Important Demo Notes

Introduction

Thank you for your interest in *Law Office Management – Version 5 (LOM5)*. 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 most 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. *LOM5* is no more complicated to use, *however*, because it's a set of three interrelated programs, it requires an understanding of the relationship between the three programs.

The three main programs that make up *LOM5* are *ClientBase5 (CBase5), BookBase5 (BBase5), and BillBase5 (BillB5)*. Here's the function each program performs.

CBase5	Keeps track of client names, addresses, phone numbers, and just about any other note you can attach to a client's entry.
BBase5	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, *etc*. This also includes non-client-related expenses such as paying the office rent, utilities, *etc*.
BillB5	Stores billing information that is not handled by *BBase5*. This includes itemized statements of time and services. A typical example would be clients that are charged on an hourly basis where you need to keep track of your time and description of services, *i.e.*, "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, *BillB5* prepares the monthly or periodic billing by performing the steps described below. There's also a greatly improved calendar that can handle all of your scheduling matters.

Billing Steps Performed by *BillB5*

- Begins the bill preparation cycle by printing 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 *CBase5* file and prints it on the bill positioned for folding and placement in a window envelope - no more typing envelopes;

- Takes the balance forward (if there is one) that is automatically transferred from the prior month's bill;

- Locates 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 *BBase5* file;

- Locates and credits any client payments (also from your *BBase5* file) made since the date of the last bill (or date you choose);

- Includes up to ten optional fill-in fields for special entries such as initial retainer charges, client discounts or whatever you choose;

- Calculates the subtotal from any itemized billing statements you attach;

- Prints the bill.

Because you probably have no prior experience with these programs, we've simplified the demo by putting together the Sample for you ….

The Sample

If you think carefully about the steps performed by *BillB5* when it prepares a bill, you should see one of the **potential stumbling blocks** involved in using the demo – you can't just plunge into *BillB5* and attempt to create an example bill without first making sure that there is a client name and address in *CBase5* 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!

Likewise, what we said about *BillB5* and *CBase5* is also true about *BillB5* and *BBase5*. In other words, when you generate a bill, the bill will not include any client payments or client expenses previously entered into *BBase5* unless the payments and expenses are identified with a client number that corresponds to the one assigned in *CBase5*. Of course, it must be the same client number used to identify that client's bill in *BillB5*.

It's not at all complicated. In actual practice you'll use a standardized method of entering client information in *CBase5* first, then in *BBase5*, and finally in *BillB5*. Don't be put off by the notion of client numbers. You never have to memorize or keep track of client numbers, *LOM5* does all that. When you type in the first few letters of a client's last name, the *LOM5* programs immediately begin sifting through the client numbers in order to automatically obtain the one you want. The only time you must pay attention to client numbers 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 *LOM5*, and 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 *LOM5* 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 example bills to see how they're prepared and what they look like in print. 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 summary, to print a bill you simply start *BillB5*, open the Sample.db file, select a bill and press the print button. In fact, if you use *LOM5* 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!

CAVEAT

The Sample file set is comprised of randomly generated data so that you would have full screens of information to look at. With the exception of the three bills that we set up in the Sample.db *BillB5* file, don't expect the *BBase5* data, in particular, to make a lot of sense. In other words, if you look at the *BBase5* data too closely you'll notice payments and categories that probably won't match up. For example, you may find a payment to "Marathon Gas, Inc." categorized as "Filing Fees." Obviously this is wrong. This sort of thing occurs when we take the randomly generated payees and randomly match them up with categories. So, only the three bills we provided in the Sample file will really make sense. Furthermore, if you try to create a fourth bill in the Sample file, you'll need to make sure that there's sensible data in *CBase5* and *BBase5* that match the client number of the bill you're creating in *BillB5*. In normal use of *Law Office Management* this would never be a problem, but using the nonsense-data contained in the Sample files could be problematic.

The Manual

You're not going to want to hear this, but if you want to delve deeper into *LOM5* you absolutely must read the owners manual that is accessible from each program's Help menu. The owners manual can also be found on your hard drive as a pdf file at:

C:\Program Files\OffMgt\CBase5\lom5.pdf.

Two other resources for learning about *LOM5*:

1. **Call us at 330-278-3252**. We can answer most questions quickly and help you avoid wasting your time. Also, give us a call if you think you've found a problem with LOM5. It's a gigantic, new program and it's possible that there may be things we overlooked in getting everything ready for you.

2. For *LOM5* 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 $30 charge. Don't be discouraged by the associated charge. In all instances, users have said **Remote Assistance** saved them countless hours involved in scaling the learning curve and hundreds of dollars in wasted time or computer-technician expenses.