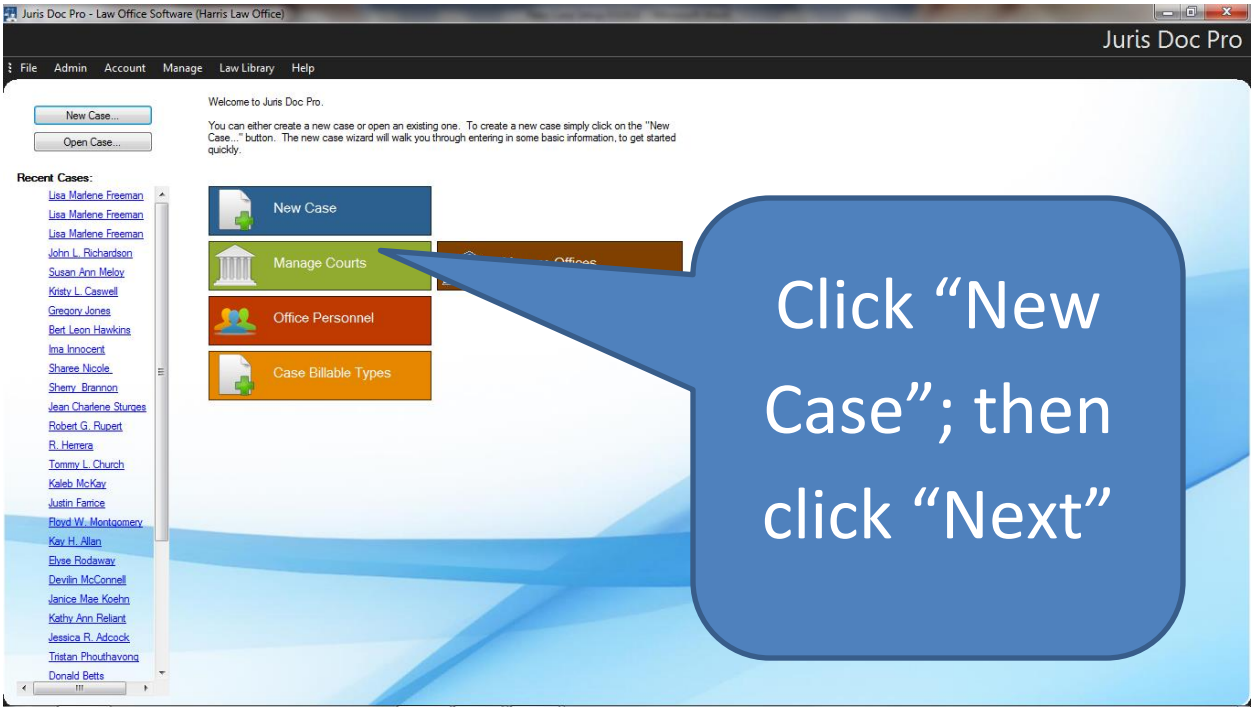
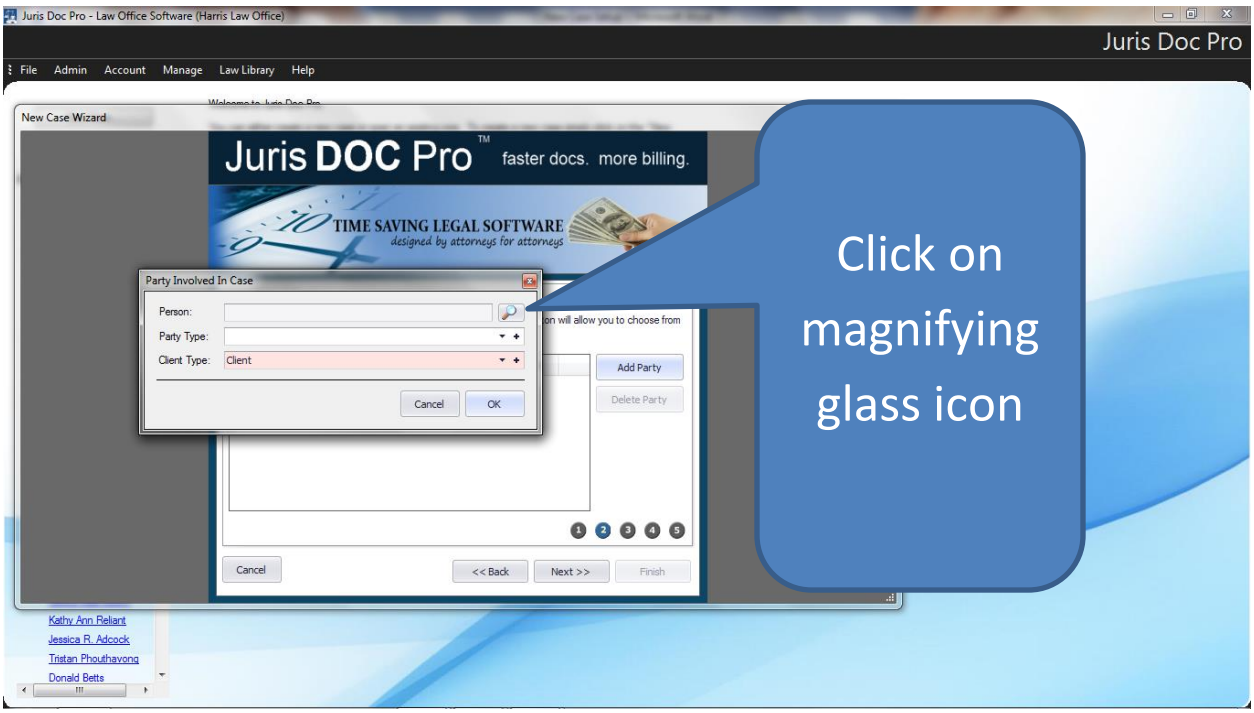
NEW CASE SETUP

1. Click on “New Case”

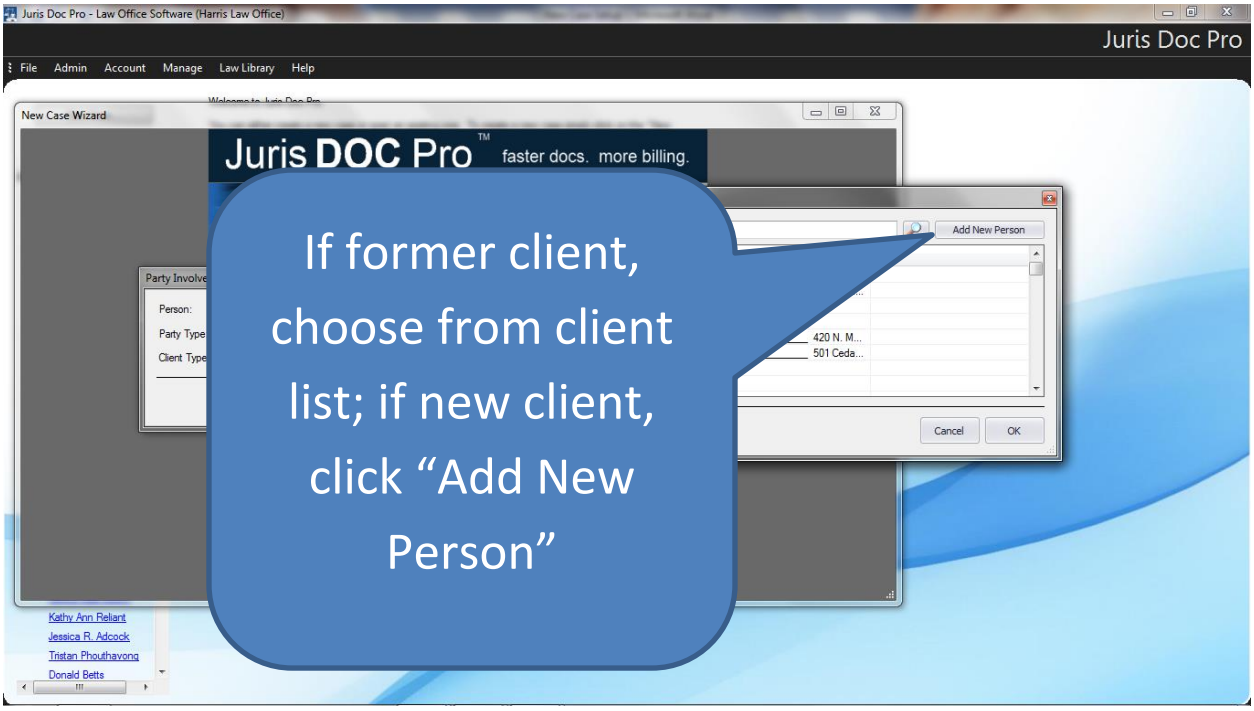


2. Enter appropriate info on Case interface screen

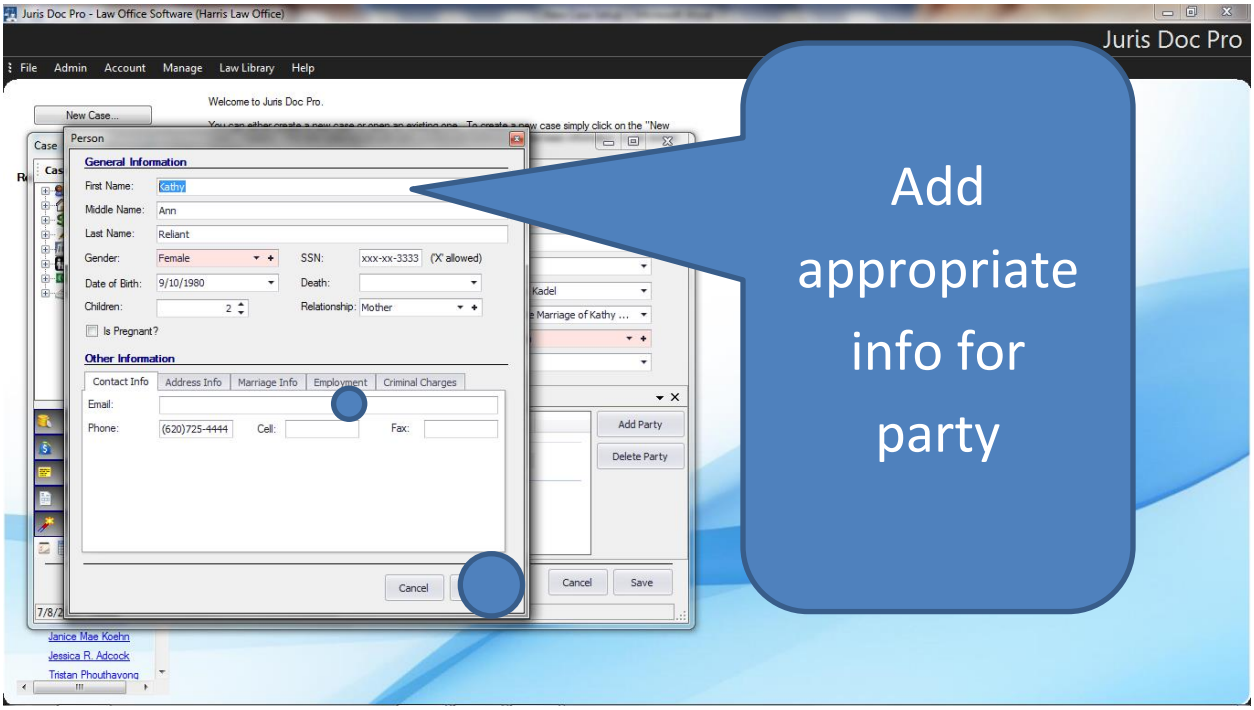
3. **Click to add client**



4. **Choose client from client list, or, if new client, click "Add New Person"**



5. Add appropriate info for party

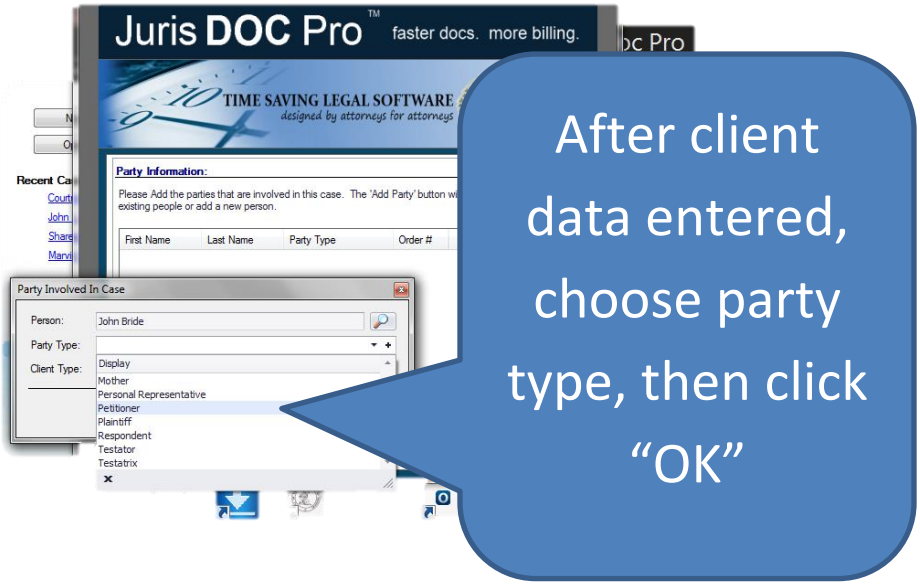


NOTE:

All information does not have to be entered on the interface screen (in most cases it can also be entered on the form); but it is a good idea to at least enter some minimal data for the parties, attorneys, children, properties / debts, BEFORE preparing a law form

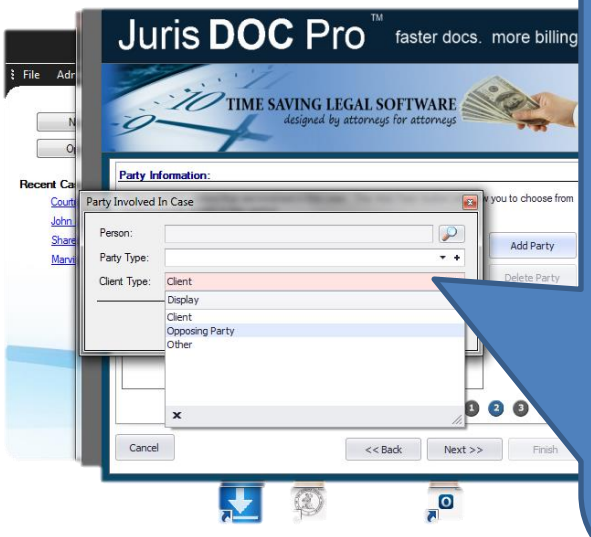
It is a good idea to EXPLORE and become familiar with each interface screen, to see where best to enter information (on the screen, or on the form), and the type of info that can be entered

6. **After client data entered, choose party type, then save**



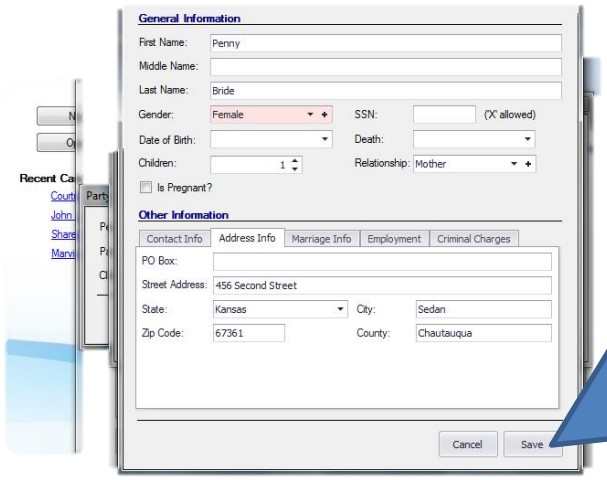
7. **Next, on Party Information screen, click on "Add Party" to add info for opposing party.**

8. Make sure you choose “Opposing Party” as the client type



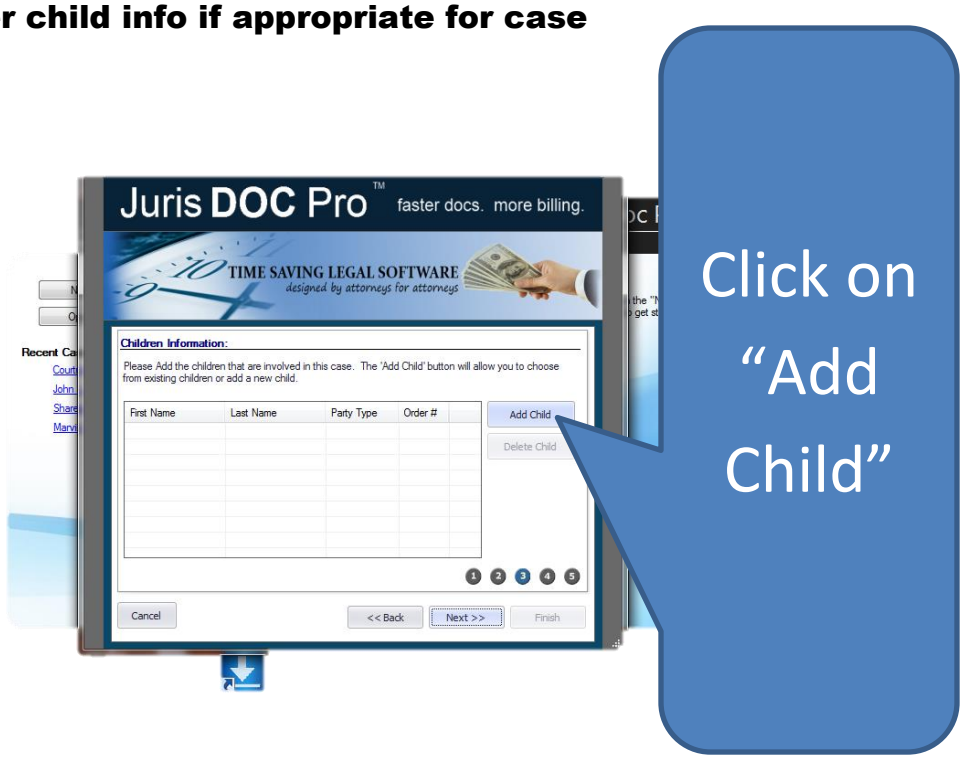
Choose “Opposing Party”; then click magnifying glass icon, and if party not on list, then “Add New Person”

9. Enter appropriate party info, then save

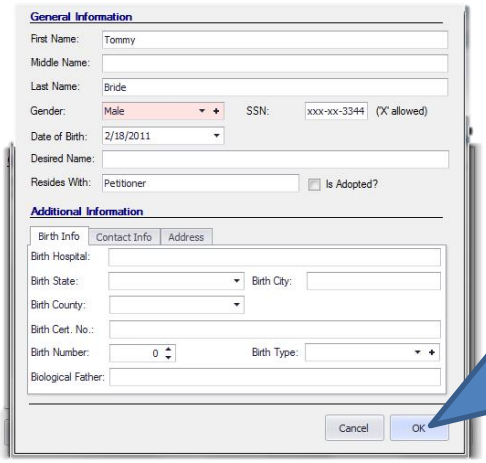


Enter appropriate party info, then save; choose party type; then click “OK”; then click “Save”

10. Enter child info if appropriate for case



11. Enter appropriate child info, then save



Enter child info, then click “OK”

Leave “Party Type” blank; then click “OK”; then click “OK”

12. Add attorney info

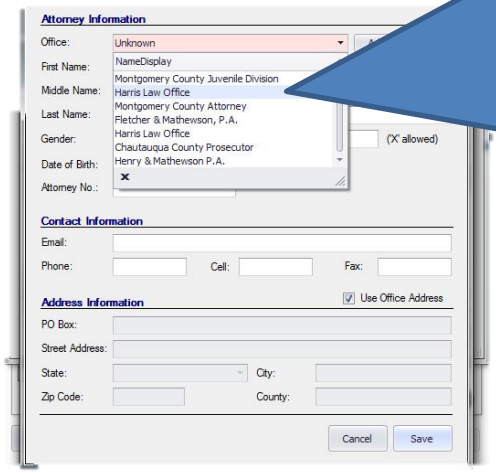
Click “Add Party Attorney”; if Guardian ad Litem involved, click “Add Child Attorney”

13. First add you as the attorney for your client

Choose your client; then click on magnifying icon to choose attorney

If your name is on list of attorneys, highlight it, then click “OK”; if not, click “Add New Attorney”

14. Enter new attorney info, if appropriate



Office is a required field; select your office from office list; if not on list, click “Add New Office” and complete office info; then complete appropriate attorney info; then “Save”

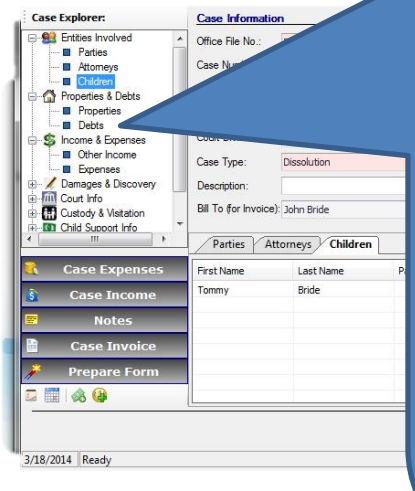
Then add info for other attorneys involved; then click “Next”

Choose involvement type, then click “OK”

15. Enter info on properties involved, if appropriate

Highlight property type, then double click and enter info on property; then save; if more than one item is for same property type, click on “Add Property” and enter info; when all property data entered, click “Finish”

16. Enter additional info on case through interface screens available from Case Explorer, or on the forms directly, as appropriate



Enter additional info on case through interface screens available from Case Explorer, or on the forms directly, as appropriate (ie, properties / debts; income / expenses; info regarding child custody, visitation or child support); then click “Save”