Quick Start Guide

Quick Setup
Add Your First Client & Case
Track Time & Get Paid
Bonus Setup Tips
Additional Resources For Your Business
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Introduction

Congratulations on starting your MyCase trial! We understand that as a legal professional, time really does equal money – that’s why we created this guide to help you get started as efficiently as possible. You may use this resource as your go-to handbook for getting up and running with MyCase in no time.

If you need any additional help please do not hesitate to call us at (800) 571-8062, email us at trialsupport@mycase.com, or visit our Knowledge Center online.

Quick tip for reading this guide
All core MyCase features are accessible via the homepage dashboard, feature tabs, and Add Item menu. In this guide we will default to the **Add Item** menu in the how-to steps.
PART 1: Quick Setup

Add Firm Users

Firm Users are the individual attorneys, paralegals, and administrative staff who have their own username and password for accessing your firm’s MyCase account.

To invite Firm Users:

- Click on your name next to the search box
- In the dropdown click **Settings**
- On the left side of the screen, click **Firm Users**
- Below that, click **Attorneys & Staff**
- On the right side of the screen, click the **New User** button

- Enter the contact information for the person you’d like to add in the Add Firm User form that appears
- Complete by clicking **Add Firm User**

**Congrats** – you’ve just added a new user! This person will receive a welcome email from MyCase with instructions for activating their new account.
Create Custom Fields

MyCase allows you to create custom fields so you can keep track of important information beyond standard case, contact, and company fields. For example, you can add a case field called “Jurisdiction” to enter the jurisdiction information or a contact field called “Spouse’s Name” to remember your client’s husband or wife. Setting this up now will ensure you collect all the necessary information when adding cases and contacts.

To create a custom field:

- Click on your name next to the search box
- In the dropdown, select Settings
- Click Custom Fields
- Click the type of custom field you want to add: Cases/Matters, Time & Expenses, Contacts, Companies
- Click the Add Custom Field button on the right side of the screen and fill in the requested information

Your custom field will now show up under the appropriate list.

Congrats, you’ve completed your quick setup!
PART 2: Add Your First Client & Case

Add Your First Client Contact

To add a client:

• From the Add Item menu, click **Add Contact**
• Select **Individual**
• Enter all of the contact information for the individual in the Add Contact window

Give Access To Your Clients

If you choose to give access to your contacts you will need to specify a field called **MyCase Access**. Your clients will not be able to view anything unless you specifically share it with them.
Add Your First Case

To add a case:

‣ From the Add Item menu, click **Add Case**
‣ Enter the general case information
‣ Link any of your internal staff you would like associated with the case
‣ Then link any clients or contacts that should be associated with your case
‣ Lastly, set your billing preferences for the case/matter

**Helpful Hint**

The case billing contact will be the person or entity receiving the invoice and paying for it. This can be a client, company, or third party depending on your case/matter.

**Case Best Practices**

‣ When creating a Case Name, use something descriptive because this is how you, your staff, and any clients you link will identify the case/matter through the entire system

‣ A Case Number can be any number you want to associate with the case or matter. Examples of useful numbers include court assigned numbers, internal ID codes, etc.

‣ The Case Description is for internal use only and will never be shared with clients or contacts even if they are linked to the case
PART 3: Track Time & Get Paid

Tracking Time & Expenses

To create a new time entry:

- Click **New Time Entry** in the Add Item menu
- Fill out the New Time Entry form that appears

*You can also use the timer feature located in the app bar at the bottom of your screen.*

To create a new expense entry:

- Click **New Expense** in the Add Item menu
- Fill out the New Expense form that appears
Set Up Trust Accounts

To deposit funds into a client’s trust account:
• Click the Billing Tab
• Then click the icon for Deposit Into Trust
• Select the appropriate contact in the window that appears
• Select your preferred way of making the deposit:
  • Online Payment to run a credit card transaction
  • Offline Payment to record deposits from cash, check, etc.

After selecting your method, enter the correct information and finalize by clicking Deposit Funds.

Invoices

To create a new invoice:
• Select New Invoice in the Add Item menu.
• Select one of the two options that appear:
  • From Open Balances: Displays every client and matter that currently has an open balance to be invoiced
  • From Scratch: Use this option to create ad-hoc invoices for any case/matter in the system
**PayPros Integration**

**To accept online payments with PayPros:**

- Click on your name next to the search box
- In the drop-down select **Settings**
- In the left-hand menu, click on **Firm Settings**
- Click **Setup Online Payments**
- Click on the **Get Started Now** button
- You will be taken to a **Request a PPI account** screen
- Double check your contact information, enter an optional message, and click **Submit**

A PPI representative will contact you to discuss processing rates and get you set up with an account. From there, MyCase will take care of the rest. It’s that simple.
PART 4: Bonus Setup Tips

Sync Your Calendar

Your MyCase calendar can be easily integrated with third party calendaring software such as Gmail, Outlook and more!

To sync with Google Calendar:
• Click on your name next to the search box
• In the dropdown menu, select App Bar
• Click Install Now on the Google Sync App

• MyCase will warn you that you’re about to be redirected to Google, click Proceed
• If you are already signed in click Allow Access on the Google prompt, if not, log in first
• You will be taken back to MyCase and presented with a Google Sync Settings window. Adjust the settings based on your preferences
• Once complete, Save Settings and your Google Calendar will be successfully linked to your MyCase account

Not A Google Calendar User?

Because there are so many calendar options we recommend you visit the Knowledge Center at support.mycase.com to get the sync instructions for your preferred calendar program.
Integrate Your Email

Each user at your law firm has a unique email forwarding address that is assigned to them. They can then forward incoming and outgoing emails to that unique address and the emails will be copied into MyCase to be assigned to their appropriate cases and contacts.

To set up your email integration:
- In the dock at the bottom of your screen, click on Email Integration
- Click Settings
- Highlight and copy the address in the Your MyCase Email field - this is what you will use to send or forward email messages into MyCase
- Create a contact in your email program by opening your email program (Outlook, Gmail, Mail, etc.) and creating a new contact – paste the email address into the email field

Helpful Hint
When you name the contact in your email program, we suggest something like “MyCase Dropbox” or “MyCase Email.” This way when you are forwarding a message into MyCase, you can simply type the name of the contact instead of having to remember the unique address.

Automate Your Documents

MyCase has some great tools to take the menial work out of document assembly. With your subscription you can create document templates, then merge those templates with information stored in the software – with the click of a button.

There are three major features that make up Document Automation:
- **Merge Fields:** Mycase lets you specify which fields are being used in the document automation process – including custom fields.
- **MyCase Draft:** A web-based word processor that lets you create and edit documents, right within the system.
- **Microsoft Word Templates:** Create document templates in Microsoft Word, then upload them into MyCase. You can then merge those template with information you’ve stored within MyCase.

For more details about using MyCase document features, visit the MyCase Knowledge Center (support.mycase.com).
Set Up User Permissions

A firm’s Master User and Admin Users have the ability to restrict access to the different features of MyCase on a per-user basis. This is useful for situations such as hiding time & billing from lower-level staff, restricting someone’s ability to delete items from MyCase, and allowing someone to view all cases in the system, or only those they are linked to.

To edit user permissions:

- Click on your name next to the search box
- In the dropdown, select **Settings**
- Then click Firm Users and then **Attorneys & Staff**
- Find the user you want to edit permissions for, then click **Edit User Permissions** next to their name. The permissions settings will be revealed

Access Permissions: Each major feature can be set to Add & Edit, View Only, or Hidden.

User Permission Types

- **Add & Edit:** Gives user full access to add and edit items related to the feature
- **View Only:** User can view items related to the feature, but cannot add or edit them
- **Hidden:** The feature will be completely removed from the user’s MyCase account. It will be as if the feature was never available to them in the first place
- **Additional Permissions:** You can specify additional administrative permissions – access data from every case in the system or only those (s)he is linked to

Helpful Hint

To link a user to all cases and corresponding events:

- Click on the user’s name you want to link cases to
- Then click on the Case Link tab
- Click the Link to All Active Cases button
- Select whether or not you want to add all existing case events to user’s calendar
- Complete by clicking Link to Cases
PART 5:
Additional Resources For Your Business

QuickBooks Integration

We know accurate accounting is crucial – that’s why we created a 1-click sync with QuickBooks to help ease your financial reporting woes.

Getting started with the QuickBooks Integration is easy. Simply schedule an online appointment with a MyCase support representative at https://www.timetrade.com/book/2GPSJ for a 30-minute appointment to map your MyCase accounts to their respective income and expense accounts in QuickBooks. From there, you’ll be synchronizing billing information between MyCase and QuickBooks with just the click of a button.

Please Note: You must be a paid MyCase subscriber to utilize this feature and have a QuickBooks PC or QuickBooks Online account. The MyCase QuickBooks Integration is only eligible for U.S. versions of QuickBooks. There is a one-time setup fee of $99 due at the completion of the implementation, after that, ongoing support is included free of charge. The QuickBooks Integration is not required for acquiring a MyCase account.

MyCase Websites

Join hundreds of attorneys who are using MyCase Websites to modernize their practice. You can select from a variety of professional and modern law firm website design options to stand out from the crowd. Plus, you’ll get full integration with MyCase, including direct login access for you and your clients.

MyCase Websites include the following:

- A modern, professional website built for your firm
- Complete integration with MyCase software
- Basic Search Engine Optimization (SEO)
- Responsive website design (looks great on all mobile devices)
- Dedicated blog for your firm
- Social media integration
- Google Analytics account
- Hosting and domain transfer options

To take advantage of a modern, professional, and MyCase integrated website there is a one-time set up fee of $995 and a monthly service fee of $50 for ongoing site maintenance and support.

MyCase Websites are available to MyCase practice management software subscribers only, however, you do not need a MyCase Website to acquire a MyCase account.