An Epoq Company

DIRECTLAW™

Virtual Lawyering Made Simple™

Using DirectLaw’s Virtual Law Firm Platform

Virtual Lawyering Made Easy™

* ATTORNEY GUIDE*

Version 2.0
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INTRODUCTION

THIS STEP-BY-STEP USER GUIDE EXPLAINS THE FUNCTIONALITIES OF YOUR DIRECTLAW VIRTUAL LAW FIRM PLATFORM WITH AN ATTORNEY'S PERSPECTIVE AND GOALS IN MIND. THE GOAL IS TO ASSIST YOU IN USING DIRECTLAW'S VIRTUAL LAW FIRM PLATFORM TO EXPAND YOUR PRACTICE BY CAPTURING PROSPECTIVE CLIENTS WHO ARE SEARCHING FOR EASY-TO-USE, INTERNET-BASED LEGAL SERVICES.

IN ADDITION TO ATTRACTING NEW CLIENTS, DIRECTLAW'S VIRTUAL LAW FIRM PLATFORM IS ALSO DESIGNED TO ENHANCE THE QUALITY OF SERVICE FOR EXISTING CLIENTS BY ENABLING ONLINE CONTACT, COMMUNICATION, AND THE EFFICIENT PRODUCTION OF LEGAL DOCUMENTS.

Advantages of DirectLaw™ over Traditional Law Practice

- Serve a greater number of clients with quality services at reasonable fees
- Fixed pricing strategy offers the advantage of economies of scale
- Increased geographic market reach through an online delivery system
- Ability to capture "latent market for legal services"
- Increased staff productivity by decreasing time spent on client intake meetings
- Greater flexibility–review client questionnaires, communicate with clients and/or deliver documents any time of day or night
- More uniform and consistent data input by clients, staff, and attorneys
- Increased quality control over documents
- Ease of use—no programming or formatting
- Online and offline training support is provided

This manual's plain-language and detailed step-by-step sequence will assist you in taking full advantage of the system's benefits from the outset.

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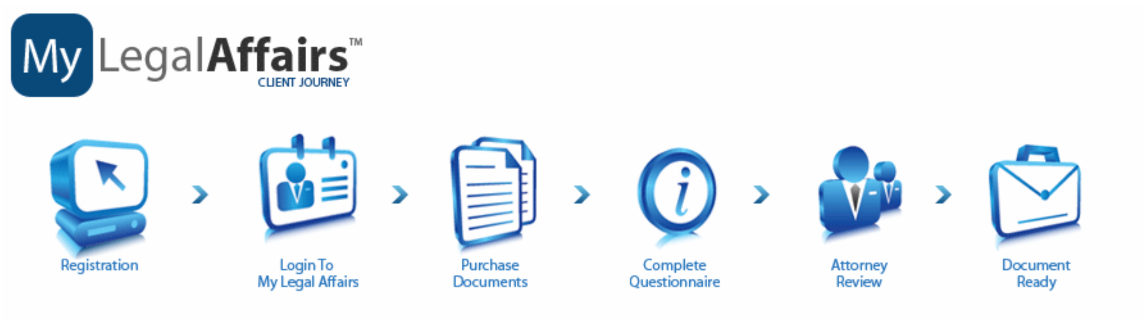
The Client Journey

Congratulations! A potential client has found your web site and has decided to use your firm to solve a legal problem or meet a legal need.

Now…here's what happens next (when a client selects an Attorney Prepared Legal Document):



1. Registration at Firm Site.
2. Login to MyLegalAffairs™ web space
3. Select document and purchase via credit card online
4. Access, Complete and Submit the online Questionnaire(s)
5. Attorney Review (communicate/clarify with client if necessary)
6. Upload of Client's completed documents to MyLegalAffairs™ web space (client notified via e-mail).

Each client's MyLegalAffairs™ web space ("client space") contains other interactive features, such as: the ability to purchase legal advice services when needed; communicate & share files with the firm (Collaboration); obtain info on upcoming dates/events; update personal information; and pay Legal Invoices via online credit card payment.

IMPORTANT NOTE! Prospective clients accept the terms and conditions of the firm's Limited Services Agreement during the registration process. A conflict of interests check must be conducted prior to the delivery of legal services. The parties' name(s) is/are used as the basis for the conflicts check. The firm must cross-check its own database/list of all clients to determine if any conflicts exist. If a conflict exists, a refund will be promptly issued.

Using the Administrative Area ("Attorney Dashboard")

All client data, client-attorney communications, and e-commerce functions (refunds, pricing, doc/service selections, etc.) are accessed and managed through your Administrative Area ("Attorney Dashboard".)

The link and username/password to access your Attorney Dashboard are provided by DirectLaw™ following the launch of your platform. Your Attorney Dashboard is also easily accessible via the **Admin** link in the footer of your DirectLaw™ platform. Simply scroll to the bottom of any page on your DirectLaw platform and click on the **Admin** link.

The Attorney Dashboard Functionality:

1) Retrieve/download client Questionnaires (documents) for review;
2) Manage your **Legal Advice** and **Legal & Court Coaching** clients' information, questions and your responses;
3) Manage your **Legal Document Review Service** clients and associated documents;
4) **Customize Store** – set pricing, select document and service offerings, etc.;
5) Retrieve client information (name, account info, e-mail, etc.) – **Client Admin**;
6) **Communicate** & **Share Files** with clients;
7) Post events (such as phone calls, important dates, etc.) on a clients' **Calendar** tab;
8) Review web sales based on defined timeframes (i.e., sales for July 2008) process refunds, etc. (**Transactions** tab); and
9) Manage and update your DirectLaw™ platform account information (username, password, address, etc.) – the **My Account** tab.
10) Upload **Legal Invoices** to client accounts for payment via credit card online.

The following sections will provide specific information on how to use the functionality listed above.

Retrieve and Download Client Questionnaires (Documents)

Following purchase at the firm's web site, the client accesses the Questionnaire(s) via the MyLegalAffairs™ web space.

The client "Questionnaire" is, in effect, the actual document (in Rapdiocs format). Within the client-facing MyLegalAffairs™ web space, the document is presented to the client as a Questionnaire. Only the questions and associated explanation boxes are presented to the client – the assembly of the actual document(s) has been suppressed.

After completion, the client submits the Questionnaire(s) and a Questionnaire submission notification is provided via e-mail to the attorney (or other designated firm staff member).

The attorney or other firm staff member retrieves/downloads the Questionnaire (document) for review, editing if needed, and eventual upload to the client's MyLegalAffairs™ web space, as follows:

1. Log into your Attorney Dashboard.

2. Click on the **Document Preparation** tab. Typically the page will default to this section upon login.

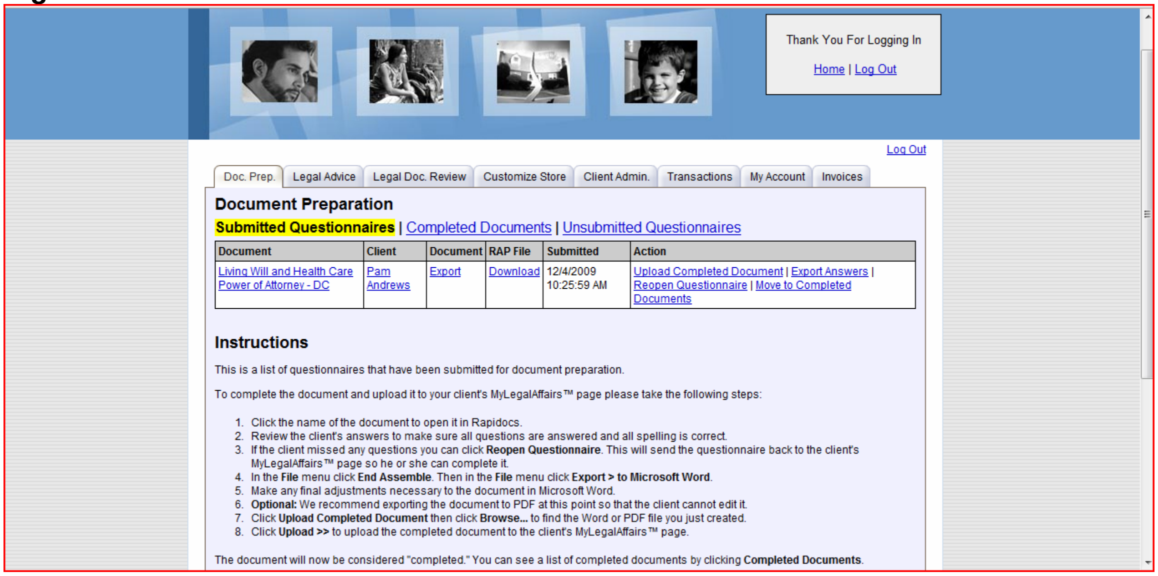
3. Below the heading "**Document,**" a list of document names will appear and represent each client's submitted Questionnaire(s.) The documents are listed in subject-area groups (i.e., divorce; wills, etc.) If a client has purchased more than one document, scroll through the list of document names to locate all Questionnaires associated with a particular client. The client's name and information on the date/time when the Questionnaire was submitted is listed to the right of each document name.

4. The options listed under "**Action**" allow the attorney or staff member to **Upload** a **Completed Document** to the client's MyLegalAffairs™ web space or **Reopen** a **Questionnaire** that is either incomplete or needs to be reviewed/edited by the client in order to finalize the client's documents.

   Use of the **Reopen Questionnaire** link will return a Questionnaire to the client's MyLegalAffairs™ web space. Notify the client that this action has been taken; request that the client return to the account to review/edit the Questionnaire; save all responses; and re-submit the Questionnaire(s) to continue the progress on the document(s).

5. Please also refer to the on-screen **Instructions** with the **Document Preparation** tab for additional details on downloading, reviewing/editing, completing and uploading documents to the client's MyLegalAffairs™ web space. (See: Figure 1.0)

Figure 1.0



Manage Your Legal Advice and Legal/Court Coaching Clients

The *DirectLaw™ Virtual Law Firm Platform* enables the sale of legal advice via three (3) delivery methods: (1) telephone, (2) e-mail and/or (3) web cam.

The platform also enables you to offer Legal & Court Coaching Services.

Prospective clients select these services from your main MyLegalAffairs™ menu of services. A registered client may also select any of these services from within their MyLegalAffairs™ web space.

After purchase, a Legal Advice by Phone or Web Cam client schedules a date/time to speak with the attorney by phone. Similarly, after purchase, a Legal Advice E-mail client sends a question via e-mail to the attorney.

In either situation, the attorney responds in a reasonable amount of time, for example, within 24-48 hours of receipt of an e-mail legal advice question. Information regarding response times for Legal Advice clients should be clearly explained and posted on your web site.

Legal Advice Purchases –Info and Functions

The **Legal Advice** tab contains links/sections for each type of Legal Advice service you are offering. The Legal Advice tab allows you to manage each advice purchase and mark it as completed when the client's matter/question has been resolved/answered. (See: Figure 2.0)

Figure 2.0

A **Reference Number** is assigned to every Legal Advice Phone Call, Legal Advice E-mail and Legal Advice Web Cam purchase. The client name (**User**), date/time of purchase (**Purchased**) and **Action** (or status) is found within the Legal Advice tab. (See: Figure 3.0)

Figure 3.0

Legal Advice by Phone Call

After completion of a phone call/consultation, the firm may record summary notes by using the **Notes** link within the Legal Advice > Incomplete Calls section. The notes are only viewable by the firm/attorney.

When a Legal Advice Phone Call client has been contacted and the order is considered complete, use the **Change Status to Completed** link to move the client to the Completed Calls section.

NOTE: This action is not permanent. If at a later time it is necessary to re-open the client record, simply go to the Completed Calls section and select the **Change Status to Incomplete** link.

Legal Advice by E-mail

Communicate with Legal Advice E-mail clients by using the **Open** link within the Legal Advice > Incomplete E-mails section. A separate window will open and will display all communications between the attorney and client.

When a Legal Advice E-mail client order is considered complete, use the **Change Status to Completed** link to move the client to the Completed E-mails section.

NOTE: This action is not permanent. If at a later time it is necessary to re-open the client record, simply go to the Completed E-mails section and select the **Change Status to Incomplete** link.

Legal Advice by Web Cam

Legal Advice Web Cam purchases are managed within the Legal Advice tab. After completion of a web cam consultation, the firm may record Notes by using the **Open** link within the Legal Advice > Incomplete Legal Advice by Web Cam section.

When a Legal Advice Web Cam client order is considered complete, use the **Change Status to Completed** link to move the client to the Completed E-mails section.

NOTE: This action is not permanent. If at a later time it is necessary to re-open the client record, simply go to the Completed E-mails section and select the **Change Status to Incomplete** link.

Legal & Court Coaching

Communicate with Legal & Court Coaching clients by using the **Open** link within the Legal Advice > Incomplete Legal & Court Coaching section. A separate window will open and will display all communications between the attorney and client.

When a Legal & Court Coaching client order is considered complete, use the **Change Status to Completed** link to move the client to the Completed Legal & Court Coaching section.

NOTE: This action is not permanent. If at a later time it is necessary to re-open the client record, simply go to the Completed E-mails section and select the **Change Status to Incomplete** link.

Legal Document Review Service

Your *DirectLaw™ Virtual Law Firm Platform* enables you to also offer a Legal Document Review Service. This interactive service is priced on a case-by-case basis. Use this functionality to review a previously prepared document for a fee.

Example: A client has existing will documents prepared by another attorney and/or purchased from an online legal forms company. The client's situation has changed and (s)he is seeking legal advice to determine if the will is still valid or if changes are warranted.

After registering for the Legal Document Review Service, the client uploads their existing document to the firm via. If the document is not available in electronic format, the client could also fax the document for review. In either case, the purchase of the Legal Document Review Service may be made via online purchase.

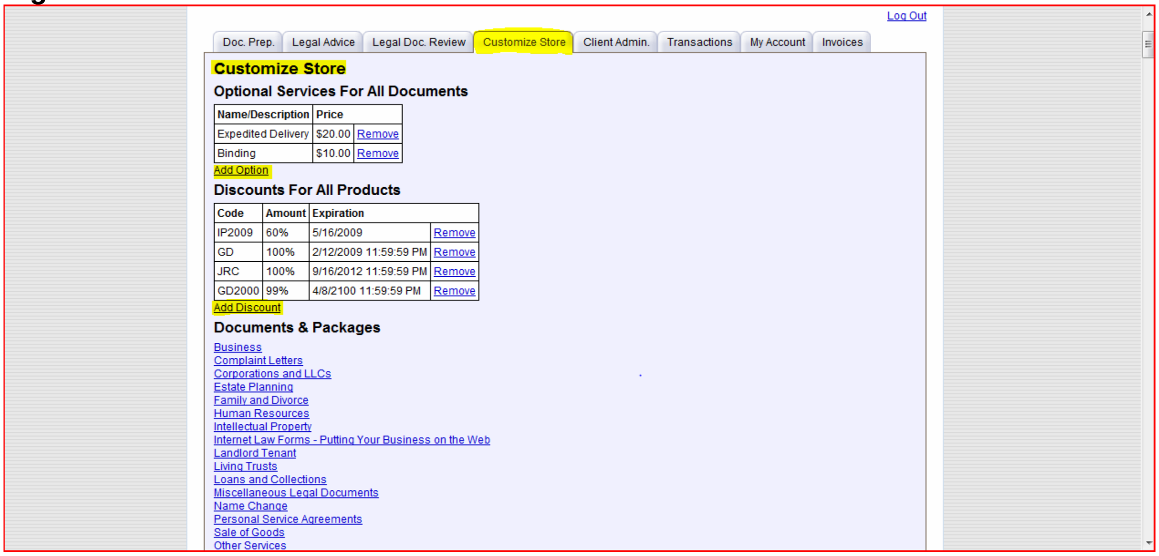
Use your DirectLaw™ interactive communication tools on the Attorney Dashboard to upload a revised version of the legal document and/or provide feedback through the client's MyLegalAffairs™ web space. (See: Figure 4.0).

Figure 4.0

Customize Store

Use this tab to change the documents, services, document delivery options, etc. offered from your firm's web site via the MyLegalAffairs™ web space. (See: Figure 5.0)

Figure 5.0

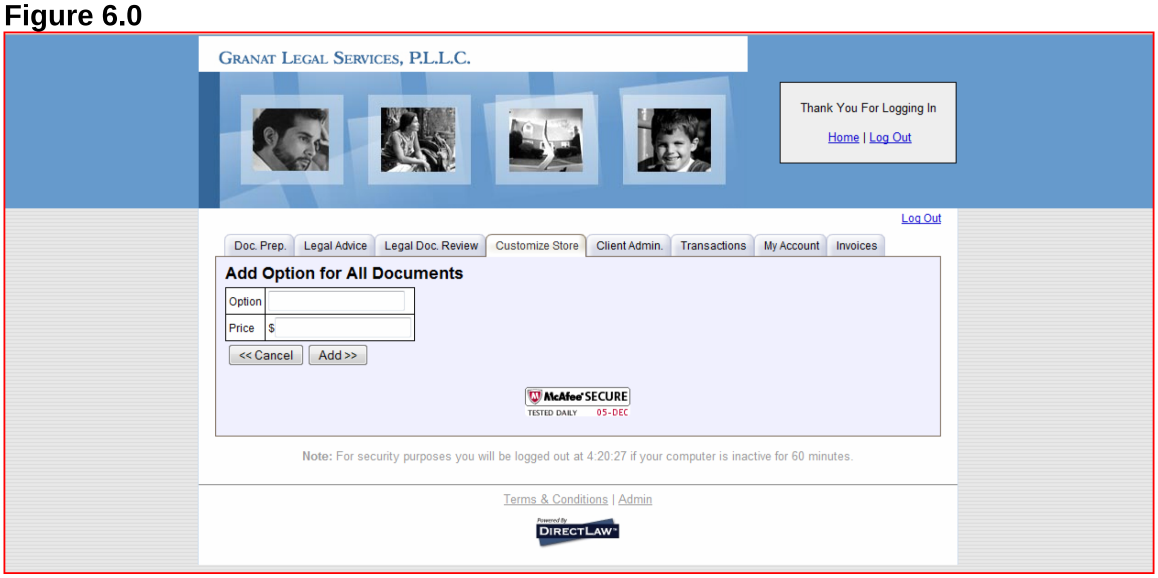


While the functions within this section are relatively self-explanatory, we are providing additional information for reference (if needed).

Options for All Documents – Use the **Add Option** or **Remove** links to add or remove delivery options (such as Expedited Delivery, Paper Document Delivery, etc.) (See: Figure 6.0)

Note that the option added or removed will apply to all documents offered at the firm web site.

Figure 6.0



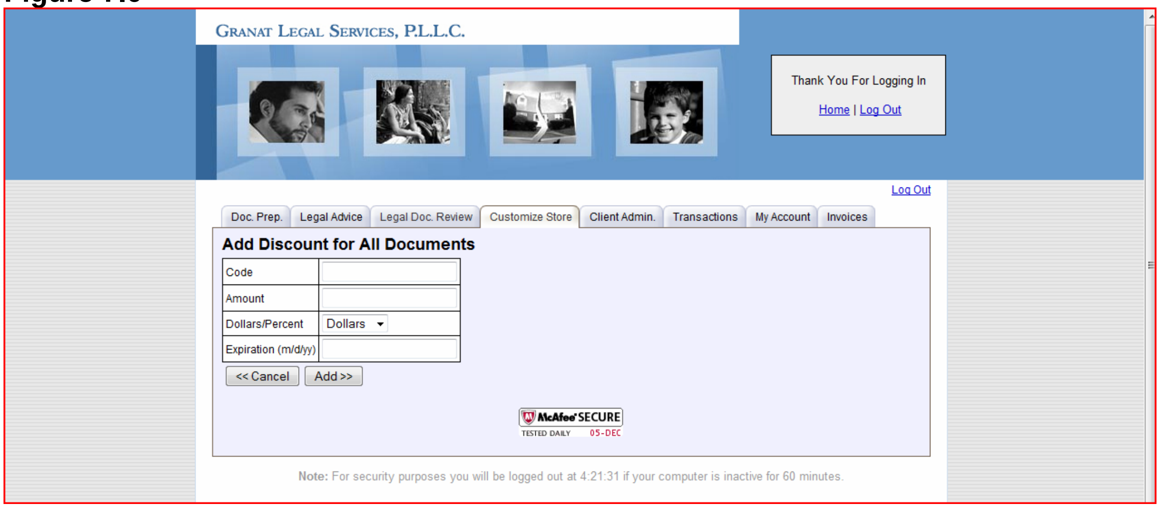
Discounts for All Products - Use the **Add Discount** or **Remove** links in this section to add or remove discounts to ALL products/services offered at the firm web site. (See: Figure 7.0)

NOTE: When a discount code from this section is used by a client, the discount will apply to all documents/services offered at the firm web site. Please use the

Add Discount link provided with the Documents & Packages section (see below) to create a discount/coupon code for individual documents.

You may choose to offer a percentage discount (example: 10%) or a dollar amount (example: $10.00.) Multiple discounts may be entered within this section with a unique code assigned to each and advertised and/or provided to clients for use at the firm's discretion.

Figure 7.0



Documents & Packages – This section lists all documents in the law firm's DirectLaw library that will be sold on the firm's web site. The documents are categorized by document type (i.e., Business, Family Law, Estate Planning, etc.)

To remove a document from the law firm site, simply remove the check from the associated box under "**Offered.**" To add a document to the law firm site, check the associated box and the document will be made available for sale through the MyLegalAffairs™ web space.

> **Preview link** – Use this link to preview/open the document in a web browser window (i.e., Internet Explorer.)
>
> **Download RAP** – Use this link to download the document's associated Rapidocs file to your local computer.
>
> **Add Option** – Use this link to add other services associated with the document. For example, if the firm will file the document on behalf of the client, a Filing Service Fee may be added.
>
> **Add Discount** – Use this link to add a discount (dollar or percentage) to a specific/individual document title. A unique code should be used in conjunction with the creation of this discount.

Pricing -- The price of each document may be established or changed by using the box associated with each document in the **Price** column. Use the **Update** button at the bottom of the screen to save all price changes/additions.

Other Services – Use this section to add, remove, or change pricing for additional services such as Legal Advice Phone, Legal Advice E-mail and/or Legal Document Review.

Client Administration

The **Client Admin** tab (See Figure 8.0) contains:

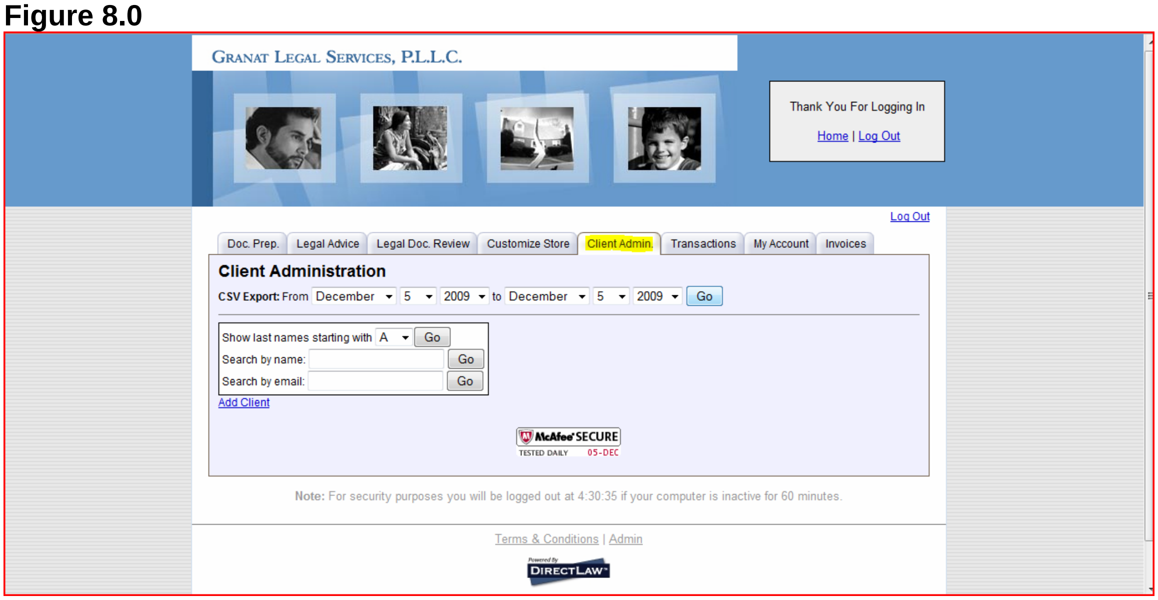
1) Client records and search/locate functions.
2) Export function to allow you to export client data.
3) **Communicate with Us** function (found in the Collaboration Tab in client space).
4) **Share Files** function (found in the Collaboration Tab in client space).
5) **Calendar** functions.
6) Functions associated with DirectLaw™WorkSpace.

To view a list of all clients, select "All" within the "Show names starting with" drop-down menu. Use the "Search by Name" to locate a client by name or the "Search by Email" to locate a client using an e-mail address.

The following client information is contained within this section:

- First Name
- Last Name
- Username
- E-mail address
- Street Address
- City/State/ZIP
- Telephone Number

Figure 8.0



Use the CSV Export function to export client data for a given date range. This data may be used with Microsoft Excel and saved/retained locally by the firm.

Communications -- Initiate or respond to a client communication

1) Locate the client record using any of the search queries.
2) Client on the **View Communications** link to the right of the client record.
3) Enter your new message or reply to a client communication and click on **Submit**.

Share Files – Upload a file to a client's space or retrieve a file uploaded by the client

1) Locate the client record using any of the search queries.
2) Client on the **View Files** link to the right of the client record.
3) Use the **Browse** button to locate the file to be uploaded. Click on **Upload** to send the file to the client's space.

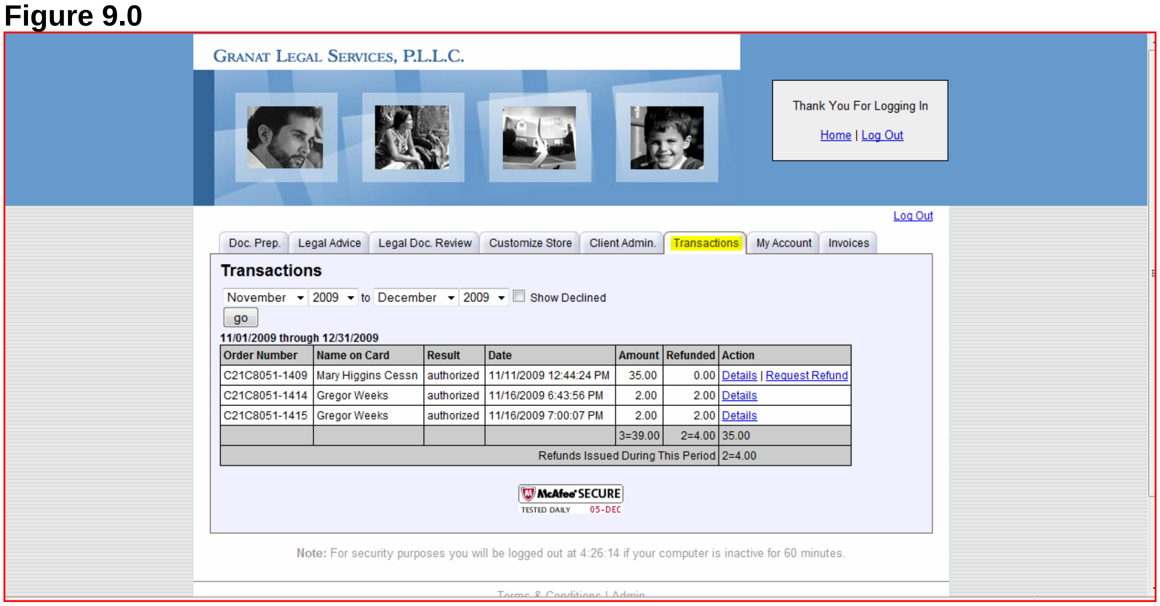
Calendar – Post an event on a client's Calendar Tab and schedule reminders.

1) Locate the client record using any of the search queries.
2) Client on the **Calendar** link to the right of the client record.
3) Click on the **Add Event** link
3) Enter the Description, Start Time and End Time of the event/appointment
4) Schedule a reminder for the Firm and Client if desired
5) Click on **Add**

Transactions

The Transactions section contains information on all sales generated from the law firm's web site through the MyLegalAffairs™ web space. Use the drop-down menus to generate a list of sales for any given time period (i.e., July 2009 to August 2009.) (See: Figure 9.0)

Figure 9.0



The **Details** link provides specific information related to the client purchase (i.e., Order Number, Purchase Amount, Transaction Number, Transaction Time, Date of Purchase, etc.)

Refunds – How to Process

Refunds are processed within the **Transactions Tab** as follows:

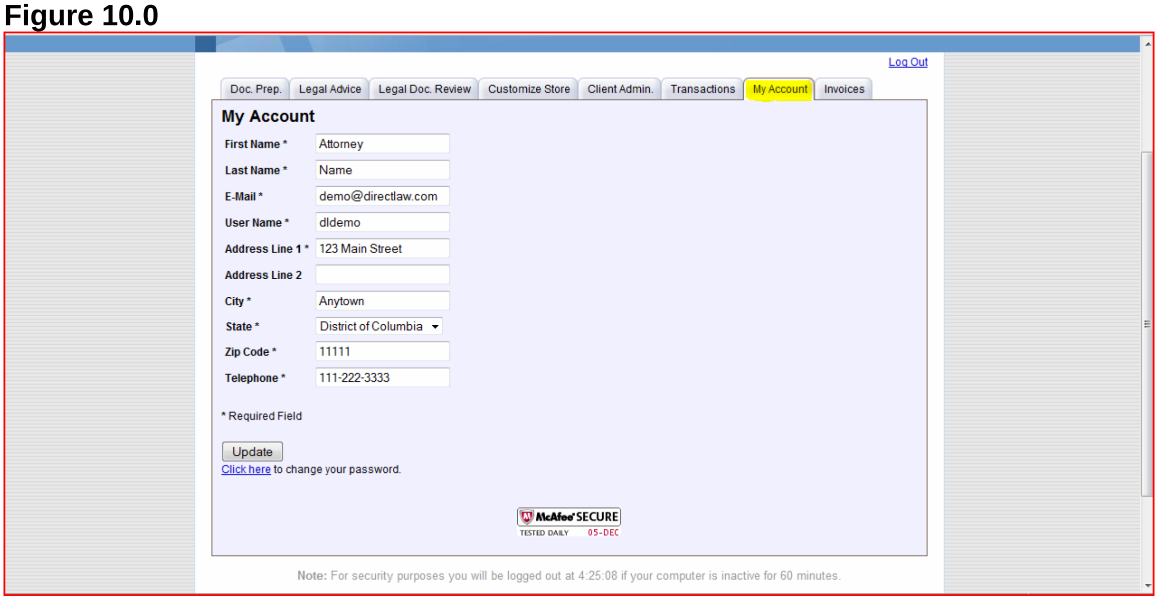
1. Locate the client's transaction (purchase) and click "**Request Refund**"
2. Review the details of the transaction (purchase) and click "**Request Refund**"
3. Confirm that a refund should be processed for this transaction.

An automatic e-mail notification will be generated and sent to DirectLaw, Inc. This notification will include details of the transaction (purchase) and will indicate that a refund has been requested. DirectLaw, Inc. will promptly process all refunds upon receipt. Bi-weekly deposit reports will include details of any refunds processed for the preceeding two weeks.

My Account

This section contains information on the law firm staff member who is logged into the Attorney Dashboard. For example, if John Smith logs into the Attorney Dashboard, John Smith's information (name, address, e-mail, etc.) will appear in this tab. (See: Figure 10.0)

Figure 10.0



Legal Invoices

Use the **Legal Invoices** tab to upload a copy of a legal invoice/bill to a client's space, offering a convenient and easy way to pay invoices via credit card online. NOTE: The invoice should be created within your firm's billing system. The Legal Invoices function is simply a way to upload a copy (preferably in .pdf) for payment online.

1) Click on Legal Invoice > Create New Invoice
2) Select **Yes** if you want to upload a copy – Select **No** if you simply want to post the amount to be paid without an invoice.
3) Use the **Browse** button to locate the client's invoice. Click on **Upload**.

4) Select the Client name and enter the Amount. Enter a description (optional).
5) Use the pre-built notification to notify the client that an invoice was uploaded.

Thank you for choosing DirectLaw! We hope you'll find this Attorney Guide is a useful resource in learning how to use your DirectLaw Virtual Law Firm Platform.

As always, we're here to help if you need it. Please do not hesitate to contact a DirectLaw team member for assistance.

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