

## LEARNING OUTCOMES

By the end of this course participants will be able to:

- \* Start, navigate and generally work with LEAP Cloud
- \* Understand concepts essential to the use of LEAP Cloud
- \* Create new matters and correspondence.
- \* Add and edit information where relevant
- \* Search for precedents and documents
- \* Work with the calendar and tasks and view their integration in Outlook
- \* Record relevant costs and fees to the matter
- \* Create invoices
- \* Generate reports
- \* Navigate confidently around LEAP Cloud
- \* Access the different help and support options available

## PREREQUISITES

It is recommended that participants have basic experience with the underlying operating system, i.e. an ability to navigate the environment using a mouse and keyboard plus an understanding of computer file storage.

## CUSTOMISATION

In addition to our standard courseware, we can adapt course content and flow to your specifications.

## COURSE OUTLINE

### INTRODUCTION

- \* Offline access
- \* Backups
- \* Accessing LEAP

### MATTERS

- \* Create new matter
- \* Matter type
- \* Matter title
- \* Matter details
- \* Staff access control
- \* Custom fields
- \* New client card
- \* Other side card
- \* Other side's solicitor
- \* Adding another party to a matter
- \* Adding another person to a card
- \* Adding a card from database
- \* Removing a card from a matter
- \* New Comment
- \* Matter list
- \* Searching and sorting the matter list
- \* Drop Down Menu
- \* Global Search
- \* Advanced Search
- \* Property Search
- \* Recurring matters

### CORRESPONDENCE

- \* Create letter
- \* LEAP ribbon
- \* Right click functions on saved correspondence
- \* Correspondence - list view, folder view, searching
- \* Emailing through LEAP
- \* Assigning emails to LEAP
- \* Saving attachments
- \* Inbound and Outbound folder
- \* Create Fax, File Note, Memo, Blank Letter
- \* Excel Automation
- \* LEAP Ribbon
- \* Importing Documents
- \* 'Drag and Drop' documents between matters
- \* Scanning Documents
- \* PDF Compiling
- \* Save matter as PDF from Word
- \* Accessing Forms and Precedents
- \* Accessing Practice Guides
- \* Create and modify Precedents

### CALENDAR AND TASKS

- \* Critical Dates
- \* Calendar Appointments
- \* Tasks
- \* Matter Tasks Report

### ACCOUNTING

- \* Time and Fees
- \* Using Timesheet for time and fees (if applicable)
- \* Office Accounting
- \* Office Payments and Debtors
- \* Anticipated Payments
- \* Cost Recoveries
- \* Trust Funds
- \* Explanation of integration with Xero/MYOB
- \* Generating and adjusting invoices
- \* Generating a wordbill

### GENERAL USE

- \* File Menu
- \* Print Cheques
- \* Exit and Sign Out
- \* Information Menu
- \* Matters, Cards, People
- \* Documents (Searching)
- \* Document Register
- \* Legal Rates and Quick Cost Calculation
- \* Search Transactions
- \* Trust Accounting Menu
- \* Office Accounting Menu
- \* Reports Menu
- \* Tools Menu
- \* Mailings
- \* Recurring Matters
- \* Custom Fields
- \* Help Menu
- \* Favourite Matter Types

### HELP AND SUPPORT

- \* LEAP Client Space
- \* Training Videos
- \* Matter Guides
- \* Quick Guides
- \* Legal Guides
- \* LEAP Help (blue question mark)
- \* Help Documentation
- \* Log call online / Live Chat