LawStream Pro Startup Instructions

When you receive your new LawStream Pro program, you will also receive a startup database for your firm. We require the following basic information from you in order to set up that database for you. Except for the firm name, any of these preferences may be changed as you become more familiar with the system. Please note that there are many more options available under the Setup menu. These items are the essentials that need to be in place before you can start entering your client and file information.

1. General Ledger Codes

Three "off the shelf" sets of general ledger codes are available (A, B and C examples attached). Please ***circle your choice*** below. If you select "Custom General Ledger Codes", please add $100 to the total amount on your credit card authorization and provide us with a detailed code list to be entered.). Please note that GL codes may be changed after the fact but some of the codes are used as "defaults" when you are setting up clients and files. Once you have all your clients and files set up, it would be a big task to go back and change all the defaults to match your new code list.

Example A: U.S.A. or Canada	Example C: U.S.A. or Canada
Example B: U.S.A. or Canada	Custom General Ledger Codes (attach details)

2. Firm Information

Firm Name (as it will appear on billings and other reports)	
Firm Address	
Firm Description (Attorneys At Law, Graphic Designers, etc.)	
Phone Number	
Fax Number	

3. User Information

User-access initials may be one, two or three characters and must be unique. Please attach additional list if you need to add more names.

User Name	*User Access Initials*	*Usual Hourly Billing Rate*
Example: Sandy Jones	*SJ*	*$250*

4. Basic Billing Preferences

These preferences may be easily changed when you receive the system but some basic preferences are necessary in order for LawStream Pro's billing system to function properly.

Question	***Please circle your preference***	
Which rate is usually used on billings?	Timekeeper Rate	File Rate
Show previous unpaid balances on new billings?	Yes	No
When do you want to post bills to the general ledger?	Immediately after producing the billing	Later, after paper copy is checked.
Which name should be shown at bottom of the Billings? (both may be shown if you prefer)	User Name	Firm Name
Do you wish the dollar amount to show on each time entry for detailed billings?	Yes	No

Text Preferences	***Please add the text you want for each preference***
Heading (if any) to appear at the top of the first page of client billings/accounts (e.g. "Account", "Statement of Account", etc.)	
Text (if any) to appear at the end of time entry details in billings (…and all other necessary attendances… or whatever you wish)	
Text confirming payment in full when the balance on a billing has been paid via trust transfer (…"Paid in Full"… or whatever you wish)	
Text (if any) to replace "Our Account to You" next to the total on client bills	
Footer (if any) to appear at the bottom of billings (could include interest rate policy, credit card policy, payment expectations, tax numbers, etc.)	

5. Interest on Overdue Accounts

If you normally charge interest on overdue accounts, please indicate the annual rate and the number of days before interest is charged (e.g. 18% and 30 days)

Please fax your completed instructions to 250-247-8000 or attach it to an email message and send to sales@LawStream.com.