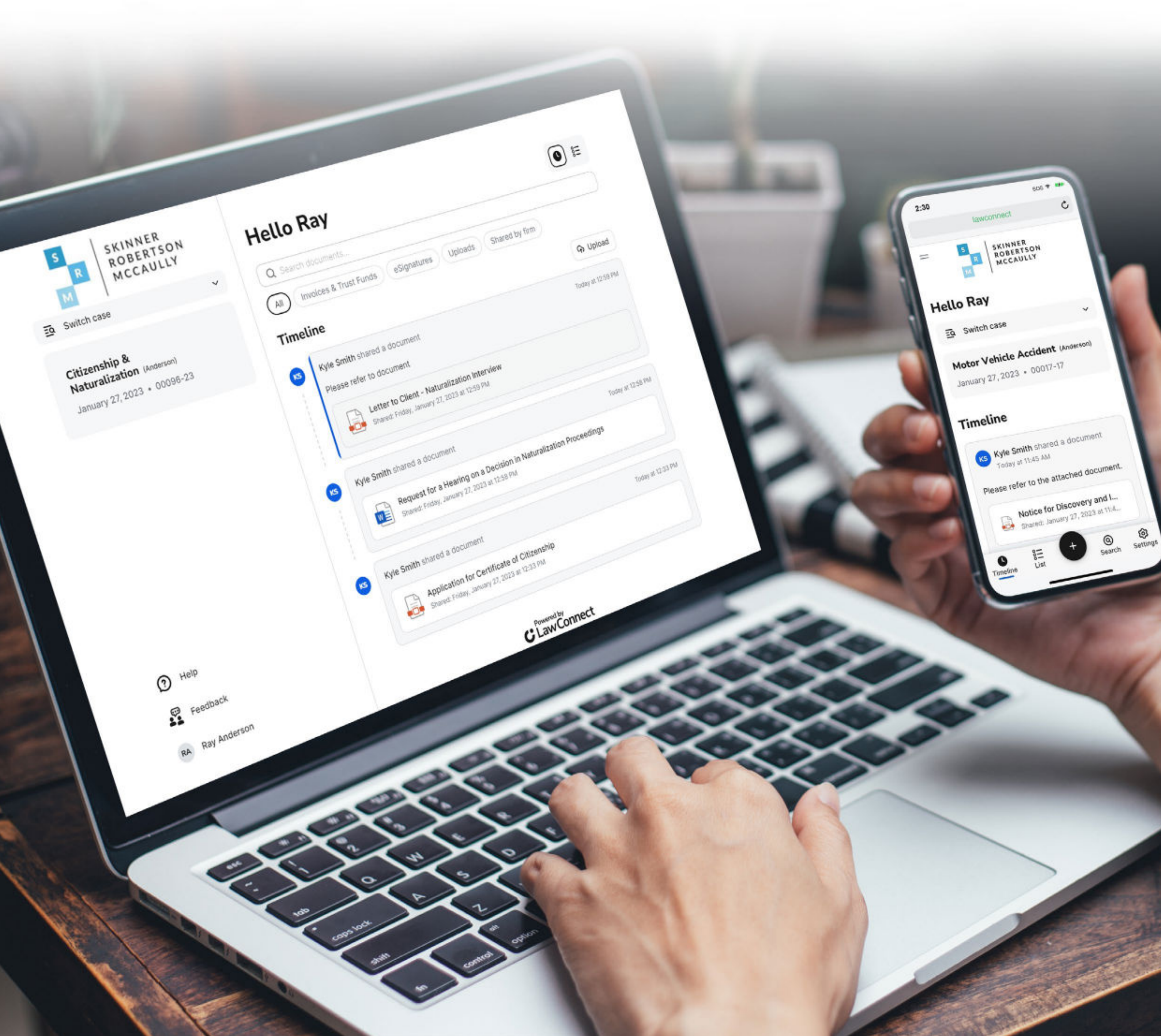
LawConnect

User Guide

This guide has been designed for you, our clients, to optimize your relationship with our firm. This will streamline the management of your case and enhance communication throughout the process.



What is LawConnect

LawConnect is a secure online document sharing and collaboration tool for lawyers and their clients. It is a secure and efficient way to receive, share and privately collaborate on documents with your lawyer from anywhere, at any time.

Why Use LawConnect

— **Secure:** Viewing and sharing documents via LawConnect is safer than email which ensures your confidential documents are not exposed to online scams, phishing, and unwanted prying eyes.

— **Convenient:** LawConnect saves you time and removes the need to visit your lawyer's office allowing you to upload, comment or sign documents online.

— **Accessible:** Benefit from having all your important legal documents securely stored in one place. Easily access trust statements, online or via the app.

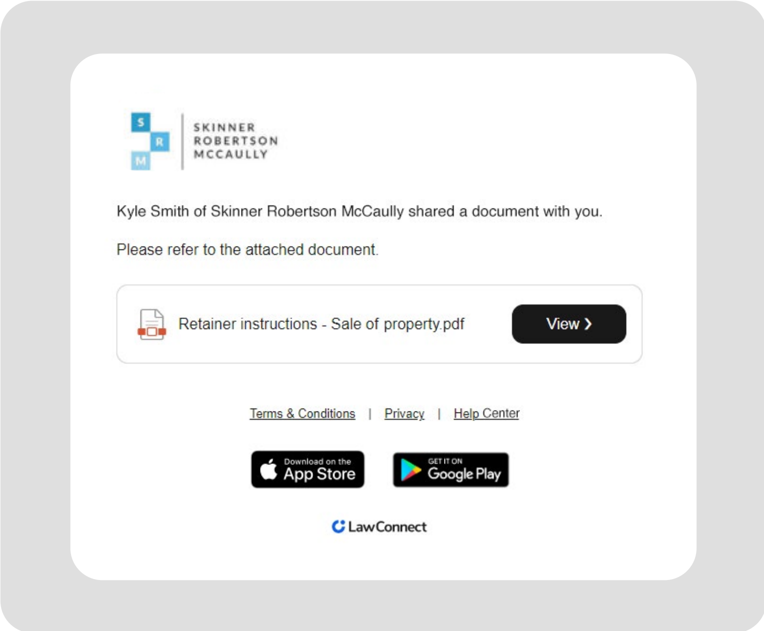
Start conveniently collaborating online with your lawyer today.

— **LawConnect has shared more than 2.5+ million documents online safely and securely**

— **LawConnect has facilitated online collaboration for 9500+ law firms and their clients**

Accessing LawConnect

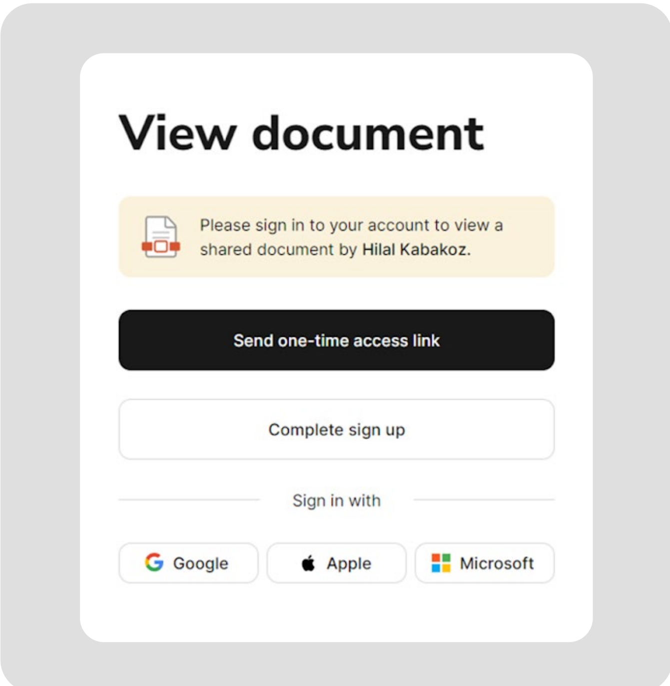
When your lawyer shares a document with you for the first time through LawConnect, you will receive an email invitation. You may also notice it is branded with your lawyer's logo.



Signing In

If you already have an account, simply log in with your username and password or sign in with the **social sign in options** using your Google, Apple or Microsoft credentials.

If you do not have a LawConnect account you can choose to access documents and items via a one-time access link.



One-Time Access Link

One-time access link provides an alternative way to view a document or item shared with you without creating an account or entering a password.

To obtain the one-time link:

1. Click the **View** button in the notification email your lawyer has sent you with the shared document/s and a new window will open.
2. Select **Send one-time access link** from the sign in options to view the shared document/s or item/s.
3. You'll receive an email with a one-time access link. Open the email received and click **Sign in to view** shared documents or items.

Creating an Account

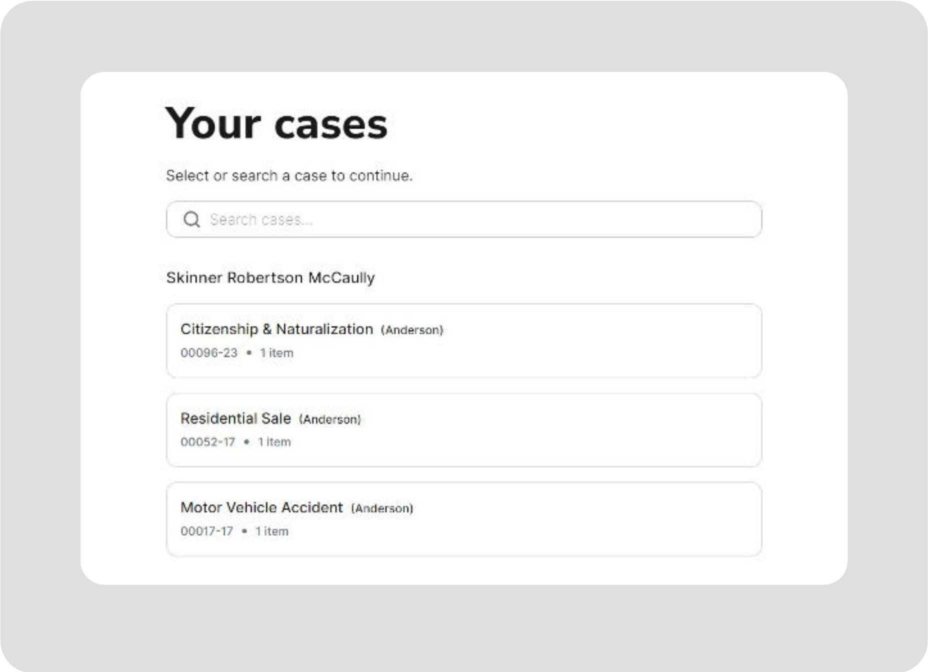
If you'd like to manually create an account, you can do so via the following steps:

1. Click the **View** button in the notification email your lawyer has sent you with the shared document/s and a new window will open.
2. Click **Complete sign up**.
3. Set a password. This new password will be associated with the email address you have been shared a file with.

Matter/Case List

If you have more than one matter that has files shared via LawConnect, you will be presented with the Matter/Case List after signing in to LawConnect.

The matters are sorted in order of recency. You can select the relevant matter by clicking on a matter in the list or you can use the search bar to quickly filter the list.

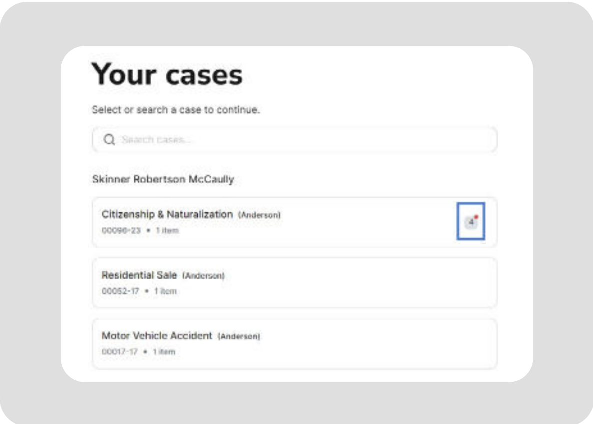


Notifications

Each time a document or item has been shared with you by your lawyer, you will be notified by email. You can then simply request a one-time access link or log into your LawConnect account to view the document or item.

Viewing All Correspondence

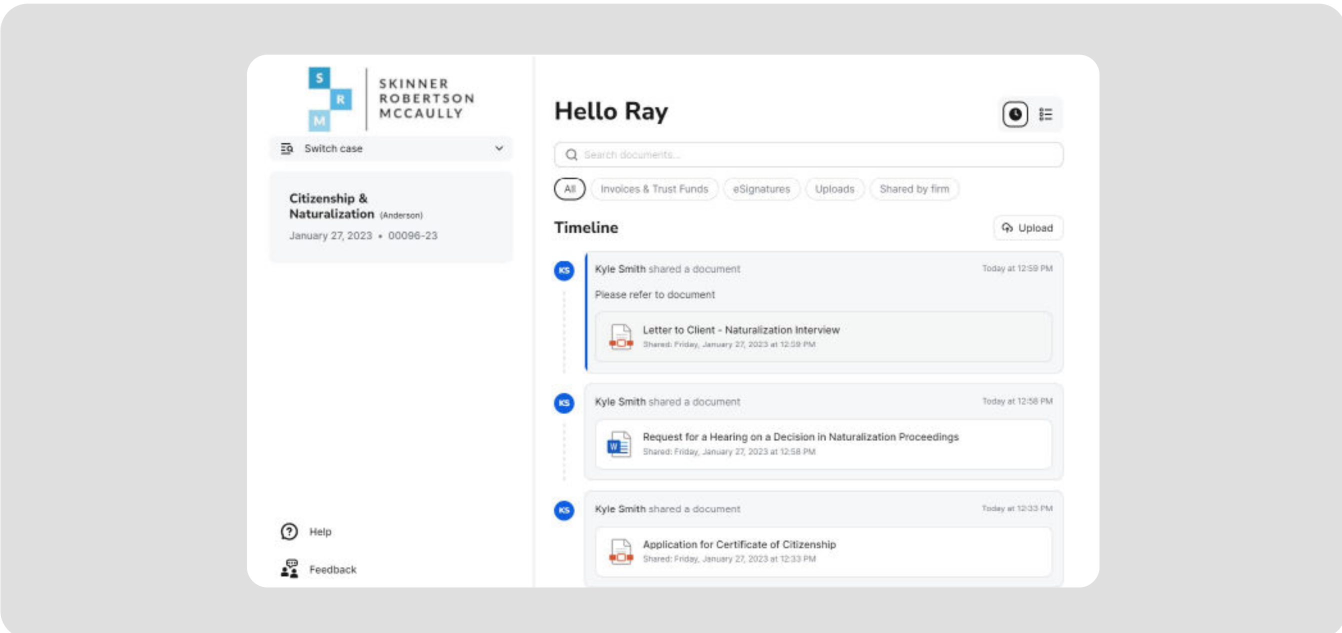
When you are logged into your LawConnect account, matters with recent updates and items that require actioning will have the **notification badge**.



That number signifies the number of outstanding actions you have for that matter. You can click on that matter and check for the latest changes shared and action any outstanding items.

Timeline View

Once you have selected the relevant matter, the dashboard will show you the timeline view for that matter. This lists every item that has been shared chronologically.



To Do

Any outstanding items that require an action, including unpaid invoices or forms pending eSignatures, will be pinned at the top of the Timeline view under the **To Do** section. This makes it easy for you to view any outstanding items that require your action.

Filtering Between Your Documents and Items

You can also navigate through the tabs to view documents and items grouped together:

— **Invoices & Trust Funds** - all trust statements

— **eSignatures** - all documents and forms requiring signatures and previously signed documents

— **Uploads** - all documents and items uploaded and shared by you

— **Shared by firm** - all documents and items shared by your lawyer, including collaboration folders

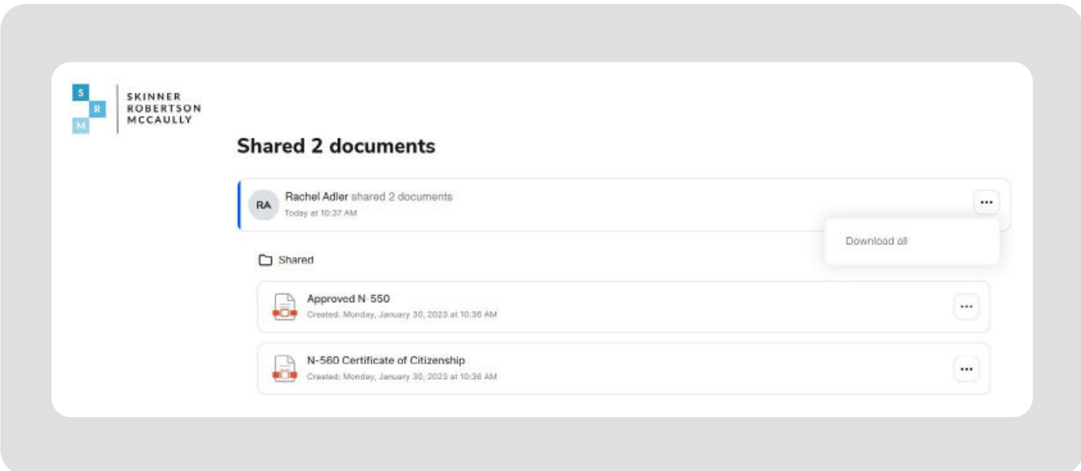
Viewing Shared Documents & Items

1. To view a document, simply click on it and it will display in a new window.
2. If you'd like to download this document, click ••• and **select Download**.

Downloading Multiple Documents & Items

When multiple items or documents have been shared with you, you can download all items in bulk. You must be in the timeline view to **Download all**.

1. To download all, **click on the item with multiple documents in the timeline view list**. This will take you to a new window where you can see the multiple items shared.
2. Click ••• and **select Download all**. All files will begin downloading.



Commenting on Documents

Collaborating with your lawyer on documents is easy using the **Comment** function.

1. Click on the document you'd like to comment on.
2. To add a comment, highlight the text you'd like to comment on.
3. Click +
4. Type your comment.
5. Click **Post**.

When the comment has been saved, it will appear in the right panel under **Comments**. Your lawyer's responses will also appear in this right panel, allowing you to have a complete overview of all comments made.

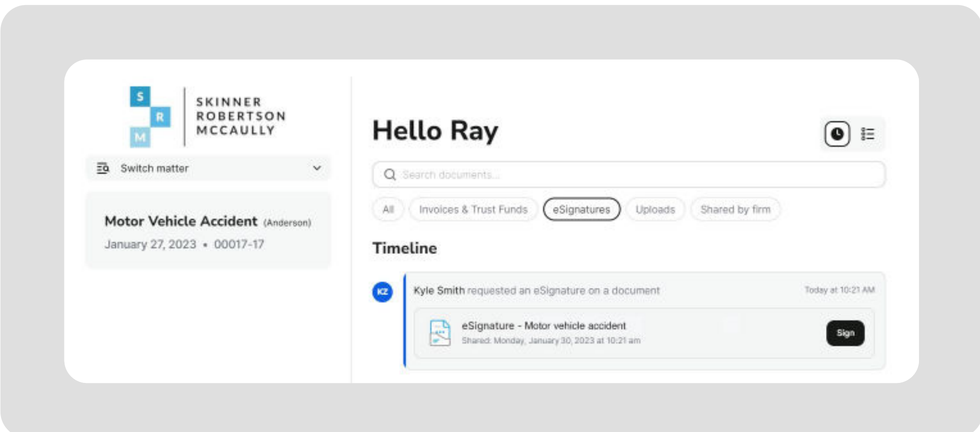
Email notifications are sent to all parties when comments are made.

Signature Requests

If your lawyer has requested an eSignature from you, you can access this by clicking on **eSignature**.

1. Click the **eSignature** tab.
2. Click **Sign** on the document that requires a signature.
3. The document will open in a new window. You will be prompted where to electronically sign.
4. Sign electronically.

Your lawyer will be notified when the document has been signed by all parties.



Uploading Documents to Share With Your Lawyer

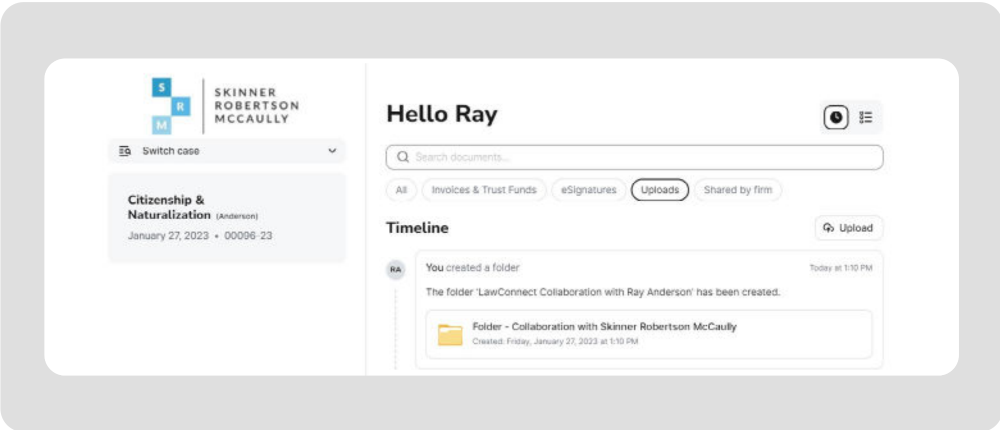
LawConnect is a two-way interaction, meaning you can also share documents with your lawyer through LawConnect.

1. Click the **Uploads** tab.

2. Click the **Upload** button to share items directly with your lawyer.

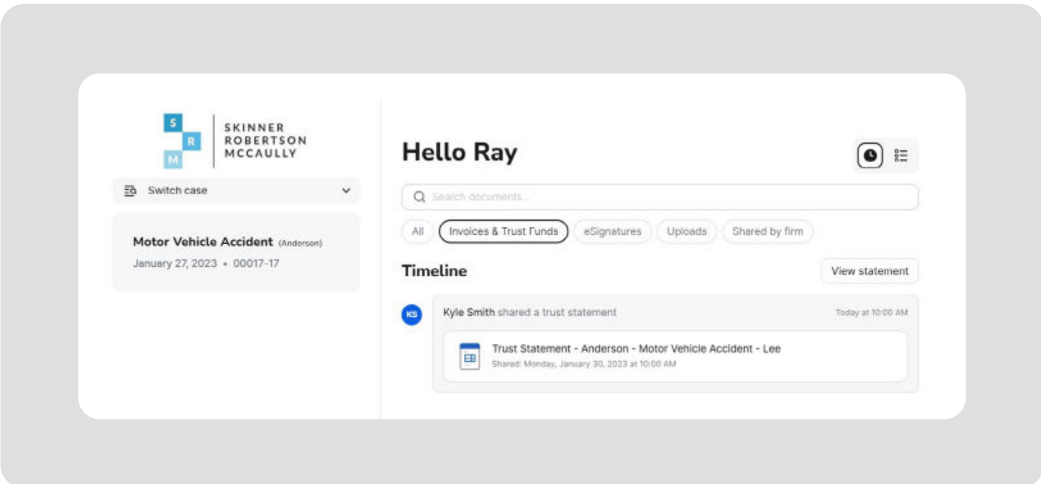
3. Select the document/s or item/s you'd like to upload from your computer and confirm your selection by clicking **Upload**.

Your lawyer will be notified via email that you have shared a document with them.



Invoices & Trust Funds

All invoices and trust fund statements will be available for you to view under the **Invoices & Trust Funds** tab.



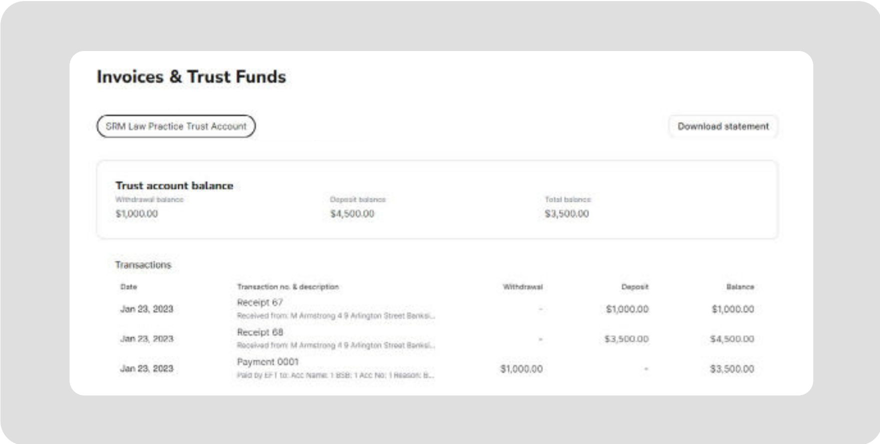
The **View statement** button will take you to the Invoices & Trust Funds screen. Here you can select from different accounts shown at the top of the screen.

Depending on the Account type selected, the list of relevant transactions will be displayed, as well as a brief financial summary. Here you can **Download statements**.

Trust Funds

If you click on **View statement** from the Invoices & Trust Funds tab, you can view and download your trust account statements where money is held on your behalf.

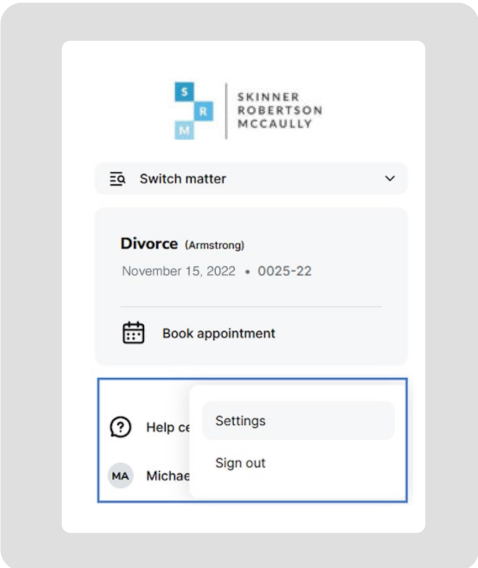
You can view trust deposits and withdrawals as your lawyer works through the case. It will show you the current balance, as well as showing the total deposited, anticipated deposits and withdrawn.

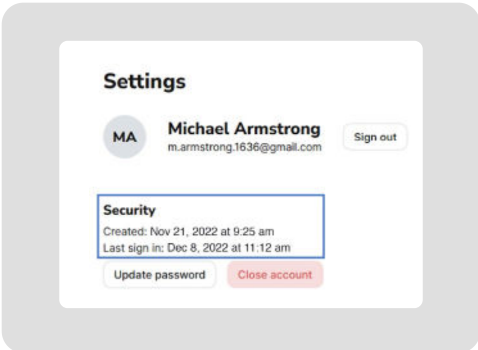


Accessing Your LawConnect Account Settings

To access your account settings, simply click your name at the bottom of the screen when you are logged in.

For added security, you will be able to see the date the account was created and the last time it was accessed. Here you also have the option to update your password.





Closing Your LawConnect Account

You have the ability to close your LawConnect account. Closing your account **permanently deletes the account and file data** from LawConnect and signs out of LawConnect on all devices.

When the LawConnect account is deleted:

— Uploaded files will be deleted from LawConnect servers.

— Files shared by the user's lawyer will be revoked.

— Lawyers the user has interacted with will be notified of the account deletion by email.

LawConnect Mobile App

Available on iOS and Android devices, the LawConnect app allows you to access all the usual LawConnect features in an easy-to-use mobile app. Search for LawConnect in your app store and download today.

Support

If you have further queries, visit the LawConnect Help Center for more information.