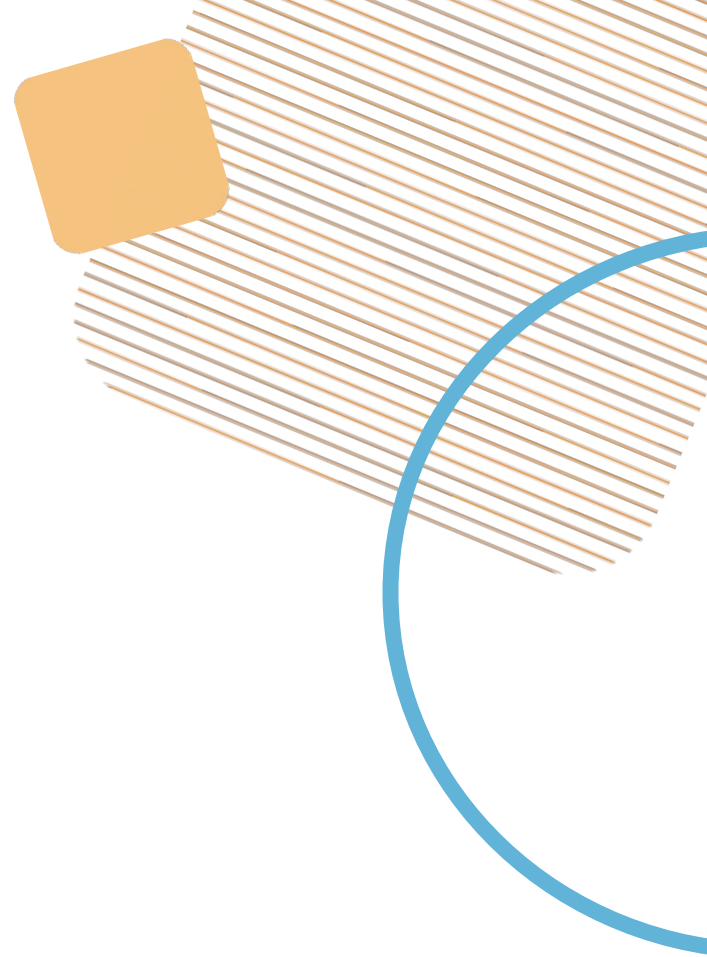




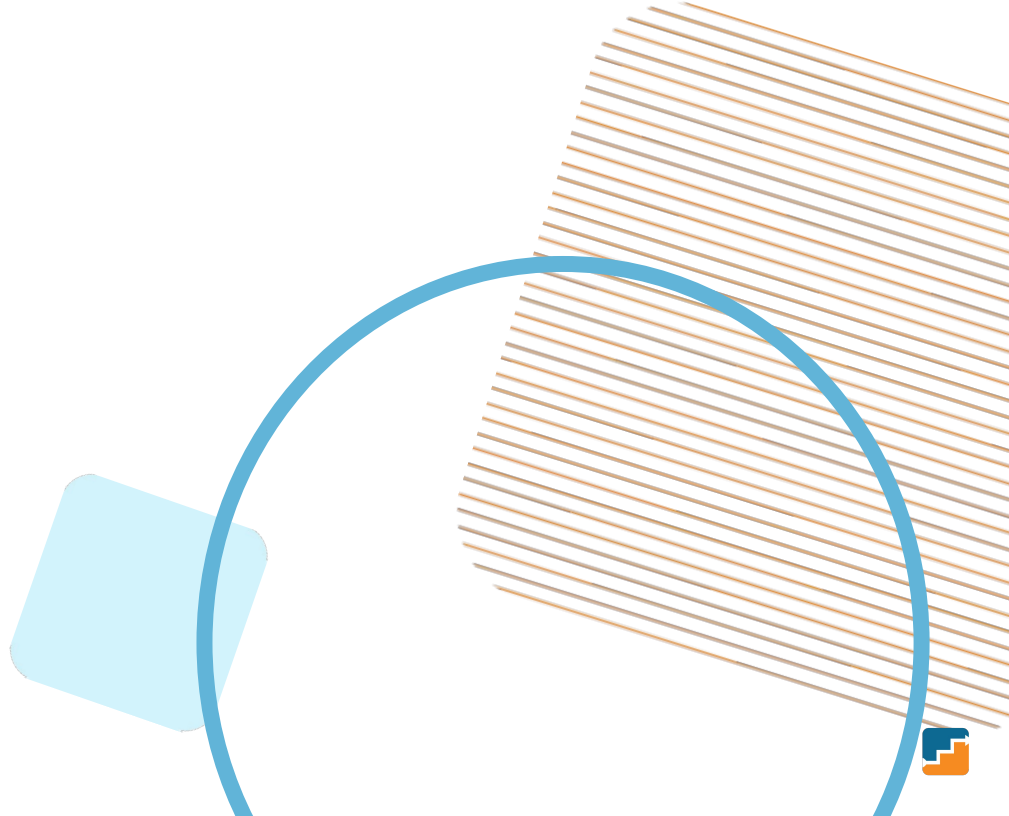
New Year, New Features Webinar

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

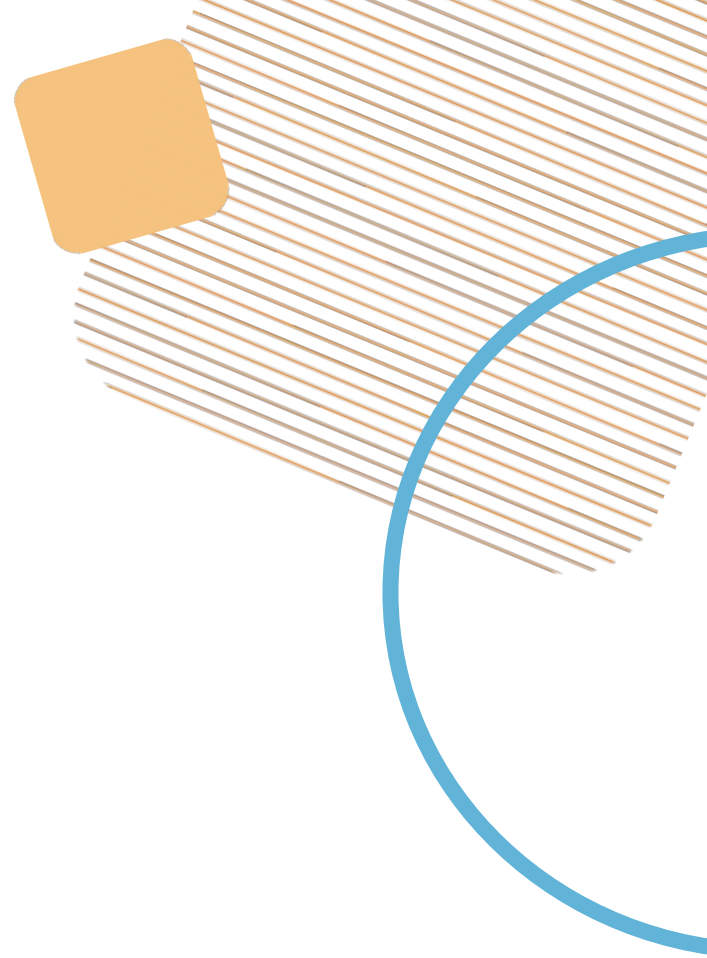


Deborah Schaefer

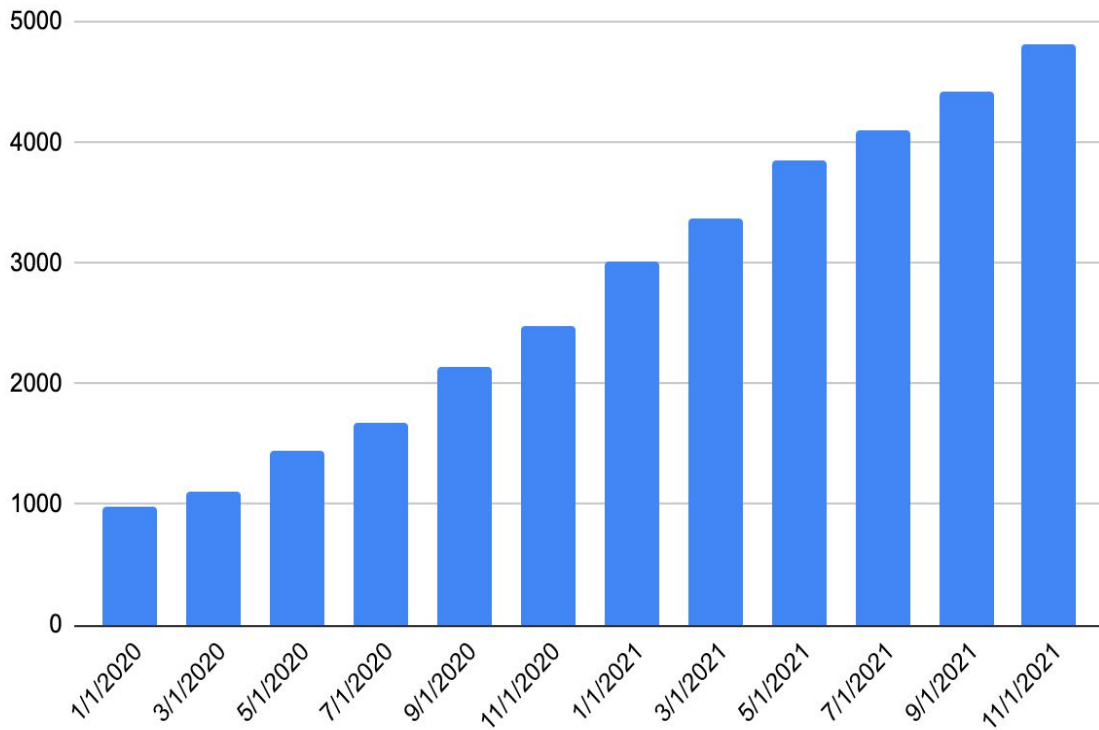
**Certified Accountant and
Consultant**

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

Banking **Contact** Receivables Payables Other

Contacts Ledger

☒ All contacts

Generated 4 - 24 hours ago Export to: [X] [PDF] [CSV] [Excel]

All contacts
Gabe's Debug Firm
2022-06-27

Contact	File	File Desc	AOP	Resp	Lead	Assg	Rate	Source	Open Date
1	Dudeson, Guy	1 Fake St Toronto, Ontario A1A 1A2							
1	Total Files:	1	bank	GGC	GGC	GGC	standard		2022-02-17
a001	Fellow, Imaginary								
2	Guyson, Dude	2 Fake St Toronto, Ontario A1A 1A1							
a002	Madeupski, Fake								
	Total Files:	0							
	Total Files:	0							

Contact referral Summary

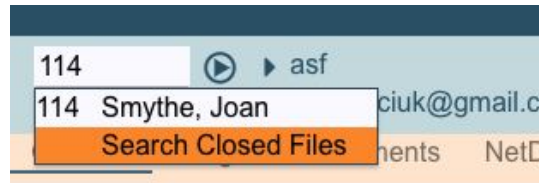
Referral Source	No Referral
Total	

Case File referral Summary

Referral Source	No Referral
Total	

Report Selections:

- Completed : June 27, 2022 4:29 AM
- Requested By : Gabe Chiarelli
- IncludeClients : true
- IncludeVendors : true



Close File

Closed File #
005

Close Date
July 15, 2021

File Location

☒ View/Print Client Ledger after

Once a file is closed it is removed from searches, and reports, but transactions are still reflected in your financial statements. You are able to re-open a file in the future.

Ok

Cancel

Additional Communication Methods

Additional Contacts

Save

Cancel

Close File

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)
7. 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
Gabe's Debug Firm
2022-06-27

Contact	File	File Desc	AOP	Resp	Lead	Assg	Rate	Source	Open Date
1		Dudeson, Guy 1 Fake St Toronto, Ontario A1A 1A2							
1			bank	GGC	GGC	GGC	standard		2022-02-17
Total Files:		1							
a001		Fellow, Imaginary							
Total Files:		0							
2		Guyson, Dude 2 Fake St Toronto, Ontario A1A 1A1							
Total Files:		0							
a002		Madeupski, Fake							
Total Files:		0							
Contact referral Summary									
Referral Source			Count						
No Referral			4						
Total			4						
Case File referral Summary									
Referral Source			Count						
No Referral			1						
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

▶ Additional Addresses

▼ Additional Communication Methods

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

Add



Receivable Summaries by Area of Law

Billed AoP by Collecting Summary										
Bankruptcy	Percent	Hours	Fees	Hard	Soft	Expenses	Federal Tax	Local Tax	Tax	Billed
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Billings Journal Solano Law Firm (Accrual) All Dates										
Client	Name	Inv								
File	Date									

2022-06-28										
Client	Name	Inv								
File	Date									
Diane Polle	0.88	16.00	2,050.00	0.00	65.00	65.00	274.95	0.00	274.95	2,389.95
Corporate	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alan Tubaci	9.76	57.20	22,185.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Doug Dagga	0.62	5.00	1,250.00							
Dean Polle	0.03	0.00	0.00							
Counseling	0.00	0.00	0.00							
Alan Tubaci	0.61	1.10	800.00							
Criminal	0.00	0.00	0.00							
Doug Dagga	0.16	1.83	386.13							
Dean Polle	2.07	13.10	4,260.00							
Matthew Mi	0.86	0.00	200.00							
Estates	0.00	0.00	0.00							
Alan Tubaci	3.46	34.10	7,450.00							
Doug Dagga	0.32	6.00	598.99							
Dean Polle	0.02	0.00	0.00							
Litigation	0.00	0.00	0.00							
Alan Tubaci	19.53	134.00	36,835.37							
Doug Dagga	7.11	22.60	12,915.00							
Diane Polle	9.29	29.00	22,725.00							
Dean Polle	0.81	12.10	1,009.70							
Matrimonial/Fa	0.00	0.00	0.00							
Alan Tubaci	5.73	8.10	13,112.74							
Diane Polle	1.39	0.00	3,800.00							
Matthew Mi	0.35	0.00	800.00							
Miscellaneous	0.00	0.00	0.00							
Alan Tubaci	1.24	13.50	2,825.00							
Doug Dagga	4.70	31.70	8,868.00							
Diane Polle	0.10	0.00	100.00							
Real Estate	0.00	0.00	0.00							
Alan Tubaci	10.92	83.35	26,439.99							
Doug Dagga	9.35	38.60	19,497.86							
Diane Polle	3.82	16.00	9,350.00							
Dean Polle	6.90	46.90	16,280.00							
Total	100.00 %	\$70.18	\$213,738.78	\$11,984.19	\$17,249.74	\$29,233.93	\$29,638.62	\$499.28	\$30,137.90	\$273,110.61

AoP by Collecting Summary - Counseling & Alan Tubaci										
	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%	

Edit Layout

- ☐ Receivable Summary Credit/Introducing Lawyer
- ☐ Receivable Summary Responsible Firm -
- ☐ Receivable Summary Case Referral Firm -
- ☐ Receivable Summary Area of Practice Firm -
- ☒ _RECEIVABLEFIRMSUMMARYAREAOFLAWCOLLE
- ☒ _RECEIVABLEFIRMSUMMARYAREAOFLAWCOLLE
- ☒ _RECEIVABLEFIRMSUMMARYAREAOFLAWCOLLE
- ☐ Receivable Summary Collecting -
- ☐ Receivable Summary Credit/Introducing Lawyer
- ☐ Receivable Summary Responsible -
- ☐ Receivable Summary Case Referral -
- ☐ Receivable Summary Area of Practice -
- ☒ _RECEIVABLESUMMARYAREAOFLAWCOLLE
- ☒ _RECEIVABLESUMMARYAREAOFLAWCREDI
- ☒ _RECEIVABLESUMMARYAREAOFLAWRESPO
- ☐ Receivable Summary Billed Collecting -
- ☐ Receivable Summary Billed Credit/Introducing L
- ☐ Receivable Summary Billed Case Referral -
- ☐ Receivable Summary Billed Responsible -
- ☐ Receivable Summary Billed Area of Practice -
- ☒ _RECEIVABLESUMMARYBILLEDAREAOFLAV
- ☒ _RECEIVABLESUMMARYBILLEDAREAOFLAV
- ☒ _RECEIVABLESUMMARYBILLEDAREAOFLAV
- ☐ Receivable Footer Report -

Back

Next

Cancel

Reports

Contact Report -> Unbilled
by Interest (expenseint)

Entry Sort Order

Entry Date->Entry Number

Simple Interest on charges

Yearly Rate

0.00

☒ Use Today's date (unchecked = use end date)

Generate to

☒ Unbilled Expenses with Interest

Generated less than 15 minutes ago Export to:

Unbilled Expenses with Interest							2023-01-27
Soluno Law Firm (Accrual)							
All Dates							
Client	Description						
File	Info						
Date	Explanation	Acc	Ref	Hard	Soft	Int	Resp
Entry							Total
10	ABC Law Firm						
10-1	This is the file description						DLP
Details				2.65	3.00	0.81	6.46
1	Bartlett, John						
1-1	John Bartlett - House purchase - 123 Main Street						DD
2020-07-24	HELD - EXP				1.00	0.28	1.28
7506	dsf						
2022-05-12	AP: courier		bb	13.27		1.04	14.31
15486							
2022-10-03	EXP: 1 @ 0.4				0.40	0.01	0.41
15399	Photocopies						
2022-12-22	EXP				20.00	0.22	20.22
15919	Test MedChart expenses MEDCHART-Record-"Otolaryngology-Head and Neck Surgery Dr Eli Akbari MD" Elaheh AkbariR271752						
2022-12-22	EXP				20.00	0.22	20.22
15920	Test MedChart expenses MEDCHART-Record-Surrey Memorial						

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

File Manager

Contact Manager

Conflict Search

New File

New Contact

New Group Contact

1

▶ 123-456-7890

Bartlett, John: Bartletts Co

(Member)

▶ james.harris@soluno.legal

123 Main Street, Suite 300, Toronto, Ontario, M2M 2M2

This is in the contact manager description field.

General

Ledger

Communications

Vendor

▼ Vendor Info

Is Vendor

Vendor

Account #

999888

GL Account

Activity Code

Tax #

Banking

Bank Name

TEST BANK

Branch

MY BRANCH

Institution Number

abcd

Transit

123

Account Number

12345

Name on Account

Test Guy

SWIFT Code

swift

ABA Code

aba

Currency Code

CAC

☒ Supports EFT transfers

Vendor Arrangements

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

The screenshot displays the 'Settings' window for a firm named 'Michael's US Law Firm'. The window is divided into several tabs: 'Firm', 'Features', 'File', and 'Banking'. The 'Firm' tab is currently selected, showing fields for the firm's name, address, city, state, zip, country, work, fax, email, website, business number, and other firm IDs. The 'Features' tab is also visible, showing options like 'Task-based bill', 'Contingency', and 'Invoicing'. The 'File' tab shows 'Available Groups' and 'Selected' fields. The 'Banking' tab is partially visible on the right.

Settings | General Ledger Accounts | Bank Accounts | Areas of Practice

Firm | Features | File | Banking

Firm name
Michael's US Law Firm

Address
921 S. 8th Avenue
Suite 600

City
New York

State
New York

Zip
10001

Country
United States

Work
212-555-5555

Fax
212-555-4444

Email
info@DeviosSoftware.com

Website
<https://www.soluno.legal/>

Business Number
98764321

Other Firm ID 1

Other Firm ID 2

Time Zone

Features

☒ Task-based bill
☐ Require activity code on time and expense entries

Area of Practice

☒ Contingency (can be excluded on some reports)

☒ When invoicing, automatically mark non-billable client work as billed

Firm ID to use when invoicing (Ledes output)
8881

Fee Earner's Ledes ID to use with invoices
Ledes 1

Markup as percent
0

Invoicing

Bill Frequency
Include

☒ Include if trust balance and no new charges

☒ Do not test for previous balance or current charges, always include

☒ Must have trust balance

Fee Allocation

Responsible
Available Groups: _____ Selected: _____

Save **Cancel**

User Editor: DD

User Profile - Groups - Security - Associations - Payables

Enter the registration numbers for the user:

GST/HST Number

PST Number

Law Society Number
24808640

Legal Aid Number

Attorney General Number

ICBC Number

Membership Number

Ledes M 1
11

Ledes M 2
12

Ledes M 3
13

Save **Cancel**

Contact

Generated less than 15 minutes ago Export to:

Contact File	File Desc	AOP	Resp	Lead	Assg	Rate	Source	Open Date
38	Alden, Frank							
38-001	test for transfer	lit	DL	DL	DL	standard		5/5/2021
Total Files:	1							
18	Angel, Nick 915 Wilshire Blvd Los Angeles, California 90017						Daniel@DevlosSoftware.com	
18-003	Nick Angel vs State of California	lit	DL	DL	DL	standard		2/2/2021
Total Files:	1							
assn	Association							
assn	association fees to be disbursed.	pi	DL	DL	DL	standard		10/26/2021
Total Files:	1							
9	Bail, Mike Alabama						dianeil@DevlosSoftware.com	
9-001	Bail vs Cooperators insurance	pi	DL	DL	DL	standard		11/16/2020
Total Files:	1							
1	Bartlett, John 123 Main Street, Suite 300 New Haven, Connecticut 06510						203-456-7890	
1-001	John Bartlett - House purchase - 123 Main Street	re	DL	DL	DL	standard		1/2/2018
1-002	second file for John	lit	DL	DL	DL	standard		2/10/2022
Total Files:	2							
61	Berry's Berries 100 White Road New York, New York						Diane.lowery@solutio.legal	
61-001	Berry's Berries vs ABC Trucking in dispute of shipping costs	corp	DL	DL	DL	standard		9/1/2021
Total Files:	1							
74	Black, Jacob 88 Water Street Salt Lake City, Utah 45678							
74-01	Jacob Black vs Toyota in warrantee dispute	lit	DL	DL	DL	standard		1/17/2022

GL Budgeting

General Ledger		Balance Sheet	Trial Balance	Profit and Loss	Close Period	Journal Entry	Budget (preview)	General Journal	GL Opening Balance				
Define Reporting													
JANUARY 2017 TO DECEMBER 2017													
GL Acct	Account Description	January	February	March	April	May	June	July	August	September	October	November	December
Income													
Expense													
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												
5180	Courier												
5200	Depreciation Expense	5,500.00											
5220	Disbursement - Unbilled W/Os												
5240	Donations	11.00											
5260	Equipment Lease												
5280	Insurance												
5300	Insurance - Professional liability												
5320	Interest Expense												
5340	Legal Research												
5360	Library & Subscriptions												
5380	Maintenance & Repair												
5400	Meals & Entertainment												
5420	Membership & Professional Dues												
5440	Office General Expense												
5460	Office Supplies												
5480	Parking												
5500	Payroll												
5510	Fax												
5520	Photocopy												
5540	Postage												
5560	Registration												
5580	Rent												
Income		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		6,844.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Net Income		-6,844.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Copy Month: January 2017

Rest Of Fiscal Year
(February 2017 To December 2017)

Next Month
(February 2017)

Same Month - Next Year
(January 2018)

Previous Month
(December 2016)

Same Month - Previous Year
(January 2016)

Cancel

Save Cancel



				Run in current date of Feb 7, 2023							
				Budget Variance Report				Jan 1 - Jan 31 - 2022			
				X Frim							
				----- Period -----				----- Year to Date -----			
				Actual	Budget	Difference	% Variance	YTD Actual	YTD Budget	Difference	% Variance
INCOME											
100 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 Income				\$2,000	\$3,000	-\$1,000	-33.33%	\$5,000	\$6,000	-\$1,000	-16.67%
EXPENSES											
4200 - Printing				\$444	\$888	-\$444	-50.00%	\$666	\$1,776	-\$1,110	-62.50%
4201 - Salaries				\$44	\$5,555	-\$5,511	-99.21%	\$66	\$11,110	-\$11,044	-99.41%
4500 - REnt				\$222	\$333	-\$111	-33.33%	\$333	\$666	-\$333	-50.00%
Total Expenses				\$488	\$6,443	-\$5,955	-92.43%	\$732	\$12,886	-\$12,154	-94.32%
Net Income				\$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

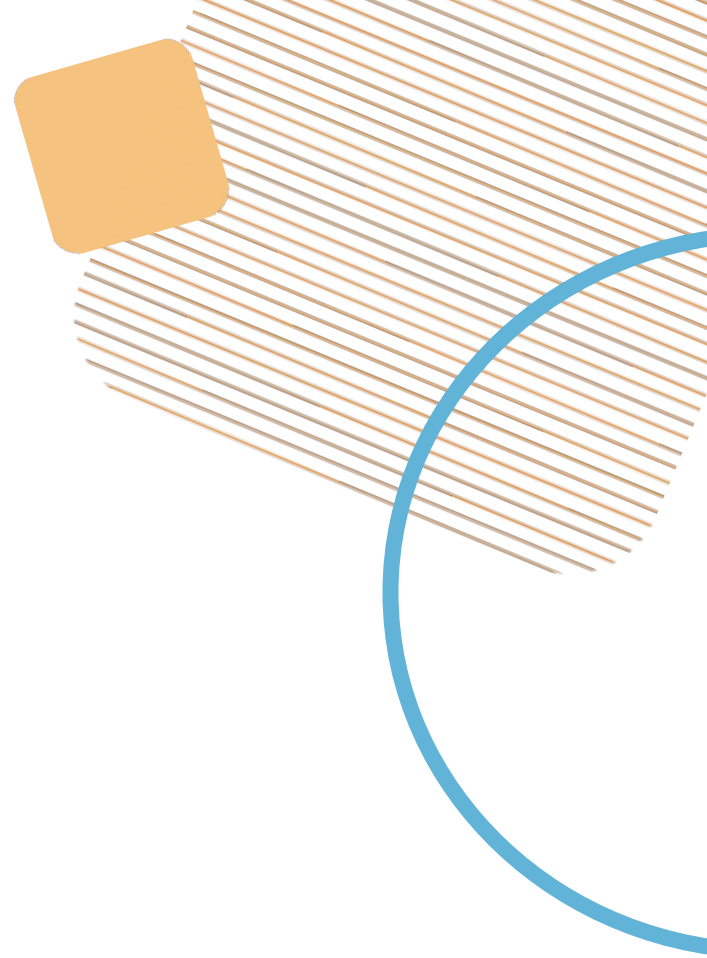


Other Critical Features

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



LawToolBox

Settings General Ledger Accounts Bank Accounts Areas of Practice Department Codes Services **LawToolBox**

Soluno and LawToolBox have partnered to allow you to automatically or manually sync Files and Contacts

LawToolBox Connector Settings

Status: Disabled

Number of
Connections/Licenses:

[Sign Up For / Enable LawToolBox](#)



What is LawToolBox

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

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

- 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 to avoid 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](#)

File Manager Contact Manager Conflict Search New File New Contact New Group Contact

1-1 ▶ 123-456-7890 Bartlett, John; Bartlettss Co
▶ lawrence.beharry@soluno.legal 123 Main Street, Suite 300, Toronto, Ontario, M2M 2M2
Doug Dagworthy/MM/MM John Bartlett - House purchase - 123 Main Street
Counseling

General Ledger NetDocuments

Open Date Area of Practice Default Task Responsible Rate Group
Mar 1, 2016 cou bw DD standard

Description (appears on invoices)
John Bartlett - House purchase - 123 Main Street

[Open Matter In LawToolBox](#)

▶ File Staff

▶ Billing Settings

File Manager Contact Manager Conflict Search New File New Contact New Group Contact

2-1 ▶ +27 31 251-1778 Cappello, Jack
▶ Jack.Cappello@jackandcappello.co.za 456 East Street, Apt 1001, Durban, KwaZulu-Natal, 4001
Doug Dagworthy Bankruptcy Jack Cappello - General Matter

General Ledger Net Documents Deadlines (LawToolBox)

netdocuments






Username

Password



ndMail™



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 > Matter_Sale_Trust_v2 >

GOVEYANCE

Title Search

Details

Property

Sellers

Buyers

Payouts

Accounts

Debit/Credit

Documents

Web Filing

Trust

Trust

Save

Description	Payee	Account	Date	Funds In	Funds Out
Funds Received from Jim Maccotte Law Corporation			2022-01-01	\$578,871.23	
Pay out of Royal Bank of Canada Mortgage as at April 05, 2022 with a per diem of \$15.50			2022-01-01		\$216,922.76
Transfer proceeds to purchase file #F34675			2022-01-01		\$164,823.76
Holdback pending receipt of Final Meter Reading bill from City of New Westminister			2022-01-01		\$500.00
Payment of Account of Mark Mickelson Law Corporation			2022-01-01		\$561.36
Legal fees for Sale transaction			2022-01-01	\$895.00	
Disbursements			2022-01-01	\$444.77	
Other Charges			2022-01-01	\$0.00	
GST and PST			2022-01-01	\$130.05	
Total Account			2022-01-01	\$1,469.82	\$1,469.82
Funds paid to Andy Robinson			2022-01-01		\$194,593.54
Totals				\$578.8	

aharhosseini, 1 version 1d 100% + Totals \$578.8 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

LAWPAY®

 Worldox®

 fattmerchant

 CASEpeer



Office 365

gravity
PAYMENTS

nd
netdocuments®

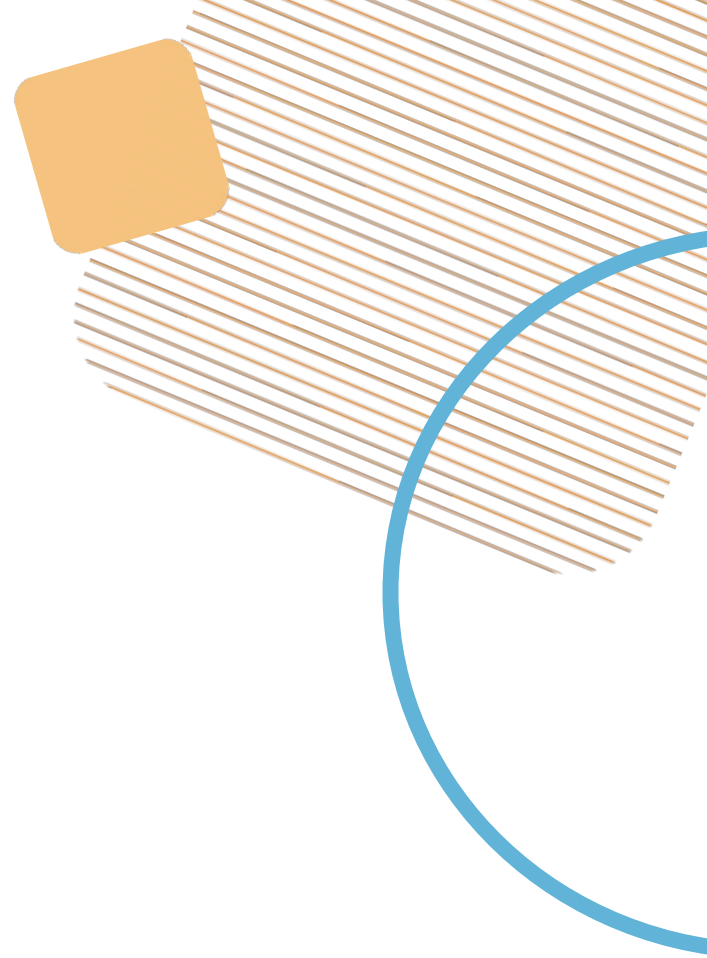
YoCierge
Legal Technology


LAWGRO


PaperCut.



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 than 15 minutes ago	
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	AT	AT
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	AT	AT
Bartlett, John		Bartlett, John	
123 Main Street, Suite 300		123 Main Street, Suite 300	

Labels Generated less than 15 minutes ago Export to:  

MATTER: 1-10 CLIENT: 1 OPENING DATE: 2020-01-02 

NAME: **Bartlett, John**

ATTENTION:

ADDRESS: 123 Main Street
Suite 300
Toronto, Ontario M2M 2M2

RE: test

Home : 123-456-7890
Fax : 555-555-5555
Work Mobile : 905-555-3214
Work : 416-555-9874
Home email : james.harris@soluno.legal
Other email : diane.lowery@soluno.legal

Assigned Alan Tuback Responsible Alan Tuback



Quick Keys Examples

When doing time entries or transaction

Date Control

+ - Increment date

* Today's date

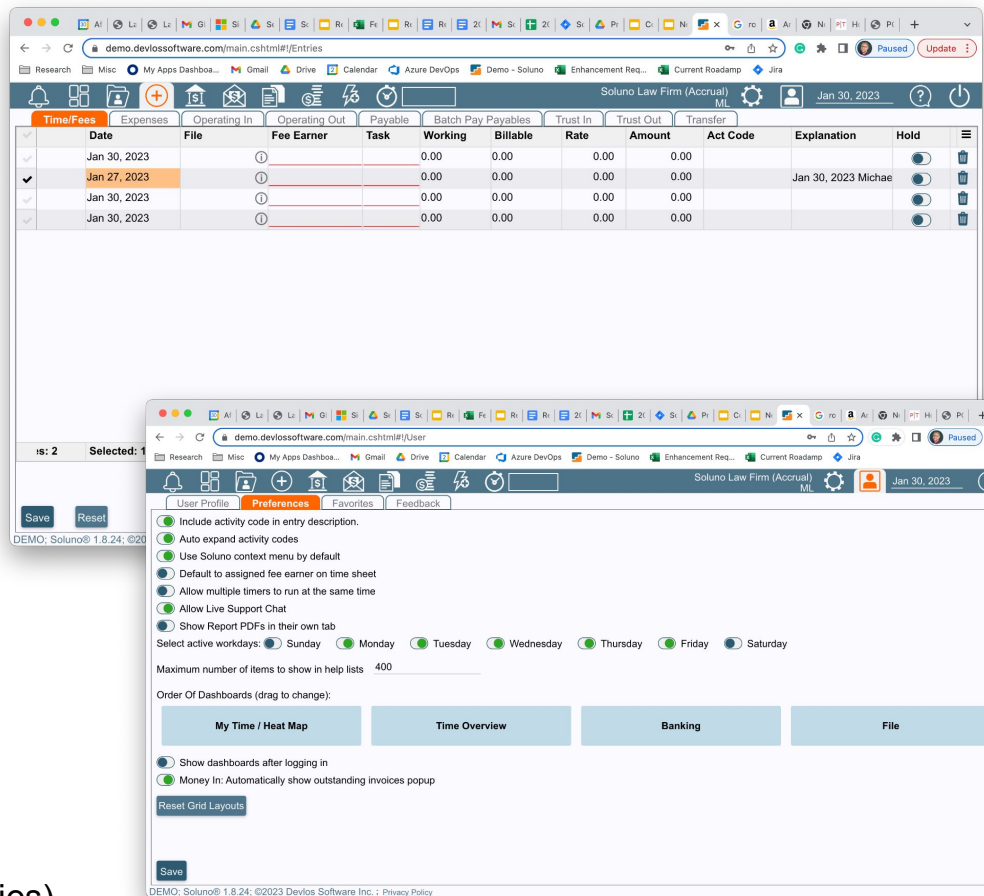
Explanation

/d Today's Date

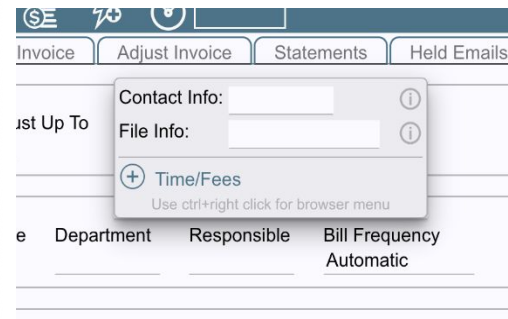
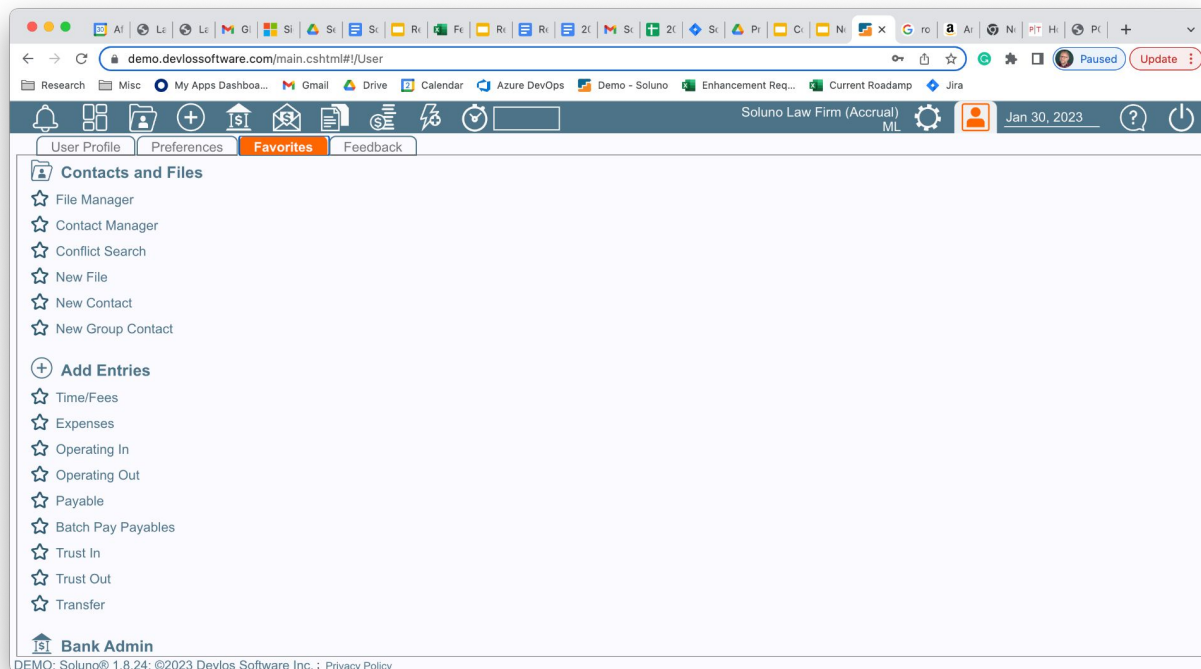
/u Your initials

/f Your Full Name

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



Favorites



Coming this Quarter



Billing Realization

Client	Name	Resp	Law	Wkg	Time		Fee		%	Effective
Matter	Description	Lwyr	Type	Lwyr	Hours	Value	Adjustments	Billed	Realized	Rate / Hr
1	1, Matter									
0001	MATTER 1: Davis, Ben re Bankruptcy	TD	bank	TD	1.00	550.00	0.00	550.00	100.00%	550.00
	Matter Total				1.00	550.00	0.00	550.00	100.00%	550.00
1	1, Matter									
0001A	MATTER 0001A: CASE, Counselling Ser	TD	cou	TD	20.00	2000.00	0.00	2000.00	100.00%	100.00
	Matter Total				20.00	2000.00	0.00	2000.00	100.00%	100.00
2	2, Matter									
0002	MATTER 2: FLYNN, George re Business	TD	corp	TD	0.10	10.00	5.00	15.00	150.00%	150.00
	Matter Total				0.10	10.00	5.00	15.00	150.00%	150.00
3	3, Matter									
0003	MATTER 3: SMITH, John vs. Rusty Pro	TD	lit	TD2	1.50	225.00	0.00	225.00	100.00%	150.00
	Matter Total				1.50	225.00	0.00	225.00	100.00%	150.00
4	4, Matter									
0004	MATTER 4: FLINSTONE, Fredrick re Dr	TD	est	TD	0.00	400.00	0.00	400.00	100.00%	
	Matter Total				0.00	400.00	0.00	400.00	100.00%	
	FIRM TOTAL				22.60	3185.00	5.00	3190.00	100.16%	141.15
*** Summary by Working Lawyer ***										
TD	Tooba Dawood				21.10	2960.00	5.00	2965.00	100.17%	140.52
TD2	Tooba Dawood 2				1.50	225.00	0.00	225.00	100.00%	150.00
	Total:				22.60	3185.00	5.00	3190.00	100.16%	141.15
*** Summary by Responsible Lawyer ***										
TD	Tooba Dawood				22.60	3185.00	5.00	3190.00	100.16%	141.15
	Total:				22.60	3185.00	5.00	3190.00	100.16%	141.15
*** Summary by Types of Law ***										
bank	Bankruptcy				1.00	550.00	0.00	550.00	100.00%	550.00
corp	General Corporate				0.10	10.00	5.00	15.00	150.00%	150.00
cou	Counseling				20.00	2000.00	0.00	2000.00	100.00%	100.00
est	Wills/Estates/Trusts				0.00	400.00	0.00	400.00	100.00%	
lit	Litigation				1.50	225.00	0.00	225.00	100.00%	150.00
	-----				22.60	3185.00	5.00	3190.00	100.16%	141.15

These sections will break down the above-mentioned information by **summary** of **working/responsible** lawyer and **types of law**.



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

Validate

File Staff

	User	Full Name	Fee Earning	Fee Alloc. % for G/L	Introducing %	Billing Order	Note ...
Responsible	AT	Alan Tuback	✓		100	1	
Assigned	AT				0		
Lead	AT						

Soluno Law Firm (Accrual) MI Jan 30, 2023

Select Charges

Client Name
1 Bartlett, John; Bartlett's Co

File Description
1-12 TEST Casefile

Expand All

Time	\$0.00
Expense	\$0.00
Retainer	\$1,000.00
Receipts and Trust Up To Jan 24, 2023 * Changing this date will recalculate the Trust and Balance Forward information	
Trust	\$104.35
Balance Forward	\$452.00

Ok

Send to Release

Send Test Email



Upcoming 2023



Key Goals of 2023

- **Highest**

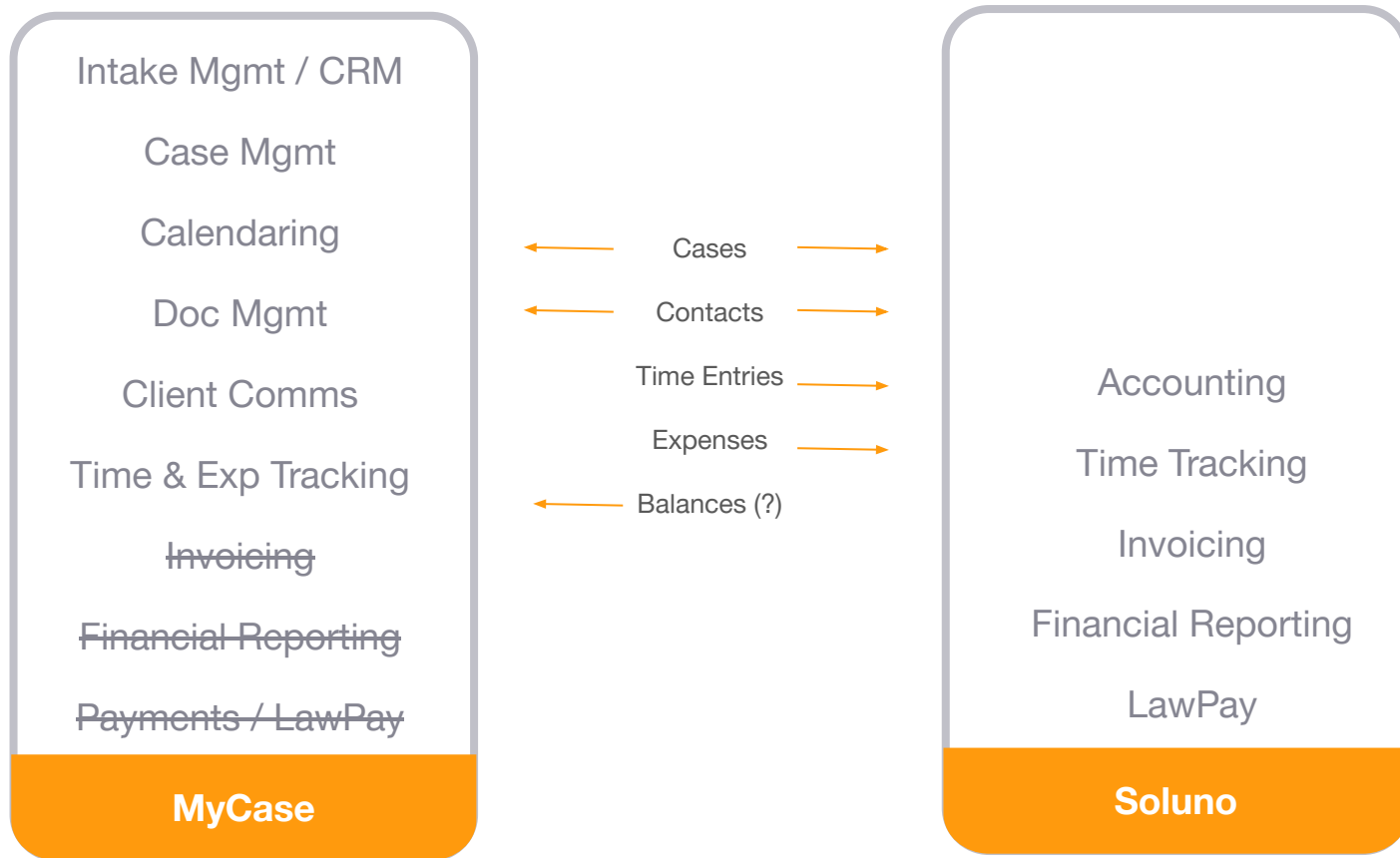
- Report Additions
- Reallocation of Fees at Billing
- Recurring Transactions / Memorized
- Finish Simple Interest

- **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





Thank You

