

Have needy clients? Admin staff out on vacation? Your child used your planner/calendar as a coloring book?

**KEEP
CALM.
THERE'S
AN APP
FOR THAT**

Special Thanks to Paulino Estevez, esteemed office manager, for this amazing Powerpoint!

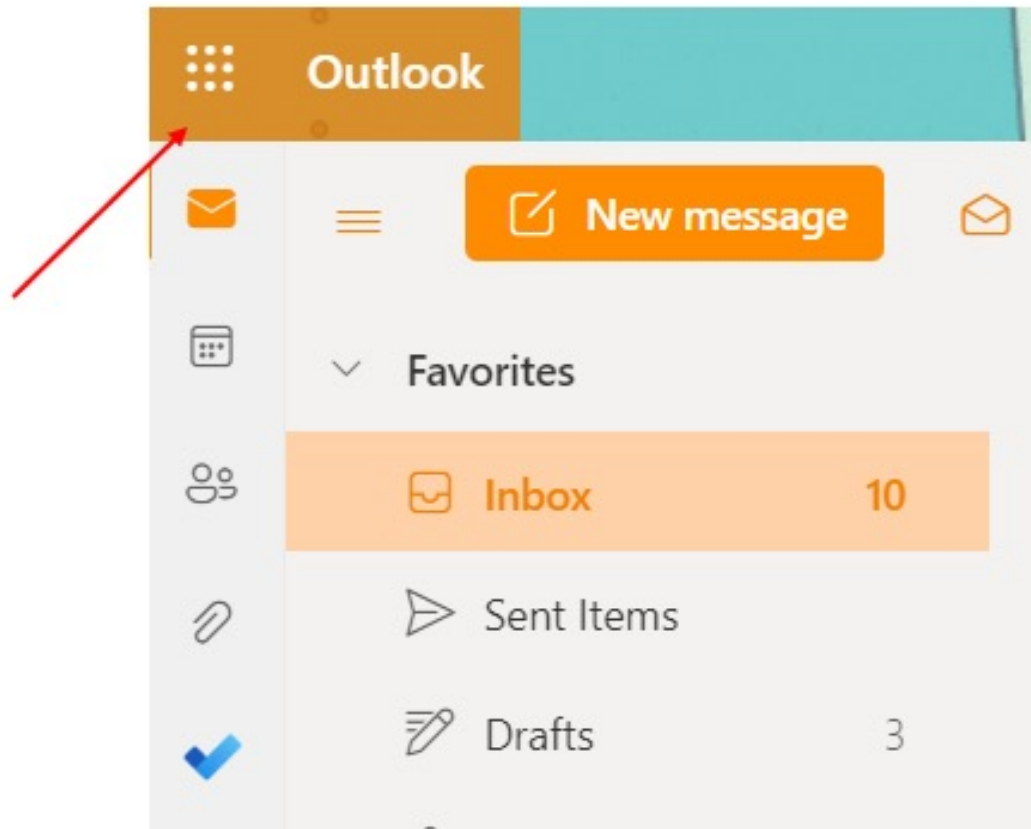


Bookings



What is Bookings?

- Bookings is a Microsoft 365 application that syncs with your calendar and allows clients to book their own appointments.
- Benefits:
 - Gives clients the autonomy to book on their own time
 - Free up your admin staff's time (or better yet, YOUR time) to focus on other productive matters.



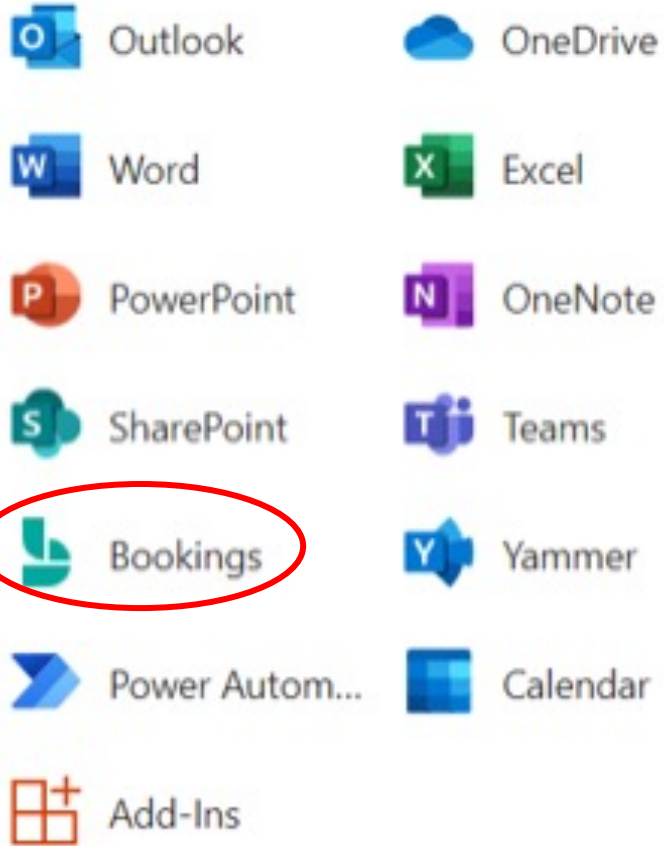
But wait! How does it work?!

If you have Microsoft 365, you can search for Bookings by clicking the little squares in the upper left corner of your web browser, from any Microsoft 365 application page.

NOTE

Make sure you are doing this through your web browser, NOT from the app on your desktop.

Microsoft 365



If you don't see the Bookings app, click "All apps" and search for the Bookings integration.

**A consult and a
depo?!?**

**How do I prevent
conflicts?!**

Unless you can use Hermione's
time turner and be in two
places at once, you probably
want to avoid being double
booked during a single time
slot.

You can set/limit your Bookings
calendar to only allow
appointments to be scheduled
during the days/times that work
best for you.




Integration!




















- First, set your availability.

Availability

In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below.

General availability:

Custom hours (recurring weekly) 

Monday	1:30 PM 	4:30 PM 		
Tuesday	1:30 PM 	4:30 PM 		
Wednesday	1:30 PM 	4:30 PM 		
Thursday	1:30 PM 	4:30 PM 		
Friday	Not bookable			
Saturday	Not bookable			
Sunday	Not bookable			

Availability during these dates:



Start

End (inclusive)

7/14/2022




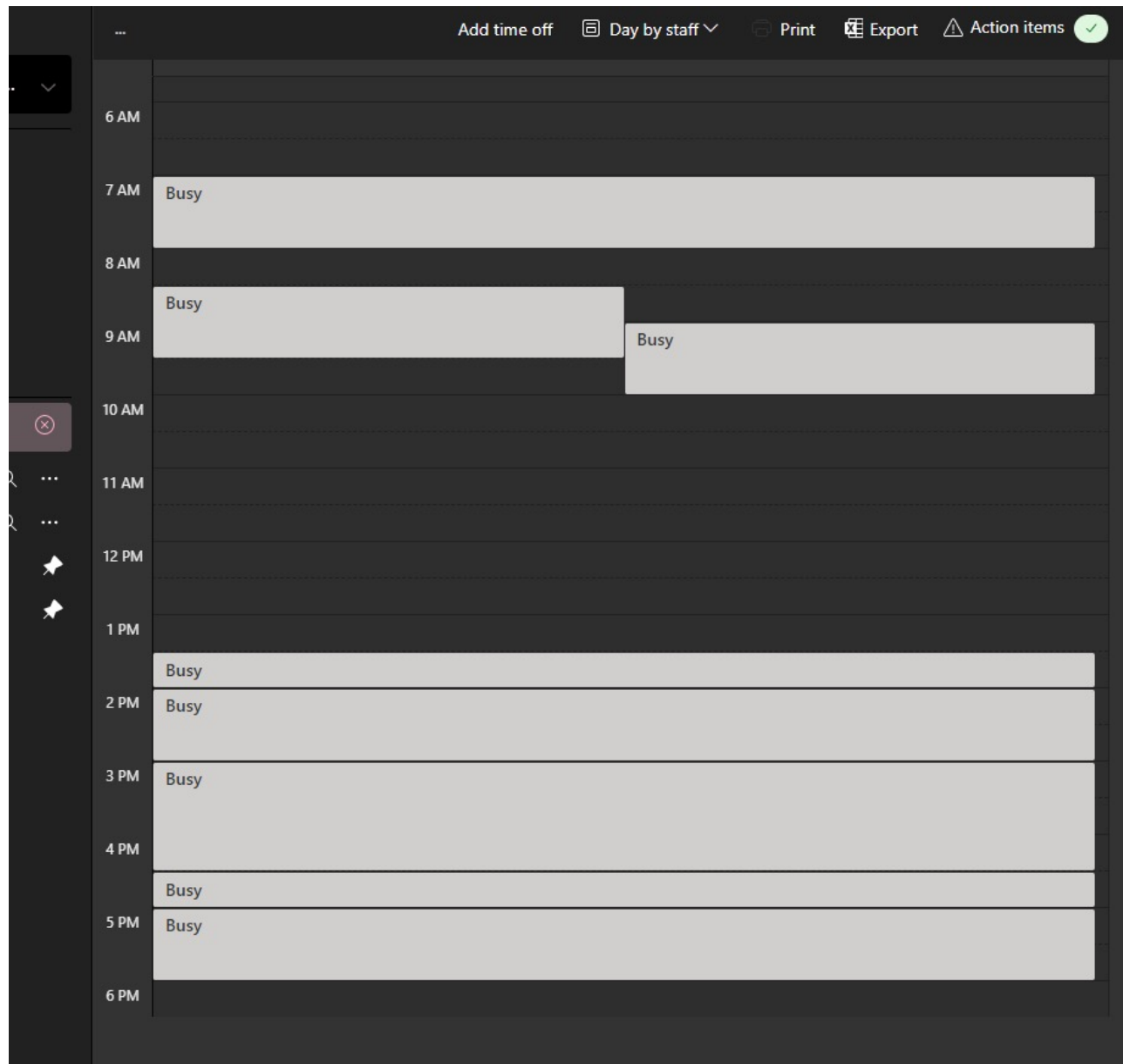
7/15/2022



Not bookable



 Set different availability for a date range



Next, let the
integration
begin!

Other
helpful
settings.



Default scheduling policy

Default scheduling policy, availability,
notifications and staff settings



Time increments

Show available times in increments of

15 minutes



Minimum lead time

Minimum lead time for bookings and
cancellations

48 hrs



Maximum lead time

Maximum days a booking can be
made advanced in

60 days



Email notifications



Notify the business via email when a booking is created or changed



Send a meeting invite to the customer

Staff control



Allow customers to choose a specific person for the booking

Christie Guerrero's Calendar

✓ SELECT A SERVICE

<p>30 Minute Teams Meeting <input type="radio"/></p> <p>30 minutes 🌐</p>	<p>60 Minute Teams Meeting <input type="radio"/></p> <p>1 hour 🌐</p>
<p>60 Minute Phone Call <input type="radio"/></p> <p>1 hour</p>	<p>30 Minute Phone Call <input type="radio"/></p> <p>30 minutes</p>

Booking for **30 Minute Teams Meeting**

September 21

📅 DATE

🕒 TIME

< > September 2022

3:30 PM

3:45 PM

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

🕒 All times are in (UTC-05:00) Eastern Time (US & Canada)

📄 ADD YOUR DETAILS

Name

Name

Email

Email

Address (optional)

Address (optional)

Phone number

Select country code

Notes (optional)

Add any special requests

- What the clients see



Pro Tip!

Sincerely,

[Christie L. Guerrero, B.C.S.](#)

Board Certified Family Law Attorney

Sasso & Guerrero

9191 R. G. Skinner Pkwy, Suite 703

Jacksonville, Florida 32256

Phone: (904) 619-1386

If you would like to schedule an appointment with me, please click [here](#).

If you would like to make a payment towards your account, please click [here](#).

Here's what my calendars looks like.

Client Contact Time

	Jan 1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat
8 AM							
9 AM							
10 AM		CLG- Pressing Client Phone Calls	CLG- Pressing Client Phone Calls	CLG- Pressing C	CLG- Pressing Client Phone Calls		
11 AM							
12 PM							
1 PM							
2 PM		CLG- Scheduled Appts.	CLG- Scheduled Appts.	CLG- Scheduled Appts.	CLG- Scheduled Appts.		
3 PM							
4 PM							
5 PM							
6 PM							

Office Events

	Jan 1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat
8 AM							
9 AM		CLG- E mails	CLG- Emails	CLG- Emails	CLG- Emails	CLG- Emails	
10 AM		Staff Christie Gue		CLG- Recurring check Christie Guerrero		CLG/SD Weekly Caserun Christie Gue	CLG- Planning Time
11 AM		CLG- Production	CLG- Production	CLG- Me Christie Gue	CLG- Production		
12 PM				CLG- Production	CLG- Production	Private A ppointme	
1 PM		CLG- Staff Check-Ir	CLG- Staff Check-Ir	CLG- Staff Check-Ir	CLG- Staff Check-Ir		
2 PM						CLG/MLS Standing Christie Guerrero	
3 PM							
4 PM		CLG- Safety Zone	CLG- Alyssa Girl Scout	CLG- S	CLG- Safety Zone	CLG- Safety Zone	
5 PM							
6 PM		Private Appointi		Private Appointi		Private Appointi	



Don't worry
Cory, it's
not as scary
as it looks.

Ready for more automation?

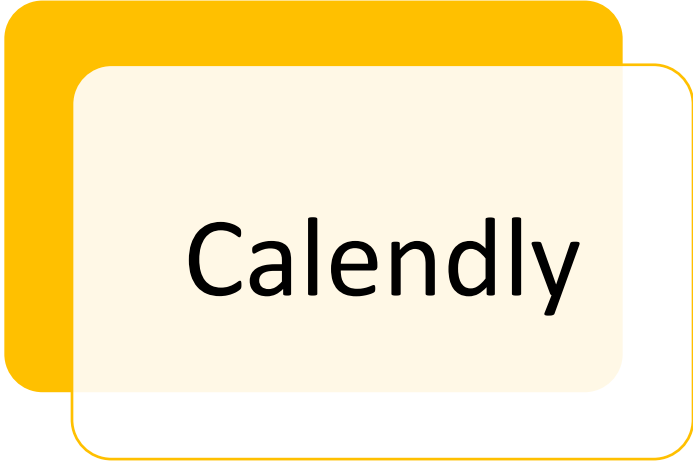
Similarly, many client management programs also have a similar function for potential clients.

Once you get the client through the intake process, and a conflict check has been completed, you can also create a link that potential clients can use to schedule (and pre-pay!) their consultation appointments.

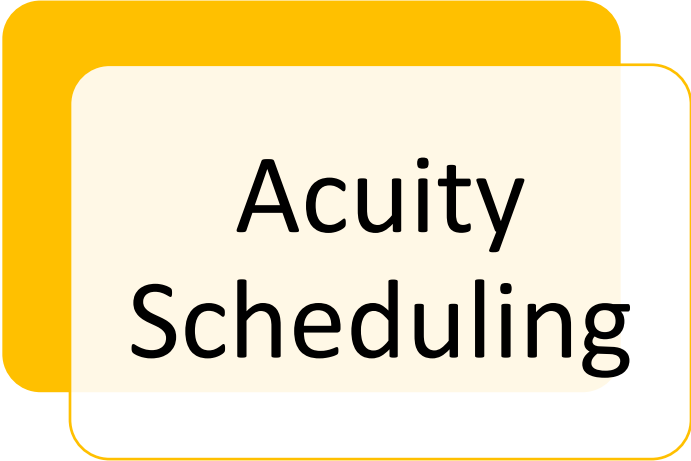


For those who have Clio, you can read this article [here](#) for further information on Clio scheduler.

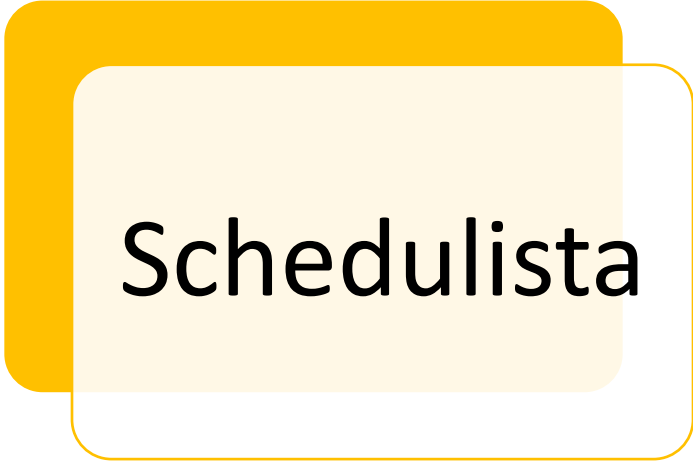
Other Popular Calendar Apps

The logo for Calendly features a solid yellow rounded rectangle in the background. Overlaid on this is a white rounded rectangle with a thin yellow border. The word "Calendly" is centered within the white rectangle in a black, sans-serif font.

Calendly

The logo for Acuity Scheduling features a solid yellow rounded rectangle in the background. Overlaid on this is a white rounded rectangle with a thin yellow border. The words "Acuity" and "Scheduling" are centered within the white rectangle in a black, sans-serif font, stacked vertically.

Acuity
Scheduling

The logo for Schedulista features a solid yellow rounded rectangle in the background. Overlaid on this is a white rounded rectangle with a thin yellow border. The word "Schedulista" is centered within the white rectangle in a black, sans-serif font.

Schedulista

Issues with getting your client's discovery?



Yup, there's an app for that, too!



pipe | file

What is pipe file?

Pipe file is kind of like Dropbox, only better!

- Clients upload their documents to one central location, in an organized fashion.
- You create the organization for them!





Using it as a check list for mandatory disclosure will help alleviate dealing with the Grogus ("Baby Yoda" for the uninitiated) who can't seem to stay on track.

Your main dashboard.

Here you will be able to create, send, and monitor document requests for each individual client.

pipe | file

Support 

New Request + 

Search Requests

Profile

All Requests


Sent


Responded


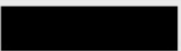





Expired

Completed

Archived

☐ 

Filter Requests 

<input type="checkbox"/>		Mandatory Disclosure	0 / 17	Sep 12
<input type="checkbox"/>		Mandatory Disclosure	12 / 17	Aug 4
<input type="checkbox"/>		Mandatory Disclosure	16 / 17	Aug 4
<input type="checkbox"/>		Mandatory Disclosure	0 / 17	Jul 20
<input type="checkbox"/>		Mandatory Disclosure	2 / 17	Jul 14
<input type="checkbox"/>		Documents	1 / 1	Jul 13
<input type="checkbox"/>		Document Upload	1 / 1	Jul 10

pipe | file

New Request +



Create from Template

Profile

All Rec

Search

Sent

Request for Production

Resp

Mandatory Disclosure

Expi

Sample Open-Ended

Com

Sample Checklist

Archived


- The first step is to create a template of the documents you want your client to send to your client, e.g. mandatory disclosures.
- Once you create a template, you can use it again and again.


After you've completed a template, you can begin sending requests to clients.

Here you will enter the client information, and anyone you want to copy. You do not need to copy yourself, since you as the user, will receive notifications once the client has completed uploading all the requested items.

You can even set reminders, so Grogu stays on track before Mando files a Motion to Compel.

pipe | file

Support 

New Request + 

Search Requests

Profile

All Requests

Sent

Responded

Expired

Completed

Archived

Create New File Request


Recipients

Grogu

christie@familylawyerjax.com

Add CC Recipient

Reminders


Send Every 7 Days 


Expires 10/13/2022

Once the template is sent to the client, they will see something like this, with several user-friendly upload options.

Income Tax Returns

tax returns filed by you or on your behalf for the past 3 years, including all attachments, Forms W-2, 1099, K-1, and all accompanying schedules and worksheets comprising the entire tax return.

[Attach Files](#) 


Advanced 



IRS forms W-2, 1099, and K-1

IRS forms W-2, 1099, and K-1 for the past year, if the income tax return for that year has not been prepared. If income tax returns have not been filed for any of the prior 2 years beyond the past year, the IRS forms W-2, 1099, and K-1 for those prior 2 years as well.


[Attach Files](#) 

Advanced 

Financial Disclosure

All loan applications, financial statements, credit reports, or any other form of financial disclosure, including financial aid forms, prepared or used within the 24 months preceding compliance with these disclosure requirements, whether for the purpose of obtaining or

[Attach Files](#) 

Advanced 



Deeds and/or Lease Agreements

All deeds evidencing any ownership interest in property held at any time during the last 3 years, all promissory notes or other documents evidencing money owed to you (or the other party) at any time within the last 24 months, and all leases, whether held in your

[Attach Files](#) 

Advanced 

When the client has responded to all requests, you will get a notification via email indicating all documents have been submitted.

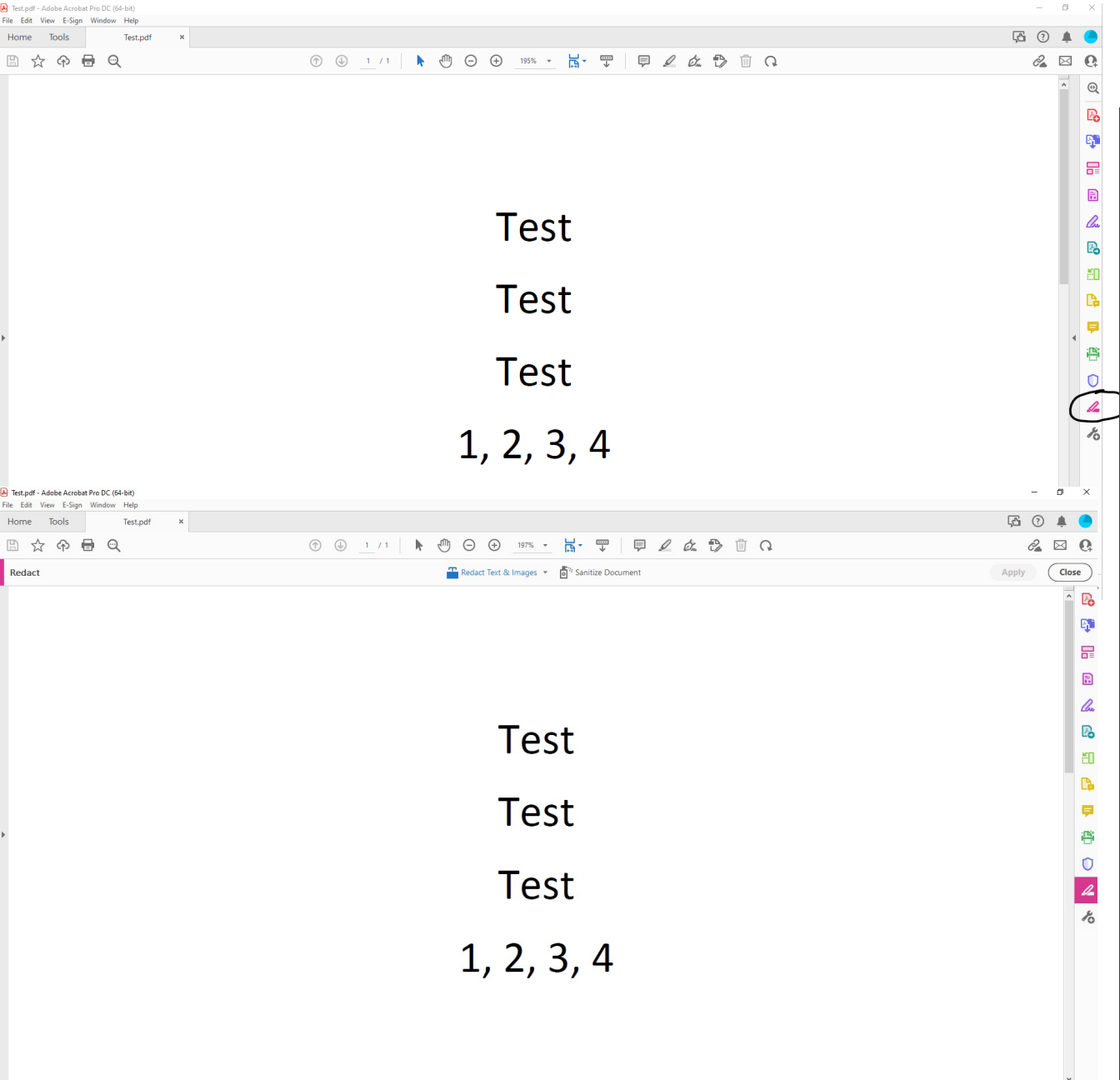


Finally, Grogu has submitted his mandatory disclosure. We are at the deadline to submit it before we get that Motion to Compel.

However, to avoid Jabba the Hutt stealing Grogu's identity, we need to redact his social security information in the event Grogu's financial disclosure gets entered into evidence.

Luckily, Adobe allows us to do this.

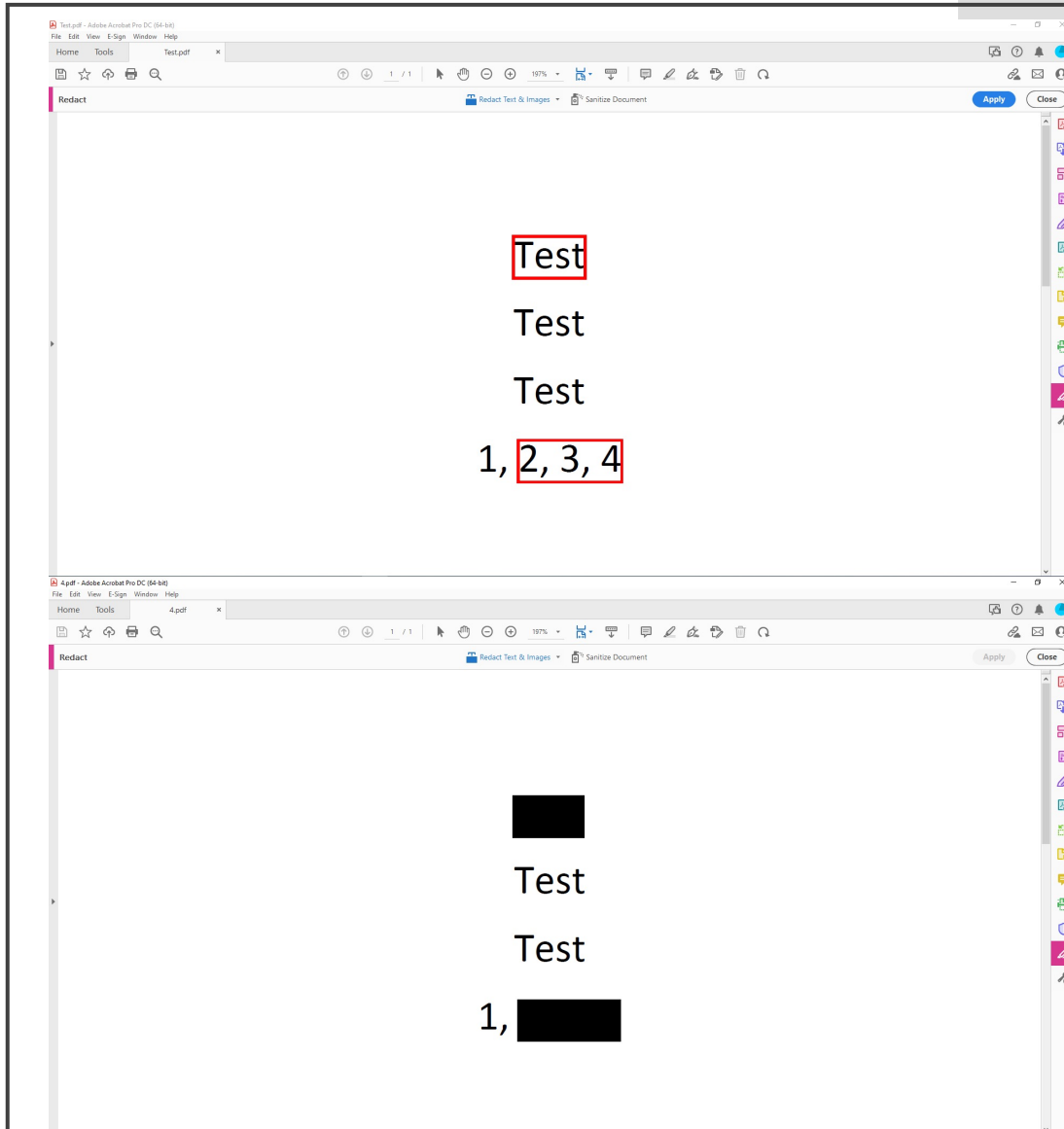




Aside from viewing PDFs, Adobe can help us redact sensitive information. Once you have opened your PDF document, there is a small redaction icon you will need to select.

Once you select what you wish to be redacted, a red outlined box will appear around it. Once you have chosen everything you would like redacted, click the “apply” blue icon on the top panel.

Now that you have selected everything you wish to redact, a black box should appear around the information you don’t want Jabba to see. Not only are you being eco-friendly, but this also saves time having to do the old-fashioned way of marking with black marker. Plus, sometimes you can still see the information, so most of the time you will have to copy what you just redacted. Wasting MORE paper!



Bates Stamping

- Ok, so Mando's attorney filed a Motion for Temp Needs. He's alleging that Grogu's pension from the Jedi Council can support the payment on a new spaceship.
- We need to file Grogu's pension statement as an exhibit indicating he cannot afford to support Mando's client, so we need to label it as an exhibit.

W2 Grogupdf - Adobe Acrobat Pro DC (64-bit)

File Edit View E-Sign Window Help

Home Tools W2 Grogupdf x

1 / 1 154%

a Employee's social security number 123-45-6789		Safe, accurate, FAST! Use IRS e-file Visit the IRS website at www.irs.gov/e-file	
b Employer identification number (EIN) 11-2233445		1 Wages, tips, other compensation 48,500.00	2 Federal income tax withheld 6,835.00
c Employer's name, address, and ZIP code The Mos Easley Cantina 123, Desert Rd. Tatooine, Galaxy Far Away 9999		3 Social security wages 50,000.00	4 Social security tax withheld 3,100.00
		5 Medicare wages and tips 50,000.00	6 Medicare tax withheld 725.00
		7 Social security tips	8 Allocated tips
d Control number A1B2	9	10 Dependent care benefits	
e Employee's first name and initial Last name Grogu 1433 Forrest Lane		11 Nonqualified plans	
		12a See instructions for b D	12b DD
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	12c 1,000.00
		14 Other	

W2 Grogupdf - Adobe Acrobat Pro DC (64-bit)

File Edit View E-Sign Window Help

Home Tools W2 Grogupdf x

1 / 1 130%

Edit PDF

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[Watermark](#)
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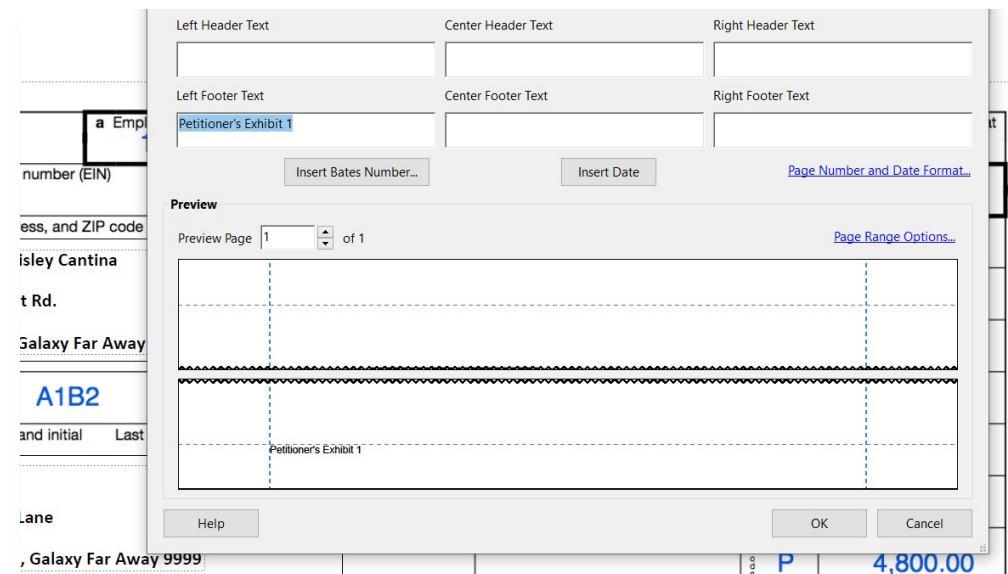
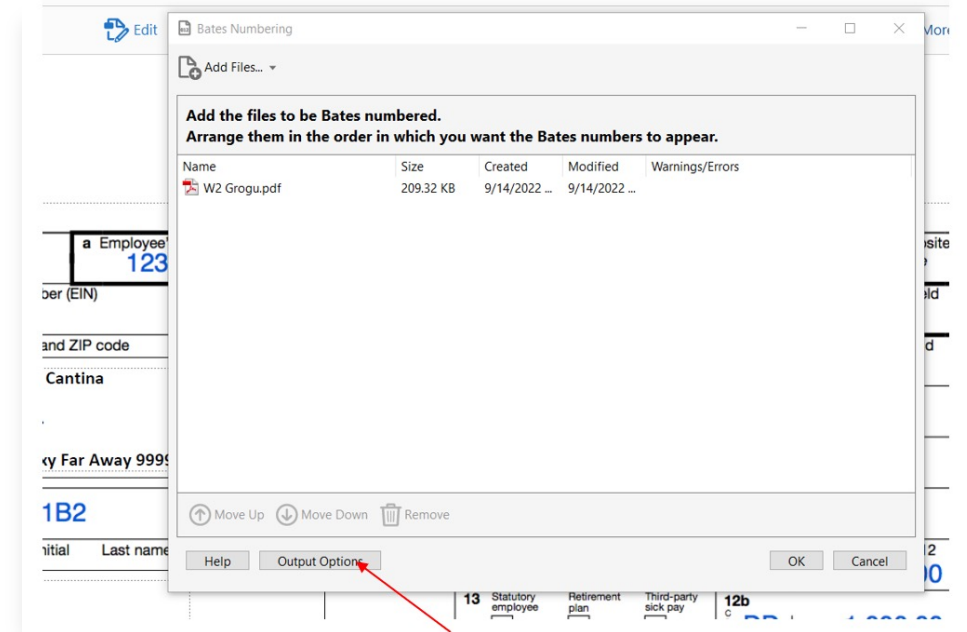
a Employee's social security number 123-45-6789		Safe, accurate, FAST! Use IRS e-file Visit the IRS website at www.irs.gov/e-file	
b Employer identification number (EIN) 11-2233445		1 Wages, tips, other compensation 48,500.00	2 Federal income tax withheld 6,835.00
c Employer's name, address, and ZIP code The Mos Easley Cantina 123, Desert Rd. Tatooine, Galaxy Far Away 9999		3 Social security wages 50,000.00	4 Social security tax withheld 3,100.00
		5 Medicare wages and tips 50,000.00	6 Medicare tax withheld 725.00
		7 Social security tips	8 Allocated tips
d Control number A1B2	9	10 Dependent care benefits	

Instead of buying the exhibit tabs from Office Depot, you can easily use Adobe to save you time. Simply click tools, and then edit PDF.

Once you select this, look at the top where it says more, next to "Watermark".

After clicking more, you should be able to select bates numbering, click Output options, then click Ok twice.

You should now be prompted to a window like this. Where you can now enter what you would like to label your exhibits, and the placement of the text, the size, and font. Here, we are calling this *Petitioner's Exhibit 1*.



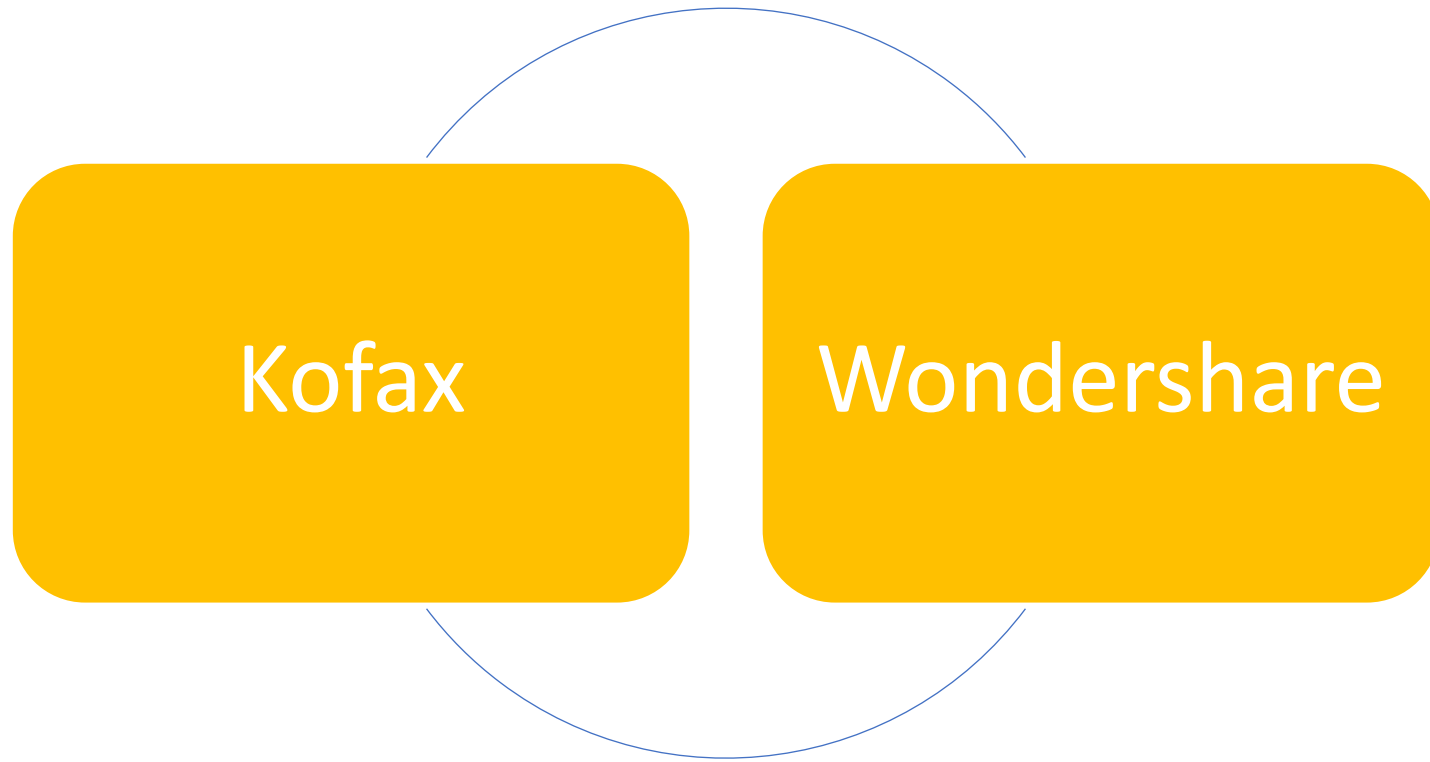
Here you can see the finalized document. Ready to be filed with the Clerk.

a Employee's social security number		Safe, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
6789		OMB No. 1545-0008			
b Employer identification number (EIN)		11-2233445		1 Wages, tips, other compensation	2 Federal income tax withheld
				48,500.00	6,835.00
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld	
The Mos Eisley Cantina 123, Desert Rd. Tatooine, Galaxy Far Away 9999		50,000.00		3,100.00	
		5 Medicare wages and tips		6 Medicare tax withheld	
		50,000.00		725.00	
		7 Social security tips		8 Allocated tips	
d Control number		A1B2			
e Employee's first name and initial Last name		Grogu		11 Nonqualified plans	
1433 Forrest Lane		Yoda's Planet, Galaxy Far Away 9999		12a See instructions for box 12	
				D 1,500.00	
				12b DD 1,000.00	
				12c P 4,800.00	
				12d	
f Employee's address and ZIP code					
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
PA	1235	50,000	1,535	50,000	750
				20 Locality name	
				MU	

Form **W-2** Wage and Tax Statement **2014** Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

Other Popular PDF Editing Programs



So, your admin staff is taking payments through the credit card machine, but it crashed.

Your paralegal is reviewing Grogu's mandatory disclosure, and

Your office is on the brink of shambles because your office manager is busy making the powerpoint for your Inns of Court presentation.

I think we all know the answer to this.



There's an app for that.

LAWPAY[®]

AN AFFINIPAY SOLUTION



What is LawPay?

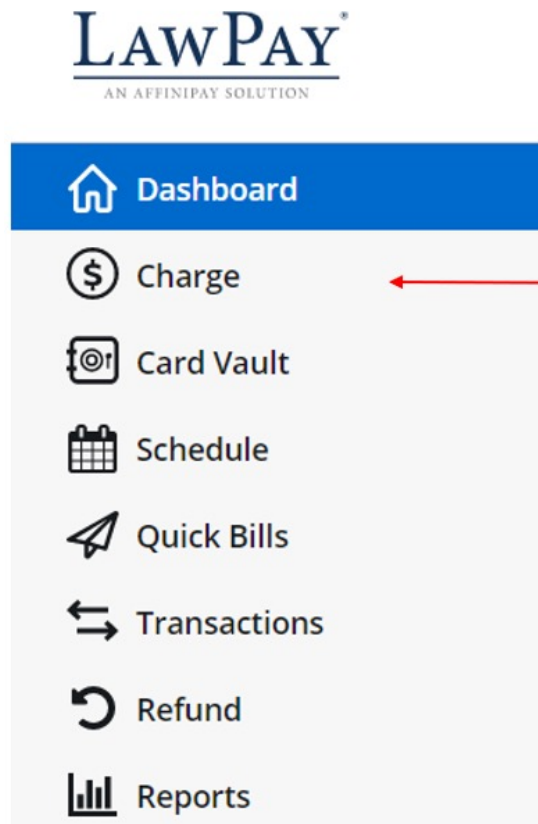
LawPay is an online payment system that links directly to your accounts. With a click of a button, clients can pay to retain your office, pay past due amounts, and save credit card information securely.

For Family Law firms, clients have the ability to make payments directly to your trust account, or operating account using their cards through a secure link. However, if you wish to save even more money, LawPay also allows clients to make direct payments from their bank accounts to yours.

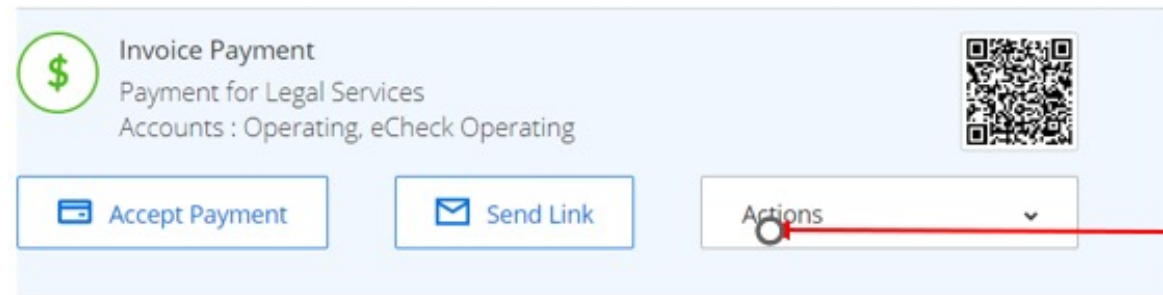
Best of all, LawPay can also be linked with most case management software, such as Clio or mycase. No double accounting! Just link the Lawpay payments to the appropriate case with the click of a button.

Once an account has been created, you should already have links created by LawPay support. To send a payment link you would then click charge.

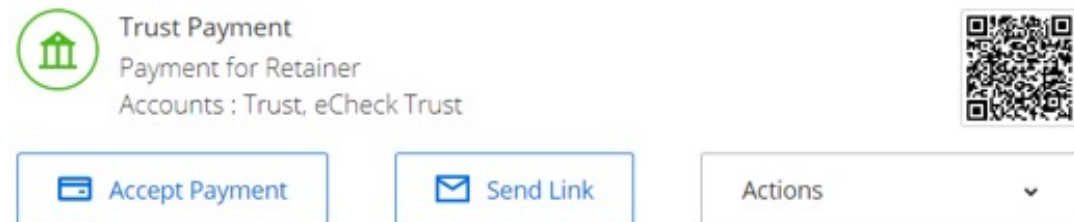
Then you would select which account, and select “send link.



Select a payment page to make a charge



Trust Payment Pages



Email Payment Page

Payment Page

Invoice Payment (Operating | eCheck Operating)

Amount

\$ 2500

Email Address

Grogu@downwiththedarkside.com

Reference

Sasso & Guerrero

Email Subject

Injunction Against Jaba the Hutt

Email Body

Dear Grogu,
For your convenience, our firm accepts payments online. To make a payment, please click the link below:

The following link will be added to the email:

<https://secure.lawpay.com/pages/mollylewissasso/operating?reference=Sasso%20%26%20Guerrero&readOnlyFields=reference&amount=2500>

☐ Send me a copy

Cancel

Send

Once you select the option to send an email, you should be able to send Grogu an email asking him to pay. You can also customize the email they will receive.

As soon as Grogu has paid, you will get a notification sent to your email indicating he has paid, so you can begin working on his case.

Funds are usually reflected withing 2-3 business days in your bank account.

Law Pay Reports

However, one the most useful qualities LawPay has to offer, is that you can generate reports to view and assist on keeping track of any goals you would like to set.

It's also very helpful when balancing your accounts, or if you wish to get an overview of all who has paid.

