

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