

*What It Does*

Statement Emailer emails your ProLaw pdf statements to the parties you have selected as billing and billing cc contacts. The tool can be run in attended or unattended mode. The attended mode includes a set up interface where the starting date for statements to be emailed is set, along with the number of statements to attach before zipping all available, the subject line for email; opening and closing text for emails, statement path, and email addresses for auto sending of verification as well as exception reports. When the attended interface is opened, the program shows exceptions as shown in Figure 1.

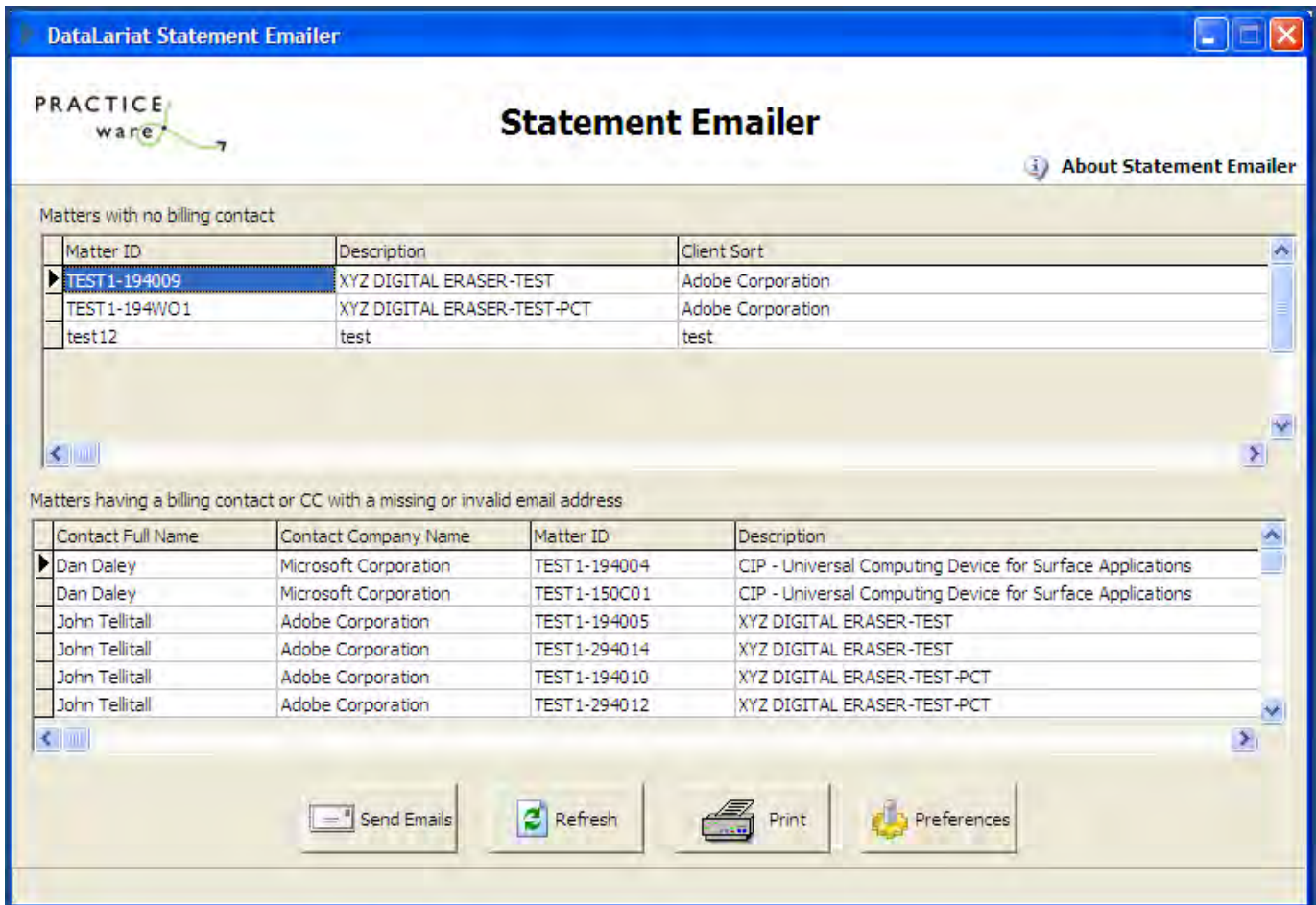


Figure 1. Statement Emailer Attended Interface

## SE Setup:

Installation is included in the purchase price, and user customization is very simple. Two icons are provided with installation (attended and unattended). The unattended option would be used after a thorough testing period. We recommend that initially the program be run in “attended mode” which can occur at the end of a business day. To add preferences regarding text in emails, location of various files, run dates, run the attended version of Statement Emler and Select Edit Preferences to add information as shown in Figure 2. Preferences tracks the last date the Statement Emler was run, so once that is set it need not (but may) be changed. Leave Minimum Number of Statements to Zip blank if you wish all statements to be zipped. All other fields must be completed.

**Edit Preferences**

Email Matter Field Name: qems      Email Phone Type: E-Mail *Make sure this phone type on all email addresses*

Email Subject: Our monthly invoices are attached in PDF format

Verification Report Recipients (separate with commas): ginger@legaltw.com

Exception Report Recipients (separate with commas): ginger@legaltw.com

Minimum Statement Amount: 1.00      Minimum Number of Statements to Zip: 2 *Clear run date to get all; this used to avoid resending same items*

Statement Path: Z:\ltw\prolaw bills\ *Where pdfs stored*      Browse      Last Run Date: 04/14/2009 01:16pm

Email Text (Top - before statement listing): Attached please find your latest statements which I trust you will find in order.

Email Text (Bottom - after statement listing): As always, we appreciate your business. Please do not hesitate to contact the undersigned if you have any questions. Ginger Rendon

Save

Cancel

Figure 2. Statement Emler Preferences Settings

Update EMS Field to Indicate Matters for which statements will be emailed.

LTW will add one checkbox field to your Matters first custom tab labeled EMS to allow you to designate that the matter bills should be emailed. Once that is added, query for the matters which should be emailed and click the checkbox on the first one. If all the others in the search results should be updated, right click on the field and select Mass Changes to add this setup to all in the list. LTW may be able to provide additional advice regarding handling this task at the time of installation. As new matters are opened after initial installation, this field should be checked as part of the file opening process (for email clients). If matters are copied to create new matters, the field is automatically checked.

Check to make sure there are email addresses for each matter for which statements are to be emailed as well as a billing contact.

Loading the interface once Step 1 is completed will show any problems. Print the exception reports and correct the issues. Continue checking until all issues are resolved. When exceptions are found, whether in attended or unattended mode, those on the exception email list in Preferences will receive an email similar to that shown in Figure 3 along with a Verification Report like the one shown in Figure 4..

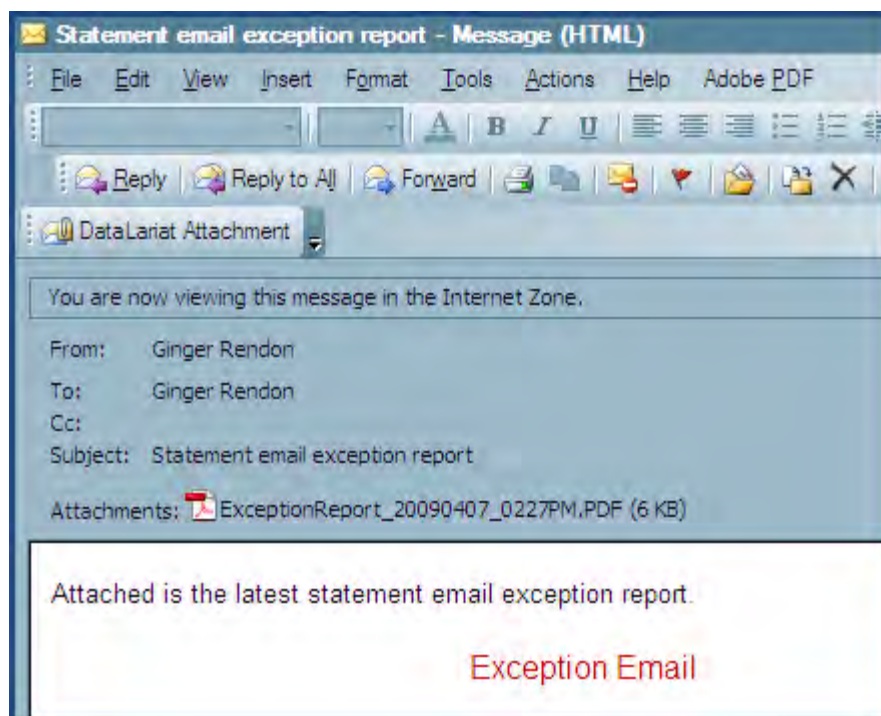


Figure 3 – Exception Email

**Matters with no billing contact**

Matter ID	Description	Client
TEST1-194009	XYZ DIGITAL ERASER-TEST	Adobe Corporation
TEST1-194WO1	XYZ DIGITAL ERASER-TEST-PCT	Adobe Corporation
test12	test	test

**Matters having a billing contact or CC without an email address, sorted by contact**

Matter ID	Description	
<b>Contact:</b> Dan Daley Microsoft Corporation		
TEST1-194004	CIP - Universal Computing Device for Surface Applications	
TEST1-150C01	CIP - Universal Computing Device for Surface Applications	
<b>Contact:</b> John Tellital Adobe Corporation		
TEST1-194005	XYZ DIGITAL ERASER-TEST	
TEST1-294014	XYZ DIGITAL ERASER-TEST	
TEST1-194010	XYZ DIGITAL ERASER-TEST-PCT	Exceptions Report
TEST1-294012	XYZ DIGITAL ERASER-TEST-PCT	(So you can fix problems before running)
TEST1-194006	XYZ DIGITAL ERASER-TEST	
TEST1-194007	XYZ DIGITAL ERASER-TEST	
TEST1-294011	XYZ DIGITAL ERASER-TEST-PCT	
TEST1-194002	XYZ DIGITAL ERASER-TEST	
TEST1-194003	XYZ DIGITAL ERASER-TEST-PCT	
TEST1-294015	XYZ DIGITAL ERASER-TEST	
TEST1-194008	XYZ DIGITAL ERASER-TEST	
TEST1-194001	XYZ DIGITAL ERASER-TEST	

Figure 4 – Exception Report

Verification reports will also be sent each time Statement Emailer is run, with an email similar to that in Figure 5 and a Verification Report attached like the one in Figure 6.

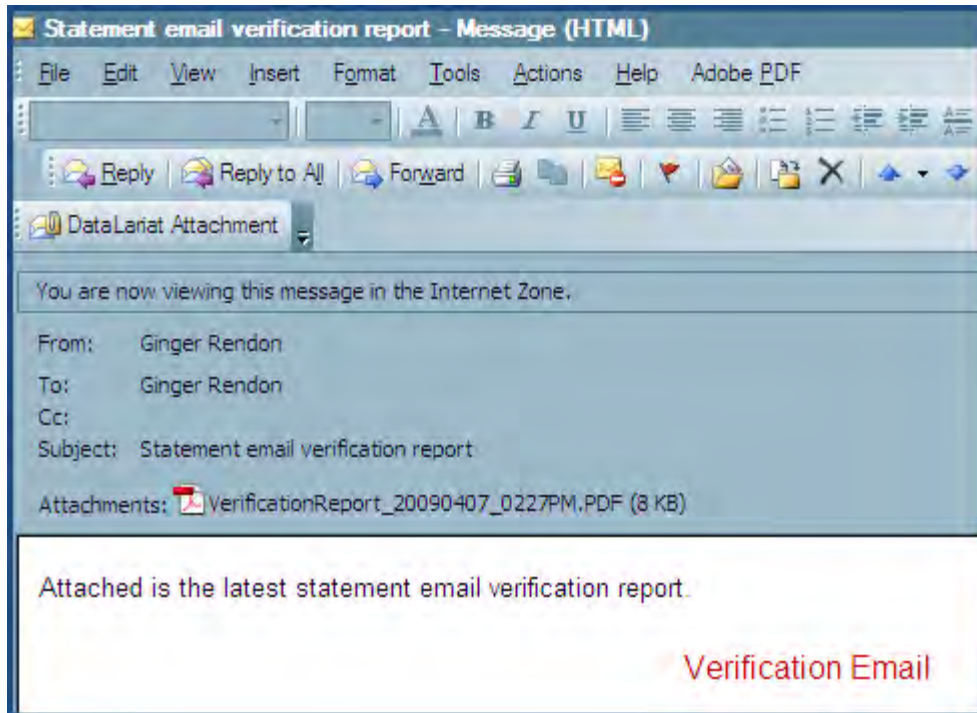


Figure 5. Verification Email

Statement Email Verification Report		04/07/2009 02:27pm		Page 1	
Stmt File	Stmt Date	Stmt No.	Matter ID	Total	
To: Ginger Rendon					
To: ginger@legaltw.com					
20090201_29.pdf	02/01/2009	29	5089-001	\$4,650.00	
20090330_33.pdf	03/30/2009	33	5089-001	\$8,475.00	
Verification Report					

Figure 6. Verification Report

### Email to the Client with the Statements and Summary

The actual email that is sent to the client contains both the invoices (zipped if so designated in preferences) which contains a summary of invoices attached similar to that shown in Figure 7.

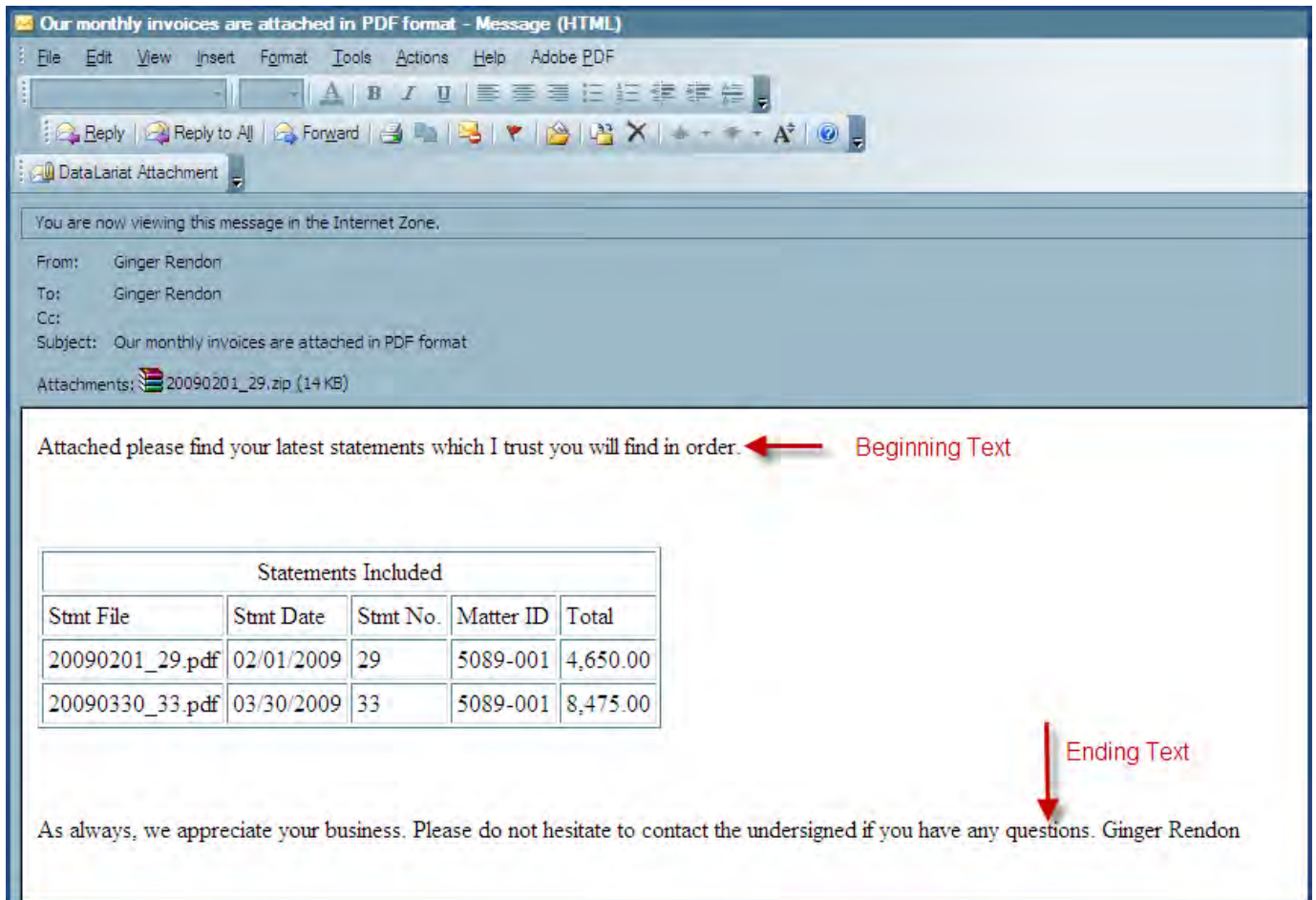


Figure 7. Email the Client Bill Contact receives includes zipped statements and listing of statements included.

When statements are zipped, Statement Emler stores a copy of the zipped invoices under the directory where bills are stored when finalized in ProLaw (which is also shown in the Preferences for Statement Emler) as shown in Figure 8.

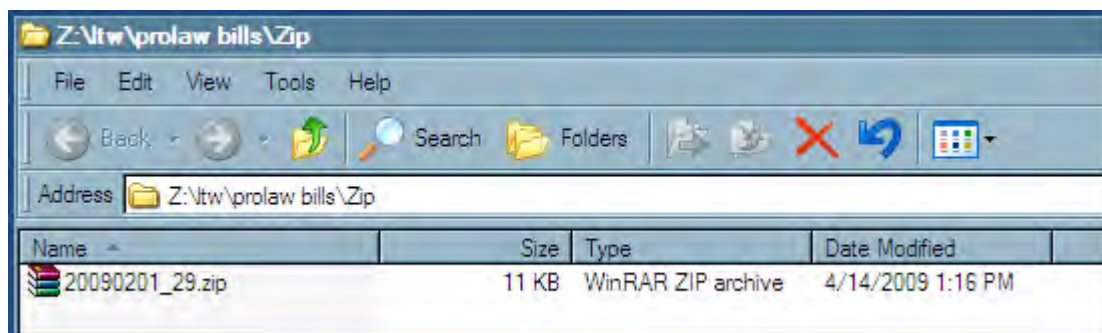


Figure 8. Directory for Zipped Files

Exception and Verification Reports are stored in the sub-directory Reports under the same directory as ProLaw statements as shown in Figure 9.

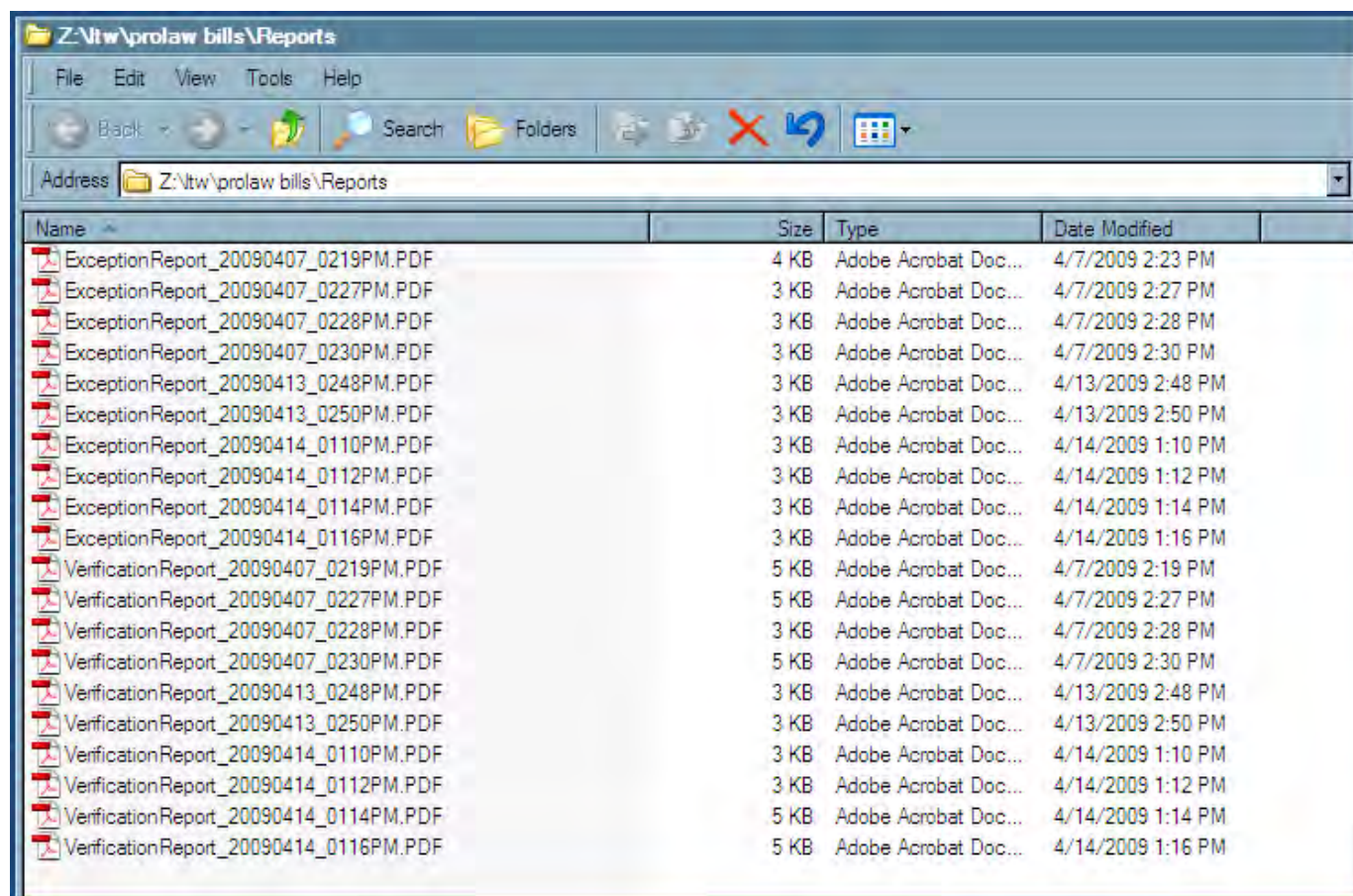


Figure 9. You may wish to delete or archive the files in these directories periodically.

### *Impact on ProLaw Accounting Functionality*

Statement Emailer runs as a standalone application and does not touch any of ProLaw's accounting functionality nor does it update ProLaw system tables. Information regarding setup is stored in tables added at the time of installation. Therefore, there is little possibility that SE could damage or impact any functionality in ProLaw. It is also unlikely that an update to ProLaw would require changes to Statement Emailer. Statement Emailer is connected to the mailbox of the person who runs the attended version. Unattended setup may be facilitated using network scheduling software and/or the ProLaw agent.

## *Pricing*

Statement Emailer retails for \$2500 per server which includes installation, initial consult/training, and 90 days support. Support includes providing advice and/or troubleshooting issues related to the unattended and attended emailing of statements. After 90 days, support contracts are available for \$500 per year and include telephone support and updates to the program if required due to ProLaw program updates or client demand. Ongoing support is optional.