

LEAP Expedite Toolbar

 Save & Close	Saves and closes document	 Toggle LEAP Fields	Shows fields in document rather than text
 Save	Saves document without closing	 Convert Fields to Text	Converts fields into plain text
 Update	Refreshes all field data in document	 Replace References	Changes fields to another table type e.g. from Vendor to Agent
 Rename	Alters name of Document	 Enclosures Text	Inserts 'Encl' into document
 Delete	Deletes document from database	 Apply Container	Applies a new container to document e.g. change Letter to Fax
 Cancel	Closes document without saving	 Format Fields	Alters format of field i.e. date, number, text
 Bring to Front	Brings LEAP Expedite to the forefront	 Multiple Print	Prints same document for multiple parties
 Insert Field	Allows fields to be inserted into document	 Save As	Saves document outside of LEAP Expedite
 Run LEAP Fillin	Asks all questions in document	 Email Document	Attaches document to an email



LEAP Expedite Quick Guide



Firms using LEAP make more MONEY

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Downloading and Accessing LEAP Expedite

LEAP Expedite is a simple and efficient way to manage your matters. It incorporates Smokeball forms and precedents and automates these documents for you.

Downloading the program is quick and easy, simply go to www.leapexpedite.com.au, click the download now button and follow the prompts.

Once installed there will be a new icon on your desktop called LEAP Expedite. Double click the icon on your desktop and enter your username and password and click ok. The matters screen will then display and you are all ready to go.

Clients and Matters

LEAP Expedite matters are made up of Cards and Forms. Cards contain details of people and organisations such as addresses, phone numbers and email addresses. Forms contain details specific to the relevant matter – e.g. a Conveyancing matter could include Property, Purchase Price etc.

■ Creating New Matters

1. Click on **New** at the top of the matters screen;
2. Choose a Matter Category and a **Matter Type**;
3. Complete the **Matter Details** screen;
4. Enter **Client details**;
5. Complete all relevant details that you currently have available for the matter and click **Save & Close** in the top left hand corner.

■ Entering Details into a Card

To create a new card in LEAP Expedite:

1. Click on relevant **table type** in matter e.g. **client, vendor, other side** etc;
2. Choose **Organisation** or **Person** at the top of card;
3. Enter in the Person/Organisation full name,
4. If a person, also include salutation and enter phone and email address;
5. If Organisation, choose appropriate type of organisation e.g. **Company, Government Department** and complete ABN;
6. Complete Address, Phone Numbers and Email Address fields on Address/Phone Numbers tab;
7. Click on each tab and complete the relevant details.

■ Adding more than one Person to a Card or Matter

To a **card**, if they live at the same address:

1. Open card;
2. **Right click** on Name;
3. Click **Add Person**.

To a **Matter**, if they live at separate addresses:

1. Open Matter;
2. **Right click** on Table Type heading e.g. Purchaser, Other Sides Solicitor etc;
3. Click **Add another 'Client' to the matter** or Add Multiple Client which allows you to choose an already existing card.

■ Adding Details to Forms

1. Click once on the relevant **Table Type** e.g. **Property, Court Details** etc;
2. Complete relevant available details by tabbing through the fields and tabs;
3. To add a second form to the matter (if applicable), right click on the Table Type heading and select the option **Add another...**

■ Searching and sorting for Matters

1. The matters screen is split into 6 columns you can sort the matters by any of these columns by clicking on the **column heading**.
2. At the top left hand side of the matters screen there is a dropdown menu so you can display all matters or just current matters.
3. There is a **search button** located at the top right hand side of the matters screen. This allows you to search by file number, client, matter type, instruction date and status.

Creating Documents

To create a letter or fax to your client or any other party in a matter:

1. Open the relevant matter;
2. Click on the **New Document** button at the top of the matter. Select the relevant container e.g. New Letter, New Fax etc, select the recipient of that document and click **OK**;
3. The document will open and merge with the relevant party details. You can now type your document, print it and click **Save** on the **LEAP Expedite Toolbar**.

Editing Containers

To edit document containers so they contain your firm's letterhead and formatting:

1. Open a matter and click **New Document** at the top of the matter and select **New Basic Document**;
2. **Right click** on the relevant container e.g. Letter, and click **Edit**;
3. You can make any changes you like to the container, save it on LEAP Toolbar and all the changes will apply to any letters and precedents you create from then on;
4. Repeat process for Fax, Memo and Blank Document.

Note: Do not delete any fields in the containers. If the fields are deleted they will not be able to be reinserted.

Emailing

To send an email to your client or any other party in the matter:

1. Open the relevant matter;
2. Click on the **New Document** button at the top of the matter and select New Email.
3. **Outlook** and a new email will open. Type your email and send.

Precedents

■ Generating a Precedent

1. Open the relevant Matter;
2. Click once on the **Use Precedent** button;
3. LEAP Expedite will display the relevant precedents depending upon the matter type open;
4. Double click on the relevant precedent;
5. The precedent will open and merge with the relevant fields completed from your matter;
6. Once you have made the necessary changes and printed the document click **Save** on the LEAP Toolbar.

■ Creating a New Precedent

1. Open the relevant Matter;
2. Click once on the **Use Precedent** button;
3. LEAP Expedite will display the relevant precedents depending upon the matter type open;

4. **Right click** anywhere on the precedent screen and click **New Precedent**;
5. The container screen will display, choose the relevant container and recipient of the precedent;
6. The precedent will open and merge. Now type your text in the body or cut and paste from word;
7. Click **Save** on the LEAP Toolbar.
8. To modify a precedent, right click on the document and click **Modify Precedent**.

■ Searching for Precedents

1. To sort the precedent screen in alphabetical order click on the **column headings** at the top of the precedent screen.
2. To search for a precedent, click on the **search** button on the right hand side of the precedent screen. This will take you to the Smokeball website where all our precedents are downloaded from. Type the name of the document you are looking for into the search box at the top right hand side of the webpage and click search.

Hints & Tips

■ **LEAP Expedite works offline** – You do not have to be connected to a network to access LEAP Expedite. Therefore the program is portable and you are able to take your laptop with you to appointments or work from home easily as long as you have already downloaded the precedents and matter types needed. You do however need to be connected to a network to download new precedents or updates to precedents, new matter types and new versions.

■ **Viewing document/precedent history** – You can view the history of a document or precedent by right clicking on the document. The latest version will be in bold and underlined. You are able to view previous versions by right clicking on that version and choosing View Document/Precedent, you can also set that version to be the current version.

■ **Right clicking** – on pretty much anything in LEAP Expedite can be a very useful tool. Right clicking on a matter in the matters list will allow you to delete the matter. Right clicking on a document in a matter also allows you to delete, rename, open or get info on the document. Right clicking on a heading in a matter gives you a list of advanced options. Try right clicking on anything and see what happens.