



---

## How To Manual

---

# Contents

- 1. Introduction..... 3**
- 2. The Computer System ..... 3**
  - 2.1 Accessing the Computer System ..... 3
  - 2.2 Shared S Drive ..... 3
- 3. The Case Management System (“CMS”)..... 4**
  - 3.1 Insight Legal Introduction ..... 4
  - 3.2 Insight Home Screen ..... 4
  - 3.3 The Top Navigation Bar ..... 5
  - 3.4 The Sub Navigation Bar ..... 6
  - 3.5 How to view clients or matters:..... 5
  - 3.6 How to view all active matters and search through..... 5
  - 3.7 How to open a New File: ..... 5
  - 3.8 Recording Time on Insight ..... 6
  - 3.9 The Timesheet ..... 6
  - 3.10 Automatic Time Recording ..... 6
  - 3.11 Creating and Producing Documents on Insight ..... 6
  - 3.12 The Client Ledger ..... 6
  - 3.13 Billing on Insight..... 6
  - 3.14 Task List ..... 7
- 4. Accounts and Billing ..... 9**
  - 4.1 Raising a bill request..... 9
  - 4.2 Raising a disbursement request/ cheque .....10
  - 4.3 Paying monies: .....11
- 5. Filing .....11**
  - 5.1 Insight .....11
  - 5.2 Hard Copy .....12
  - 5.3 S Drive .....12
- 6. Ai Firm Style .....12**
  - 6.1 General .....12
  - 6.2 Letters and Emails: .....12
- 7. Client Care .....13**
  - 7.1 New Client .....13
  - 7.2 New Instruction .....14
- 8. Insight User Fields .....14**
- 9. Notes screen .....15**

10. Ledger reporting .....	16
11. How To Send An Email On Behalf Of Other People In Outlook .....	17
12. Email Templates.....	18
13. Saving an email Template .....	20
14. Using a Template .....	20
15. Filing an Email.....	22
16. Property status tool .....	23

## 1. Introduction

This How To Manual is designed to help you and teach you about the processes and firm style used at Ai Law. We encourage you to be resourceful and bring your own style to how you work, although you should use best endeavors to comply with the firm style and our procedures in order to make advising our clients as efficient as possible.

## 2. The Computer System

### 2.1 Accessing the Computer System

Our computer network is hosted. This means that you can access your computer from any desktop and any location. You will have been given your username and password already. To access your computer:

(i) On Windows:

Search for “Remote Desktop” on your desktop taskbar and follow the login instructions that have been given to you.

(ii) On Mac:

Download the “Microsoft Remote Desktop” application, open it and then follow the login instructions that have been given to you.

### 2.2 Shared S Drive: The shared S drive is where internal documents, precedents and billing information is kept. The S drive is made up of two parts:

(a) Ai Share file drive

(i) Ai Staff Centre This section is for Ai staff and contains internal documents, such as How To Guides, handbooks and any other handouts that may be given.

(ii) Billing This section is for filing bills in month order. These bills are created in the Case Management System (“CMS”) and are also saved here.

- (iii) *Client Care* This section contains the documents and templates necessary to open a new client file or matter.
- (iv) *Departmental Master Files* This section contains documents for certain departments that cannot easily be filed on the CMS into any one matter file or may be needed on a regular basis. For example, the “Wills” department file contains template emails and questionnaires for sending on new instructions; and the “Property” department file contains a folder for each different development and templates for property matters.
- (v) *Document Templates* This section contains firm style templates for common documents that you may need.
- (vi) *Precedent Bank* This section contains precedent legal documents filed within their legal area. You may add precedents to the Precedent Bank where there is anything missing and you have a precedent document.

(b) Insight

This folder is where the client documents stored on the CMS are kept. They can be accessed from here or the CMS. See below.

### 3. The Case Management System (“CMS”)

#### 3.1 Insight Legal Introduction

We use Insight Legal as our CMS. This CMS is used for opening and closing files; recording time; producing matter files and documents; storing information; accounts; and billing. To access CMS click the icon on your desktop. Your username and password has been given to you. There are specific Insight How To Guides located in the *Ai Staff Centre, How To Guides*.

#### 3.2 Insight Home Screen

- (a) Upon logging in you will see the home screen. The default home screen shows:
  - (i) Your daily time (which will automatically appear if you have recorded any time for that day);
  - (ii) Your recent matters;
  - (iii) Pending Posting and Posting Requests; and
  - (iv) A settings taskbar. Here you can select what you want to show on your homepage. It is possible to show bill posting requests and every window on the homepage can be moved to your liking.

- 3.3 The Top Navigation Bar: There is a navigation bar at the top of the screen, which show the different parts of the CMS: *Cases, Accounts, Reporting* and *System*. What you have access to will depend upon your user privileges.
- 3.4 The Sub Navigation Bar: When you click a tab on the Top Navigation Bar, the relevant icons for that part of the CMS will be showcased underneath the Top Navigation Bar.
- 3.5 How to view clients or matters: The clients and matters are accessible in the *Cases* section. Click *Case Enquiry* to look up a file. You can search the client, matter or reference in the *Matter Lookup* search bar. This will list the results by “Client” and by “Matter” in the two panes directly underneath. Select the client/matter you want to see by clicking on it once. The client/matter details will then be showcased on the main screen where you can see the information, account information and client ledger.
- 3.6 How to view all active matters and search through: Click “*Active Matters*”. This is an alternative method to Case Enquiry and you can filter your matter search by status, fee earner, type.
- 3.7 How to open a New File:

There are two parts to opening a new file: 1) Inputting the new client contact details; and 2) inputting the new matter.

(a) Adding a new client:

- (i) On the Sub Navigation Bar, there are 3 icons in a section called *Maintenance*. Click on “Client”. A new page will appear with the client details. Click “Add”. You then go through each pane on the page and fill in the required details.
- (ii) Every time you input a new client or new matter you must do a conflict check. To do this, right click in the middle of the “Conflict Check” pane and press “Add”. You will be given a list of options to search against. Right click again on the right side of the pain and click “Run Search”. This will then show any conflicts or similar clients and addresses.
- (iii) Click save on the Sub Navigation Bar. The icon for “Add Matter” will now become available.

(b) Adding a new matter:

- (i) Click on “Add Matter”. If the client is already created, you can simply select “Matters” on the Maintenance section and add it for the client you want.
- (ii) Fill in the details as necessary.
- (iii) On the “Matter Clients” pane, you can find the client and assign them to the Matter.

- (iv) You must include a fee earner. To do this, right click on the bottom pane and select “Add”. You then input the fee earner’s status in the drop down menu and the users name. You can include more than one fee earner, or a fee earner, supervisor, client.

3.8 Recording Time on Insight: There are two ways to record time. Either:

- (a) Go into the particular client matter and click on “Record Time” from the Sub Navigation Bar. You should then input the relevant detail. You can upload documents and it will be automatically assigned to the matter file; or
- (b) On your home screen Click the “Time Recorder” icon on the Sub Navigation Bar. You can then start recording and include the matter details so that it automatically assigns to that case file.

3.9 The Timesheet: At any time you can click on your timesheet on the Sub Navigation Bar. This shows all of the ongoing unassigned time. You can easily assign the time to the files you want at the end of each day.

3.10 Automatic Time Recording: The CMS will automatically record time when you do certain actions on a case matter. For example, if you click the “email” tab next to a client’s name when you are viewing the client or if you click on a template document in the “document producer”, the time recorder will automatically begin.

3.11 Creating and Producing Documents on Insight: In Insight it is possible to create prepopulated documents automatically. When on the client matter file you want to create a document for, access the “Document Production” tab. Here you will see a list of available documents. The documents that appear will depend on the matter type you are in (for example a litigation matter type will show different available documents to a property matter type). By clicking on the document you want Insight will automatically create and open the document and begin your time recorder. Insight will pull in the required information that has been inputted on the client/matter file, therefore the more information you input when you open a new client/matter, the better Document Production will work.

3.12 The Client Ledger: The client and office ledger can be seen for a matter when you select the matter by clicking the *ledger* tab at the bottom. You can also click the *financial* tab on the left hand pane to see a snapshot of the client ledger and bills.

3.13 Billing on Insight: Insight is designed to ensure that there are no errors in posting, therefore it has a front-end case worker part and a back-end accountant part. If you need to raise a bill, make a payment or raise a disbursement, you should make a *Bill Request* or *Posting Request* accordingly. That requested bill or disbursement will then appear on the ledger, however will show as a *pending* status. The accountant will receive the request and either

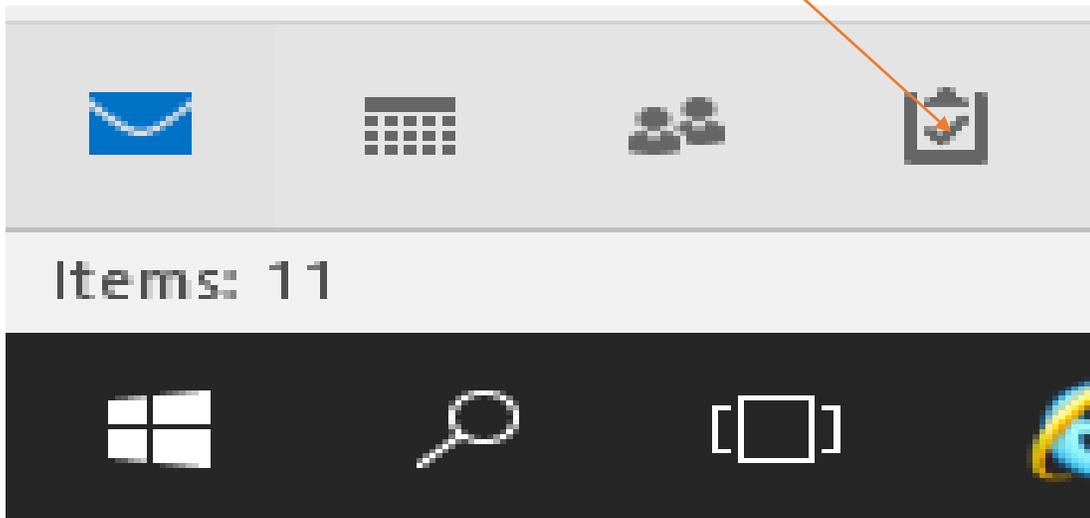
accept or decline it. The requested bill or disbursement will then either show on the ledger as posted, or be declined.

You will be able to see your requested bills and disbursements at any time on your home page.

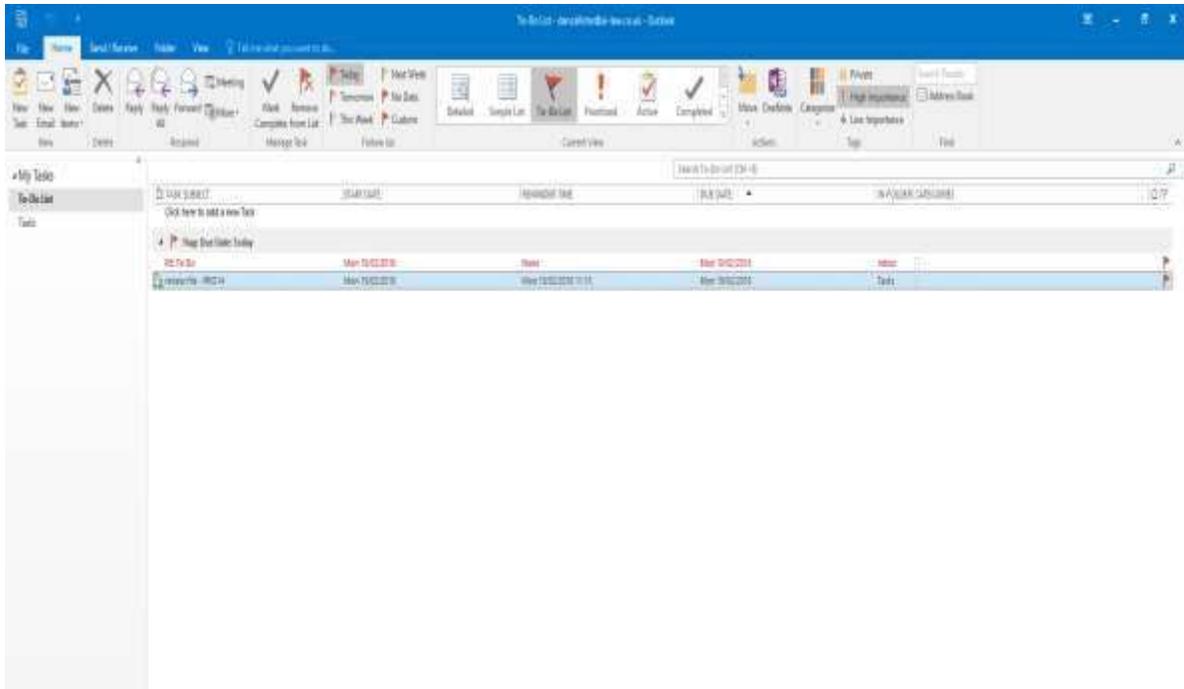
### 3.14 Task List

There is a way to create tasks for yourself on outlook, these will prompt you to deal with deadlines and also flash up reminders for you to complete the required tasks, these tasks can also be sent to other people and will appear in their task list, please see below a quick guide on creating these tasks.

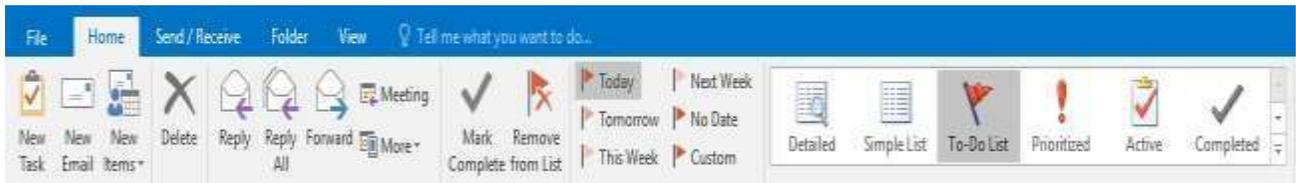
Your Task list can be found on Outlook at the rear of the page;



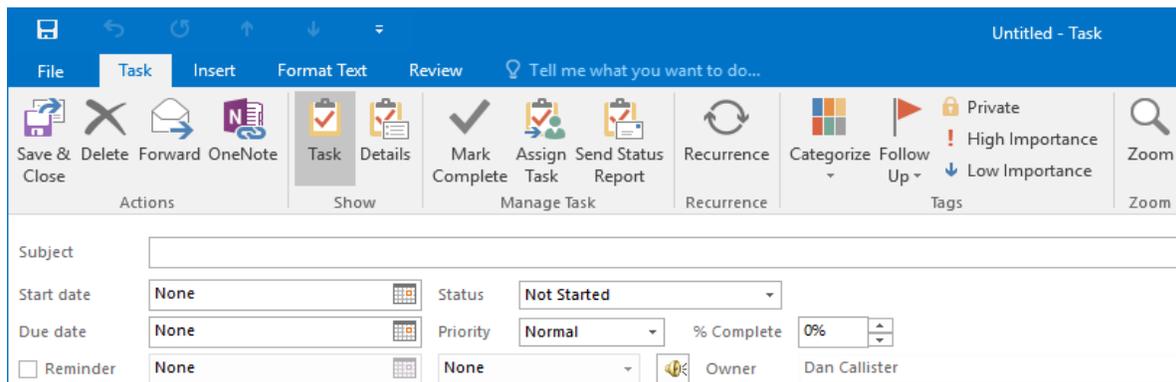
Once you click this you will be taken to the below page; from this you can view any flagged emails which need attention in your inbox and any tasks to complete for yourself or that has been set by someone else.



When on this screen use the toolbar at the top, from this you can prioritise tasks in your list complete and remove tasks and set date for a task to be completed by.



To create a new task, Press the New Task button, the below window will appear:



From this screen you can set a task for yourself, in the subject box you note what the task is, set a start date for the tasks and also when it needs to be completed by, the reminders will flash up on your outlook to remind you of a deadline or the need to complete that task.

### **Assigning a task to another person**



Press the Assign task button to send a task to someone, the same as the above with the dates and reminders, an email box will show also, this is who you would like to send the task to. Once sent, the task will be emailed to the specific person and appear in their task list, you will get a notification once this task is received and completed.

This will help keep up to date on deadlines and help keep files up to date to avoid fines and streamline the service we provide.

## **4. Accounts and Billing**

The accounts are handled in a different part of Insight. To raise a bill, disbursement or payment for a client matter file, you must request it. Once you have requested it, the payment will be sent to the accounts side for actioning. The accountant can then post, modify or decline the request. You should not send invoices to clients before the request has been posted to avoid discrepancies. Instructions on making requests are below. You can monitor the status of your requests on your homepage.

### **4.1 Raising a bill request:**

When you want to bill a client matter go to the client matter you want and select *Bill Request* on the Navigation Bar. You will be taken to the *Request Bill* tab. Here you will fill in the information for your bill. The *Request Bill* tab has 6 sections where it asks for information:

- (i) *Details:* Here you input the details of the bill such as costs, VAT and description. If you select the VAT rate it will prepopulate VAT automatically.
- (ii) *Time:* Here you select what time from your time recording sheet you are billing. By clicking *Auto Time Select* it will select all time and allocate a proportion of the total bill to that time. If you are billing for a certain period, you will want to select all time for that period so that the time after this period is still showing on the system as WIP to be included in a future bill.

- (iii) *Disbursements*: Here you select any disbursements on the file. If there are no disbursements recorded nothing will show up here. In order to add a disbursement that you have not yet posted, you need to first raise a disbursement (see below).
- (iv) *Allocations*: Here you allocate the costs to the fee earners.
- (v) *Document*: Here you create the bill. Click the *Ai Bill* and then select the client. The bill will be created automatically and should open. You should then file this in the usual way. If the matter has more than one client, you have the option to tick the individual client's names which will create a bill for each client, or you can click *Combined Client* to create one bill for all clients together.
- (vi) *Summary*

When complete click *Submit*. The Bill will be requested on the accounts side and the status will appear on the *Bills* tab of the client matter as either *Pending*, *Posted* or *declined*. You should only send the bill to the client once it has been posted by the accountant.

#### 4.2 Raising a disbursement request/ cheque:

If a payment is to be made out of office or client, you can make a *Posting Request*. To do this, go to the particular client matter file and click on *Posting Request* on the Navigation Bar. You are then able to request one of the following three options:

- (a) *Client Cheque*: This is when you are making a payment on behalf of the client that is not a disbursement, such as refunding money on account to a client or paying a completion balance to the other side.
- (b) *Client Disbursement*: This is when you are making an outlay on behalf of the client for third party services such as a court fee, or Land Registry fee. Before requesting a client disbursement you should ensure there are sufficient funds to cover the disbursement costs as the client account can never be overdrawn.

*NB*: VAT outlay cannot be claimed out of the Client account. Where a disbursement attracts VAT that VAT must be passed onto the client inclusive. If the VAT is payable by Ai Law, then the VAT element must be paid from the office account.

- (c) *Office Disbursement*: This is where you are making an outlay on behalf of the client for third party services such as a court fee or Land Registry fee, but there is not sufficient funds available on the client account or it has been agreed that such disbursements shall be paid out of the office account.

- 4.3 Paying monies: If you wish to pay money, you should email [tme@ai-law.co.uk](mailto:tme@ai-law.co.uk) with instructions for payment. This payment instruction should coincide with your request (see *Raising a disbursement request/ cheque*).

## 5. Filing

Filing can be done on Insight, S Drive and by hard copy. The extent of filing on each should be as follows:

- 5.1 Insight: All client documents and matter files should be filed on the particular client's matter. To view the matter files, select the *Matter Files* tab at the bottom. There you can see a list of all files on that matter. If you hover your mouse over them, if in a readable format (such as .msg files), a snapshot of the file will appear for quick reading. When in the *Matter Files* tab there is a search bar to search a particular file and a folder icon in the right hand corner. Clicking the folder icon will bring up the folder of client documents, which is automatically saved by Insight into the S Drive.

(a) Adding files to Insight:

- (i) Adding files to a matter through the folder window: You can drag and drop files into the folder window as usual and any documents will automatically appear in the Insight *Matter Files* tab and folder.
- (ii) Adding files to a matter through outlook or other application: You can send emails, attachments or other types of files stored in different parts of your computer to Insight automatically. To do this, right click on the email, file or folder that you want to send and select *Send to Insight*. This will bring up a box to search for the matter. Once you have selected the matter click attach all and the document will automatically be added to the Insight matter file.

- (b) Organising files on Insight: As a matter can have a lot of files, it is good practice to organise the files as efficiently as possible. The files in the *Matter Files* tab will show up as a list. By clicking on the folder tab and opening up the folder window, you can create folders for organizing the file. These folders will then show on the *Matter Files* tab. The folders may depend on the matter type, although recommended folders as a minimum include:

- (i) *Client Care* (for engagement and terms of business)
- (ii) *Accounts* (for bills and disbursement invoices)
- (iii) *Correspondence* (for emails and letters)
- (iv) *Documents* (for client documents specific to the matter)

## 5.2 Hard Copy

If it is necessary to print matter files or you hold original documents, a physical paper file can be opened. It is not always necessary to open a physical paper file. If you do open a physical file, you should place a file note on Insight so that people in the future can know that there is a physical file in addition to the Insight file.

## 5.3 S Drive

The S Drive is not for individual client filing. However, there may be general files to do with a certain matter or group of matters that cannot be filed into any one client file. These documents should be saved to the *Departmental Master Files* folder in the *Ai Sharedrive*. For example, templates in respect of a certain area or bulk instruction.

## 6. **Ai Firm Style**

This section sets out the firm style and formatting rules that apply to documents drafted for Ai Law. When drafting and sending documents from Ai Law you should try to adhere to these styles and formatting rules as closely as possible to ensure that Ai Law documents are on a uniform basis.

### 6.1 General:

<b>Font</b>	Use Calibri (body)
<b>Font Formatting</b>	Use Single Lines with "Point 12 After". To format the text you can highlight the text, then right-click and go to "Paragraph".
<b>Font Size (body of document)</b>	You should seek to use font size "12" throughout the body of the document.
<b>E-Signatures</b>	Sign your name or firm name accordingly using the font "Freestyle" in font size "22" in a blue colour:  <i>Fee Earner Name / Ai Law</i>

### 6.2 Letters and Emails:

<b>Font</b>	Use Calibri (body)
<b>Font Formatting</b>	Use Single Lines with "Point 12 After". To format the text you can highlight the text, then right-click and go to "Paragraph".

<b>Font Size (body of document)</b>	You should seek to use font size “12” throughout the body of the document.
<b>Font Size (letter)</b>	For the address box, the address should be size “12”, the reference headings should be font “10” in bold and italics, and the reference information should be font “11”. You should use size “12” for the body of the letter as normal.
<b>Letter Signatures</b>	<p>Yours [sincerely / faithfully]</p> <p><i>[Fee Earner Name / Ai Law]</i></p> <p>[Fee Earner Name]</p> <p><b>[Position]</b></p> <p><b><u>Ai Law</u></b></p> <p><u>[Encs.]</u></p> <p>- If you are posting a letter, you should sign in wet ink. If you are emailing it, you may sign it as above, using the font “Freestyle” in size “22” in a blue colour.</p>
<b>Spacing</b>	There should be 3 lines from the top of the page to the start of the address panel. There should be 3 lines from the bottom of the address panel to the start of the letter. This can be altered if necessary for formatting purposes.

## 7. Client Care

### 7.1 New Client

For a new client, you need to obtain the client ID records and information required for inputting in Insight. If the client is to send funds, you should also obtain the appropriate source of funds information for anti-money laundering purposes.

ID documents to be provided should be as a minimum a photo ID and proof of address by way of utility or council tax bill, or stamped bank statement that shows the client’s name and address.

Source of funds forms to be provided should be as a minimum the completed source of funds form, 3 months’ bank statements and any appropriate supporting evidence.

Where you meet the client face to face, you should take copies of any original source of funds documents. If you do not meet the client face to face, you should request source of

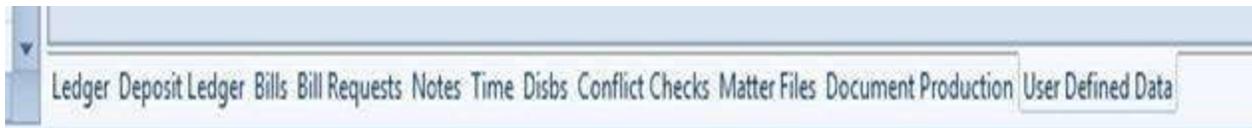
funds and ID documents to be certified with scanned certified copies to be sent by email and originals to follow by post.

7.2 New Instruction:

For any new instruction you should provide the client with an engagement letter and Ai Law's standard Terms of Business. The engagement letter templates and the Terms of Business are saved on the S Drive and on Insight's *Document Production*. If being sent electronically, the engagement letter should be sent in PDF format on email letterhead.

8. **Insight User Fields**

We have now added new user defined data onto insight, these are located at the bottom of an active matter,



These fields can now be populated when working on your cases and the data can be generated into letters and emails, if left blank there will be no data (please note we are working on merging the letters)

This all means in the future going forward Insight will populate the details for you when using document production.

Please find the new user defined fields below for property and for disputes:

Dispute resolution:

A screenshot of the 'User Defined Data' form for 'Litigation'. The form is titled 'User Defined Data' and has a sub-header 'Litigation'. It contains several input fields for case information: Case Number, Judge, Court, Court address 1-4, Claimant, Claimant address 1-4, Defendant, Defendant address 1-3, and Defendant address 4. The fields are arranged in a vertical list on the left side, with 'Defendant address 4' being a separate field on the right side. The form is set against a light blue background.

## Property

The screenshot shows a software interface titled 'User Defined Data' with a 'Property Fields' tab. The form contains various input fields for property information, organized into two columns. The left column includes fields for Title Number of properties, Local Authority, Purchase Price, Evidence for Registration, Exchange date (dropdown), Completion Date (dropdown), Name of Seller, Seller Solicitor, Seller Solicitor Address 1-4, Lender Name, Lenders Address 1-3. The right column includes Lenders Address 4, Lenders Solicitor Name, Lenders Solicitor Address 1-4, SDLT Amount, and SDLT Notes (with a dropdown set to 'Y'). A navigation bar at the bottom lists: Ledger, Deposit Ledger, Bills, Bill Requests, Notes, Time Disbs, Conflict Checks, Matter Files, Document Production, and User Defined Data.

It is important for these fields to be filled in as will be a good reference tool for queries or anyone else viewing your file will be able to provide updated information and this process will also make document production less time consuming.

### 9. Notes screen

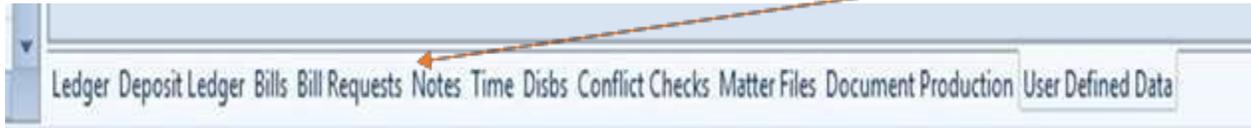
Just a reminder you can add notes onto insight, this will come in useful when needing to remind yourself to do anything on the case and if anyone else looks they will know where the case is up to, you can also leave phone notes on this page so there is reference to the call for the file handler to review.

For Note select Cases > Maintenance > Matter.

Search for the matter the note relates too, when opened select Add Note at the top of the tool bar:



Once typed up will date the note and also reference who made the call will appear. You can find the file notes on the bottom on the screen.



## 10. Ledger reports

You can view your ledger and see how much unbilled/Billed time there is on a case.

Open a case you wish to view and press print at the top of the screen:



At the top now you have some options to tick, if you want the report to include time, matter details, ledger etc you can include any billed and unbilled if want too, time recording drop down needs to be fee earner and activity, and choose your date range,

Press Run when ready and you will get the report:

The screenshot shows the 'insight' software interface. At the top, there are tabs for 'Reporting' and 'System'. Below the tabs, there are various filters and options, including 'Include Fees', 'Include Ledger', 'Include Anticipated Disbursements', 'Include Confirmed Check', 'Display Detailed Ledger Entries', 'Include Paid Disbursements', 'Include Bill Disbursements', 'Fee Earning & Activity', 'Date Range', and 'Run'. The main area displays 'Case Details' for 'LORD - Corneione (Birth Exit) Adoption & Paternity Services' with a date range from 01/01/1990 to 02/01/2018. Below the case details, there are two tables: 'Ledger Card' and 'Time Recording'.

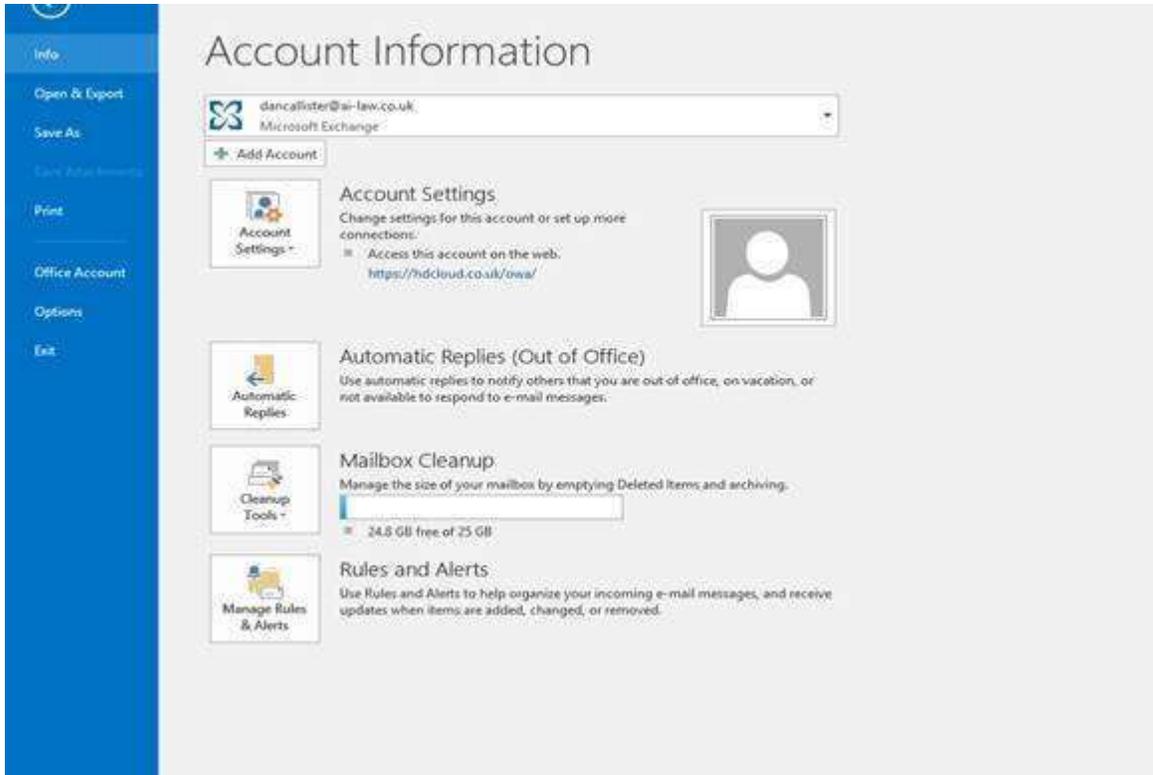
Ledger Card		Office			Client			Deposit			
Date	Ref	Description	Debit	Credit	Balance	Debit	Credit	Balance	Debit	Credit	Balance
01/01/07	040203	Year closed out on account		2,024.44	4,420.00						
01/02/07	040203	Transfer on account from closed out ledger	5,624.44		8,258.44						
01/02/07	040203	on account Fee charged		15.74	8,274.18						
01/02/07	1001	38 Cancelled Commissions re Offset		5,887.90	2,386.28						
01/02/07	1001	38 Cancelled 0470 Commissions re Offset		753.24	1,633.04						
01/02/07	1008	Litigation 021502 38 Commissions re Offset		3,338.70	(1,704.70)						
01/02/07	100102	on account	11.74		1,716.44						
01/02/07	100102	on account			1,716.44	11.74		1,728.18			

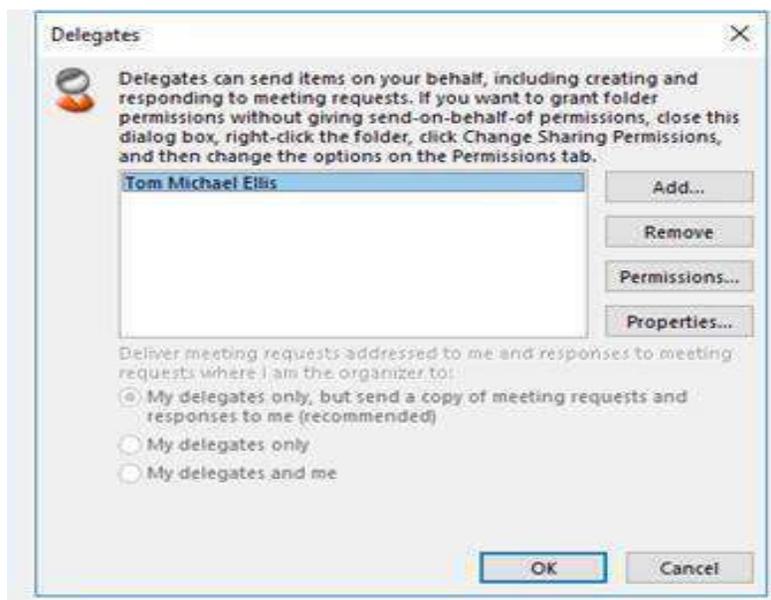
Time Recording											
Date	Activity	Fee Earner	Description	Minutes	Units	Value	Outstanding	Total Time	WPI	Billed	Written Off
01/11/07	886	W Fee Eln	Attending meeting	40	0	2,360.00	2,360.00	2,360.00	2,360.00		
01/11/07	800	W Fee Eln	Shed out mtg	24	6	354.00	354.00	2,714.00	2,714.00		
01/11/07	868	W Fee Eln	Preval Of Documents	30	1	147.00	147.00	2,861.00	2,861.00		
01/11/07	800	W Fee Eln	Shed Out	5	1	177.00	177.00	3,038.00	3,038.00		
01/11/07	869	W Fee Eln	Learning and Labing documents from client re support to Offset	46	0	236.00	236.00	3,274.00	3,274.00		
01/11/07	856	W Fee Eln	Shed in	5	1	26.50	26.50	3,300.50	3,300.50		
01/11/07	800	W Fee Eln	Shed Out	5	1	26.50	26.50	3,327.00	3,327.00		
01/02/07	869	W Fee Eln	Preval Of Documents	30	1	147.00	147.00	3,474.00	3,474.00		
01/02/07	800	W Fee Eln	Shed Out	30	1	147.00	147.00	3,621.00	3,621.00		
01/02/07	800	W Fee Eln	Shed Out	12	2	59.00	59.00	3,680.00	3,680.00		
01/02/07	1170	W Fee Eln	Considerable note	200	0	265.00	265.00	4,215.00	4,215.00		
01/02/07	869	W Fee Eln	Preval Of Documents considering	30	1	147.00	147.00	4,362.00	4,362.00		
01/02/07	800	W Fee Eln	Shed Out re client re 2	12	2	59.00	59.00	4,421.00	4,421.00		
01/02/07	781	W Fee Eln	Telephone Call for	5	1	26.50	26.50	4,447.50	4,447.50		

## 11. How To Send An Email On Behalf Of Other People In Outlook

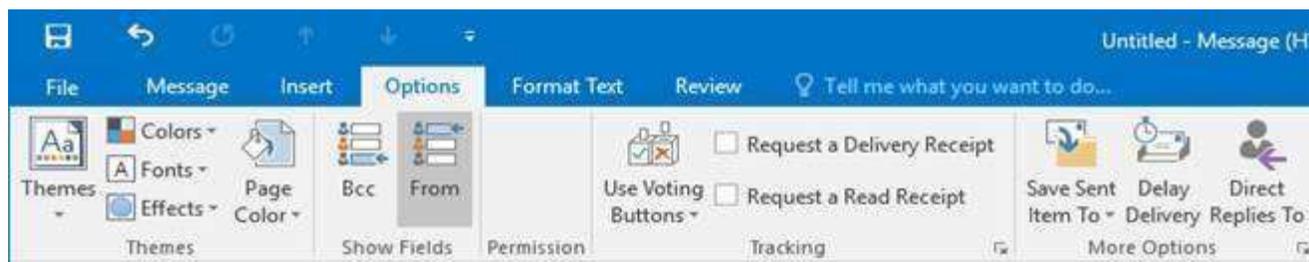
To start Click account settings and then delegate access



From the delegates screen press “add” and add in the email you want, select permissions and choose what you would like the delegate access to, maybe in your absence if you are on holiday.



Once permission is granted and all set create a new message by clicking New Email icon. On the message editor window, go to options and select "From"



After this from the drop down choose who you wish to send the message from, if select other will bring up the address book,

Once this is selected you will see the email in the "from" box changes, you can then send your emails from that specific person.

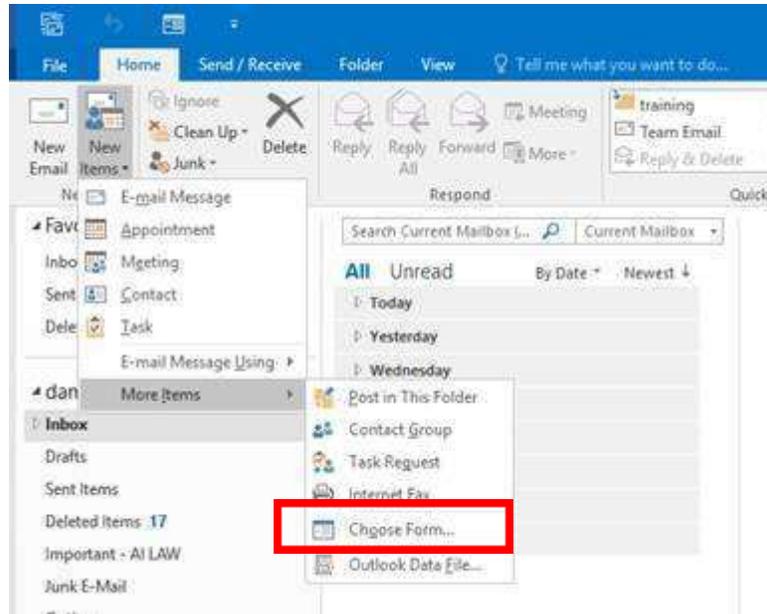
If you choose the "Bcc option", it will secretly copy people in to the email also. This is a good tool to have, you can also set the "direct replies to" tab and will send reply from the sent email straight to the specified person. There is also a tool were if you draft and send email it will only send at the specified date, for example if you chose to send it in 2 weeks will save it and send it the, this is done through the delay delivery tab.

## 12. Email Templates

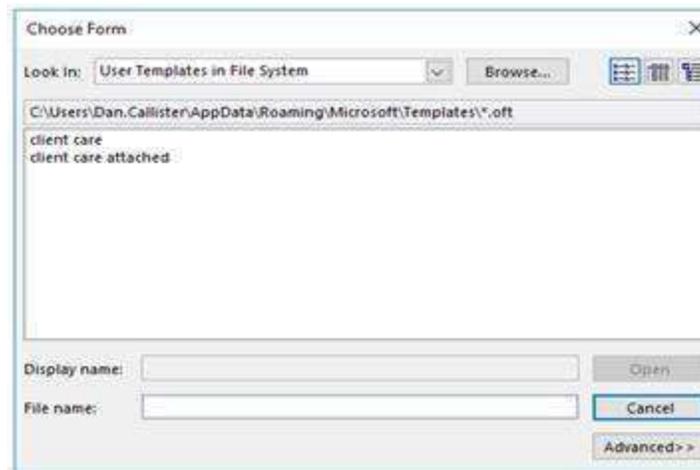
On Outlook you can save templates for emails instead of writing the same email over again, once pressed that email will pop up and be ready to send, you can also attach documents to the template which will always be attached to that particular email template when chosen.

To start press the Home tab > New Items > More Items > Click New Form ( first time right click this and press "Add to quick access toolbar" This will appear at the Top of the screen in the blue bar)



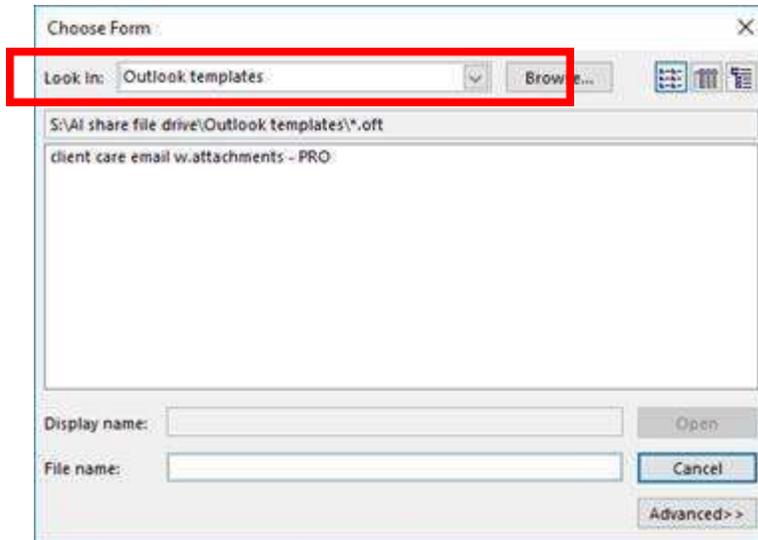


When pressed you will get a screen that looks like the one below, you will need to choose from the drop down “User templates in file System” as part of the set up.



After this is selected you will need to Click Browse.. once this is done press the locate the share drive found through This PC > data (\\localhost) (S:) > AI Share file > Right click the Outlook templates folder and press “pin to quick access”

Once this is set up select Outlook Templates can be selected from the drop down and it is here were you will find your templates in the future. The first step is complete.



### 13. Saving an email Template

To save an email template all you have to do is open a new email, draft up what you want the email to say for example a generic client care covering email, if want to add attachments such as terms of business you also do this here as the attachments will be saved to the template.

Once finished you need to save it, go to file > Save as > save as type > select Outlook template (important or will not save as unless selected) > Name the letter and save it into the outlook template folder located on the share drive.

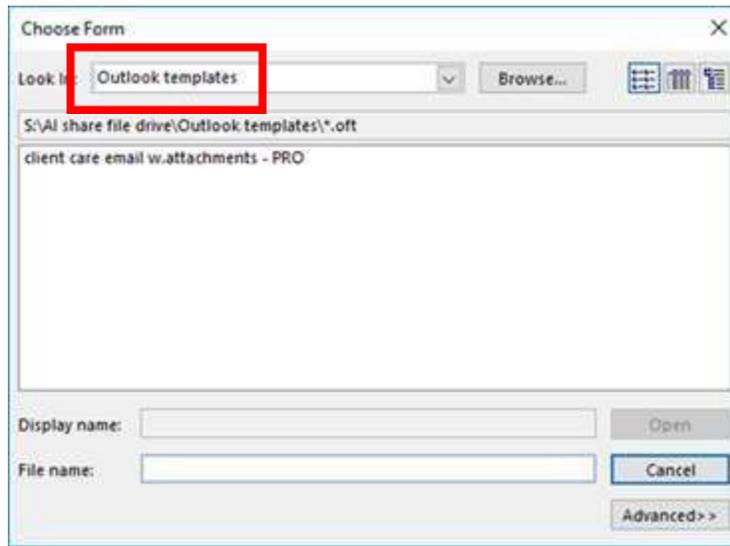
Once saved your template will be available to use for everyone.

### 14. Using a Template

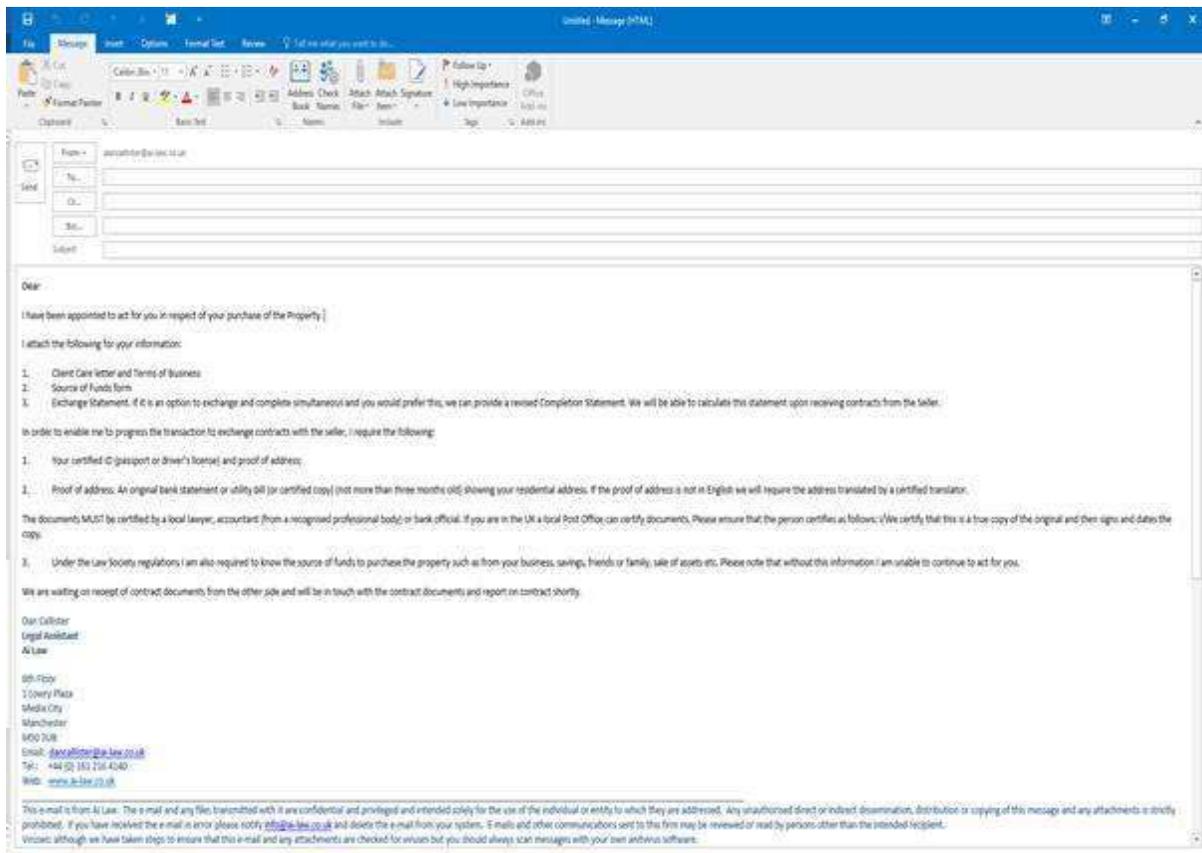
Now all the above steps are complete to use a template press the choose form button:



From the Drop down select Outlook templates:



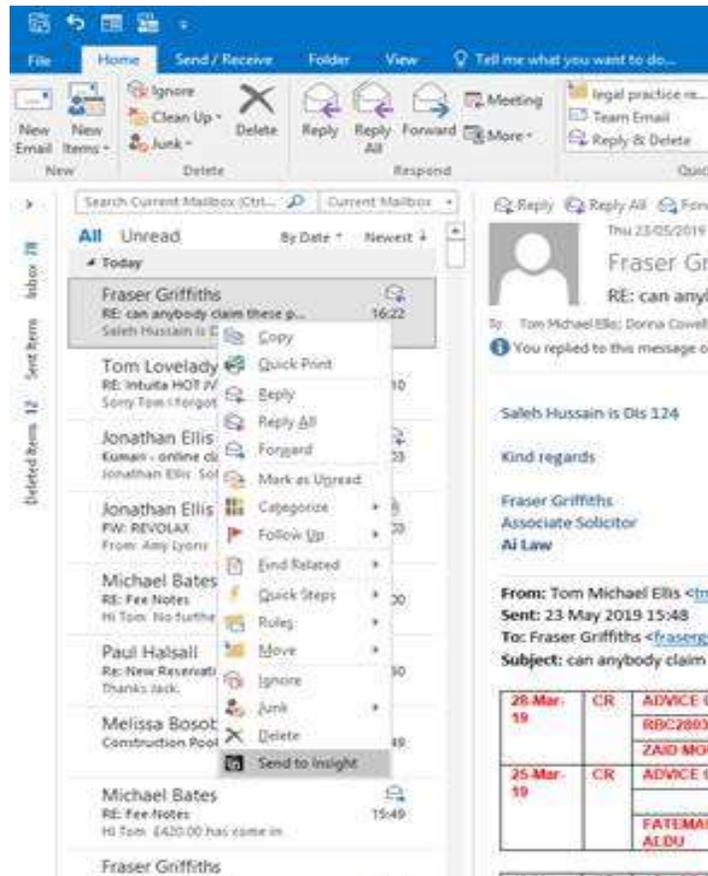
As you can see your template that you made is here, double click this and your email will appear ready to send (this will also include attachments if saved on template):



The templates can be edited by accessing them in the share drive and saving them.

## 15. Filing an Email

Right click the email you would like to file on insight and select the option “Send to Insight”



When this is selected a Dialogue box will appear asking to attach a file. Type in the File reference and click the attachment in the dialogue box (note you can click “send to insight” on more than one file at the same time and attach them altogether or one by one through the dialogue box). At this point you will be able to select whether to save it to file, which folder to save it to, or create a new folder to save it too. Click attach and it will be automatically filed.



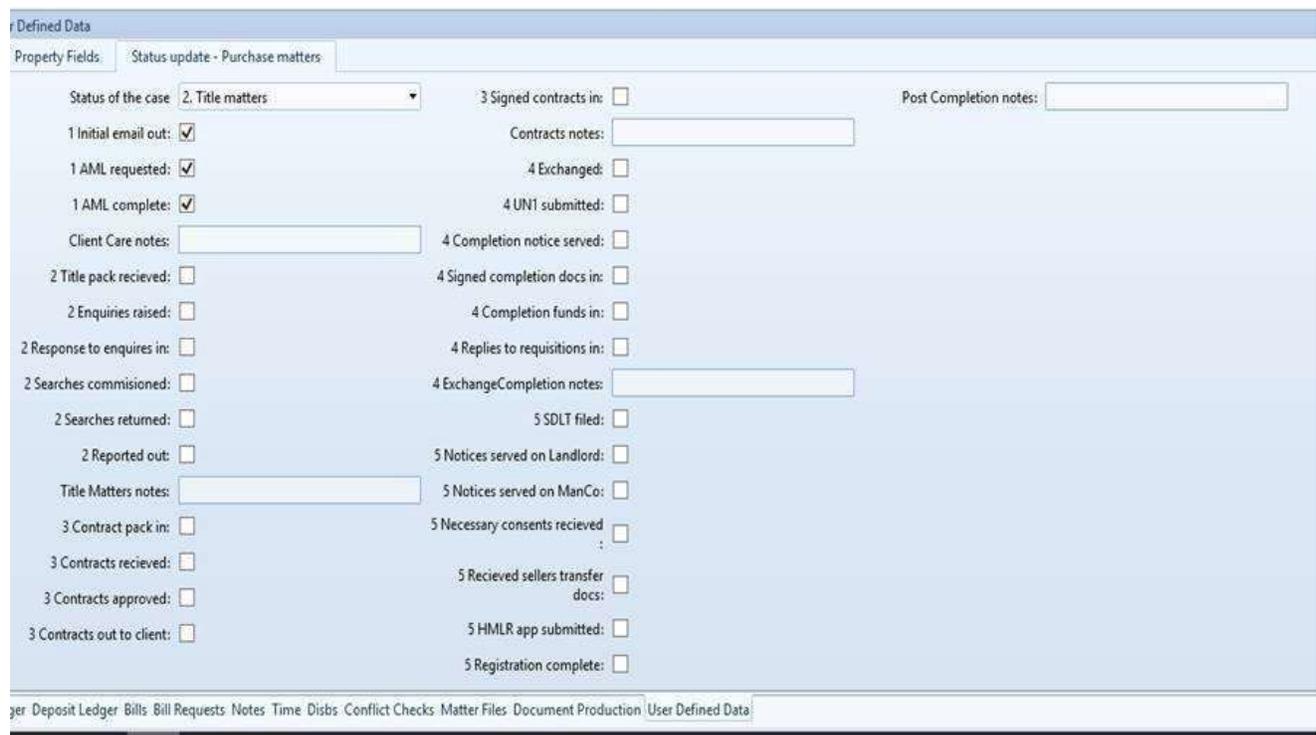
## 16. Property status tool

We have Created a new tool on insight which will let you know the status on each property case and were the case is presently up to.

To access the tool, you will need to be in a property case, under user defined fields select the “status update – purchase matters”.



Once press the screen will look like this:

The screenshot displays the "User Defined Data" form for the "Status update - Purchase matters" category. At the top, there is a dropdown menu for "Status of the case" currently set to "2. Title matters". Below this, the form is organized into two columns of tasks, each with a checkbox and a corresponding text field for notes. The left column includes tasks such as "1 Initial email out:", "1 AML requested:", "1 AML complete:", "2 Title pack received:", "2 Enquiries raised:", "2 Response to enquires in:", "2 Searches commissioned:", "2 Searches returned:", "2 Reported out:", "3 Contract pack in:", "3 Contracts received:", "3 Contracts approved:", and "3 Contracts out to client:". The right column includes tasks such as "3 Signed contracts in:", "4 Exchanged:", "4 UN1 submitted:", "4 Completion notice served:", "4 Signed completion docs in:", "4 Completion funds in:", "4 Replies to requisitions in:", "4 ExchangeCompletion notes:", "5 SDLT filed:", "5 Notices served on Landlord:", "5 Notices served on ManCo:", "5 Necessary consents recieved", "5 Recieved sellers transfer docs:", "5 HMLR app submitted:", and "5 Registration complete:". A "Post Completion notes:" field is located at the top right. At the bottom of the form, there is a navigation bar with various menu items: "yer Deposit Ledger Bills Bill Requests Notes Time Disbs Conflict Checks Matter Files Document Production User Defined Data".

The status of the case at the top of the list will need changing, this is so when we run a report these will appear and we can then identify if a case will need working on to move it along, the tick list is a prompt for the user so they can simply tick when completed, this will also be a reminder of what there is still left to do and also if someone else picks up a case they will also be able to see where it is at, when the case is finished all boxes should be ticked.