Tip 1: Add a new Client

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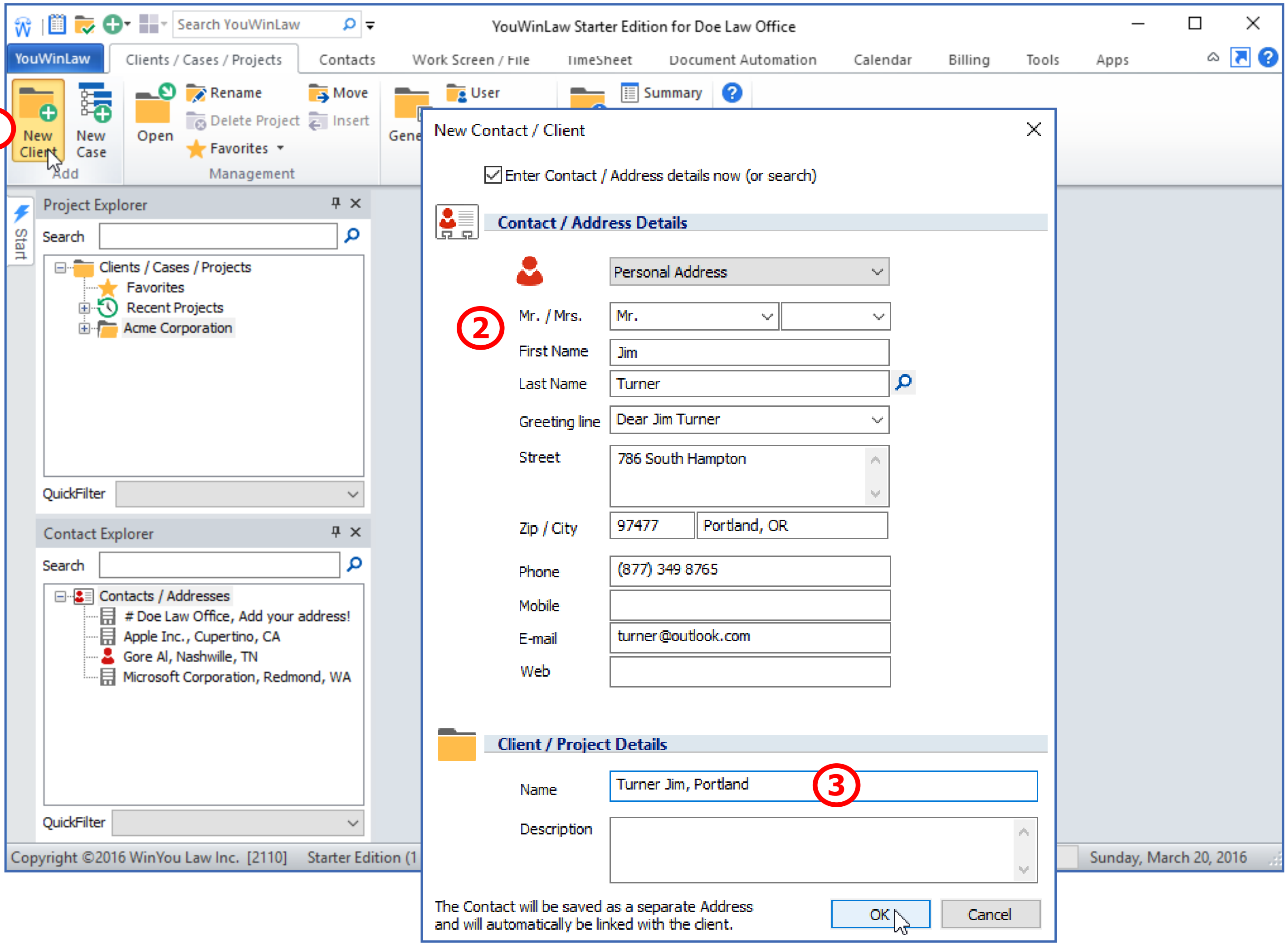

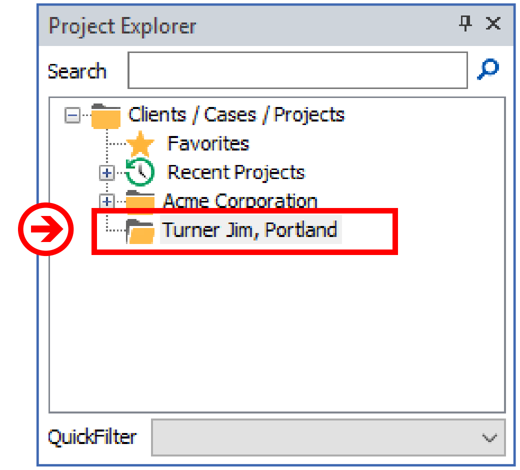

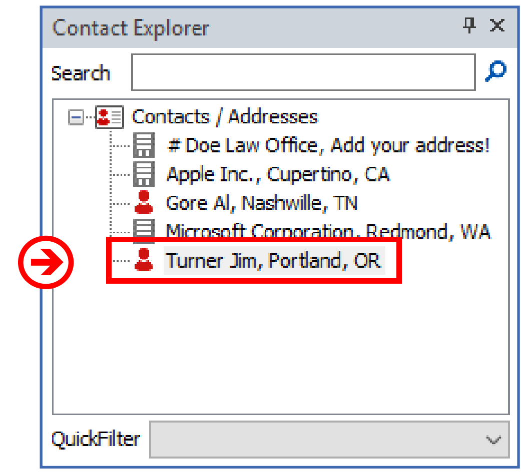

1 Click on «New Client»

2 Enter the Contact information for your Client

3 You can change the suggested Client Name

➔ Result: a new Client and a new Contact (and linked)

With these few steps, you have not only created a new client, but also the corresponding address is defined (and linked).

These processes are automatically running in the background:

- Check duplicate address
- Proposal for greeting line
- Proposal for client name
- Creation of contact / address in address database
- Creation of client in client / project database
- Linking of client and contact

More Information

Tip 2: Enter a Fee

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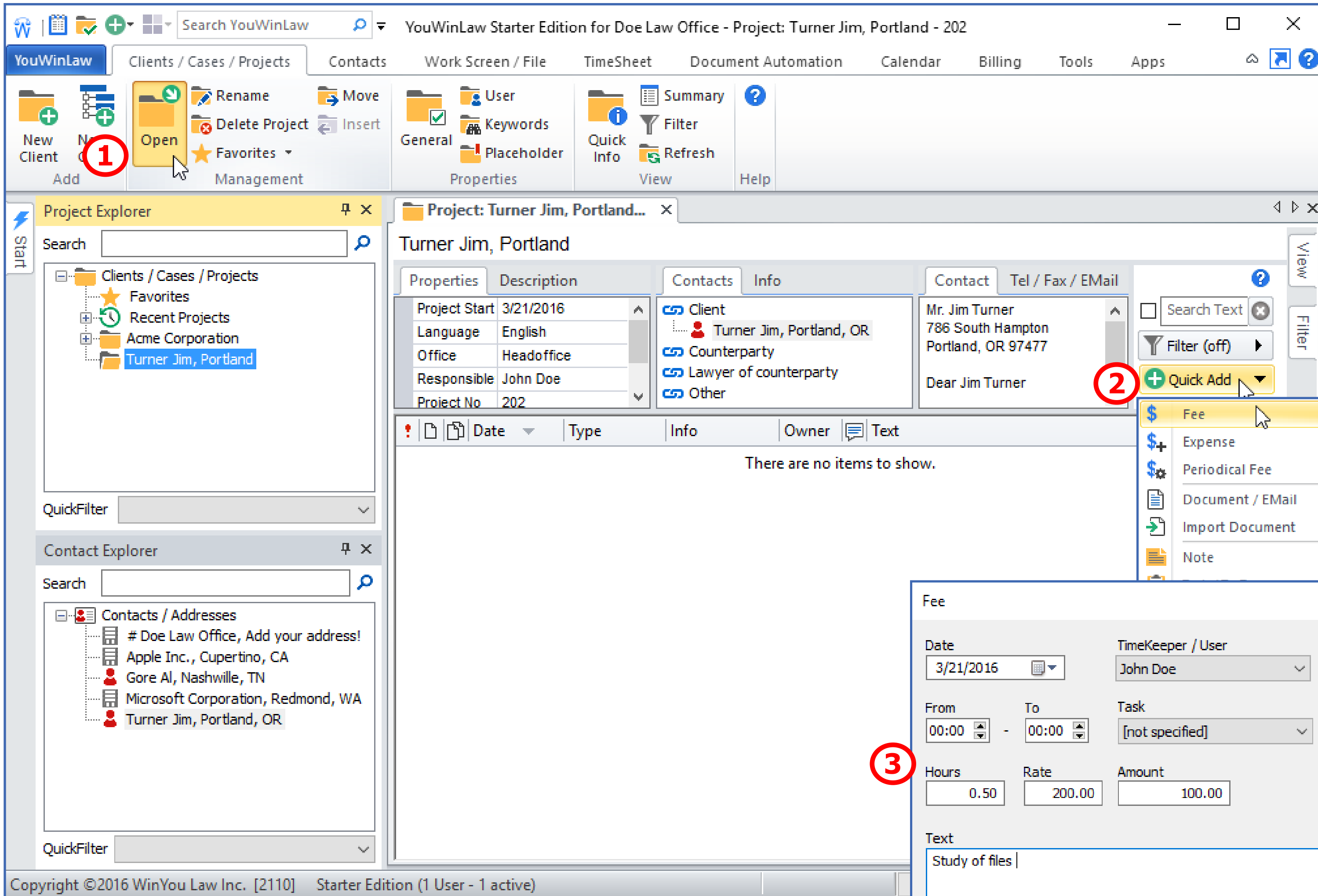
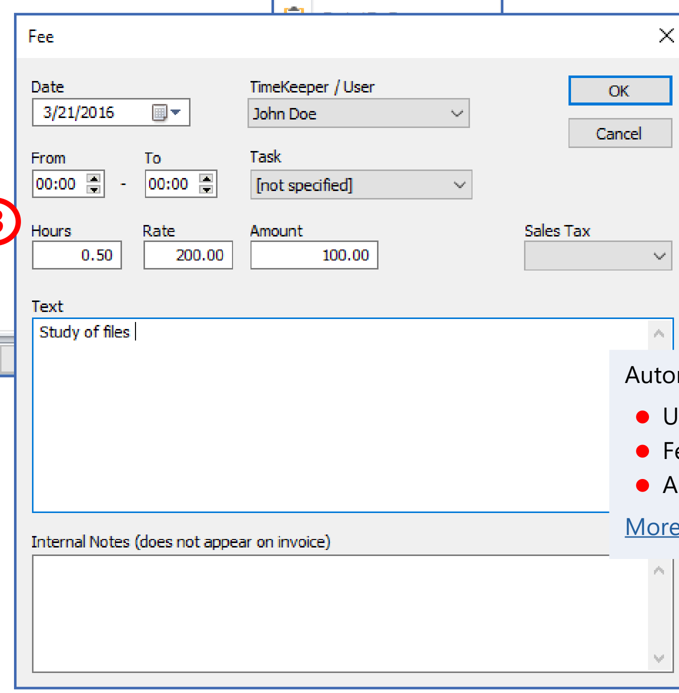




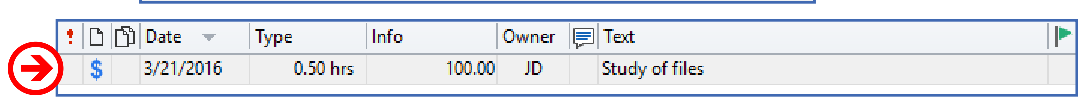
Automatic propositions:

- User
- Fee Rate
- AutoText (Shortcuts)

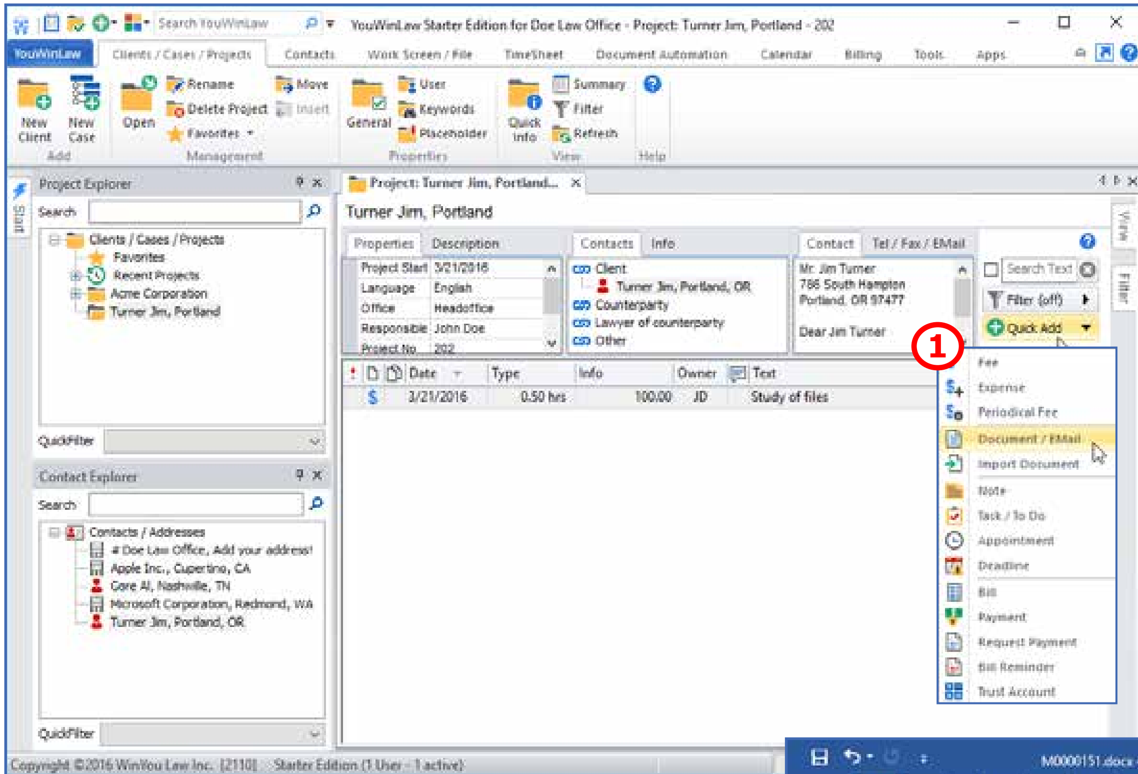
More Information

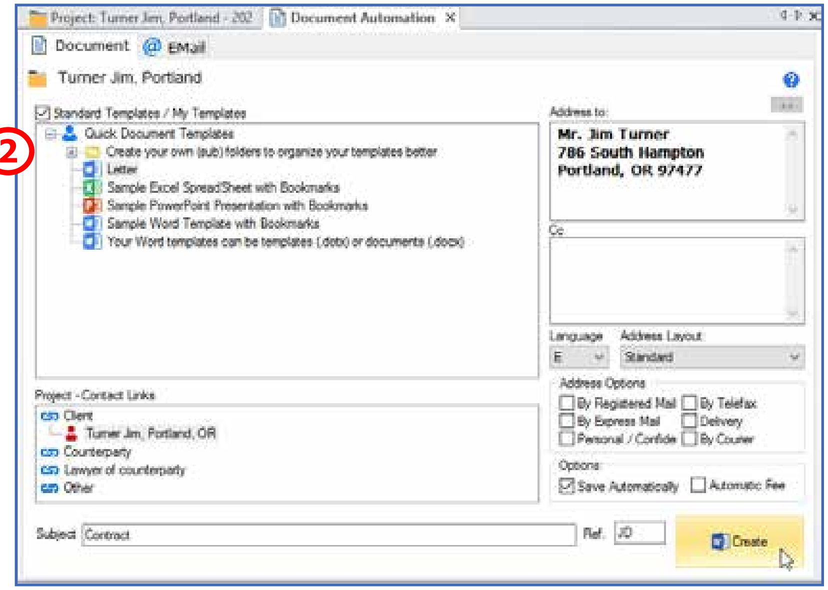
1. Select a Client in the Project Explorer and click on «Open»
2. Click on «Quick Add» and select «Fee»
3. Enter your fee data: 0.5h and “sof” + space (shortcut for Study of files)

➔ Result: a new Fee Entry



Tip 3: Create a Document





1. Click on «Quick Add» and select «Document / Email»
2. Select the Template, Recipient and Subject, click on «Create»

➔ Result: the finished Document is created and you can start writing

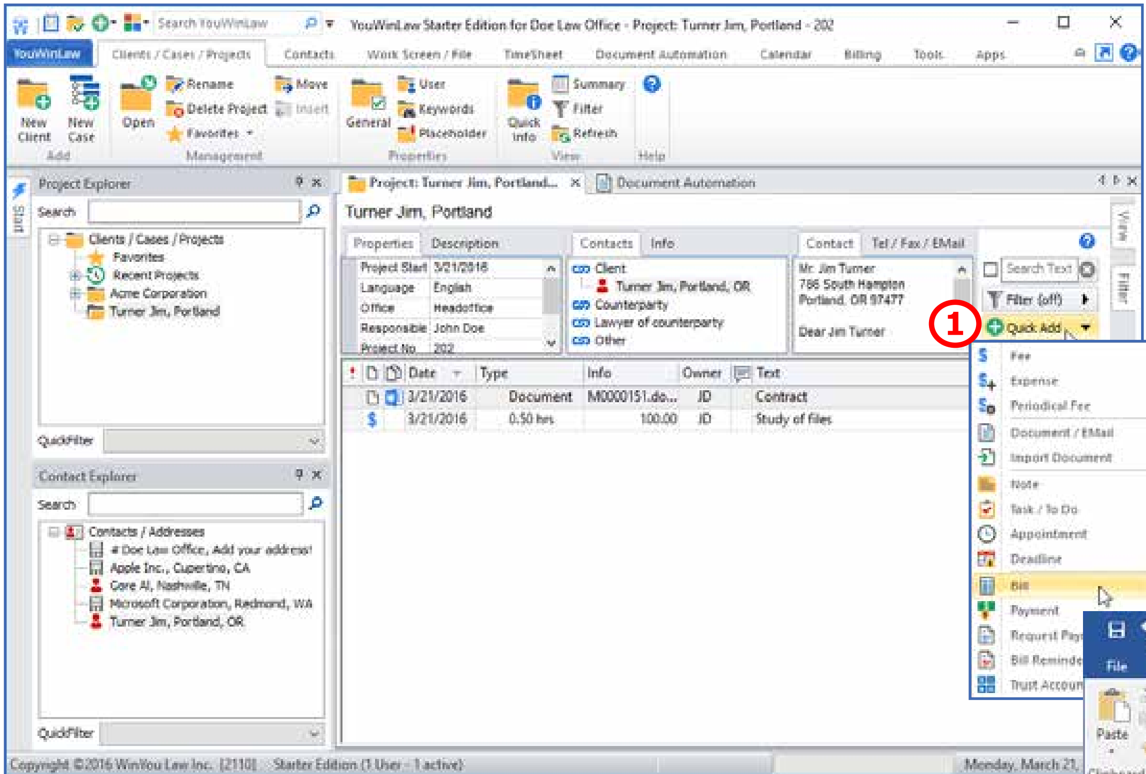
With this few steps, the following processes are automatically running in the background:

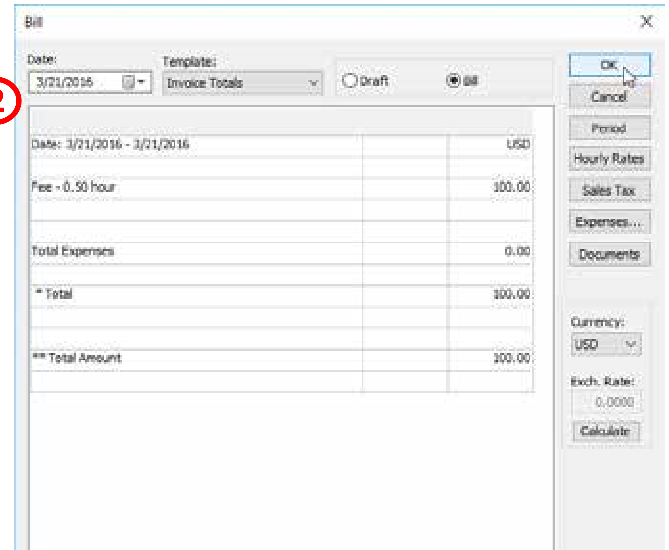
- Bookmarks in the selected template are replaced with text such as address, greeting line, etc.
- Automatic Address Representation
- Word document is automatically saved in the YouWinLaw Document Folder
- Document entry is created in YouWinLaw Client File
- Microsoft Word opens the document

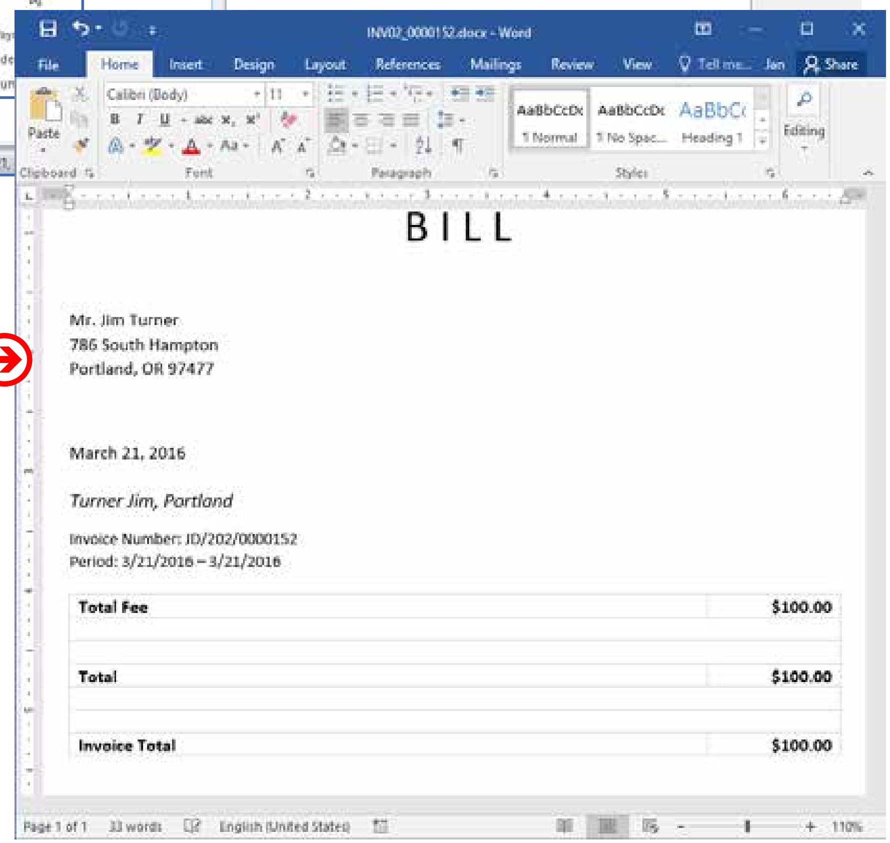
i.e. you can focus on the text in the document

More Information

Tip 4: Bill a Client







1. Click on «Quick Add» and select «Bill»
2. Select the Template, select «Bill» for final, click on «OK»

➔ Result: the final Bill is created in Word and you can even send it via Email

With this few steps, the following processes are automatically running in the background:

- Bill is generated and saved in a Word Document
- Billing entry is created in YouWinLaw Client File
- The corresponding entries in Client File are marked as billed

More Information

Tip 5: Send Word Documents as PDF with Email

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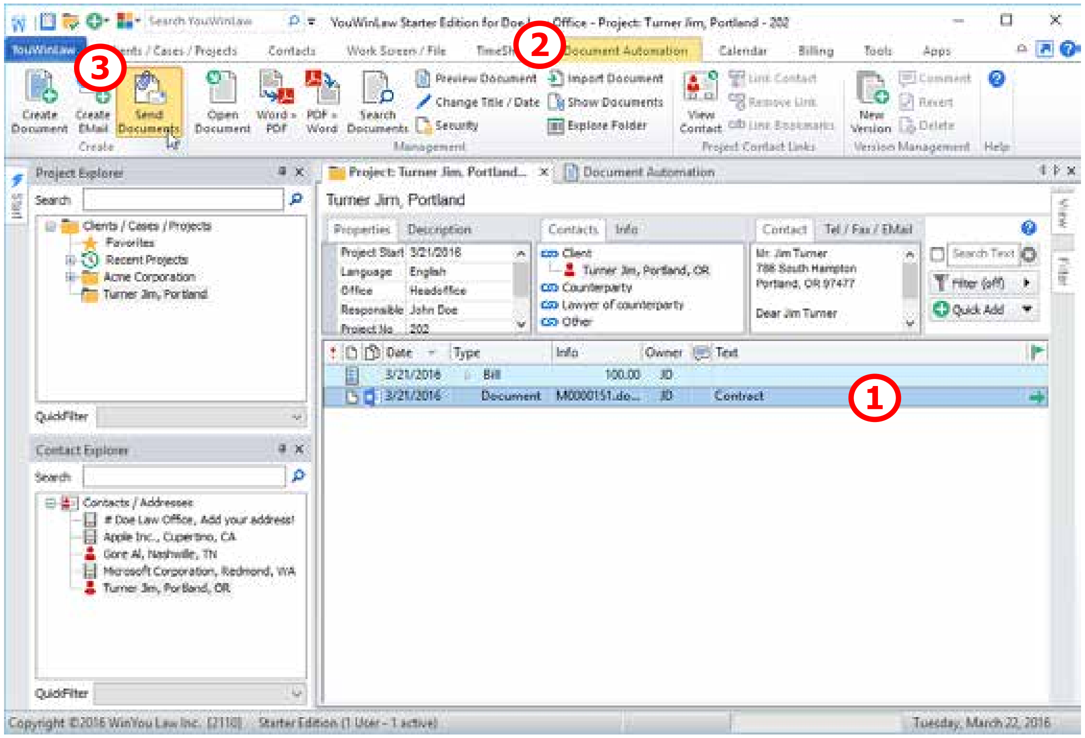
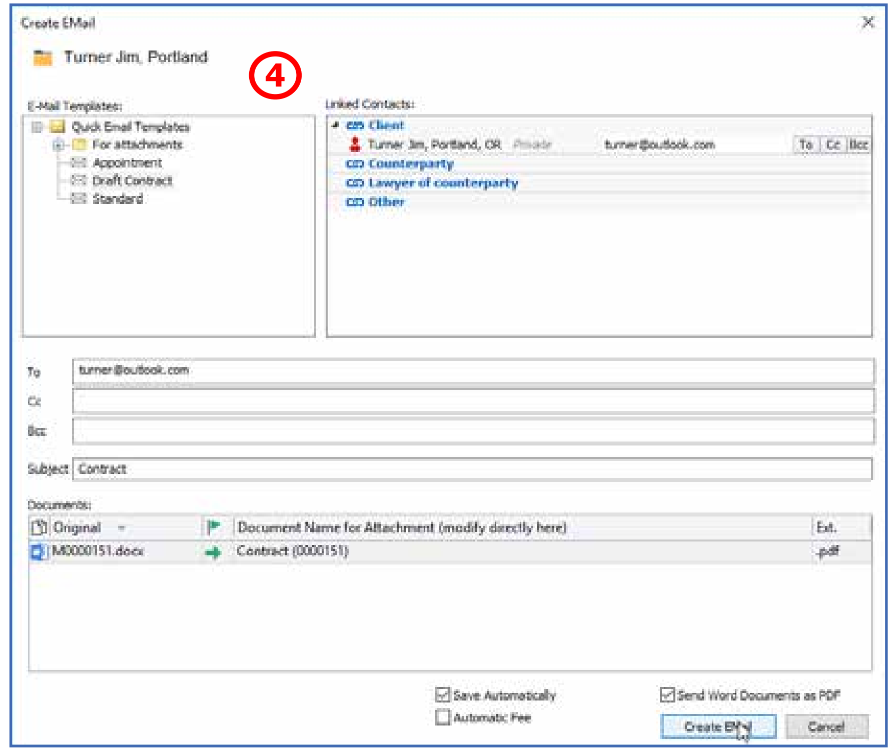
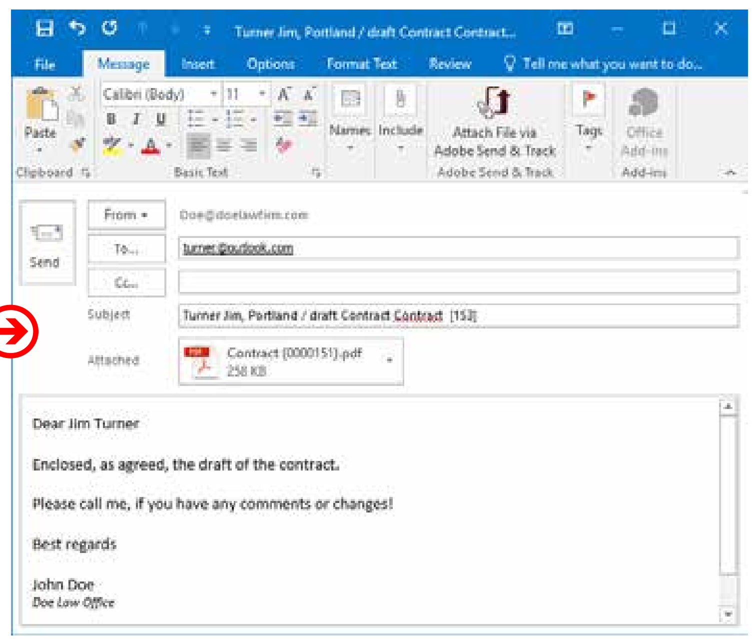




1. Select the documents you want to send
2. Click on «Document Automation»
3. Click on «Send Documents»
4. Select an Email Template, To Address, enter the Subject, check «Send Word Documents as PDF» and afterwards, click on «Create Email»

➔ Result: Email with attachments is created



With this few steps, the following processes are automatically running in the background:

- Email will be generated and displayed in Outlook. More changes can be made here.
- Own email templates with the same bookmarks as in Word templates
- “One Click” to add email addresses
- EMail entry is created in YouWinLaw with a link to Outlook. No double storage of emails.

[More Information]

Tip 6: Copy an Outlook Email to a Client File

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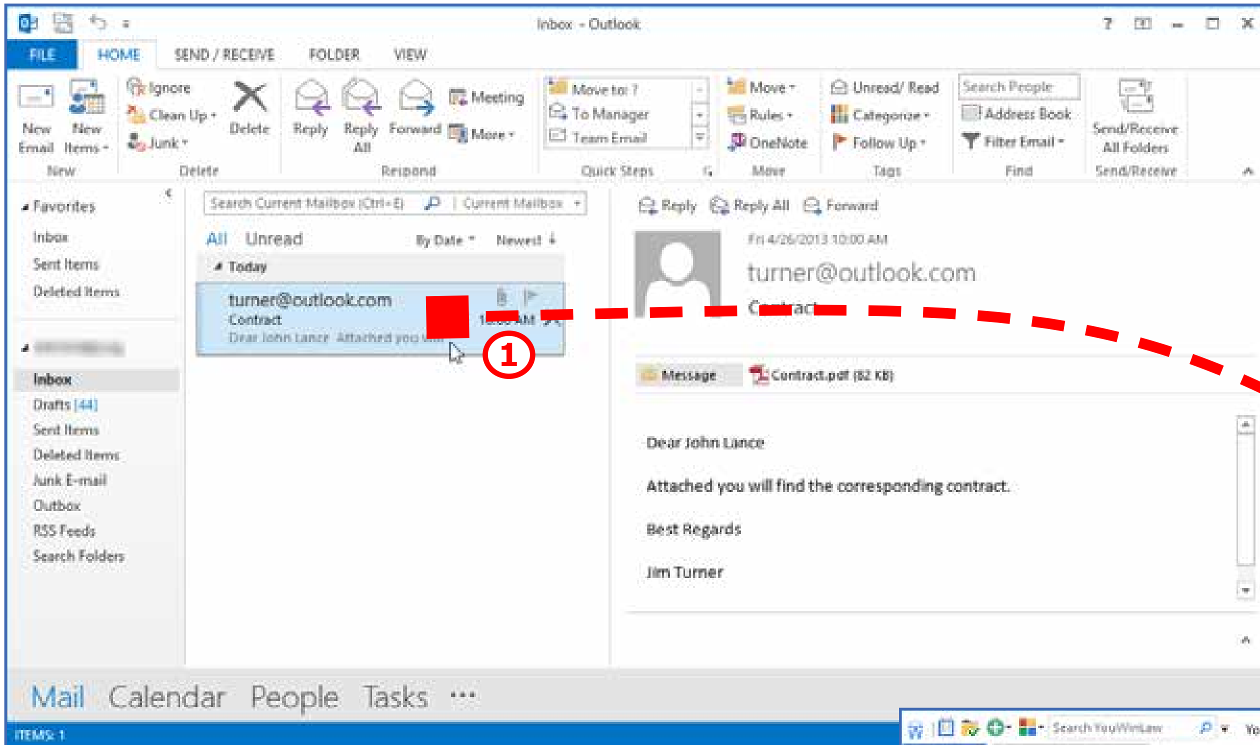

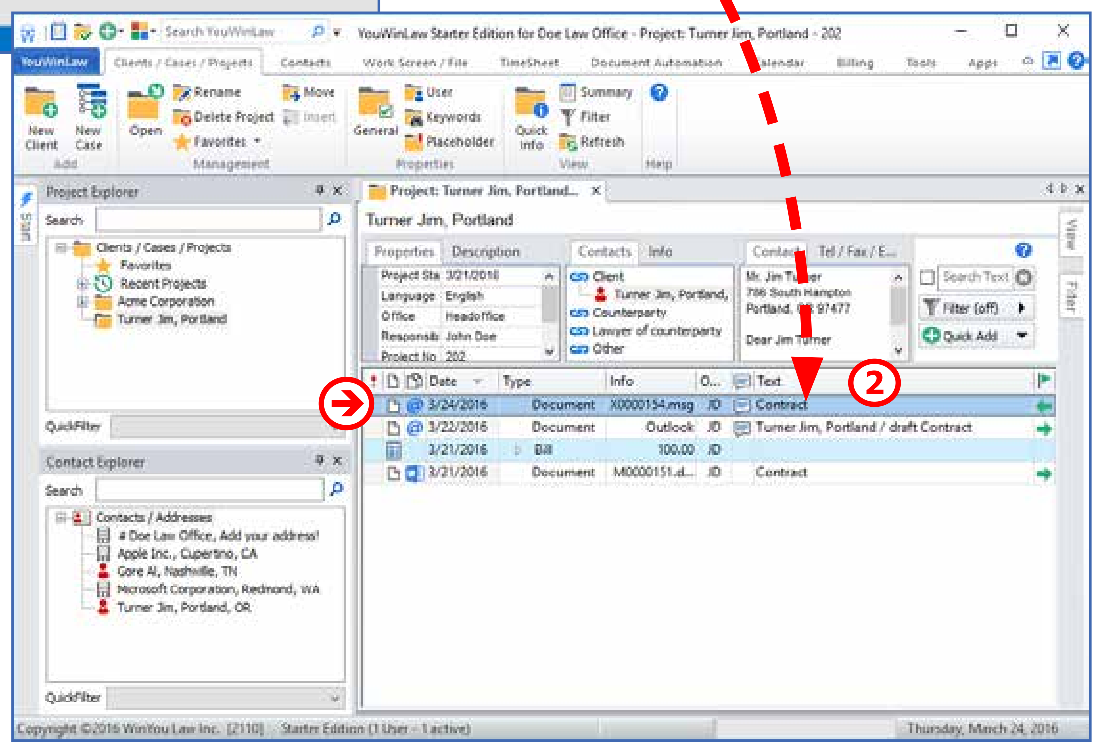

1. Select an Email in the Outlook Inbox and hold the left mouse button
2. Move the mouse to the appropriate YouWinLaw Client File and release the mouse button

➔ Result: a new Email Entry

Drag & Drop Outlook Emails or Attachments to a Client File / Work Screen:

- Email is copied into the Client File (**physical copy**)
- All documents in email attachments are also copied

You can also Drag & Drop Documents **from** YouWinLaw to an Outlook Email directly!