

Win You[®] *Law* 2010

Manual

F o l l o w M e

JL Inc. is a software engineering company that has focused exclusively on the development of WinYou Law. WinYou Law is programmed with Microsoft Visual C++ (same as Word and Excel) and uses Microsoft SQL Server 2000 / 2005 / 2008 as a database (the Personal and Workgroup Edition uses the Microsoft Access database format). WinYou Law runs on Windows XP / Vista / Windows 7 and supports Word 2003 / 2007 and Outlook 2003 / 2007. The software is protected by copyright. WinYou is a registered trademark and protected accordingly. All other trademarks or product names are property of their respective owners. © 2010 JL Inc.

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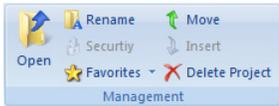
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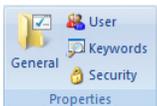
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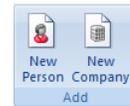
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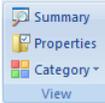
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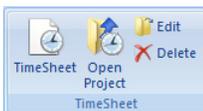
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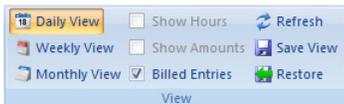
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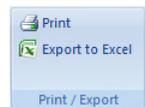
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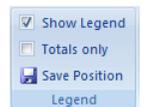
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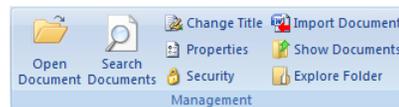
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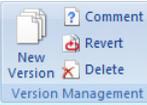


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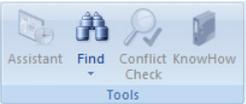
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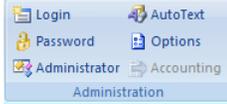
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What is where in WinYou Law?

WinYou Law has many views and can be customized in many ways. This is our standard view with a blue color scheme.

Fast switching to other programs such as Word, Excel, Outlook, etc. You can adjust the menu yourself

Tabs
Same as the activities in a law firm

Quick Access Toolbar for WinYou Law functions or commands
You can adjust the toolbar yourself

Ribbon
Contains all available functions and commands for the current tab (activity)

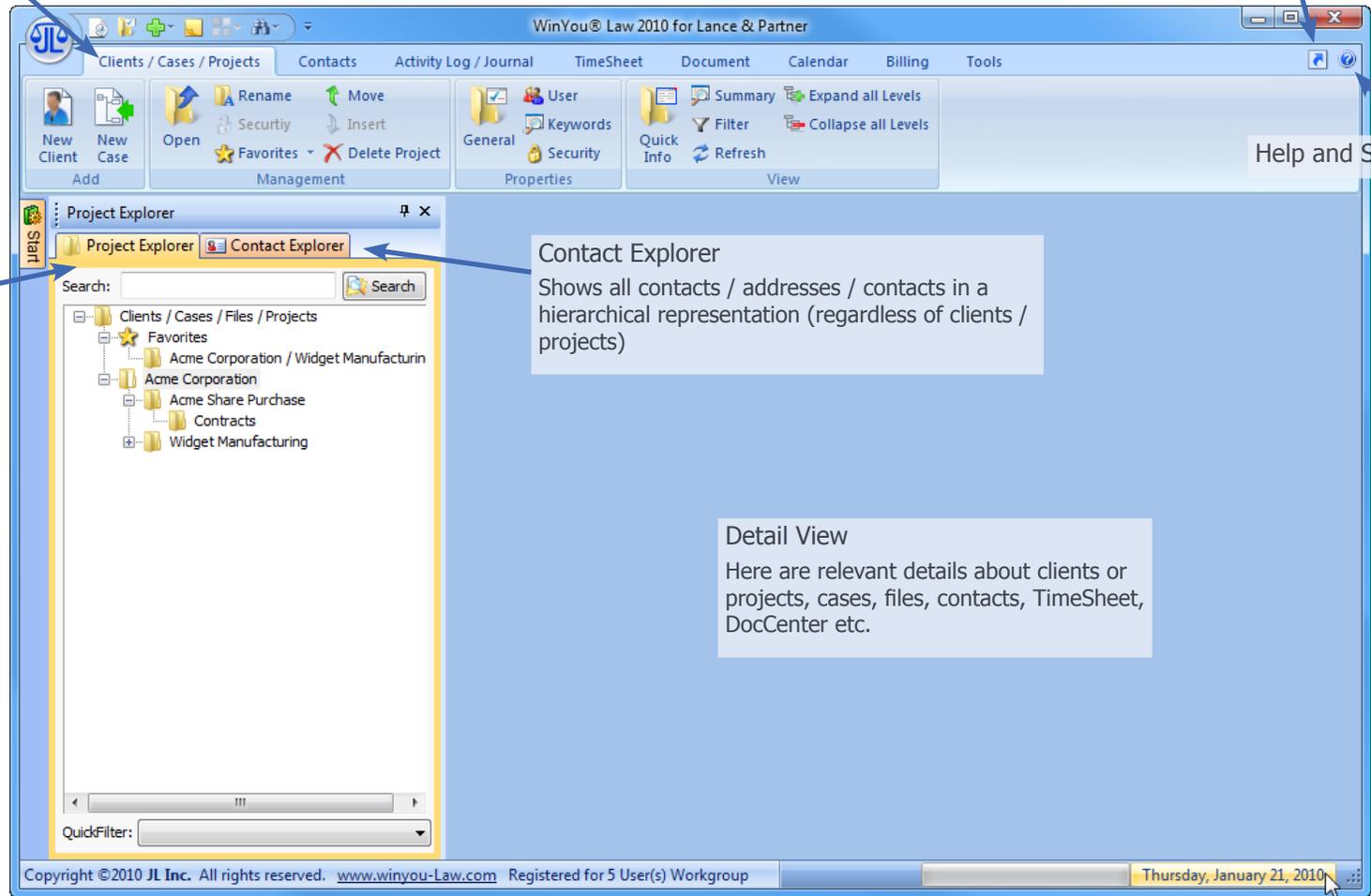
Project Explorer
Shows all clients / cases / files / projects in a hierarchical representation (unlimited levels)

Contact Explorer
Shows all contacts / addresses / contacts in a hierarchical representation (regardless of clients / projects)

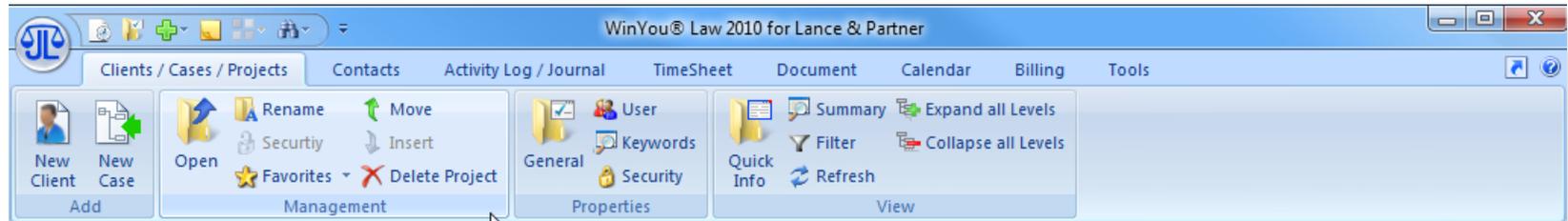
Detail View
Here are relevant details about clients or projects, cases, files, contacts, TimeSheet, DocCenter etc.

Help and Support

Quick Activate Calendar



In WinYou Law all commands and functions are here

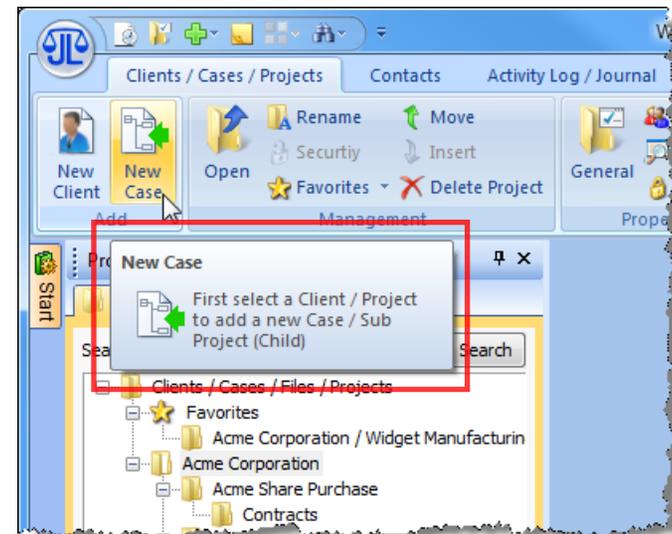


The tabs are arranged according to the activities in a law firm:

- Clients / Cases / Files / Projects
- Contacts / Addresses
- Log / Journal
- TimeSheet
- Documents
- Calendar
- Billing / Payments
- Tools

Each tab includes a toolbar (toolbar buttons and text) which is grouped for an easy overview.

Each button includes a text and an icon, so you can easily recognize what it is. If you want more information about this button, you simply hold your mouse over it until a short help (tooltip) shows up:

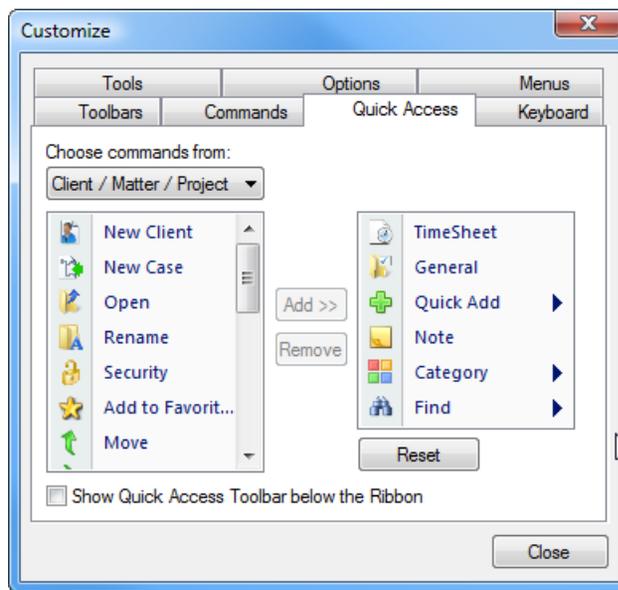
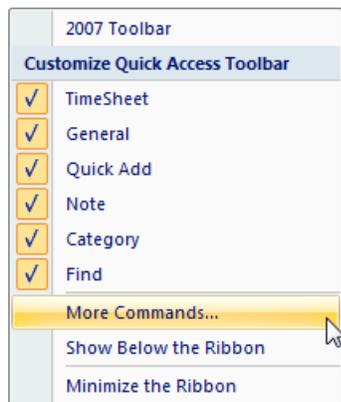


Quick Access Toolbar

These commands are always available, regardless of where you are in WinYou Law. You can adjust the toolbar yourself.



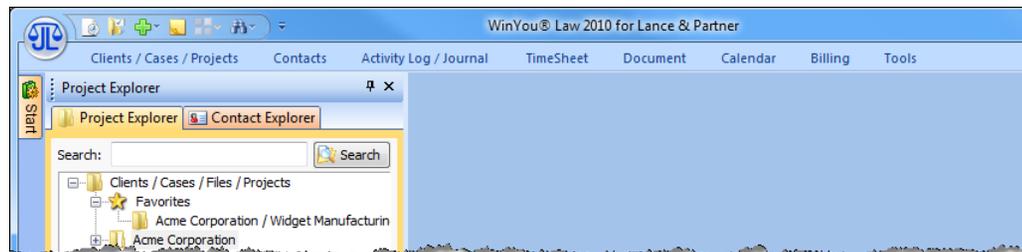
To customize, click the small arrow:



Here you can switch the default commands on and off. The menu item "More Commands ..." opens the "Customize" dialog. With the tab "Quick Access" you can assign other commands.

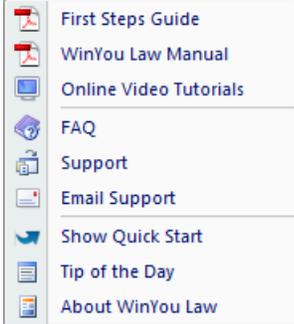
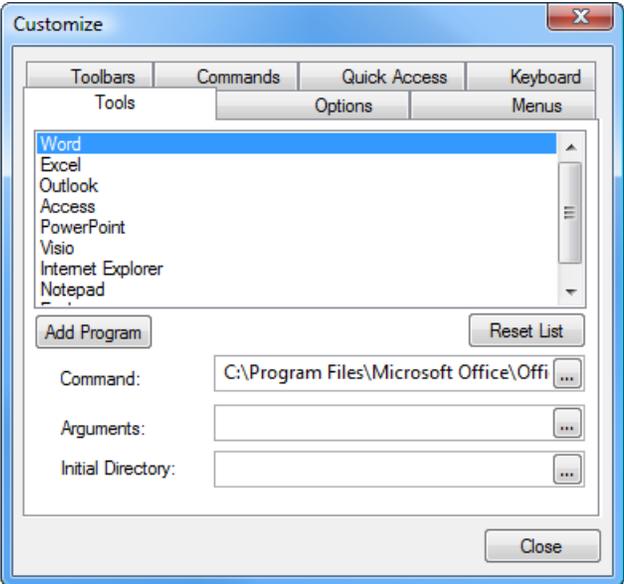
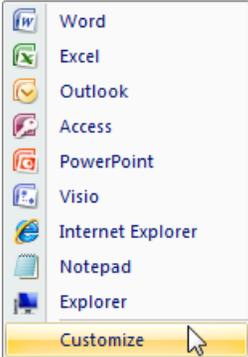
You can also position the toolbar below the Ribbon.

Furthermore, you can minimize the whole Ribbon - for a small screen this certainly makes sense - (click on a tab and the ribbon will be visible again).



Fast Program Switching and Support

The two icons in the Ribbon (on the right) enable the quick change to other programs or the access to various help options.



WinYou Law searches automatically for the standard programs installed, you can add other software or links yourself.

The Help menu provides several links to help and tutorials.

Status Bar:



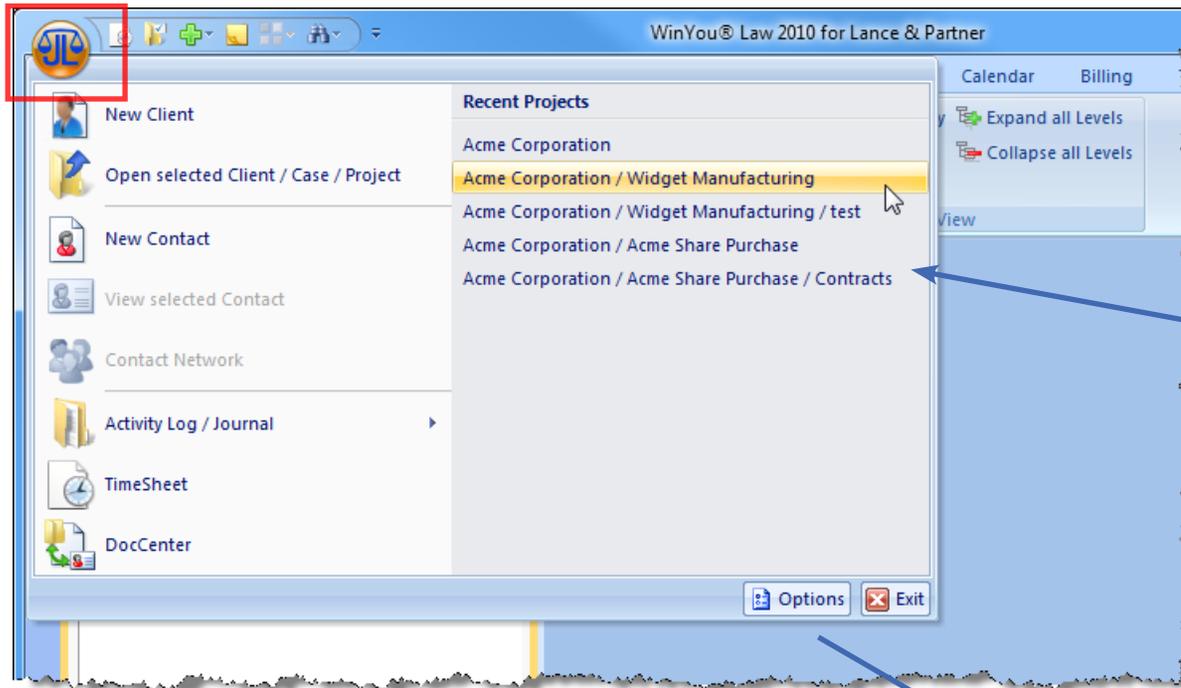
Link to WinYou Law homepage

Button for direct access to the calendar

WinYou Law Button

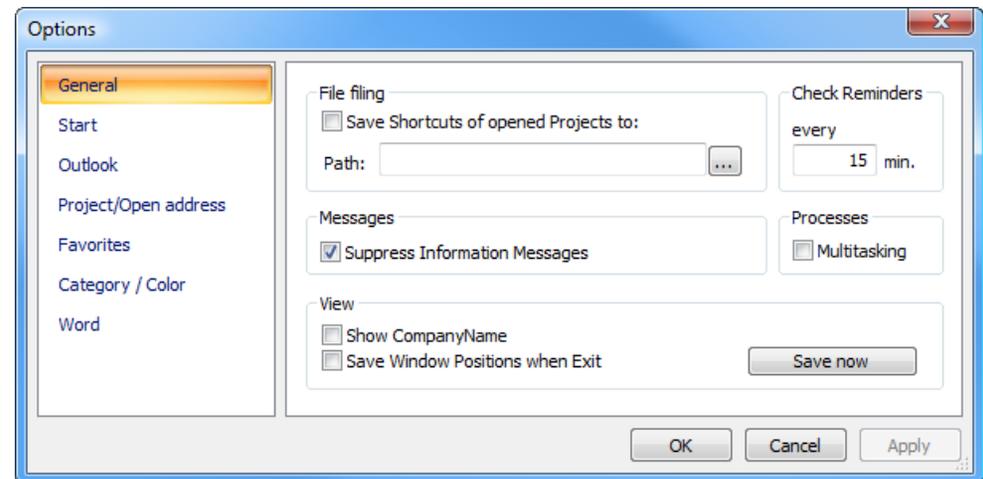
Gives you a list of recently used projects, as well as WinYou Law main commands.

(These commands can also be found in the Ribbon under the various tabs)



Recent clients / cases / projects are immediately visible and you can open them directly from here

Options for WinYou Law:
see also "Options: Start" on page 118



Date Fields in WinYou Law

The date fields are modified by clicking on the day / month / year.
You can also change the date directly or use the arrows.

Fee

Date: 10/10/2009

User: John Lance

From: 00:00 To: 00:00 Hours: 3.40 Type: [not specified]

Rate: 200.00 Total: 680.00 Sales Tax:

Text: Contract

Internal use

1/22/2010



January, 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 1/22/2010

2010

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

Today: 1/22/2010

2010-2019

2009	2010	2011	2012
2013	2014	2015	2016
2017	2018	2019	2020

Today: 1/22/2010

Clients / Cases / Projects

Management

This tab includes all commands and functions in relation to Clients / Cases / Files / Projects.



Project Explorer

The Clients / Cases / Files / Projects are organized in an explorer view (tree structure). The number of levels (hierarchy) is unlimited! Therefore you can for ex. organize your clients as the first level, then the cases or matters as the second level, if you have a lot of activities with a client, you possibly want to use further levels.

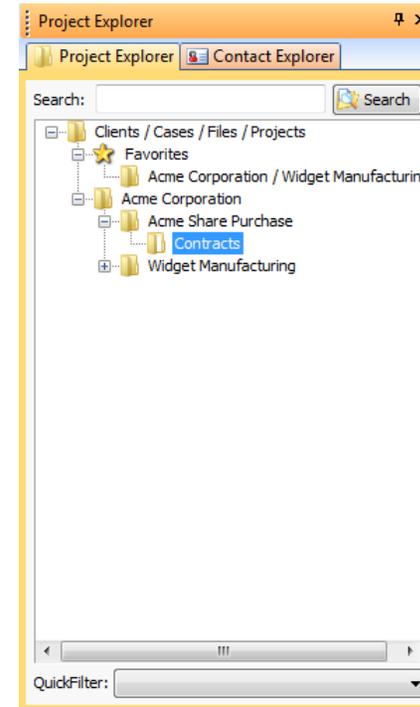
Projects with a [+] sign in front have subprojects. You can create as many hierarchies as you want. The projects or subprojects can be opened by double-clicking (clicking the [+] sign opens the project tree.)

Search in Project Explorer

To search in the list of projects, enter the first letters of the project name in the search field of the project list. If the desired project or subproject is available in your project list (filter!), then the entry is displayed, the cursor automatically jumps to the first entry. The F3 key selects the next matching entry.

You can also search directly for a project number: For example, search for project number 34, enter "#34". The corresponding entry is selected (assuming this is in the current project list and is not filtered).

WinYou Law reads data very quickly and can display thousands of projects almost immediately in the selected view. For individual views you can create your personal, user related, project filter.



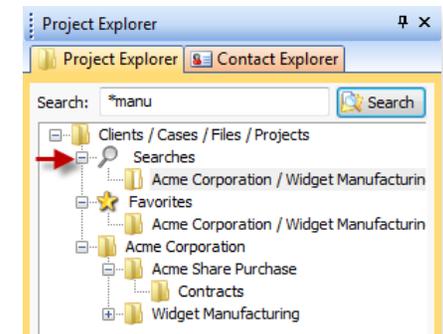
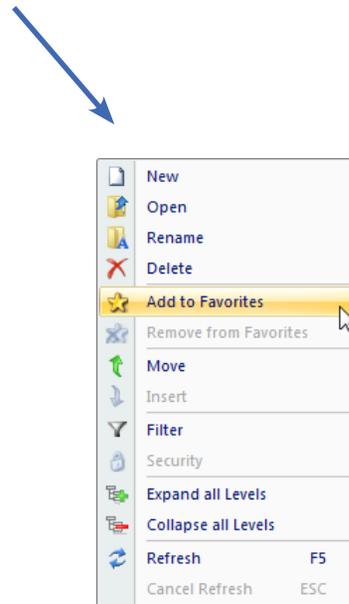
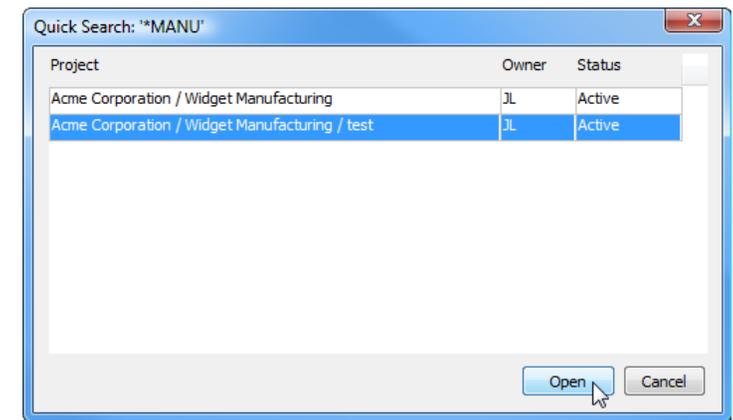
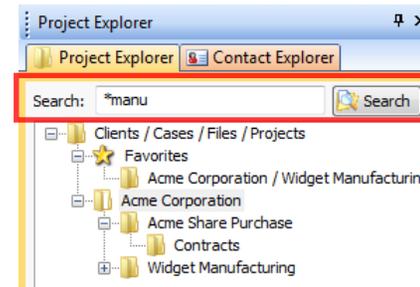
QuickSearch

If you know only part of a name, you can also type this part “*manu” and then click the “Search” button or press the F4 key. Now the entire database is searched and the search results appear in the dialog “Quick Search”.

Select the desired project and click on the button “Open”. This Project is shown in the list as “Searches”, and can now be processed normally. The search projects will remain in the project list until refreshed or a restart of WinYou Law.

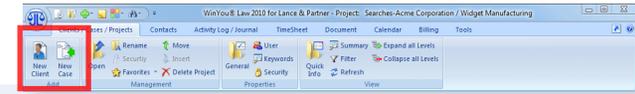
You can assign a search project, to your favorites by selecting this in the project list and click on the button “Favorites”.

Many commands are also available in the context menu of the Project Explorer (right click on a project).



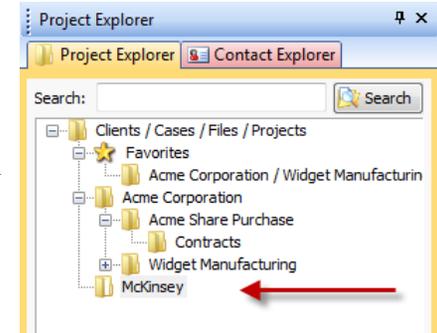
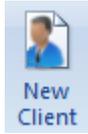


Add



New Client

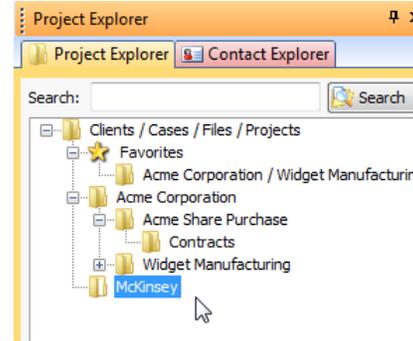
A new client or project is created on the first hierarchy level:
Enter the project name and close with the button «OK».



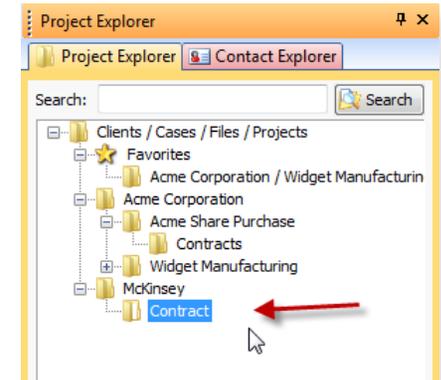
The new project will be inserted alphabetically in the list of projects and opened.

New Case

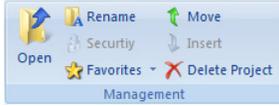
First select the client or the project (parent) in the Project Explorer.



Click on the button "New Case" and enter the name of the sub-project (child).



(In the dialog title, you see the name of the currently selected parent project). Click on "OK" to create the new sub-project. Many properties of the parent Client / Project will be automatically applied.



Management

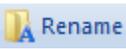


Open



Select the client / project which you want to open. You can also just open it by double-clicking the project name.

Rename

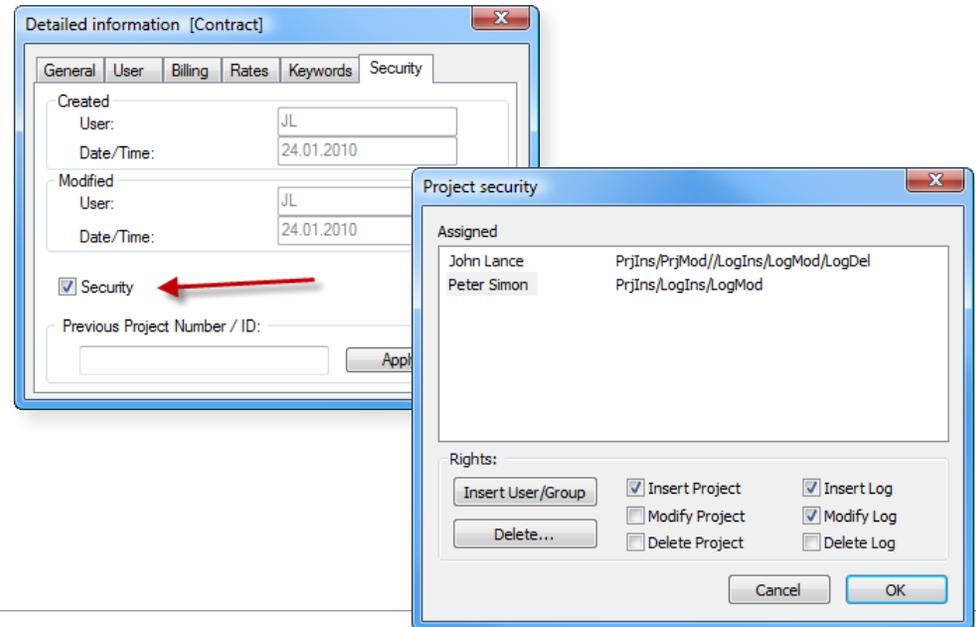


Rename selected Project.

Security



Security is normally off. See also "Security" on Page 21.
 You can grant other users / groups individual access rights to the project.

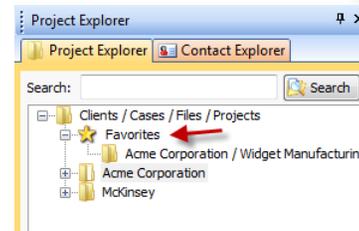


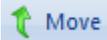
Favorites



Select a project and click on the Favorites button. The project will be added to "Favorites" in the Project Explorer.
 When you click the small arrow to the right of the button Favorites, a menu opens:

You can remove a selected project (in Favorites) from the Favorites list.

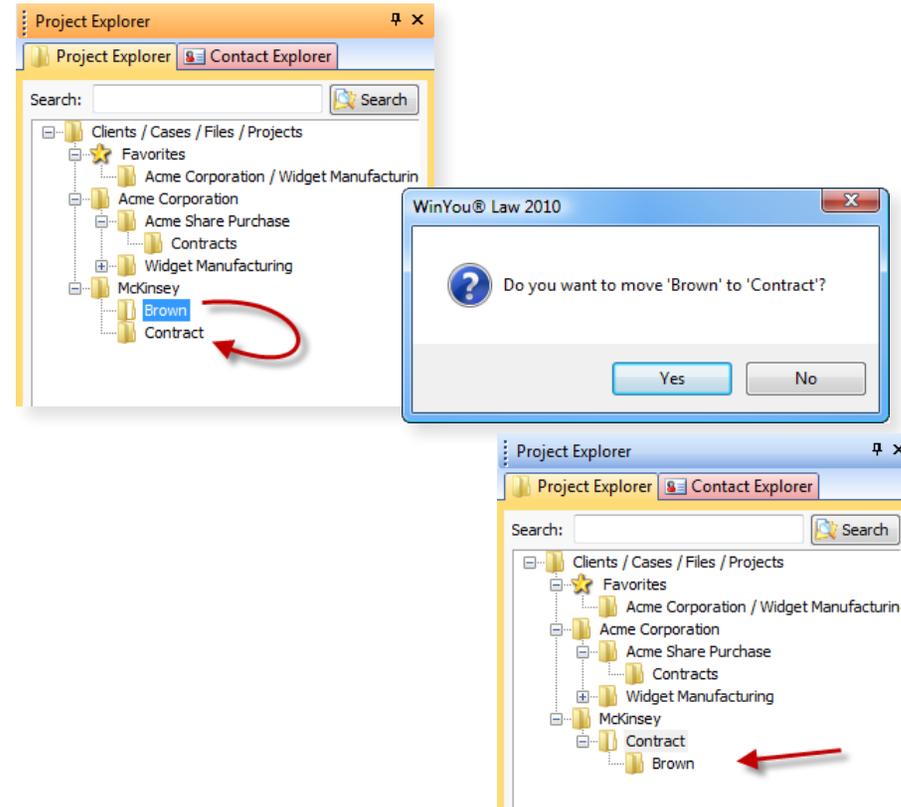


Move

Move

1. Select the project you want to move
2. Click the "Move" button (the button "Paste" will be enabled)
3. Select the new target client or project
4. Click on the button "Insert". The project will be moved to the target.

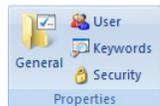
TIP: You can also do this directly with drag & drop!

**Delete Project**

Delete Project

Delete a selected (highlighted) project in the Project Explorer.

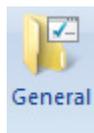
- All corresponding entries in the journal / log will be definitively deleted!
- All subprojects are also deleted!



Properties



General



In the window "Details" you see all the project properties:

- Client/project number (cannot be modified)
- Location of the project
- Start of project (today's date at opening)
- Responsible (e.g. responsible partner/case owner/project manager)
- Project language
- Status
- Description = Project description or information
- Filing = Filing place and / or filing number

Apply changes with the button "Apply"

Some of these information appears also in "Quick Info" see "Quick Info" on Page 22.

Detailed information [McKinsey]	
<div style="display: flex; justify-content: space-between;"> General User Billing Rates Keywords Security </div>	
Company/Project	Office:
1 / 114	Headoffice
Start date:	Responsible:
1/24/2010	John Lance
Language:	Status:
English	Active
Description:	
Filing: <input type="text"/> <input type="button" value="Apply..."/>	

User

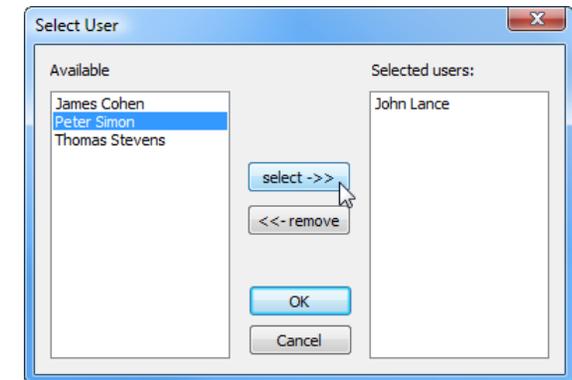
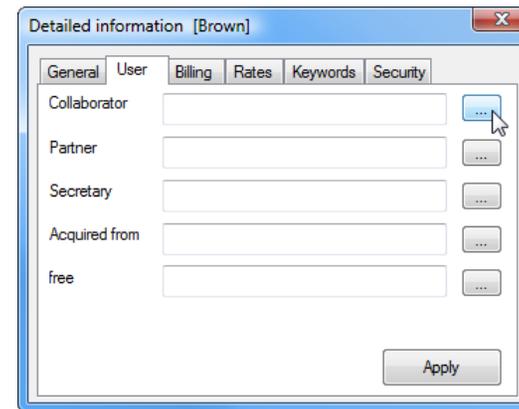
Registered users are allocated according to their functions in this project.

Assign Users:

1. Click on the button for selecting user [...] next to the field and the user selection window opens.
1. Select the desired user from the "available list" and click "select ->>" - the user is now added to the list of selected users. You can add as many users as you want.
2. Confirm with "OK" and "Apply".

Remove Users:

1. Click on the button for selecting user [...] next to the field and the user selection window opens.
1. Select the desired user from the "available list" and click "<<- remove" - the user is now removed from the list of selected users.
2. Confirm with "OK" and "Apply"..



Keywords**Assign Keywords:**

Here you will see the keywords which are assigned to the selected project. Proceed as follows:

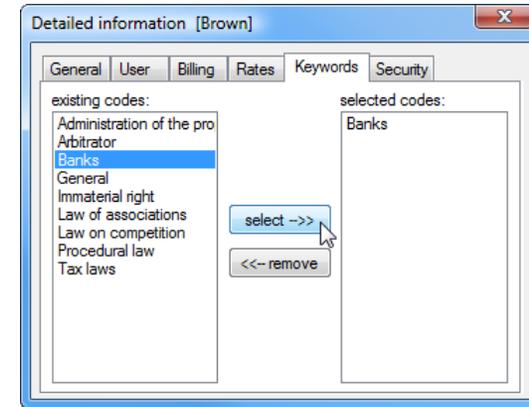
1. Select the desired keyword from the list of existing codes
2. Click on "select ->>"
3. The keyword will appear in the list of assigned codes.

The selected keyword is now assigned.

Remove Keywords:

1. Select the keyword from the list of assigned codes
2. Click on «<<- remove».
3. The keyword will be removed in the list of assigned codes.

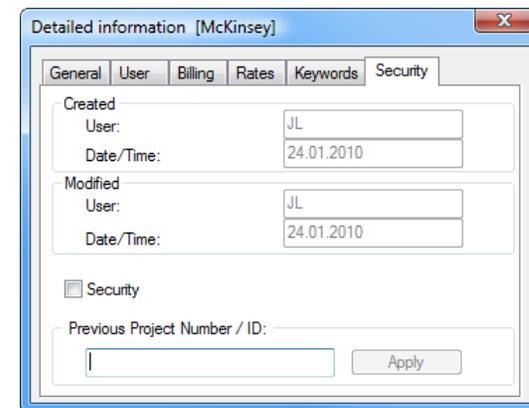
The definition of Keywords can not be changed here, please contact your administrator.

**Security**

Information about the project: Created and modified when and by whom.

If the check box "security" is activated, then project security is activated and you can change access for users etc. This can only be done by the project owner.

Project number before take-over: If data were taken on from other systems, e.g. the former project number could be entered here.





View



Quick Info



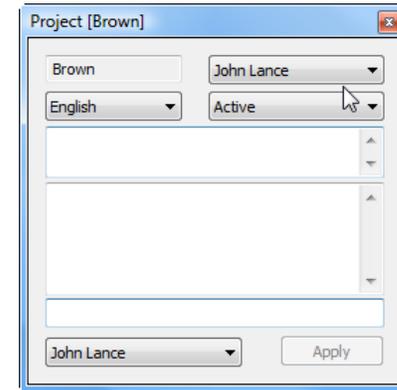
Quick Info Projekt:

The dialog will show you the most important information about the current project. The information comes from the master data / project properties. These can be edited here - the master data is updated automatically.

This dialog shows you the following informations:

- Project Name
- Responsible (eg Responsible partner / case owner / project manager)
- Project Language
- Project Status
- Project Description
- Info Field
- Filing Information
- Actual WinYou Law User = normally same as logged in user

See also "General" on Page 19



Summary

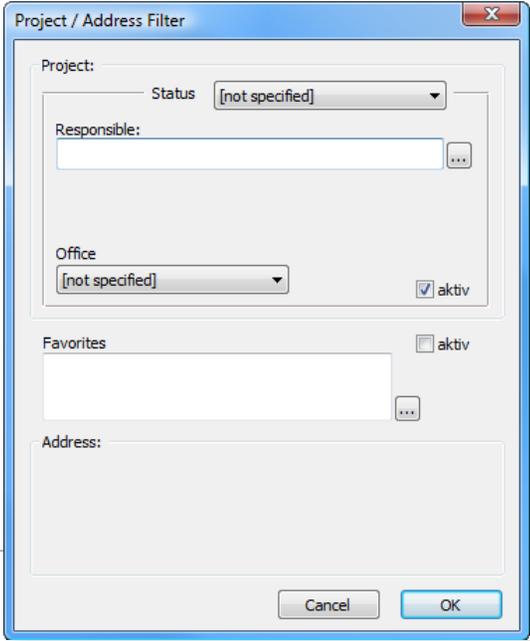
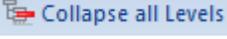


The window shows you a comprehensive cost / expense / payment information about the current project.

WIP (Work In Progress) and A/R (Accounts Receivable) shows the current balance of the project.

Info: The summary is always displayed in the currency of your database.

Type	Amount
Hours	3.40
Fees	680.00
Expenses w/o Flat Exp.	267.00
Sales Tax	0.00
Total Work in Progress	947.00
- Payments on Account	0.00
- Write Off	0.00
Work in Progress net	947.00
Invoiced	3,525.00
- Payments received	0.00
** WIP + A/R	4,472.00
Client's Account	0.00

<p>Filter</p> <p> Filter</p>	<p>Filter the Projects in the Project Explorer</p> <p>In the project explorer the user can set a personal filter. The user selects the criteria and the project lists are filtered accordingly. This means that he sees only those projects, which correspond to the selected criteria.</p> <p>All definitions except the Status field are cumulative.</p> <p>Set Filter</p> <p>Select the desired criteria for your filter:</p> <p>Status: It will show only projects that e.g. are active.</p> <p>Responsible: Only Projects with the selected user as responsible are displayed.</p> <p>Office: Only projects of the selected location will be shown.</p>	
<p>Refresh</p> <p> Refresh</p>	<p>The Project Explorer list will be refreshed (re-read from the database). This can also be done by using the F5 key.</p>	
<p>Expand all Levels</p> <p> Expand all Levels</p>	<p>Expand all levels in Project Explorer</p>	
<p>Collapse all Levels</p> <p> Collapse all Levels</p>	<p>Collapse all levels in the Project Explorer</p>	

Contacts / Addresses

Address Management

Our address administration has been conceived particularly for lawyers and their needs. Addresses are used in various contexts. Therefore it is important that they can be found and used easily. In WinYou Law the addresses are **entered only once** and used as Client/Matter/Case/File/Project related address, as link in the Client Relation Manager, in all documents, for mailings etc.

Contact Explorer

In the Address List all addresses (unless filtered) are listed alphabetically. Addresses with a plus-sign [+] have Contact Persons and / or Locations (Domicile Addresses). You see the Contact Persons / Locations by clicking on the plus-signs.

You can open the address details by a double click on the address in the address list. If there are links to contact persons and/or other domiciles, those are displayed under the selected address.

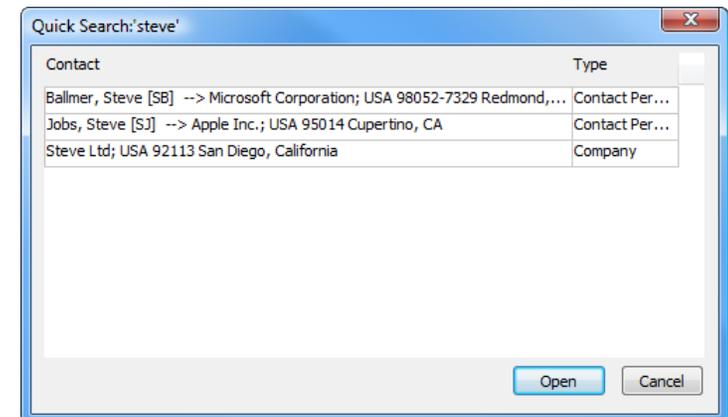
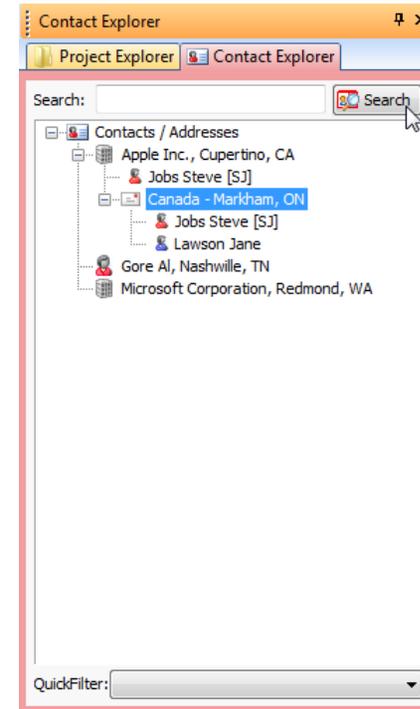
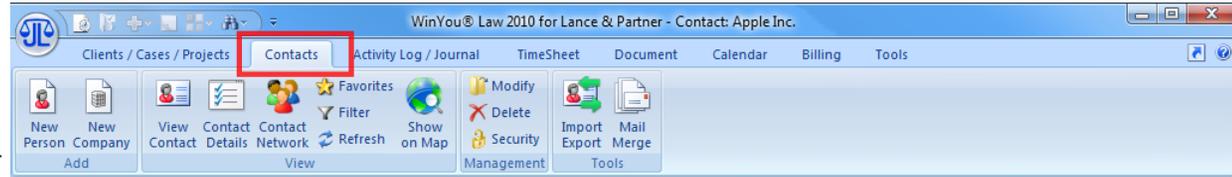
Search in Contact Explorer

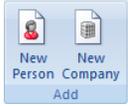
If you want to search in the Address list, you can type the first letters of the name of the Company or Person in the search field of the address list. The first address that corresponds to the search argument is selected. You can switch to the next corresponding entry with the **F3** key.

QuickSearch

Type the first letters of the Name or First name of the Contact Person or of the Company Name in the search field. Press the button "Search" on the right or press the F4 key. Now the entire database is searched and the result is displayed in the QuickSearch window.

Select the desired address and press the button "Open". It will be added to the address list, in bold type, opened and can now be edited normally. Those temporary, bold type addresses remain in the address list, until it is refreshed or the program is restarted.





Add

New Person

Select "New Person" or "New Company". WinYou Law opens an empty address window.

WinYou Law distinguishes between company and personal addresses. Select the appropriate type and the corresponding fields will be enabled / disabled.

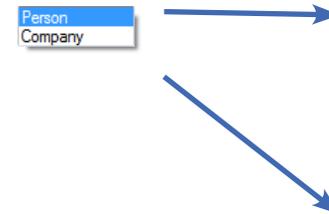
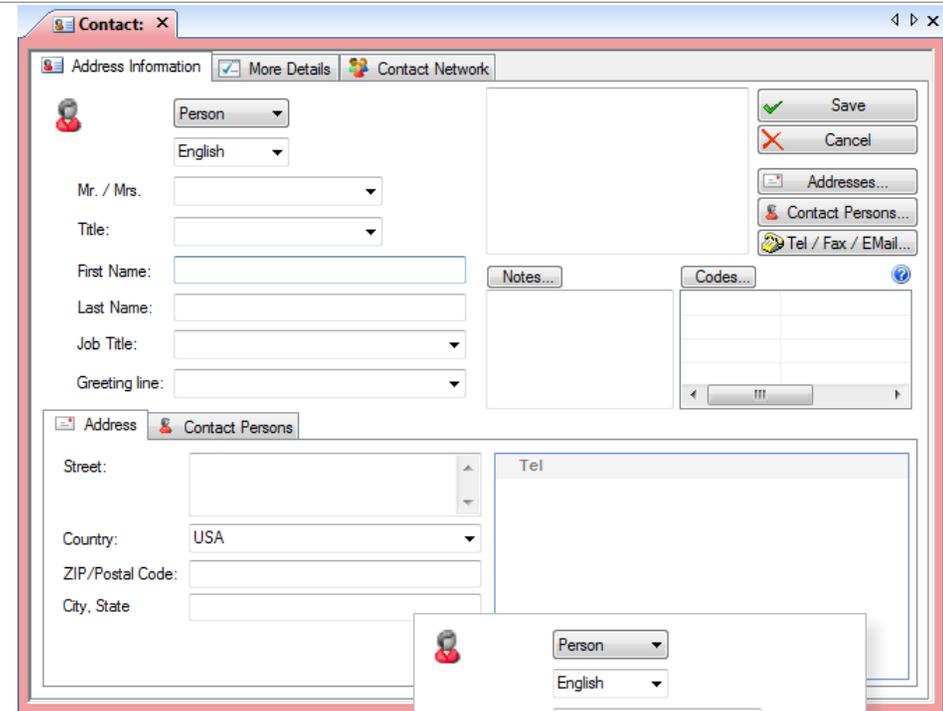
Use the tabulator key to switch to the next field. Fields like salutation will be created automatically, but you can change this at any time.

To create an address in a foreign language, you start by selecting the desired language. This will then be used for salutations, titles etc.

In some fields (salutation, title, greeting line) you can choose from a list or enter the data directly.



New Company



Person

English

Mr. / Mrs.

Title:

First Name: Al

Last Name: Gore

Job Title: Jr.

Greeting line: Dear Albert Gore

Company

English

Name:

Greeting line: Dear

Automatic check of duplicate Addresses

If WinYou Law finds a corresponding existing address in the database, a warning dialog will be shown. You can choose to continue or to use the existing one. Follow the instructions on the screen.

Automatic City / Zip / Postal Codes

If WinYou Law recognizes a postal code it will fill out the city/state field automatically. If the postal code corresponds to several Cities or areas, the window Select City is displayed. Select the desired entry and close with OK. If you know the name of the city, but not the zip code, type the name of the city (in the city field) and press the key combination Shift+Tab - the selection window for the zip codes is displayed.

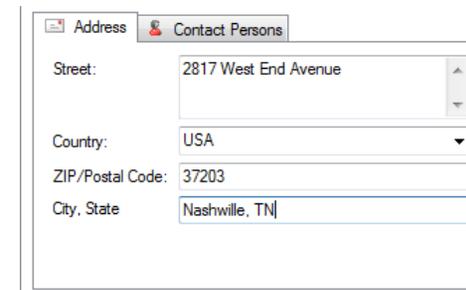
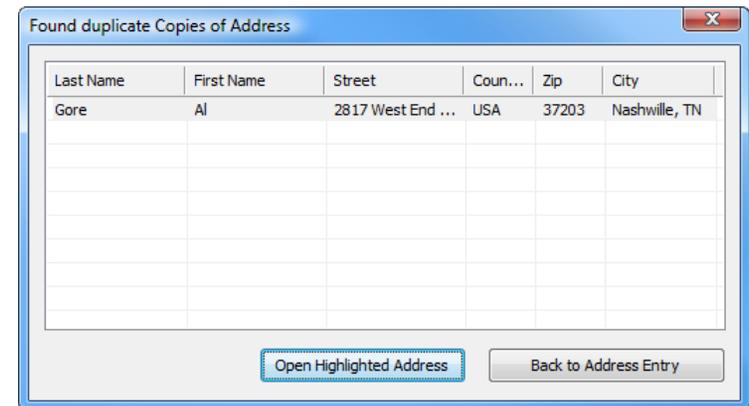
Address View

The current address view will be shown here.

If you have chosen a different country, the address view is automatically adjusted.

Notes

Switch to the Note field by pressing the tabulator key and type your notes/remarks concerning the company or person. Press button "Notes" to get a larger window.



Al Gore Jr.
2817 West End Avenue
Nashville, TN 37203

Codes

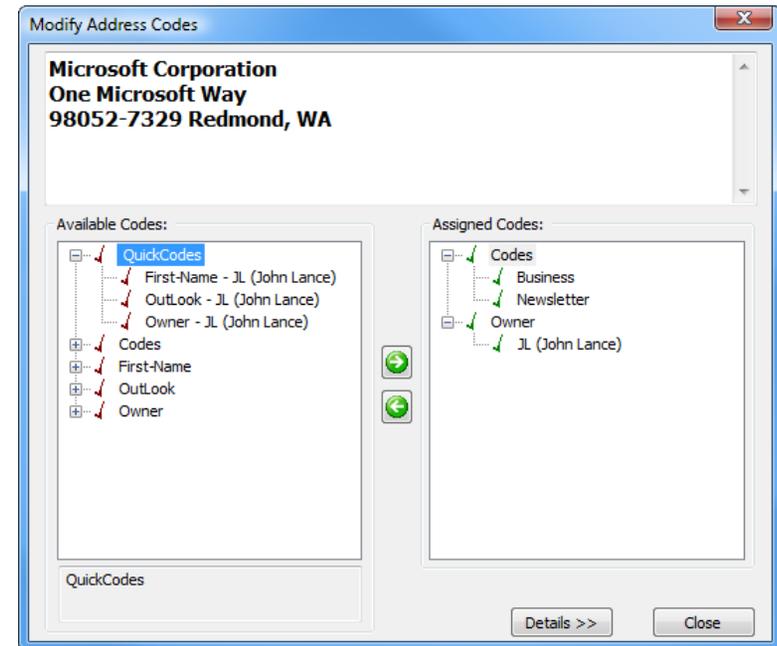
Depending on the focused entry (main address, location or contact person) you will always see the corresponding Codes in the Address Code window.

You can assign address codes to your address. Press the button "Address Codes" to get the specialized dialog.

The QuickCodes shows the available user codes for the actual login user. Click on the plus sign on the other codes to see the details.

Double Click on a code copies the code to the window with the assigned codes. You can also use the green buttons to insert or remove the codes.

Address codes can also be assigned to a single contact person. Double Click on the Contact Person, press button Address Codes in the Contact Person dialog.



Phone, Fax, Web and EMail

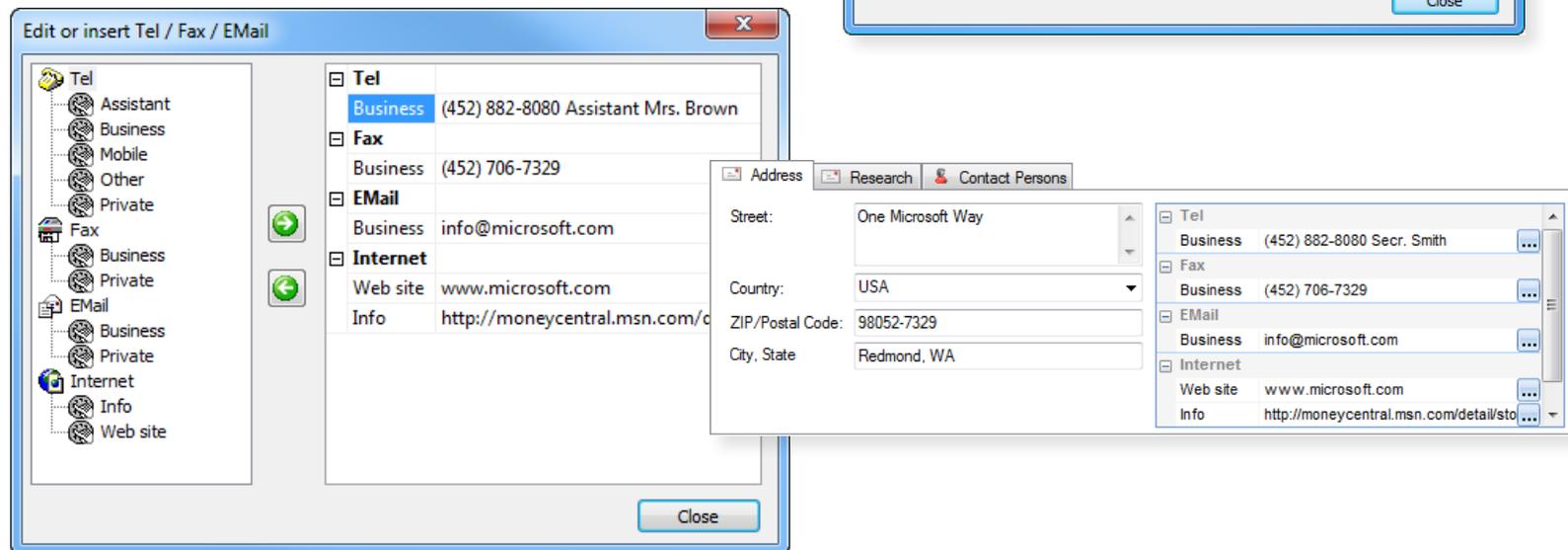
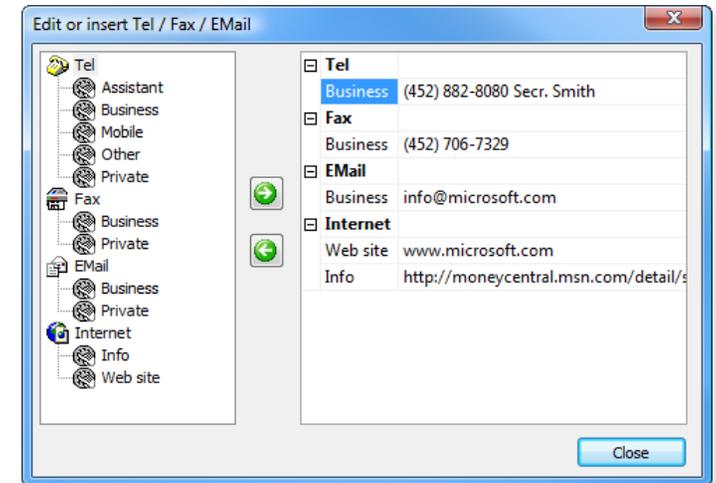
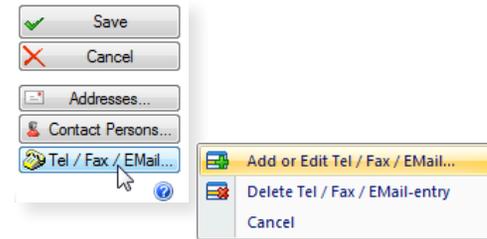
Depending on the focused entry (main address, location or contact person) you will always see the corresponding Tel/Fax/EMails in the Tel/Fax/EMail window.

Click on "Tel / Fax / EMail" button (or right click in the Tel/Fax/EMail Window to get the context menu). Select Add or Edit Tel/Fax/EMail to add some new entries.

The number of entries is not restricted. For example you can use the entry "Tel/Business" as many times as you wish.

WinYou Law also allows you to enter any remarks (type any text after the number).

You can also edit the data directly in the fields Tel / Fax / Email.



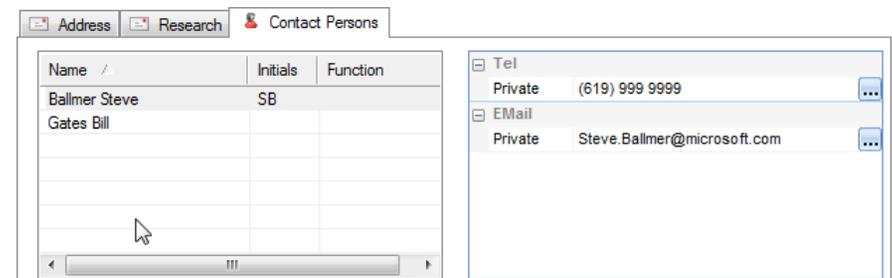
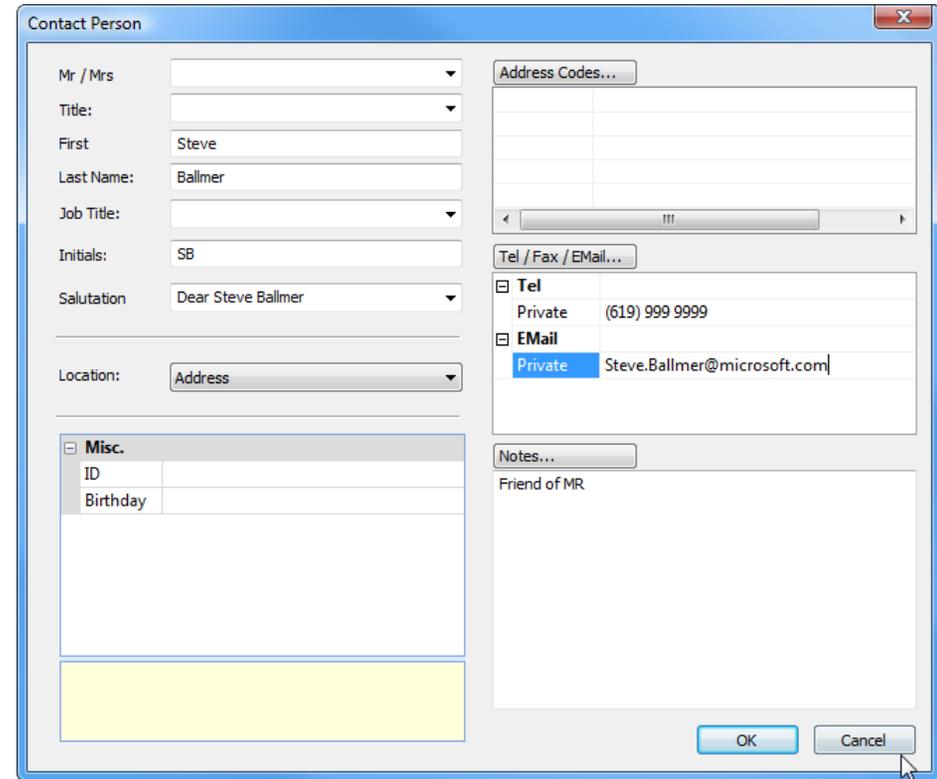
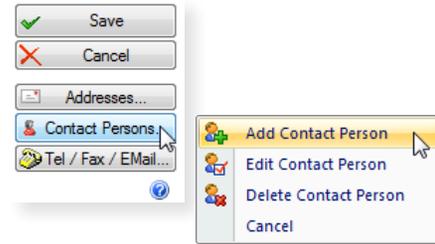
Contact Persons

Click on the "Contact Persons" button or Double Click on the Contact Person in the list and the Contact Person Dialog will show up. From the Contact Person Dialog you control every aspect of the Contact Person.

You can assign Address Codes, EMail, Telephone and Fax numbers as well as notes. Specially defined fields like Birthday etc. are also available.

You can assign individual address codes to every contact person.

You can even assign this contact person to a location, i.e. you will only see this contact person in context with this location in the address. A Contact Person that is assigned to a location will show up yellow in the Address List and you will only see the Contact Person under this Location. If the Contact Person is not assigned specially to a Location, this will be shown as a red icon in the Address List. This Contact Person can therefore be used in the Address of any Location (when creating a letter etc).



Locations (Sub Addresses)

You can have more locations (addresses) to one contact, like other offices / branches.

Select the desired address in the Address List. In the Address Window click on the button "Modify", click on button "Addresses...", select "New Location".

Modify or Delete a Location

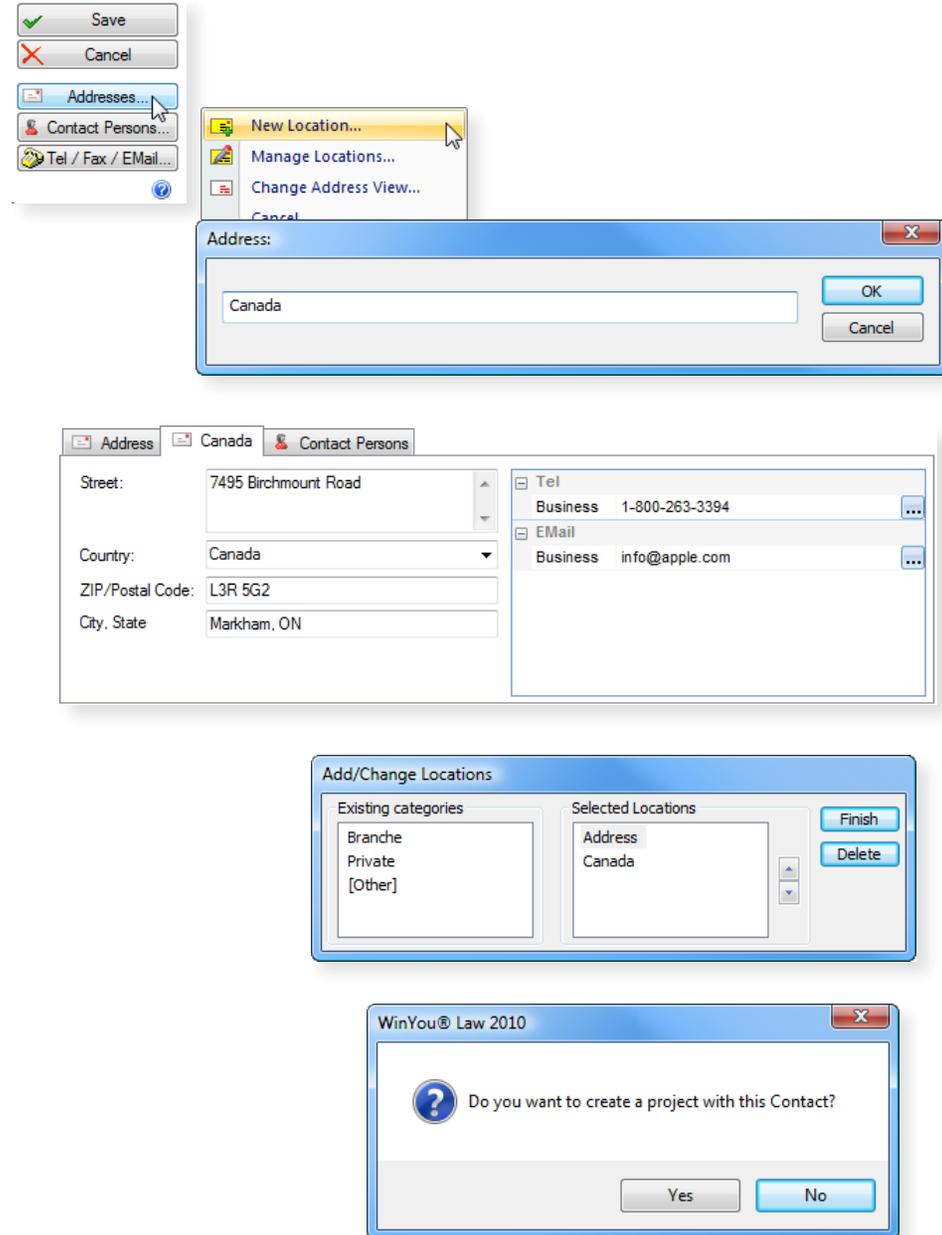
Select "Manage Locations...", then in Selected Locations click on the Location. Click another time, and an edit window will show up. Now you can change the Location name.

You can also change the order of the Locations. Select a Location, use the arrow buttons to move the Location up or down.

Automatically create a Project from the Address

WinYou Law can create a new Project based on the Address data when you save a new address. WinYou Law proposes the name/ first name or the company name and the city as project name. You can modify or just confirm the project name. The new project is immediately listed alphabetically in the project list and opened. In the Document Control Center the entered Address is automatically assigned to the new Project as a client address.

Click "No" if you want save only the address.



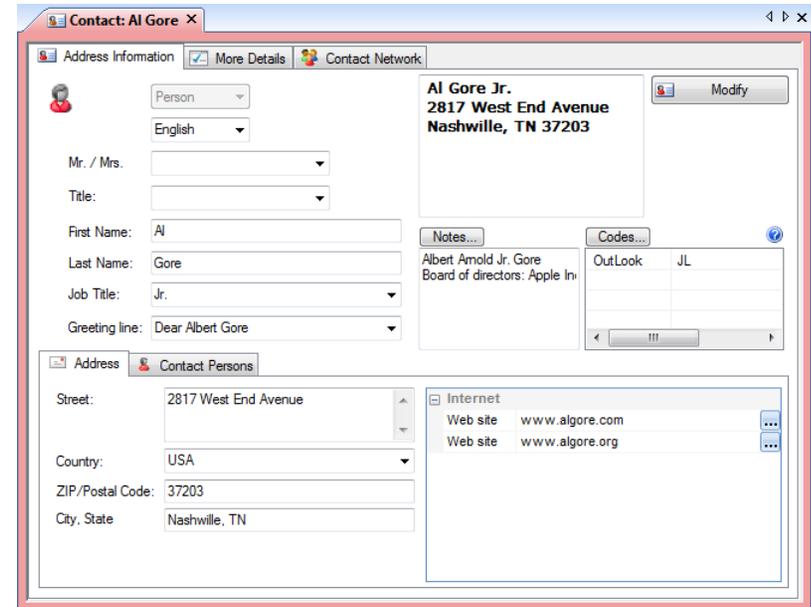


View



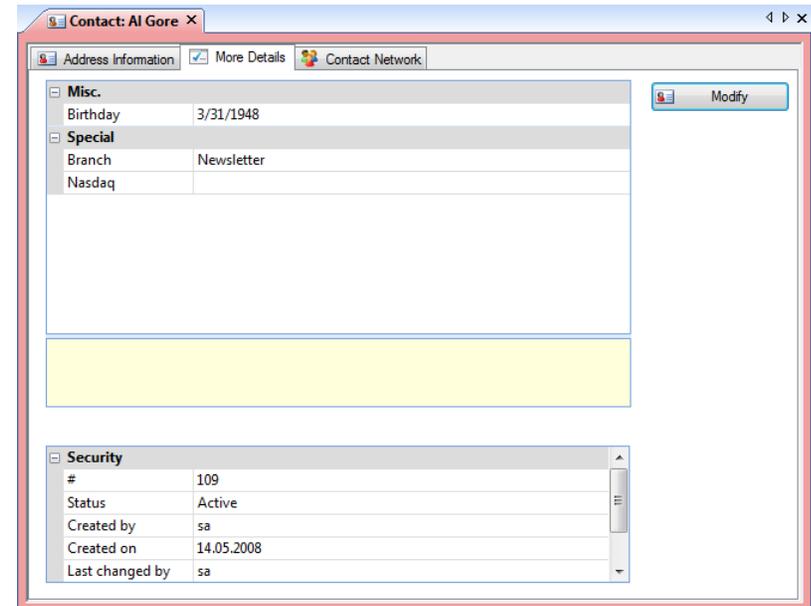
View Contact

Select the contact / address which you want to view.



Contact Details

The register "More Details" shows other details about this contact / address like birthday or branch codes etc. In the security fields you have the internal address number, status (can be changed to inactive address), who created this address and date, last changed by and date. This fields can be customized.

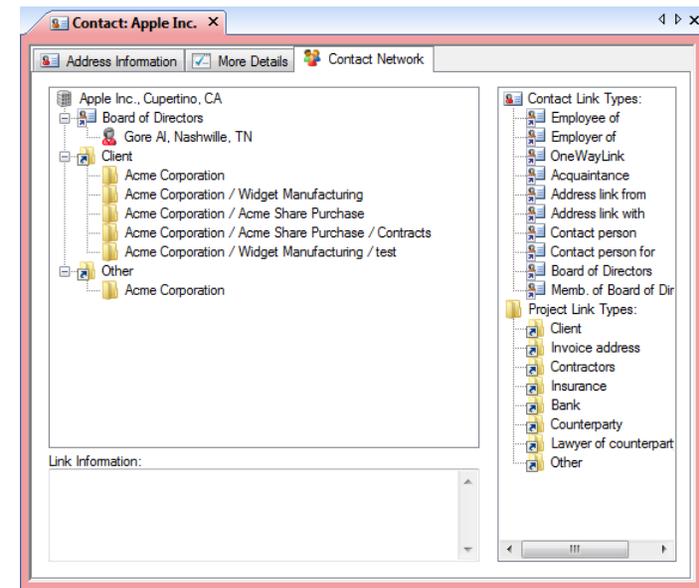


Contact Network



If you want to display the links of an address, select the desired address in the address list and click on the button "Contact Network" (or on the tab in the address view). The Address Network / Client Relation Manager offers you a comfortable graphic overview over the relations between addresses and Projects/Clients/Cases/Matters. This can be an Address to Project or an Address to Address link.

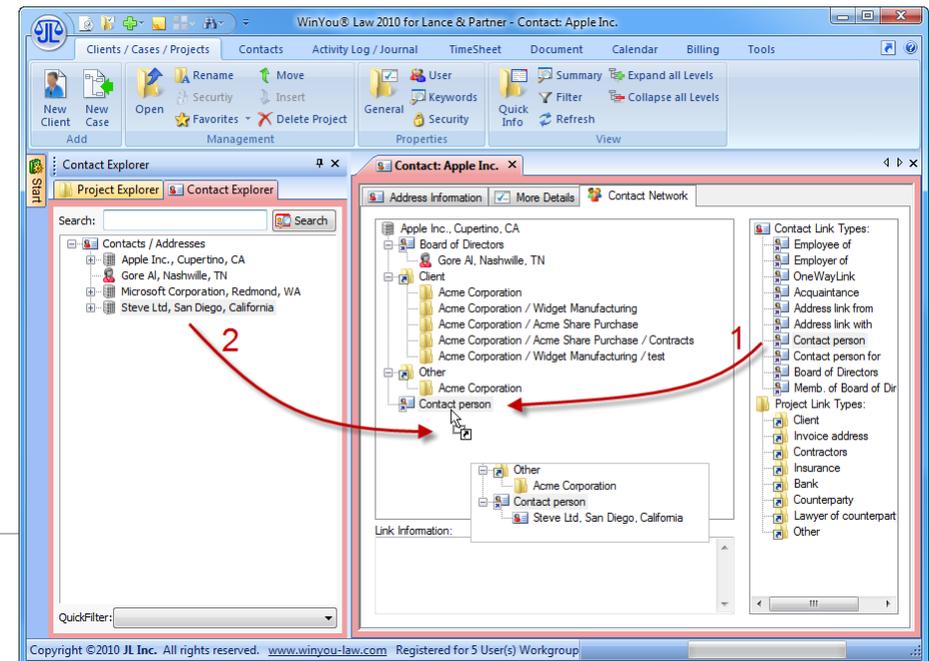
Project related addresses are automatically listed in the Client Relation Manager with their links.



Create additional links:

1. Double click on the contact / address in the Contact Explorer where you want to create a link. This contact is shown on top.
2. Select the type of link in the field Type of Links, e.g. "Employer of" and double click it. The link type is now automatically assigned.
3. Select the address/project you want to associate in the address/project explorer and Drag & Drop to the created link (e.g. "Collaborator of")

The definition "type of links" can be customized, check with your Administrator.



Favorites



Filter**Apply Filters on the Address Lists**

You can create personal filters for the address lists. The user determines the criteria and the project and address list are filtered as defined. This means, that only the project and addresses that correspond to the selected criteria are listed.

Info: All criteria are cumulative, except the Status.

Project / Address Filter

Project:

Status [not specified]

Responsible:

Office [not specified] aktiv

Favorites aktiv

Address:

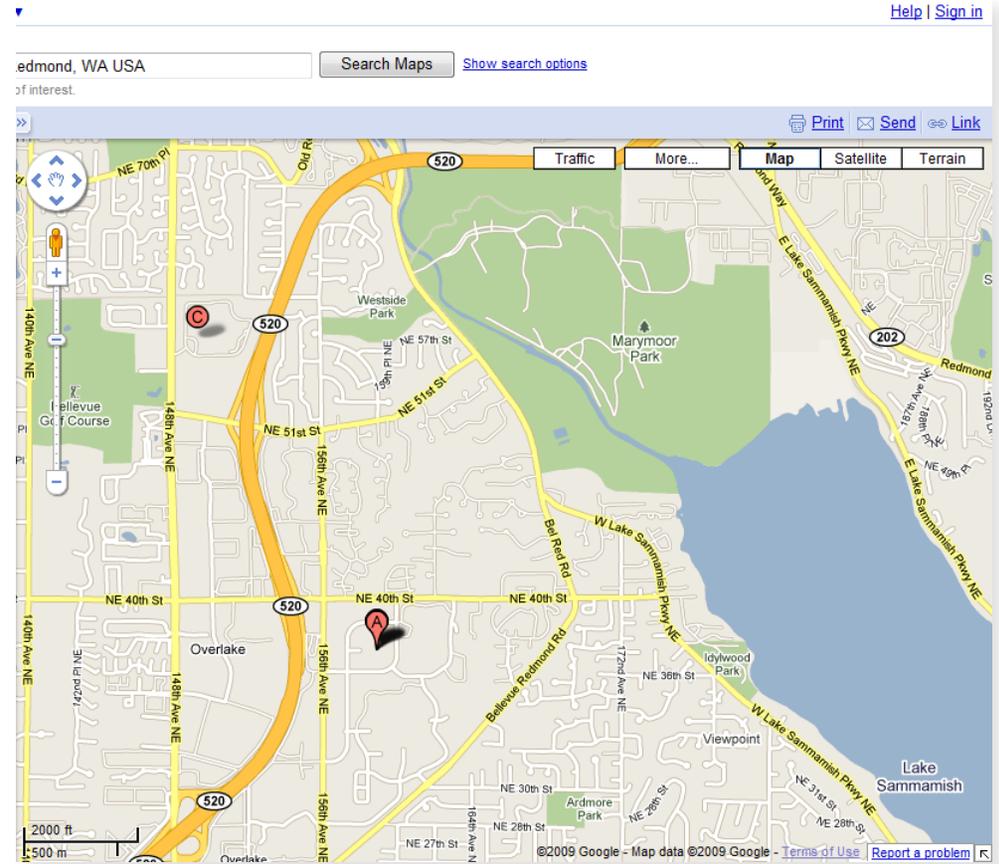
Cancel OK

Refresh

The Contact Explorer list will be refreshed (re-read from the database). This can also be done by using the F5 key.

Show on Map

Clicking this button will display for the address on Google Maps. The map display can be customized, please contact your Administrator

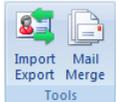




Management



<p>Modify</p> 	<p>Click here to modify the selected Contact / Address.</p>
<p>Delete</p> 	<p>Delete selected Contact / Address.</p>
<p>Security</p> 	<p>Here, you can display all the information about who has created this Contact / Address and who has modified it last.</p>



Tools

<p>Import / Export</p> 	<p>Import / Export "Import and Export" on page 135</p>
<p>Mail Merge</p> 	<p>Mail / Merge</p>

Log / Journal

Introduction

All Activities (like Fees, Documents etc.) for the opened project are displayed in the Project Activity Log / Journal (electronic dossier). All Activity Log-entries are registered here - all with the same procedure!

To open an Activity Log entry, you can double click it or right click in the Activity Log and select Modify / Open from the context menu.

You can display the detailed information about a project and its properties with a mouse click. In the detailed project information you can define the basic data, e.g. Project language, Office, Users and their functions (e.g. project manager) and project specific rates, VAT or Sales Tax, Keywords etc. The client address with all the accompanying information is directly visible in the Activity Log.

You can customize these views yourself and make windows and columns invisible / visible or dissemble and group differently.

Date	Type	Info	O...	Text
10/10/2009	Notes		JL	Lunch with Brown
3/4/2010	Deadline		JL	Draft Contract
1/29/2010	Task		JL	Tel Mr Brown
1/19/2010	DocVersions	Ver. 2 L0000144.doc	JL	Contract
1/19/2010	Document	X0000141.pdf	JL	2010-01-14
10/10/2009	3.40 hrs	680.00	JL	Contract
10/9/2009	Appointment	09:00	JL	Directors meeting
10/5/2009	Travel expens...	200.00	JL	Contract
10/5/2009	Phone calls	67.00	JL	Contract
10/3/2009	Task		JL	Draft letter of intent
9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged fr...
9/3/2009	Notes		JL	Telephone Call with Mr. Rilman
8/31/2009	Bill	3525.00 R1000136.d...	JL	Bill #136 (Bill generated as a word document)
8/15/2009	Document	L0000139.doc	JL	Draft Contract (Document created in Word)

Sample Minimal:



Date	Type	Text
3/4/2010	Deadline	Draft Contract
1/29/2010	Task	Tel Mr Brown
1/19/2010	DocVersions	Contract
1/19/2010	Document	2010-01-14
10/10/2009	Notes	Lunch with Brown
10/10/2009	3.40 hrs	Contract
10/9/2009	Appointment	Directors meeting
10/5/2009	Travel expenses	Contract
10/5/2009	Phone calls	Contract
10/3/2009	Task	Draft letter of intent
9/17/2009	Email	Outlook Sent: Draft Contract (Email dragged from Outlook)
9/3/2009	Notes	Telephone Call with Mr. Rilman
8/31/2009	Bill	Bill #136 (Bill generated as a word document)
8/15/2009	Document	Draft Contract (Document created in Word)

Project Information

Here are all the most important project information such as project name, project properties, information boxes, address links, along with the display of address and telephone / email. Next to these windows we have a dynamic text search, filtering, and a button for quick add of entries.

On the right side, there are other functions such as filtering and view configuration. Just go with the mouse over it and the corresponding window opens. All these windows can be set individually.

Project Properties:

- Project Start Date
- Language
- Office / Location
- Responsible
- Project number
- Status

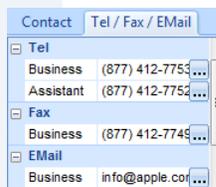
Contact and Address Links:

- Client Address
- Billing Address
- Contractors
- Counter party
- Lawyer of counter party
- Diverse

You can easily create links with drag and drop from the Contact Explorer. These link types are customizable.

Corresponding address and phone / fax / email or web links are immediately visible

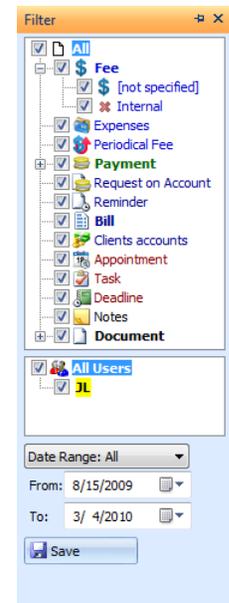
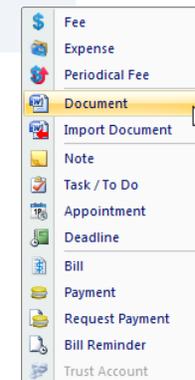
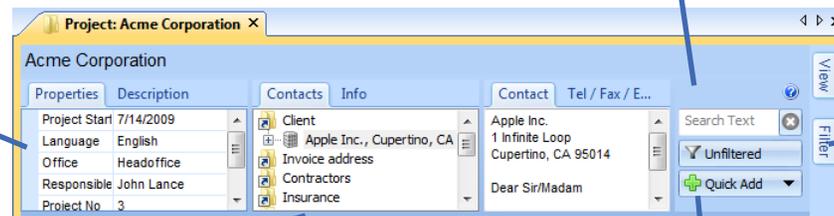
With the button to the right «[...]» you can make calls directly or create an email or start an internet browser with the web address



Dynamic Search in Journal / Log with "Search Text".

Filter entries in journal / log.

Quickly adding entries in journal / log



Columns in Activity Log / Journal

Typ and SubTyp

Example of symbols for documents:

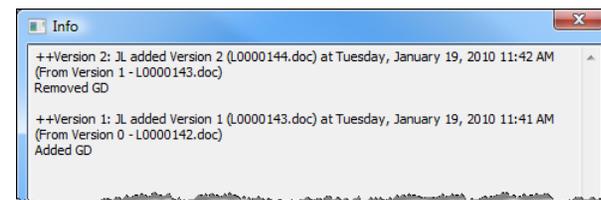
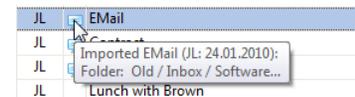
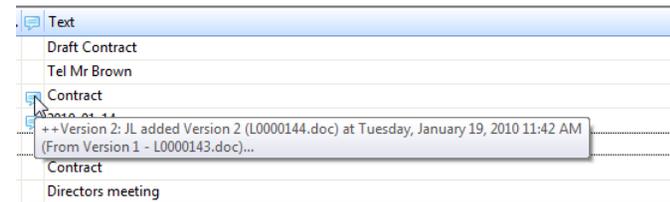
- Document
- Word Document
- PDF
- EMail
- etc.

The advantage of the 2 levels is that you can sort them, filter or group them.

Additional Information

When you point to this icon with the mouse, additional information like the content of the imported email attachment, or email, content notes, fees, etc. will be shown.

By double-clicking on the icon, a dialog appears with all the contents:



Priority:

- High
- Normal
- Low

Just click on the box by the entry in log, in which you want to change the priority, a selection will be displayed:

- Low
- Normal
- High

Select the appropriate priority.

The log list is sorted accordingly: entries with high priority appear first.

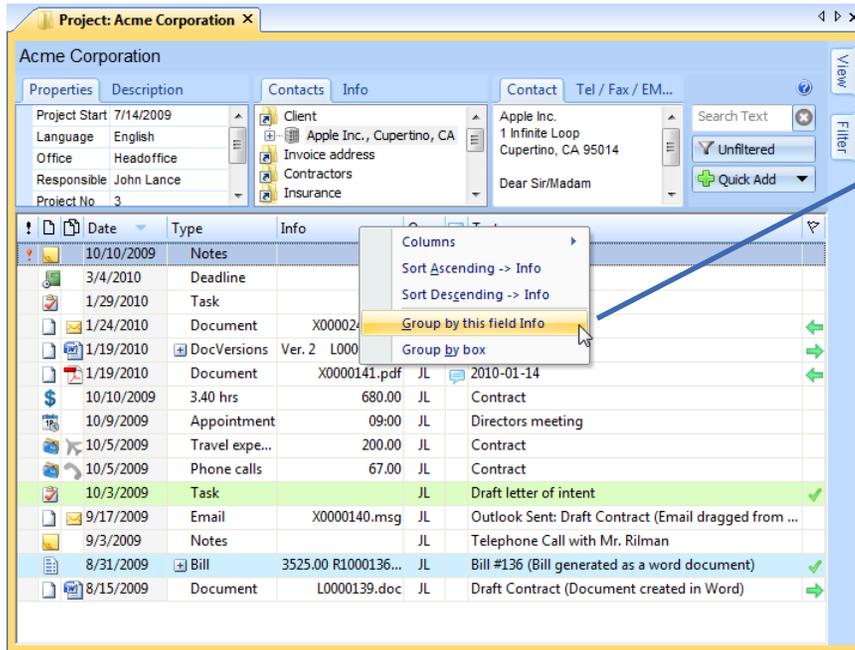
!	Date	Type	Info	O...	Text
?	10/10/2009	Notes		JL	Lunch with Brown
	3/4/2010	Deadline		JL	Draft Contract
	1/29/2010	Task		JL	Tel Mr Brown
	1/19/2010	DocVersions	Ver. 2 L0000144.doc	JL	Contract
	1/19/2010	Document	X0000141.pdf	JL	2010-01-14
	10/10/2009	3.40 hrs	680.00	JL	Contract
	10/9/2009	Appointme...	09:00	JL	Directors meeting
	10/5/2009	Travel expe...	200.00	JL	Contract
	10/5/2009	Phone calls	67.00	JL	Contract
	10/3/2009	Task		JL	Draft letter of intent
	9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged...
	9/3/2009	Notes		JL	Telephone Call with Mr. Rilman
	8/31/2009	Bill	3525.00 R1000136.docx	JL	Bill #136 (Bill generated as a word document)
	8/15/2009	Document	L0000139.doc	JL	Draft Contract (Document created in Word)

Flag: Shows:

- Document imported
- Document created in WinYou Law
- Fee billed
- Bill paid
- Task done etc.

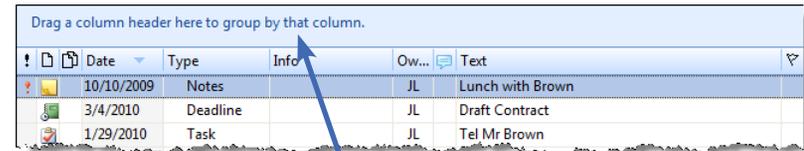
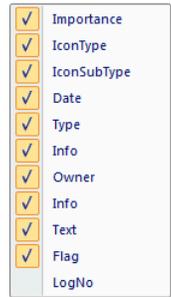
When you point to the icons with the mouse the relevant information will be shown.

Sorting and Grouping



When you right-click a title column, it displays the columns context menu:

- The column will, depending on whether with a check mark or not, be visible / invisible
- You can choose whether you want to sort or group by the selected column.
- Show the grouping field.

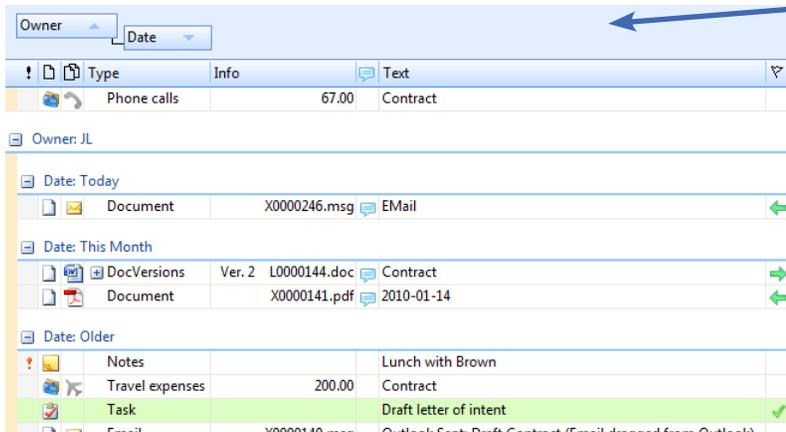


Grouping field:

You can drag the column title with drag and drop to the grouping field:

In the example below, we have the column heading "owner" as the first drawn into the grouping field, this is grouped by the initials of the owners.

In the second column, we have "date".



This makes the Activity log / Journal also a quick **analysis / reporting tool**. If you also use the filter function and / or the search, you will receive individualized, very comprehensive information!

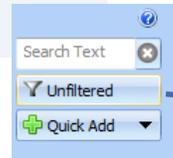
Of course, you can print out the result - see also "Print" on Page 65

You can save these settings, see also "View / Modify Preferences" on Page 42

Filtering

Click on the button «Filter»

The filter dialog is divided into type / subtype, owner and date



The button "Filtered" appears in orange when a filter is active.



TIP: Permanent Filter window

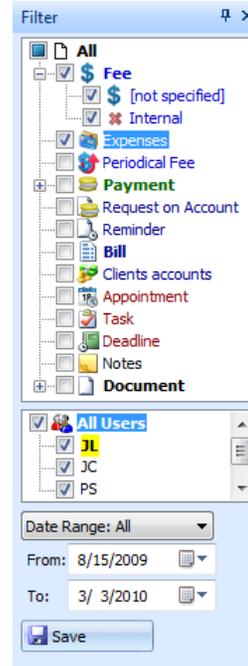
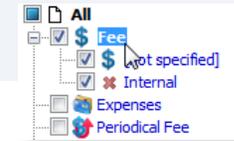
When you click on  the window is always kept open



Typ / Subtyp

Corresponds to the various log types and log subtypes

TIP: If you click on the text (after the icon) then only this will be selected.



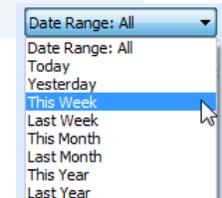
Owners (Users)

All users who have made an entry in this activity log / journal will be shown here.

Date

Here the date is automatically displayed: the date of the oldest entry to the latest entry date.

Use the button "Date Range" to make a quick selection.



!	Date	Type	Info	Ow...	Text
\$	10/10/2009	3.40 hrs	748.00	JC	Contract
✈	10/5/2009	Travel expenses	200.00	JL	Contract
☎	10/5/2009	Phone calls	67.00	JC	Contract

Text Search in Activity Log / Journal

Enter Search Text (either initials or a word / word fragment) in the "search text" field

After each letter, the messages in the activity log / journal are immediately filtered, ie only entries which contain these letters are shown.

All columns are searched.

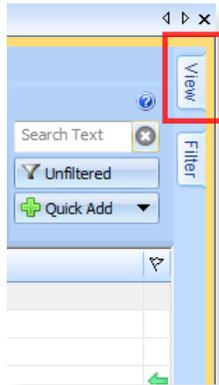


A search dialog box with a search input field containing the text "broj". Below the input field are two buttons: "Unfiltered" and "Quick Add".

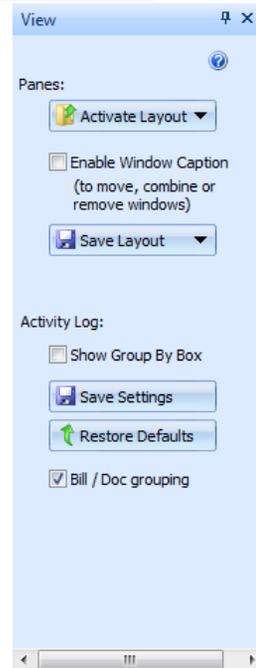


	Date	Type	Info	Ow...	Text
10/10/2009	Notes		JL	Lunch with Brown	
1/27/2010	Task		JC	Tel Mr Brown	

View / Modify Preferences



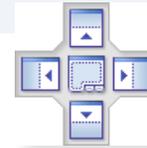
Click on "view" or just move the mouse over it:
The "view" window opens.



Window layout within the activity log / journal:

You can save or enable different layouts. Select "Windows Caption" to move the window, group or to delete them.

TIP: Use the "button dock": If you start to move a window, it appears automatically.



Layout of the activity log / journal table:

Here you can save your own layout or restore the original ones.

Properties	
Project Start	7/14/2009
Language	English
Office	Headoffice
Responsible:	John Lance
Project No	3

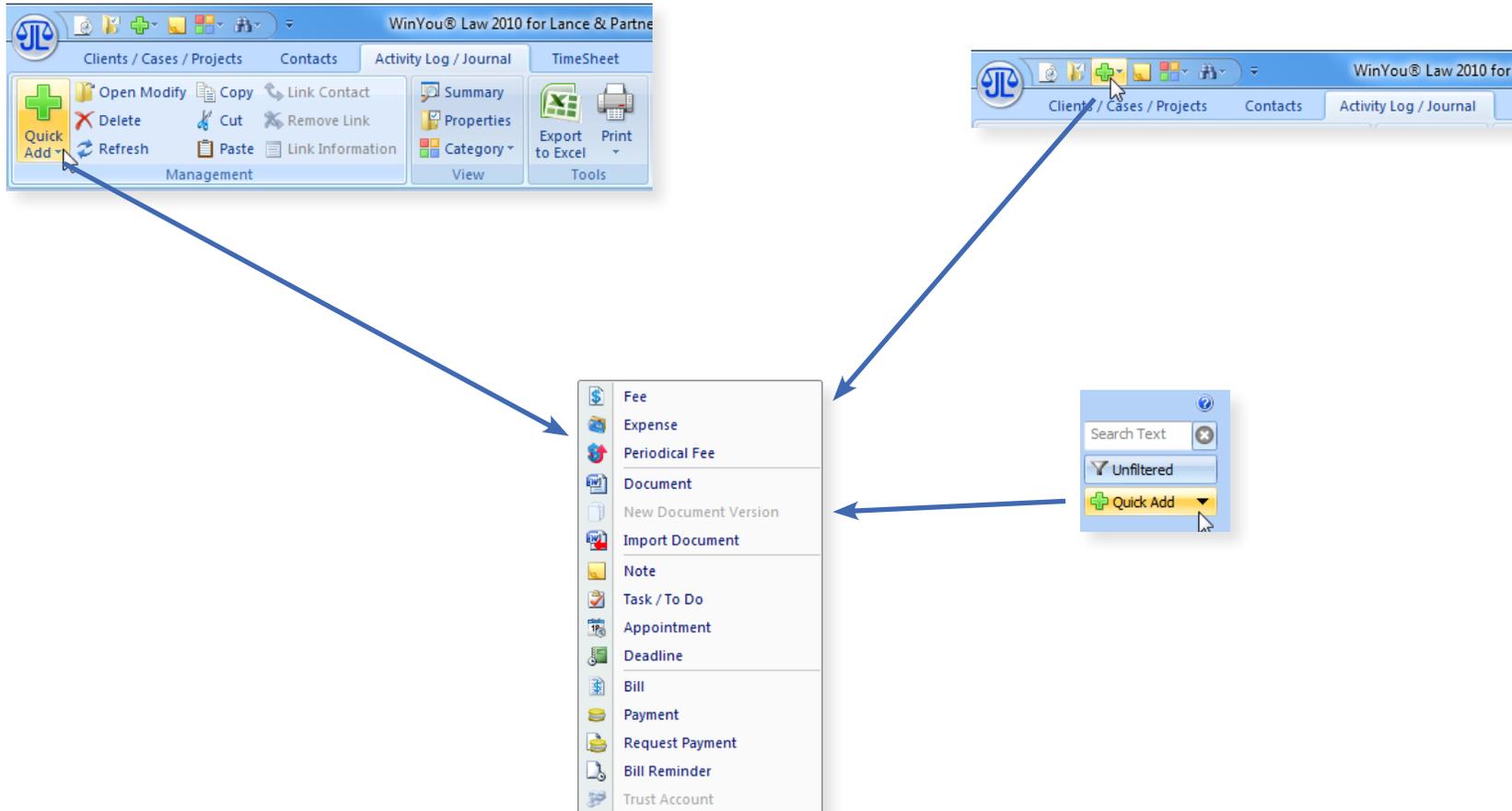
Properties	
Project Start	7/14/2009
Language	English
Office	Headoffice
Responsible:	John Lance
Project No	3
Status	Active



Quick Add

You can insert entries directly in the activity log / journal:

Click on "Quick Add"



\$ Fee

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- From:** You can enter a time period from
- To:** You can enter a time period to, or minutes
- Hours:** Here you can enter the time in decimal hours (0.5 = 30 minutes)
- Type:** If there are various types of fees you can select the desired type here.
- Rate:** Can be modified for an entry. Standard display is the hourly rate of the current User or Project.
- Total:** Is calculated automatically according to the time period and the rate. Can be overwritten. You can also enter a flat fee without hours or a time period.
- Sales Tax:** Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.
- Text:** The corresponding text. You can use text shortcuts.
- Internal use:** Internal text, will not be shown on the bill

The screenshot shows the 'Fee' dialog box with the following values:

- Date: 1/24/2010
- User: John Lance
- From: 00:00
- To: 00:00
- Hours: 0.00
- Type: [not specified]
- Rate: 350.00
- Total: 0.00
- Sales Tax: [not specified]

- \$ Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account

- If you want to enter several fee entries in a row, press SHIFT while closing with the OK-button. The fee entry is saved and a new Activity Log Fee entry dialog is opened.
- You can enter fees and expenses in the Timesheet.

Expenses

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Expense:** Select the type of expense you want to enter.
- Miles:** If you have selected travel expenses, type here the number of miles. The expenses total is automatically entered in the field Total.
- Number:** If you have selected Total Copies, you enter the number of copies. The expense total is automatically entered in the field Amount.
- Amount:** Type here the total amount of the selected expense.
- Sales Tax:** Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.
- Text:** The corresponding text. You can use text shortcuts.

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account

You can enter fees and expenses in the Timesheet.

Periodical Fees

An overview over all periodical fees for this project will be shown.

Press "New..." to create a new entry.

From: Type the starting date.

To: Type the ending date.

Period: Select the desired periodicity.

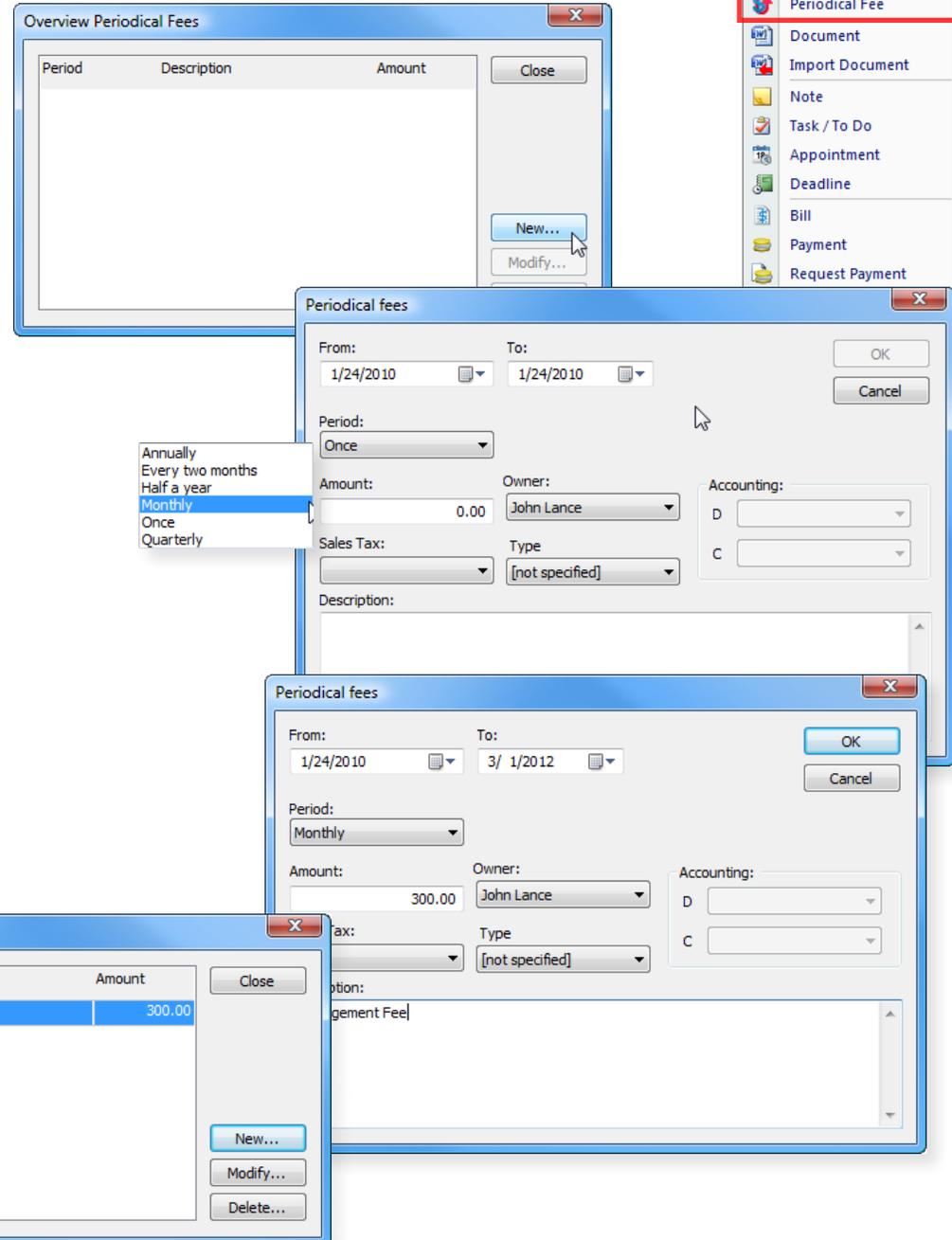
Amount: Type the amount you want to be invoiced.

Tax: Select the desired Sales Tax or VAT-rate with the arrow-key.

Owner: Select the desired user with the arrow-key.

Type: Select the desired type of periodical fee with the arrow-key.

Description: Enter the text to be displayed.



The screenshot illustrates the process of adding a new periodical fee. It shows three overlapping windows:

- Overview Periodical Fees:** A table with columns for Period, Description, and Amount. A 'New...' button is visible.
- Periodical fees (top):** A dialog box with a dropdown menu open for the 'Period' field. The menu options are: Annually, Every two months, Half a year, Monthly (highlighted), Once, and Quarterly. Other fields include From: 1/24/2010, To: 1/24/2010, Amount: 0.00, Owner: John Lance, and Accounting: D.
- Periodical fees (bottom):** A dialog box with the same fields as the top one, but with From: 1/24/2010, To: 3/ 1/2012, Period: Monthly, Amount: 300.00, and Description: Management Fee.

In the top right corner, a vertical menu lists various transaction types, with 'Periodical Fee' highlighted in red.

Close with the "OK" button - and, in the following window, with Close.

This periodical fees will show up automatically in the corresponding Billing

Document

Create Document

WinYou Law changes to the document control center:

1. Select a document template

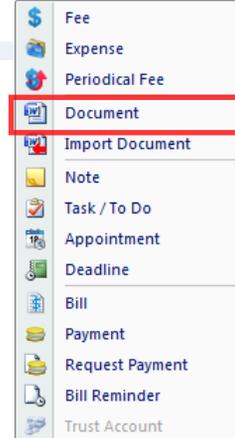
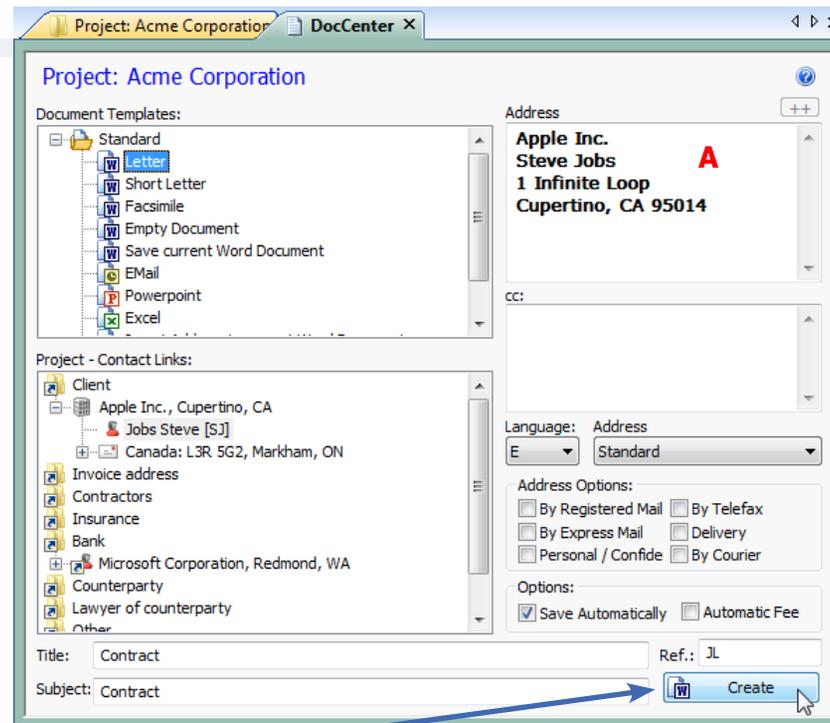
2. Select a Contact / Address

Select the Project Related Address (or in this case directly the Contact Person). In the Address window you will see how the Address will exactly be shown in the document. You can also drag a contact / address with the mouse from the Contact Explorer directly to the address window **A** (Drag & Drop)

3. Title / Subject

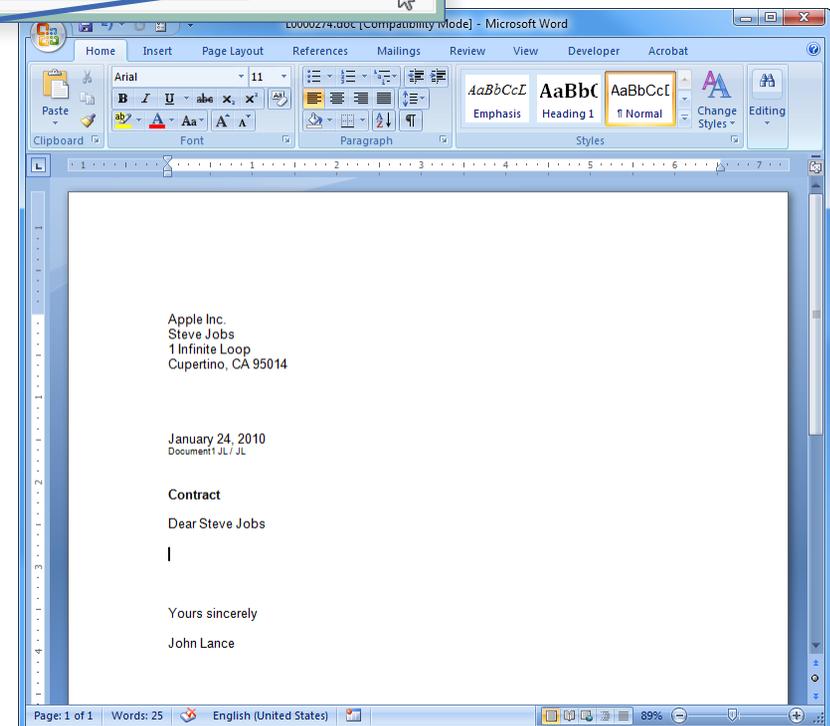
The Title will be shown in the Activity Log Document Entry for the project. The Subject will be shown in the document.

4. Click on the button «Create»



- Word opens with the corresponding template as a new document
- All bookmarks in the template are filled in (address, subject etc.)
- The document is saved automatically
- It adds a corresponding entry in the activity log / journal
- If the «Automatic Fee» is enabled, a fee will be generated automatically

See also "Create Document" on Page 75

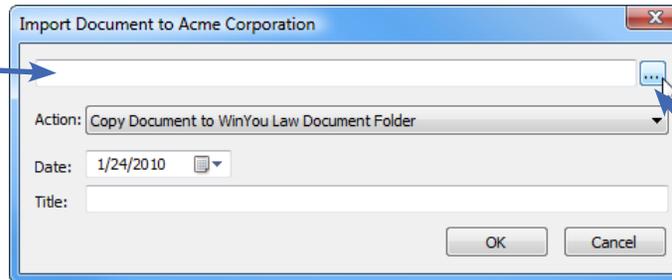
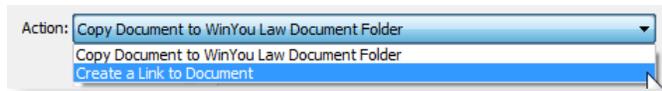


External Document (Import/Link)

Import or link a Document in WinYou Law

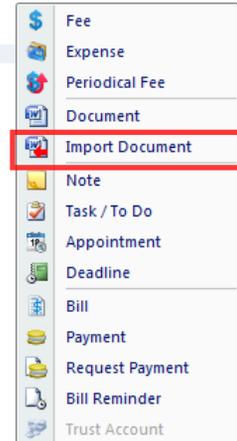
You have different possibilities to import an external document (or link):

- Import via Dialog



- With Drag & Drop directly in activity log / journal window (from an email, email attachment, windows explorer, desktop etc.)

- Using the "Copy" / "Paste" Buttons see also "Copy" on Page 59



Select the external document

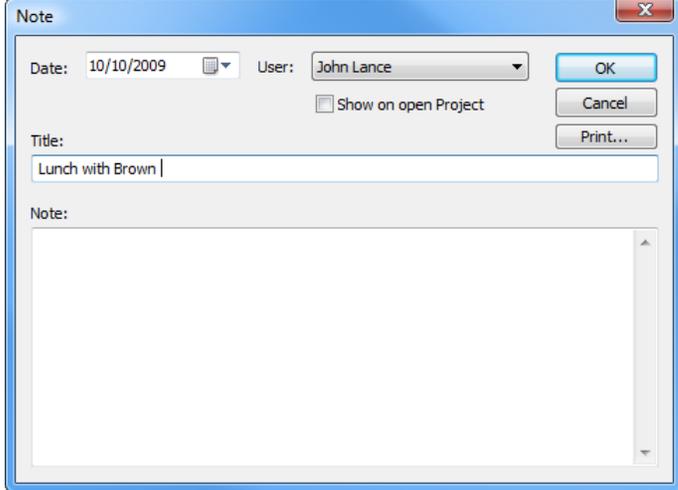




Note

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Title:** Enter the title that will be displayed in the Activity Log.
- Note:** You can enter as much text as you like. You can use Text Shortcuts (AutoCorrect)

When opening the project, the note may appear as a **warning message** when the button "Show when opening the project" is enabled.



Note

Date: 10/10/2009 User: John Lance

Show on open Project

Title: Lunch with Brown

Note:

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note**
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account



Task / ToDo

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Reminder:** Enter the number of days. During this period the Activity Log entry is displayed in a warning color.
- Done:** Activate check box, when the task is finished – color display in the Activity Log changes automatically.
- Note:** Enter here as much text as you like. This text will be displayed in the Activity Log.
- Outlook** If checked then task is automatically entered in Outlook.

Task / To Do

Start Date: 1/27/2010 Owner: James Cohen OK

Reminder: 1 Days before Completed Cancel

Subject / Notes: Outlook

Tel Mr Brown

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do**
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account



Appointment

Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Subject: Subject

Location: Location

Time: Time of the appointment.

Completed: Activate the check box, when the appointment is done the display color in the Activity Log changes automatically.

Reminder: Activate the check box, if you want to be reminded of the appointment.

Hours Enter here how long before the appointment you want to (before app.): be reminded.

Note: Enter here as much text as you like.

Category: Category.

Show as: Show as in Calendar: (Free, Tentative, Busy, Out of Office).

Outlook If checked then appointment is automatically entered in Outlook.

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account

X
Appointment

Date:	10/ 9/2009	Owner:	James Cohen	OK
Subject:	Directors meeting			
Location:				
Time:	09:00 - 10:00	<input type="checkbox"/> Reminder	00:00 Hours before.	<input type="checkbox"/> Completed
Category:		Show as:	Free	<input type="checkbox"/> Outlook

Cancel



Deadline

Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

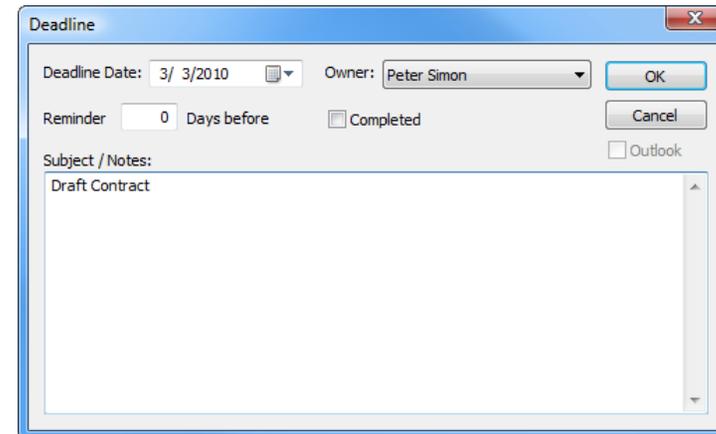
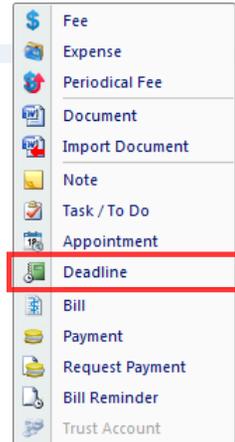
User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Activity Log entry is displayed in a warning color.

Done: Activate check box, when the deadline is finished – color display in the Activity Log changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Activity Log.

Outlook If checked then deadline is automatically entered in Outlook.

A dialog box titled 'Deadline' with a close button (X) in the top right corner. It contains the following fields and controls:

- Deadline Date: 3/ 3/2010 (with a small calendar icon)
- Owner: Peter Simon (dropdown menu)
- OK button
- Reminder: 0 Days before
- Completed checkbox (unchecked)
- Cancel button
- Outlook checkbox (unchecked)
- Subject / Notes: Draft Contract (text area)

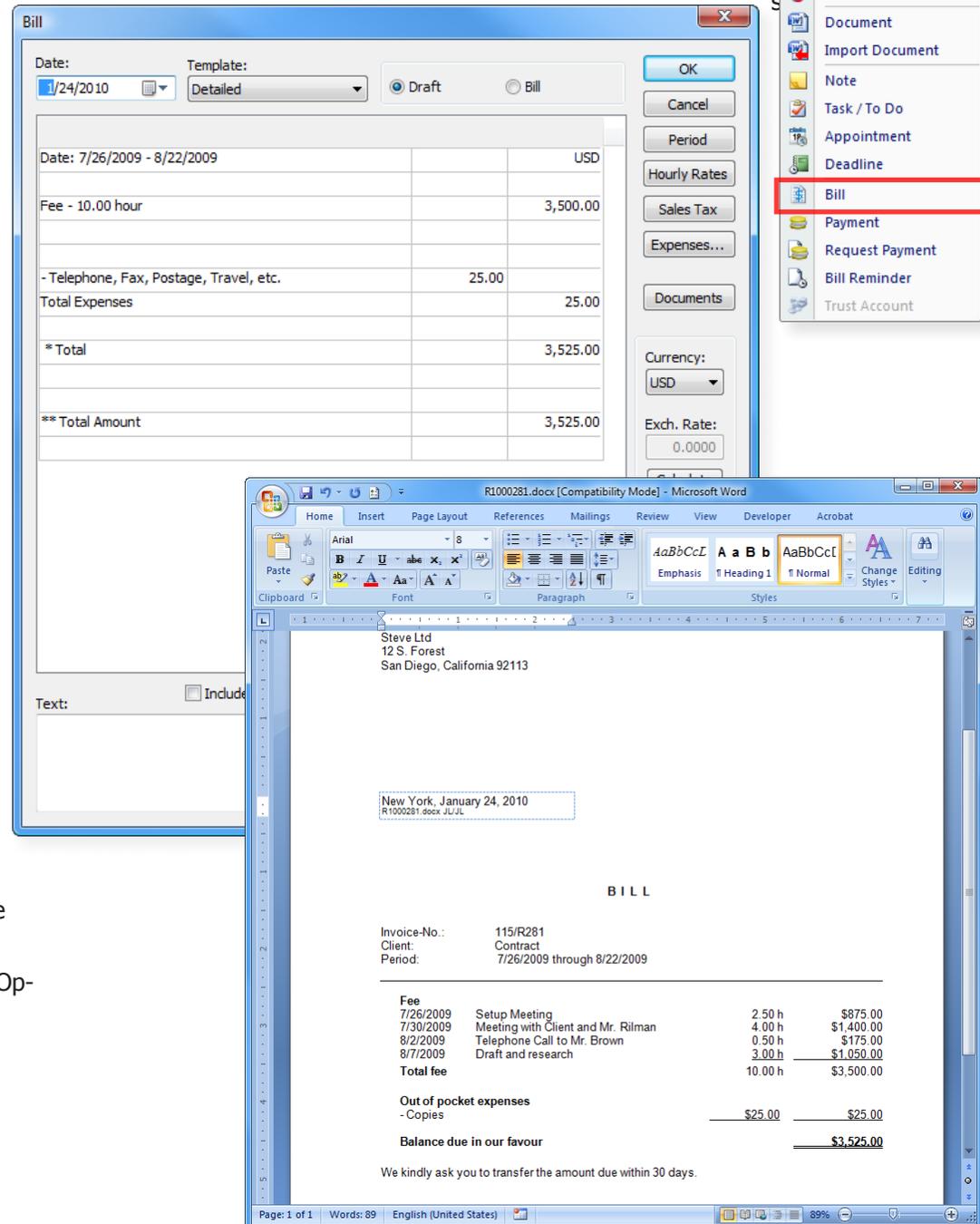


Bill

The program switches automatically to the Invoice overview. This overview shows open work, expenses and advance payments entries.

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- Template:** Select the invoice template you want to apply. The standard template, that was chosen for this project, will automatically be displayed
- Draft / Bill:** Select between Draft and final Bill. The Draft Bill selection creates a document in Word without saving it. The Word document for a definite Bill is saved in the project.
- PERIOD:** In this field you can define the period during which the work is billed.
- RATES:** Overview of the persons, who have registered work, including the rates and the totals. You can modify the rates and the amounts.
- TAX:** In this field you can adapt the Sales Tax or VAT rate for this invoice.
- EXPENSES:** Enter the expenses total per type of expense.
- DOCUMENTS:** Show all documents of an existing bill.
- CURRENCY:** Change the currency (Optional)
- EXCHG RATE:** Change the currency rate (Optional)
- CALCULATE:** If you press this button, the system calculates the new amounts and displays them automatically.
- Text:** Enter here an individual Activity Log text.
- Include non billable hour:** Activate the check box if you want the non-billable hours to be displayed.
- Interim Bill:** Activate the check box if you want to create an Interim Bill (Option.)

See also "Final" on Page 98



The image shows two overlapping windows. The top window is the 'Bill' dialog box, and the bottom window is a Microsoft Word document titled 'R1000281.docx [Compatibility Mode] - Microsoft Word'.

Bill Dialog Box:

- Date: 1/24/2010
- Template: Detailed
- Radio buttons: Draft (selected), Bill
- Buttons: OK, Cancel, Period, Hourly Rates, Sales Tax, Expenses..., Documents
- Table:

Date:	7/26/2009 - 8/22/2009	USD
Fee - 10.00 hour		3,500.00
- Telephone, Fax, Postage, Travel, etc.	25.00	
Total Expenses		25.00
* Total		3,525.00
** Total Amount		3,525.00
- Currency: USD
- Exch. Rate: 0.0000

Microsoft Word Document:

Steve Ltd
12 S. Forest
San Diego, California 92113

New York, January 24, 2010
R1000281.docx JL:JL

B I L L

Invoice-No.: 115/R281
Client: Contract
Period: 7/26/2009 through 8/22/2009

Fee			
7/26/2009	Setup Meeting	2.50 h	\$875.00
7/30/2009	Meeting with Client and Mr. Rilman	4.00 h	\$1,400.00
8/2/2009	Telephone Call to Mr. Brown	0.50 h	\$175.00
8/7/2009	Draft and research	3.00 h	\$1,050.00
Total fee		10.00 h	\$3,500.00
Out of pocket expenses			
- Copies		\$25.00	\$25.00
Balance due in our favour			\$3,525.00

We kindly ask you to transfer the amount due within 30 days.

Page: 1 of 1 Words: 89 English (United States) 89%

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill**
- Payment
- Request Payment
- Bill Reminder
- Trust Account



Payment

Payment, a Write Off or an Advance Payment

- Date** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- Type** Advance Payment / Payment / Write Off
- Open Invoices** A list of all open bills
- Currency** Actual currency of the project
- Amount** Amount

See also: "Payment on Bill" on Page 103

Payment

Date: 1/24/2010 Payment on account

Open Invoices:

Number	Date	Amount	Amount
281	24.01.2...	3,525.00	3,525.00

Accounting program

D

C

Currency: USD Exch. Rate: 0.0000 Amount: 0.00

Amount: 3.00 Inv. 0

Project:

Text:

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account

Advance Payment Request

- Date:** Select the desired Date. Standard display is today's date.
- Amount:** Insert the amount. If some work has already been recorded, a proposal is displayed. You can overwrite it.
- Tax:** Select the Tax-rate by clicking on the corresponding field.
- Text:** Enter in this field any text you want. You can use shortcuts.

The document is now created in Word and can be edited. It is saved automatically and registered in the project

Advance Payment Request

Date: 1/24/2010

Amount: 2,000.00

Sales Tax:

Text:

OK Cancel

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment**
- Bill Reminder
- Trust Account

KV000161.docx [Compatibility Mode] - Microsoft Word

Brown Ltd
123 Queen Street
Albany, New York 12345

November 15, 2007
KV000161.docx JS/JS

Brown

Dear Sir / Madam

We kindly ask you to transfer the amount described below as an advance payment towards anticipated legal cost

Advanced Payment CHF 500.00

Yours sincerely

Page: 1 of 1 Words: 51 English (United States) 89%

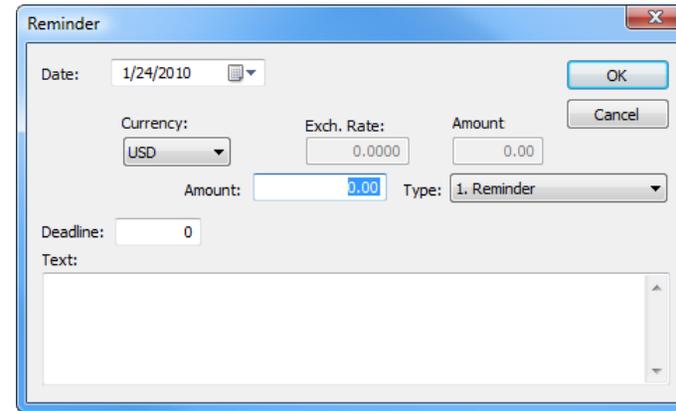


Bill Reminder

- Date:** Select the desired Date. Standard display is today's date.
- Amount:** Enter the amount.
- Type:** Select the type of reminder by clicking on the field and on the corresponding line (selection possible, if several types have been installed.)
- Deadline:** Insert the Deadline in the corresponding field.
- Text:** In the text field you can enter any text you want. You can use shortcuts.

The document is now created in Word and can be edited. It is automatically saved and registered in the project.

See also «Bill Reminder» on Page 105



Reminder

Date: 1/24/2010

Currency: USD Exch. Rate: 0.0000 Amount: 0.00

Amount: 0.00 Type: 1. Reminder

Deadline: 0

Text:

OK Cancel

-  Fee
-  Expense
-  Periodical Fee
-  Document
-  Import Document
-  Note
-  Task / To Do
-  Appointment
-  Deadline
-  Bill
-  Payment
-  Request Payment
-  **Bill Reminder**
-  Trust Account



Trust Account

Third Party Funds / Clients' Account Entry (option)

Date: Select the desired Date. Standard display is today's date.

Third Party: Select the currency– standard display is the project currency.

Funds: Enter the amount in the next field. Payment: If you want to enter a payment, you register the amount with a minus-sign in front, e.g. -10'000.00.

Text: In the text field you can enter any text you want. You can use shortcuts.

In the summary window you will always see the actual status

Payment on Invoice / Clients' Account for advance payments

Date: Select the desired Date. Standard display is today's date.

Third Party: Select the currency in the field Total Third Party funds

Funds: The amount is listed in this currency.

Text: In the text field you can enter any text you want. You can use shortcuts.

Amount: Enter the amount in the project currency, it will be automatically converted in the appropriate currency.
If you want to enter the amount in the foreign currency, press the field Currency Adjustment at the right of the field Amount.

Calculate: Enter the amount in the displayed currency and press the tabulator key. The amount will be automatically converted in the system currency and listed in the field Amount. Close with the OK-button.

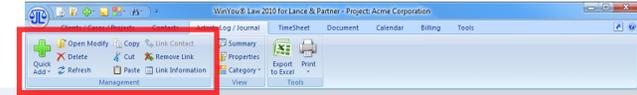
CREATE PAYMENT: Press the button «Create Payment»- the payment/advance payment is created automatically (see Payments «Payment on Bill» on Page 103)

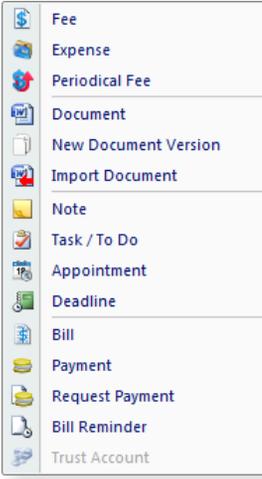
See also "Trust Account" on Page 106

- Fee
- Expense
- Periodical Fee
- Document
- Import Document
- Note
- Task / To Do
- Appointment
- Deadline
- Bill
- Payment
- Request Payment
- Bill Reminder
- Trust Account



Management



<p>Quick Add</p> 	<p>Quickly add an activity log entry</p> 
<p>Open Modify</p> 	<p>Modify / Open selected activity log entry</p>
<p>Delete</p> 	<p>Delete selected activity log entry</p>
<p>Refresh</p> 	<p>Refresh the activity log / journal (reread from database)</p>

Copy

Copy selected entry in activity log / journal to the windows clipboard

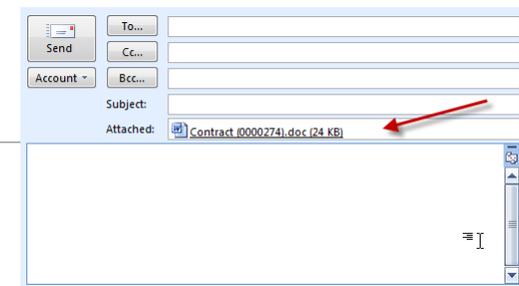
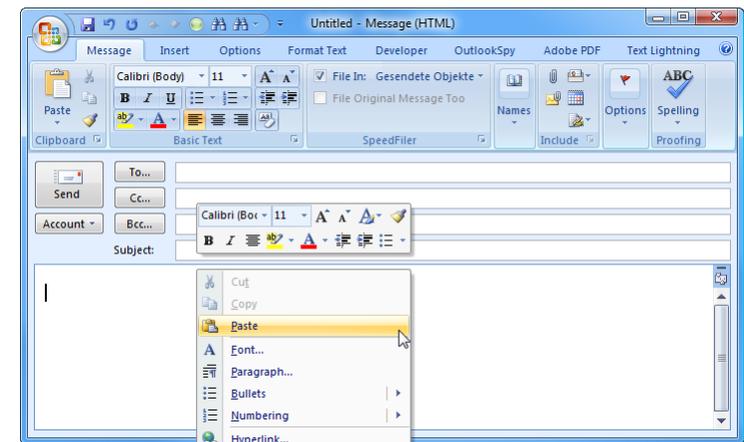
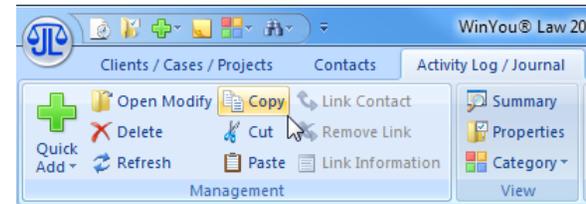
- Entries can be inserted into the same WinYou Law Project (entry will be duplicated)
- Entries can be copied into another project
- Document Entries can be copied to an outlook email as an attachment. Here, the document name is automatically renamed: Title + unique document number.

Select the Document Entry in activity log / Journal

1. Click on the button «Copy»
 2. Create a new EMail in Outlook
 3. Within the text in email right click to get the context menu and select "Insert"
- You can also copy Document entries to the Windows desktop or in Windows Explorer (we supports Windows standards).

TIP: You can also do this directly with drag & drop!

Date	Type	Info	Ow...	Text
1/27/2010	Task		JC	Tel Mr Brown
1/24/2010	Document	L0000274.doc	JL	Contract
1/24/2010	Document	X0000246.msg	JL	EEmail

**Cut**

Cut selected entry in activity log / journal to the windows clipboard.

In this case the entry is moved.

TIP: You can also do this directly with drag & drop!
(keep "SHIFT" on the keyboard pressed)

Paste

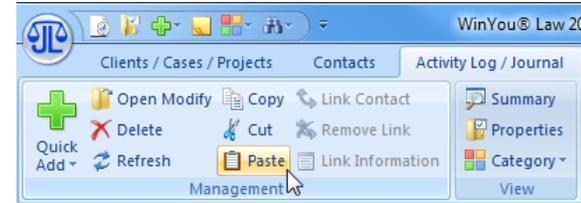
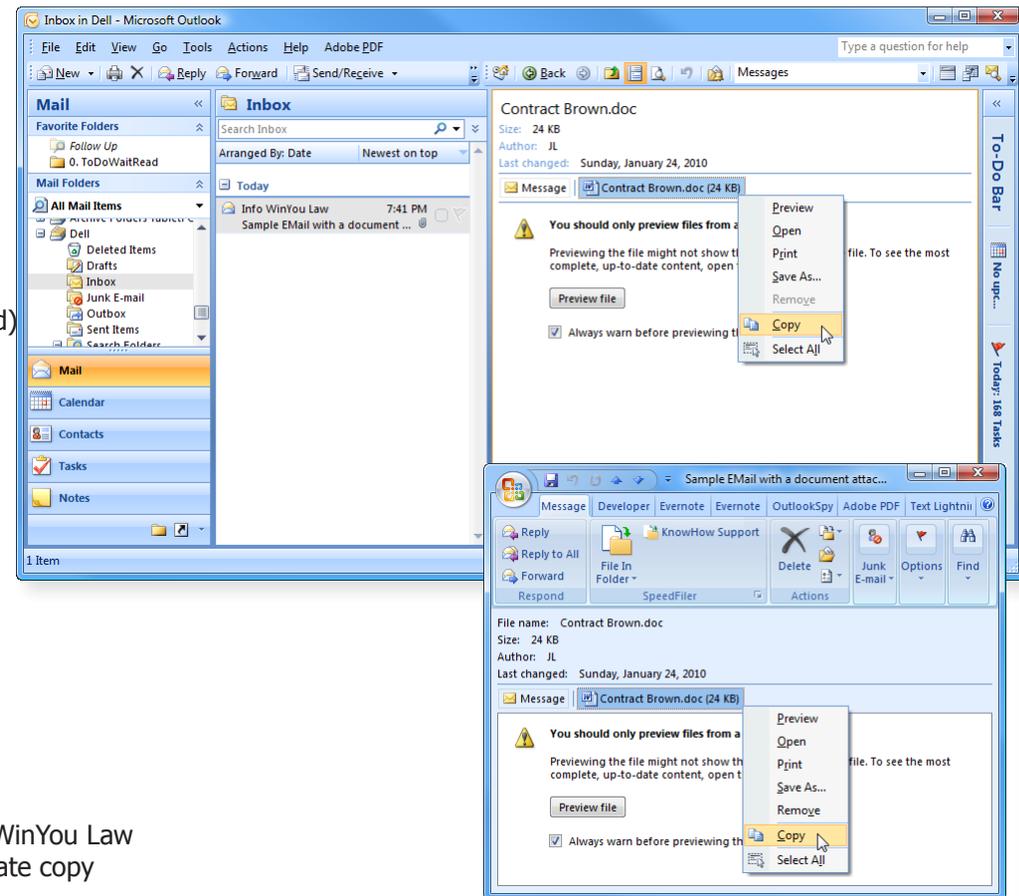


Paste from the windows clipboard to WinYou Law activity Log / Journal. Possibilities:

- WinYou Law entires
- **Documents** in Windows Explorer
- Documents from Windows Desktop
- An **EMail** from Outlook:
 1. Use the Outlook Menu "Edit / Copy"
(Context menu doesn't contain any copy command)
 2. In WinYou Law use the button "Paste". The entry is inserted in the activity log / journal as a document entry
- An **Attachment** from an Outlook EMail:
 1. Right-click on the attachment in Outlook to get the context menu
(Either in Outlook Explorer preview / reading pane or in an open email)
 2. In context menu select "Copy"
 3. In WinYou Law use the button "Paste". The entry is inserted in the activity log / journal as a document entry

The EMail are stored as separate documents (msg) in the WinYou Law Documents Folder (AutoDoc). This means you have a separate copy of these emails in the WinYou Law activity log / Journal!

TIP: You can also do this directly with drag & drop!

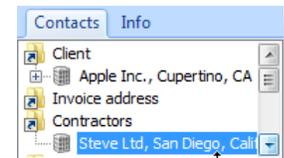
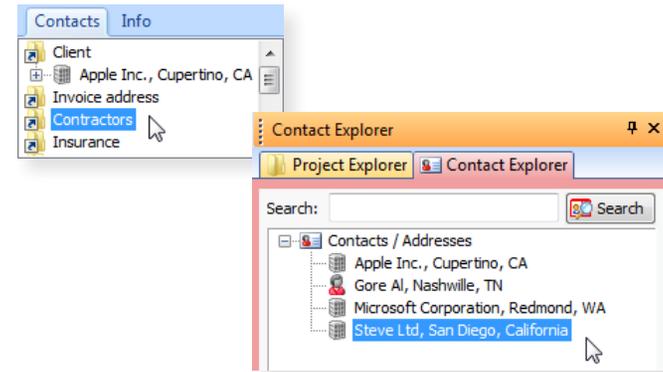


!	Date	Type	Info	Ow...	Text
	1/27/2010	Task		JC	Tel Mr Brown
	1/24/2010	Document	X0000283.doc	JL	Contract Brown
	1/24/2010	Document	L0000274.doc	JL	Contract

Link Contact

1. Select the link type in the contacts window.
The button "Link Contact" is now activated.
2. Select the desired Contact / Address in the Contact Explorer
3. Click on the button "Link Contact"

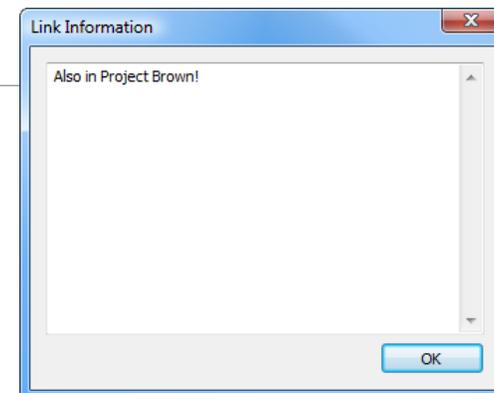
The desired contact / address is now linked with the current project. This link is also visible in the Document Control Center - see also "Link Contact" on Page 81

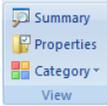
**Remove Link**

1. Select the desired contact / address in the Contacts window
 2. Click on the button "Remove Link"
- The contact / address is no longer associated (linked) with the current project.

Link Information

Here are link information which are visible only in this link combination.





View



Summary

An overview over Hours, Fees, Work in Progress etc.



Type	Amount
Hours	3.40
Fees	680.00
Expenses w/o Flat Exp.	267.00
Sales Tax	0.00
Total Work in Progress	947.00
- Payments on Account	0.00
- Write Off	0.00
Work in Progress net	947.00
Invoiced	3,525.00
- Payments received	0.00
** WIP + A/R	4,472.00
Client's Account	0.00

Properties

Properties of the selected activity log / journal entry.



Log		Security	
Company:	1	Lognumber:	246
Project no.	3	Date:	1/24/2010
Owner:	John Lance	Debit:	<input type="checkbox"/> No accounting
Status:	Ok	Credit:	
Invoice:	0	VAT:	
Apply			

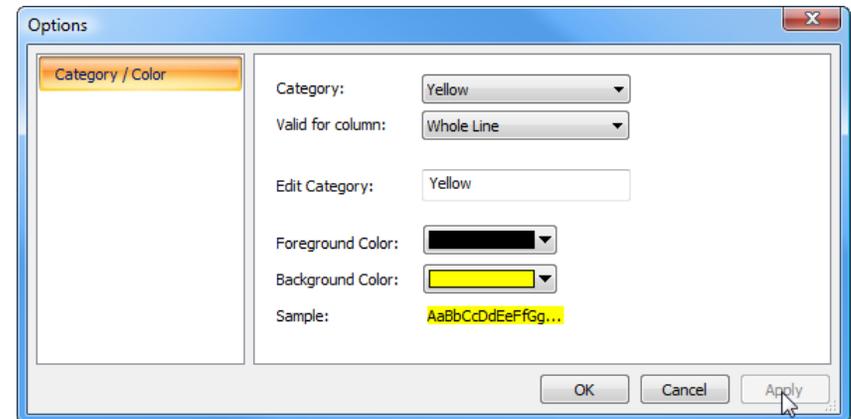
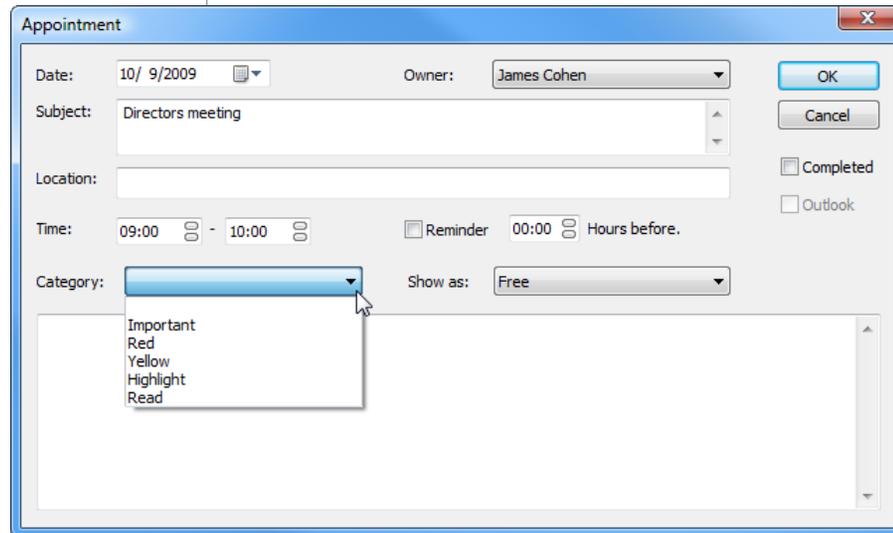
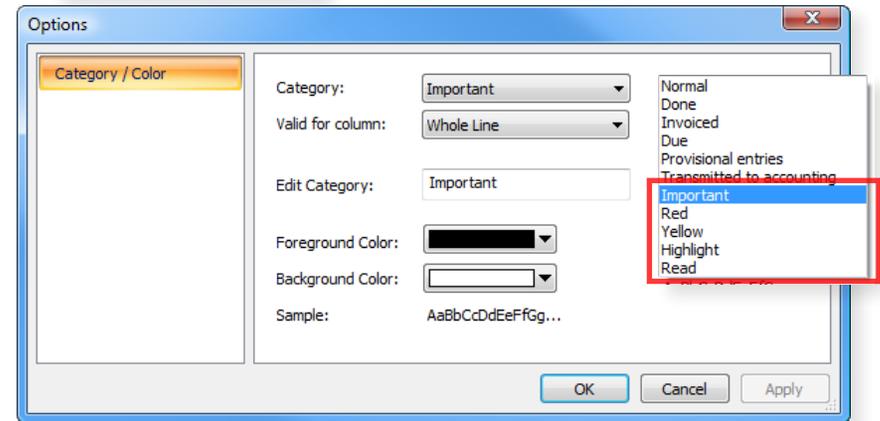
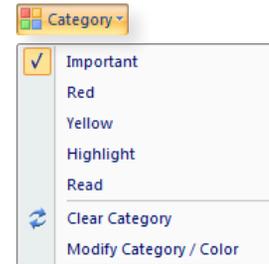
Category



To assign a category to an entry in the journal / log, click on the button "Category". In the Sub Menu, select your category.

Choose "Modify Category / Color" to change your own categories.

In the dialog "Categories / Color» select the appropriate category. You can not change the category name in certain categories (first 6 are fix), but the last 5 are available.





Tools



Export to Excel

Click on the button "Export to Excel" to export the current view in the journal / log to Excel.

Existing filter / search text in activity log / journal are active.

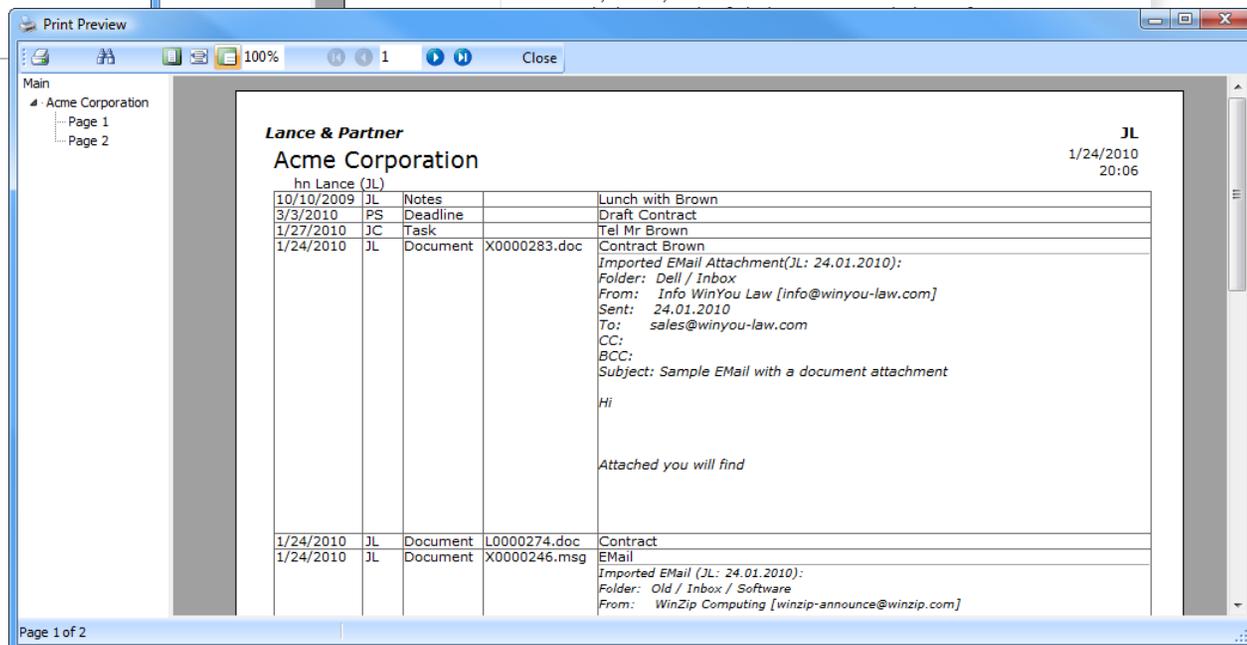
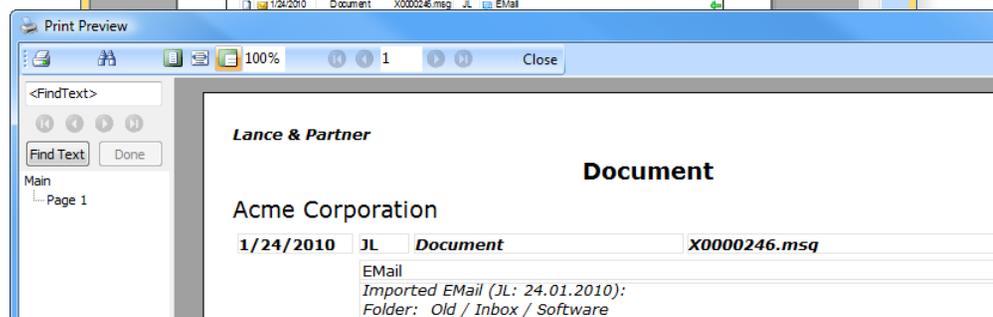
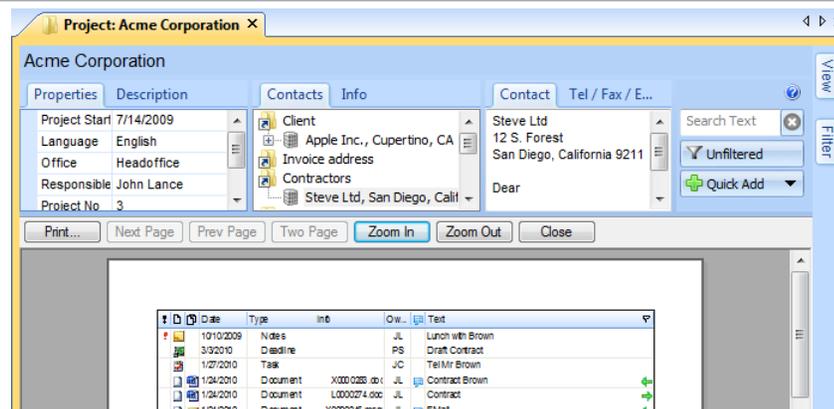
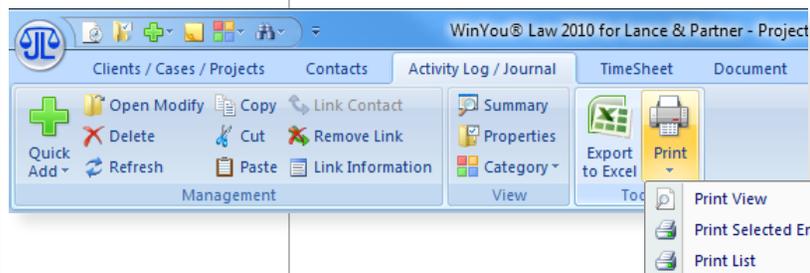


	A	B	C	D	E	F	G	H	I	J
1	Acme Corporation									Lance & Partner - JL - 1/24/2010
2										
3	Date	Ownr	Type	Info	Text	Hours	Fee	Expense	Bill	Payment
4	10/10/2009	JL	Notes		Lunch with Brown	-	-	-	-	-
5	3/3/2010	PS	Deadline		Draft Contract	-	-	-	-	-
6	1/27/2010	JC	Task		Tel Mr Brown	-	-	-	-	-
7	1/24/2010	JL	Document	X0000283.doc	Contract Brown	-	-	-	-	-
8	1/24/2010	JL	Document	L0000274.doc	Contract	-	-	-	-	-
9	1/24/2010	JL	Document	X0000246.msg	Email	-	-	-	-	-
10	1/19/2010	JL	DocVersions	Ver. 2 L0000144.d	Contract	-	-	-	-	-
11	1/19/2010	JL	Document	X0000141.pdf		1/14/2010	-	-	-	-
12	10/10/2009	JC	Fee	3.40 hrs 748.00	Contract	3.40	748.00	-	-	-
13	10/9/2009	JC	Appointment	09:00	Directors meeting	-	-	-	-	-
14	10/5/2009	JL	Expenses	Travel expenses	Contract	-	-	200.00	-	-
15	10/5/2009	JC	Expenses	Phone calls	Contract	-	-	67.00	-	-
16	10/3/2009	JL	Task		Draft letter of intent	-	-	-	-	-
17	9/17/2009	JL	Email	X0000140.msg	Outlook Sent: Draft Contract (Email drag	-	-	-	-	-

Print



You have three different possibilities to print from the activity log / journal:



TimeSheet

Introduction

In the TimeSheet you enter your work and expenses as continuous text, just as if you would write it down on paper. You can work with your usual abbreviations (AutoCorrect for Text or Shortcuts for Fees and Expenses) WinYou Law completes the text immediately and integrates it in the selected project. With individual shortcuts, that register several entries in one step, you can win precious time. Of course the classical way of entering Fees and Expenses is also available.

You have different ways of entering your entries. You can enter minutes (e.g. 45m), decimal hours (e.g. 0.5h) or amounts directly (e.g. Total Fee: tf250.00). In the TimeSheet you can enter time periods "from - to" or stop/start your working time. Expenses are entered in amounts, e.g. (5.50co for 5.50 copies).

Day	Week	Month	Working hours / Holidays		Hrs	Amount	Expenses	Text
Project	Type	From	To					
Acme Corporation / Wi...	Fee	00:00	00:00		5.00	1,750.00		Study of files
Acme Corporation	Fee	00:00	00:00		1.00	350.00		Contract
McKinsey	Fee	00:00	00:00		0.50	175.00		Tel

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Overview

Currently selected (highlighted) project in the Project Explorer

TIP: You can toggle (switch) between the Project Explorer (select another project) and the Timesheet with the "Tab key"

Data input (different possibilities):

Normal text (full text)

Autotext / Shortcuts

Enter defined Autotext e.g. "sof". This is converted into "study of files."

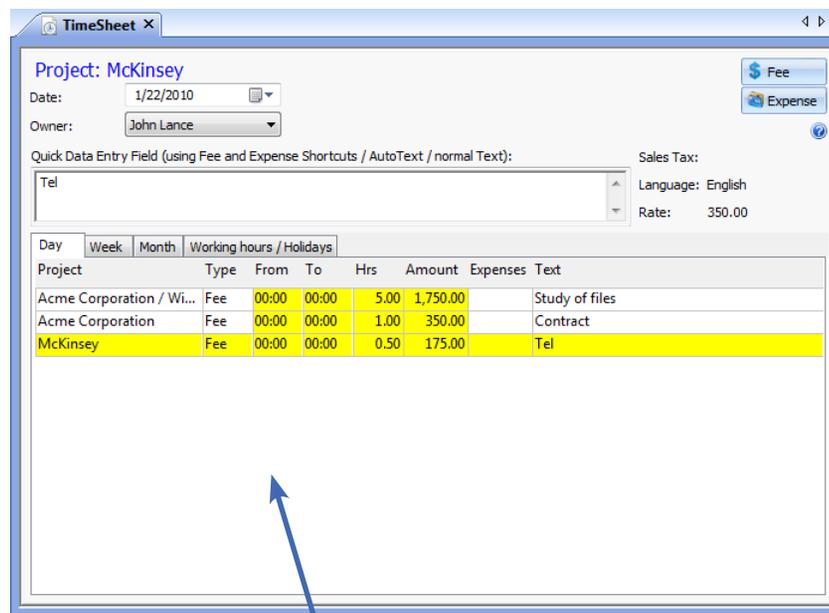
TimeSheet Shortcuts

Specialized shortcuts for entering fees (hours, minutes, From - To, etc.) or costs (see following page)

You can combine these 3 different input types

Example:

- "Meeting with Mr Brown 3h"
Timesheet generates a fee entry 3.0 Hours with the text "Meeting with Mr Brown"
- "sof Contract 25m"
Timesheet generates a fee entry 25 minutes with the text "Study of files" ("sof" is a autotext for "Study of files")



Enter Fees and Expenses with the traditional dialog

Properties for actual Project

The project **language** is displayed in the Timesheet. When an Autotext is detected, this will be replaced automatically in the project language.

The **Sales Tax / VAT** of the project is displayed in the Timesheet. The rate will automatically be taken in account for fees and expenses.

The **fee rate** is also displayed. If a special fee was defined in a project, this will be displayed.

All entries are shown for selected

- «Date»
- «Owner»



Introduction to TimeSheet Shortcuts

If WinYou Law TimeSheet recognizes a Text Shortcut, it will automatically insert the corresponding text. You can combine these text Shortcuts with normal text and / or with TimeSheet Shortcuts.

Fee Shortcuts

- m** Minutes (**45m** = 45 Minutes)
- h** Decimal Hours (**1.5h** = 1:30 hours)
- int** Internal Hours without fee and rate (**.5int** = 0:30 hours)
- fr** Override the automatic Fee Rate (**90fr** = temporarily Fee Rate of \$90)
- tf** Enter Total Fee directly without Hours (**tf400** = Total Fee of \$400)

Timer Shortcuts

- sta** Starts the Timer (**sta** = Actual system Time will be entered in the From field) You can continue with text or just save with the ENTER key.
Enter the Start Time (**sta09.20** = 09:20 will be entered in the From field). We are using the military 24 Hrs clock i.e. 01:30pm = 13:30
- ss** Stops and Starts the Timer: Stops the Timer in the previous Project, starts a new Timer in selected Project. Select a project (A), type sta and press enter in TimeSheet Data Entry (check the From field, of course you can also enter text or text shortcuts) After finishing working with project A you want to work with project B: Select Project B, type ss and press enter (of course you can also enter text or text shortcuts). In project A the timer is stopped, hours are calculated, and the fee entry is updated. In project B a new timer is started (use TimeSheet Shortcut sto to stop the last Timer)
- sto** Stops the Timer (**sto** = Actual system Time will be entered in the To field) You can continue with text or just save with the ENTER key. Enter the Stop Time (**sto11.45** = 11:45 will be entered in the To field, Fee will be calculated) We are using the military 24 Hrs clock i.e. 01:30pm = 13:30

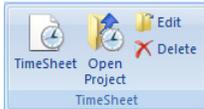


The WinYou Law Shortcuts are shown in the Legend

TimeSheet	
Hours	6.50
Fees	2,275.00
Expenses	0.00
*fr	Fee rate
sta*	Fee time from
sto*	Fee time until
*h	Hours of fee
*int	Intern
*m	Minutes of fee
ss*	Start/Stop
tf*	Total fee
*ca	Carriage
*co	Copies
*f	Fax
*mis	Miscellaneous
*re	Reimbursement
*t	Telephone
*tr	Travel expenses

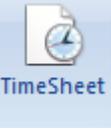
Expenses Shortcuts

- ca** Carriage (**13ca** = \$13 Carriage)
- co** Copies (**13co** = \$13 Copies)
- f** Fax (**13f** = \$13 Fax)
- mis** Misc. (**13mis** = \$13 Miscellaneous Expenses)
- re** Reimb. (**13re** = \$13 Reimbursement)
- t** Tel. (**13t** = \$13 Telephone)
- tr** Travel (**13tr** = \$13 Travel Expenses)



TimeSheet



<p>TimeSheet</p> 	Show TimeSheet
<p>Open Project</p> 	Selected Project in the TimeSheet list will be opened.
<p>Edit</p> 	The selected entry from the Timesheet list is read into the data entry window again, and can be modified.
<p>Delete</p> 	The selected entry from the Timesheet list will be deleted.



Add

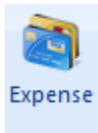
**Fee****The traditional fee dialog is used:**

Fee

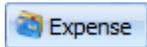


Fee

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- From:** You can enter a time period from
- To:** You can enter a time period to, or minutes
- Hours:** Here you can enter the time in decimal hours (0.5 = 30 minutes)
- Type:** If there are various types of fees you can select the desired type here.
- Rate:** Can be modified for an entry. Standard display is the hourly rate of the current User or Project.
- Total:** Is calculated automatically according to the time period and the rate. Can be overwritten. You can also enter a flat fee without hours or a time period.
- Sales Tax:** Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.
- Text:** The corresponding text. You can use text shortcuts.
- Internal use:** Internal text, will not be shown on the bill

Expense**The traditional expense dialog is used:**

Expense



Expense

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Expense:** Select the type of expense you want to enter.
- Miles:** If you have selected travel expenses, type here the number of miles. The expenses total is automatically entered in the field Total.
- Number:** If you have selected Total Copies, you enter the number of copies. The expense total is automatically entered in the field Amount.
- Amount:** Type here the total amount of the selected expense.
- Sales Tax:** Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.
- Text:** The corresponding text. You can use text shortcuts.

Daily View Show Hours Refresh
 Weekly View Show Amounts Save View
 Monthly View Billed Entries Restore
[View](#)

View



Day

Daily View

Tab «Day» is shown:

Day	Week	Month	Working hours / Holidays						
Project	Type	From	To	Hrs	Amount	Expenses	Text		
Acme Corporation / Wi...	Fee	00:00	00:00	5.00	1,750.00		Study of files		
Acme Corporation	Fee	00:00	00:00	1.00	350.00		Contract		
McKinsey	Fee	00:00	00:00	0.50	175.00		Tel		

Week

Weekly View

Tab «Week» is shown:

Day	Week	Month	Working hours / Holidays					
Project 18.01.2010 - 24.0...	Mon	Tue	Wed	Thu	Fri	Sat/Sun	** Total	
Acme Corporation		0.00	0.00	0.00	0.00	1.00	0.00	1.00
Acme Corporation / Wi...		0.00	0.00	0.00	0.00	5.00	0.00	5.00
McKinsey		0.00	0.00	0.00	0.00	0.50	0.00	0.50
Total Hours		0.00	0.00	0.00	0.00	6.50	0.00	6.50

Month

Monthly View

Tab «Month» is shown:

Day	Week	Month	Working hours / Holidays				
Project 01.01.2010 - 31.0...	Hrs.	Fee	Flat Fee	No...	** Hrs.	** Am.	
External:							
Acme Corporation		1.00	350.00	0.00	0.00	1.00	350.00
Acme Corporation / Wi...		5.00	1,750.00	0.00	0.00	5.00	1,750.00
McKinsey		0.50	175.00	0.00	0.00	0.50	175.00
** Total external		6.50	2,275.00	0.00	0.00	6.50	2,275.00
*** Total		6.50	2,275.00	0.00	0.00	6.50	2,275.00

Hours

Show Hours

Shows Hours in the Weekly list

Amounts

Show Amounts

Shows Amounts in the Weekly list

Billed

Billed Entries

Shows billed entries in the daily list.

Refresh

Refresh

Refresh the TimeSheet List (reread from database)

Save View

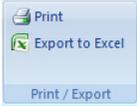
Save View

Save actual view.

Restore

Restore

Restore default View of TimeSheet list

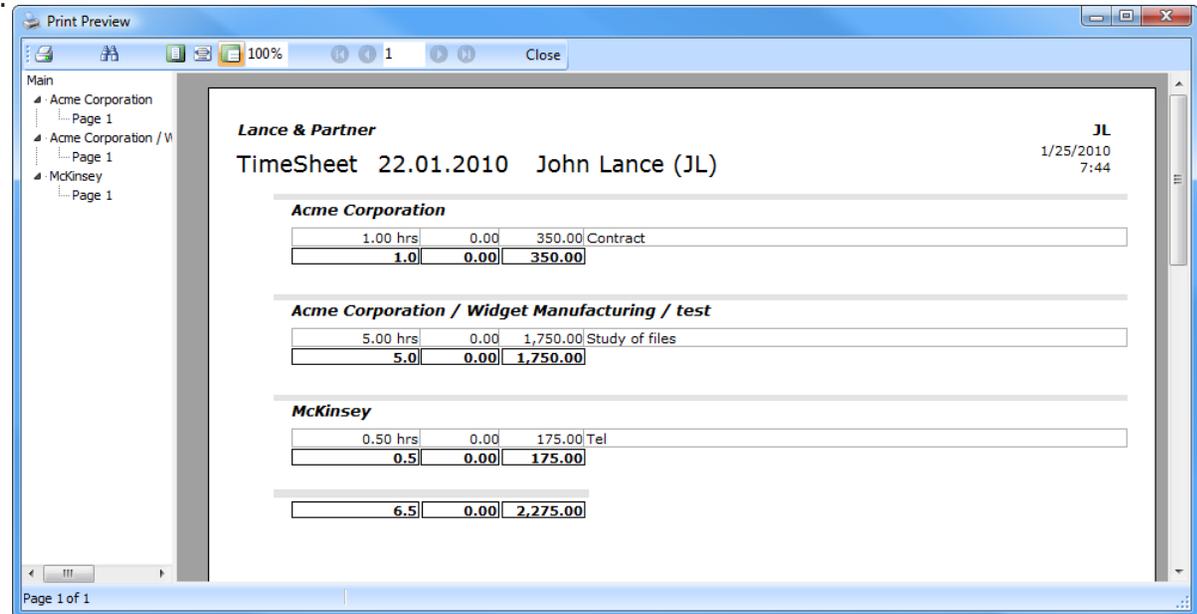


Print / Export



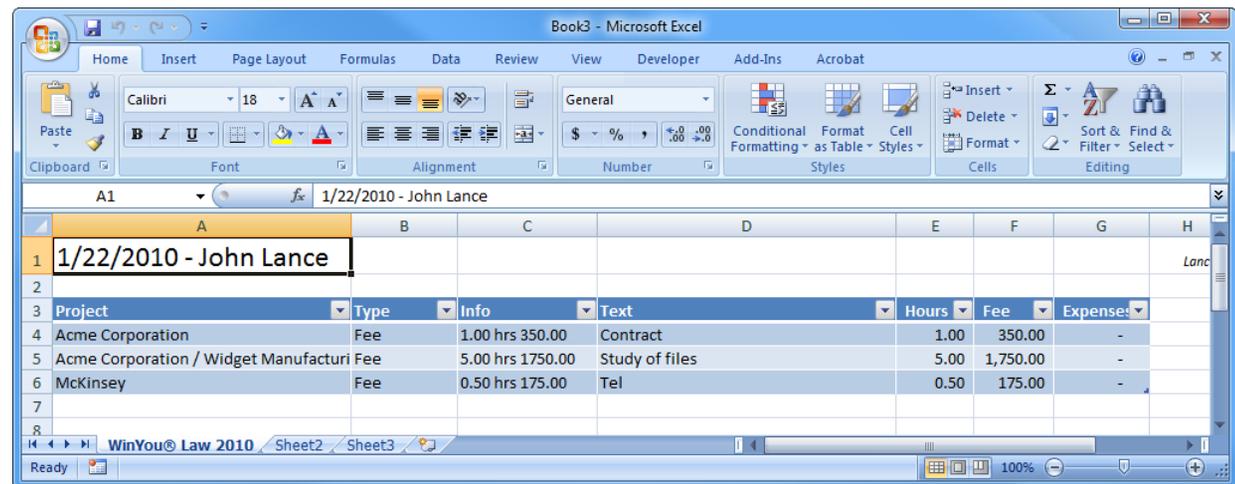
Print

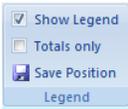
Displayed List in TimeSheet will be printed.



Export to Excel

Displayed List in TimeSheet will be exported to Excel.





Legend



Show Legend

TimeSheet Legend window will be shown.



TimeSheet	
Hours	6.50
Fees	2,275.00
Expenses	0.00
*fr	Fee rate
sta*	Fee time from
sto*	Fee time until
*h	Hours of fee
*int	Intern
*m	Minutes of fee
ss*	Start/Stop
tf*	Total fee
*ca	Carriage
*co	Copies
*f	Fax
*mis	Miscellaneous
*re	Reimbursement
*t	Telephone
*tr	Travel expenses

Totals only

Only the total amounts will be shown in the Legend.



TimeSheet	
Hours	6.50
Fees	2,275.00
Expenses	0.00

Save Position

The position of Legend Window will be saved.



Document

Introduction

The tab «Document» contains all the processing possibilities for documents

The screenshot displays the WinYou Law 2010 software interface. The main window is titled "Project: Acme Corporation" and has the "Document" tab selected in the menu bar. The toolbar contains various actions for document management, such as "Create Document", "Open Document", "Search Documents", "Change Title", "Import Document", "Show Documents", "Explore Folder", "Security", "Management", "Show DocCenter", "View Contact", "Link Contact", "Remove Link", "Link Information", "Document Control Center", "Comment", "Revert", "Delete", and "Version Management".

The Project Explorer on the left shows a tree view of the project structure, with "Acme Corporation" selected. The main workspace displays a list of project activities and a detailed view of a selected document.

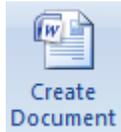
!	Date	Type	Info	Ow...	Text
!	10/10/2009	Notes		JL	Lunch with Brown
	3/3/2010	Deadline		PS	Draft Contract
	1/27/2010	Task		JC	Tel Mr Brown
	1/24/2010	Document	X0000283.doc	JL	Contract Brown
	1/24/2010	Document	L0000274.doc	JL	Contract
	1/24/2010	Document	X0000246.msg	JL	EMail
\$	1/22/2010	1.00 hrs	350.00	JL	Contract
	1/19/2010	DocVersions	Ver. 2 L000014...	JL	Contract
	1/19/2010	Document	X0000141.pdf	JL	2010-01-14
\$	10/10/2009	3.40 hrs	748.00	JC	Contract
!	10/9/2009	Appointm...	09:00	JC	Directors meeting
	10/5/2009	Travel exp...	200.00	JL	Contract
	10/5/2009	Phone calls	67.00	JC	Contract
	10/3/2009	Task		JL	Draft letter of intent
	9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged fro...

The bottom status bar shows: Copyright ©2010 JL Inc. All rights reserved. www.winyou-law.com Registered for 5 User(s) Workgroup Monday, January 25, 2010



Create

Create Document



Create EMail



WinYou Law opens the Document Control Center:

1. Select a document Template

2. Select a Contact / Address

Select the Project Related Address (or as shown, directly the Contact Person). In the Address window you will see how the Address will exactly be shown in the document. You can also drag a contact from the Contact Explorer directly in the address window **A** (Drag & Drop)

3. Title / Subject

The Title will be shown in the Activity Log Document Entry for the project. The Subject will be shown in the document

4. Click on the button "Create" to create the document

- Word opens with the corresponding template as a new document
- All bookmarks in the template are filled in (address, subject etc.)
- The document is saved automatically
- It adds a corresponding entry in the activity log / journal
- If «Automatic Fee» is enabled, a fee will automatically be generated

Send Documents



1. Select one or more Documents in the Activity log / journal that you want to send with Email

!	Date	Type	Info	O...	Text
	1/24/2010	Document	X0000283.doc	JL	Contract Brown
	1/24/2010	Document	L0000274.doc	JL	Contract
	1/24/2010	Document	X0000246.msg	JL	E-Mail
\$	1/22/2010	1.00 hrs	350.00	JL	Contract
	1/19/2010	DocVersions Ver. 2	L0000144.d...	JL	Contract
	1/19/2010	Document	X0000141.pdf	JL	2010-01-14
\$	10/10/2009	3.40 hrs	748.00	JC	Contract

2. Click on "Send Documents"
The dialog «Create EMail» opens

Create EMail

Linked Contacts with Acme Corporation

- Client
 - Apple Inc., Cupertino, CA
 - Invoice address
 - Contractors
 - Steve Ltd, San Diego, California
 - Insurance
 - Bank
 - Microsoft Corporation, Redmond, WA
 - Counterparty
 - Lawyer of counterparty
 - Other

Email Addresses for selected Contact:

E-Mail
Business info@microsoft.com

Select an email address and click on To -> or Cc -> to add

To -> info@apple.com

Cc -> info@microsoft.com

Bcc ->

Documents:

Original	Document Name (modify directly here)	Ext.
X0000283.doc	Contract Brown Original	.pdf
Ver. 2 L0000144.doc	Contract Latest Version	.pdf

Send Word Documents as PDF

Create EMail Cancel

3. Select Contact / Address

1. Select the EMail Address
2. Click on Button «To ->» or «Cc ->» or «Bcc ->» to assign the EMail Address to the respective fields

Repeat this for more email addresses.

- You can change the document name
- Send word documents as PDF:
If your version of Word supports "save as PDF", you can convert the documents automatically to PDF.

4. Click on the button «Create EMail»
The Outlook email dialog opens, email addresses, subject, title, and all attachments are automatically inserted.
Here you can assign more email addresses from your Outlook address book.

Acme Corporation - Message (HTML)

Message Insert Options Format Text

Times New Rom 12

File In: Microsoft

File Original Message Too

Names

SpeedFiler

Include Options Proofing

To... info@apple.com

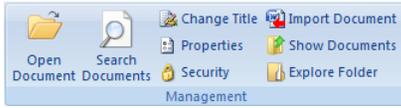
Cc... info@microsoft.com

Bcc...

Subject: Acme Corporation

Attached: Contract Brown Original.pdf (4 KB); Contract Latest Version.pdf (4 KB)

Dear Sir/Madam |

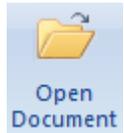


Management



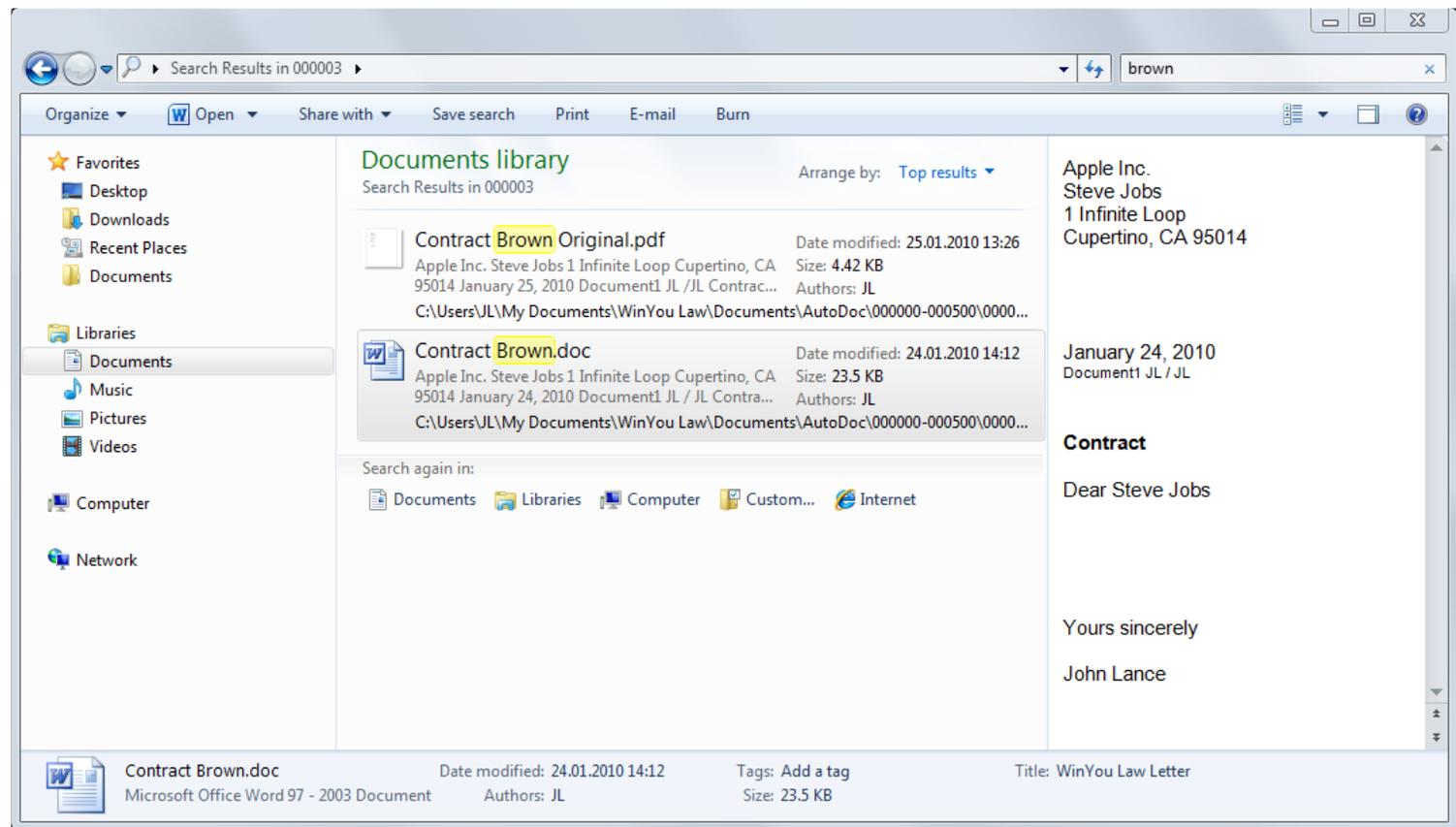
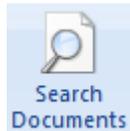
Open Document

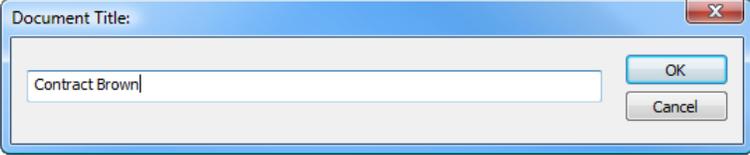
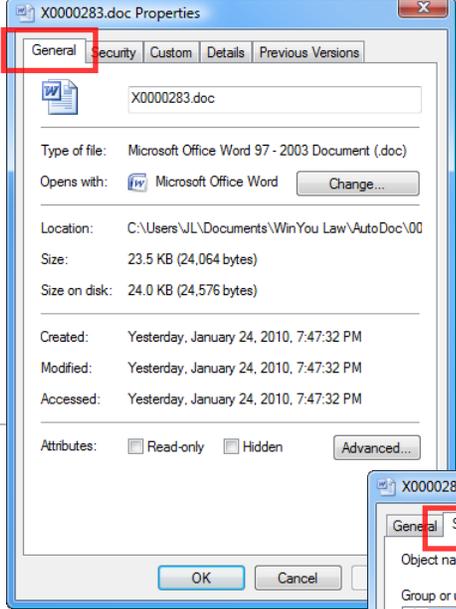
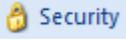
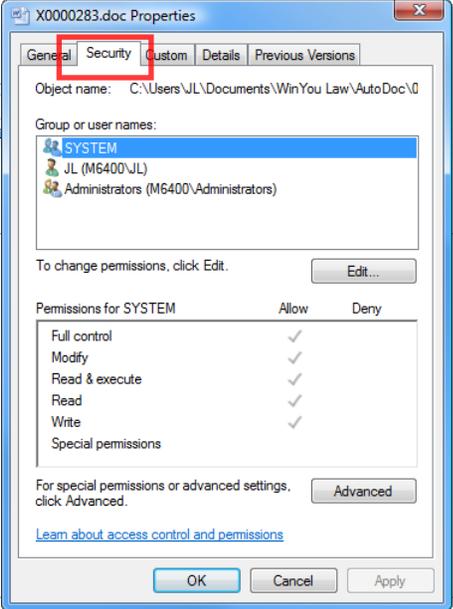
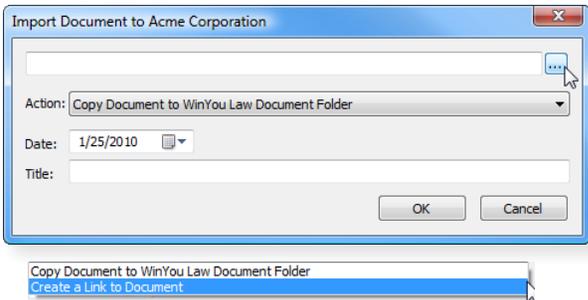
The selected document is opened in the activity log / journal with the appropriate program.



Search Documents

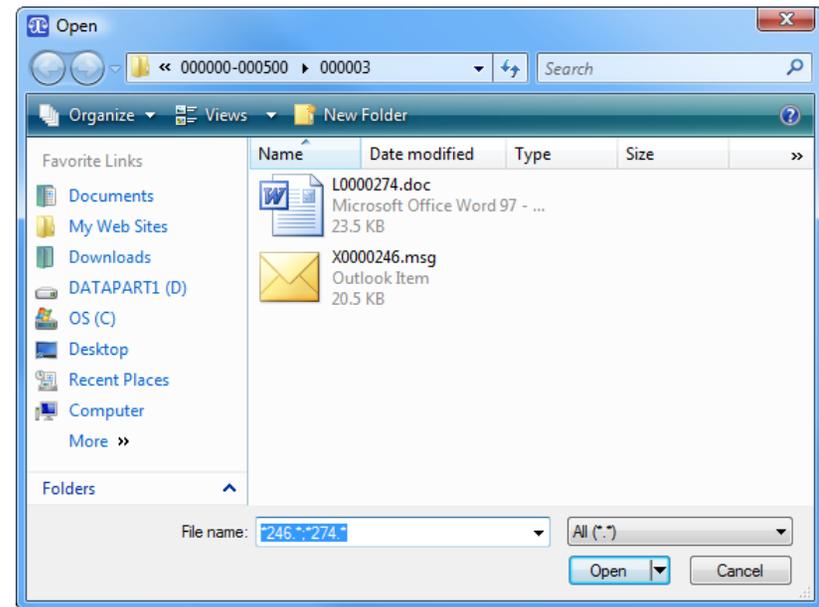
Here you can search all the documents in the current project with full text search



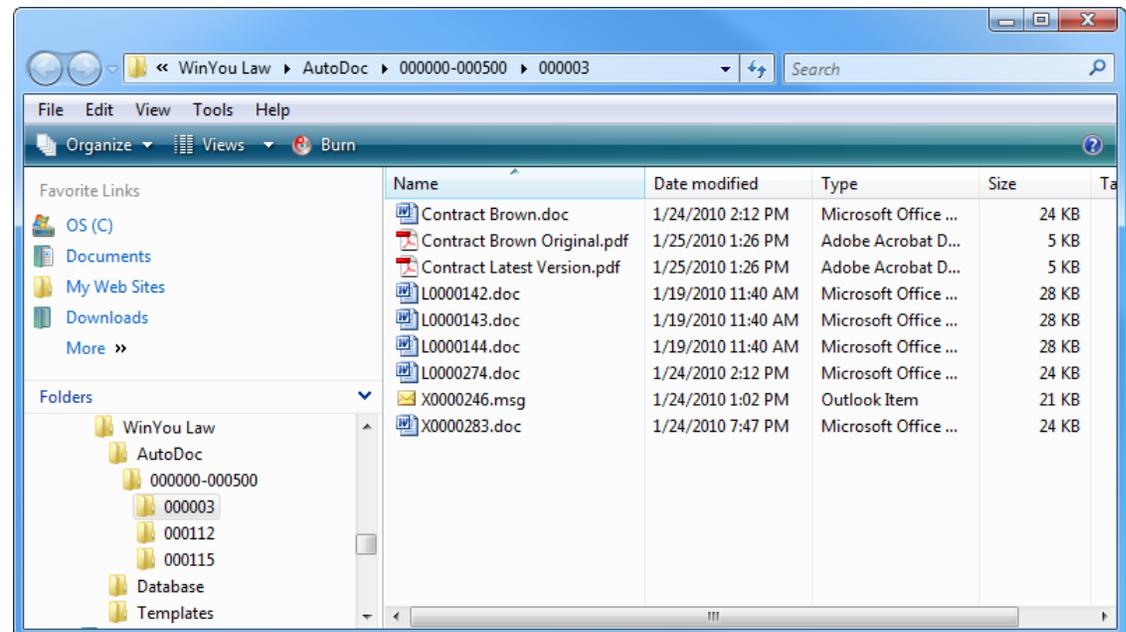
<p>Change Title</p> 	<p>Modify the document title of the selected document</p>	
<p>Properties</p> 	<p>Properties of the selected document</p>	
<p>Security</p> 	<p>Tab Security from the properties dialog</p>	
<p>Import Document</p> 	<p>Import or link external documents</p> <p>TIP: You can also do this with drag & drop</p>	

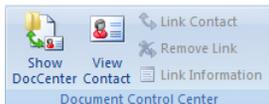
Show Documents

Select one or more documents in the Journal / Activity Log and click on "Show Document". WinYou Law shows the physical documents in an Open dialog of Windows. From here you can copy or move (with drag and drop) to other locations.

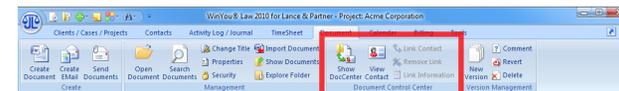
**Explore Folder**

WinYou Law opens the Windows Explorer with the AutoDoc Folder for the selected Project.





Document Control Center



Show DocCenter

With the Document Control Center you can create different documents on the basis of word templates or documents. Any bookmarks will automatically be filled in with text like address, title etc.

Selected project in the Project Explorer

Document Templates

You can customize these templates with Word.

Project - Contact Links:

You can easily create links with drag and drop from the Contact Explorer. These link types are customizable.

Select an Address from the Project - Contact Link List:

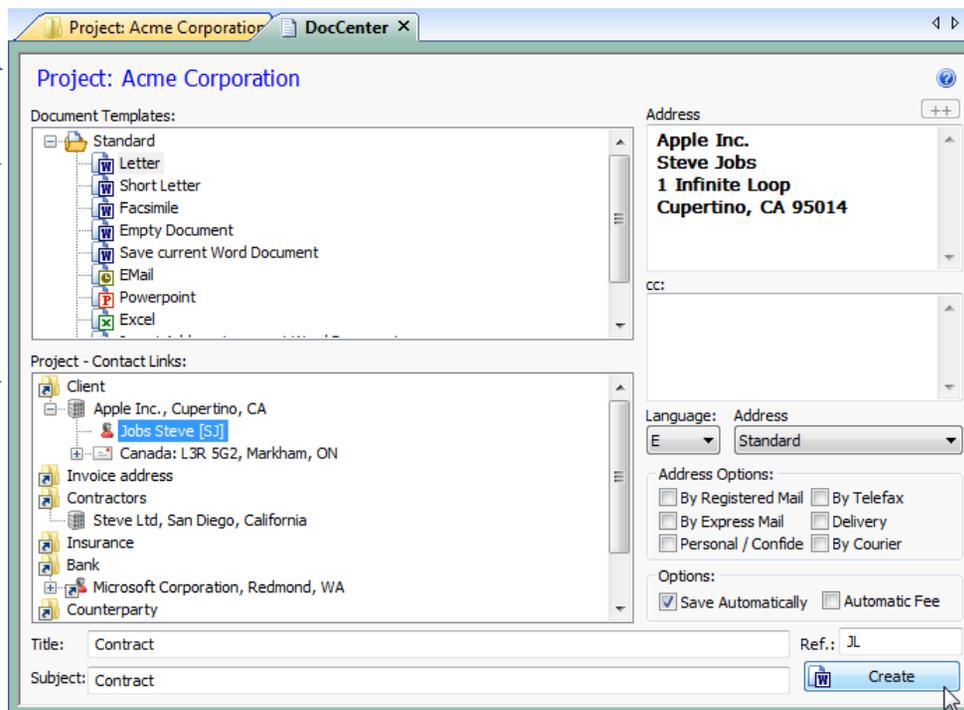
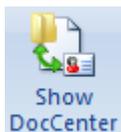
You can select one or more addresses. Hold Button "Ctrl" while clicking on the second and subsequent addresses. You can also use drag and drop. You will see the addresses in the "Address" window immediately.

or Select an Address directly from the Contact Explorer:

You can drag the address directly with drag and drop into the "address" window. You will see the addresses in the "Address" window immediately

Select a CC Address:

You can select one or more addresses. Hold Button "ALT" while clicking on the second and subsequent addresses. You can also use drag and drop. You will see the addresses in the "CC" window immediately.



The **Language** is automatically the same language as the project language. You can change the language for the document here.

Various forms of address can be defined, they are automatically detected from the template.

Address Options

You can combine one or more address Options. These are customizable.

Save Automatic:

Document is saved automatically

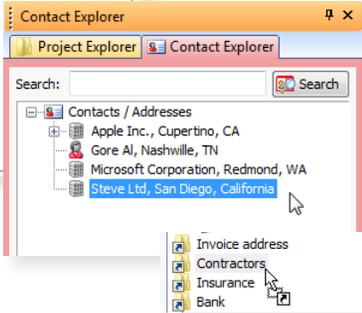
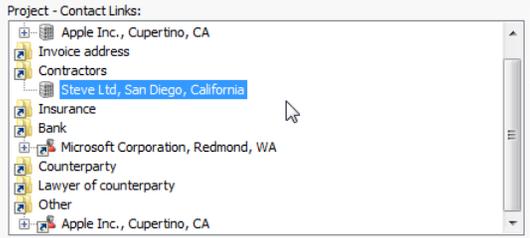
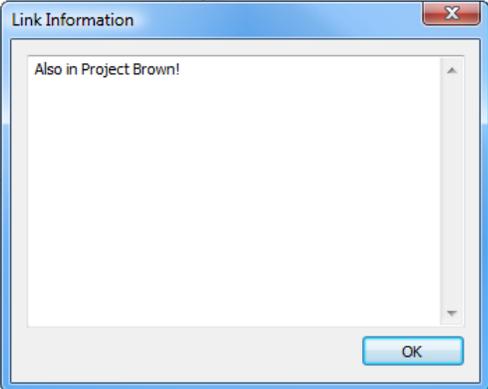
Automatic Fee:

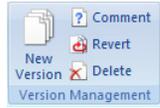
A fee will be automatically saved in the selected project.

Title will be saved in Journal / activity Log

Subject will be inserted into document. Normally same as Title.

Ref. - user initials for the actual logged in user.

<p>View Contact</p>  <p>View Contact</p>	<p>Selected Contact / Address will be opened.</p>
<p>Link Contact</p>  <p>Link Contact</p>	<ol style="list-style-type: none"> 1. Select the link type in the contacts window. The button "Link Contact" is now activated. 2. Select the desired Contact / Address in the Contact Explorer 3. Click on the button "Link Contact" <p>The desired contact / address is now linked with the current project. This link is also visible in the Project - Links - see also</p>   
<p>Remove Link</p>  <p>Remove Link</p>	<ol style="list-style-type: none"> 1. Select the desired contact / address in the Contacts window 2. Click on the button "Remove Link" <p>The contact / address is no longer associated (linked) with the current project.</p>
<p>Link Information</p>  <p>Link Information</p>	<p>Here are link information which are visible only in this combination.</p>  



Version Management



New Version

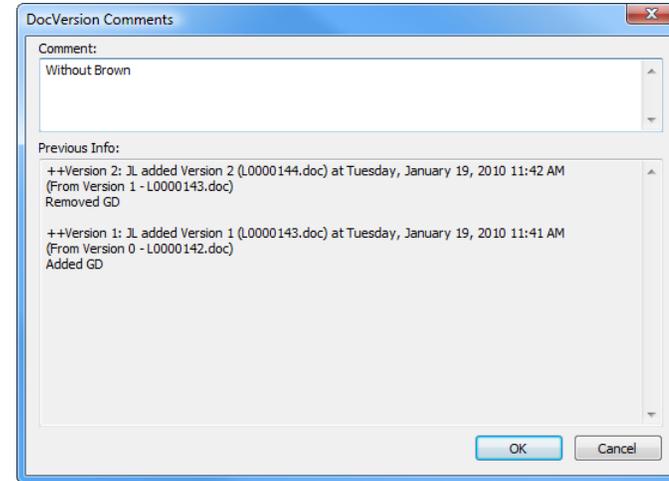


Here you can create new versions of a document.

From the selected Document, a new version will be generated. These are continuously (Ver 2, 3, etc.) renamed, the title remains the same.

In the comment, you can add any text or comments to the new version.

In the activity log / journal, the latest version of a document is displayed, the previous versions are visible when you click the sign [+].



!	Date	Type	Info	O...	Text
	1/25/2010	DocVersions	Ver. 3 L0000286.doc	JL	Contract
	1/19/2010	DocVersions	Ver. 2 L0000144.doc	JL	Contract
	1/19/2010	DocVersions	Ver. 1 L0000143.doc	JL	Contract
	1/19/2010	Document	L0000142.doc	JL	Contract

Comment



Modify any comments for selected version.

Revert



Revert any selected version to the newest version.

Delete

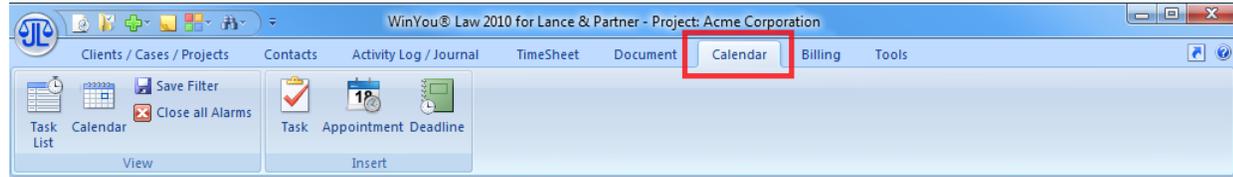


The selected document will be deleted.

Calendar

Introduction

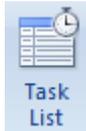
There are two main windows: a calendar view, and a list of tasks, appointments and deadlines.



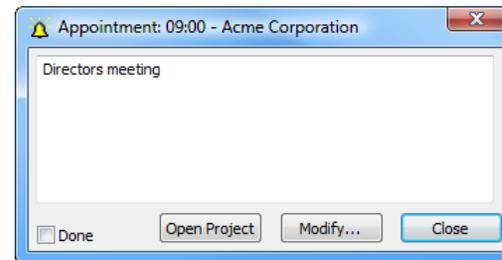
View

Task List

Displays all appointments, tasks and deadlines in chronological order.



Date	Type	Us...	Project Name	Description
1/25/2010 09:00	Appointment	JL	Acme Corporation / Widget M...	Review
1/27/2010 12:00	Appointment	JL	Acme Corporation / Acme Shar...	Meeting with Lang
1/28/2010	Deadline	JL	Acme Corporation / Acme Shar...	Contract (Draft)
1/29/2010 09:00	Appointment	JL	Acme Corporation / Acme Shar...	Meeting Smith



Calendar

Overview Calendar



Insert:
Select the desired time section, select "Insert" and the corresponding date / task / deadline dialog is shown

User / Owner:
You can select one or more users simultaneously and view their entries.

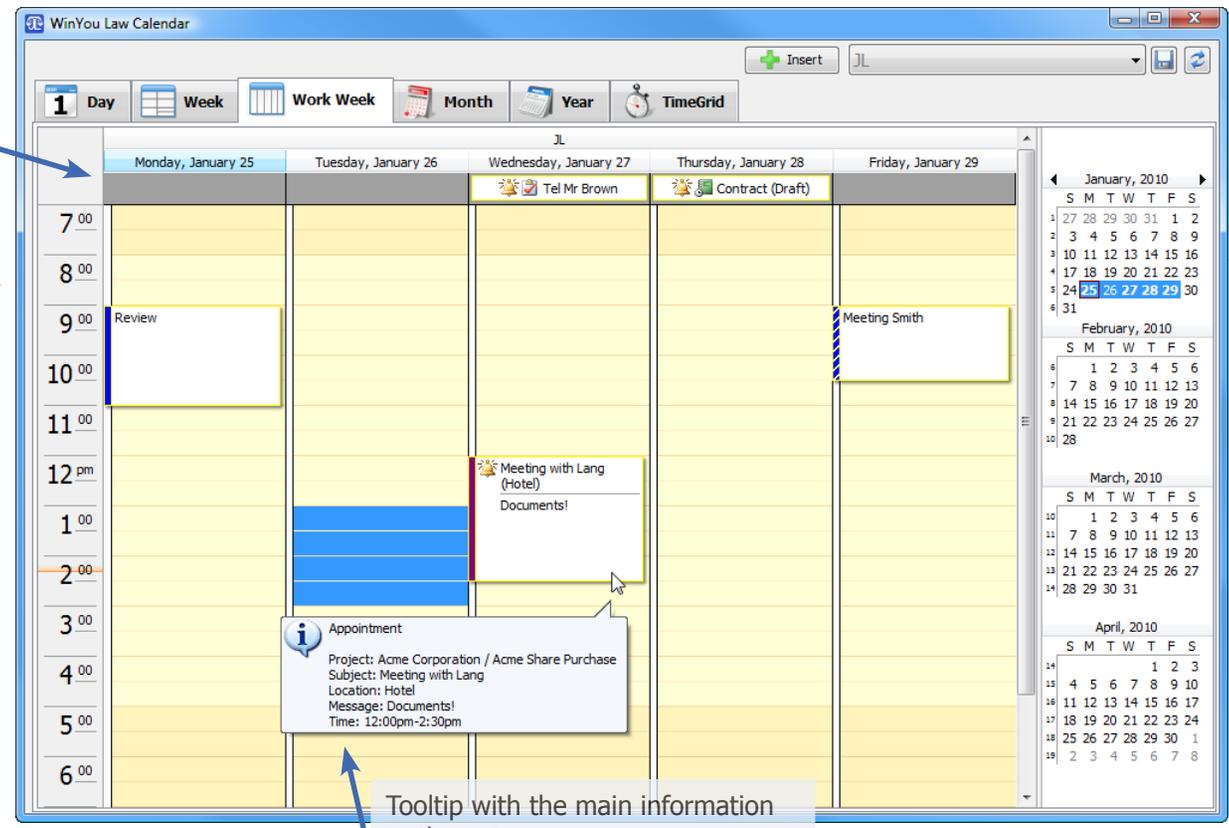
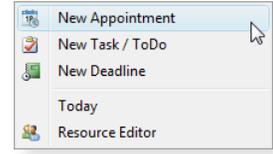
Entries for

- **Tasks / To Do's**
- **Deadlines**

are always shown at the top of the day.

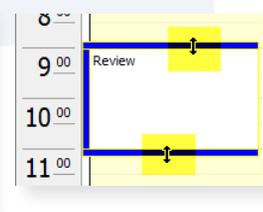
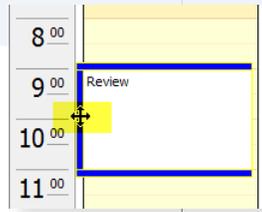
- **Appointments**

TIP: You can move entries with the mouse, change the start time or end time, or move the entry to another user/owner



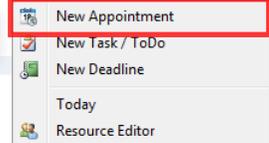
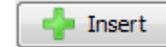
Calendar:
Navigation Pane

Tooltip with the main information to the entry





New Appointment



Search for Client / Case / Project

Appointment

Project:

Date: Owner:

Subject:

Location:

Time: - Reminder: Hours before.

Category: Show as:

Completed Outlook

- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Subject:** Subject
- Location:** Location
- Time:** Time of the appointment.
- Completed:** Activate the check box, when the appointment is done the display color in the Activity Log changes automatically.
- Reminder:** Activate the check box, if you want to be reminded of the appointment.
- Hours** Enter here how long before the appointment you want to (before app.): be reminded.
- Note:** Enter here as much text as you like.
- Category:** Category
- Show as:** Show as in Calendar: (Free, Tentative, Busy, Out of Office)
- Outlook** If checked then appointment is automatically entered in Outlook.

Search for Clients / Cases / Files / Projects

Enter Search Text Dynamic Search

- Favorites
 - Acme Corporation / Widget Manufacturing
- Recent
 - Acme Corporation
 - Acme Corporation / Widget Manufacturing
 - Acme Corporation / Widget Manufacturing / test
 - Acme Corporation / Acme Share Purchase
 - Acme Corporation / Acme Share Purchase / Contracts
- Search Result

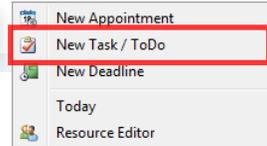
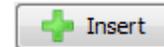
Search for Clients / Cases / Files / Projects

brown Dynamic Search

- Favorites
- Recent
- Search Result
 - McKinsey / Contract / Brown



New Task / ToDo



Search for Client / Case / Project

Task / To Do

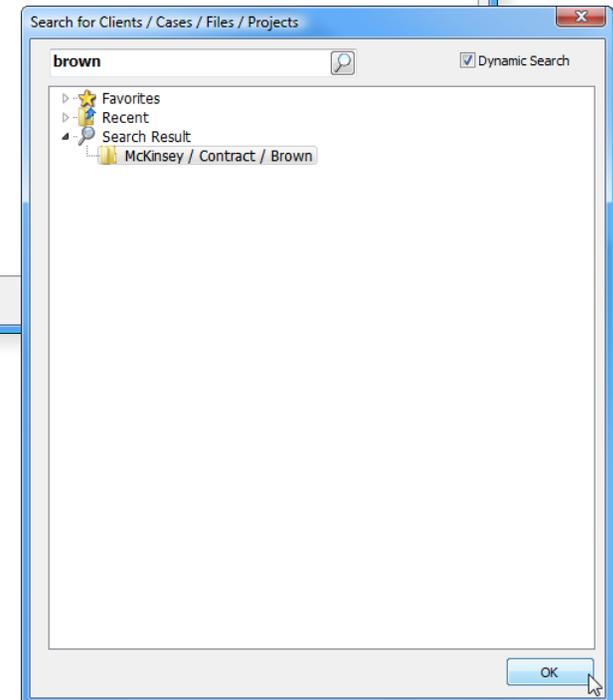
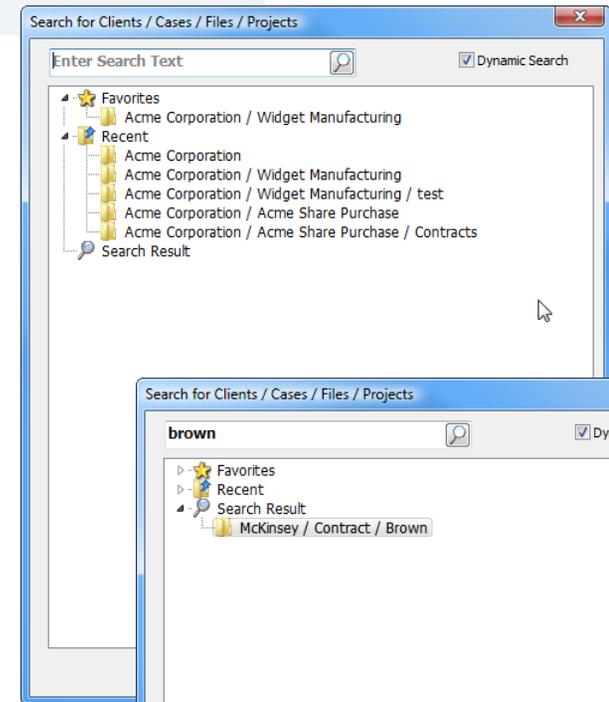
Project: Press any key to search for a project

Date: 1/26/2010 Owner: John Lance

Subject: Completed Outlook

Reminder: 0 Days

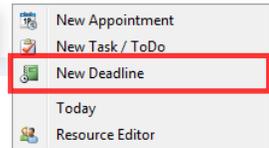
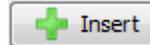
Category:



- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Reminder:** Enter the number of days. During this period the Activity Log entry is displayed in a warning color.
- Done:** Activate check box, when the task is finished – color display in the Activity Log changes automatically.
- Note:** Enter here as much text as you like. This text will be displayed in the Activity Log.
- Outlook** If checked then task is automatically entered in Outlook.



New Deadline



Search for Client / Case / Project

Deadline

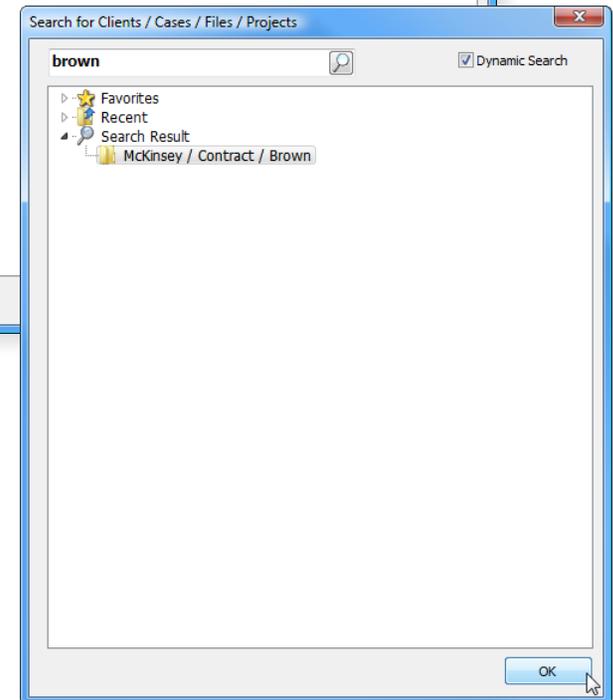
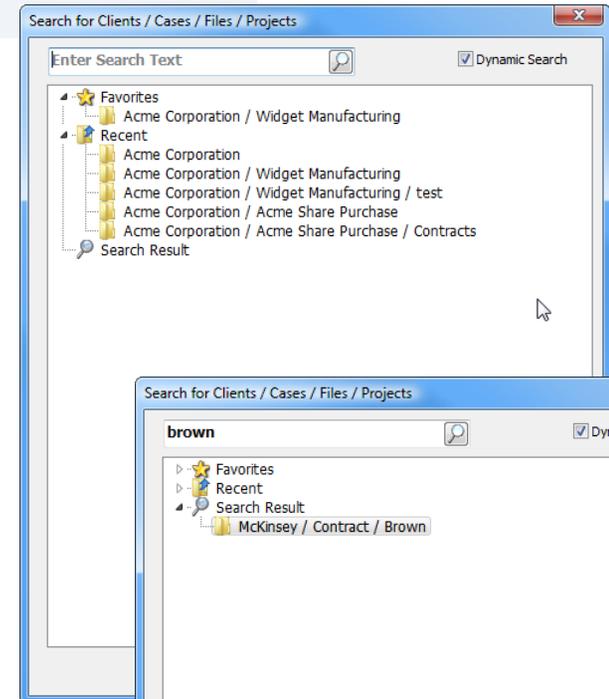
Project:

Date: Owner:

Subject:

Reminder: Days Completed Outlook

Category:



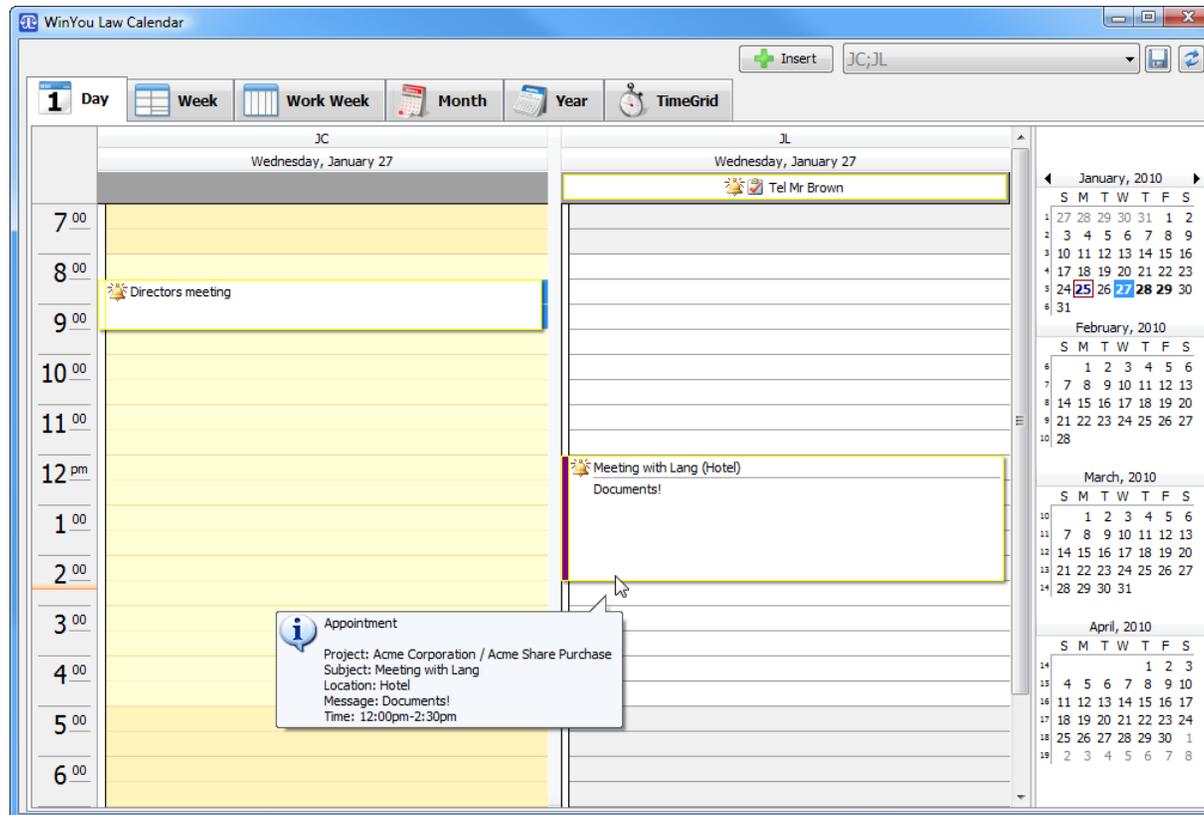
- Date:** Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
- User:** The login user is proposed automatically.
- Reminder:** Enter the number of days. During this period the Activity Log entry is displayed in a warning color.
- Done:** Activate check box, when the deadline is finished – color display in the Activity Log changes automatically.
- Note:** Enter here as much text as you like. This text will be displayed in the Activity Log.
- Outlook** If checked then deadline is automatically entered in Outlook.

Calendar Views



1 Day

The example shows the day-view with two users:



Select the day.

Bold Date means that entries are present.



TIP: You can move entries between users.

Week

1 Day **Week** Work Week Month Year TimeGrid

WinYou Law Calendar

Insert

1 Day **Week** Work Week Month Year TimeGrid

Monday, January 25 Thursday, January 28

9:00am 11:00am Review Contract (Draft)

Tuesday, January 26 Friday, January 29

9:00am 10:30am Meeting Smith

Wednesday, January 27 Saturday, January 30

12:00pm 2:30pm Tel Mr Brown Meeting with Lang (Hotel)

Sunday, January 31

January, 2010

S	M	T	W	T	F	S
1	27	28	29	30	31	1
2	3	4	5	6	7	8
3	10	11	12	13	14	15
4	17	18	19	20	21	22
5	24	25	26	27	28	29
6	31					

February, 2010

S	M	T	W	T	F	S
6	1	2	3	4	5	6
7	7	8	9	10	11	12
8	14	15	16	17	18	19
9	21	22	23	24	25	26
10	28					

March, 2010

S	M	T	W	T	F	S
10	1	2	3	4	5	6
11	7	8	9	10	11	12
12	14	15	16	17	18	19
13	21	22	23	24	25	26
14	28	29	30	31		

April, 2010

S	M	T	W	T	F	S
14				1	2	3
15	4	5	6	7	8	9
16	11	12	13	14	15	16
17	18	19	20	21	22	23
18	25	26	27	28	29	30
19	2	3	4	5	6	7

Select one week:

Bold Date means that entries are present.



Work Week



WinYou Law Calendar

Insert [JC;JL]

1 Day Week Work Week Month Year TimeGrid

	JC					JL				
	Mon, Jan 25	Tue, Jan 26	Wed, Jan 27	Thu, Jan 28	Fri, Jan 29	Mon, Jan 25	Tue, Jan 26	Wed, Jan 27	Thu, Jan 28	Fri, Jan 29
7:00								Tel Mr Br	Contract	
8:00										
9:00			Directors meeting							Meeting Smith
10:00										
11:00										
12:00 pm										
1:00										
2:00								Meeting with Lang (Hotel) Documents!		
3:00										
4:00										
5:00										
6:00										

January, 2010

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February, 2010

S	M	T	W	T	F	S
6	1	2	3	4	5	6
7	7	8	9	10	11	12
8	14	15	16	17	18	19
9	21	22	23	24	25	26
10	28					

March, 2010

S	M	T	W	T	F	S
10	1	2	3	4	5	6
11	7	8	9	10	11	12
12	14	15	16	17	18	19
13	21	22	23	24	25	26
14	28	29	30	31		

April, 2010

S	M	T	W	T	F	S
14				1	2	3
15	4	5	6	7	8	9
16	11	12	13	14	15	16
17	18	19	20	21	22	23
18	25	26	27	28	29	30
19	2	3	4	5	6	7

Select one work week

Bold Date means that entries are present.





Month

1 Day Week Work Week **Month** Year TimeGrid

WinYou Law Calendar

Insert JL

1 Day Week Work Week **Month** Year TimeGrid

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday
December, 28	29	30	31	January, 1	2
4	5	6	7	8	9
11	12	13	14	15	16
18	19	20	21	22	23
25 9:00am Review	26	27 Tel Mr Brown 12:00pm Meeting with	28 Contract (Draft)	29 9:00am Meeting Smith	30
February, 1	2	3	4	5	6
					7

December, 2009
S M T W T F S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31

January, 2010
S M T W T F S
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31

February, 2010
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28

March, 2010
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31 1 2 3
4 5 6 7 8 9 10

Select one Month

Bold Date means that entries are present.





1 Day
Week
Work Week
Month
Year
TimeGrid

WinYou Law Calendar

+ Insert
JL

1 Day
Week
Work Week
Month
Year
TimeGrid

2010	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M									
January							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
February	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28											
March		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31							
April				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						
May					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
June			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30							
July				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
August	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31								
September				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						
October					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
November		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30								
December				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					

December, 2009

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January, 2010

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February, 2010

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

March, 2010

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10



TimeGrid



The example shows the time grid of two users

The screenshot shows the WinYou Law Calendar interface in TimeGrid mode. The main grid displays two users' schedules for Wednesday, January 27, 2010, and Thursday, January 28, 2010. The time slots range from 7:00am to 9:00pm. User 'JC' has a yellow appointment titled 'Directors meeti' on Wednesday from 8:00am to 9:00am. User 'JL' has a yellow appointment titled 'Meeting with Lang (Hotel)' on Thursday from 12:00pm to 2:30pm. A tooltip for this appointment provides details: Project: Acme Corporation / Acme Share Purchase, Subject: Meeting with Lang, Location: Hotel, Message: Documents!, Time: 12:00pm-2:30pm. The interface includes navigation buttons for Day, Week, Work Week, Month, Year, and TimeGrid, along with a search bar and a calendar overview on the right side.

TIP: You can move entries between users.



View

Save Filter

Saves user settings for the tasks list



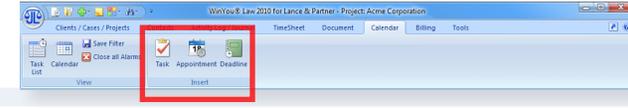
Close all Alarms

Closes all Alarm Windows.

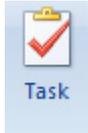




Insert

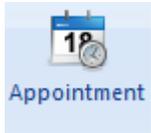


Task / To Do

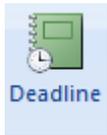


- Date:** Select the desired Date
- User:** The login user is proposed automatically.
- Reminder:** Enter the number of days. During this period the Activity Log entry is displayed in a warning color.
- Done:** Activate check box, when the task is finished – color display in the Activity Log changes automatically.
- Note:** Enter here as much text as you like. This text will be displayed in the Activity Log.
- Outlook** If checked then task is automatically entered in Outlook.

Appointment



- Date:** Select the desired Date
- User:** The login user is proposed automatically.
- Subject:** Subject
- Location:** Location
- Time:** Time of the appointment.
- Completed:** Activate the check box, when the appointment is done the display color in the Activity Log changes automatically.
- Reminder:** Activate the check box, if you want to be reminded of the appointment.
- Hours** Enter here how long before the appointment you want to (before app.): be reminded.
- Note:** Enter here as much text as you like.
- Category:** Category.
- Show as:** Show as in Calendar: (Free, Tentative, Busy, Out of Office).
- Outlook** If checked then appointment is automatically entered in Outlook.

Deadline

Date:	Select the desired Date (click on the small date icon or type it directly, standard display is today's date).
User:	The login user is proposed automatically.
Reminder:	Enter the number of days. During this period the Activity Log entry is displayed in a warning color.
Done:	Activate check box, when the deadline is finished – color display in the Activity Log changes automatically.
Note:	Enter here as much text as you like. This text will be displayed in the Activity Log.
Outlook	If checked then deadline is automatically entered in Outlook.

Deadline

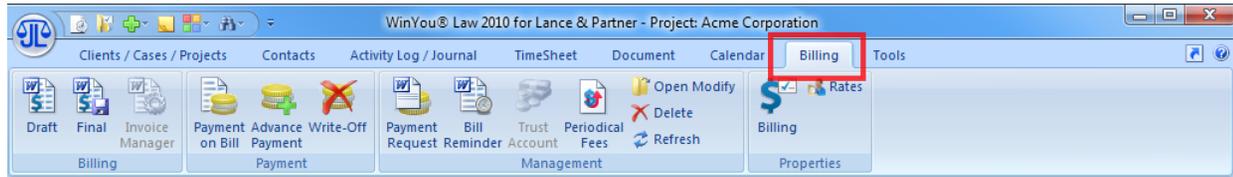
Deadline Date: 1/25/2010 Owner: John Lance OK

Reminder: 0 Days before Completed Cancel

Subject / Notes: Outlook

Billing

Under this tab, bills are automatically created according to your specifications.



Bill

Date: 1/24/2010 Template: Detailed Draft Bill

OK Cancel

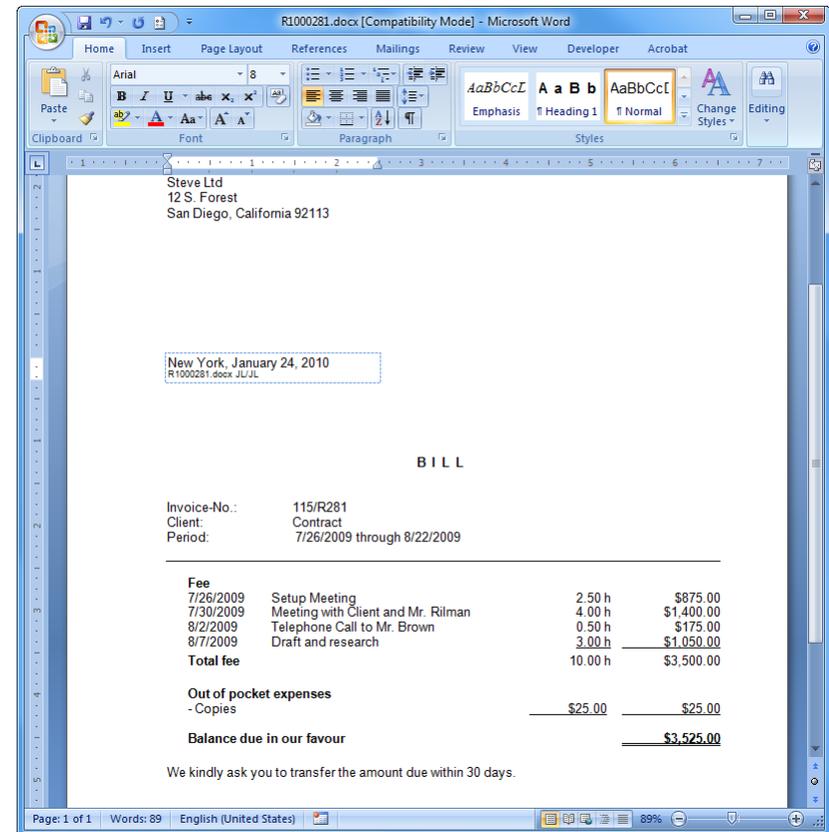
Date: 7/26/2009 - 8/22/2009		USD
Fee - 10.00 hour		3,500.00
- Telephone, Fax, Postage, Travel, etc.	25.00	
Total Expenses		25.00
* Total		3,525.00
** Total Amount		3,525.00

Period Hourly Rates Sales Tax Expenses... Documents

Currency: USD Exch. Rate: 0.0000 Calculate

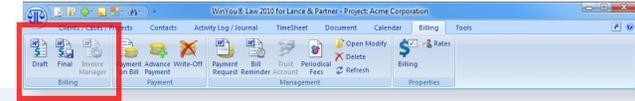
Include non-billable hours Interim Bill

Text:

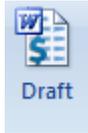




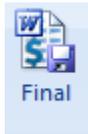
Billing



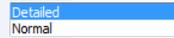
Draft



Final



Template: This is the default template for the selected project. You may select a different template.



- **Final:** The bill is saved, all related records (fees, expenses, payments) are assigned to this bill and marked as billed.
- **Draft:** Bill is generated but not saved. The draft bill creates a document in Word without saving it. All entries remain "unbilled".

Overview of all open fees, expenses and advance payments. If you double click on an item, then this item is disabled in this bill.

Bill

Date: 1/24/2010 Template: Detailed Draft Bill

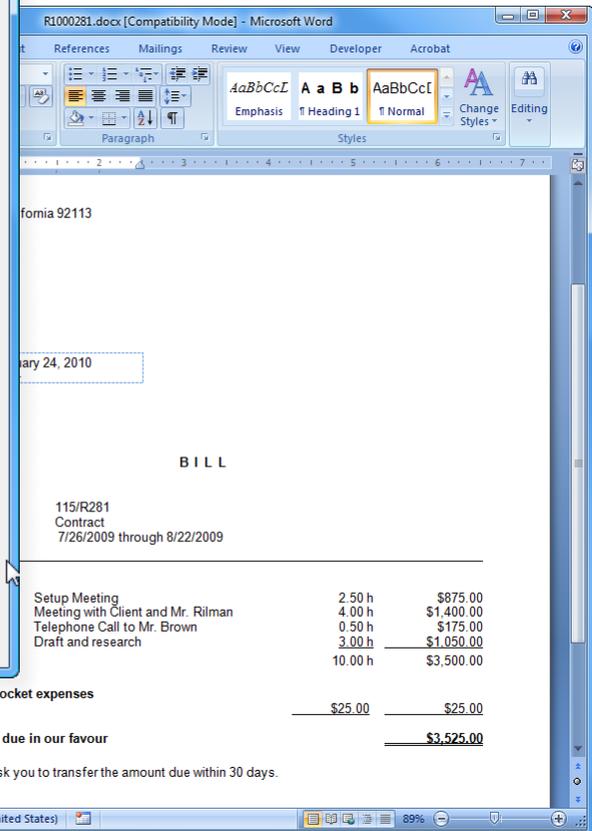
OK Cancel Period Hourly Rates Sales Tax Expenses... Documents

Date: 7/26/2009 - 8/22/2009		USD
Fee - 10.00 hour		3,500.00
- Telephone, Fax, Postage, Travel, etc.	25.00	
Total Expenses		25.00
* Total		3,525.00
** Total Amount		3,525.00

Currency: USD Exch. Rate: 0.0000 Calculate

Include non-billable hours Interim Bill

Text:



Date	Type	Info	Ow...	Text
1/24/2010	Request ...	KV000282.docx	JL	
1/24/2010	Bill	3525.00 R100028...	JL	
8/22/2009	Copies	25.00	JL	
8/7/2009	3.00 hrs	1050.00	JL	Draft and research
8/2/2009	0.50 hrs	175.00	JL	Telephone Call to Mr. Brown
7/30/2009	4.00 hrs	1400.00	JL	Meeting with Client and Mr. Rilman
7/26/2009	2.50 hrs	875.00	JL	Setup Meeting

Period

Period
 Hourly Rates
 Sales Tax
 Expenses...
 Documents
 Currency: USD
 Exch. Rate: 0.0000
 Calculate

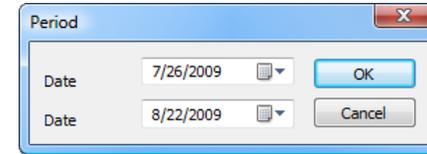
Automatically all open fees and expenses are shown. Before you define the time period for the work you want to invoice, decide whether you want the Non-billable Hours (entries with rate 0 and amount 0) to be included or not, by activating/deactivating the check box.

Date from: Enter the desired date for the first billable entry.

Date to: Enter the desired date for the last billable entry.

Close with the OK button.

WinYou Law displays immediately the selected time period and the corresponding entries.



Hourly Rates

Period
 Hourly Rates
 Sales Tax
 Expenses...
 Documents
 Currency: USD
 Exch. Rate: 0.0000
 Calculate

In this dialog you can change the fee rate and the fee total for the selected time period. The number of hours cannot be modified. If you want to include the Non-billable Hours, you have to activate the check box.

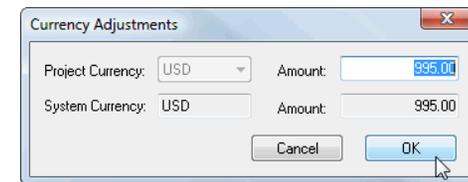
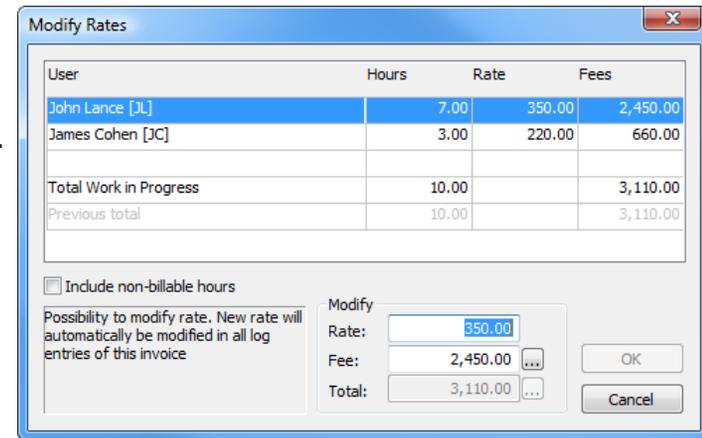
1. Press on the button Hourly Rates and the window Modify Rates is displayed.
2. Select the user, whose rate or fee you want to change and perform the changes in the field Rate or Fee at the window bottom.
3. If you want to modify the total amount, select the line *Total and enter the new amount at the window bottom. The rates and fees of the users are adapted automatically and the previous Total remains listed as a piece of information.

Close with the OK-button.

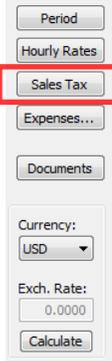
Hourly Rate in a foreign currency (Option)

You can modify the rates and fees per user in the project currency. Proceed as follows:

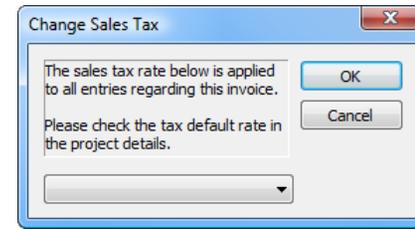
1. Press the button next to the fields Fee or Total and the Dialog Currency Adjustments is displayed.
2. Modify the amount in the project currency by overwriting it.
3. Press the OK-button and the modified amount is listed in the system currency in the window Modify Rates.



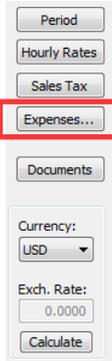
Sales Tax / VAT



Press the button "TAX" and the dialog Change Tax is displayed.
 Press the arrow-button and select the new VAT-rate. Attention: you cannot undo this modification.
 Close with the OK-button.
 All the Tax-rates are changed except the fixed Tax-rates of expenses.

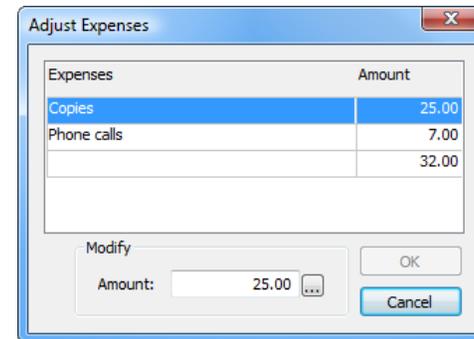


Expenses

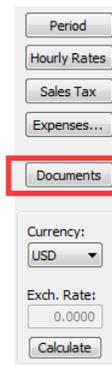


In this dialog you can modify the total amount per type of expense. The overall total cannot be modified, you have to change the different type of expenses.

1. Press the button EXPENSES
2. Select the type of expenses you want to modify and type the new amount in the field Amount.
3. Close with the OK-button.

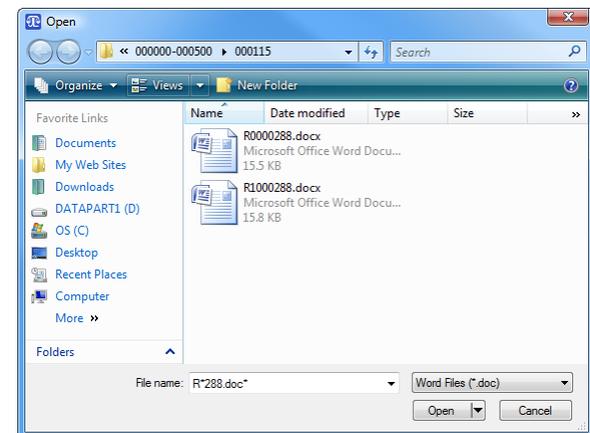


Documents



Shows all generated bills with the actual bill number and you can open the bill document directly.

If the bill document exists with several templates, e.g. Normal = R0000374.doc and Detailed = R1000374.doc, WinYou Law displays a selection dialog.



Currency

Period
Hourly Rates
Sales Tax
Expenses...
Documents

Currency:
USD

Exch. Rate:
0.0000

Calculate

Bill with foreign Currency (Option)

If a foreign currency has been selected as project currency, it is automatically displayed, when you create an invoice. The amounts are listed according to the standard exchange rate of the corresponding currency.

To change currency or exchange rate, you have to adapt the following fields:

Currency: Standard display is the project currency. Select the desired currency.

Exch. Rate You can overwrite the displayed exchange rate in this field.

Calculate: If you press this button, the system calculates the new amounts and displays them automatically.

The advance payments are not concerned by exchange rate modifications at the creation of a bill.

Invoice Manager



Automatic Billing (Option)

With the Invoice Manager, you will be assisted in mass billing. In one step, you create invoices for all open, non-billed services. You decide the number of copies printed, and whether you want to print draft or final bills.

Different Filters:

- Responsible
- Date from to
- Amount
- Office
- Language
- Interval

Various commands directly available



Important Details for each Project



The screenshot shows the InvoiceManager application window. At the top, there's a title bar and a menu bar. Below that is a list of projects under the heading 'Offene, nicht verrechnete Leistungen'. The list has columns for Projekt, Verantwort., Von, Bis, Offen, Rech.Formu., Drucken, and Bearbeitung. The selected project is 'Stauffler AG, Langenthal / Grundstückkauf'. Below the list, there are several buttons: 'Bearbeiten', 'Projekt öffnen', 'Ansätze ändern', 'E-Mail senden', 'Liste drucken', 'Alles', and 'Selektion'. The main area shows details for the selected project, including 'Durchschnittliche Stundenansätze pro Erfasser' and 'Letzte Rechnungen / Mahnungen'. There are also sections for 'Total pro Auslagetyp' and 'Vorauszahlungen'. On the right side, there is a 'Filter:' panel with dropdown menus for 'Verantwortliche', 'Leistungen von', 'Leistungen bis', 'Betrag grösser als', 'Standort', 'Sprache', and 'Rechnungsintervall'. Below the filter panel are buttons for 'Aktualisieren', 'Rechnungen erstellen' (with sub-buttons 'Entwürfe', 'Definitive', 'Abbrechen'), and 'Schliessen'.

Projekt	Verantwort.	Von	Bis	Offen	Rech.Formu.	Drucken	Bearbeitung
Amacher AG, Basel	WJ	25.01.2008	25.01.2008	517.50	Detailliert	<input type="checkbox"/>	
Benz Jürg, Montlingen	AS	03.06.2009	03.06.2009	48.75	Detailliert	<input type="checkbox"/>	
Berner Lisa, Zürich	JL	15.11.2009	15.11.2009	585.00	Normal	<input type="checkbox"/>	
Berner Peter, WJ SG / Unterschlagung	CK	04.04.2007	08.05.2007	1'223.50	Detailliert	<input type="checkbox"/>	
Brösel Markus, Märstetten Dorf / brösel general	JL	06.03.2006	06.03.2006	819.00	Detailliert	<input type="checkbox"/>	
CI Treuhand AG, Baar	JL	27.10.2006	16.01.2007	999.00	Detailliert	<input type="checkbox"/>	
Egli Erika, Wetzikon ZH	AS	23.05.2007	01.06.2007	1'750.00	Detailliert	<input type="checkbox"/>	
Fabu AG, Zürich / Beratung	AS	17.11.2009	17.11.2009	405.00	Detailliert	<input type="checkbox"/>	
Fabu AG, Zürich / Sachbeschädigung	JL	17.03.2006	15.12.2006	7'409.10	Detailliert	<input type="checkbox"/>	
Geissbühl Christa, Rümlingen	WJ	26.01.2007	21.03.2007	798.75	Detailliert	<input type="checkbox"/>	
Gloor AG, Dättlikon	WJ	25.02.2009	03.06.2009	103.40	Detailliert	<input type="checkbox"/>	
Haus AG, Hirzel / Stockwerkeigentum	AS	03.06.2009	03.06.2009	316.50	Detailliert	<input type="checkbox"/>	
Kobler Linus, Berikon	WJ	21.03.2007	21.03.2007	48.75	Detailliert	<input type="checkbox"/>	
Lüthy Rosa, Wohlen AG	WJ	21.10.2008	21.10.2008	81.90	Detailliert	<input type="checkbox"/>	
Muster Ralf, Zürich / Ehescheidung	CK	29.05.2007	30.05.2007	399.00	Detailliert	<input type="checkbox"/>	
Stauffler AG, Langenthal / Grundstückkauf	JL	28.03.2006	28.03.2006	390.00	Detailliert	<input type="checkbox"/>	



Payment



Payment on Bill



Advance Payment



Write-Off



Overview over all open bills

Payment

Date: 1/25/2010 Payment OK Cancel

Open Invoices:

Number	Date	Amount	Amount
288	25.01.2...	3,142.00	3,142.00

Accounting program
D
C

Currency: USD Exch. Rate: 0.0000 Amount: 0.00

Amount: 3,142.00 Inv.: 288

Text: Project:

- **Payment:** If you select Payment or Write Off, the window Open Invoices will be enabled. With a double click on the selected Bill, all data like Amount and Bill No. will be automatically filled in. If part payments have already been done, WinYou Law will automatically fill in the difference.
- **Advance Payment**
If you select Advance Payment / Payment on Account, you just fill in the Amount. This will be automatically recognized in the next Bill.
- **Write-Off**

!	Date	Type	Info	Ow...	Text
	1/25/2010	Bill	3142.00 R0000...	JL	
	1/25/2010	Payment	3142.00	JL	
	1/25/2010	Phone calls	7.00	JL	
	8/22/2009	Copies	25.00	JL	
	8/7/2009	3.00 hrs	660.00	JC	Draft and research
	8/2/2009	0.50 hrs	175.00	JL	Telephone Call to Mr. Brown
	7/30/2009	4.00 hrs	1400.00	JL	Meeting with Client and Mr. Rilman
	7/26/2009	2.50 hrs	875.00	JL	Setup Meeting
	1/24/2010	Request on	KV000282 doc	II	



Management

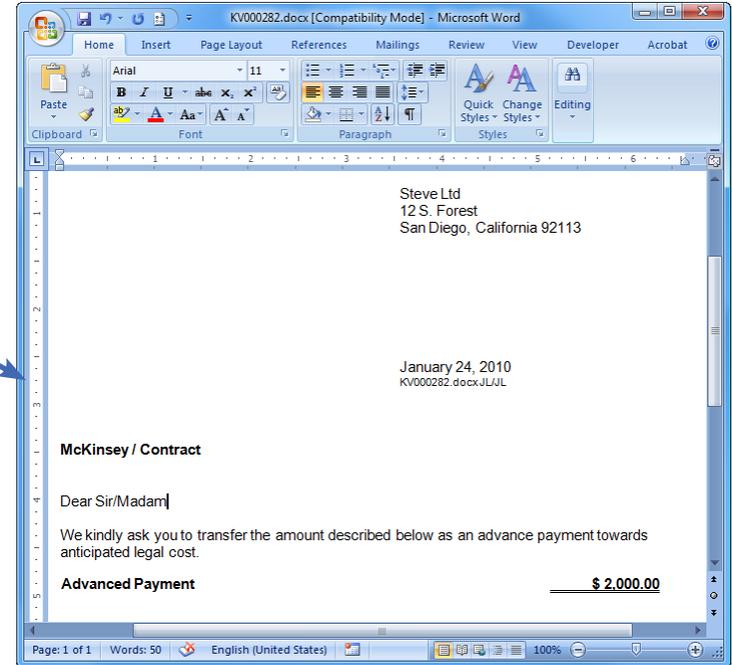


Payment Request

Create an advance request in a Word Document



- Date:** Select the desired Date. Standard display is today's date.
- Amount:** Insert the amount. If some work has already been recorded, a proposal is displayed. You can overwrite it.
- Tax:** Select the Tax-rate by clicking on the corresponding field.
- Text:** Enter in this field any text you want. You can use shortcuts.



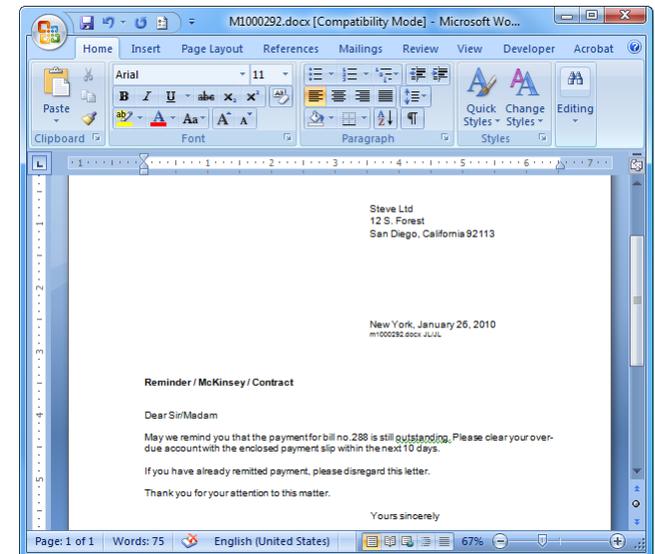
The document is now created in Word and can be edited. It is saved automatically and registered in the project.

Bill Reminder



- Date:** Select the desired Date. Standard display is today's date.
- Amount:** Enter the amount.
- Type:** Select the type of reminder by clicking on the field and on the corresponding line (selection possible, if several types have been installed.)
- Deadline:** Insert the Deadline in the corresponding field.
- Text:** In the text field you can enter any text you want. You can use shortcuts.

The document is now created in Word and can be edited. It is automatically saved and registered in the project.



Trust Account



Third Party Funds / Clients' Account Entry (optional)

Enter the amount in the amount field. Payment: If you want to enter a payment, you enter the amount with a minus-sign in front, e.g. -10'000.00.

In the summary window you will always see the actual status.

Payment on Invoice / Clients' Account for advance payments

Activate the check box "Credit". Enter the amount.

Click on the button "Create Payment". The payment / advance payment is created automatically.

Paying own Bills

Current balance

Summary - Project: McKinsey...

Type	Amount
Hours	7.00
Fees	2,450.00
Expenses w/o Fl...	8.00
Sales Tax	0.00
Total Work in Pr...	2,458.00
- Payments on A...	3,142.00
- Write Off	0.00
Work in Progres...	-684.00
Invoiced	3,142.00
- Payments recei...	0.00
** WIP + A/R	2,458.00
Client's Account	1,358.00

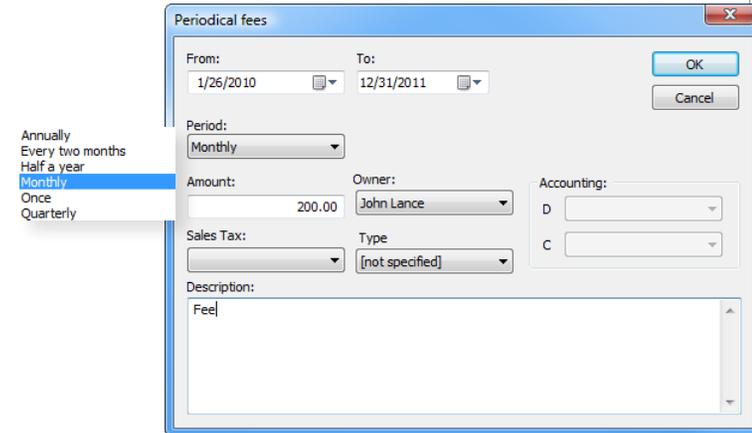
Date	Type	Info	Ow...	Text
1/26/2010	Clients a...	-3142.00	JL	Bill 288
1/13/2010	Clients a...	-500.00	JL	Cash
1/5/2010	Clients a...	5000.00	JL	Payment

Periodical Fees

An overview over all periodical fees for this project will be shown. Press "New" to enter a new periodical fee.



- From:** Type the starting date.
- To:** Type the ending date.
- Period:** Select the desired periodicity.
- Amount:** Type the amount you want to be invoiced.
- Tax:** Select the desired Sales Tax or VAT-rate with the arrow-key.
- Owner:** Select the desired user with the arrow-key.
- Type:** Select the desired type of periodical fee with the arrow-key.
- Description:** Enter the text to be displayed.





Properties



Billing

With the different billing properties you have the possibility for different settings.



Detailed information [Contract]

General User **Billing** Rates Keywords Security

Hourly rate: 0.00

Price per copy: 0.00

Price per mile: 0.00

Budget: 0.00

Internal Project

No Accounting

Billed / Locked

Type of bill: Individual

Bill fom: Detailed

Sales Tax:

Invoice Interval: Weekly

Currency: USD

Apply

Rates

Change the default rates for the users within selected project.



Detailed information [Contract]

General User Billing **Rates** Keywords Security

User	Rate
John Lance	280.00

User... Rate

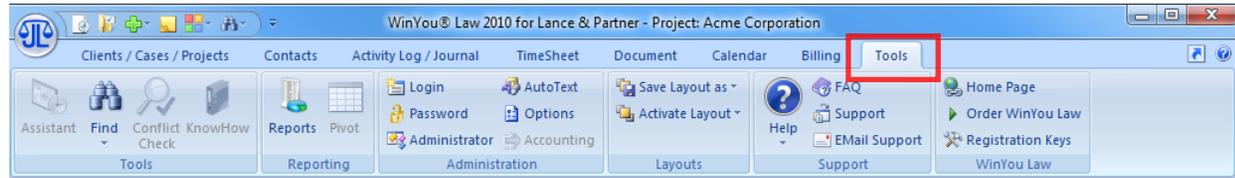
Apply

Possibility to define individual rates for this project only.

Tools

Introduction

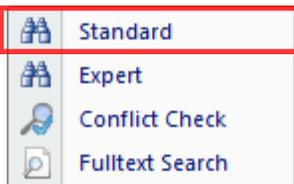
Here are the different functions, they are independent of a project, eg find, reporting or program options.





Tools

Find Standard



The Search was specially created for comfortable and quick search procedures. In standard mode, you can search according to predefined criteria, in Expert, Conflict Check and Full Text Search (Option) you can search with individual criteria. Those criteria can differ from our description, depending on the settings in your database.

You can work with WinYou Law and Search at the same time.

- In the Project fields you can enter the following criteria:

Project Number Enter the project number.

Project Name Enter the project name or parts of it (e.g. int.)

- In the Address field you can enter the following criteria:

Company The search is performed in: company name or first name. Enter the company name, or, in case of a personal address, the first name.

Name The search is performed in: second line of the company name or last name. Enter the second line of the company name or the last name of a person.

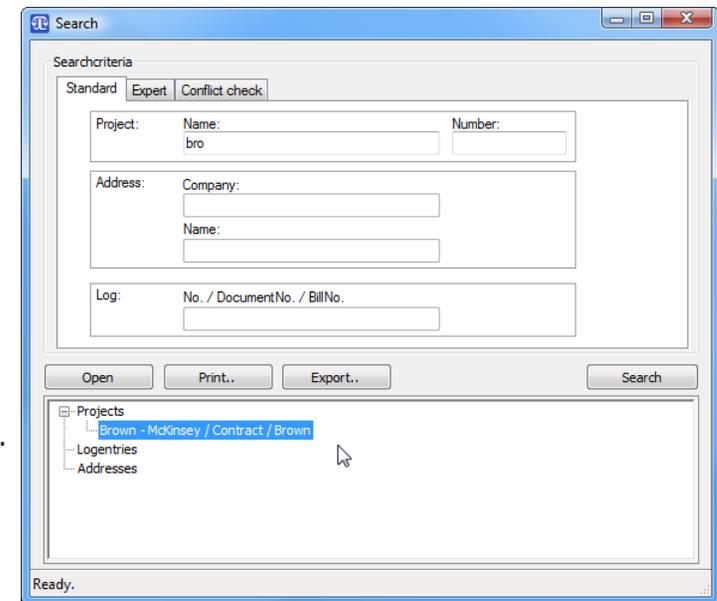
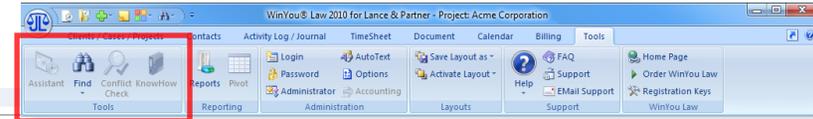
- In the Activity Log field you can enter the following criteria:

Invoice Enter the invoice number (e.g. 2381 for I0002381)

Document Enter the document number (e.g. 5691 for L0005691)

Activity Log entry Enter the Activity Log number (e.g. 356)

After having entered the desired data you click the button "Search" or use the "enter" key. Select and double click the desired entry or click on the button "Open". The Project is automatically opened in WinYou Law and selected.



You can use wildcards. The character "%" or "*" allows you to search for text parts. Thus the statement, "%a" found in the Project Name field, all projects that contain 'a' in the name

Find Expert



1. Select and double click a search criteria (you can use the arrow-key.) Your selection is displayed immediately.
2. Select the conditions. The conditions vary according to the criteria. They can signify e.g. a selection (address codes, language, search words etc.), a date or a time period (between... and ...), a text etc.
3. To start the search you press the button Search.
4. Select and double click the desired entry or click the button "Open".
5. The desired item is automatically highlighted in WinYou Law and can be opened by a double click.

Info: If you want to deactivate a search criterion or delete it, select it in the window and click on the arrow-button. If you want to deactivate all the search criteria, click the double-arrow-button.

E.g., if you are looking for a telephone number, you can enter it with a percent-sign in front and behind: %211 05% (in the Access-version, instead of the %-sign, you type a star *.)

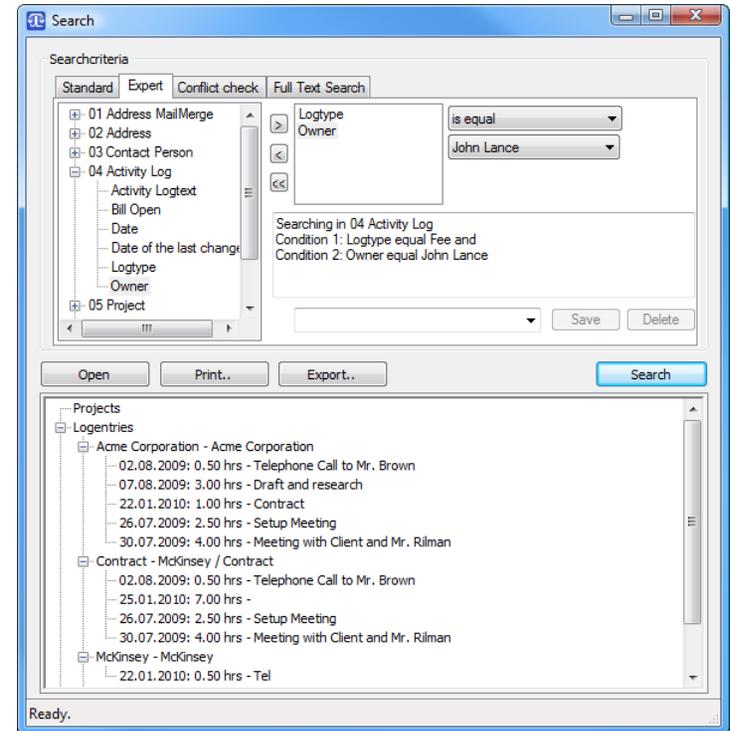
Combine search criteria

You can combine certain search criteria, e.g. in the Activity Log section: date of a Activity Log entry and Activity Log text.

Save Expert Search

You can save your single search configurations. Proceed as follows:

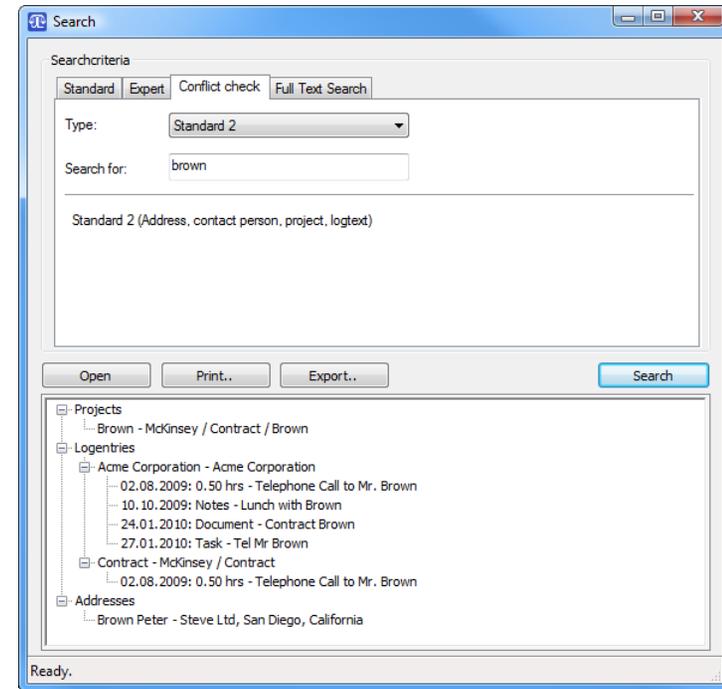
1. Select and double click a search criterion (you can assign it with the arrow-key.) Your selection is displayed.
2. Select the conditions.
3. In the field at the left of the button "Save" you enter the title of the search.
4. Click on the button "Save".



Search**Conflict Check**

1. Select the type of search in the field "Type".
2. In the field "Search" enter the search criteria.
3. Click on the button "Search" to start the conflict check.
4. Select and double click the desired entry or click the button "Open".
5. The desired item is automatically selected in WinYou Law and you can open it with a double click.

You can combine the search criteria for a conflict check individually, e.g. following the proposals of the Administrator.



Fulltext Search

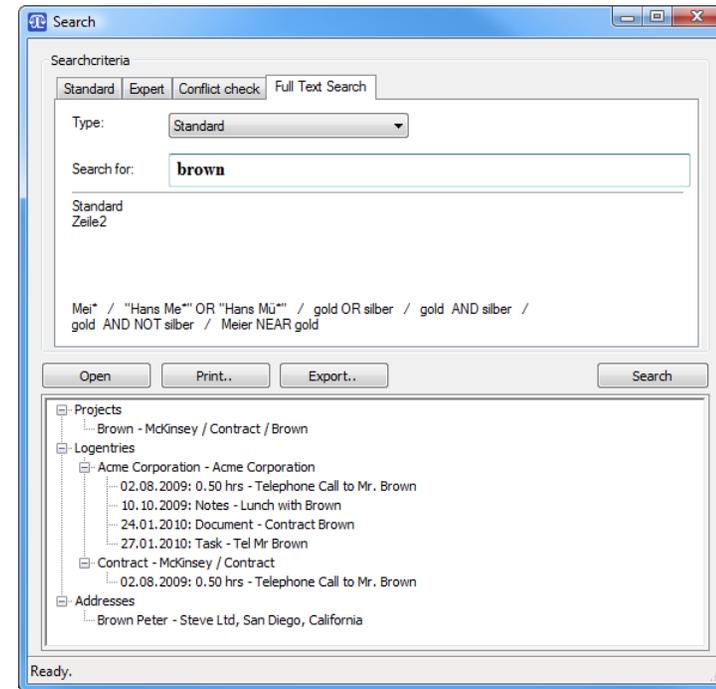


Full-Text Search (Optional)

1. Select the search type in the field "type".
2. Enter the search definitions in the field "Search for". You can find examples for these entries in the Full-Text Search mask.
3. Click the button "Search" to start the search.
4. Select and double click the desired item or click the button "Open".
5. The desired item is automatically selected in WinYou Law and you can open it with a double click.

Print the search result

You can print the search results in a list-template by clicking the button "Print" after the search is performed.





Reporting

Reports



Reports

Standard Reports

- Total Fees per Project
- Detailed Fees per Project
- Detailed Fees per Day

Projects

- List of Projects

Total Fees per Project

Select Period: From: To:

Year to Date 1/ 1/2010 12/31/2010

Select Fee Owner(s): JC, JL, PS, TS

Select Fee Status: Open Fees, Billed Fees

Select Project Status: Active, Inactive, Internal, External

Generate Report

Print Preview

100% 1 Close

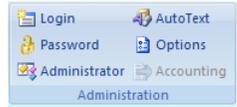
- Main
- Acme Corporation
 - Page 1
- Acme Corporation / W
 - Page 1
- McKinsey
 - Page 1
- McKinsey / Contract
 - Page 1

Total Fees per Project

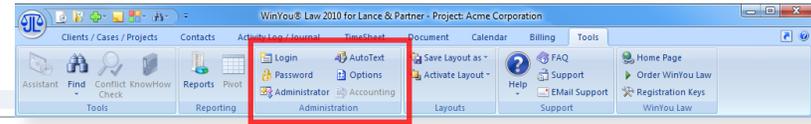
	Hrs.	Fees
Acme Corporation	1.0	350.00
Acme Corporation / Widget Manufacturing / test	5.0	1,750.00
McKinsey	0.5	175.00
McKinsey / Contract	7.0	2,450.00
13.5		4,725.00

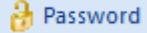
Lance & Partner

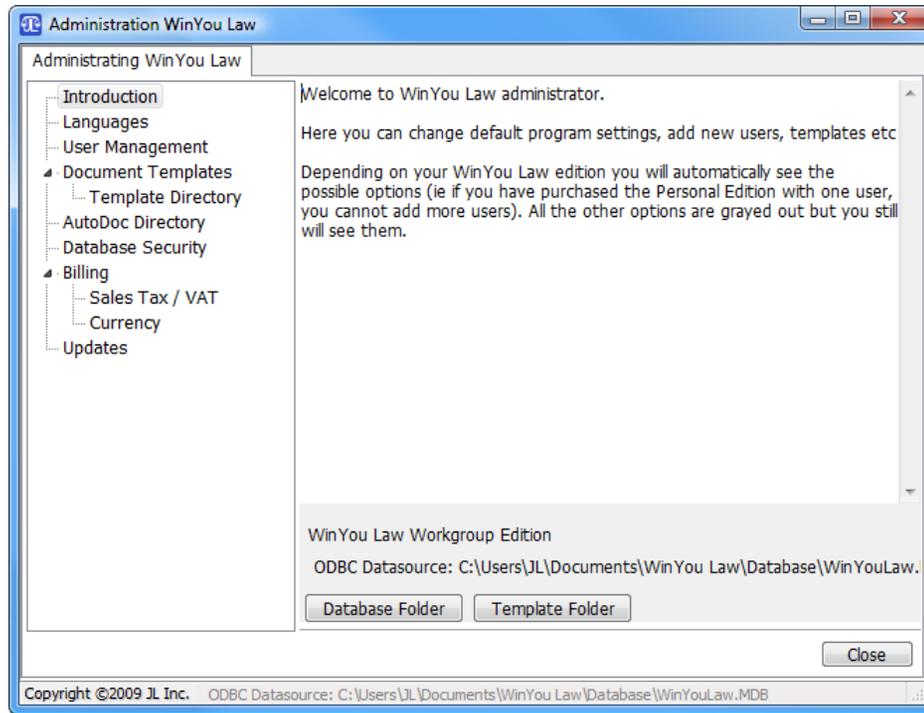
Page 1 of 1



Administration



<p>Login</p> 	<p>Allows the user to login to another Database.</p> 
<p>Password</p> 	<p>When this feature is activated, the user has the possibility to change his password himself.</p>

Administrator

AutoText

You can use shortcuts in all Text fields of WinYou Law and in the TimeSheet. You can use the same shortcut for all languages. The shortcut is automatically entered in the correct language (project language). The shortcut text can contain up to 255 characters.

Select the language with the button "Language".

Create Shortcuts

1. Type the new Shortcut in the field "Replace"
2. Type the full text you want to be displayed in the field "With"
3. Click on the button "Add" to save the new shortcut

You can change the language of the shortcut you want to create with the button "Language".

Modify Shortcuts

Double click the desired shortcut in the list. Modify the shortcut and/or the text in the "Replace" and "With" field

Save the modification with "Modify".

Delete Shortcuts

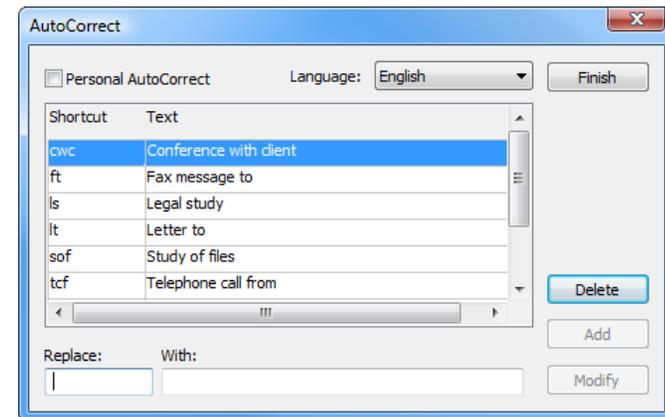
Select the desired shortcut and click on "Delete".

Personal Shortcuts

Activate the check box "Personal AutoCorrect" Now you will see your personal shortcut list.

The personal Shortcut overrule the system shortcuts. To add or change personal shortcuts proceed as described above.

Your administrator can disable the modify of system shortcuts.



**Options:
General**

File filing If you want to register a new project as a link document, you can enter the path in this field.

Check Reminders Type the interval for checking the reminders.

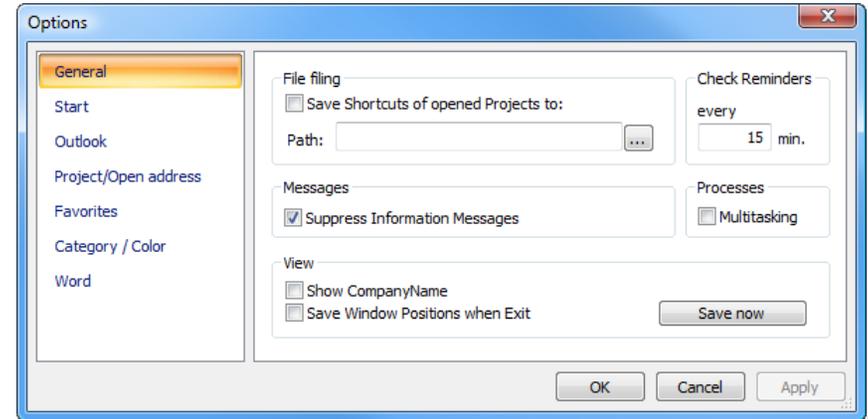
Messages Deactivate the check box, if you want to get more detailed Messages.

Processes System configuration. Do not modify.

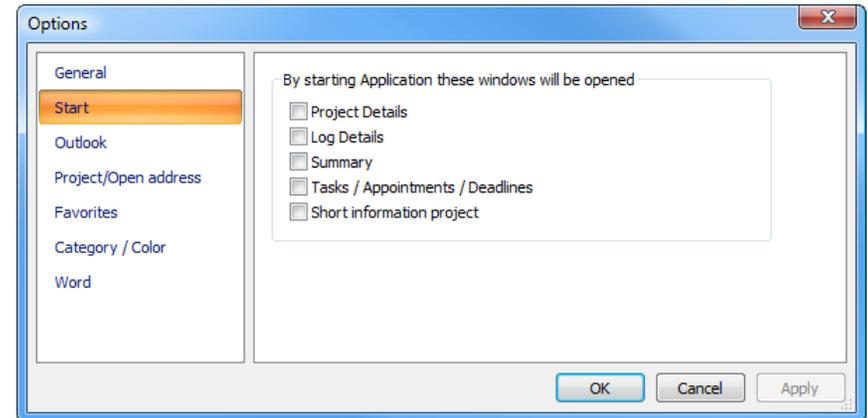
Show Company Name Activate the check box if you want the Company name to be displayed, e.g. in the Document Control Center, TimeSheet etc.

Save Window Position when Exit: If you activate the check box, the window position is saved when you close the program.

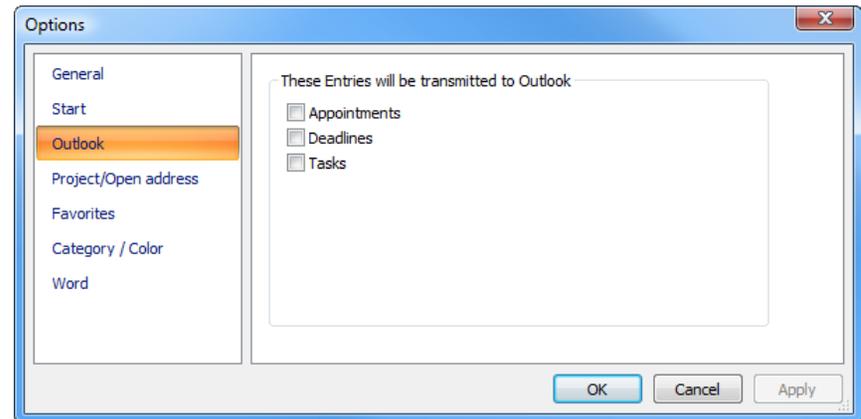
Save now: Click here if you want to save the current window position of WinYou Law.

**Options:
Start**

Activate the check boxes of the desired options.

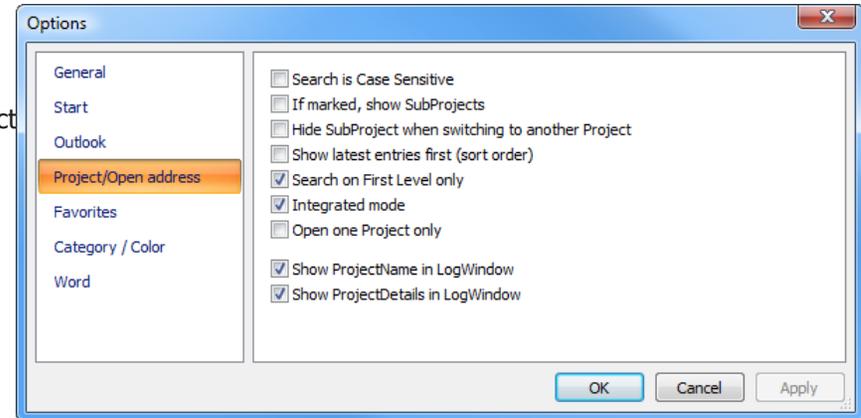


Options: Outlook Select the Activity Log-types (Appointment, Deadline or Task) you want to be transmitted to Outlook.



Options: Project / Open Address

- Search is Case Sensitive** Activate if you want the exact typing-mode to be considered.
- If marked, show SubProjects** Activate if you want the subprojects to be displayed automatically.
- Hide SubProject when switching** Activate, if you want the subprojects to be hidden, when you go to another project
- Show latest entries** Activate, if you want the most recent entries to be displayed on top of the Activity Log.
- Search on first level only** Activate if you want the search to be performed always in the first project level, only.
- Integrated mode** Activate for integrated project overview.
- Show one Project** Activate if you want only one project to be opened.
- Show ProjectName** Activate if you want to display the project name in the Activity Log window.
- Show ProjectDetails** Activate if you want to display the project details (name, address etc.) in the Activity Log window.



Options: Favorites**Options: Category / Color**

Press the button Color to select the color. In the following window you mark the desired color and confirm with OK.

In the field "Sample" a preview is displayed.

You can assign a color to the following items:

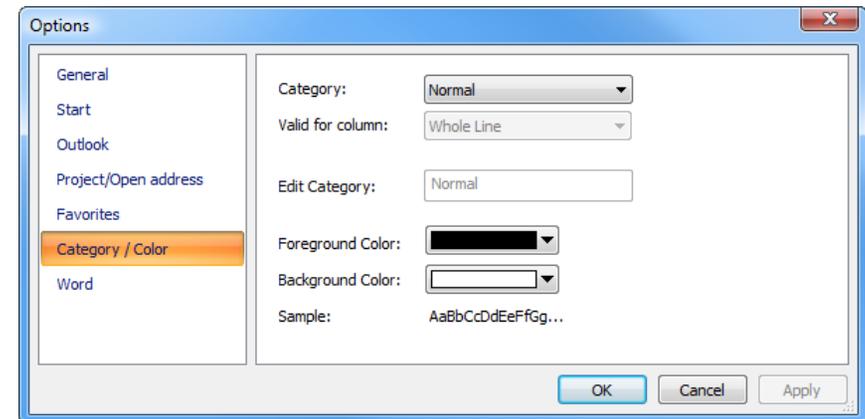
Activity Log status Select the desired Activity Log status - e.g. invoiced.

Valid for column Select the desired item - e.g. Whole Line.

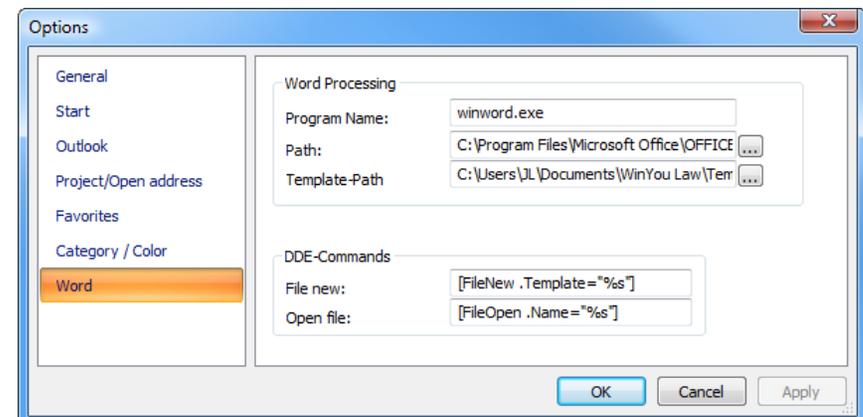
Example Preview with selected color.

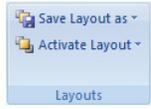
Color of text Activate check box to apply the color on the text.

Background color Activate check box to apply the color on the background.

**Options: Word**

All configurations are predefined - normally there is no need to modify them.

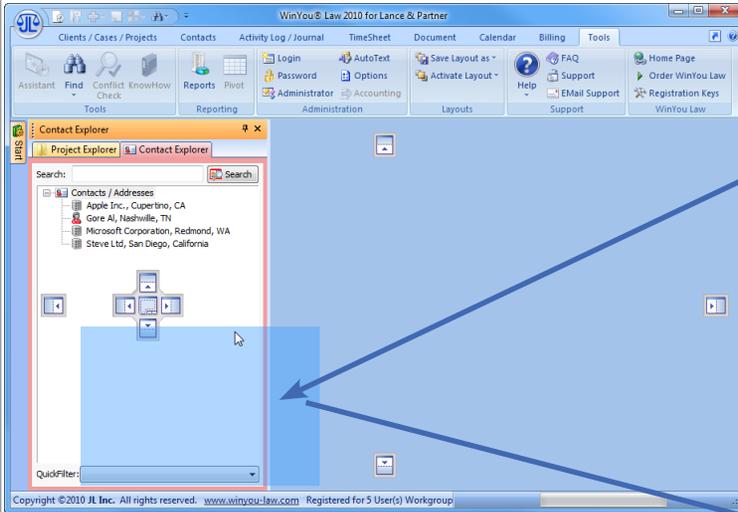
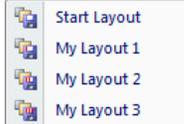




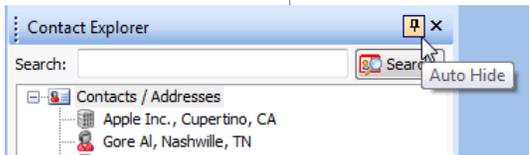
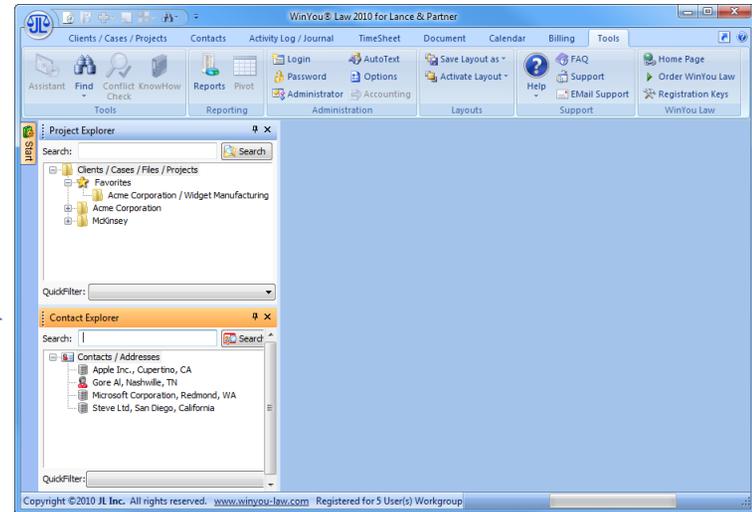
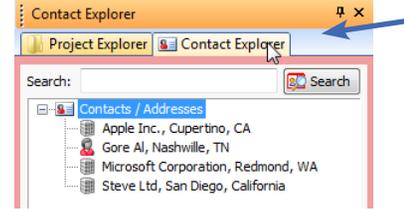
Layouts

Save Layout

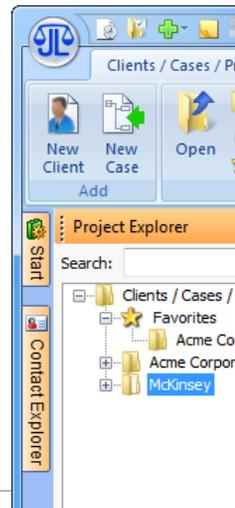
You have the possibility to save and activate different layouts (including the color scheme). "Start layout" is used when the program starts.



Press and hold the left mouse button on a header (in this case the contact Explorer). Drag the header to the new desired location. Miscellaneous "arrows" appear as a tool for the move. You can draw directly on these arrows, or place the window directly.



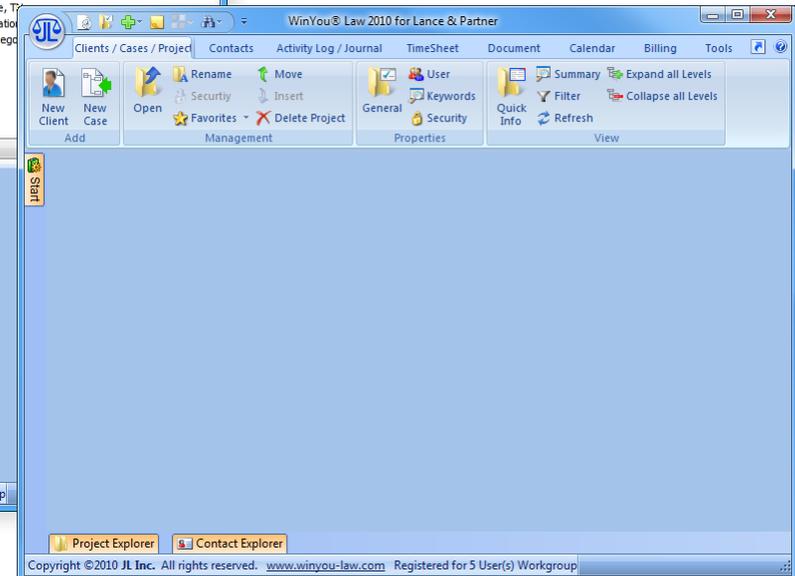
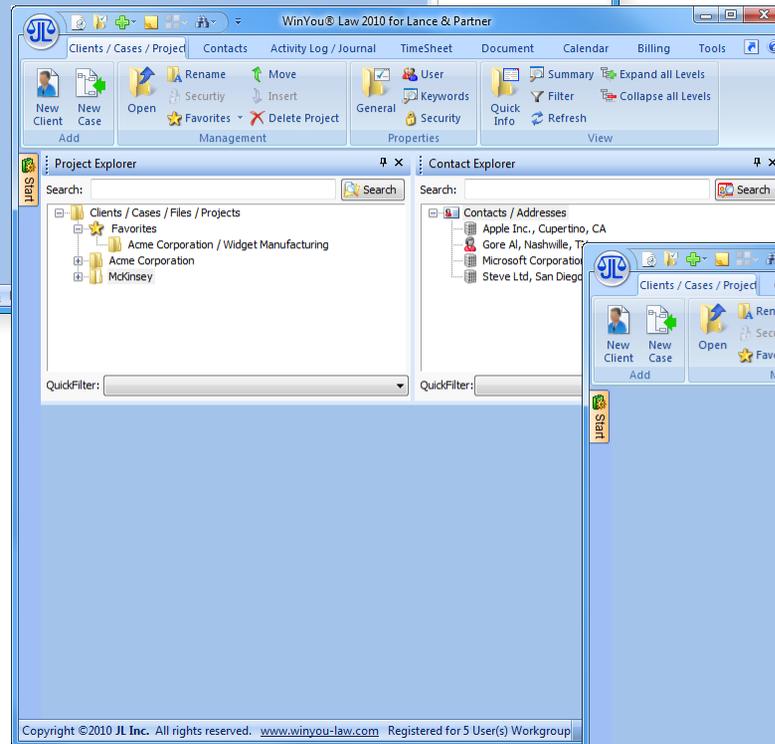
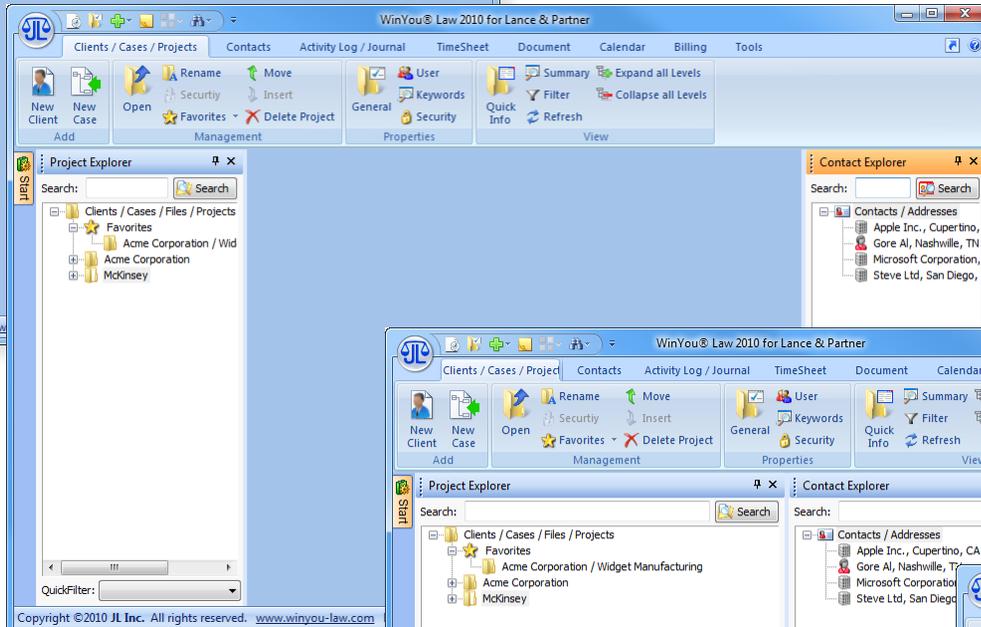
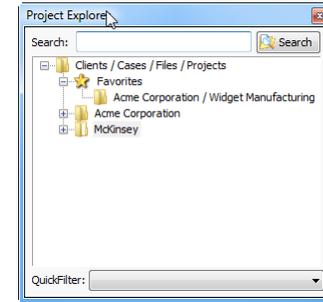
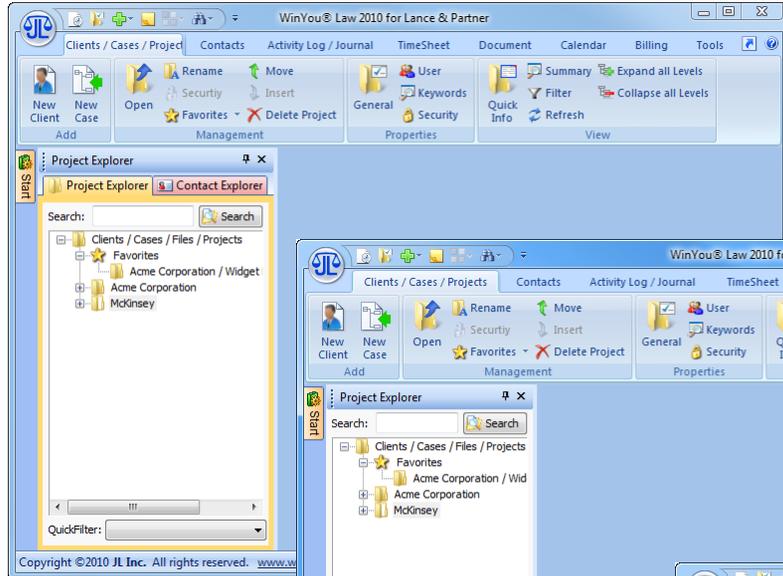
Minimize the window, e.g. as a tab on the side
[X] closes the window



TIP: Use "Activate Layout / Restore Settings" to return WinYou Law to the original state.

Different Views

You can also "undock" the window



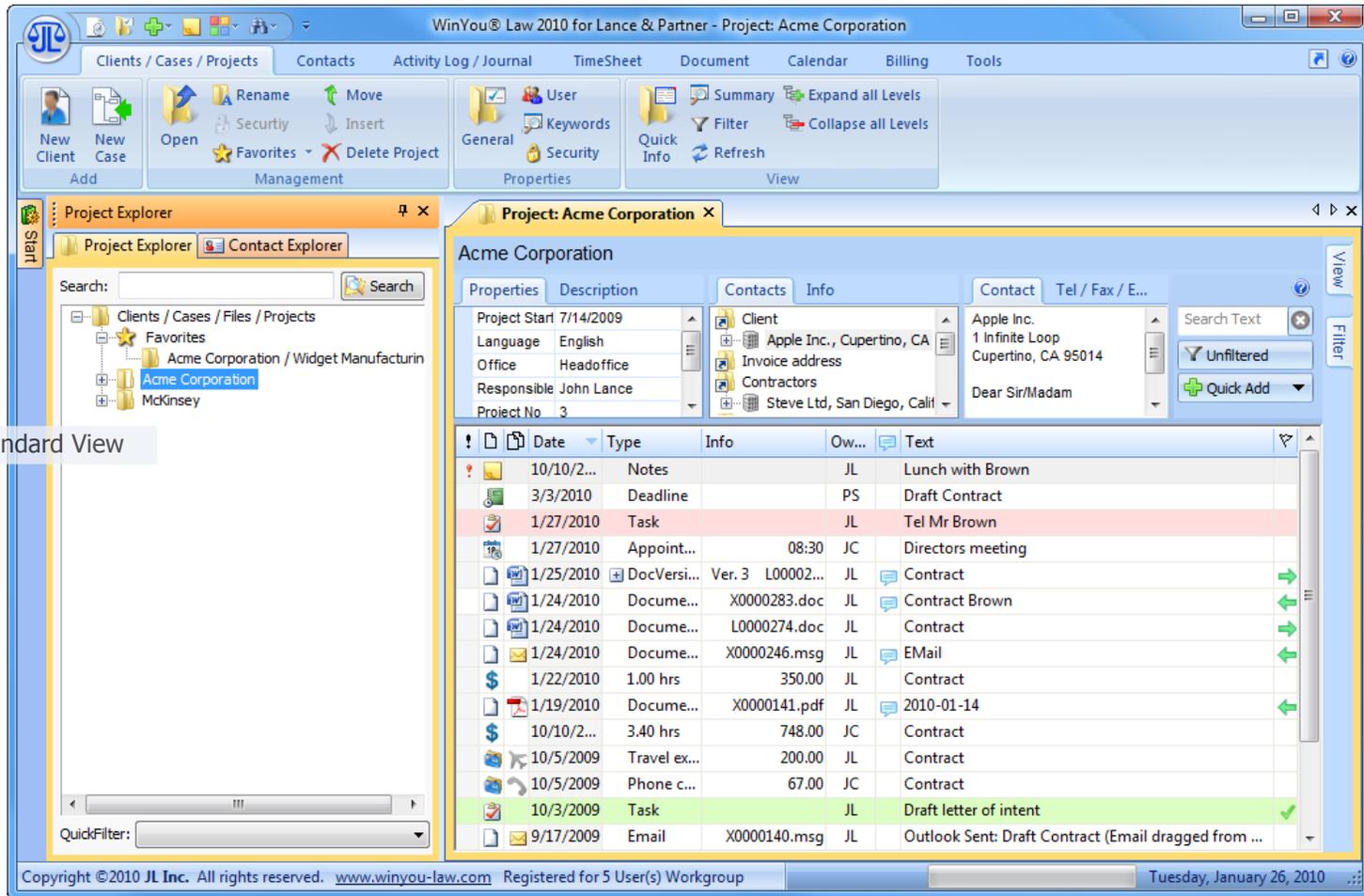
Activate Layout

Here you can activate the different layouts of WinYou Law or restore the default view.

 Activate Layout ▾

-  Start Layout
-  My Layout 1
-  My Layout 2
-  My Layout 3
-  Wiederherstellen
-  Farbschema ▸

WinYou Law Standard View



!	Date	Type	Info	Ow...	Text
!	10/10/2...	Notes		JL	Lunch with Brown
	3/3/2010	Deadline		PS	Draft Contract
	1/27/2010	Task		JL	Tel Mr Brown
	1/27/2010	Appoint...	08:30	JC	Directors meeting
	1/25/2010	DocVersi...	Ver. 3 L00002...	JL	Contract
	1/24/2010	Docume...	X0000283.doc	JL	Contract Brown
	1/24/2010	Docume...	L0000274.doc	JL	Contract
	1/24/2010	Docume...	X0000246.msg	JL	Email
	1/22/2010	1.00 hrs	350.00	JL	Contract
	1/19/2010	Docume...	X0000141.pdf	JL	2010-01-14
	10/10/2...	3.40 hrs	748.00	JC	Contract
	10/5/2009	Travel ex...	200.00	JL	Contract
	10/5/2009	Phone c...	67.00	JC	Contract
	10/3/2009	Task		JL	Draft letter of intent
	9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged from ...

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Color Styles

Activate Layout

- Blue
- Black
- Silver
- Aqua
- Scenic
- White
- System

- Start Layout
- My Layout 1
- My Layout 2
- My Layout 3
- Restore Settings
- Styles

The screenshot displays the WinYou Law 2010 software interface for a project named 'Acme Corporation'. The interface is divided into several overlapping windows:

- Main Project Overview Window:** Shows a table of activities for 'Acme Corporation' with columns for Date, Type, Info, Ow..., and Text.

Date	Type	Info	Ow...	Text
10/10/2009	Notes		JL	Lunch with Brown
3/4/2010	Deadline		JL	Draft Contract
1/29/2010	Task		JL	Tel Mr Brown
1/19/2010	DocVersi...	Ver. 2 L000014...	JL	Contract
1/19/2010	Document	X0000141.pdf	JL	2010-01-14
10/10/2009	3.40 hrs	680.00	JL	Contract
10/9/2009	Appointm...	09:00	JL	Directors meeting
10/5/2009	Travel ex...	200.00	JL	Contract
10/5/2009	Phone c...	67.00	JL	Contract
10/3/2009	Task		JL	Draft letter of intent
9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged from Ou...
9/3/2009	Notes		JL	Telephone Call with Mr. Rilman
8/31/2009	Bill	3525.00 R1000136...	JL	Bill #136 (Bill generated as a word document)
8/15/2009	Document	L0000139.doc	JL	Draft Contract (Document created in Word)
- Contact Explorer Window:** Displays a list of contacts, including 'Apple Inc., Cupertino, CA' and 'Dear Sir/Madam'.
- Document Explorer Window:** Shows a list of documents with columns for Date, Type, Info, Owner, and Text.

Date	Type	Info	Owner	Text
10/10/2009	Notes		JL	Lunch with Brown
3/4/2010	Deadline		JL	Draft Contract
1/29/2010	Task		JL	Tel Mr Brown
1/19/2010	DocVersions	Ver. 2 L0000144.d...	JL	Contract
1/19/2010	Document	X0000141.pdf	JL	2010-01-14
10/10/2009	3.40 hrs	680.00	JL	Contract
10/9/2009	Appointme...	09:00	JL	Directors meeting
10/5/2009	Travel expe...	200.00	JL	Contract
10/5/2009	Phone calls	67.00	JL	Contract
10/3/2009	Task		JL	Draft letter of intent
9/17/2009	Email	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged from Outlook)
9/3/2009	Notes		JL	Telephone Call with Mr. Rilman
8/31/2009	Bill	3525.00 R1000136...	JL	Bill #136 (Bill generated as a word document)
8/15/2009	Document	L0000139.doc	JL	Draft Contract (Document created in Word)

Support

Help
FAQ
Support
E-Mail Support
Support

Help

Help

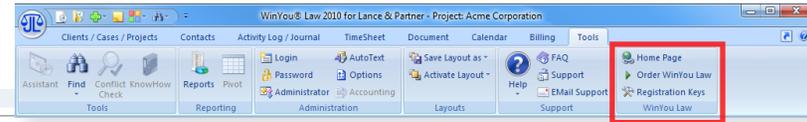
- First Steps Guide
- WinYou Law Manual
- Online Video Tutorials
- FAQ
- Support
- Email Support
- Show Quick Start
- Tip of the Day
- About WinYou Law

The screenshot shows the WinYou Law 2010 software interface. The title bar reads "WinYou Law 2010 for Lance & Partner - Project: Acme Corporation". The menu bar includes "Clients / Cases / Projects", "Contacts", "Activity Log / Journal", "TimeSheet", "Document", "Calendar", "Billing", and "Tools". The "Tools" menu is open, showing options: "Assistant", "Find", "Confid. KnowHow Check", "Reports", "Pivot", "Login", "Password", "Administrator", "AutoText", "Options", "Accounting", "Administration", "Save Layout as...", "Activate Layout", "Layouts", "Help", "FAQ", "Support", "E-Mail Support", "Support", "Home Page", "Order WinYou Law", "Registration Keys", and "WinYou Law". The "Help" option in the Tools menu is highlighted with a red box.

FAQ  FAQ	
Support  Support	
Email Support  EMail Support	Send an Email to WinYou Law Support

- Home Page
- Order WinYou Law
- Registration Keys
- WinYou Law

WinYou Law



Home Page

Home page of WinYou Law



Order WinYou Law



Registration Keys

Here you can enter your registration keys



WinYou Law

Final steps of licensing WinYou Law:

- 1.** Mark and copy (CTRL + C) the registration information in the email we sent to you.

Use the copy / paste function on your keyboard (CTRL + C) or rightclick on the highlighted text and select Copy in menu.
- 2.** **Paste Registration Keys**

Click button to automatically fill in the fields

Check that the fields below have been filled out:

Registration Keys:

Company Name: **Lance & Partner**

Serial Number:

Master Keys: 0:

1:

2:
- 3.** **Save Registration Keys**

Click button to save the information.
- 4.** Close this dialog and restart WinYou Law to activate your licensed version.

Add On's

DropZone

DropZone is a window where you can almost drop anything to be inserted (and copied) in WinYou Law.

Just select an object (e.g. email...) with the mouse and drag it to the DropZone window and release here.

Drag from Outlook

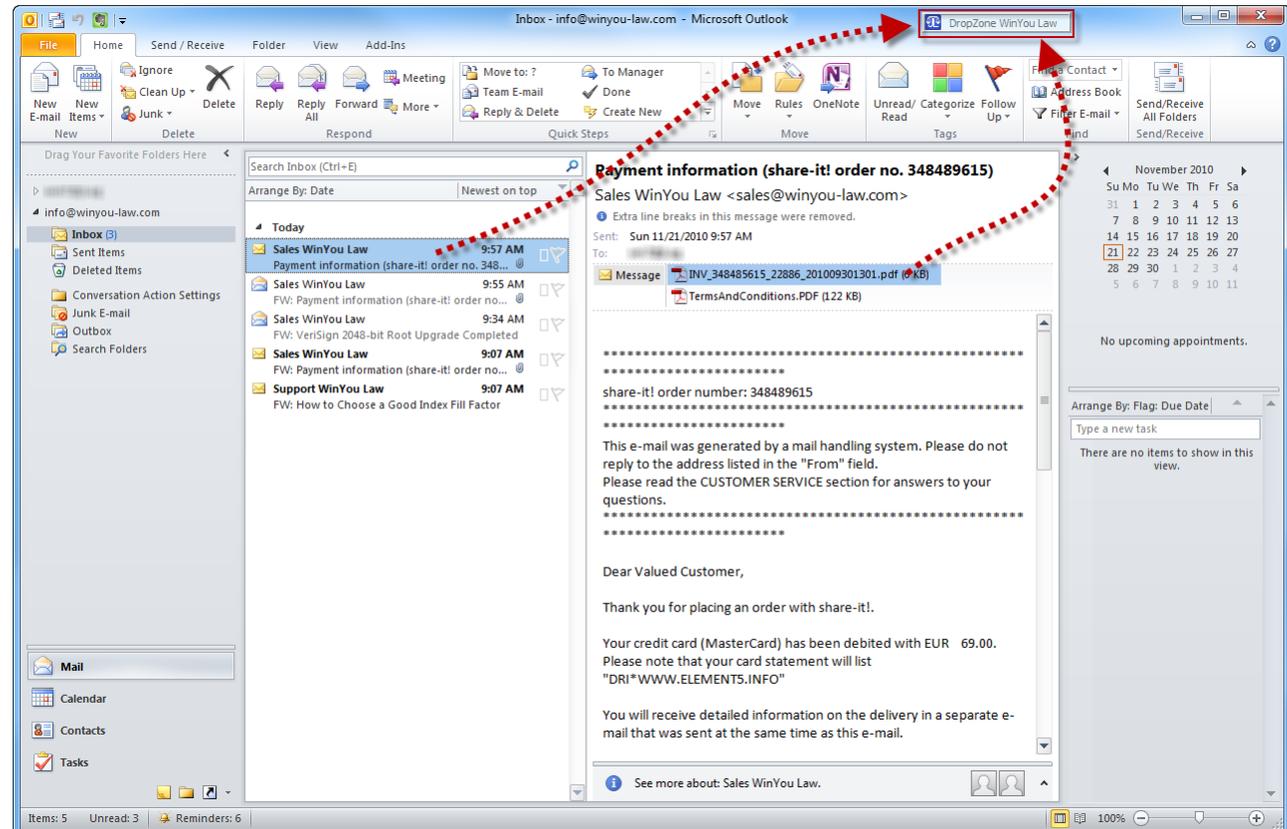
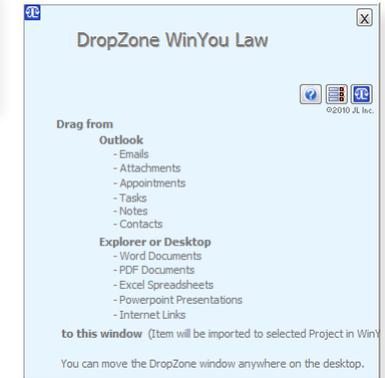
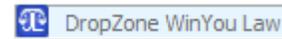
- E-Mails (including attachments)
- Attachments (Documents, excel, pdf etc)
- Past Appointments (will be inserted as fee in WinYou Law)
- Future Appointments (will be inserted as appointments in WinYou Law)
- Tasks
- Notes
- Contacts

Outlook e-mails are **copied** into the document folder as .MSG files (message file) into the WinYou Law document folder (AutoDoc). E-Mails can be opened with a double click and are opened within Outlook.

TIP: E-Mails and Attachments can also be dragged directly to the work screen in WinYou Law.

Drag from Windows (desktop, explorer)

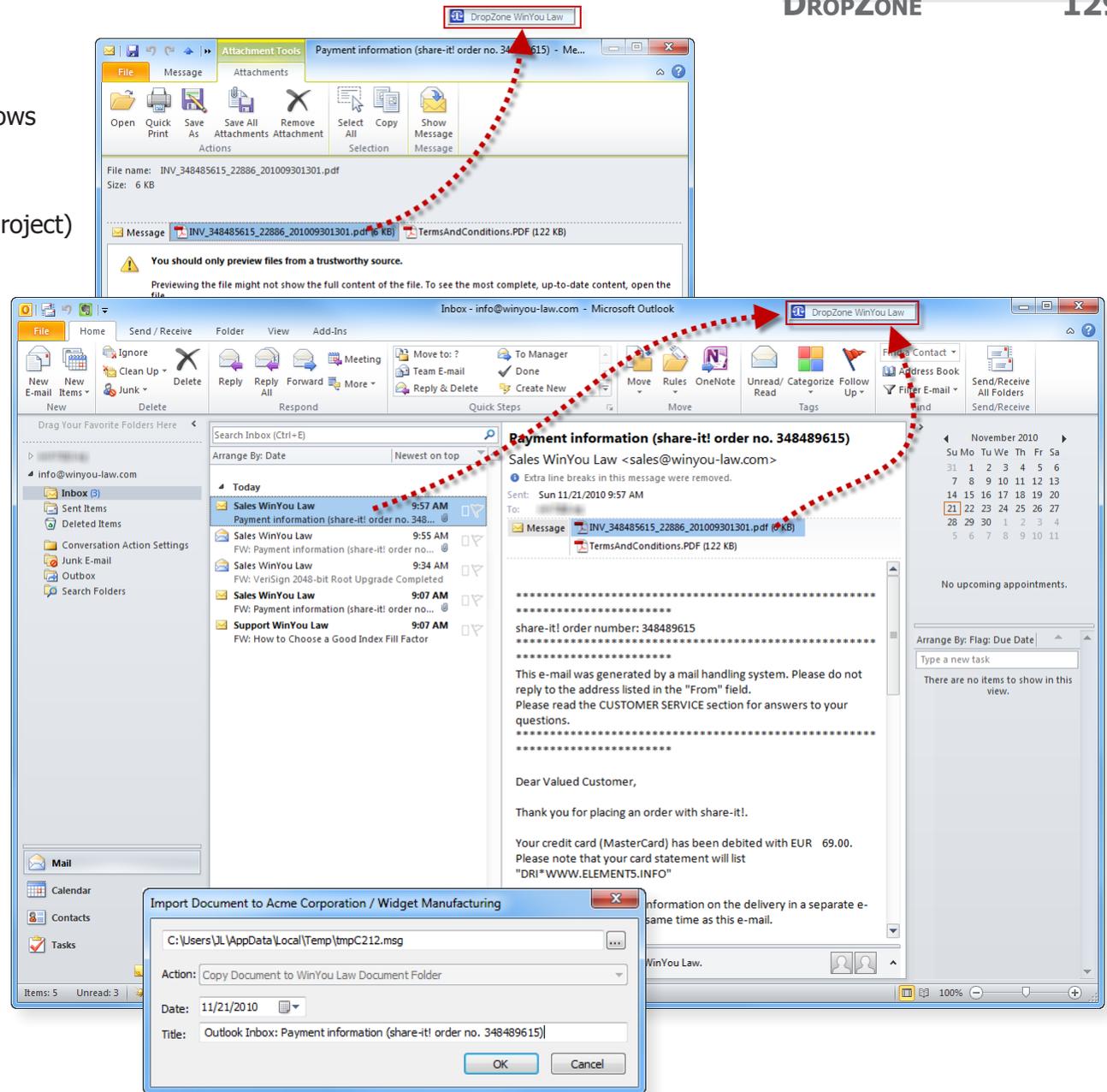
- Word Documents
- PDF Documents
- Excel Spreadsheets
- Powerpoint Presentations
- Internet Links



Drag Outlook E-Mails and Attachments

1. Open the corresponding project in WinYou Law.
2. Drag E-Mail or attachment to the DropZone Windows
3. Click OK on the import Document dialog

Document is inserted in the work screen (in selected project)



Date	Type	Info	O...	Text
11/21/2010	Document	X0000171.pdf	JL	E-Mail Attachment: Payment information (sh...
11/21/2010	Document	X0000169.msg	JL	Outlook Inbox: Payment information (share-i...

Drag Outlook Appointments

1. Open the corresponding project in WinYou Law.
2. Drag the appointment to the DropZone Windows
3. Click OK on the import dialog

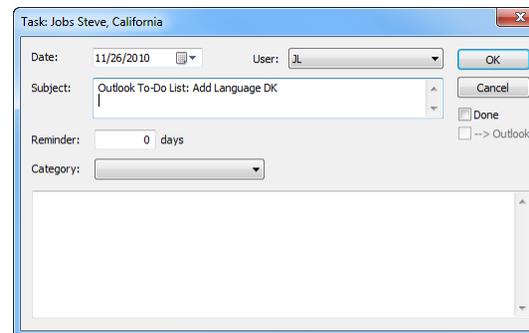
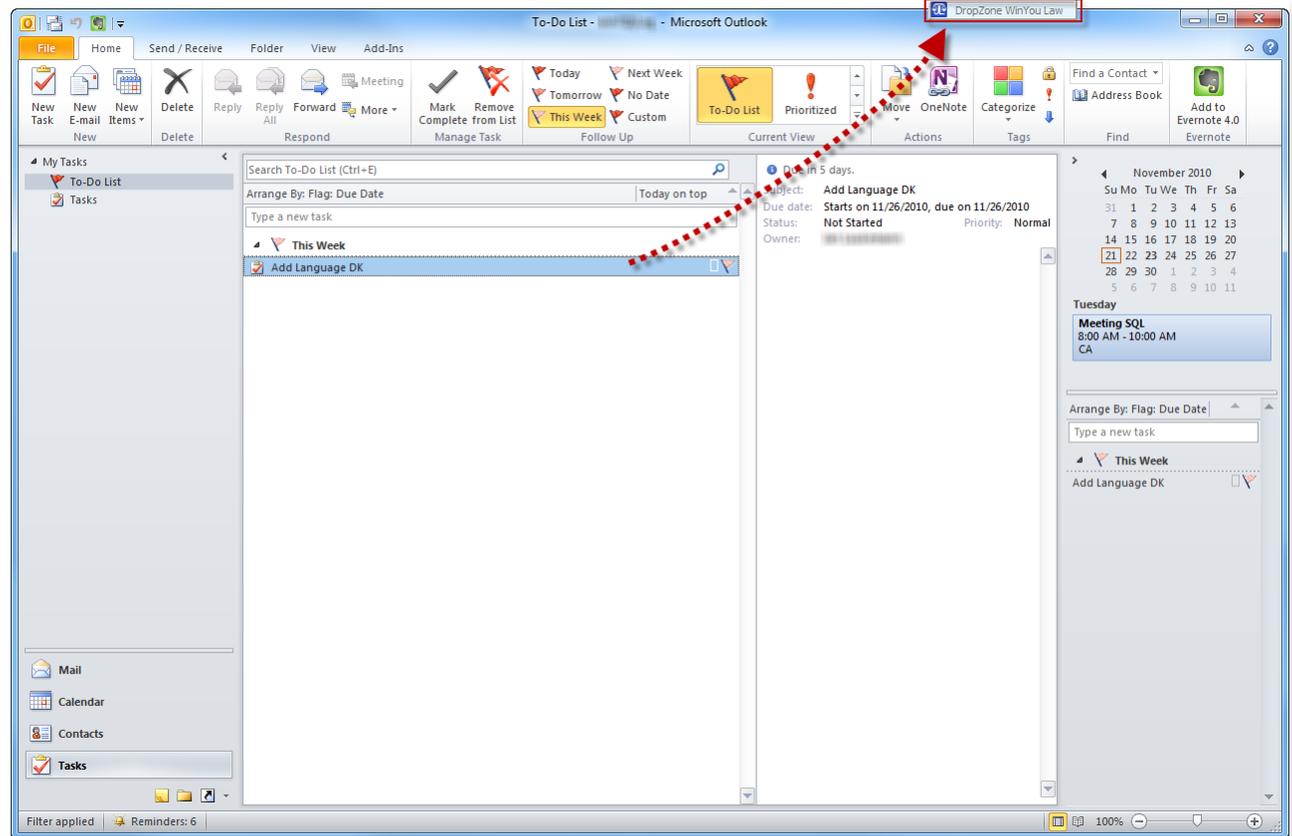
TIP: If the appointment is in the past, WinYou Law will automatically insert a Fee else an appointment is inserted.

Date	Type	Info	Ow...	Text
11/23/2010	Appoin...	08:00 - 11:00	JL	Outlook Calendar: Meeting SQL
11/4/2010	1.00 hrs	350.00	JL	Phone Google

Drag Outlook Tasks

1. Open the corresponding project in WinYou Law.
2. Drag the task to the DropZone Windows
3. Click OK on the import dialog

Task is inserted in the work screen (in selected project)

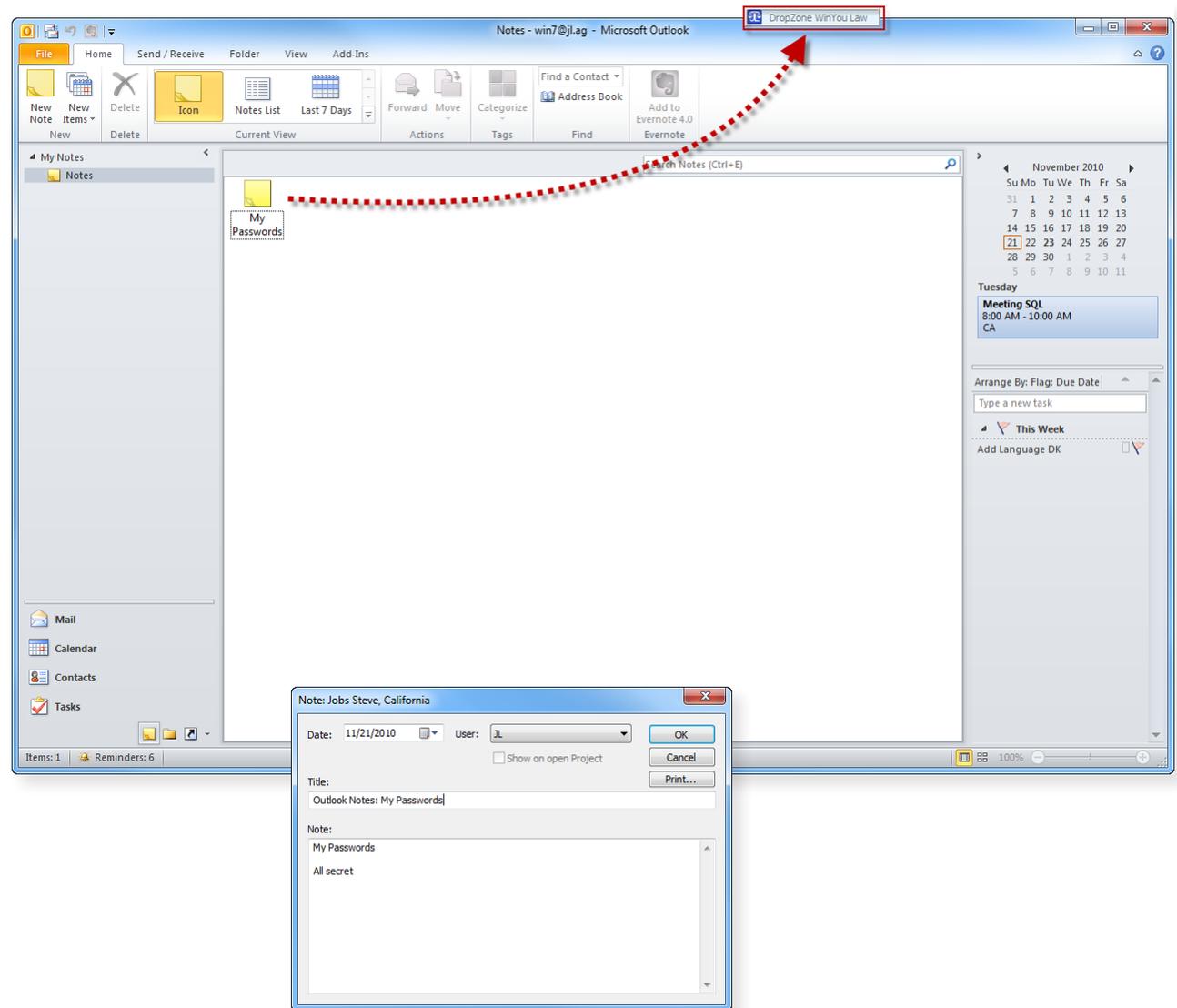


Date	Type	Info	Ow...	Text
11/26/2010	Task	JL	Outlook To-Do List: Add Language DK	

Drag Outlook Notes

1. Open the corresponding project in WinYou Law.
2. Drag the note to the DropZone Windows
3. Click OK on the import dialog

Note is inserted in the work screen (in selected project)

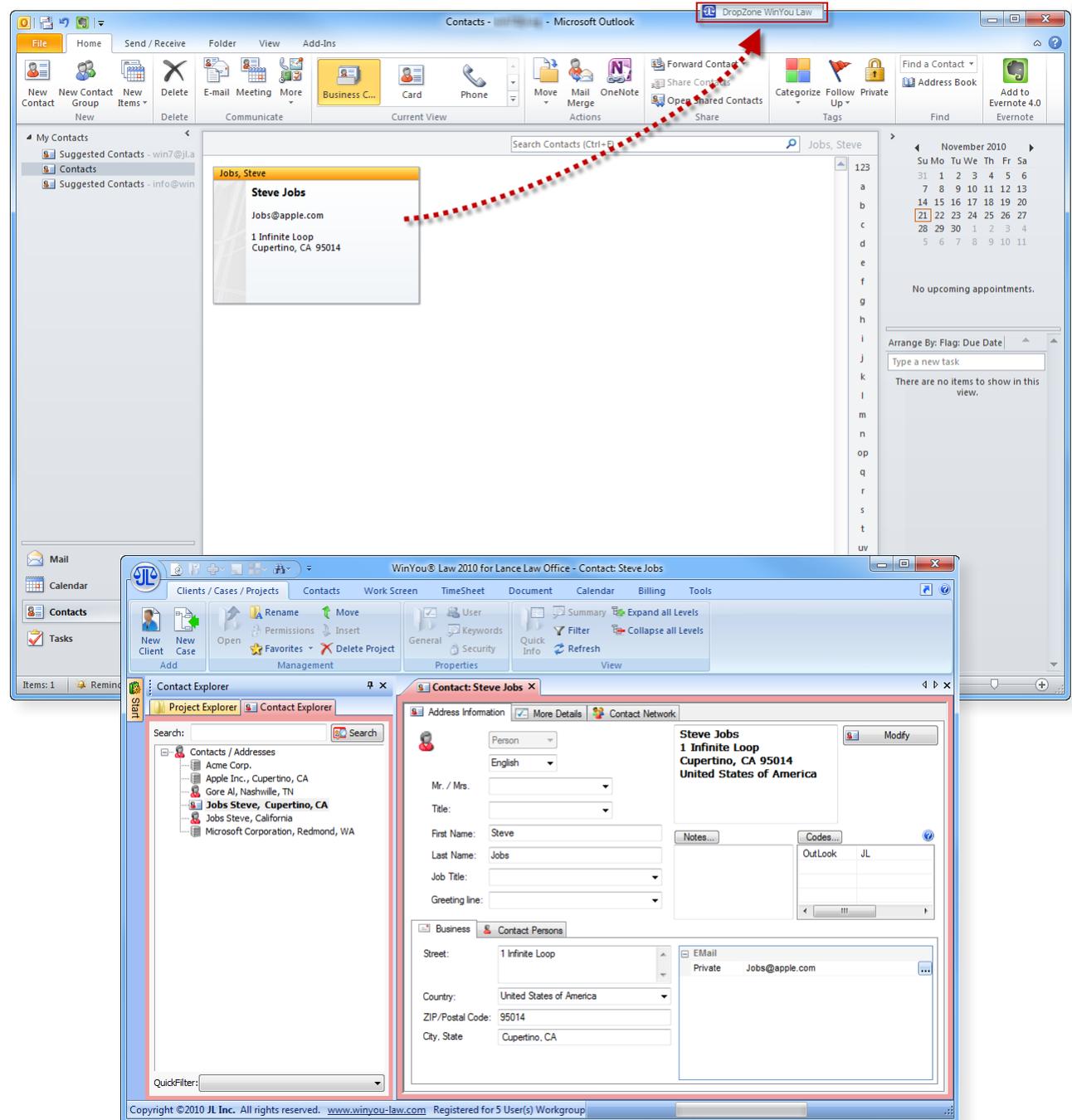


Date	Type	Info	Ow...	Text
11/21/2010	Notes	JL	Outlook Notes: My Passwords	

Drag Outlook Contacts

1. Drag the Contact to the DropZone Windows

TIP: Imported Contact is shown in bold in the WinYou Law Contact Explorer until next refresh.

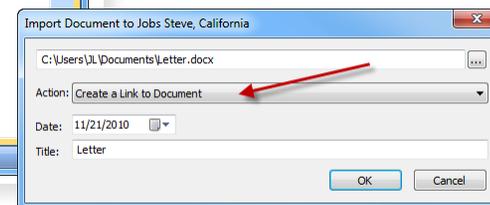
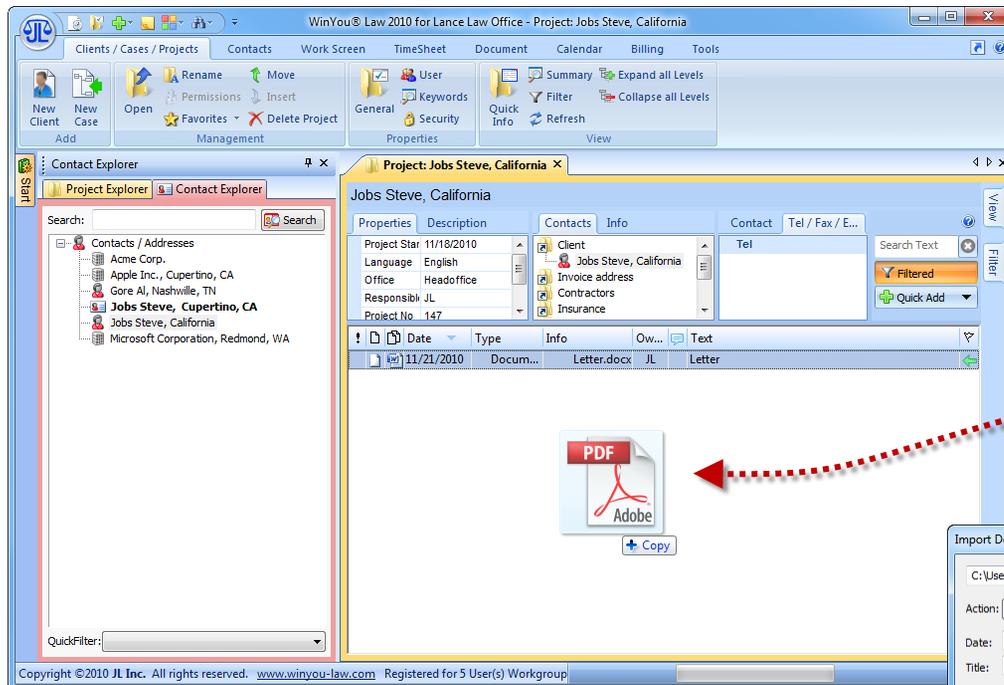
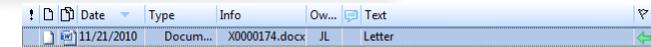
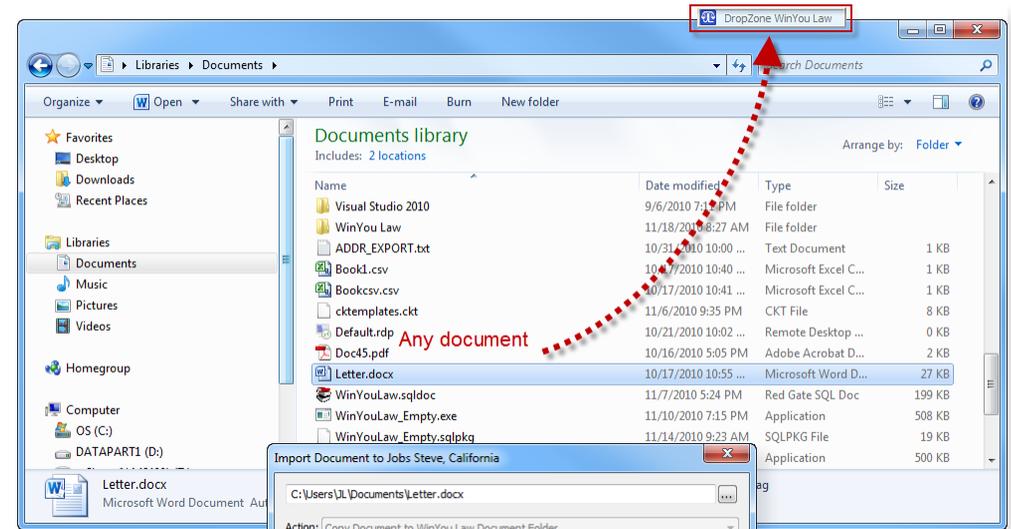


Drag Documents, Files, Links...

1. Open the corresponding project in WinYou Law.
2. Drag the document to the DropZone Windows
3. Click OK on the import dialog

Document / file is inserted in the work screen (in selected project)

TIP: You can also drag a document or file direct to the work screen. In the Import Dialog you have now the possibility to select the option "Create a Link to Document": The document is not copied to the WinYou Law folder, only the link to the physical document is inserted in the work screen.



Import and Export

You will find the Wizard in the menubar Contacts.

Import

You can import data from Microsoft Outlook or directly from a file or database. Following formats are available:

- Outlook Contacts (you have the possibility to select the Outlook Contacts folder) page 136
- File formats like csv, txt, doc (Word), xls (Excel), odt (Open Office), html, xml... page 137
- Database formats like mdb (MS Access), Paradox, DBase, Advantage, DBIsam, windows address book, Skype log or any other database via ADO Connection

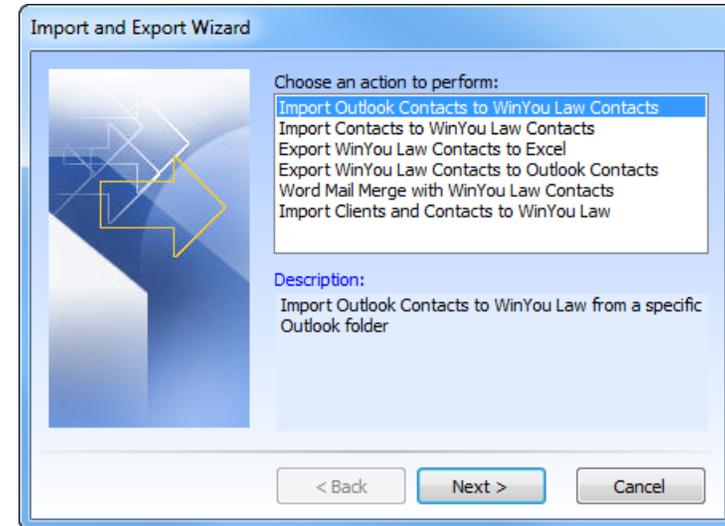
You can control the result in WinYou Law directly and have the possibility to undo the import (keep the import dialog open). You can import clients and contacts at the same time or generate clients automatically from your contacts (page 140).

Export

Following possibilities are available:

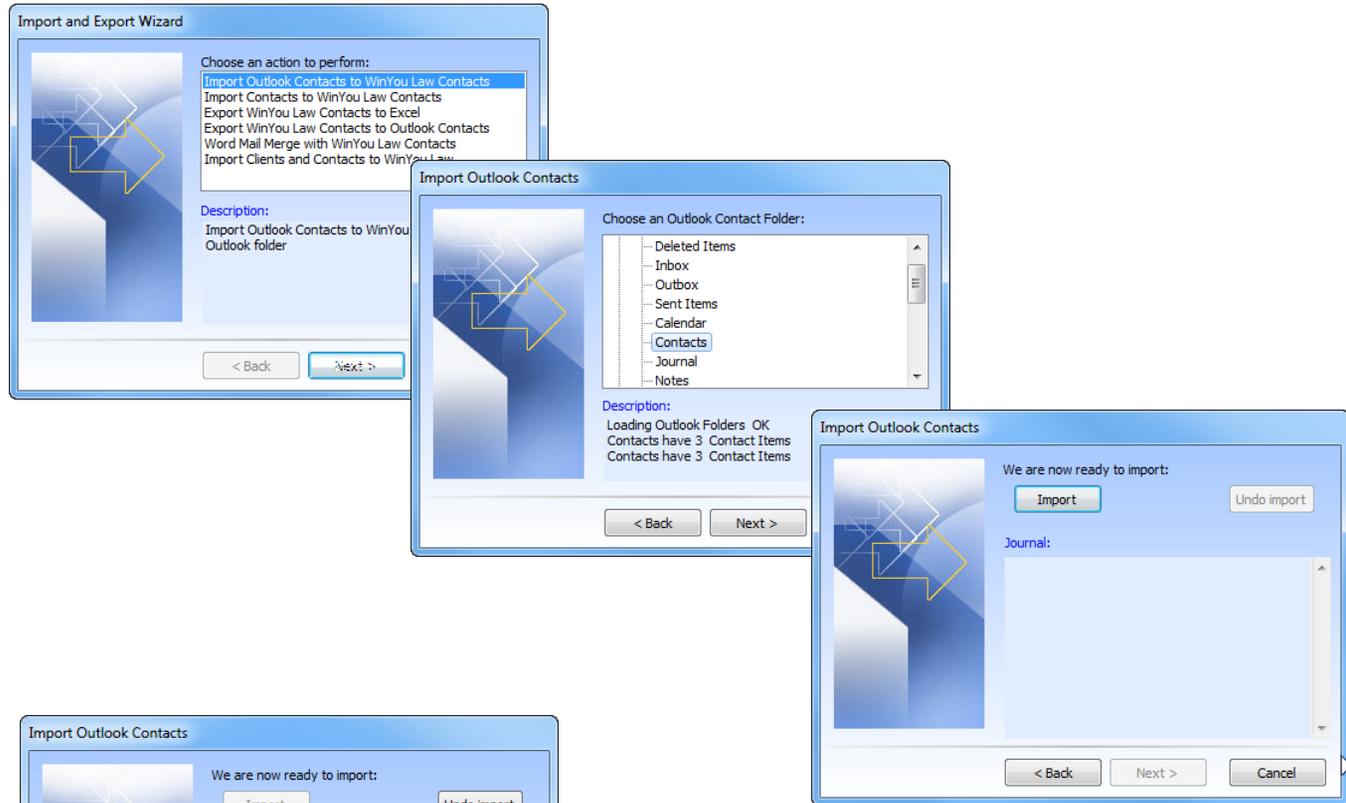
- From WinYou Law Contacts to Outlook Contacts (you can select the Outlook folder)
- From WinYou Law Contacts to Excel page 144
- From WinYou Law Contacts to Word Mail Merge (all automatic, you can directly create the text and insert WinYou Law fields like name or address)

WinYou Law contains much more fields as Outlook, therefore not all fields in WinYou Law will be found in an Outlook Contact.

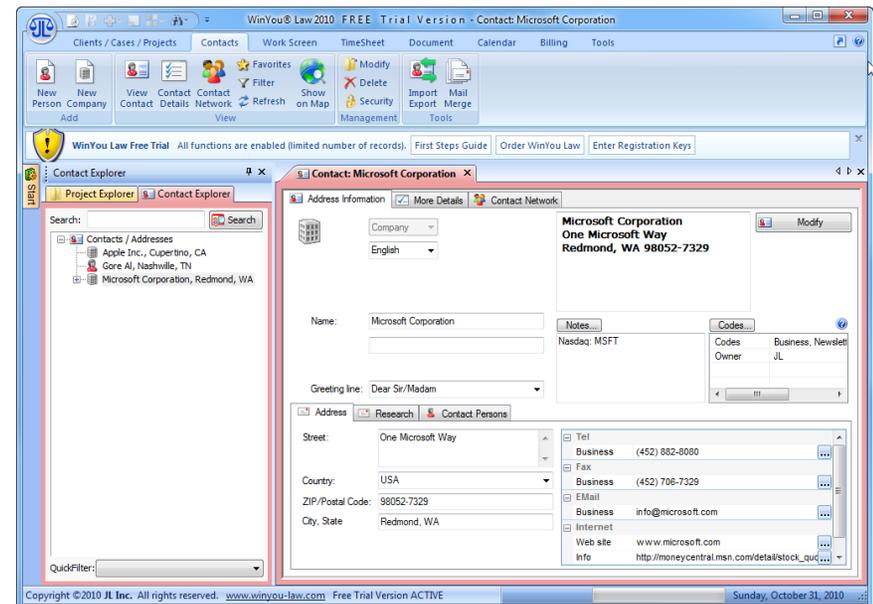


Import Outlook Contacts

1. Select "Import Outlook Contacts to WinYou Law Contacts" and click on "Next"
2. Select the Outlook Contacts folder
3. Click on the "Import" button



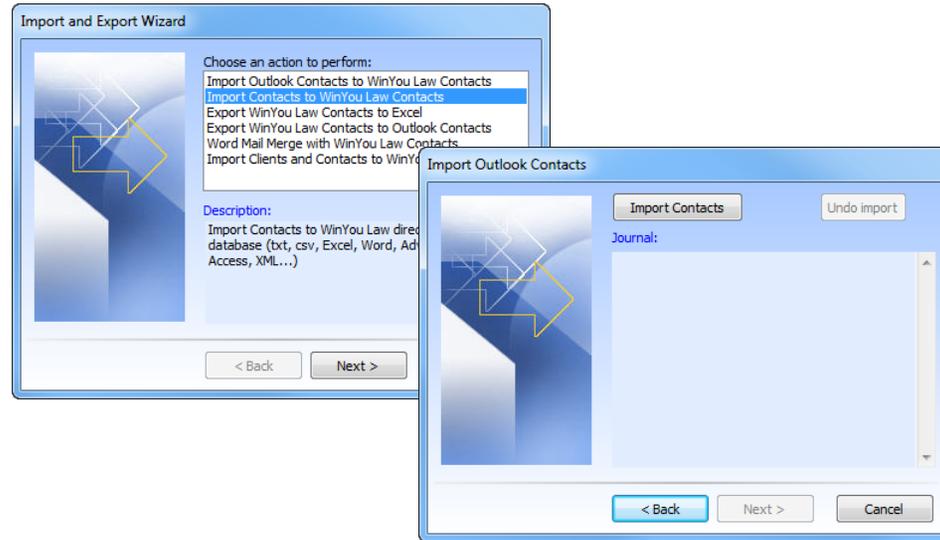
Before you close this dialog, switch to WinYou Law and check the imported contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import.



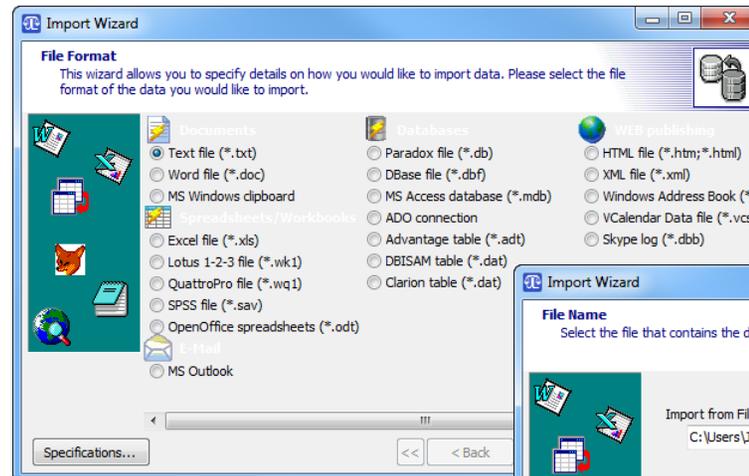
Import Contacts from a file or database

1. Select "Import Contacts to WinYou Law Contacts" and click on "Next"

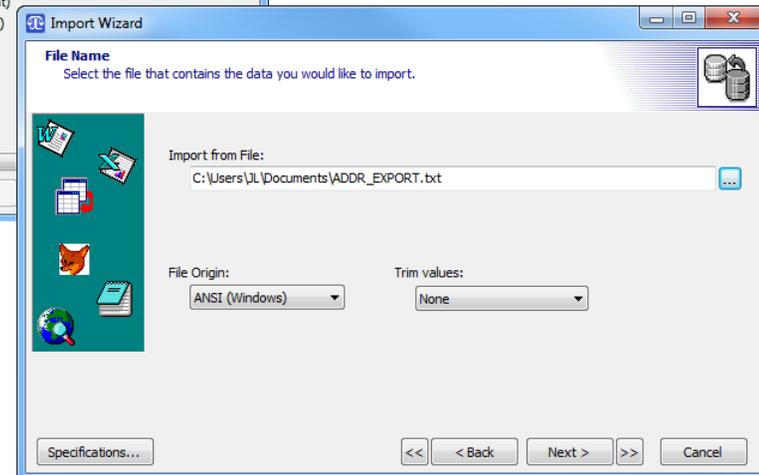
2. Click on "Import Contacts" button



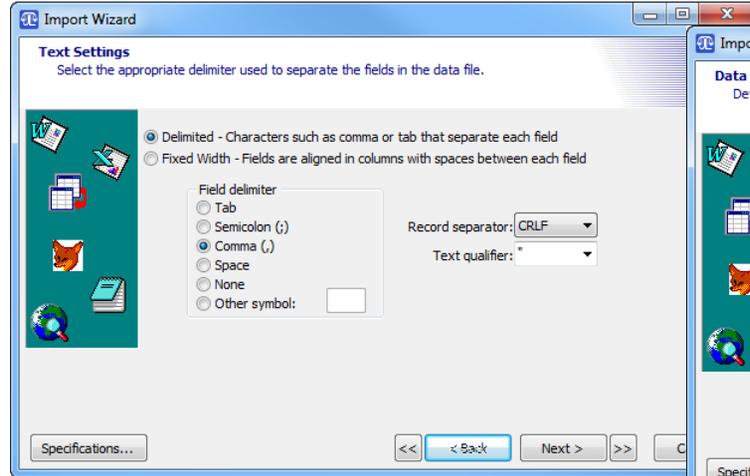
3. Select import format



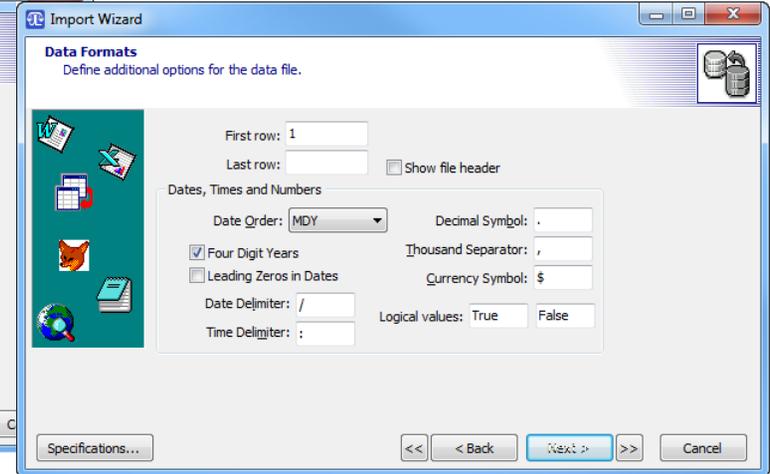
4. Select file / folder (or database)



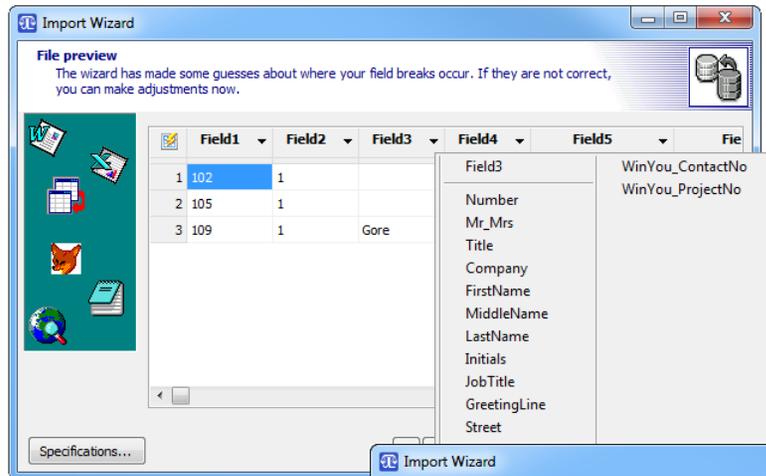
5. Select delimiter (txt file)



6. Select data formats

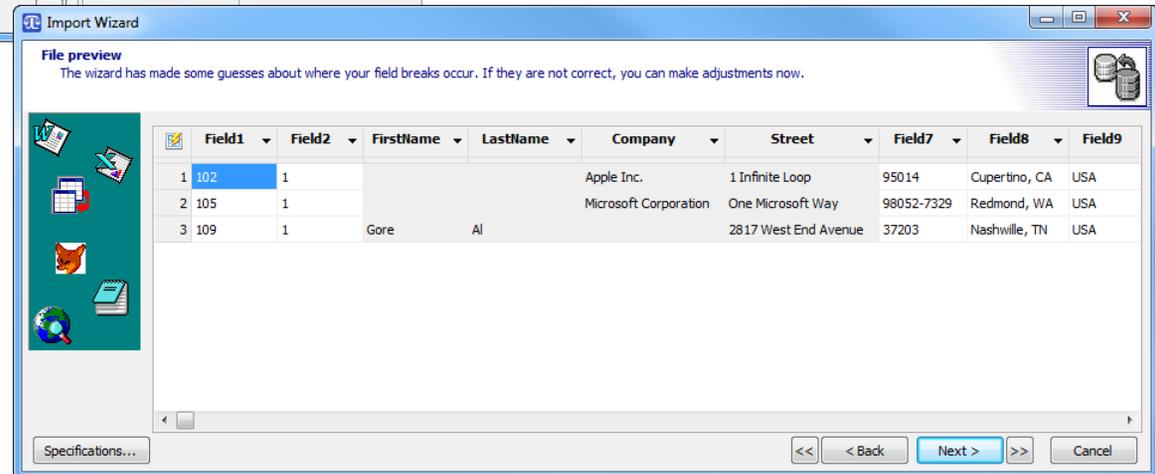


7. In the file preview click on a header and select a corresponding field for the WinYou Law database

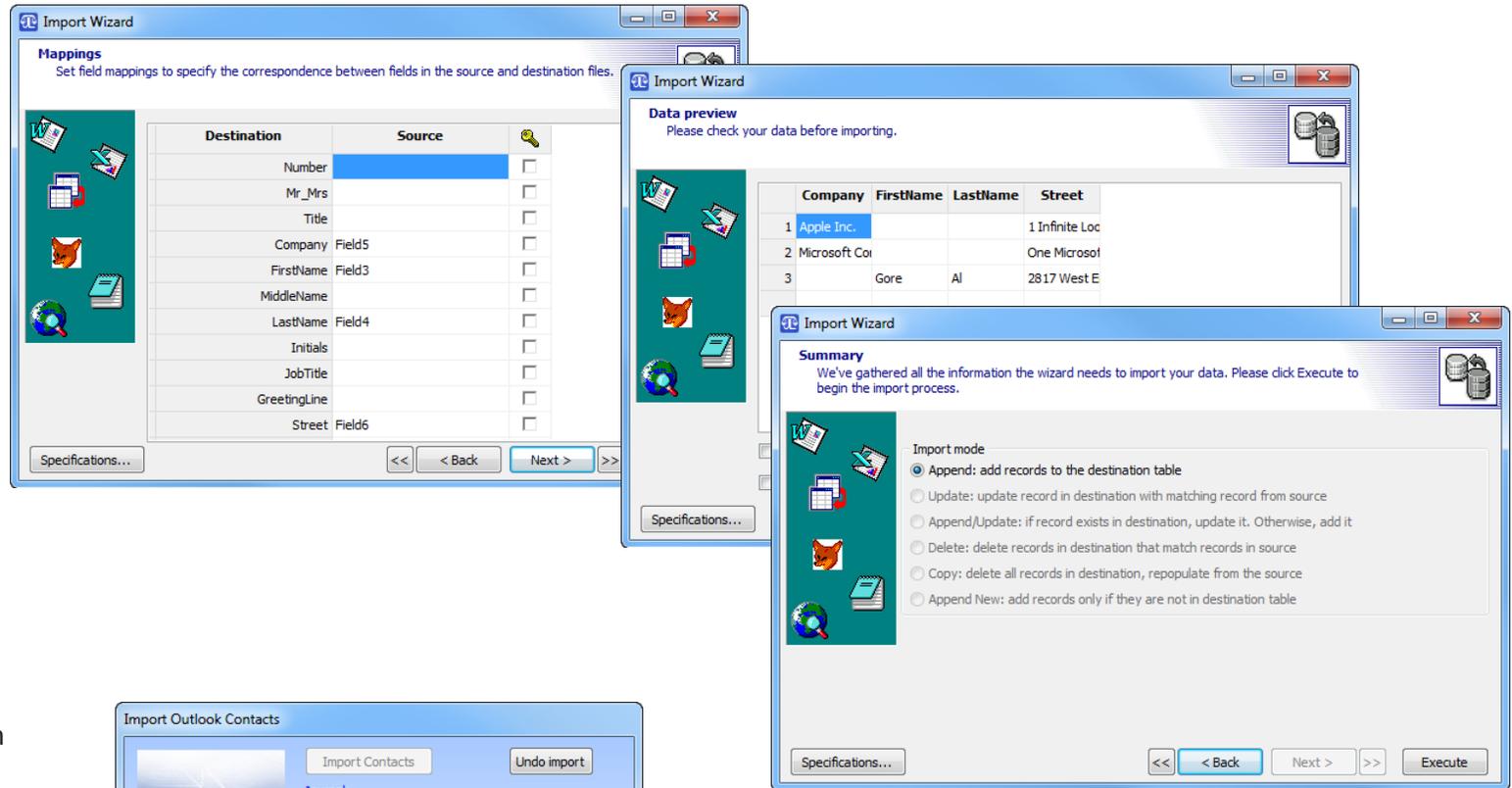


Do this for all fields that you want to import

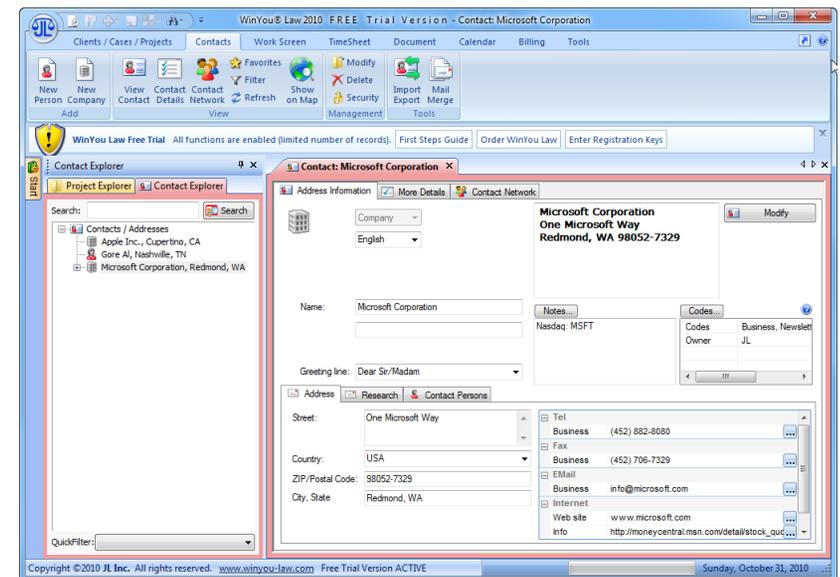
When finished click on "Next"



On the next screens you can check the results. Use "back" to correct anything before the final import to WinYou Law (with the "Execute" button

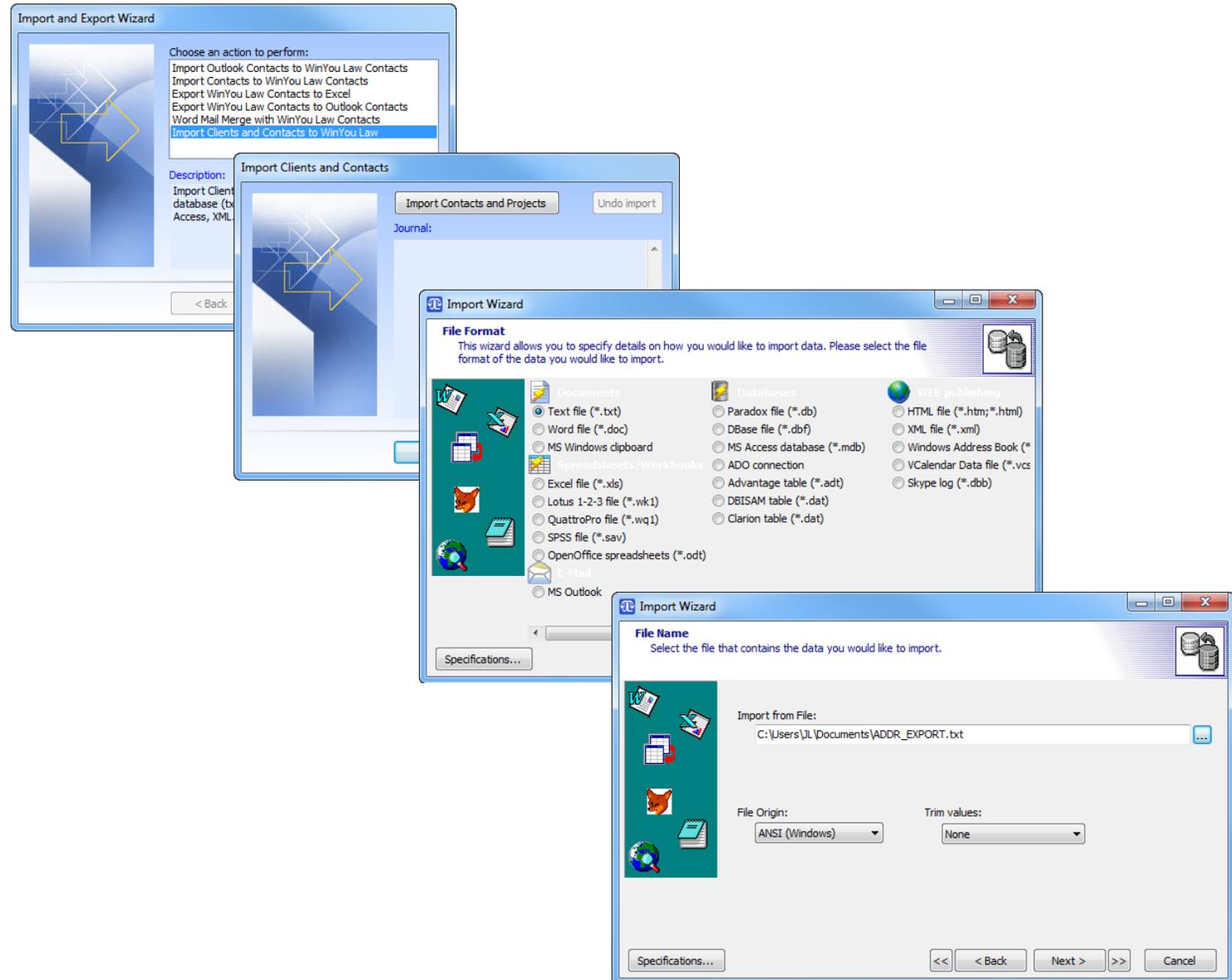


Before you close this dialog, switch to WinYou Law and check the imported contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import.



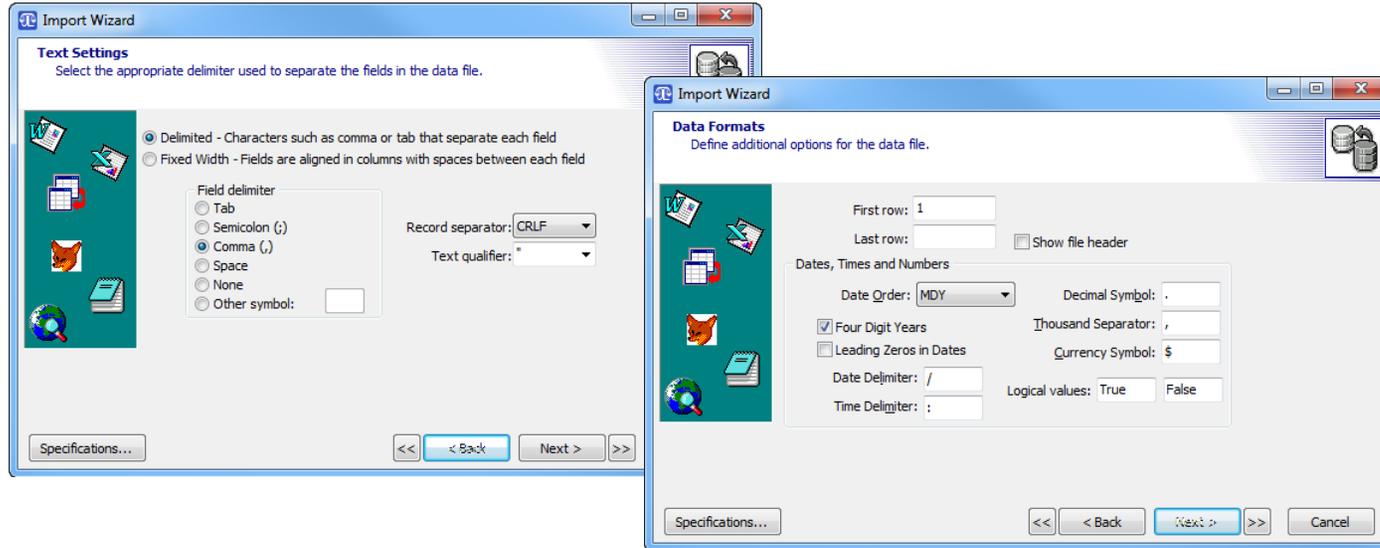
Import Clients and Contacts from a file or database

1. Select "Import Clients and Contacts to WinYou Law" and click on "Next"
2. Click on "Import Contacts and Projects" button
3. Select import format
4. Select file / folder (or database)



5. Select delimiter (txt file)

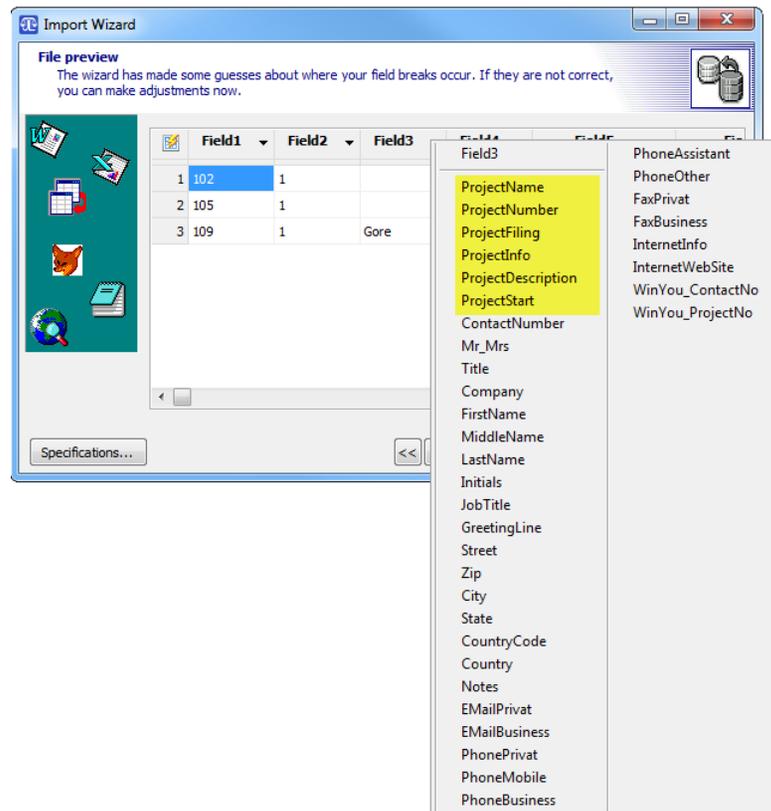
6. Select data formats



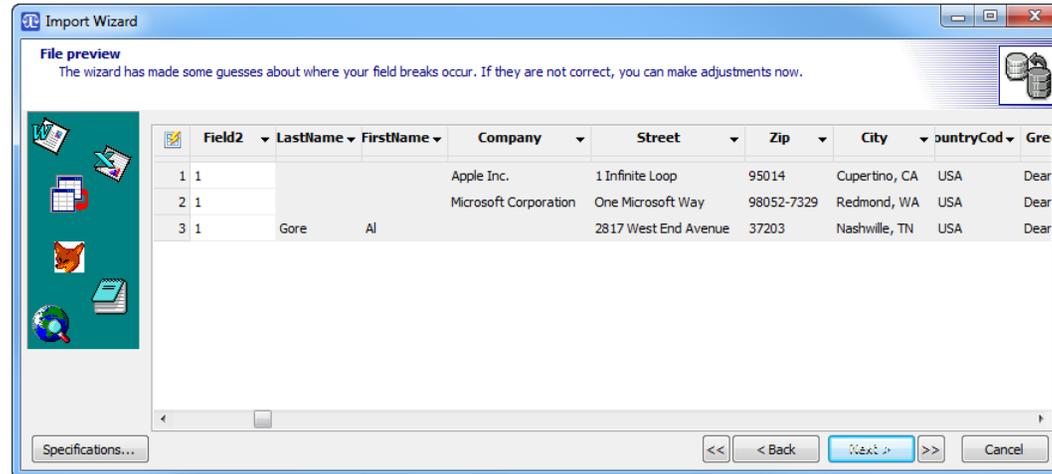
In the file preview click on a header and select a corresponding field for the WinYou Law database

Do this for all fields that you want to import

When finished click on "Next"

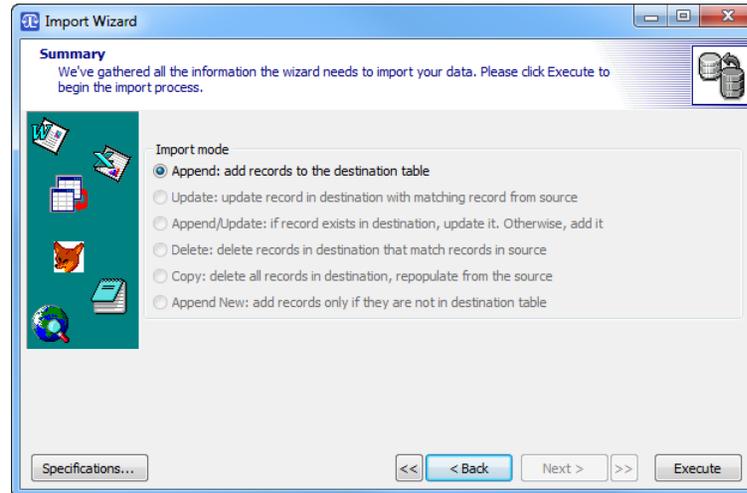


8. In the next screens you can check the results. Use "back" to correct anything before the final import to WinYou Law (with the "Execute" button)

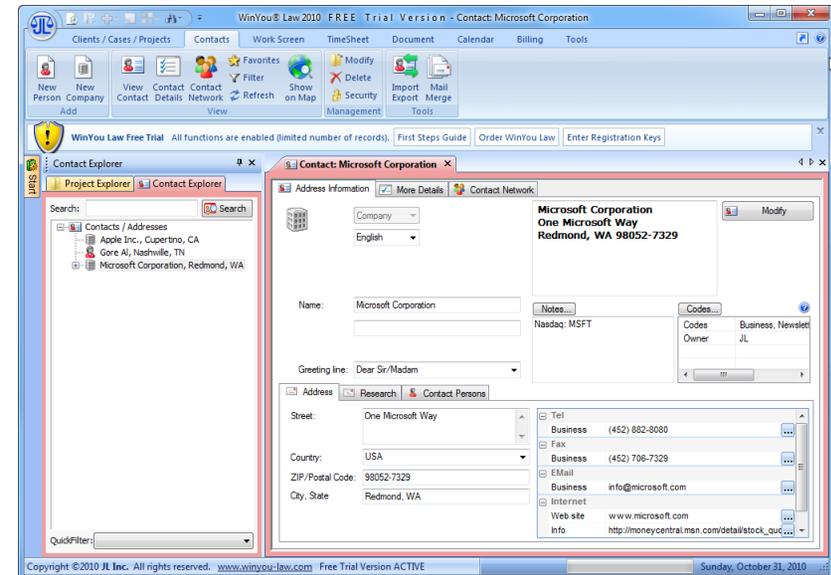


If you do not have a Client Name, keep the ProjectName field empty.

TIP: If you leave the ProjectName (Client Name) field empty, the import wizard will fill the ProjectName automatically.

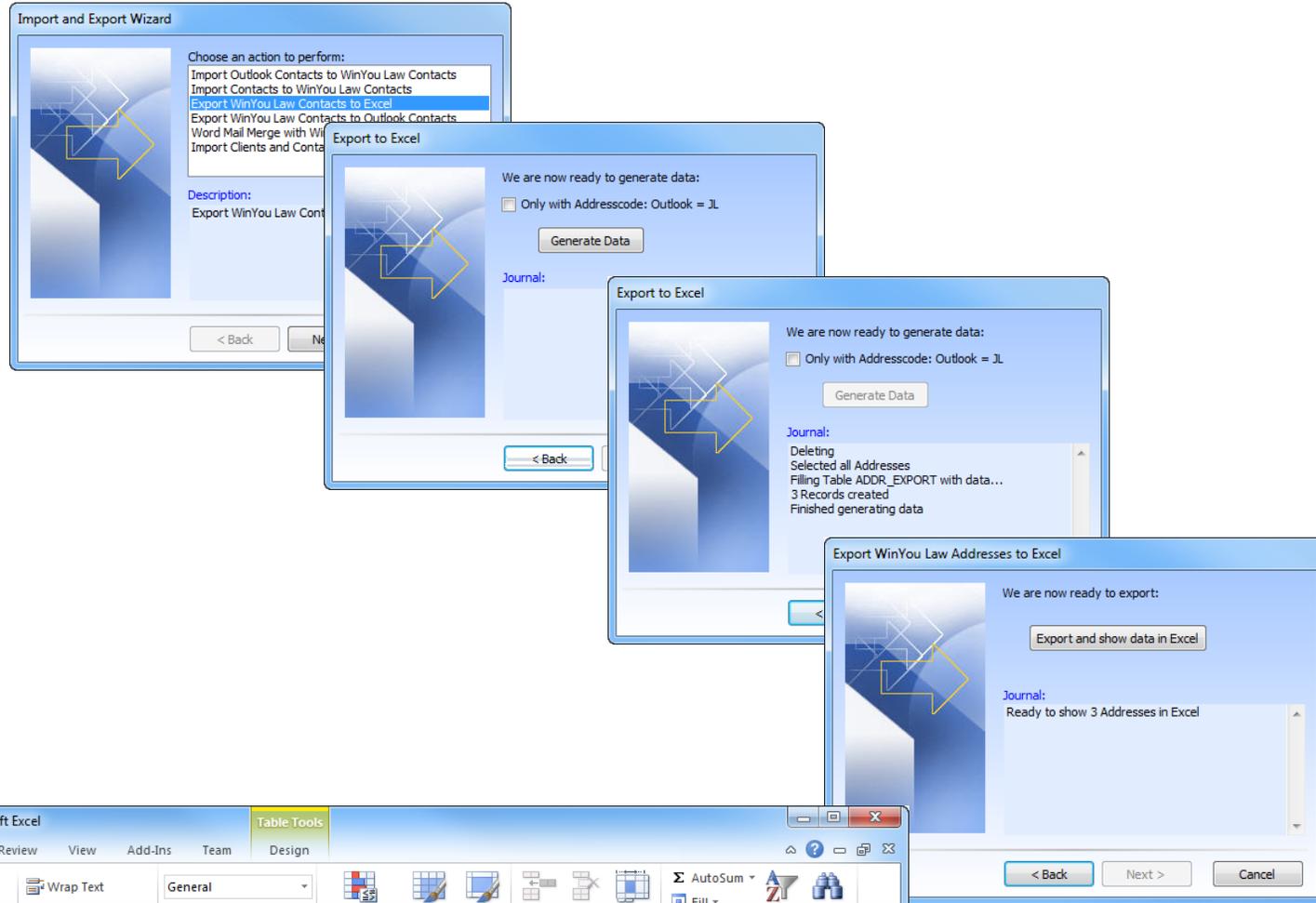


- Before you close this dialog, switch to WinYou Law and check the imported clients and contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import



Export WinYou Law Contacts to Excel

1. Select "Export WinYou Law Contacts to Excel" and click on "Next"
2. Follow the instructions on screen

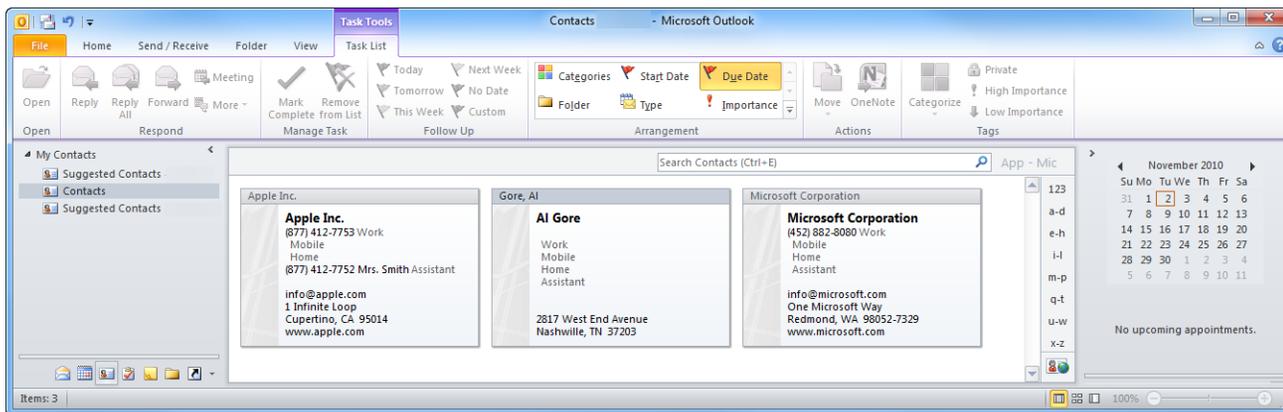
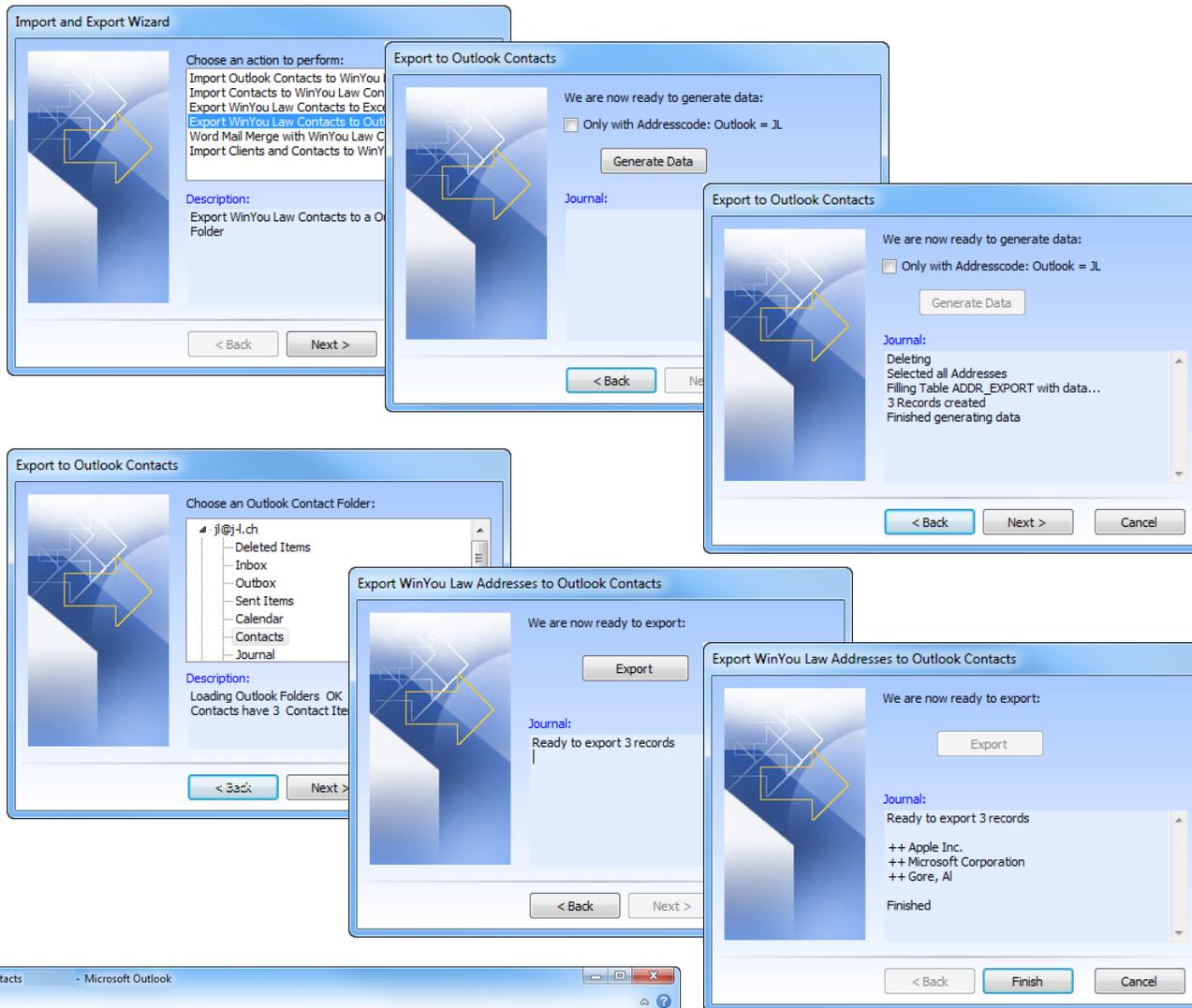


Book1 - Microsoft Excel

Adr#	User#	LastName	FirstName	Company	Street	PostalCode	City	Country	Salutation	HomePhone	BusinessPhone	MobilePhone	Ass
102	1			Apple Inc.	1 Infinite Loop	95014	Cupertino, CA	USA	Dear Sir/Madam		(877) 412-7753		(87
105	1			Microsoft Corporation	One Microsoft Way	98052-7329	Redmond, WA	USA	Dear Sir/Madam		(452) 882-8080		
109	1	Gore	Al		2817 West End Avenue	37203	Nashville, TN	USA	Dear Albert Gore				

Export WinYou Law Contacts to Outlook

Just follow the instructions in the dialogs



Word Mail Merge with WinYou Law Contacts

Follow the instructions in the dialogs.

The table with contact data is automatic linked, just start to insert Merge fields.

Also the Address Block is automatically filled!

