

Filevine

Connect

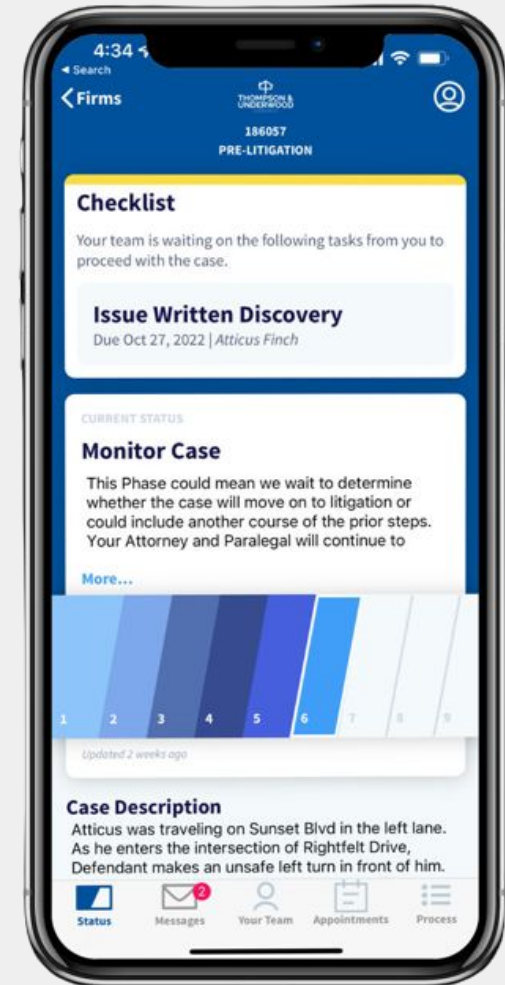
'22

Client Messaging and Communication Platform

- **Operational Efficiency for Your Firm**—thousands of staff hours saved and reduced administrative workload
- **85% Platform Adoption by Clients**—51% decrease in inbound inquiries
- **Grow Your Firm's Revenue**—client satisfaction with analytics and reporting for referral opportunities and reviews
- **A Clear Market Differentiator**—gives firms a way to distinguish themselves during intake to win more cases
- **Strong Filevine Integration!**—workflow and automation, your firm doesn't have to learn a new application



case status



Top 10 Filevine Tips and Tricks

From the Experts

Christine Levi, Manager of Implementations

Logan McLeod, Periscope Manager and Enterprise Legal and Big Law,
Consultant

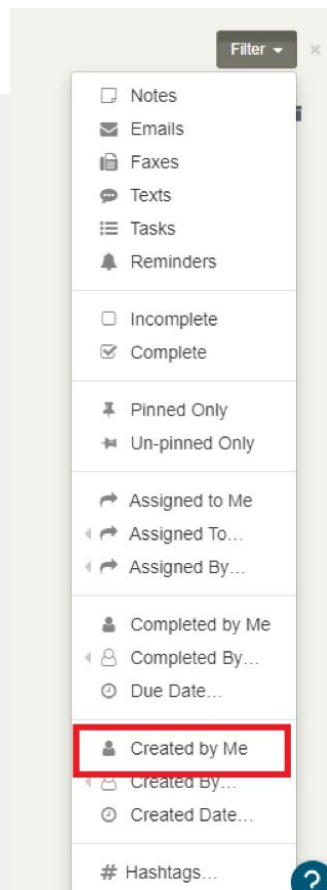


Top 10 Tips and Tricks

1. Feed Filtering
2. Tasking vs Mentioning
3. “Note This” to Communicate Internally on Documents
4. Keyboard Shortcuts
5. Fax From a Project
6. Process Development
7. Fields for Navigation
8. Staff Assignments—Who has Ownership of What
9. Working Reports
10. KPI Tracking

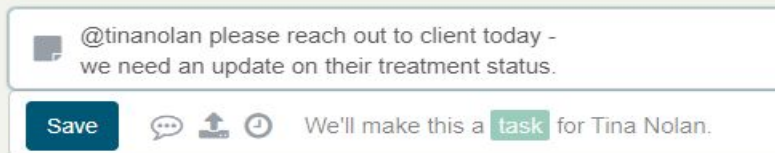
Feed Filtering

Is your personal feed becoming overwhelming? Filter your feed to view anything that is “Created by Me” and quickly archive what you don’t need!



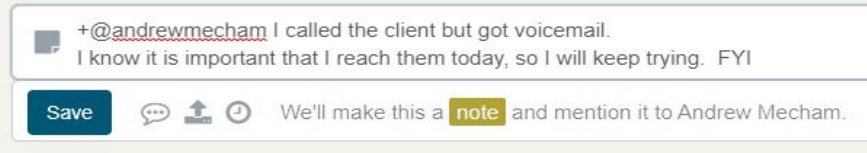
Tasking vs Mentioning

Train staff to use tasking (@) when the recipient of the task has an actionable item.



A screenshot of a tasking interface. At the top, there is a text input field containing the message: "@tinanolan please reach out to client today - we need an update on their treatment status." Below the input field is a row of controls: a dark blue "Save" button, three icons (speech bubble, upload arrow, and clock), and a label "We'll make this a task for Tina Nolan." The word "task" is highlighted in a green box.

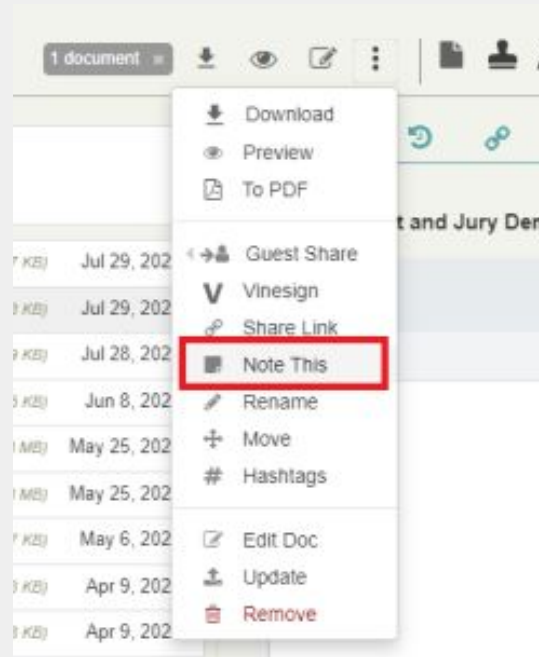
Train staff to mention (+@) a user when that user does not have an actionable item.



A screenshot of a mentioning interface. At the top, there is a text input field containing the message: "+@andrewmecham I called the client but got voicemail. I know it is important that I reach them today, so I will keep trying. FYI". Below the input field is a row of controls: a dark blue "Save" button, three icons (speech bubble, upload arrow, and clock), and a label "We'll make this a note and mention it to Andrew Mecham." The word "note" is highlighted in a yellow box.

“Note This” To Communicate Internally

In your Documents section, select the document and click “Note This” to mention or task your colleagues.



“Note This” To Communicate Internally

The recipient will receive a task or mention in their activity feed with the document attached. Use the Vine for interoffice communication about that particular document.

Create Note for 'Levi et al v State Farm 12345'

@tysongonzalez please review the complaint for filing.

Complaint and Jury Demand.docx

Save

We'll make this a task for Tyson Gonzalez.

Preview

@tysongonzalez

please review the complaint for filing.

Posted by you on 3/7/2022

Complaint and Jury Demand.docx

Recent Activity

@tysongonzalez

please review the complaint for filing.

Posted by you on 3/7/2022 at 1:58 PM.

Complaint and Jury Demand.docx

Recent Activity

Due Today

Utilize Keyboard Shortcuts

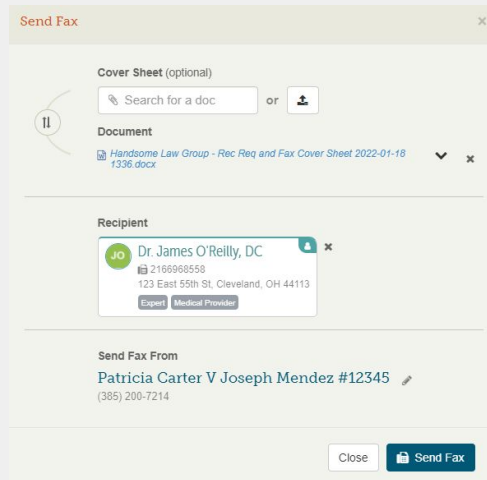
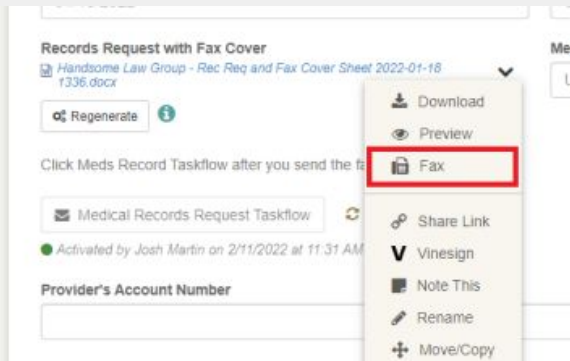
1. You don't have to scroll endlessly to save a section—use Ctrl + S or Command + S to easily save.
2. You can quickly find a data point you're searching for in a specific section—use Ctrl + F or Command + F to search.
3. Accidentally deleted your comment before you hit save? Undo it!—Use Ctrl + Z or Command + Z.



Fax Right From a Project

Generated a request? Fax directly from your project.

The confirmation of the fax being sent automatically updates in the project's activity feed.



Process Development

Recommended Processes:

- Client Sign Up
- Investigation
- Treatment
- Records Collection
- Demand/Negotiation
- Litigation Prep
- Settlement
- Funds Disbursed/Wrap-Up



Records Collection

Records Collector

Type to search 

Document Share Link

URL

 Generate Request Email

Collection Complete?

☒ Yes ☐ No ☐ Unknown

Date Records Received

mm/dd/yyyy



Send out Welcome Letter

Posted by Filevine System on 8/27/2020 at 4:04 PM.



Medical Records Request Email

Posted by Filevine System on 8/27/2019 at 12:57 PM. Triggered by [Taskflow Button](#)



Follow up with Retainer

Posted by Filevine System on 8/27/2020 at 4:00 PM.

+ Add Hashtag

Phase

Treatment

PNC

test phase 2 is it there?

MVA client sign up

File Set-Up

Treatment 

No-Fault Arbitration

Liability Demand

UIM

Prep for Demand

Litigation

Archived

Imported

Fields to Optimize Navigation

Utilize field types to embed directions, explanations, quick links, Task-Flows or Templated Emails to improve system usage and efficiency.

Case Grade Instructions

Grade A : Total Policy Limits above \$1Mil Damages above Y

Grade B: Total Policy Limits between \$500- \$1Mil *and/or* Damages above Y

Grade C: Total Policy Limits between \$250-\$500 *and/or* Damages above Y

Grade F: At-Fault/No Case

Case Grade

✓ Unknown

A
B
C
D
E

Instruction Fields



Records Collection

Records Collector

Type to search



[Click Here to submit Records Request](#)

Document Share Link

URL

Generate Request Email

Collection Complete?

☒ Yes ☐ No ☐ Unknown

Date Records Received

mm/dd/yyyy

Notes

Embedded Links and Templated Emails

Collection Complete?

☒ Yes

☐ No

☐ Unknown

Date Records Received

03/09/2022

Records Collected. Add to Damages

Embedded Task Flow

Staff Assignments

Ensure you have sufficient Staff Assignment fields to account for all Roles at the firm and that they are used properly. These are the people responsible for each step in the case's lifecycle.

**Use
designated
fields in a tab**

**Use Roles in
the Teams tab**

Staff Assignments

Primary Attorney

Type to search



Associate Attorney

Type to search



Assigned Paralegal

Type to search



Case Manager

Type to search



Case Developer

Type to search



Co-Counsel(s)

[+ Add Person](#)

Primary



Ginette Stoltz

Admin-Follower



Administrative Assistant



Diana Galindo-Kiefer

Admin-Collaborator



Associate Attorney



Kyler Morris

Collaborator



Managing Partner



Allen Purcell

Follower



Paralegal



Heather Luke

Admin-Collaborator



Runner



Dustin Hansen

Admin-Collaborator



Working Reports

Example Reports:

- Client's signed up needing welcome Letter
- Cases Ready for Demand/Settlement/Disbursement etc.
- Treatment Completed/Records Collection
- Client Contact/Follow Up

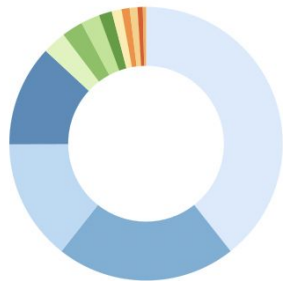
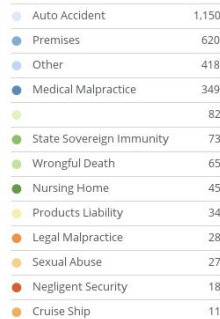
Saved Reports						
Created by: Mandolin Martin (19361 Results)						
★ Deadlines  FILTER MENU Calendar Events Cases with expense, TA, meds totals Client Automation Requests (All) Client List (Contacts) Collections Export Report - Pleading Dates and Deadlines Communications test (1) Contact Mailing List Contacts Costs						
Deadline Type	Client Full Name	Project Name	Project Phase	Due Date	Done Date	Deadline Notes
Pleadings: Pleading Deadline	XXX Test Fake Test	Berman & Simmons Test Case	Non-Case Projects	05/17/1209		
Pleadings: Pleading Deadline	XXX Test Fake Test	Berman & Simmons Test Case	Non-Case Projects	05/31/1814		
Onboarding: Launch Date	Ronda Baldwin-Kennedy	Ronda Baldwin-Kennedy	Ex-Customer	01/27/1920		
Opportunity: Contract End Date	JP Prentis	Burnham Law	Ex-Customer	05/12/1923		
Case Summary: First Statute of Limitations:	David S. MacDonald	David S. MacDonald	Potential	01/01/2005		
L/D for Resp't's Answers/Responses to Discovery	Miriam A. Johnson	MAJ - Personal Account	Non-Case Projects	08/01/2011		L/D for Resp't's Answers/Responses to Discovery Due 30+3 days

KPI Tracking

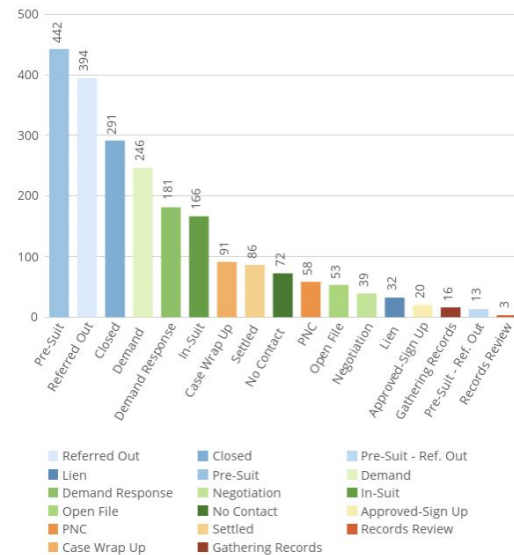
Recommended KPIs:

- **Case Loads:** Staff, Phase, Case Type, Grade.
- **Intake:** Intakes, Signups, Sources
- **Settlement:** Amounts and Fees by month, staff, case type, and source
- Any other metric that defines success at your firm

Cases per Incident Type



Cases per Phase

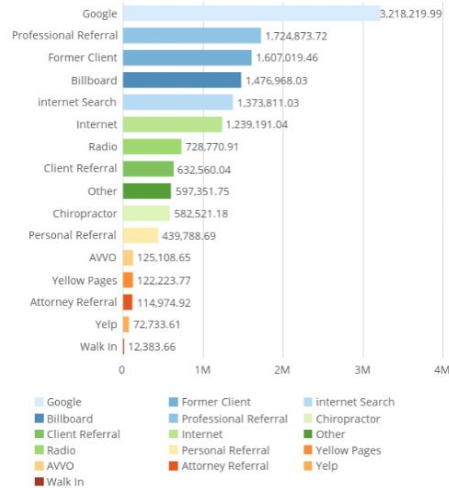


KPI Tracking

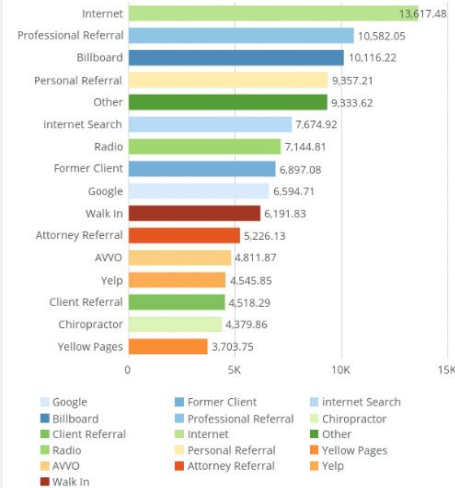
Settlement Dashboard

Settlement Month/Year	Total Cases Settled	Total Settlement Cc
2018-August	1	\$8
2018-June	80	\$2,191
2018-May	97	\$1,808
2018-April	74	\$3,015
2018-March	91	\$1,937
2018-February	88	\$1,722
2018-January	93	\$1,468
GRAND TOTAL	524	\$12,155

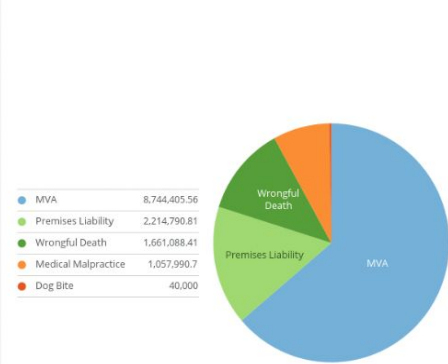
Total Fees per Source



AVG Fees per Source



Total Fees per Incident Type





“

“If it’s not in Filevine, it didn’t happen.”

-Christine Levi

“Data in IS data out.”

-Logan McLeod

Docs+

Streamlined Document
Management Native to Filevine



Manage Every Document and Case in One Place



CREATE

new documents or generate recurring documents with one click.



ORGANIZE

all your documents and case files the way you want them.



SEARCH

for exactly what you need with tools that filter down across and within multiple document types.



EDIT

documents and PDFs without having to download, upload, or using four different systems.



SHARE

the documents and information you need securely with a simple click.



PREPARE

documents for court with Bates Stamping and Doc Combiner.

What's New for Docs+

Improved ways your team can collaborate and stay organized

Two Way Folder Sharing

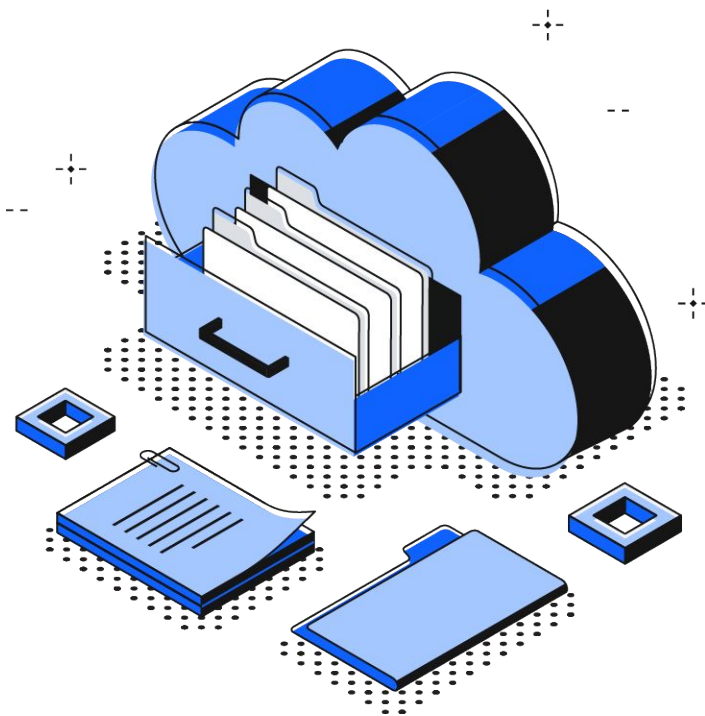
Securely share documents/folders with outside parties

Document Locking

Prevent overriding edits from multiple users

Folder Upload and Doc Zipping

Maintain your folder structures in and out of Filevine



The Docs+ Advantage

Filevine is building the most streamlined and complete document management system on the market. And there's so much more to come.



Lead Docket

Find and Convert More Leads



Attract, Convert & Retain More Clients



CAPTURE
every lead



MANAGE
client relationships



AUTOMATE
communication
and recurring tasks



INTEGRATE
with Filevine and
other tools you're
already using



OPTIMIZE
your marketing
budget

What's New for Lead Docket

Tailor Lead Docket to fit your team's unique needs

Custom Contacts

Add custom fields to your contacts to store key details about your clients

When a lead becomes a client, your contact's information is transferred to Filevine

Custom Roles

Customize roles to optimize your team, tasks, and workflows



Take your lead management to the next level

Tips and tricks for success with
Lead Docket



Get the Most Out of Your Referrals

The screenshot displays a CRM interface for managing leads. At the top, there is a search bar and navigation icons. Below the search bar, the 'Leads' section is active, with a breadcrumb trail 'Home / Leads'. A 'Statuses' dropdown menu is visible. The main area shows a table of referred leads. The first lead, Andrew Tromp, is highlighted, and its 'Referred Status' is 'Settled / Closed', which is circled in red. The table includes columns for Name, Assigned To, Referred Date, Referred Status, Referred To, Case Type, Marketing Source, Rating, and Office. A pagination bar at the bottom shows the first page of 100 items out of 873 total items.

Search for a contact or lead...

★ Leads

Home / Leads

Statuses ▾ Substatuses ▾

Referred

Excel

Filter: settled

Name	Assigned To	Referred Date	Referred Status	Referred To	Case Type	Marketing Source	Rating	Office
Edit Change Status Andrew Tromp	Cameron Killmer	2/23/2022	Settled / Closed	Taylor Law Firm	Foreclosure	Sponsorships	★★★	Morg

<< < 1 2 3 4 5 6 7 8 9 > >>

Displaying 1 - 100 of 873 item(s)

See the Full Picture with Reports

LEAD
DOCKET

☆ Add New Lead

🏠 Intake Dashboard

📁 My Open Cases

★ Leads

👤 Contacts

📋 Tasks

📁 Pending Filevine

👤 Manage

📊 Reports

💰 Expenses

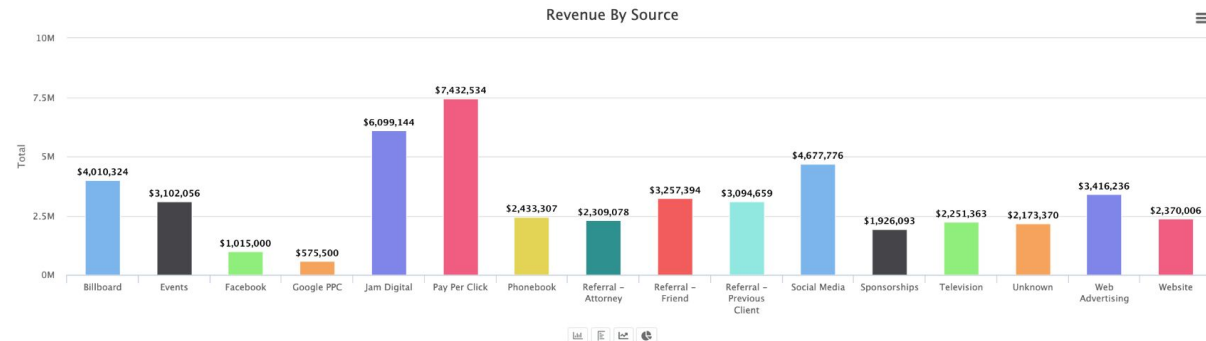
📁 Settlements

🔗 Mass Torts Lead Docket

Revenue By Marketing Source

Home / Reports / Revenue By Marketing Source This Year

Offices ▾ Views ▾



Revenue By Marketing Source This Year

Definitions

Excel

Filter:

	Marketing Source	Revenue	Expenses	ROI	Conversion	Leads	Lead Cost	Clients	Acq Cost	Avg Revenue
View	Pay Per Click	\$7,432,534	\$723,300	927.59 %	89.33 %	178	\$4,063	159	\$4,549	\$64,074
View	Jam Digital	\$6,099,144	\$0	0.00 %	0.00 %	0	\$0	4	\$0	\$53,975
View	Social Media	\$4,677,776	\$28,000	16,606.34 %	91.77 %	158	\$177	145	\$193	\$37,724



Vinesign

Make eSignature Work for You



Vinesign as a Competitive Edge

Product Area

1. SMS Text Messaging
2. Integrations
3. Reporting
4. User Management

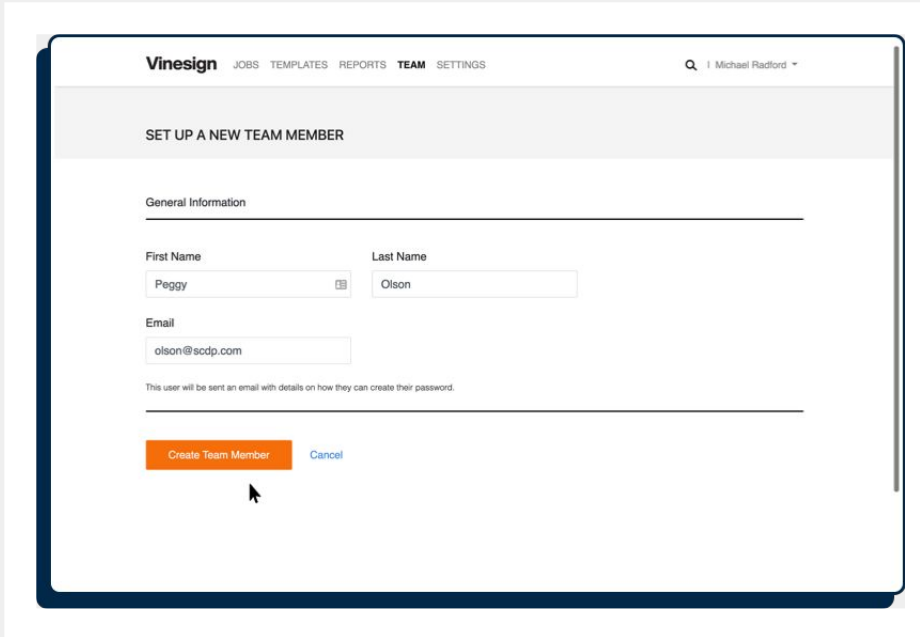
Benefit

1. Fastest response times
2. Seamless organization
3. Data-driven decisions
4. Right people, right access

Outcome

1. Client retention, eliminate delays, faster settlement
2. Time saved generating and storing documents
3. Follow-up appropriately, never let a request slip
4. Collaboration and security

Use Case Ideas



The screenshot shows a web application interface for Vinesign. At the top, there is a navigation bar with the Vinesign logo and links for JOBS, TEMPLATES, REPORTS, TEAM, and SETTINGS. A search icon and the name 'Michael Radford' are also present. Below the navigation bar, the main heading is 'SET UP A NEW TEAM MEMBER'. Under this heading, there is a section titled 'General Information'. This section contains three input fields: 'First Name' with the value 'Peggy', 'Last Name' with the value 'Olson', and 'Email' with the value 'olson@scdp.com'. Below the email field, there is a small note: 'This user will be sent an email with details on how they can create their password.' At the bottom of the form, there are two buttons: 'Create Team Member' (orange) and 'Cancel' (blue). A mouse cursor is pointing at the 'Create Team Member' button.

- Take advantage of unlimited signatures for internal documents, too
- Private Jobs & Templates enable you to manage visibility for sensitive documents like employment agreements or vendor contracts

What's New in Vinesign



MULTISIGN

to support up to 15 signers per document



BULK SEND

to reach up to 1,000 signers at once



DOCUMENT VERIFICATION

to confirm authenticity & legitimacy



TRACK VIEWS

to get detailed updates on signature progress



PRIVATE JOBS & TEMPLATES

to manage sensitive documents

Vinesign, Filevine, and Lead Docket

DESIGNED TO WORK TOGETHER

Filevine

- Open any document in Vinesign
- Organize & store signed documents
- Pull client contact info

Vinesign

- Send documents for eSignature
- Templates & messages
- Progress tracking & reports

Lead Docket

- Capture contact info & case details
- Send representation agreements
- Autofill client info & case details

RingCentral & Filevine

Gain Control of Phone Operations



Capabilities & Benefits



AUTOMATIC TASKS

for Filevine users whenever they get a missed call or voicemail



LOG CALLS

automatically in a client's project for a complete communication record



CAPTURE DATA

about calls like date, time, and duration for accurate and easy summaries



CENTRALIZE COMMUNICATION

to reduce error and enable better follow-up from your team



ACCOUNT FOR TIME

by using collection items to report on things like time spent on calls



COMING SOON: VOICEMAIL TRANSCRIPTION

to save time spent listening to voice messages

Filevine Insiders

To join current & upcoming
beta groups, become a
Filevine Insider!





Thank you