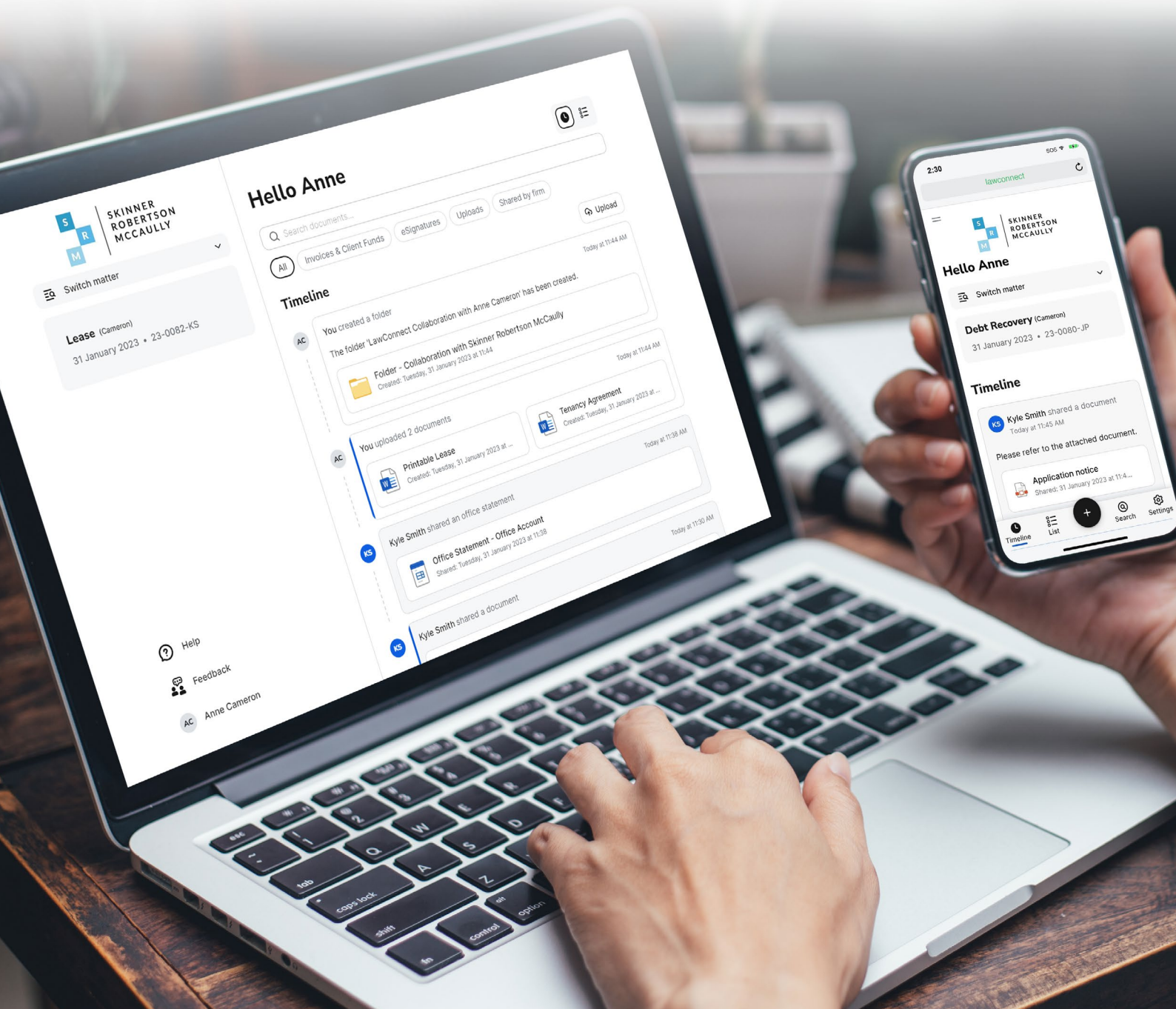




## User Guide

This guide has been designed for you, our clients, to optimise your relationship with our firm. This will streamline the management of your case and enhance communication throughout the process.



# What is LawConnect

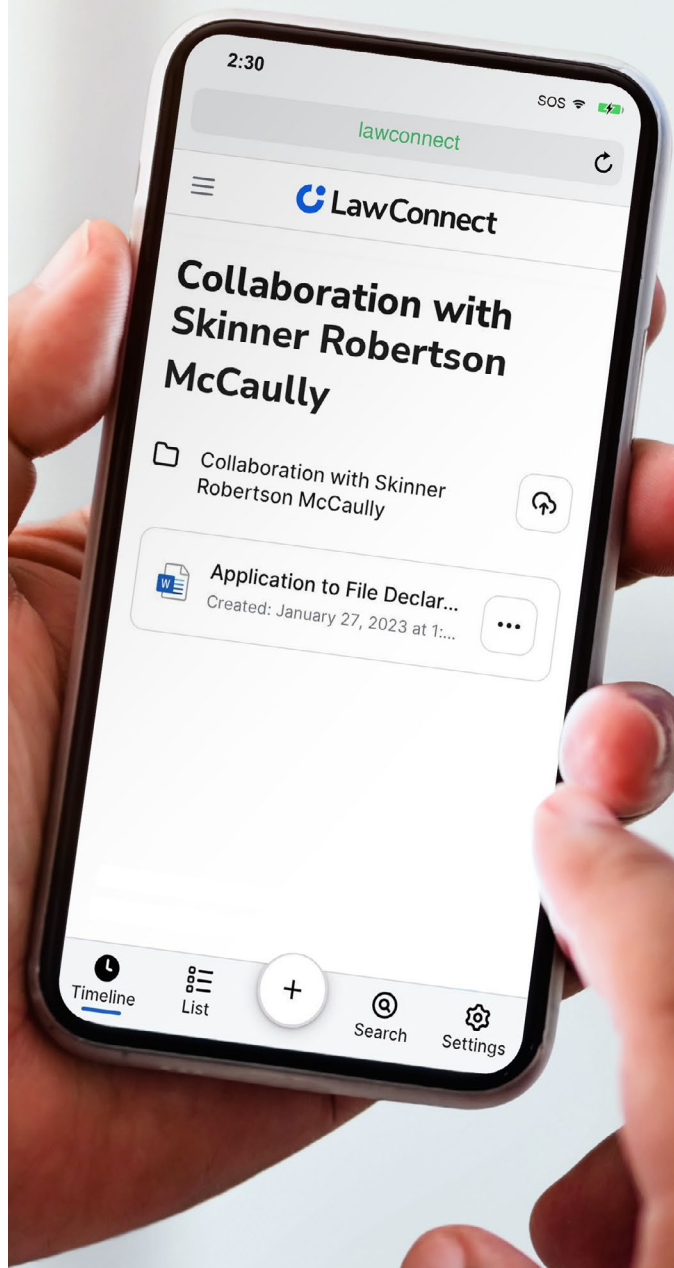
LawConnect is a secure online document sharing and collaboration tool for lawyers and their clients. It is a secure and efficient way to receive, share and privately collaborate on documents with your lawyer from anywhere, at any time.

## Why use LawConnect

- **Secure:** Viewing and sharing documents via LawConnect is safer than email which ensures your confidential documents are not exposed to online scams, phishing, and unwanted prying eyes.
- **Convenient:** LawConnect saves you time and removes the need to visit your lawyer's office allowing you to upload, comment or sign documents online.
- **Accessible:** Benefit from having all your important legal documents securely stored in one place. Easily access client statements, invoices and pay safely and quickly online or via the app with flexible payment options.

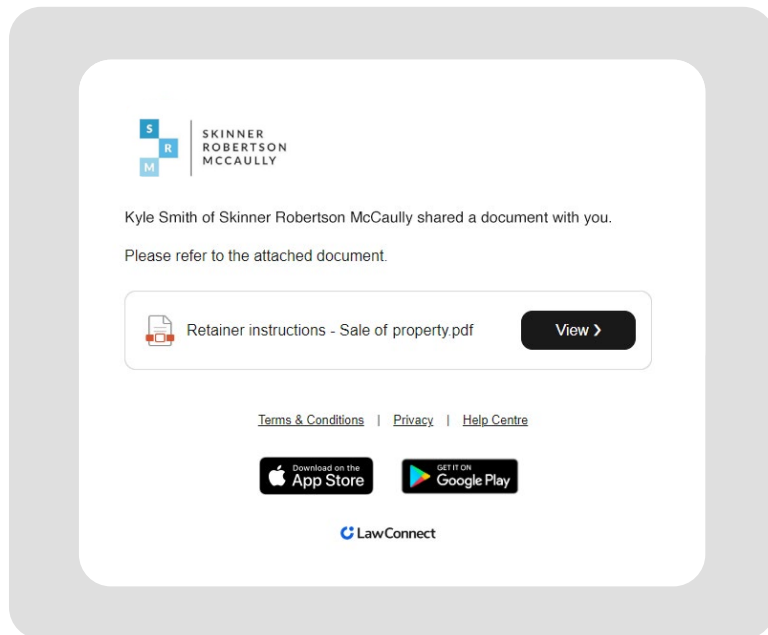
Start conveniently collaborating online with your lawyer today.

- **LawConnect has shared more than 2.5+ million documents online safely and securely**
- **LawConnect has facilitated online collaboration for 9500+ law firms and their clients**



## Accessing LawConnect

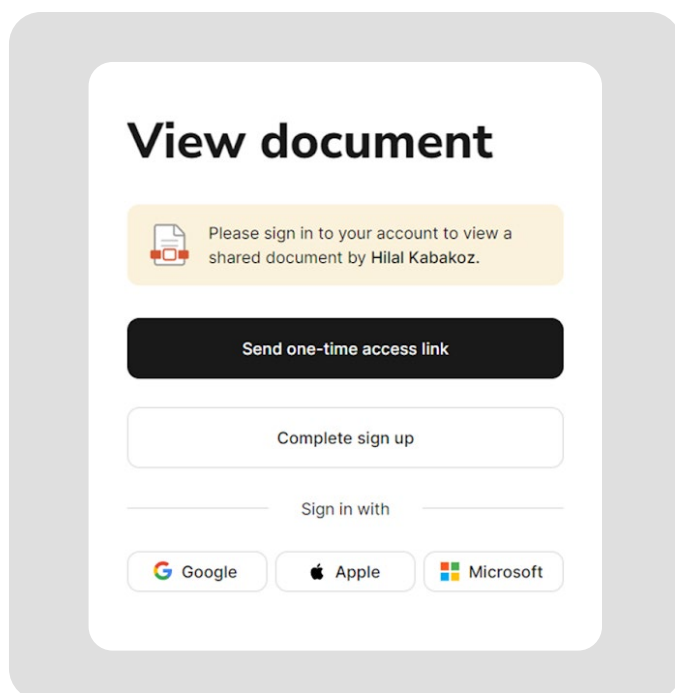
When your lawyer shares a document with you for the first time through LawConnect, you will receive an email invitation. You may also notice it is branded with your lawyer's logo.



## Signing In

If you already have an account, simply log in with your username and password or sign in with the **social sign in options** using your Google, Apple or Microsoft credentials.

If you do not have a LawConnect account you can choose to access documents and items via a one-time access link.



## One-Time Access Link

One-time access link provides an alternative way to view a document or item shared with you without creating an account or entering a password.

To obtain the one-time link:

1. Click the **View** button in the notification email your lawyer has sent you with the shared document/s and a new window will open.
2. Select **Send one-time access link** from the sign in options to view the shared document/s or item/s.
3. You'll receive an email with a one-time access link. Open the email received and click **Sign in to view** shared documents or items.

## Creating an Account

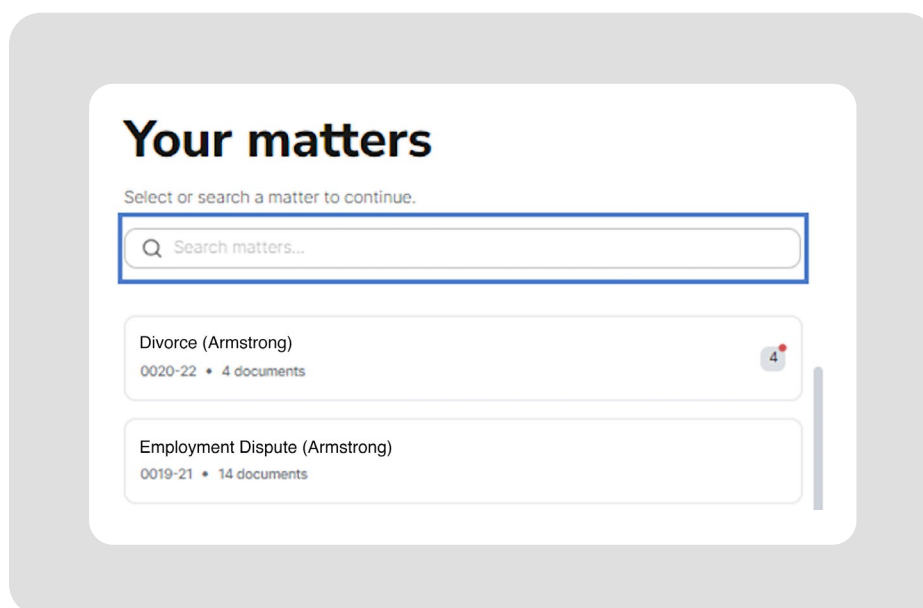
If you'd like to manually create an account, you can do so via the following steps:

1. Click the **View** button in the notification email your lawyer has sent you with the shared document/s and a new window will open.
2. Click **Complete sign up**.
3. Set a password. This new password will be associated with the email address you have been shared a file with.

## Matter/Case List

If you have more than one matter that has files shared via LawConnect, you will be presented with the Matter/Case List after signing in to LawConnect.

The matters are sorted in order of recency. You can select the relevant matter by clicking on a matter in the list or you can use the search bar to quickly filter the list.

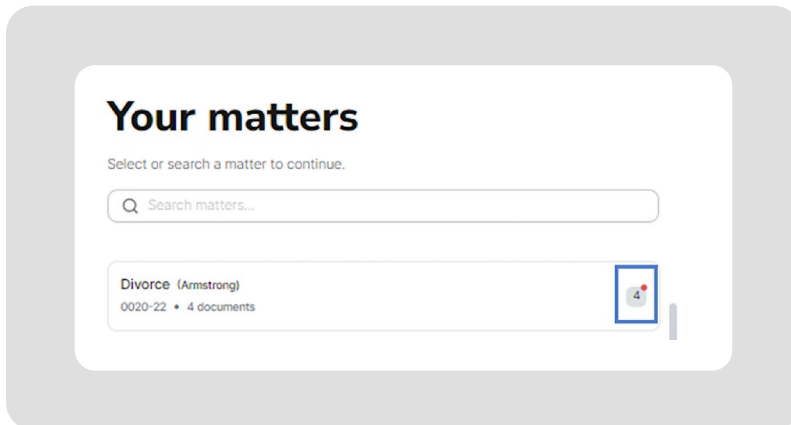


## Notifications

Each time a document or item has been shared with you by your lawyer, you will be notified by email. You can then simply request a one-time access link or log into your LawConnect account to view the document or item.

## Viewing All Correspondence

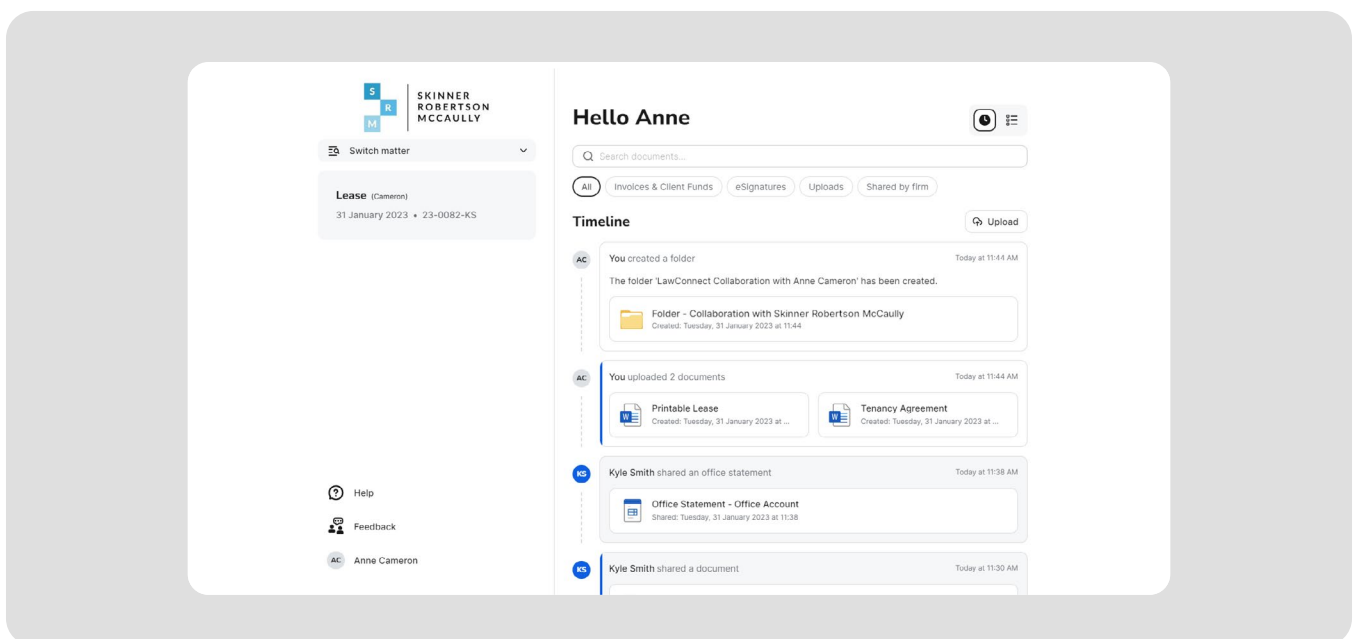
When you are logged into your LawConnect account, matters with recent updates and items that require actioning will have the **notification badge**.



That number signifies the number of outstanding actions you have for that matter. You can click on that matter and check for the latest changes shared and action any outstanding items.

## Timeline View

Once you have selected the relevant matter, the dashboard will show you the timeline view for that matter. This lists every item that has been shared chronologically.



## To Do

Any outstanding items that require an action, including unpaid invoices or forms pending eSignatures, will be pinned at the top of the Timeline view under the **To Do** section. This makes it easy for you to view any outstanding items that require your action.




## Filtering between your documents and items

You can also navigate through the tabs to view documents and items grouped together:


- **Invoices & Client Funds** - all invoices and client statements
- **eSignatures** - all documents and forms requiring signatures and previously signed documents
- **Uploads** - all documents and items uploaded and shared by you
- **Shared by firm** - all documents and items shared by your lawyer, including collaboration folders

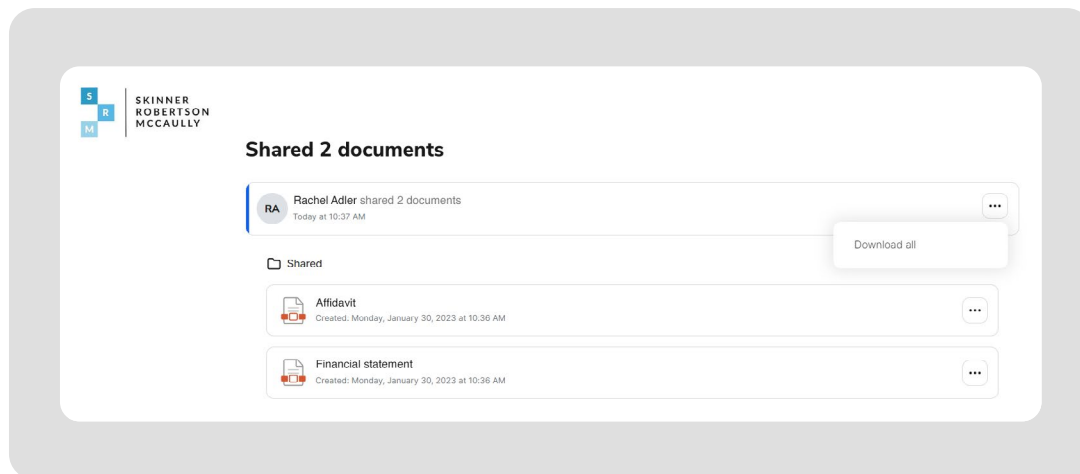
## Viewing Shared Documents & Items

1. To view a document, simply click on it and it will display in a new window.
2. If you'd like to download this document, click  and **select Download**.

## Downloading Multiple Documents & Items


When multiple items or documents have been shared with you, you can download all items in bulk. You must be in the timeline view to **Download all**.

1. To download all, **click on the item with multiple documents in the timeline view list**. This will take you to a new window where you can see the multiple items shared.
2. Click  and **select Download all**. All files will begin downloading.



## Commenting on Documents

Collaborating with your lawyer on documents is easy using the **Comment** function.

1. Click on the document you'd like to comment on.
2. To add a comment, highlight the text you'd like to comment on.
3. Click .
4. Type your comment.
5. Click **Post**.

When the comment has been saved, it will appear in the right panel under **Comments**. Your lawyer's responses will also appear in this right panel, allowing you to have a complete overview of all comments made.

Email notifications are sent to all parties when comments are made.

The screenshot shows a legal form with two main sections: 'Part A About the parties' and 'Part B Acknowledgement'. In 'Part A', there are fields for 'APPLICANT 1' (Family name: Wallace, Given names: Adrian) and 'RESPONDENT 1' (Family name: Wallace, Given names: Gavin W). Below these are fields for 'APPLICANT 2' (Family name: Missing middle name - Luke, Given names: ) and 'RESPONDENT 2' (Family name: , Given names: ). There are 'Cancel' and 'Post' buttons. 'Part B Acknowledgement' has a checkbox and text: 'I, Adrian Wallace have received information from a Family Counsellor or Family Dispute Resolution'.

## Signature Requests

If your lawyer has requested an eSignature from you, you can access this by clicking on **eSignature**.

1. Click the **eSignature** tab.
2. Click **Sign** on the document that requires a signature.
3. The document will open in a new window. You will be prompted where to electronically sign.
4. Sign electronically.

Your lawyer will be notified when the document has been signed by all parties.

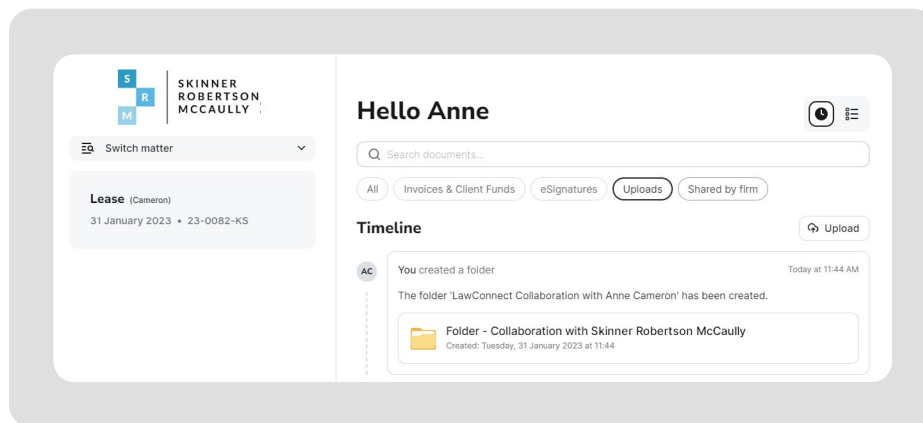
The screenshot shows a legal portal interface. On the left, there's a sidebar with a logo for 'SKINNER ROBERTSON MCCAULLY' and a search bar. Below the search bar, there's a card for 'Employment (Cameron)' dated '31 January 2023' with reference '23-0081-KS'. The main area is titled 'Hello Anne' and has a search bar 'Search documents...'. Below the search bar are tabs: 'All', 'Invoices & Client Funds', 'eSignatures' (selected), 'Uploads', and 'Shared by firm'. Under the 'eSignatures' tab, there's a 'Timeline' section showing a request from 'Kyle Smith' on 'Today at 11:53 AM'. The request is for a document titled 'eSignature - Notice of application - section 9' shared on 'Tuesday, 31 January 2023 at 11:53'. There is a 'Sign' button next to the document.

## Uploading Documents to Share with Your Lawyer

LawConnect is a two-way interaction, meaning you can also share documents with your lawyer through LawConnect.

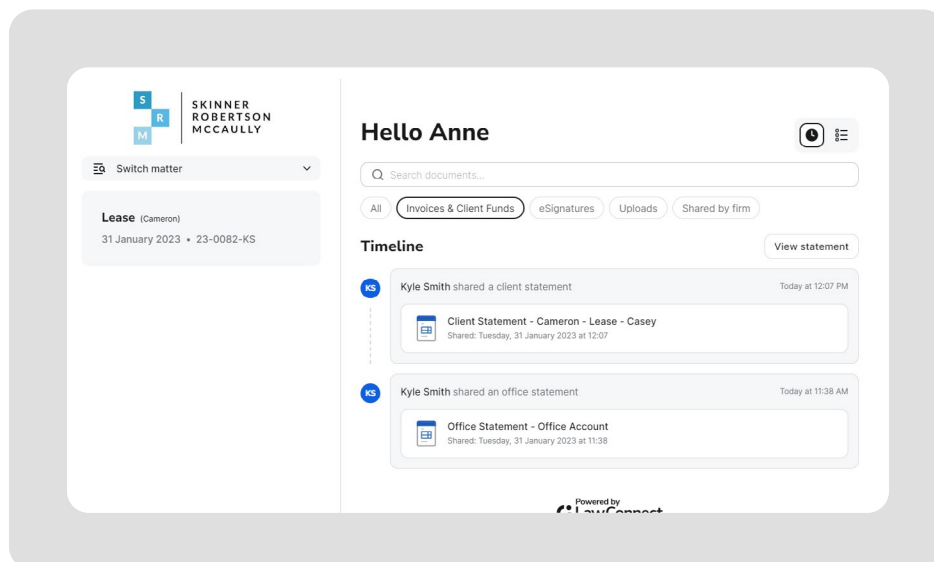
1. Click the **Uploads** tab.
2. Click the **Upload** button to share items directly with your lawyer.
3. Select the document/s or item/s you'd like to upload from your computer and confirm your selection by clicking **Upload**.

Your lawyer will be notified via email that you have shared a document with them.



## Invoices & Client Funds

All invoices and client fund statements will be available for you to view under the **Invoices & Client Funds** tab. You can also see outstanding invoices, giving you the option to pay.



The **View statement** button will take you to the Invoices & Client Funds screen. Here you can select from different accounts shown at the top of the screen.

Depending on the Account type selected, the list of relevant transactions will be displayed, as well as a brief financial summary.

Here you can **Download statements** and **Pay** anything outstanding from this screen.



## Invoices & Client Funds

[DTP Law Practice Client Funds Account](#)[Outstanding invoices](#)[Download statement](#)


## Invoices

If you click on **View statement**, you will be able to view all outstanding invoices, all past invoices and receipts. Here you can pay your outstanding invoice/s or download the statement of account for your records.

### How to pay your invoice/s:

1. Remit payment for an individual invoice by clicking **Pay**. The secure pay window will launch with **Invoice Amount** and **Invoice Number** auto populated.
2. You have the option to edit the invoice amount and make a partial payment.
3. Enter your payment details.
4. Click **Pay Now**. The **Pay** button will change to **Pending** and once approved, your lawyer will receive a notification.

You also have the option to pay the total due for **all outstanding invoices** by clicking on the **Pay in Full** option.

**SKINNER  
ROBERTSON  
MCCAULLY**

**SRM Legal**  
Level 8, 2 Ebor Street  
London E1 6AW  
Tax Invoice No. 190

**Invoice To**  
M Armstrong  
4 9 Arlington Street  
Twickenham  
TW1 3QS

**Date**  
23/01/2023  
**Due Date**  
22/02/2023

**Balance Due**  
**£129.06**

**Matter**  
00145-23 Armstrong, Sale; Anderson

**Staff**  
Person Responsible: Kyle Surname

**Professional Fees**

DATE	TRANSACTION NO.	DESCRIPTION	AMOUNT	GST
23/01/2023	TE25858	Letter to client	£117.33	£11.73
			£117.33	£11.73

Invoice Amount£117.33

Tax£11.73

**Total Amount£129.06**

0+🖨️✕

**Pay by card**More ways to pay

Tax Invoice No.  
**190**

Due Date  
**22/02/2023**

To Pay  
**£129.06**

Payment Amount

£129.06

Card Details

Card Number

Cardholder Name

ExpirationMMYYCVV

Payment Amount:£129.06

Credit Card Surcharge:£0.00

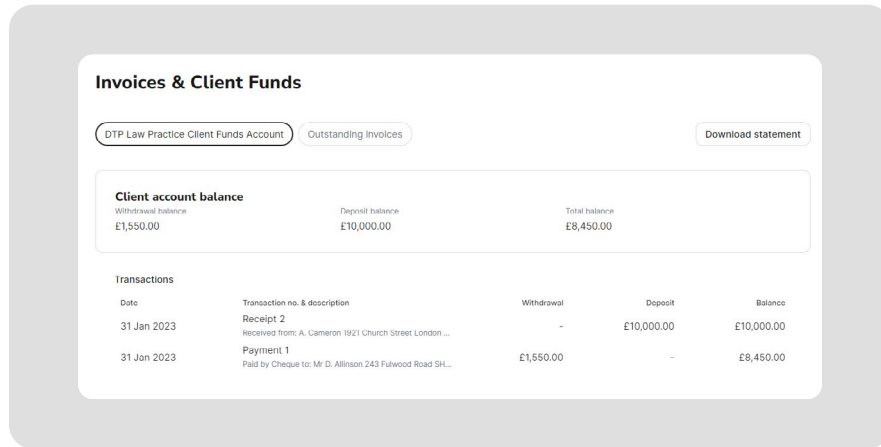
**Total Due:£129.06**

**Pay Now**

## Client Funds

If you click on **View statement** from the Invoices & Client Funds tab, you can view and download your client account statements where money is held on your behalf.

You can view client deposits and withdrawals as your lawyer works through the case. It will show you the current balance, as well as showing the total deposited, anticipated deposits and withdrawn.



The screenshot shows the 'Invoices & Client Funds' section. It includes tabs for 'DTP Law Practice Client Funds Account' and 'Outstanding Invoices', with a 'Download statement' button. Below this is a 'Client account balance' summary table and a 'Transactions' table.

Client account balance				
Withdrawal balance	Deposit balance	Total balance		
£1,550.00	£10,000.00	£8,450.00		

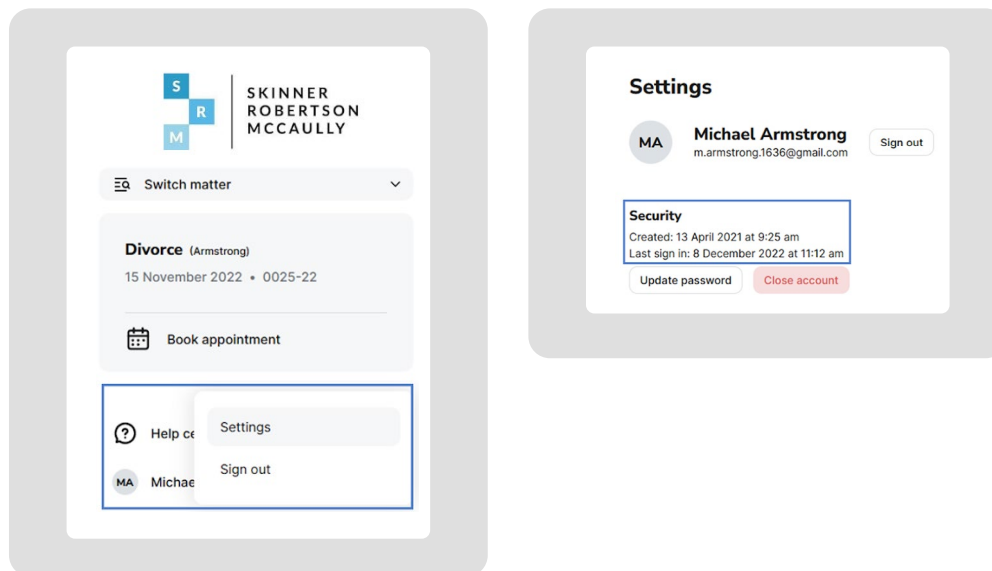
  

Transactions				
Date	Transaction no. & description	Withdrawal	Deposit	Balance
31 Jan 2023	Receipt 2 Received from: A. Cameron 1921 Church Street London ...	-	£10,000.00	£10,000.00
31 Jan 2023	Payment 1 Paid by Cheque to: Mr D. Allinson 243 Fulwood Road SHL...	£1,550.00	-	£8,450.00

## Accessing your LawConnect Account Settings

To access your account settings, simply click your name at the bottom of the screen when you are logged in.

For added security, you will be able to see the date the account was created and the last time it was accessed. Here you also have the option to update your password.



## Closing your LawConnect account

You have the ability to close your LawConnect account. Closing your account **permanently deletes the account and file data** from LawConnect and signs out of LawConnect on all devices.

When the LawConnect account is deleted:

- Uploaded files will be deleted from LawConnect servers.
- Files shared by the user's lawyer will be revoked.
- Lawyers the user has interacted with will be notified of the account deletion by email.

## LawConnect Mobile App

Available on iOS and Android devices, the LawConnect app allows you to access all the usual LawConnect features in an easy-to-use mobile app. Search for LawConnect in your app store and download today.

## Support

If you have further queries, visit the [LawConnect Help Centre](#) for more information.