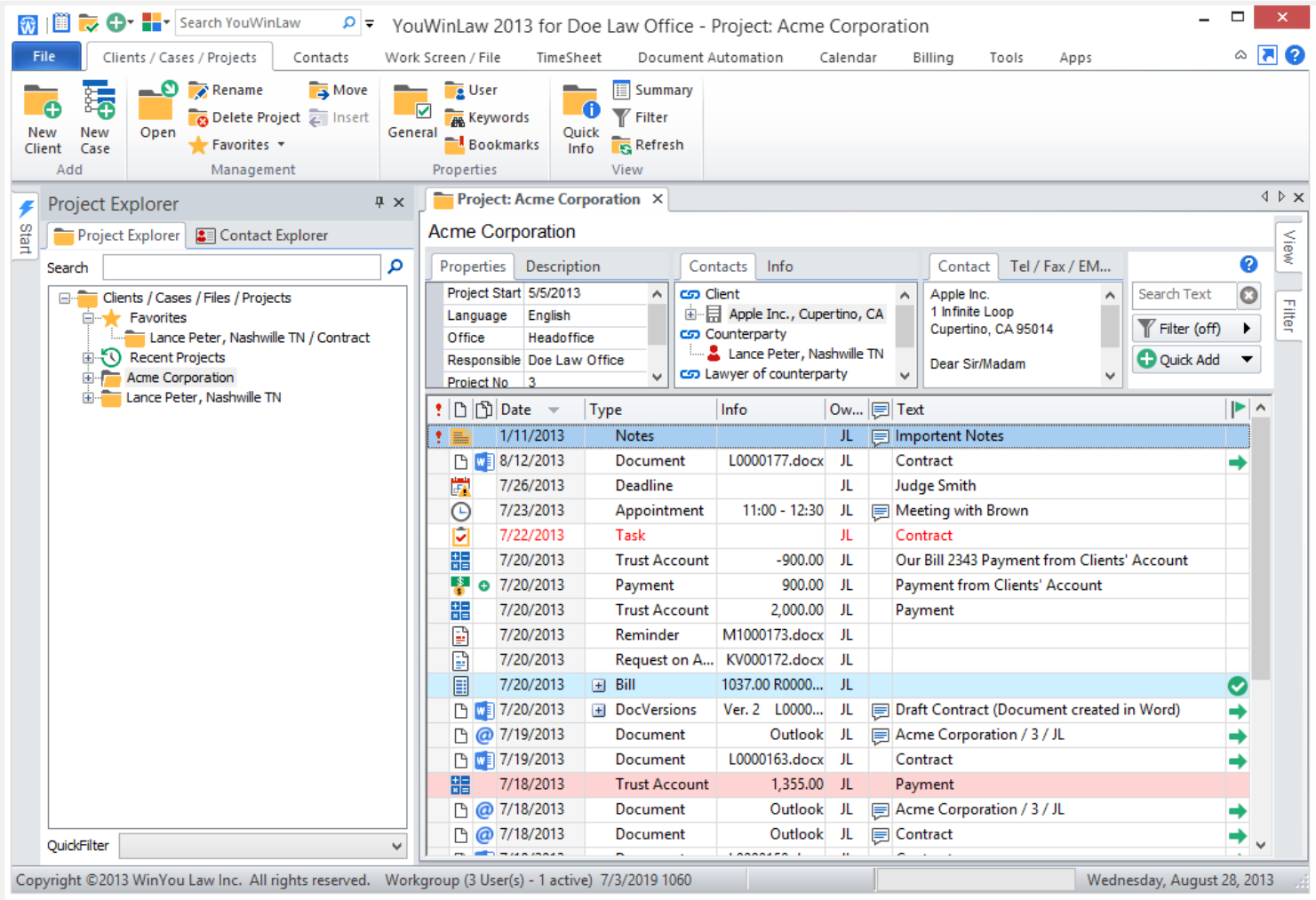


# What is New in YouWinLaw

This document describes some of the new features of YouWinLaw

## New “Look”



Similar to Microsoft Word 2013  
or Microsoft Outlook 2013

# Document Automation

New, individual User defined Bookmark fields which can be used in Document Automation. You can define bookmark fields on all levels in YouWinLaw (Client / Project, Contact / Address and linked Project-Contact).

How does this work? Sample based on the Client / Project Properties.

The image illustrates the workflow of document automation in Microsoft Word. It features several overlapping windows:

- Project Properties:** A dialog box for 'Acme Corporation' with a 'Bookmarks / Data Fields' tab. It shows a 'My Info Field' containing the text 'My Client / 456'.
- Document Automation / Bookmarks:** A window showing a tree view of bookmark categories. Under 'User defined Bookmarks', 'My Info Field' is highlighted. A red arrow points from this field to the document.
- weLetter.docx [Compatibility Mode] - Word:** A document window showing a letter template with various placeholder fields: [Address], [LongDate], (User\_Initials) / (Owner\_Initials), [Subject] / [My Info Field], [Salutation], [Start], Yours sincerely, and [User\_Name]. A red arrow points from the 'My Info Field' in the bookmark window to the '[Subject] / [My Info Field]' placeholder.
- L0000185.docx [Compatibility Mode] - Word:** A document window showing the final rendered letter. The 'My Info Field' placeholder has been replaced with the text 'Contract / My Client / 456'. A red arrow points from the 'My Info Field' in the 'Project Properties' dialog to this rendered text.

A text box on the left states: "Field name is also bookmark name".

## Bookmarks: Client / Project Properties:

The screenshot shows the 'Project Properties' dialog box for 'Acme Corporation'. The 'Bookmarks / Data Fields' section is active, showing a table with one entry: 'My Info Field' with the value 'My Client / 456'. Below the table, a note states 'My Info Field These fields can be customized (Administrator)'. The left sidebar has 'Bookmarks (Data Fields)' selected. Buttons for 'OK' and 'Cancel' are at the bottom right.

Fields can be defined with the YouWinLaw Administrator

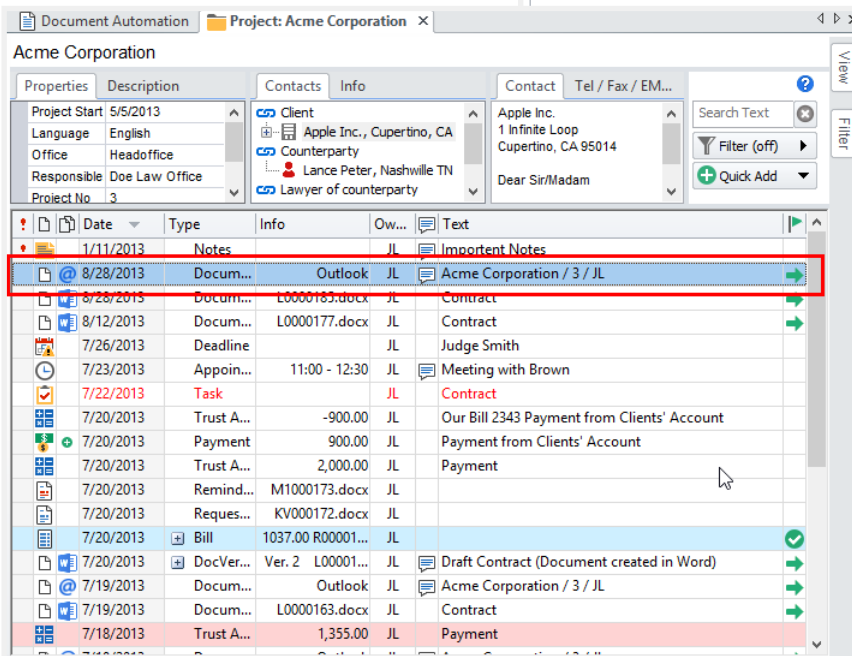
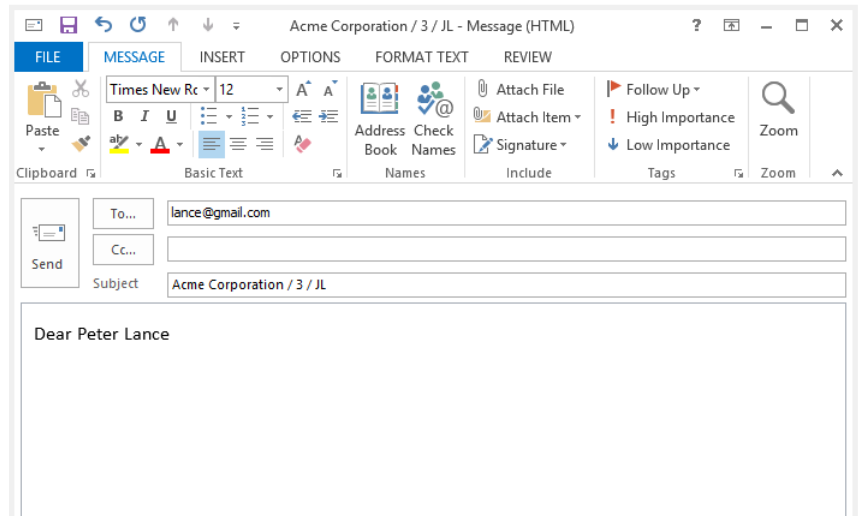
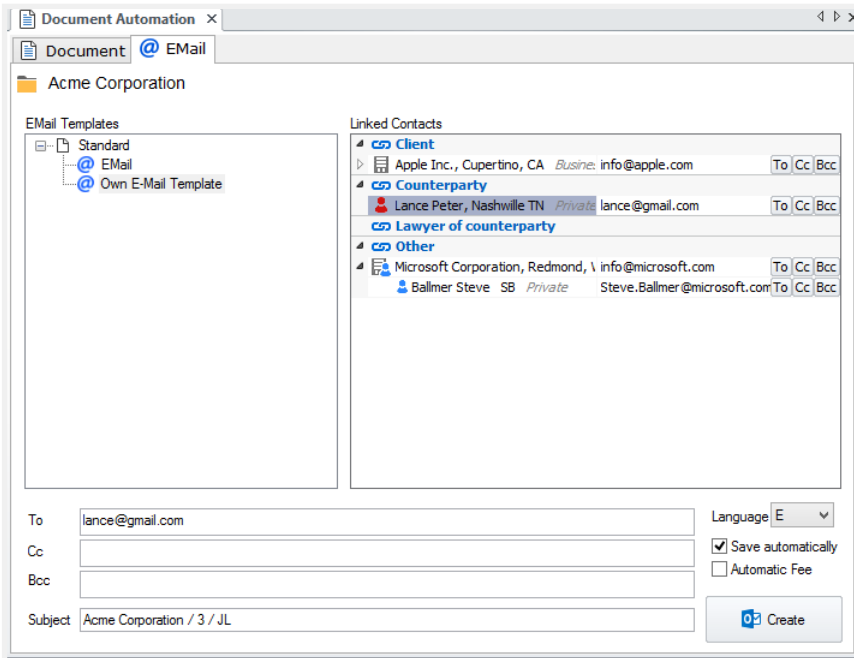
## Bookmarks: Contact / Address:

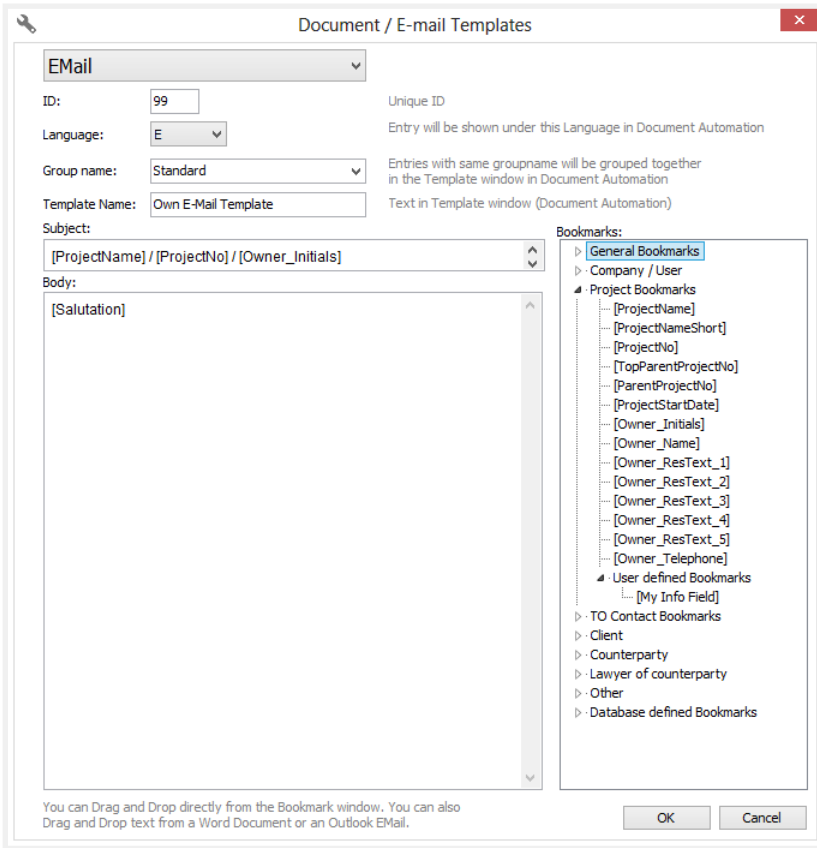
The screenshot shows the 'Contact: Microsoft Corporati...' dialog box. The 'Address Information' tab is selected, showing a table with 'My Info Field' and a 'Modify' button. Below it is a yellow highlighted area. The 'Security' section shows a table with fields like '#', 'Status', 'Created', and 'Last changed by'. Buttons for 'Address Information', 'Bookmarks', and 'Linked Clients / Matters / Projects - Network' are at the top.

## Bookmarks: Link:

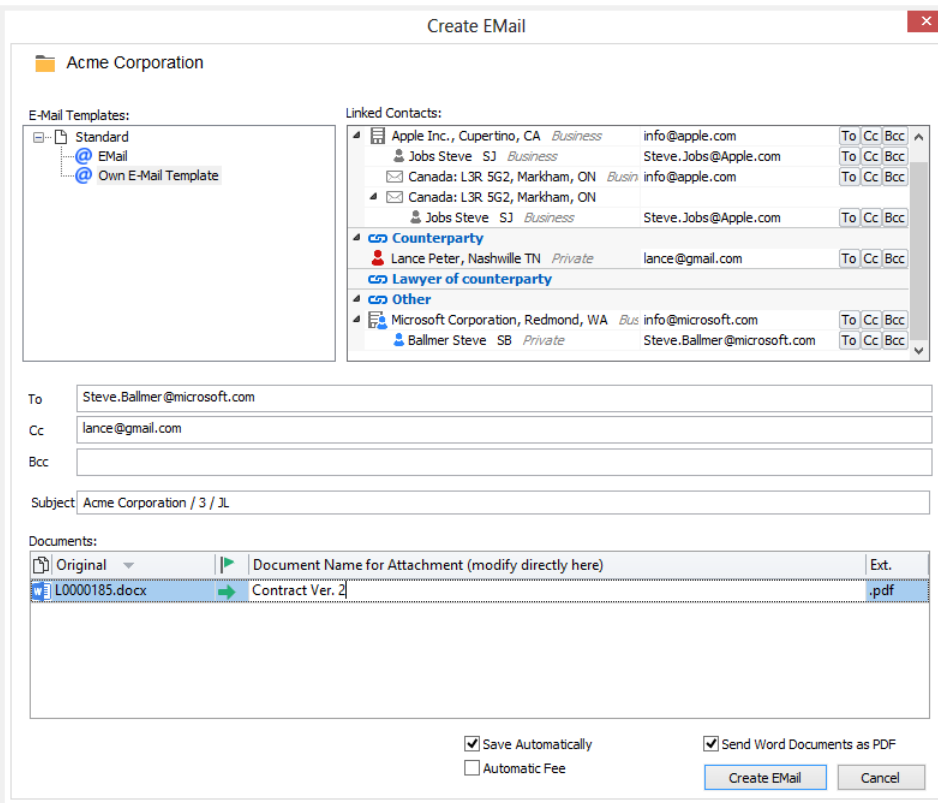
The screenshot shows the 'Link Bookmarks' dialog box. The 'General' section is active, showing a table with one entry: 'My Info Link Field'. A grey bar is at the bottom of the main content area. An 'OK' button is at the bottom right.

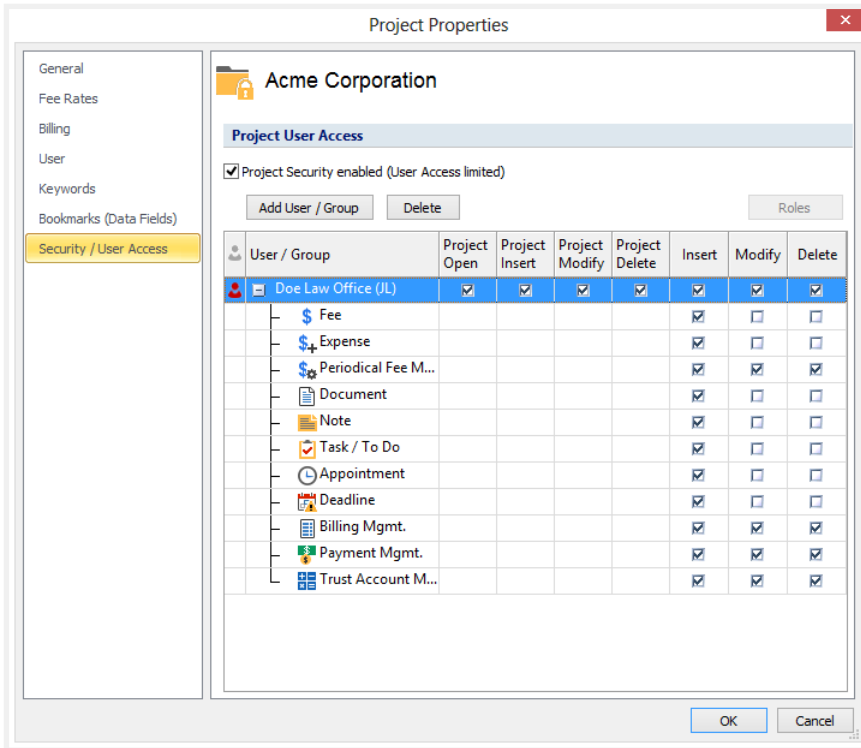
# Create E-mail with Templates (including Bookmarks):



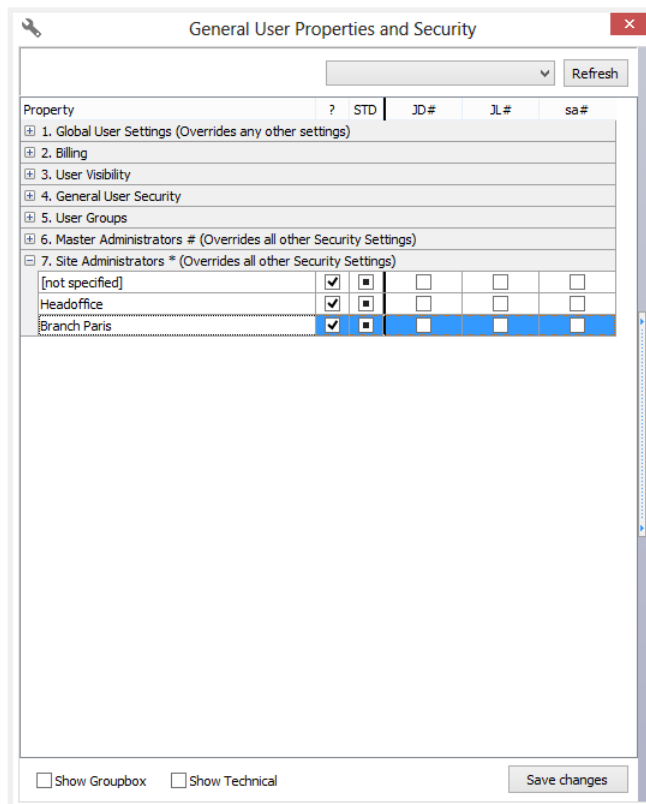


## Send documents directly with E-mail (using same e-mail templates)





General User Security / Properties in YouWinLaw Administrator:



Project Properties

General

Acme Corporation

**General Properties**

Project number:

Responsible: Doe Law Office

Project Start: 5/ 5/2013

Language: English

Status: Active

Office: Headoffice

**General Information**

Description:

Info:

Filing:

Previous Project Info:

**Project Created / Modified**

Created: sa (14.11.2012)  
Modified: JL (28.08.2013)

New design project properties

New Bookmarks  
New Security

Project Properties

Acme Corporation

**Differring User Fee Rates for this Project**

User	Rate	Standard

Add User  
Modify Rate  
Remove User

These Fee Rates are valid only for this Project!

**Fixed Fee Rate for this Project**

Hourly Rate:  These fields overrides the standard Fee Rate of the User or the above-defined Project User Fee Rates.

Price per copy:

Price per mile:

OK Cancel

Project Properties

Acme Corporation

**Create Bill**

Bill Form: Detailed

Sales Tax:

Currency: USD

Invoice Interval: Weekly

Type of Bill: Individual

**Properties**

Budget:

Internal Project

Billed / Locked

No Accounting

eBilling:

Project Properties

Acme Corporation

**Assign Keywords**

Available Keywords:

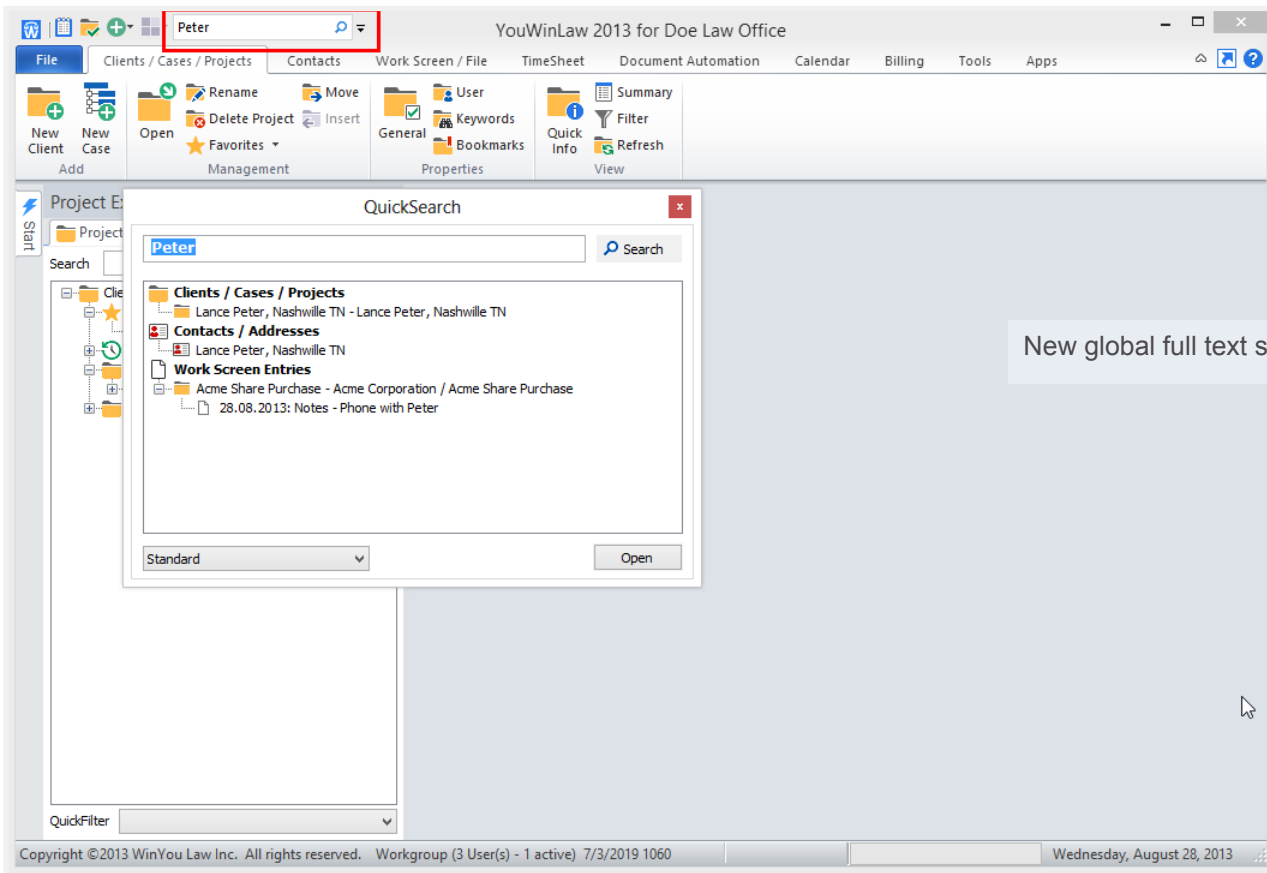
- Administration of the property
- Arbitrator
- Banks
- General
- Immaterial right
- Law of associations
- Law on competition
- Procedural law
- Tax laws

Assigned Keywords:

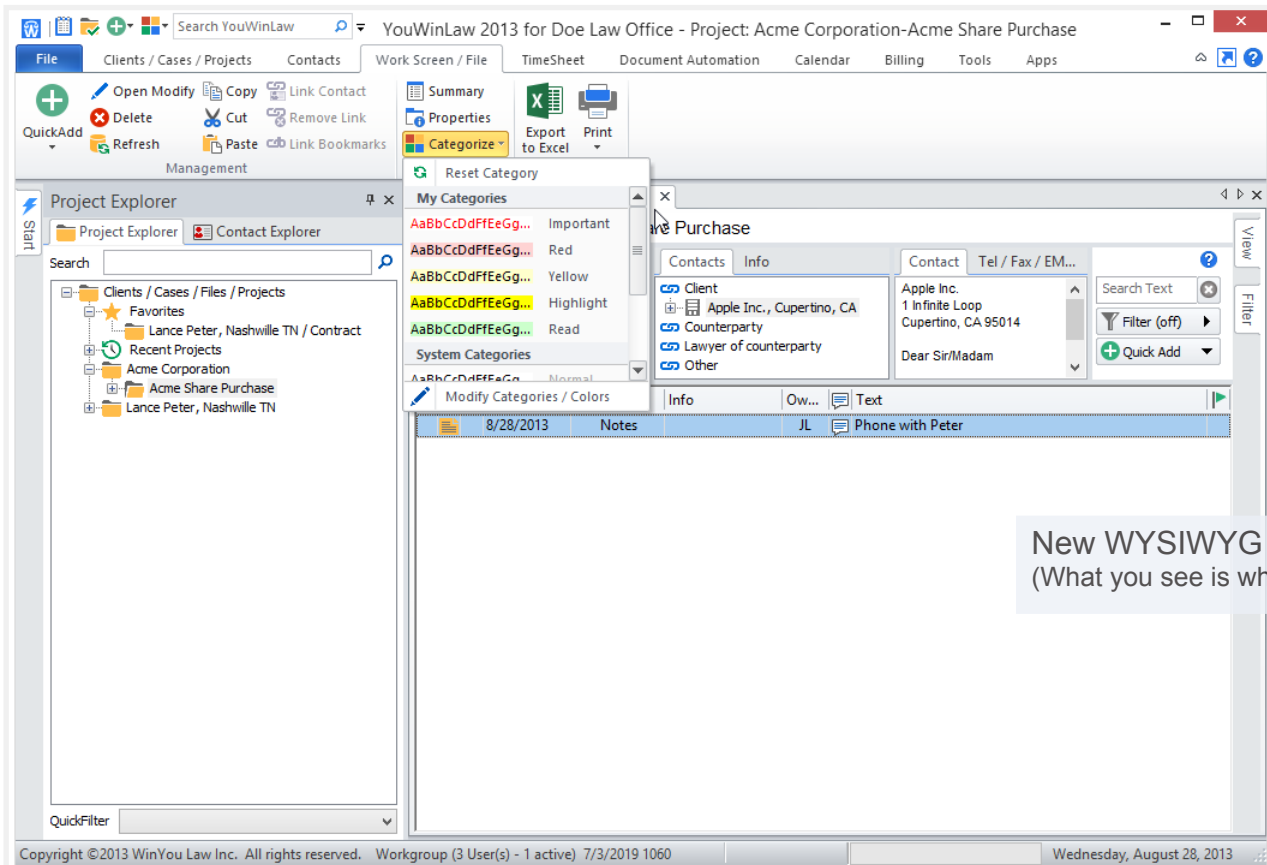
Banks

Select ->  
<- Remove

OK Cancel



## Categories





## New Client (simplified procedure)

New Contact / Client

Enter Contact / Address details now (or search)

**Contact / Address Details**

Personal Address

Mr. / Mrs.

First Name

Last Name

Greeting line: Dear

Street

Zip / City

Phone

Mobile

E-mail

Web

**Client / Project Details**

Name

Description

The Contact will be saved as a separate Address and will automatically be linked with the client.

OK Cancel

Combines all data:  
- Contact / Address  
- Client / Project

Includes duplicate check

## Document Previewer

Preview

**Contract**  
L0000185.docx  
C:\Users\Jan\Documents\YouWinLaw\AutoDoc\000000-000500\000003\L0000

Apple Inc.  
1 Infinite Loop  
Cupertino, CA 95014

August 28, 2013  
JL / JL

**Contract / My Client / 456**

Dear Sir/Madam

Yours sincerely  
Doe Law Office

Works the same way as a tool tip: just move the mouse cursor over the document name in the work screen and the previewer pops up.

Supports all formats (same as the operating system)

- Word Documents
- E-mails
- PDF Documents
- Excel Spreadsheets
- Powerpoint Presentations
- Scanned documents
- Voice Recordings
- Images
- ...

Quick Info

Acme Corporation

Responsible: Doe Law Office

Status: Active

Language: English

Description

Info

Filing

Record for: Doe Law Office

Save

August 2013

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	28	29	30	31	1	2	3
32	4	5	6	7	8	9	10
33	11	12	13	14	15	16	17
34	18	19	20	21	22	23	24
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7

Quick Info

Acme Corporation

Responsible: Doe Law Office

Status: Active

Language: English

You can have different views

Documents, e-mails, attachments, voice recordings...

