



# XLN Legal

*Using Today's Technology to  
Your Advantage  
for  
Your Clients*



# Software Customizable for Your Practice & Your Law Firm

- *Utilize a Database Effortlessly*
- *Eliminate or Reduce Paper Files*
- *Take Advantage of Email & Scanned Electronic Documents*



## Built in Security & Accessibility

- *Uses a “My Cloud” Environment*
- *Access your Data & Files from Anywhere over an Internet Connection*
- *Your Information is Safe. XLN Legal uses 256 bit Encryption Technology*



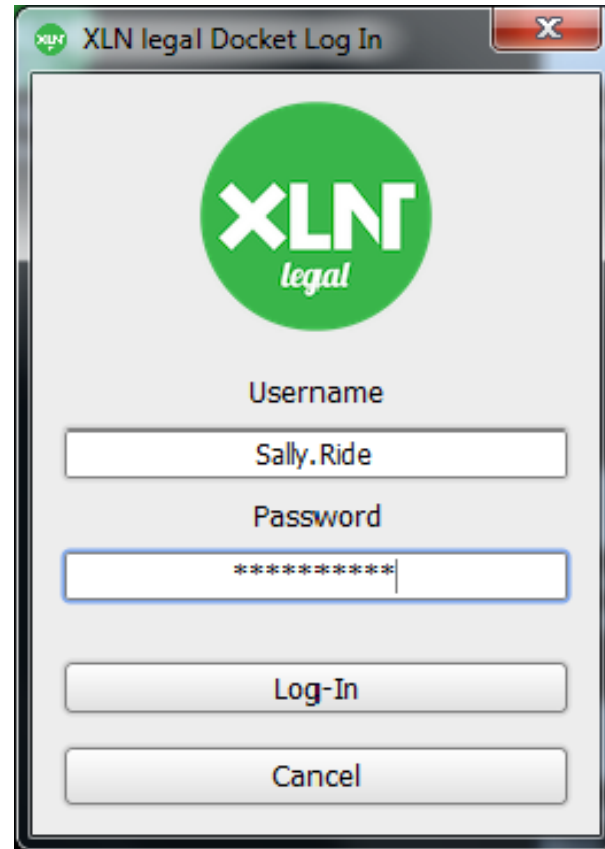
# Solution Differentiators

- Automate Routine Processes
  - Personalize Client Letters
  - Import and Store Important Client Documents
  - Billing - On Demand or Monthly
- XLN Legal is adaptable to your workflow  
Instead of the other way around
  - The workflow engine is flexible to your organization workflow
- Includes an On-Line User Guide

# Log In Screen

Each user of XLN Legal is provided with a unique log in name and password.

Based upon the unique log in name, a user can have one or more, of the assigned privileges (up to 12) provided by XLN Legal.



# Activity Screen

The heart of the system, the Activity Screen shows in chronological order, all the activities applied to the current Matter.

Each activity can be categorized as Billable or Non-Billable.

Client: Sample, John Status: Open  
Phone: (123) 457-8987 Jurisdiction: Franklin County Municipal Court  
Email: John.Sample@AOL.com Judge: Amy Salerno  
Matter: Criminal Defense - 2015-07-09 Case Number: 4000-3000-2000-1000-AAAA

XLN legal

New Matter Incoming Filing Case Information Calendar Task List Deadlines Scratch Pad

Summary Parties Activity Expenses Counsel Letters Client Information CaseNotes

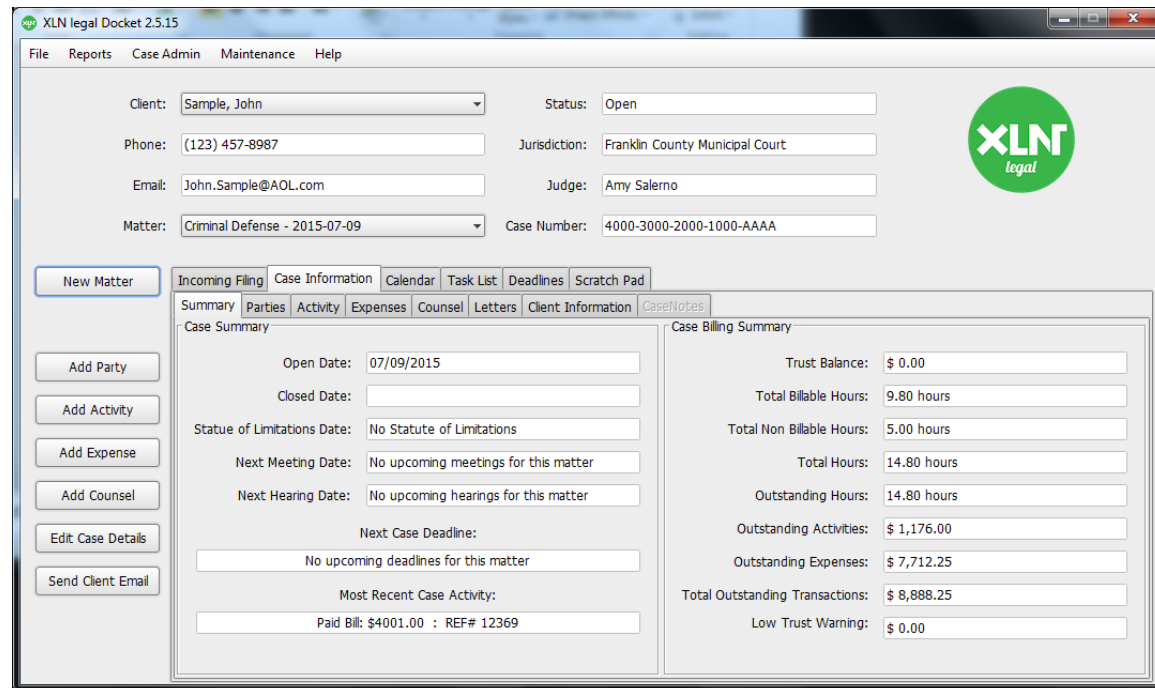
Date	Activity	Hours	Billable	Invoiced	File	Bates #
09/29/2015 04:10 PM	Changed Client Information	-	-	-	-	-
08/14/2015 03:32 PM	Fact Finding on 08/14/2015 10:00 AM	1.0	-	-	-	-
08/14/2015 03:32 PM	Email Sent: Notification of Event From The Dona	-	-	-	Yes	-
08/14/2015 03:30 PM	Discovery on 08/14/2015 9:00 AM	1.0	Yes	-	-	-
08/14/2015 03:30 PM	Email Sent: Notification of Event From The Dona	-	-	-	Yes	-
08/14/2015 03:22 PM	Appeal on 08/14/2015 9:00 AM	1.0	-	-	-	-
08/14/2015 03:22 PM	Email Sent: Notification of Event From The Dona	-	-	-	Yes	-
08/14/2015 03:21 PM	Appeal on 08/14/2015 9:00 AM	1.0	-	-	-	-
08/14/2015 03:21 PM	Email Sent: Notification of Event From The Dona	-	-	-	Yes	-
08/14/2015 02:25 PM	Calendar Event Added: Deposition on 08/14/2015 4:00 PM -	2.0	Yes	-	-	-
08/14/2015 11:28 AM	Calendar Event Added: Appeal on 08/14/2015 3:00 PM -	1.0	-	-	-	-
08/14/2015 11:11 AM	Email Sent: Notification of Event From The Dona	-	-	-	Yes	-
08/14/2015 11:11 AM	Calendar Event Added: Appeal on 08/14/2015 10:00 AM -	1.0	-	-	-	-
08/14/2015 09:53 AM	Generated Pre-Bill	-	-	-	Yes	-
08/13/2015 03:42 PM	Generated Pre-Bill	-	-	-	Yes	-
08/13/2015 01:54 PM	Generated Pre-Bill	-	-	-	Yes	-
08/12/2015 03:54 PM	Changed Client Information	-	-	-	-	-

Add Party  
Add Activity  
Add Expense  
Add Counsel  
Edit Case Details  
Send Client Email  
Search Activities  
Delete

# Summary Screen

The Summary Screen shows pertinent and high level information on the current Matter including up-to-the-minute financials.

This screen also shows the most recent activity and the next deadline needing to be addressed.



# Audit Feature

XLN Legal automatically keeps track of changes to all matters and even the viewing of your matters.

i.e. Who did What to your matter(s) and When it was done.

Management and Auditors can run Audit reports by a User and/or a Date Range.

User Name	Action Date and Time	Action	Client	Matter
Andrew Schmidt	Sep 28, 2015 03:23:04	Edited Case Notes	Charlotte B Buttcroworth	Landlord - Tenant
Andrew Schmidt	Sep 28, 2015 03:23:01	Edited Case Notes	Charlotte B Buttersworth	Landlord - Tenant
Andrew Schmidt	Sep 28, 2015 03:22:45	Loaded Matter: Landlord - Tenant - 2015-07-09	Charlotte B Buttersworth	Landlord - Tenant
Allen Perk	Sep 28, 2015 03:06:35	Viewed Activity: Generated Pre-Bill	Victor Injured Person	Legal Malpractice
Allen Perk	Sep 28, 2015 03:06:31	Viewed Activity: Generated Pre-Bill	Victor Injured-Person	Legal Malpractice
Allen Perk	Sep 20, 2015 03:06:19	Loaded Matter: Legal Malpractice - 2015-07-13	Victor Injured-Person	Legal Malpractice
Allen Perk	Sep 28, 2015 03:06:19	Loaded Client: Injured-Person, Victor	Victor Injured-Person	Landlord - Tenant
Allen Perk	Sep 28, 2015 03:05:38	Viewed Activity: Generated Pre-Bill	Charlotte B Buttcroworth	Landlord - Tenant
Allen Perk	Sep 28, 2015 03:05:16	Viewed Activity: Letter Generated: New Matter	Charlotte B Buttersworth	Landlord - Tenant
Allen Perk	Sep 28, 2015 03:05:13	Loaded Matter: Landlord - Tenant - 2015-07-09	Charlotte B Buttersworth	Landlord - Tenant
Allen Perk	Sep 28, 2015 03:05:13	Loaded Client: Buttersworth, Charlotte	Charlotte B Buttersworth	Criminal Defense
Allen Perk	Sep 28, 2015 03:04:50	Viewed Activity: Email Sent: Notification of Event From The Dnna	John Q Sample	Criminal Defense
Allen Perk	Sep 28, 2015 03:04:42	Loaded Matter: Criminal Defense - 2015-07-09	John Q Sample	Criminal Defense
Allen Perk	Sep 28, 2015 03:04:42	Loaded Client: Sample, John	John Q Sample	Landlord - Tenant

222 Actions for this Date Range

Date Run: 09/30/2015  
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# 25 Built in Reports

This sample report shows all activity for the client, Mark Miller, in his “Immigration” matter.

Other reports are designed for Management, Executive Assistants and Attorneys.



All Activity For Client:  
Mark Miller

Case Status	Case Number	Case Matter	Statute of Limitations	Closed Date	Judge Assigned	Counsel	Trust Balance
Closed	2015-PI-08-0001	Immigration	Aug 08, 2018	Aug 05, 2015	Patricia S. Oney	Drew C Jenney	-\$ 420.00

Date / Time	Activity Description	Activity Completed By:	Hours / Billable / Billed
Aug 05, 2015	Matter Created	Andrew Schmidt	0.0 No No
Aug 05, 2015	Initial Counsel: Drew Jenney	Andrew Schmidt	0.0 No No
Aug 05, 2015	Changed Court Information	Andrew Schmidt	0.0 No No
Aug 05, 2015	Consultation on 08/05/2015 3:00 PM - Received initials details on the accident.	Drew Jenney	1.0 Yes No
Aug 05, 2015	Changed Court Information	Andrew Schmidt	0.0 No No
Aug 05, 2015	Court on 08/05/2015 4:00 PM - Filled initial documents with the court. Opposing party did not show. Had to reschedule.	Drew Jenney	0.5 Yes No
Aug 05, 2015	Case Closed with Default Judgement on 2015-08-05	Andrew Schmidt	0.0 No No

Total: 1 Cases Total Trust Balance: -\$ 420.00

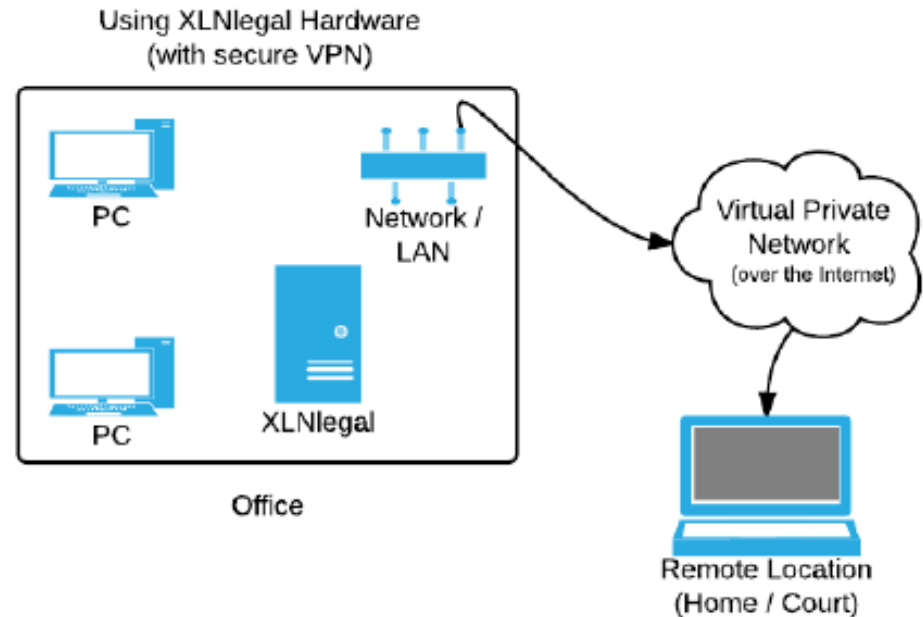
Date Run: 09/29/2015  
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# System Set-up

With XLN Legal, all information and documents are stored at your site.

Remote accessibility requires an XLN approved VPN.

XLN Legal runs on your Desktop or Laptop using Windows Vista or newer. XLN Legal requires Adobe Acrobat & Office 2007 or newer.





## Additional Features

- *Utilizes your email environment*
  - *Both incoming and outgoing Email*
  - *Uses a Copy of your individual Emails from your Inbox*
- *Billing & Invoicing*
  - *Generate Pre-Bills & Bills*
- *Notification of Upcoming Events*
  - *Notifies you at Login of Important Events*



## Additional Information

- *Contact Anthony Perk*
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- *Call the Columbus, Ohio office*
  - *614.947.3607*