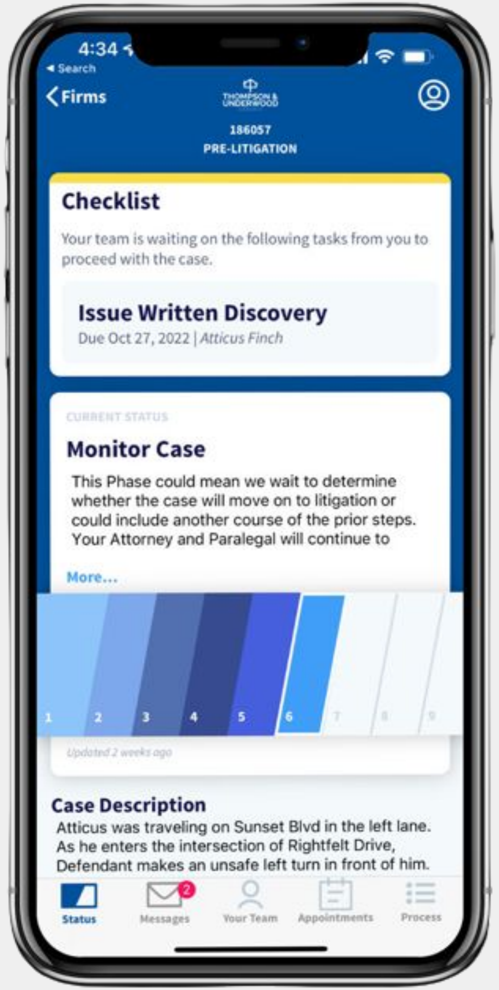
Filevine Connect '22

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



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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

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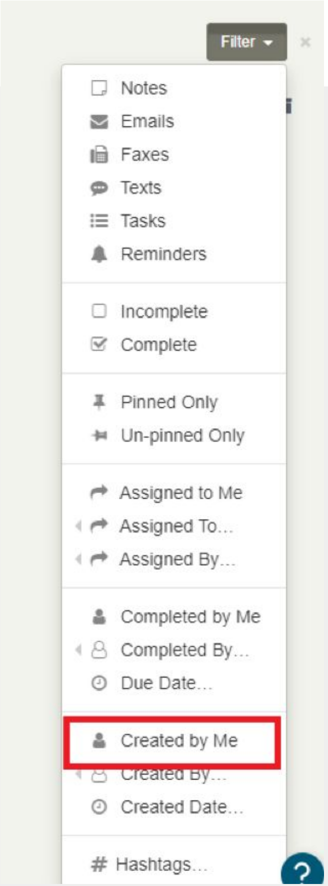
Top 10 Tips and Tricks

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

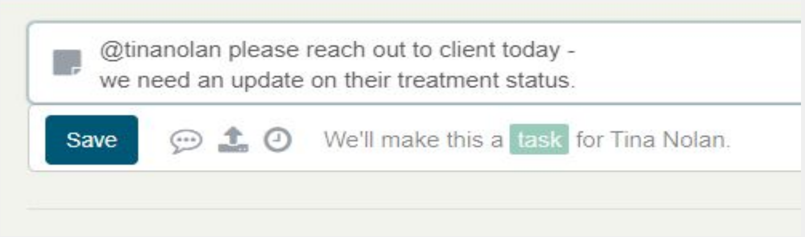
Feed Filtering

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!

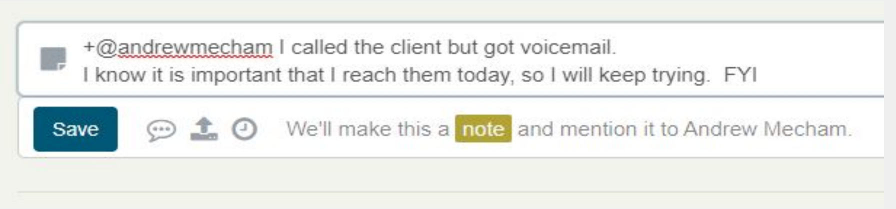


Tasking vs Mentioning

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

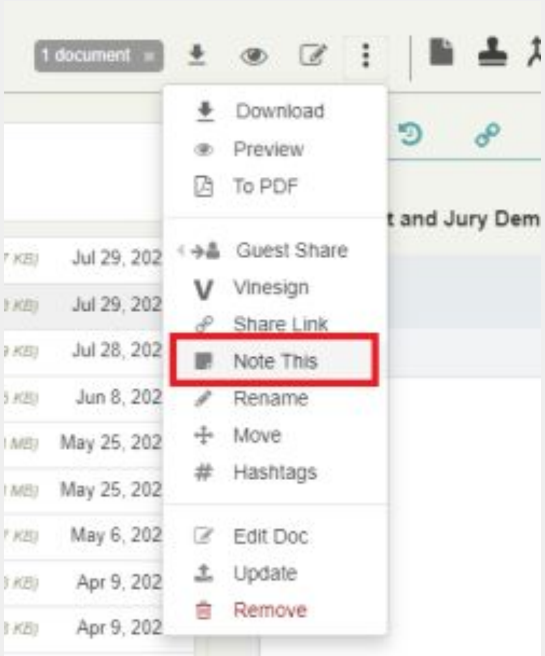


Train staff to mention (+@) a user when that user does not have an actionable item.



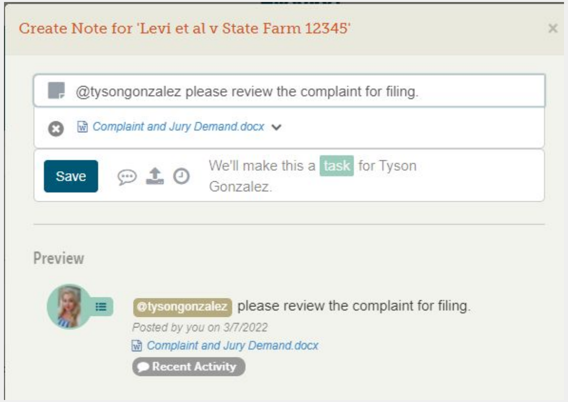
“Note This” To Communicate Internally

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.



Utilize Keyboard Shortcuts

1. You don’t have to scroll endlessly to save a section—use Ctrl + S or Command + S to easily save.

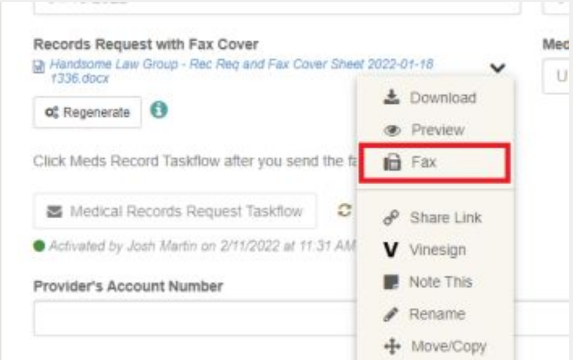
2. You can quickly find a data point you’re searching for in a specific section—use Ctrl + F or Command + F to search.

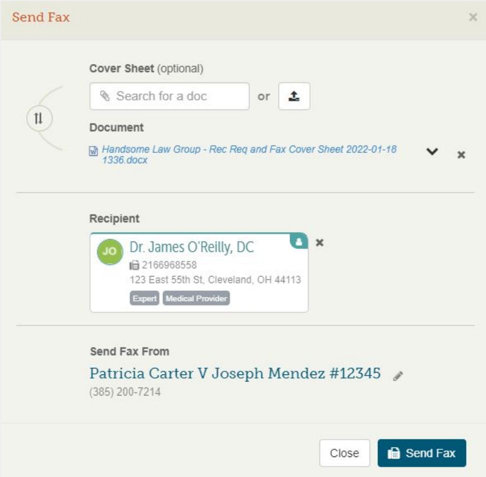
3. Accidentally deleted your comment before you hit save? Undo it!—Use Ctrl + Z or Command + Z.

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.





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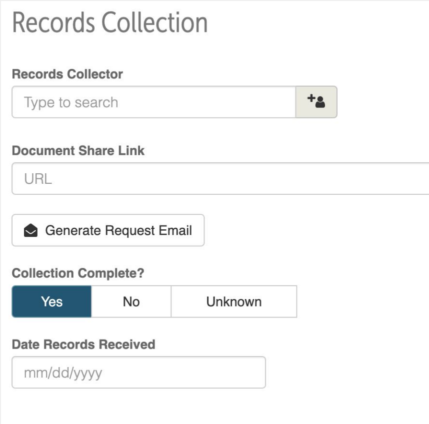
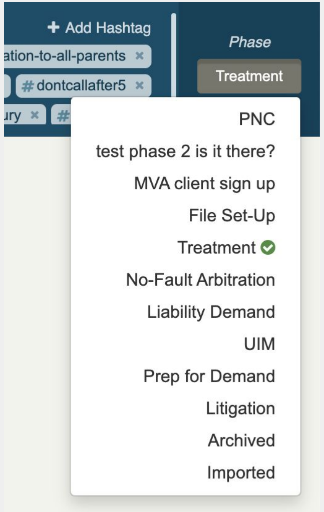
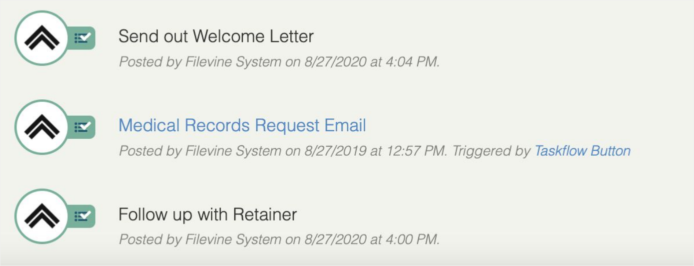
Process Development

Recommended Processes:

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

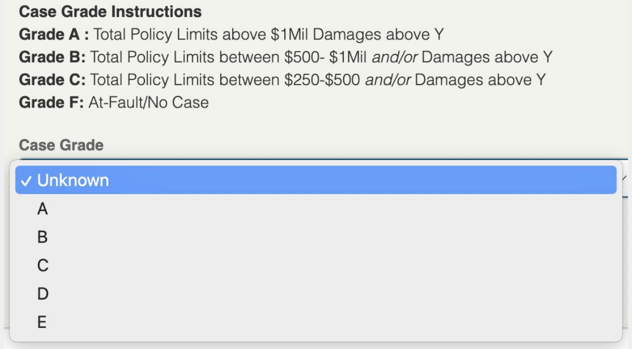




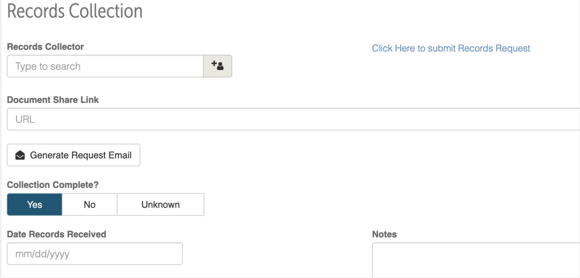


Fields to Optimize Navigation

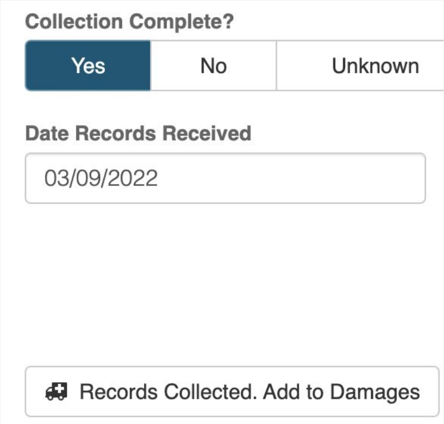
Utilize field types to embed directions, explanations, quick links, Task-Flows or Templated Emails to improve system usage and efficiency.



Instruction Fields



Embedded Links and Templated Emails

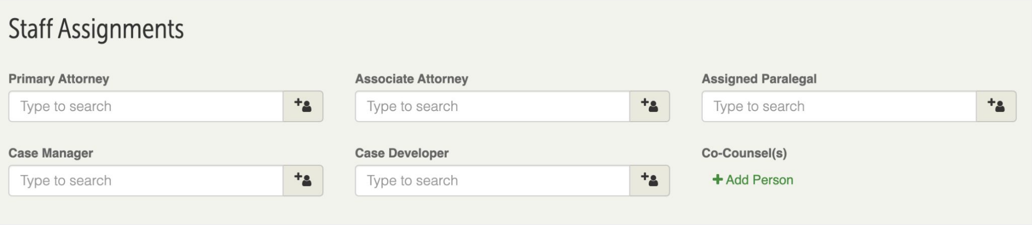


Embedded Task Flow

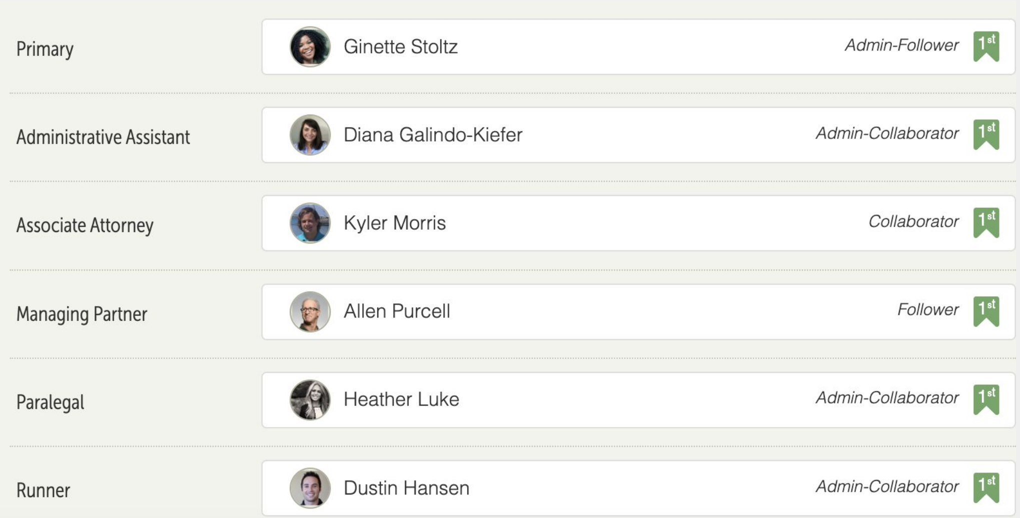
Staff Assignments

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



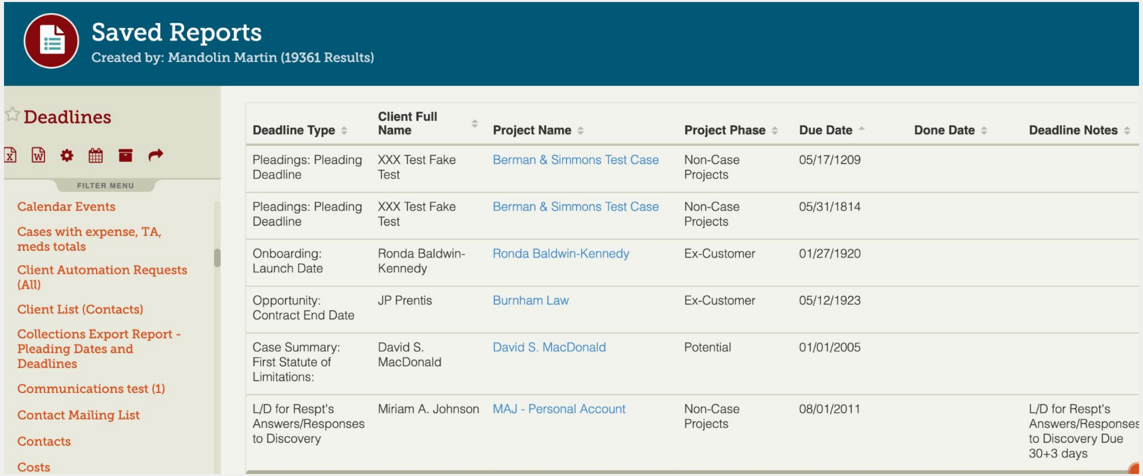
Use Roles in the Teams tab



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

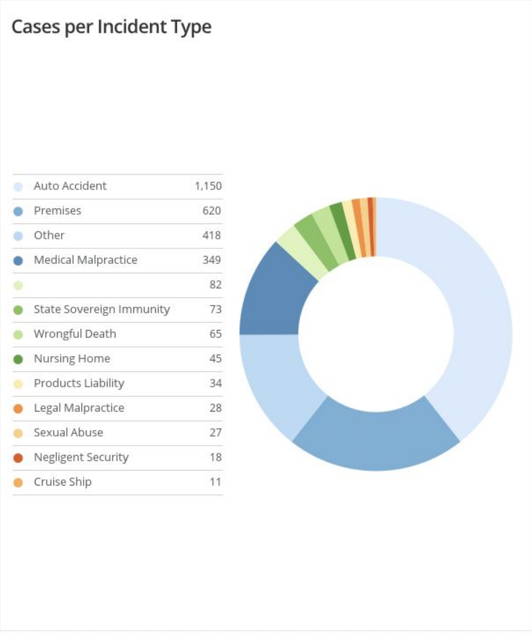


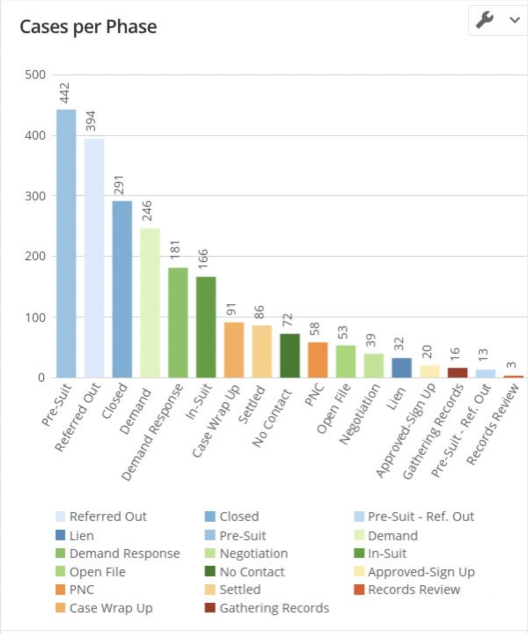
Deadline Type	Client Full Name	Project Name	Project Phase	Due Date	Done Date	Deadline Notes
Pleadings: Pleading Deadline	XXX Test Fake Test	Berman & Simmons Test Case	Non-Case Projects	05/17/1209		
Pleadings: Pleading Deadline	XXX Test Fake Test	Berman & Simmons Test Case	Non-Case Projects	05/31/1814		
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 Respt's Answers/Responses to Discovery	Miriam A. Johnson	MAJ - Personal Account	Non-Case Projects	08/01/2011		L/D for Respt'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



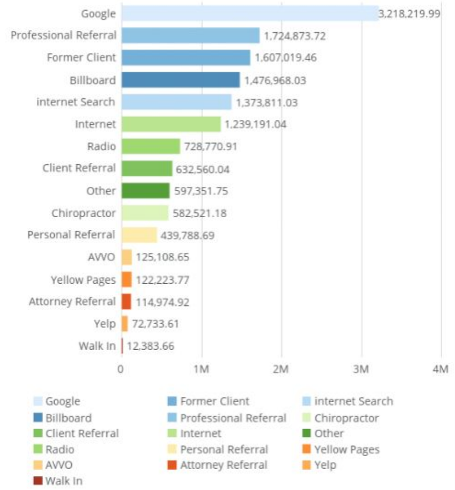


KPI Tracking

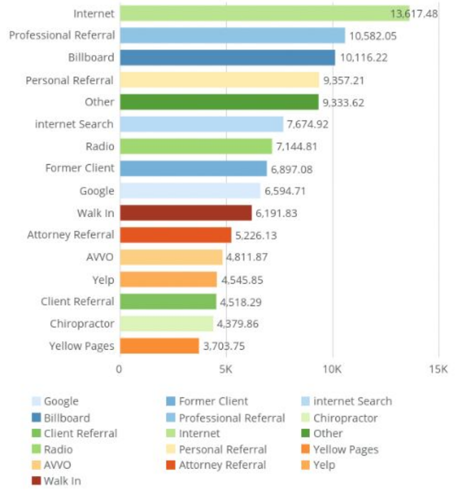
Settlement Dashboard

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	$3,019
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.

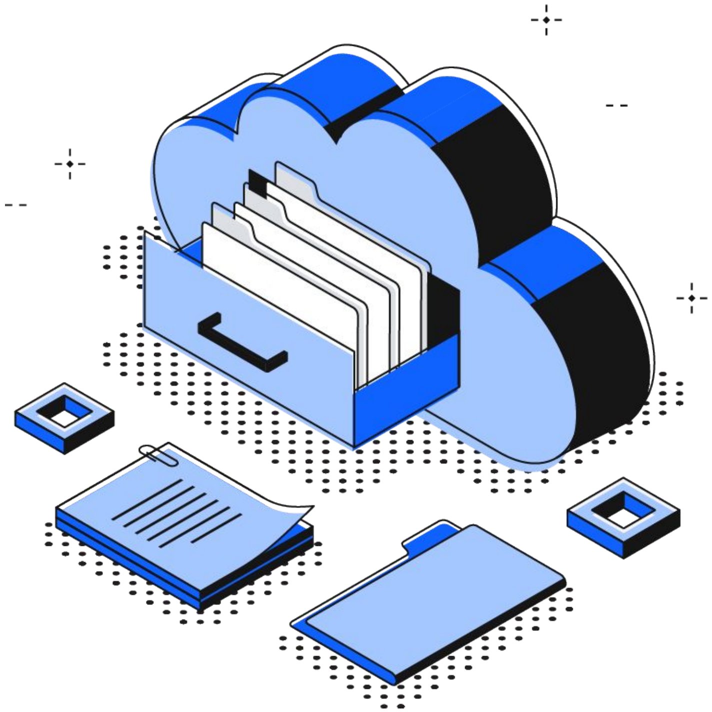
What's New for Docs+

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

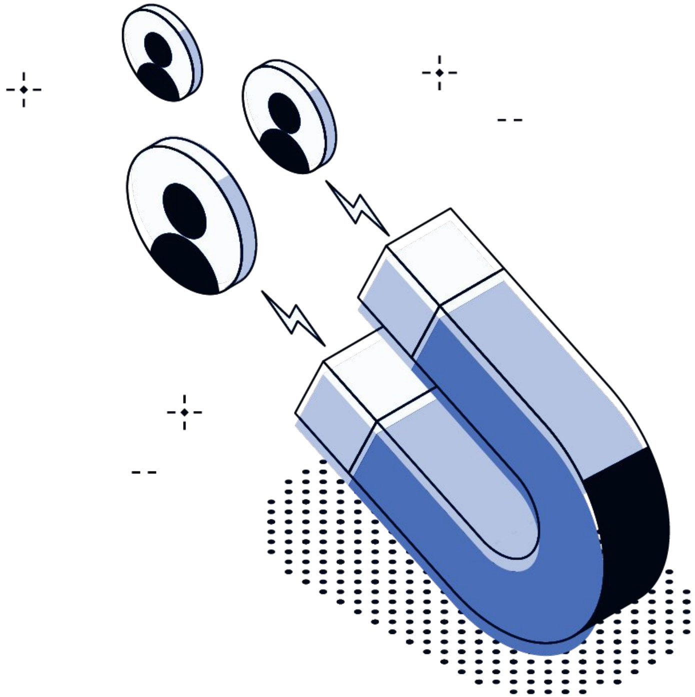
Custom Contacts

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

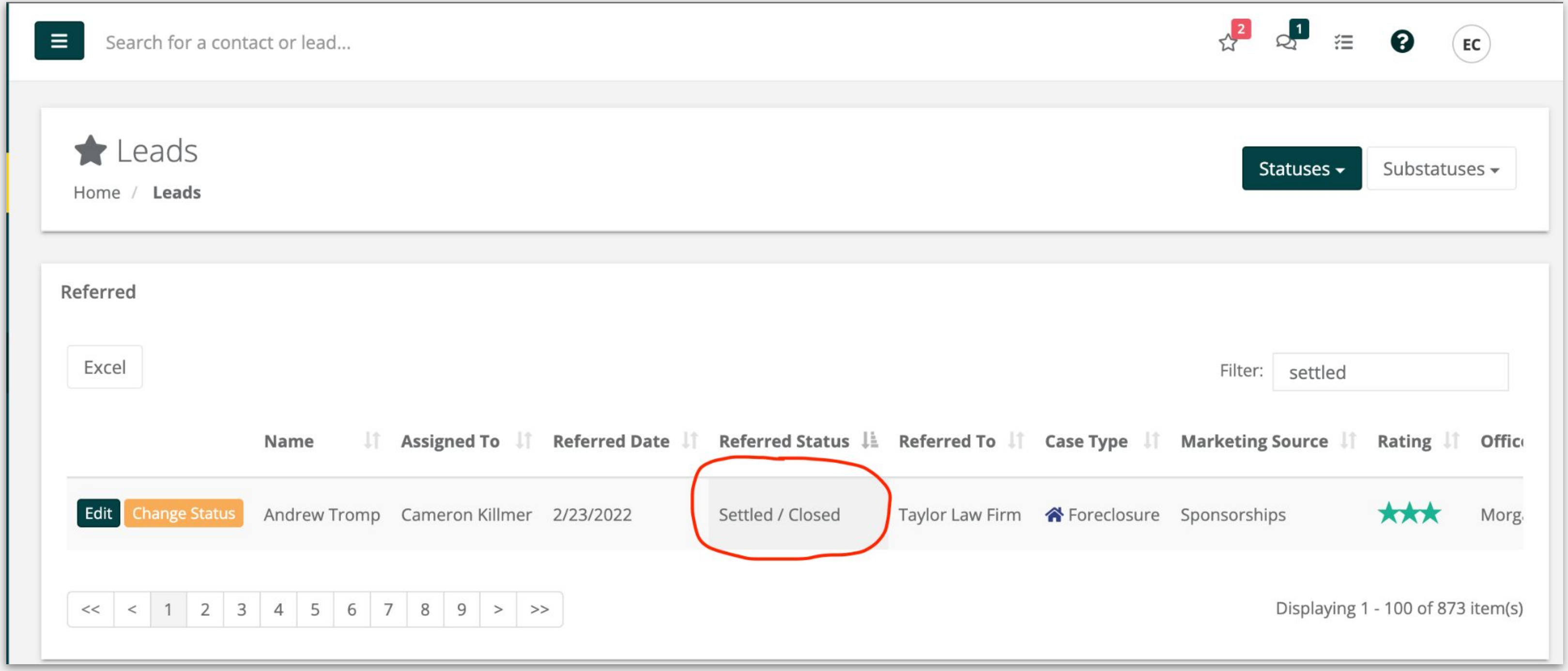
Customize roles to optimize your team, tasks, and workflows



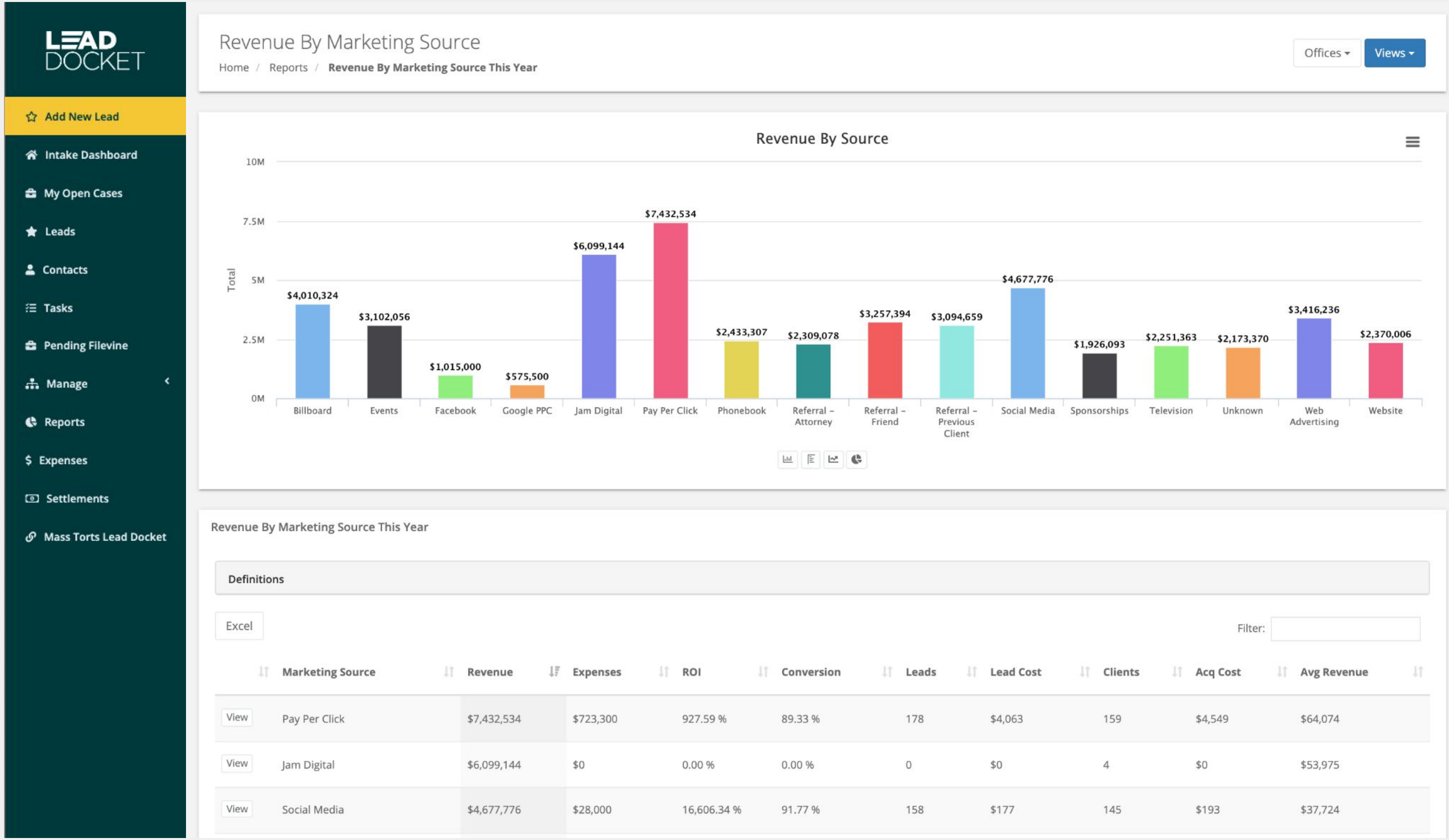
Take your lead management to the next level

Tips and tricks for success with Lead Docket

Get the Most Out of Your Referrals



See the Full Picture with Reports



Vinesign

Make eSignature Work for You

Vinesign as a Competitive Edge

Product Area

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

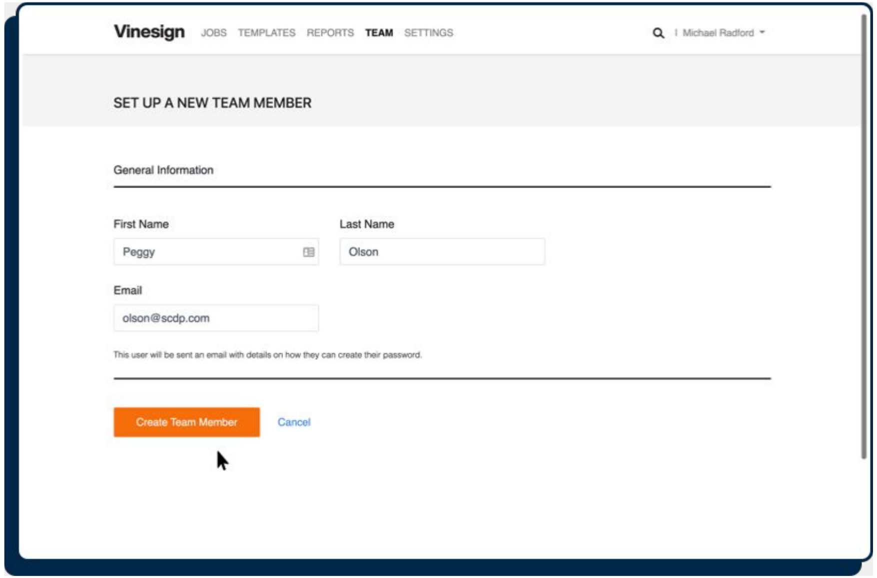
Benefit

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



- 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

Filevine Connect '22

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

Filevine Connect '22

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 communicatio n 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!

Filevine Connect '22

Thank you