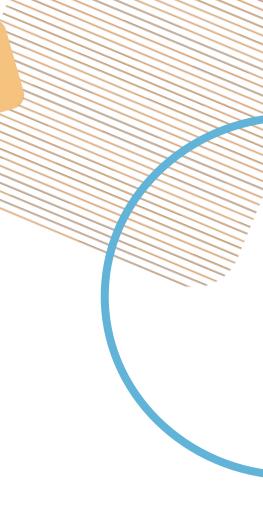


New Year, New Features Webinar

New and Upcoming features in Soluno



Agenda

- 1. Overview / State of the Nation
- 2. New Features in 2022
- 3. New Integrations
- 4. Things you don't know that you don't know
- 5. Sneak Peek into the Future

Presenters



Michael Luciuk

Soluno Sr Product Manager

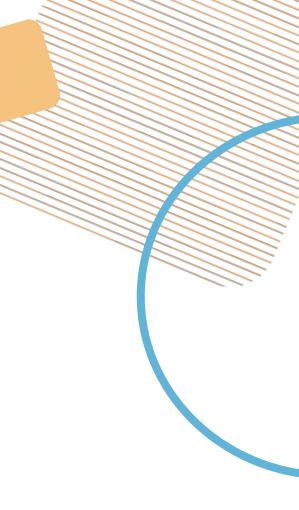


Deborah Schaefer

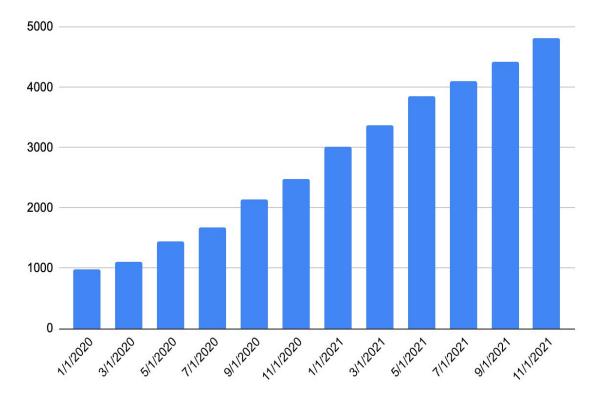
Certified Accountant and Consultant

State of the Nation

Growth can be Painful



The Good



The Challenge



We Have Made Changes in 2022

- 1. Doubled Staff
- 2. Full Management Team
- 3. 4X'd development team
- 4. Introduced Streamlined Development Process
- 5. Dedicated Resources for New Features and Issues

Product Roadmap Themes

- 1. Scaling for Growth
- 2. Accounting Parity (60% to 80%)
- 3. Integrating in Law Practice Management Features
- 4. Keeping our Commitments

New Features from 2022

Closing Files and Contacts

10

Banking <u>Contact</u> Receivables Pay	ables Other						
Contacts Ledger All contacts	All co		s ago 🌔 Export to: 🕅 🕄 🔎 🕌 2022-06-27	114	A sf		
Contact File File Desc	Gabe's De	AOP Resp Lead Assg Rate Source	Open Date		Smythe, Joan	ciuk@gmail.cc	
1 Dudeson, Guy 1 Fake St Toronto, Ontario A1A 1A2		bank GGC GGC GGC standard	2022-02-17 @ 1		Search Closed Files		
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Toronto, Ontario A1A 1A1 Total Files: 0 a002 Madeupski, Fake Total Files: 0		Close File					
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	Case File refe						
	Referral Source No Referral	Close Date					
Report Selections:	Total	July 15, 2021					
Completed : June 27, 2022 4:29 A Requested By : Gabe Chlarelli IncludeCilents : true IncludeVendors : true	М	n File Location					
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Additional	I Contacts						
Save Cancel	Close File	Once a file is closed it is are able to re-open a file		, and reports	s, but transactions are still r	eflected in your financial statements	. You
		Ok Cancel					
2022 © MyCase, Inc. Conf	îdential.	- Additional Communic	ation Methods				

Close File - Requirements

Files can only be closed if there is no:

- 1. Unbilled expenses. (Unbilled Disbursements/Expenses)
- 2. General retainer balance. A closed file matter cannot have a general retainer balance. (File with Unbilled Operating Balance)
- 3. Unbilled fees in an open GL period (This is optional based on the system setting)
- 4. Remaining trust funds. (Bank balance of all clients is 0)
- 5. The contact on a file (or each contact within a group for split billing) must not have a trust balance.
- 6. A/R balance. An archived matter cannot have an outstanding A/R balance. (any unpaid invoice)
- The last entry on the file must be in a closed GL Period (Times/Fees must be before the last closed date)



Close File Report

Banking Contact Receivables Payables Other Contacts Ledger All contacts Generated 4 - 24 hours ago 🌔 Export to: 🛛 🕄 🔀 All contacts 2022-06-27 Gabe's Debug Firm Contact File File Desc AOP Resp Lead Assg Rate Source **Open Date** Dudeson, Guy 3 1 Fake St Toronto, Ontario A1A 1A2 1 bank GGC GGC GGC standard 2022-02-17 📝 🏛 Total Files: 1 8 a001 Fellow, Imaginary Total Files: 0 Guyson, Dude 3 Z 2 Fake St Toronto, Ontario A1A 1A1 Total Files: 0 a002 Madeupski, Fake 3 Total Files: 0 Contact referral Summary **Referral Source** Count No Referral 4 Total 4 Case File referral Summary **Referral Source** Count No Referral Total 1 Report Selections: Completed : June 27, 2022 4:29 AM Requested By : Gabe Chiarelli IncludeClients : true IncludeVendors : true

Multiple Email Address on Contact for Billing

Now can use Contact to cc functionality or this

Туре	Number	Description	
Billing Email	michael.luciuk@soluno.legal		
Billing Email	michael.luciuk2@soluno.legal		



Accepting Retainer with Outstanding Balances

Time/	Fees	Expenses	Operating	In Operati	ng Out Paya	ble Bato	ch Pay Payables	Trust In	Trust C	Dut Transfer)		
Bank Acco o1	ount	Date Sep 6, 2022	Amount \$ 5,100.	Source 00 Client F	GS Payment	ST/HST 0.00	Type Cheque	Originatir	ng Bank	Orig. Cheque #	Receipt # ob-418		nk Ba 98,5
Projected \$898,536													
Contact	-	Received Fr	om										
100		Credit Card											
						4							
File		Client	AR Balance	Invoice #	Retainer Only	Act Code	Explanation				Amo	ount	GL
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100.00 %		\$213,738,78		\$17,249,74	\$29,233,93	\$29.638.62		\$30.137.90	\$273.110.61						Receivable Summary Billed Area of Prace
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		Ac	P by Collecting Sum	mary - Counselin	g & Alan Tuback				
	Billed	Paid	Outstanding	<= 30	31-60	61-90	91-120	> 120	Percent
GST/HST	169.00		169.00					169.00	0.99
Costs - Hard	200.00		200.00					200.00	5.72
Costs - Soft	500.00		500.00					500.00	7.24
Fees	800.00		800.00					800.00	0.61
Total	\$1,669.00	\$0.00	\$1,669.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,669.00	1.04%



Receivable Footer Report -

_RECEIVABLESUMMARYBILLEDAREAOFLAW
 _RECEIVABLESUMMARYBILLEDAREAOFLAW

Reports

Contact Report -> Unbilled by Interest (expenseint)

Entry Sort Order Entry Date->Entry Number	
Entry Date->Entry Number	
Simple Interest on charges	
Yearly Rate	
0.00	
Use Today's date (unchecked = use end date)	

					100 1000 00 1000		
Unbilled E	Expenses with Interest			Gene	erated less than 1	5 minutes ago ≬	🌒 Export to: 🔀 🕄 🛃 🛃
	Unbilled Expenses with Interest Soluno Law Firm (Accrual) All Dates						2023-01-27
Client							
File	Description						Resp
Date	Info	Acc	Ref	Hard	Soft	Int	Total
Entry	Explanation						
10	ABC Law Firm						ľ
10-1	This is the file description						DLP
Details				0.05	0.00	0.04	0.40
				2.65	3.00	0.81	6.46
1 1-1 2020-07-24	Bartlett, John John Bartlett - House purchase - 123 Main Street HELD - EXP				1.00	0.28	DD 1.28 ぼ 面
7506	dsf						
2022-05-12 15486	AP: courier		bb	13.27		1.04	14.31 🕜 📑
2022-10-03 15399	EXP: 1 @ 0.4 Photocopies				0.40	0.01	0.41 🗷
2022-12-22 15919	EXP Test MedChart expenses MEDCHART-Record-"Otolaryngology- Head and Neck Surgery Dr Eli Akbari MD" Elaheh AkbariR271752				20.00	0.22	20.22 📝
2022-12-22	EXP Test MedChart expenses MEDCHART-Record-Surrey Memorial				20.00	0.22	20.22 🗷

Reports, Billing/Cheque Templates

- Dozens of tokens (fields) and Layouts for Reports
 - Ie Contact Report File Settings Layout
- We have 60 tokens to Billing or Cheque Experience
 - Improved Layouts, additional Filters in Billing
 - New Fields in Cheques (ie custom Memo's)
- MicroDot enhancements for Cheques

EFT Support

Support payment and tracking system for vendors to allow automatic electronic payments and better 1099's

	er Conflict Search New File New Contact New Group Contact			
1 (Member) + 123-456-7890 (Member) + james.harris@:	Bartlett, John; Bartletss Co oluno.legal 123 Main Street, Suite 300, Toronto, Ontario, M2M 2M2 4 & & This is in the contact manager description field.			
General Ledger Communicatio	ns Vendor			
				_
✓ Vendor Info				
Is Vendor				
Vendor				
Account # 999888	GL Account Activity Code			
Tax #				
Tax #				
Banking				
Bank Name				
TEST BANK				
Branch MY BRANCH				
MT BRANGT				
Institution Number Transit abcd 123	Account Number 12345			
Name on Account				
Test Guy				
SWIFT Code				
swift				
ABA Code				
aba				
Currency Code CAE				
Supports EFT transfers				
Vendor Arrangements			E-mail to a mail to a	
Description	Payment Method	Adjustment Type	Adjustment Direction	
		No Vendor Arrangements		



Ledes Tweaks

- Ledes Blv V2 support
- non-Ascii char support
- Using Filegroups to
 Customize Ledes
 - Multiple Firm IDs
 - Different verbiage for VAT/HST
 - Alternative Lawyer labelling
- We support 100's of variation on Lede's standard

Setting: Setti	default Description Default File Group Department	st_ns konne streac
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State Zip Country New York 10001 United States Vork 212-555-54444 © Ternali info@DeviosSoftware.com Vebsite New York 10001 Vork 212-555-44444 Vork 212-555-44444 Vebsite Info@DeviosSoftware.com Vebsite New York Vork 212-555-4444 © Vebsite Info@DeviosSoftware.com Vebsite New York Vebsite New York Vork Visite Vebsite New York Vebsite New York Vebsite New York Vebsite Network Vebsite Network Vebsite Network Vebsite Network Vebsite Network Vebsite Network Vebsite Vebsite </td <td>Fee Allocation Responsible Available Groups: Selected</td> <td></td>	Fee Allocation Responsible Available Groups: Selected	
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Cloning Soluno

Banking Contact Rece Operating Bank Trus								
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File Manager Contact Manager Conflict Search New File New Contact New Group Contact	act	Banking Contact Receivables Payables Other						
65-002 Split, Mr & Mrs		Contacts Ledger						
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split Matrimonial/Family Law General Ledger		Michael's US Law Firm						
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Open Date Area of Practice Default Task Responsible Rate Group Sep 29, 2021 mat bw AT standard		38-001 test for transfer lit Total Files: 1	DL	DL	DL	standard	5/5/202	
Description (appears on invoices)		18 Angel, Nick 915 Wilshire Blvd Los Angeles, California 90017					Dianel@DevlosSoftware.com	m 🕼
split billing		18-003 Nick Angel vs State of California lit Total Files: 1	DL	DL	DL	standard	2/2/202	:1 🕜
<i>h</i>		assn Association fees to be disbursed. pi	DL	DL	DL	standard	10/26/202	21 2 1
Sync File(Matter) to LawToolBox		Total Files: 1 9 Ball, Mike						ß
Balances		Alabama 9-001 Ball vs Cooperators insurance pi Total Files: 1	DL	DL	DL	standard	dianel@DevlosSoftware.co 11/16/202	
Worked Billable Fees Costs Other Payments Unbilled 0:00 0:00 \$0.00 \$0.00 \$0.00	Balance \$0.00 (WIP)	1 Bartiett, John 123 Main Street, Suite 300					203-456-789	0 🕜
Billed 0:00 0:00 \$1,000.00 \$0.00 \$0.00 \$100.00	\$900.00 (AR / Amount Due)	New Haven, Connecticut 06510 1-001 John Bartlett - House purchase - 123 Main Street re	DL	DL	DL	standard	1/2/201	8 🕑
Total Amount 0:00 0:00 \$1,000.00 \$0.00 \$100.00 Last Entry: Sep 29, 2021 \$	\$900.00	1-002 second file for John lit Total Files: 2	DL			standard	2/10/202	
		61 Berry's Berries 100 White Road					Diane.lowery@soluno.leg	al 🗭
Validate		New York, New York 61-001 Berry's Berries vs ABC Trucking in dispute of shipping costs corp Total Files: 1	DL	DL	DL	standard	9/1/202	.1 🕜
File Staff		74 Black, Jacob 88 Water Street						ß
Save Cancel	Close File Reopen A File	Salt Lake City, Utah 45678	DL	DL	DL	standard	1/17/202	2 7
		NACENTRAL 1: Solumo® 1.8.23: @2023 Device Software Inc. : Privacy Policy						

GL Budgeting

GL	SL Acct	Account Description	January	🕄 🛍 February	🕄 🛍 March	🗐 🗊 April	🕄 🛍 May	🗐 🛍 June	🗄 🛍 July	🕄 🛍 August	🗐 🗊 Septer	nber 🗐 🛍 Octob	er 🕄 🛍 Noven	nber 📲 🛍 December	- Ð 1
Inc	ncome														
Ex	xpense														
	5020	Accounting & Legal													
	5040	Advertising & Promotion													
	5060	Auto Expense	1,111	.00											
	5080	Bad Debts													
	5100	Bank Charges													
	5120	Bookkeeping													
	5140	Business Taxes	222	.00											
	5160	Cash Payment Write Down											-		
	5170	Corporate Income Tax									Copy Month: J	anuary 2017			
	5180	Courier											_		
	5200	Depreciation Expense	5,500	.00							Rest C	f Fiscal Year To December 201			
	5220	Disbursement - Unbilled W/Os									(rebruary zorn	To December 201	<u></u>		
	5240	Donations	11	.00							Ne	kt Month			
	5260	Equipment Lease									(Febr	uary 2017)			
	5280	Insurance									Same Mo	nth - Next Year			
	5300	Insurance - Professional liability									(Jan				
	5320	Interest Expense									Provid	ous Month			
	5340	Legal Research									(Dece	mber 2016)			
	5360	Library & Subscriptions													
	5380	Maintenance & Repair										h - Previous Year Jary 2016)			
	5400	Meals & Entertainment											-		
	5420	Membership & Professional Dues									Cancel				
	5440	Office General Expense									_		-		
	5460	Office Supplies													
	5480	Parking													
	5500	Payroll													
	5510	Fax													
	5520	Photocopy													
	5540	Postage													
	5560	Registration													
	5580	Rent													
	ncome	• · · · •		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Expense		6.844		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	let Income		-6,844		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



					Run in current date of Feb	7, 2023			
					Budget Variance Report				Jan 1 - Jan 31 - 20
					X Frim				
			Pe	riod			Year	to Date	
		Actual	Budget	Difference	% Variance	YTD Actual	YTD Budget	Difference	% Variance
INCOME	I I								
1	00 BILLINGS								
	100 - ML Income	\$1,000	\$2,000	-\$1,000	-50.00%	\$3,000	\$4,000	-\$1,000	-25.00%
	100 - AT Income	\$1,000	\$1,000	\$0	0.00%	\$2,000	\$2,000	\$0	0.00%
	100- GD Income	\$1,000	\$1,000	\$0	0.00%	\$2,000	\$2,000	\$0	0.00%
Total Inc	come	\$2,000	\$3,000	-\$1,000	-33.33%	\$5,000	\$6,000	-\$1,000	-16.67%
EXPENS	SES								
4	200 - Printing	\$444	\$888	-\$444	-50.00%	\$666	\$1,776	-\$1,110	-62.50%
4	201 - Salaries	\$44	\$5,555	-\$5,511	-99.21%	\$66	\$11,110	-\$11,044	-99.41%
4	500 - REnt	\$222	\$333	-\$111	-33.33%	\$333	\$666	-\$333	-50.00%
Total Ex	penses	\$488	\$6,443	-\$5,955	-92.43%	\$732	\$12,886	-\$12,154	-94.32%
Net Inco	ome	\$1,512	-\$3,443	\$4,955	59.09%	\$4,268	-\$6,886	\$11,154	77.65%
Asset									

Optimizations

Two Major Optimizations:

- 1. Conflict Search = 80-90% faster
- 2. GL Reports = 90% faster

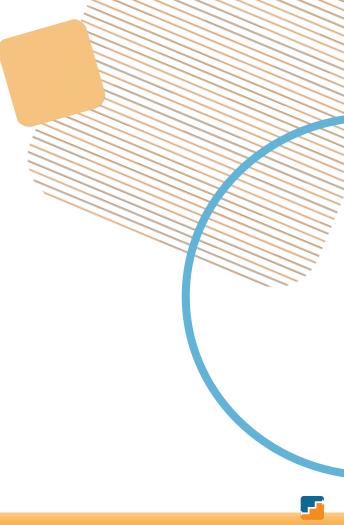


Other Critical Features

- 1. Two Factor Authentication Screen tweaked to remove pain points validating your login.
- 2. You can now request a Check/Cheque with a negative balance. You are only forced to override for Release (To preemptively create disbursements for end-of-month closing in areas of law such as Real Estate)
- 3. Audit Trail Improvements. Deleted invoices will now show who deleted it
- 4. Infrastructure upgrade: We have released improvements to support recent changes by Microsoft
- 5. Security Tweaks: a number of changes to improve how user permissions are handled and identified holes fixed
- 6. Auto-Logout to improve security & reduce Licenses
- 7. Various Accounting / Data Integrity Bugs/Tweaks. We have closed a number of data integrity edge-cases
- 8. File Numbering improvements
- 9. Upgraded Support and Chat System
- 10. Minor tweaks/spelling fixes
- 11. Much, much more



New Integrations





Settings General Ledger Accounts Bank Accounts Areas of Practice

Disabled

HN 43 (४) <u>[7]</u> 1. File Manager Contact Manager Conflict Search New File New Contact New Group Contact ▶ 123-456-7890 Bartlett, John; Bartletss Co 1-1 Department Codes 🕨 lawrence.beharry@soluno.legal 123 Main Street, Suite 300, Toronto, Ontario, M2M 2M2 📫 🙎 Doug Dagworthy/MM/MM John Bartlett - House purchase - 123 Main Street Contact Counseling Soluno and LawToolBox have partnered to allow you to automatically or manually sync Files and Contacts NetDocuments General Ledger **Dpen Date** Area of Practice Default Task Responsible Rate Group Mar 1, 2016 DD standard COU bw Description (appears on invoices) John Bartlett - House purchase - 123 Main Street Open Matter In LawToolBox File Staff **Billing Settings** Out 14/A durant of Dilling Contact Manager | Conflict Search | New File | New Contact | New Group Contact File Manager Cappello, Jack 2-1 +27 31 251-1778 Jack.Cappello@jackandcappello.co.za 456 East Street, Apt 1001, Durban, KwaZulu-Natal, 4001 1 & & Doug Dagworthy Jack Cappello - General Matter Contact Bankruptcy Net Documents Deadlines (LawToolBox) General Ledger

netdocuments Username

Automate procedural and custom deadlines, so you can focus on your cases, not your court dates.

Email NetDocuments Credit Cards LawToolBox

LawToolBox Connector Settings

Sign Up For / Enable LawToolBox

LawToolBox

What is LawToolBox

Status:

Number of Connections/Licenses:

he consequences of missing a court deadline for a law firm are severe. They are the biggest cause of malpractice suits a

- · In a single click, update your calendars for all your team members
- Minimizing risk, in a methodical matter-based method with deadlines shared to calendars
- · Electronic calendaring means discounts on malpractice insurance

LawToolBox's court rule and deadline management system combines rules-based calendaring with case-specific deadlines another court deadline.

Key Features: Learn More

- · Rule-based calendaring automates your administrative tasks, so you can focus on your cases
- · Update calendars for team members with a single click
- Trigger dates instantly calculate deadlines
- See upcoming dates in your matters and lists
- Build your own templates to suit the way your firm operates
- Customize the deadline calculators
- · and much more ...

Sign Up For / Enable LawToolBox

Password



FileVine		Soluno
Matter	← →	Files
Clients	← →	Contact
Time Entries		Time/Fee Sheet
Fee Entries		Time/Fee Sheet
Expenses		Expense Recovery





Real Estate Conveyancer + Soluno for Trust Accounting / Disbursements

< Dashboard		< Mat	ter_Sale	e_Trust_v2 >			_
2 Title Search	Trust						Save
Details							
Property	Description	Payee		Account	Date	Funds In	Funds Out
i Sellers	Funds Received from Jim Maccotte Law Corporation		Ψ.	· · ·	2022-01-01	\$578,871.23	
Buyers	Pay out of Royal Bank of Canada Mortgage as at April 05, 2022 with a per diem of \$15.50	La	Ŧ	- v	2022-01-01		\$216,922.7
Payouts	Transfer proceeds to purchase file #F34675		Ŧ	~	2022-01-01	Ö	\$164,823.7
Accounts	Holdback pending receipt of Final Meter Reading bill from City of New Westminister				2022-01-01	Ö	\$500.0
Debit/Credit	Payment of Account of Mark Mickelson Law Corporation		Ŧ		2022-01-01	Ö	\$561.3
Documents	Legal fees for Sale transaction		×	v	2022-01-01	\$895.00	
Web Filing	Disbursements		~		2022-01-01	\$444.77	
1) Trust	Other Charges		~	-	2022-01-01	\$0.00	
	GST and PST		-	-	2022-01-01	\$130.05	
	Total Account		Ŧ	Ý	2022-01-01	\$1,469.82	\$1,469.8
	Funds paid to Andy Robinson		Ŧ	· · · · ·	2022-01-01		\$194,593.5
osseini, 1 version 1d 🗕	100% + Totals					\$578.8 5 3	Show All

Other Integration Support

- i. Supporting a dozen partner or customer integration projects
- ii. Improvements to Soluno Remote
 - 1. Supports importing Time in addition to Expenses
 - 2. New fields to exports and imports
 - 3. Performance Improvements/Logging features.
- iii. Zapier (universal integrator)
 - 1. Universal integrations with 100's of applications
 - 2. Integrate without development



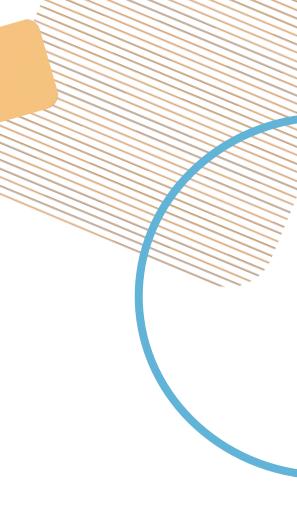
Soluno Remote (CSV Import/Exporter)

- i. Case/File and Client/Contact (Export from Soluno)
 - 1. WorldDocs
 - 2. iManage
- ii. **Expenses** (using standard csv file inputs)
 - 1. CopiTrak (Most Common)
 - 2. EquiTrac
 - 3. PaperCut
 - 4. DocStar
 - 5. PrintAudit
- iii. **Time** (using standard csv file inputs)
 - 1. Carpe Diem





Things You Don't Know that You Don't Know



Cool Hacks

Bank Rec Drag and Drop

EFT

Ledes / eBilling

Labels (Half Page)

NACHA - Positive Pay



Labels

	✓ Labels Generated less t	than 15 minutes ago 🐚 Export to: 🕅 🔀 🔀
V Labels Generated less than 15 minutes ago 🍓 Ex	MATTER: 1-10 CLIENT: 1 OPENING DATE:	2020-01-02 @
Bartlett, John Bartlett, John 123 Main Street, Suite 300 123 Main Street, Suite 300 Toronto, Ontario M2M 2M2 Toronto, Ontario M2M 2M2 123-456-7890 123-456-7890 1 1 1-10 1-10 test test 2020-01-02 2020-01-02 AT AT	NAME: Bartlett, John ATTENTION: ADDRESS: 123 Main Street Suite 300 Toronto, Ontario M2M 2M2 RE: test	
Bartlett, John Bartlett, John 123 Main Street, Suite 300 123 Main Street, Suite 300 Toronto, Ontario M2M 2M2 Toronto, Ontario M2M 2M2 123-456-7890 123-456-7890 1 1 1-10 1-10 test test 2020-01-02 2020-01-02 AT AT	Home:123-456-7890Fax:555-55555Work Mobile:905-555-3214Work::416-555-9874Home email::james.harris@soluno.legalOther email::diane.lowery@soluno.legal	
Bartlett, JohnBartlett, John123 Main Street, Suite 300123 Main Street, Suite 300	Assigned Responsible Alan Tuback Alan Tuback	



Quick Keys Examples

~

When doing time entries or transaction

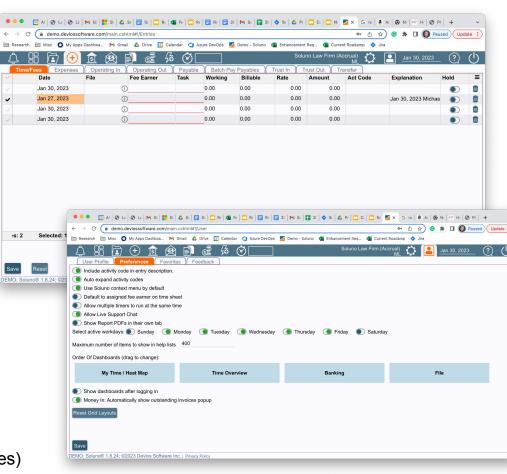
Date Control

- Increment date + -
- * Today's date

Explanation

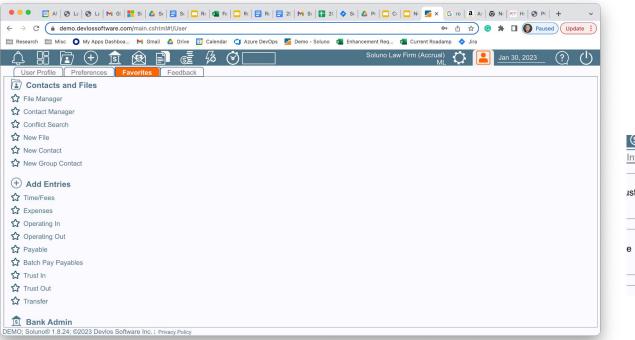
- /d Today's Date
- Your initials /u
- /f Your Full Name

Two Chars + space = Activity Code (ie ph = photocopies)





Favorites



nvoice	Adjust	Invoice Stat	tements Held Ema
ist Up To	File In	ct Info: fo: me/Fees e ctrl+right click for b	rowser menu
e Depa	rtment	Responsible	Bill Frequency Automatic



Coming this Quarter

Billing Realization

Client	Name		Resp		Wkg		Time	Fe			ffective
Matter	Descript	ion	Lwyr	Type	Lwy	Hours	Value P	Adjustments	Billed	Realized F	late / H:
	Matter									-	
0001		: Davis, Ben re Bankruptcy	TD	bank	TD	1.00	550.00	0.00	550.00	100.00%	550.00
	Matter T	otal				1.00	550.00	0.00	550.00	100.00%	550.0
	Matter										
0001A		0001A: CASE, Counselling Ser	TD	cou	TD	20.00	2000.00	0.00	2000.00	100.00%	100.0
	Matter T	otal				20.00	2000.00	0.00	2000.00	100.00%	100.0
	Matter										
0002	MATTER 2	: FLYNN, George re Business	TD	corp	TD	0.10	10.00	5.00	15.00	150.00%	150.0
	Matter T	otal				0.10	10.00	5.00	15.00	150.00%	150.0
3 3,	Matter										
0003	MATTER 3	: SMITH, John vs. Rusty Pro	TD	lit	TD2	1.50	225.00	0.00	225.00	100.00%	150.0
	Matter T	otal				1.50	225.00	0.00	225.00	100.00%	150.0
4,	Matter										
0004		: FLINSTONE, Fredrick re Dr	TD	est	TD	0.00	400.00	0.00	400.00	100.00%	
	Matter T	otal				0.00	400.00	0.00	400.00	100.00%	
						22.60	3185.00			100.16%	
	FIFM TOT		** Sur	nmary	by Wo	orking Lawy		5.00	3190.00	100.16%	141.1
TD2 Toob	a Dawood a Dawood 2		** Sur	nmary	by Wo	21.10 1.50	er *** 2960.00 225.00	5.00	2965.00 225.00	100.17%	140.5
	a Dawood a Dawood 2	* These sections will break	** Sur	nmary	by Wo	orking Lawy 21.10	er *** 2960.00	5.00	2965.00	100.17%	141.1 140.5 150.0 141.1
TD2 Toob	a Dawood a Dawood 2	These sections will break down the above-mentioned information by summary				21.10 1.50	er *** 2960.00 225.00 3185.00	5.00	2965.00 225.00	100.17%	140.5
ID2 Toob Tota	a Dawood a Dawood 2	These sections will break down the above-mentioned information by summary of working/responsible				21.10 1.50 22.60	er *** 2960.00 225.00 3185.00	5.00	2965.00 225.00	100.17%	140.5
TD2 Toob Tota	a Dawood a Dawood 2 1: a Dawood	These sections will break down the above-mentioned information by summary of working/responsible lawyer and types of law.	Summe	ary by	/ Resp	21.10 1.50 22.60 ponsible La 22.60 22.60	er *** 2960.00 225.00 3185.00 wyer *** 3185.00 3185.00	5.00 0.00 5.00	2965.00 225.00 3190.00	100.17% 100.00% 100.16%	140.5 150.0 141.1
ID2 Toob Tota ID Toob Tota Dank Bank: corp Gene: cou Count	a Dawood 2 1: a Dawood 2 1: a Dawood 1: ruptcy ral Corporate seling	These sections will break down the above-mentioned information by summary of working/responsible lawyer and types of law.	Summe	ary by	/ Resp	21.10 1.50 22.60 22.60 22.60 22.60 22.60 22.60 20.00	er *** 2960.00 225.00 3185.00 wyer *** 3185.00 3185.00 3185.00 0.00 2000.00	5.00 0.00 5.00 5.00 5.00 0.00 0.00	2965.00 225.00 3190.00 3190.00 3190.00 550.00 15.00 2000.00	100.17% 100.00% 100.16% 100.16% 100.00% 150.00%	140.5 150.0 141.1 141.1 141.1 550.0
ID2 Toob Tota ID Toob Tota Dank Bank Corp Gene: Sour Goun est Will:	a Dawood 2 1: a Dawood 2 1: a Dawood 1: ruptcy ral Corporate	These sections will break down the above-mentioned information by summary of working/responsible lawyer and types of law.	Summe	ary by	/ Resp	21.10 1.50 22.60 22.60 22.60 22.60 22.60 22.60 22.60 22.60 1.00 0.10	er *** 2960.00 225.00 3185.00 wyer *** 3185.00 3185.00 w *** \$550.00 10.00	5.00 0.00 5.00 5.00 5.00	2965.00 225.00 	100.17% 100.00% 100.16% 100.16% 100.16%	140.5 150.0 141.1

Client Productivity

- 1. "Top Clients by Billed Fees"
- 2. "Top Clients by Unbilled Fees"
- 3. "Top Clients by Paid Fees"
- 4. "Top Clients by Total Fees"
- 5. "Top Clients Disbursements by Billed Disbursements"
- 6. "Top Clients by Unbilled Disbursements"
- 7. "Top Client by Total Disbursements"
- 8. "Top Clients by Total A/R Balance"
- 9. "Top Clients by Total Trust Balance"
- 10. "Top Clients by Total Paid"
- 11. "Top Clients by Total Billed"
- 12. "Top Clients All Summaries"

		Top Clients by Total Paid Soluno Law Firm (Accrual)					
Contact File	File Desc	TotalPaid	%TotalPaid				
30 Carson, Johnn	AT, ML, DP	5500	5.9%				



Memorize / Recurring Transactions

Reallocation at the Time of Billing

							•• •	
User	Full Name		Fee Earner	Fee Alloc. % for G/L	Introducing %	Billing Order	Note	
AT	Alan Tuback		~		100	1	Ū	
ed					0		Ŵ	
							Soluno Law Firm (Accr	ual) 🚜 💽 📖 ao aooo
	7			🙊 🗊 👼 🐼 🞯				ual) 🔅 🞴 Jan 30, 2023
	Da	eq Select C	Charges					
		Client	Name					
	ar		Bartlett, John; Bartlets	ss Co				
	ar	2 File	Description					
		1-12	TEST Casefile					
	ar							
	ar	2 Expand	All					
	ar	2						
	ar	12 • 4T	īme	\$0.00				
	ar							
	ar	2 75	xpense	\$0.00				
		► F	Retainer	\$1,000.00				
		Receipts Jan 24,	and Trust Up To •	Changing this date will recalculate the Trust	and Balance Forward information			
				\$104.35				
		• E	alance Forward	\$452.00				

41 20

Upcoming 2023



Key Goals of 2023

• Highest

- Report Additions
- Reallocation of Fees at Billing
- Recurring Transactions / Memorized
- Finish Simple Interest

• Key Items

- Trust to Gen Multiple Transfers
- Custom Trust Holds by Payment Type
- Better Excel Export Options
- Client Introducing and Referring Lawyer Tracking
- Lawyer Budgeting
- Mobile App
- Report Changes
 - Sort By Option
 - WIP Summary
- Reversing Write-Offs
- Backdating Invoices
- Client Consolidated Bill

Q4 2023: MyCase/Soluno Integration



mycase



Thank You

