Daylite for legal professionals

Overview

This database template is designed to help attorneys and other legal professionals understand how Daylite can organize information and manage business processes more effectively. If you are an experienced Daylite user, you can also benefit from this template by looking at the sample workflow and suggestions to enhance your productivity. You can completely customize this template and enrich the content by adding information relevant to your practice.

Projects

In this template, a project is synonymous with case or trial. The project is the key element at the centre of your law practice. All other items in Daylite have relevance with respect to the project.

You can visually track how a project is organized by using pipelines. This template has the following pipelines:

1. **Case Outline:** A set of workflow stages for tracking a general court case.

2. **Divorce Consultation:** A set of workflow stages for tracking a divorce case.

3. **Estate Planning:** A set of workflow stages for tracking an estate planning case.

4. **Accident Trial:** A set of workflow stages for tracking the proceedings of an accident.

You can completely customize how you manage projects by setting up custom pipelines.

Forms & Fields

Forms enable you to collect and store information. Whether you are gathering the personal information of a new client or working with something more specific to your case, you can add a form for an object to capture the information. This template has the following forms:

1. **New client**: This form can be used to record information about a new client.

2. **Additional information**: This form can be used to collect additional information about your clients.

3. **Medical record**: This form can be used to record medical information for clients who were admitted to hospitals due to an accident or injury.

4. **Accident**: This form can be used to record accident related information.

5. **Marital history**: This form can be used to record the marital history of your clients.

You can customize forms by creating forms that ask questions specific to the type of law you are practicing.

Activity Sets

In your workflow, if you notice that you do certain tasks and appointments over and over again and in the same order, then using activity sets can be very time saving. We have included *Rule-based scheduling* (*or reverse activity sets*) in Daylite specifically for the field of law. This template has the following activity sets:

1. **Civil Trial:** A series of tasks or time-blocks, ready to be retrieved and applied to a civil trial case.

2. **Accident:** A series of tasks or time-blocks, ready to be retrieved and applied to an accident/injury case.

3. **Estate planning:** A series of tasks or time-blocks, ready to be retrieved and applied to an estate planning/estate litigation case.

4. **Divorce:** A series of tasks or time-blocks, ready to be retrieved and applied to a divorce case.

5. **Guardianship:** A series of tasks or time-blocks, ready to be retrieved and applied to a guardianship case.

6. **Initial Consultation:** A series of tasks or time-blocks, ready to be retrieved and applied for defining the initial consultation process.

You can set up your own activity sets in the preferences and customize where in Daylite they will be available.

General Workflow

1. When a person calls your office for the first time, do the following:
    a. Create a new contact record and enter all the details about that person.
    b. Tag the contact with the category *Prospect*. This shows that you intend to evaluate different constraints and then decide whether you can take on the case.
    c. Record any additional case details either with the custom forms we have set up and/or simply log it into a note.
    d. If this contact was referred by someone else, you can link the 2 contacts through a relationship *referred/was referred by*.
    e. Apply the Initial Consultation activity set that defines a standard set of tasks and appointments that you would complete for the contact. As you work through these tasks and appointments, you will get a fairly good idea of whether you wish to continue handling the case or terminate it.
    f. If you wish to take the case, create a new project and enter the relevant information. Otherwise, tag the contact with the category *My rejections* or delete the contact and its activities.
2. Once you create a new project, do the following:
    a. Tag the project with a category that best describes it such as Civil Trial, Labor Law, Family Law, Social Security, or any other.
    Tagging projects with categories makes it easy for grouping and retrieval (such as viewing all family law cases or accident cases you are handling in a list). Use keywords for more detailed classification—for example, if you have tagged a project with the category *Accident*, then the keyword *Automobile* is appropriate. This allows you to dig deeper with your searches using Smart lists.
    b. Use the link button to link the people who will participate in this case. The roles are already entered into the database, so you simply choose who plays what role.
    c. You can allocate a pipeline for visually tracking your project; as you progress, you can change the stages of the project pipeline and see the case moving forward to completion.
    d. Assign an activity set to define the tasks and appointments that you should complete for this project.

3. For billing purposes, send the project from Daylite to Billings (You should have the latest versions of Daylite and Billings to do this).
    a. Launch Billings.
    b. Choose Billings > Preferences, click Labels, and click Workers. Select the Enable labeling slips with workers checkbox.
    c. Add a new client in Billings. Ensure that you add an existing client from Daylite.Billings asks if you wish to bring in associated case(s) which are linked to that client from Daylite as estimate or working slips. Do so, based on your choice.
    d. Once you bring in the associated cases, select the slips for the project that you wish to invoice, create an invoice and preview it before sending. If you have a previous balance from the same project that you want to see carried over, select it in the invoice options.

       Quick tip: If you pull a project from Daylite to Billings, and you make changes to that project in Daylite, then you can easily update in Billings by choosing Project > Update from Daylite.

   For additional information about the exact steps for working with Billings, choose *Help > Billings Help.*

Resources

There are a number of resources to help you learn more about Daylite and provide answers when you have technical questions.

- Our support website and knowledge base have many articles that can help you solve technical difficulties. Visit http://www.marketcircle.com/help/ for more information.

- We have interactive forums where you can share ideas, tips, and questions with fellow Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.