

AL Demo Study Guide

- **AL Overview**
 - 2-3 minutes AbacusLaw "Elevator Pitch" describing the product, its value, and core functionality
- **Understand Staff/Role types & responsibilities**
 - Owner/Partner
 - Attorneys
 - Legal Assistants/Paralegals/Secretaries
 - Office Administrators
- **Understand the basic practice areas provided by a legal office**
 - Personal Injury
 - Civil Litigation
 - Family Law
 - Immigration
 - Estate Planning
 - Real Estate
 - Criminal Defense
 - Workers Comp
- **Understand the basic features needed to run a legal office**
 - Intake Process
 - Calendaring
 - CRM
 - DMS
 - Forms Generation
 - Time Tracking and Billing
 - Accounting
- **Must be able to demonstrate core aspects of AbacusLaw functionality**
 - PALS (Practice Area Legal Solutions)
 - Intake Forms
 - Rules Based Calendaring
 - Document Generation
 - Time Tracking (via Notes, Event, Emails)

- **Understand customizations and reporting capabilities**
 - Name and Matter Screens
 - Intake Forms
 - Rules
 - Reports
 - Forms
- **Time & Billing**
 - Must understand the basic needs for time capture & billing in a Firm (Daily Tasks)
 - Must understand Billing Process (Pre-Bill, Print Bill, Post Bill)
 - Must understand Rate Levels (or Rate Sets)
 - Reporting
- **Understand the different methods of billing**
 - Hourly
 - Flat Fee
 - Contingency
 - Task Based Billing (otherwise known as LEDES Billing)
- **2-3 min Pitches and a basic understanding for remaining sections**
 - Notes
 - Events
 - Documents
 - Emails
 - Global Search
 - Conflicts of Interest
- **Understand basic integration functionality and products**
 - QuickBooks
 - Outlook/Exchange
 - Add-ons
- **Product Demo**
 - Be able to fully demonstrate these items live and within a 45-minute period (**Review “Perfect Demo” and be able to replicate**)

