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.

The information you enter into your Daylite database can be quickly searched, retrieved, and updated. In addition, Daylite synchronizes with Address Book and iCal and hence eliminates the need for double entry. If you have any further questions about Daylite, please visit our FAQ page.

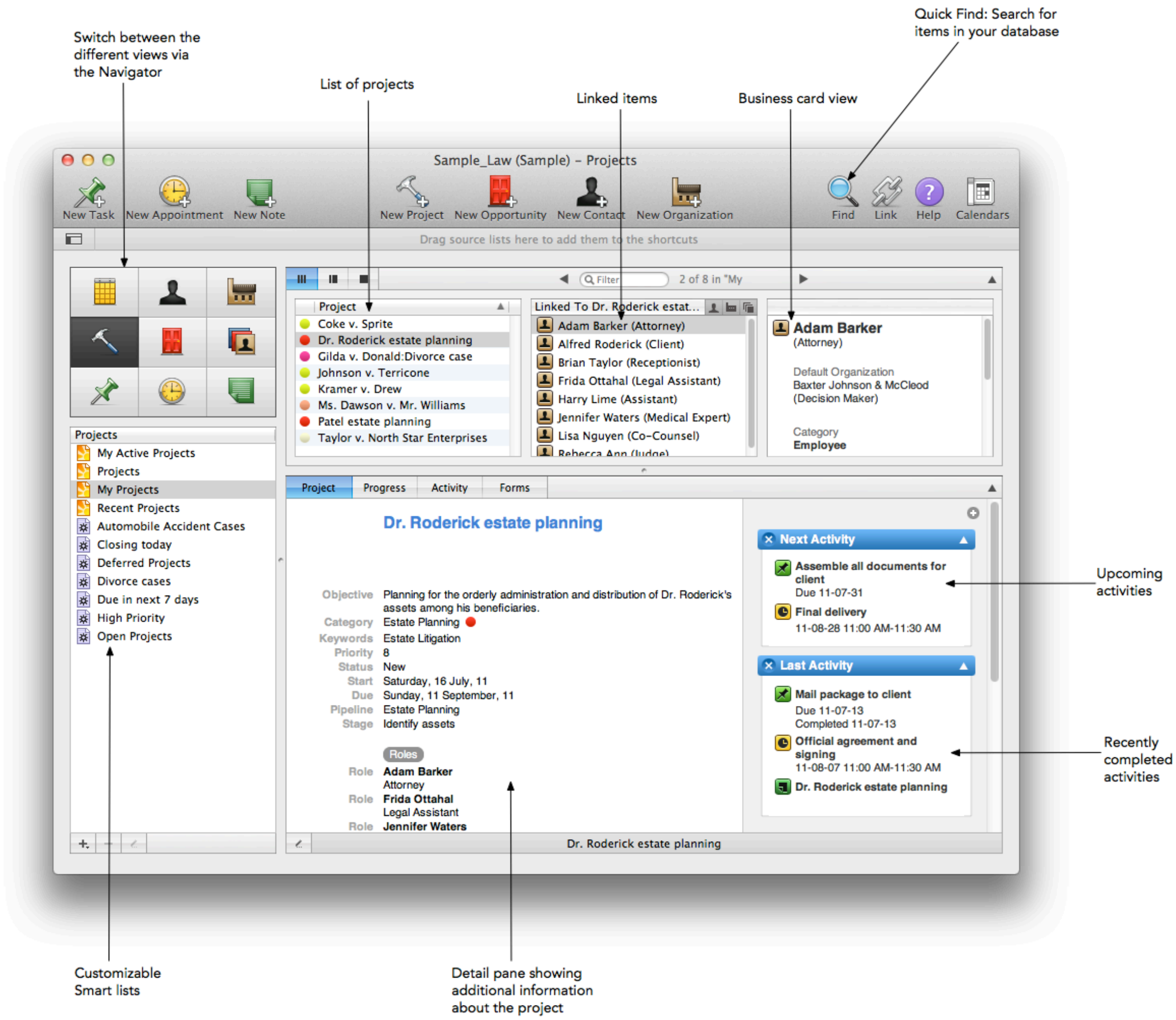
To get started with this template

1. Download a trial version of Daylite and launch it.
   The "Welcome to Daylite" window opens.
2. Click Create a New Database.
3. Enter the details. When you go to step 3, select Law as your template and click Finish.
4. When done, click Log In.

Let us start by taking a look at setting up and organizing projects.

Projects

A project is synonymous with a case or trial. It is the key element at the centre of your law practice. All other items in Daylite have relevance with respect to the project. Here's a quick snapshot of the project window.



The Projects view

Within the project, you can record important pieces of information about your case. You can

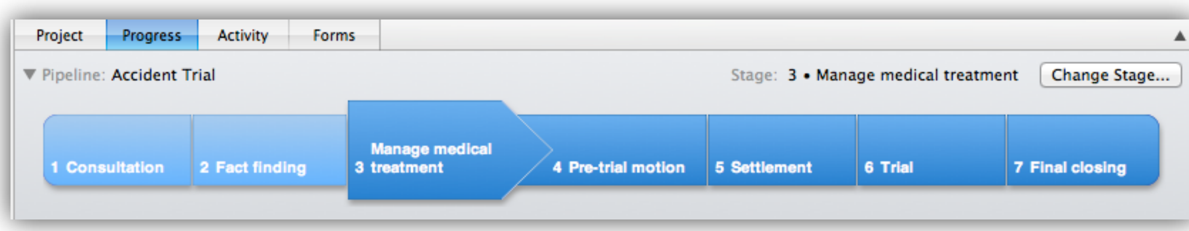
- Link the person you are representing and assign the role "Client." You can also link other people associated with the case and assign them suitable roles (which can be customized in the Roles & Relationships Preferences).
- Use the Status field to record case status.
- Record the Started date, Due date, and Completed date.
- Record the main matter as the Objective.
- Add a pipeline for getting a quick, visual representation.
- Select a Category and assign Keywords for classifying your cases. For example, you could tag your projects with the category "Divorce" and create a Smart list to view all divorce cases in 1 view.

- Set up extra fields to record miscellaneous information—such as, File Number, Court, Division, Docket No etc.
- Set up tasks, appointments, and add notes to the case.
- Add file and web references, and do much more.

The primary advantage is by simply selecting a project (i.e., case), all items that relate to the case, are recorded or are linked to the case giving you rich context and history.

Pipelines enable you to get a quick, visual representation of how a project (or case) is organized. You can quickly gauge which cases are in progress and which ones are close to completion and assess them. 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.



The Pipeline view

You can completely customize how you manage projects by setting up custom pipelines (Daylite > Preferences > Pipelines).

Opportunities

You can use opportunities for tracking potential clients and cases you are hoping to get, or sometimes those that you have refused in the past to reconsider them. Once you get their business, you can simply create a new project from the opportunity that retains all the information and start working on the case.

Categories

Categories are useful for classifying and grouping the items in your database. For example, this template has *Attorney*, *Client*, *Judge*, *Defendant* as contact categories; *Accident*, *Civil trial*, *Corporate* as project categories and many others. You can customize categories in the Classifications pane of Daylite Preferences.

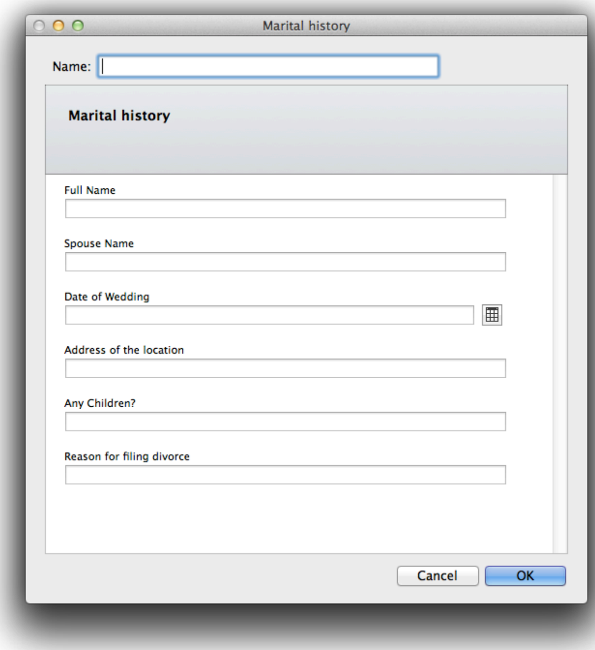
Keywords

Keywords allow detailed classification of contacts, organizations, opportunities, and projects. They can be used to tag these items with **descriptive words or phrases** that will help you find the right data more easily. In this template, you'll find keywords such as:
- *Lawyer*, *Doctor*, *Detective*, *Disability*, etc for contacts
-*Adoption*, *Bankruptcy*, *Children's rights*, *Divorce*, etc for projects
You can customize keywords in the Classifications pane of Daylite Preferences.

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 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.



Adding a new form

You can customize forms by creating forms that ask questions specific to the type of law you are practicing (Daylite > Preferences > Forms & Fields).

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.

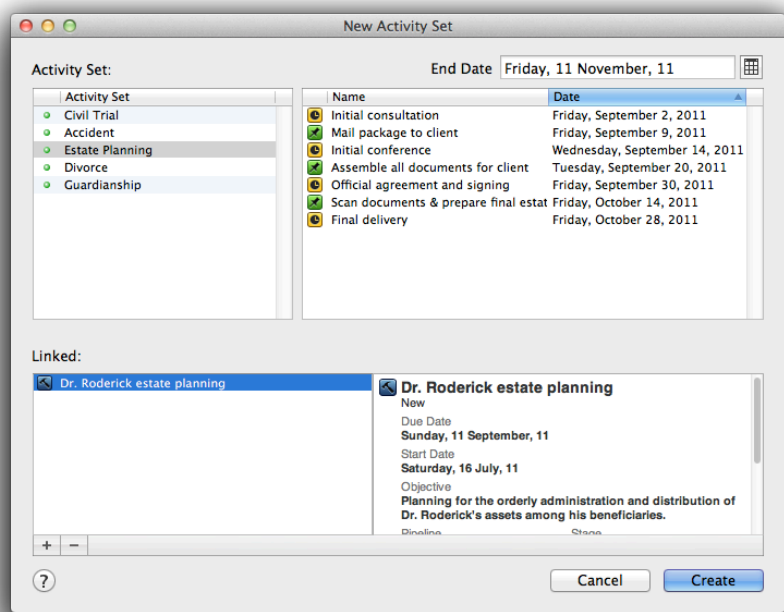
3. **Estate planning:** A series of tasks or time-blocks, ready to be retrieved and applied to an estate planning/estate litigation case.

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.

Using activity sets, you can ensure that you don't miss any critical step in handling your case. Daylite keeps everything organized, so you can focus all your attention on winning your case.



Working with Activity sets

You can set up your own activity sets in the preferences and customize where in Daylite they will be available (Daylite > Preferences > Activity Sets).

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*.

The above steps are also applicable if you are using Billings Pro. Note that for Billings Pro workers are added and managed in Billings Pro Server.

Resources

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

- **Daylite 101 certified training course:** Our certified trainers deliver this course regularly all over North America. To find out more about this course and our trainers, please visit http://www.marketcircle.com/daylite/training/.

- Please visit http://www.marketcircle.com/daylite/lawyers/ to learn more about Daylite for the legal industry, and specifically, how other law firms are using Daylite to manage their practice.

- 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.