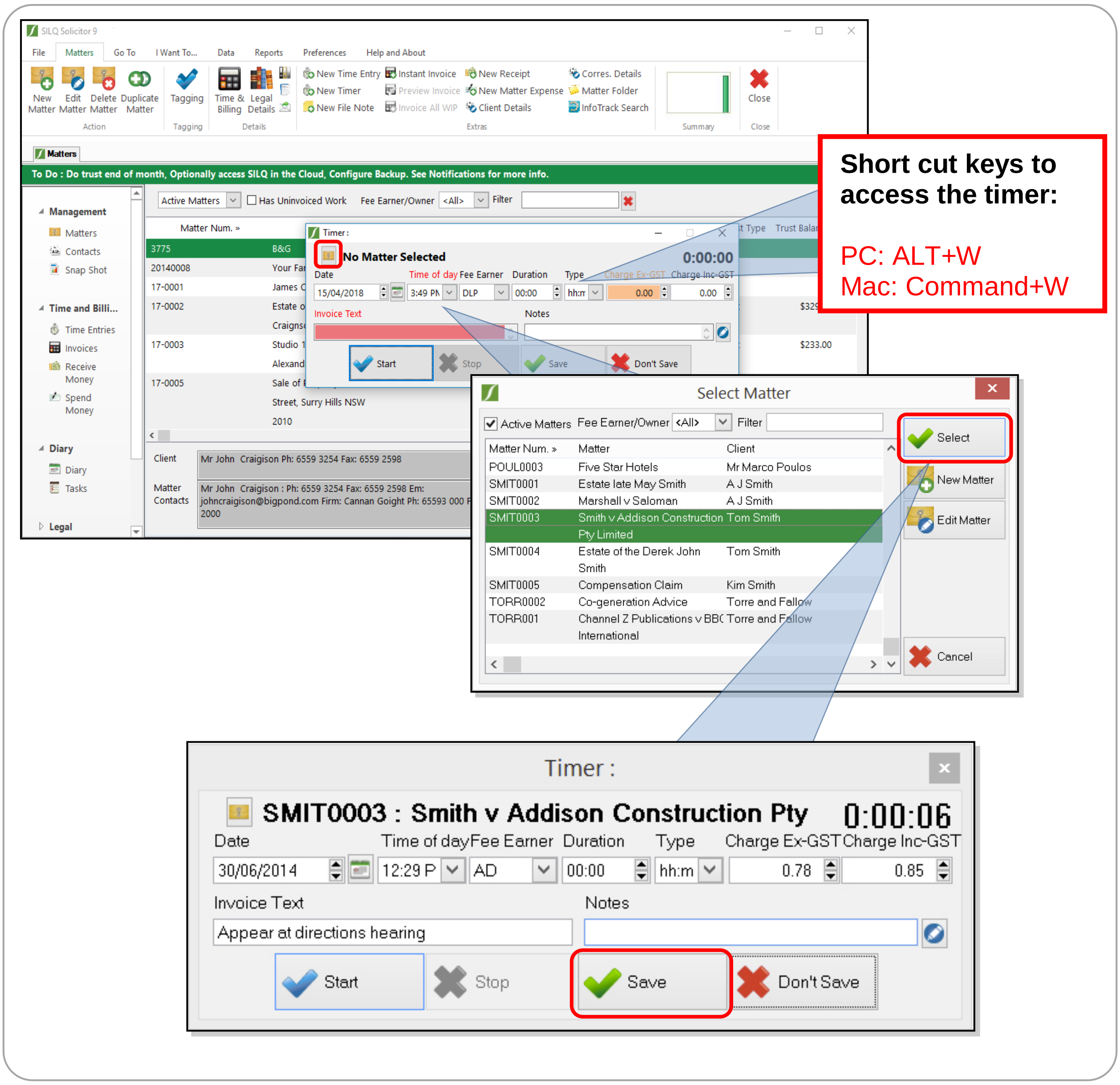
Once you are on the Matters screen, select the matter that you want to enter a time entry for and then click on the **Time and Billing** button on the top toolbar.

The Time and Billing window for the matter will open up.

You will then have access to click on the **New Time Entry** and **New Timer** buttons on the top of the screen.

NB: This is very similar to the Time Entries window but it is only for a specific matter. The Time Entries window view will show you Time Entries completed for all matters, however entering time entries via the Time and Billing window will only show you entries for the specific matter you are in.

6.5 Method 5: Access the Timer via a Short Cut from the Matters Screen



When you are on the Matters screen, there is short cut to accessing the Timer.

Holding down the Alt and W key on a PC, or the Command and W key on a Mac will instantly bring up the timer window.

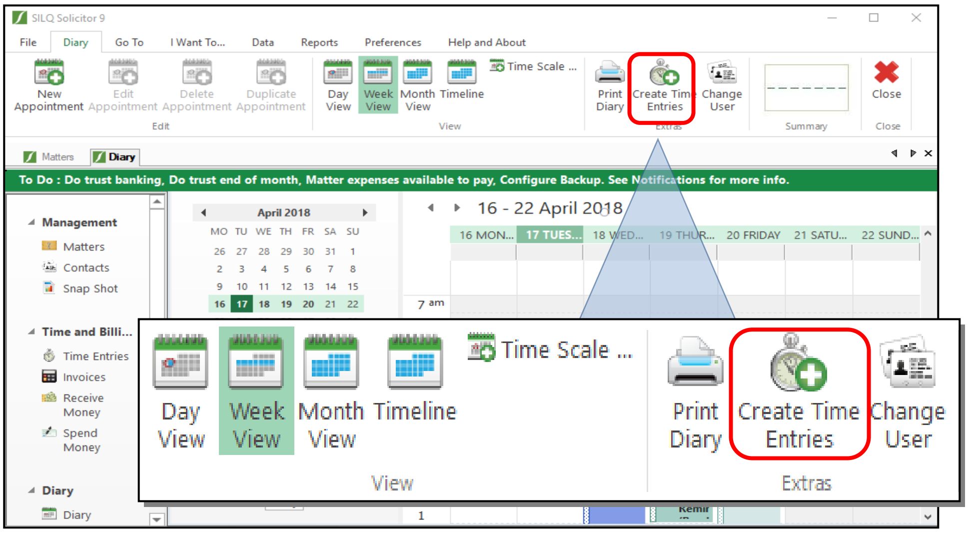
After the timer has been stopped, a matter can be selected to associate the recorded time to, the invoice text can be added and then the time can be saved by clicking on the Save button.

The time will be recorded against the selected matter.

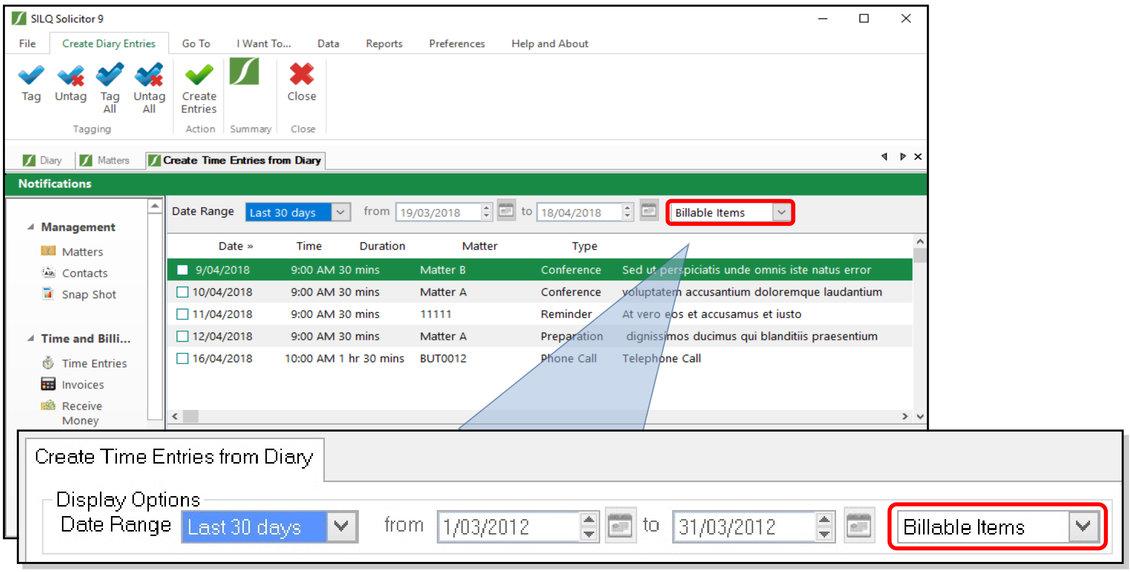
This is a very convenient feature if you receive a call and need to record time very quickly.

6.6 Method 6: Create Time Entries from the Diary

If you use the diary in SILQ, you can create a time entry from those diary appointments.

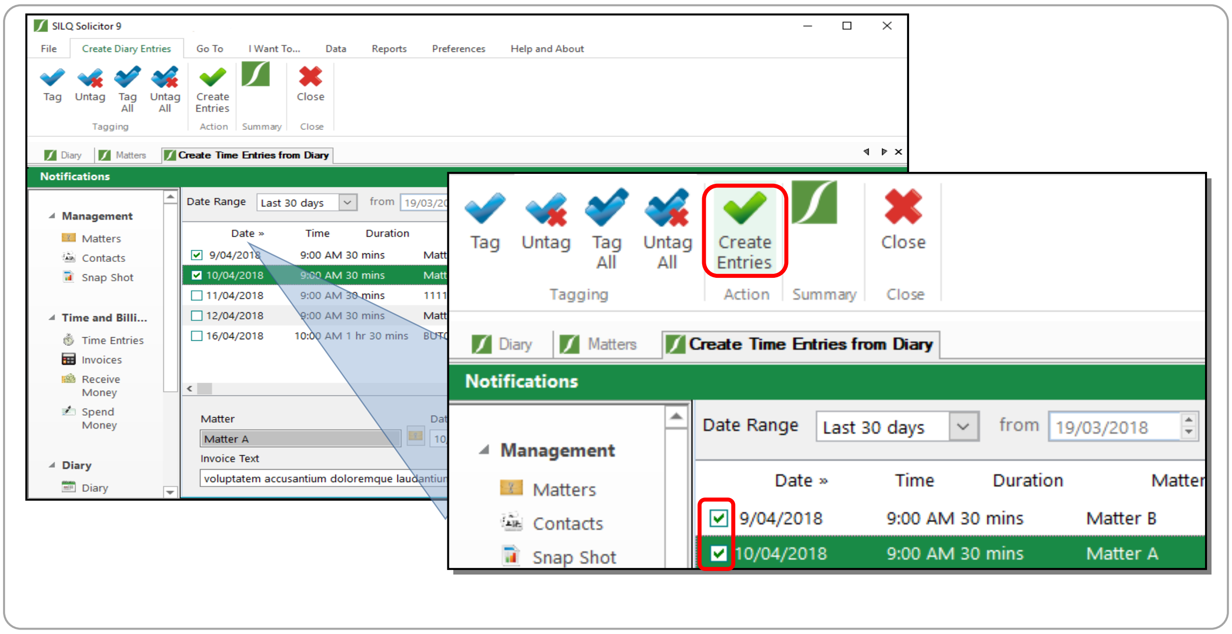


To do this, click on the Diary button in the top navigation bar. Once you are in the diary window, click on the **Create Time Entries button** in the right-hand side toolbar menu.



You will be brought to the **Create Time Entries from Diary** window.

In the Display Options section on the top left-hand side of the window section on the top left-hand side of the window, make sure Billable Items is selected in the last drop down menu. This will display the diary entries that you flagged as Billable entries that you wanted to record time entries against.



Next in the main window, you will need to Tag all the entries that you want to create a time entry for. To do this, click on the tick box to the left of each entry. Alternatively in the right-hand side menu, you can click on the **Tag All** button, which will automatically place a tick against every item.

You can change the value for any item at the bottom of the screen before you save the item.

Once you have tagged all the items, click on the **Create Entries** button on the right-hand side menu bar, which will create a time entry for each of the tagged items.