

Important Demo Notes

Introduction

Thank you for your interest in *Law Office Management – Version 2 (LOM2)*. As you can guess from the title above, it's very important that you read these notes *before* attempting to try out the demo version. With of our demo programs, the child support program for example, a form appears on your screen at startup and you can dive right in entering numbers and tabbing your way through the worksheet. *LOM2* is no more complicated to use, *however*, because it's actually a set of three interrelated programs, it requires an understanding of the relationship between the three programs.

The three main programs that make up *LOM2* are *ClientBase4 (CBase4)*, *BookBase4 (BBase4)*, and *BillBase4 (BillB4)*. Here's the function each program performs.

<i>CBase4</i>	Keeps track of client names, addresses, phone numbers, and just about any other note you can attach to a client's entry.
<i>BBase4</i>	Handles all of the financial entries involved in running a law office. This includes client-related transactions such as client payments and client expenses like payment of court costs, filing fees, <i>etc.</i>
<i>BillB4</i>	Stores billing information that is not handled by <i>BBase4</i> . This includes itemized statements of time and services. A typical example would be clients that are charged on an hourly basis wherein you need to keep track of your time and description of services, <i>i.e.</i> , "July 4, 2007 – Attending pretrial conference – 1.5 hours," or "July 17, 2007 – Visiting scene of accident - 0.75 hours," or "July 25, 2007 – Telephone conversation/interview with witness Mary Smith – 0.50 hours." Finally, <i>BillB4</i> prepares the monthly or periodic billing by performing the steps described below.

Billing Steps Performed by *BillB4*

- *BillB4* begins the bill preparation cycle by taking the balance forward (if there is one) that is automatically transferred from the prior month's bill;
- Prints your personal letterhead or caption at the top of the bill, saving billing stationery printing expenses;
- Looks up the client's full name and address from your *CBase4* file and prints it on the bill positioned for folding and placement in a window envelope - no more typing envelopes;
- Prints and itemizes any additional charges to the client's bill since the last bill, *i.e.*, filing fees, transcript cost, *etc.*; it gets this information from your *BBase4* file;
- Prints and credits any client payments (also from your *BBase4* file) made since the date of the last bill (or date you choose);
- Contains up to ten optional fill-in fields for special entries such as initial retainer charges, client discounts or whatever you choose;
- Prints the subtotal from any itemized billing statements you attach;

That's why we've put together the **Sample** for you

The Sample

If you think carefully about the steps performed by *BillB4* when it prepares a bill, you'll immediately see one of the important issues involved in using the demo – you can't just plunge into *BillB4* and attempt to create an example bill without first making sure that there is a client name and address in *CBase4* whose client number matches the client number of the bill you are intending to prepare.

Why are there client numbers? The answer is because if these programs didn't have a simple method for identifying clients, you'd need to type the names and address over and over again in each program. Furthermore, it would be difficult to distinguish clients with the same names (all the Joe Smiths of the world). That's why the government uses social security numbers!

Anyway, what we said about *BillB4* and *CBase4* is also true about *BillB4* and *BBase4*. In other words, when you generate a bill, the bill will not include any client payments or client expenses previously entered into *BBase4* unless the payments and expenses are identified with a client number that corresponds to the one assigned in *CBase4* and used to identify that client's bill in *BillB4*.

It's not at all complicated. In actual practice you'll use a standardized method of entering client information in *CBase4* first, then in *BBase4*, and finally in *BillB4*. Also don't be put off by the notion of client numbers. You never have to memorize or keep track of client numbers, *LOM2* does all that. When you type in the first few letters of a client's last name, the *LOM2* programs immediately begin sifting through the client numbers in order to automatically obtain the appropriate one. The only time you'll need to pay attention is for those six clients named "Smith, Joseph."

The purpose of this demo is to give you an idea of the look and feel of *LOM2* to see what a bill looks like. It's not intended for you to prepare your monthly billing (although, with the right preparation you could certainly do that). Toward this end, the *LOM2* demo comes preconfigured with a sample set of databases containing fictional client names and addresses with related bookkeeping transactions. Finally, we've created a sample billing file with three bills in it so you can print or preview these bills to see how they're prepared and what they look like. All you need to do is push a button. One bill is a flat fee bill showing a client payment or two. Another of the bills is provided to let you see what the itemized time/services statement looks like. In other words, to use the demo to print a bill you could simply start *BillB4*, open the *Sample.db* file, select a bill and press the print button. In fact, if you use *LOM2* like we do, making a few minutes worth of entries each day, preparing monthly billing involves opening the monthly billing file and hitting the print button. It takes about 15 seconds!

The Manual

You're not going to what to hear this but if you want to delve deeper into *LOM2* you absolutely must read the owners manual that is accessible from each program's **Help** menu. It can also be found on your hard drive as a pdf file at `C:\Program Files\OffMgt\lom2.pdf`.

Two other resources for learning about *LOM2*:

1. Call us at 330-278-3252. We can answer most questions quickly and thereby avoid you wasting your time.
2. For *LOM2* owners (and extra inquisitive demo users) we also have **Remote Assistance** wherein we can talk to you on the phone and give you lessons or demonstrations or perform setup directly on your computer. It is necessary that you have a high-speed Internet connection for this service, and there is a nominal charge. Don't be discouraged by the associated charge. In almost all instances, users have said it saved them countless hours involved in scaling the learning curve and hundreds of dollars in wasted time or computer-technician expenses.