

Using Extend as a Workflow Tool

Slide 1

sw1

swirtz, 8/16/2010

Electronic Billing

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Clients Related to E-Billed Clients Without E-Billing Tag

Reason for Notification: Specified Email Address

Related Client# Client #	Related Client Client	3RD Party
209196	██████████ MART STORES, INC.	DATACERT
216396	██████████ STORES, INC. - LICENSING	
210813	██████████ TOOL WORKS INC.	TRIPOINT
216390	██████████ . WORKS, INC.	

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

E Billing Clients Without Assigned Template

Reason for Notification: Specified Email Address

Following Clients have been tagged as e-billed. They do not have an assigned template in the E-Billing module

Client #	Client	Third Party Biller
083580	██████████ INC.	T3
216396	██████████ INC. - LICENSING	DC
213112	██████████	DC
213603	██████████ PHARMACEUTICALS	DC
214387	██████████	LP

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

New E-Billing Matters

Reason for Notification: Specified Email Address

The following matters are electronically invoiced. To submit an invoice, a client generated matter number is required. This email is meant to be a verification of the client internal matter number. Please take a moment to verify this is correct. If the field is blank, please obtain a number at your earliest convenience.

Matter #	Client	Date Open	Client's Matter #	Billing Entity
442200-10286	DISPUTE	INCORPORATED re: NEW JF 08/11/2010	20100202	DATA CERT

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

New Matters Without LEDES numbers

Reason for Notification: Specified Email Address

The following matters are electronically invoiced. To submit an invoice, a client generated matter number is required. We do not have a number for these matters and consequently, we will not be able to bill them.

Matter #	Client	MA	RA	Date Open	Billing Entity
056719-10290	[REDACTED] IANCE, INC. re: [REDACTED] PARTNERS GP	CLARE	CLARE	02/05/2010	LEGAL PRECISION
056719-10289	LOCAL 800 PRIVATE FINANCE, INC. re: [REDACTED]	SEVERIN	SEVERIN	10/09/2009	LEGAL PRECISION
202970-10303	[REDACTED] - OFFICE OF GENERAL COUNSEL re: [REDACTED] AL.	MURPHY	JURICH	07/13/2010	LEGAL PRECISION
211958-10030	[REDACTED] FINANCE LLC re: [REDACTED]	SEVERIN	SEVERIN	06/22/2010	LEGAL PRECISION

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

New Timekeepers on [Client Name]

Reason for Notification: Specified Email Address

The following timekeepers are new to working on [Client Name] matters. They should be informed of the unique policies and procedures for this client. They will also need to be added to the [Client Name] E-billing system.

PID	Last Name	Title	Location Code	Department
00370	ROSS	PARTNER	31	010
10304	SALWEN	ASSOCIATE	31	010
11426	ZANZIG	ASSOCIATE	41	030

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Electronic Invoices Recently Issued.

Reason for Notification: Specified Email Address

Following Invoices were issued that require submission electronically to third party biller.

Matter #	Client/Matter	Invoice Date/Invoice	Inv Amt/LEDES #	Third Party Biller
213110-10007	[REDACTED], LITIGATION GROUP	08/13/2010	2,370.40	BRIDGEWAY CORRIDOR
	[REDACTED] TRADEMARK LITIGATION	1409172	GOOGLE SERENGETI	ANDALMAN
213110-10011	[REDACTED], LITIGATION GROUP	08/13/2010	1,481.00	BRIDGEWAY CORRIDOR
	UNCLAIMED PROPERTY AUDIT	1409173	74234	ANDALMAN
213110-10013	[REDACTED], LITIGATION GROUP	08/13/2010	1,205.50	BRIDGEWAY CORRIDOR
	[REDACTED] V. [REDACTED]	1409174	65695	ANDALMAN
090426-10154	[REDACTED], INC. ADV. DIANE	08/13/2010	16,917.53	DATACERT
		1409169	LIT-1833	ANDALMAN
214427-10001	[REDACTED], LITIGATION GROUP	08/13/2010	7,897.50	TYMETRIX
	UNCLAIMED PROPERTY	1409176	PFT035918	ANDALMAN

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Paperless Proforma

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

New Proformas Available for Processing

Reason for Notification: Specified Email Address

Proformas for the current month are now available in your Paperless Proforma Inbox. See the following list for an itemization.

Quick Link to the Paperless Proforma Web Page: [Paperless Proforma](#)

Matter No	Client Matter	Matter Atty	Fees Disb	Total
000264-10010	[REDACTED]		962.50	
	PURCHASE OF [REDACTED] ROAD	THOMPSON	0.00	962.50
001870-00573	JOHN A. [REDACTED]		20,123.00	
		ARAR	284.04	20,407.04
001870-10002	JOHN A. [REDACTED]		4,660.00	
	[REDACTED] MATTERS	BIERMAN	0.00	4,660.00
009126-02517	RUSSELL [REDACTED]		350.00	
	ESTATE AND TAX PLANNING	LOEB	11.10	361.10
012794-10021	[REDACTED] PARTNERS INCORPORATED		20,070.00	
	[REDACTED]	CLARE	97.20	20,167.20
012794-10023	[REDACTED] PARTNERS INCORPORATED		18,210.00	
		NOONOO	0.00	18,210.00

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Forwarded Proformas

Reason for Notification: Specified Email Address

Proformas have been forwarded to your paperless proforma box for your review. Paperless proforma can be accessed via Loelink or by clicking on the link below.

Paperless Hyperlink: [Paperless](#)

Matter Number	Client	Matter	Transferred From
090426-10016	██████████ A, INC.	██████████-GIFT CARD SURVEY	FLORIN
090426-10019	██████████ INC.	GIFT CARD LITIGATION REVIEW ANALYSIS	FLORIN

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

You Have Elected to Defer Billing on These Proformas

Reason for Notification: Specified Email Address

You have elected to defer billing on the following paperless proformas. These proformas will be archived for future reference. The billing staff will not do any adjustments on them. All time and costs will be included in the next proformas.

If you deferred these proformas in error, please contact the billing staff.

Matter #	Client	Matter	Fees	Cost	Total
214705-10001	<input type="text"/> GORDON AND MARCIA	ESTATE AND TAX PLANNING	52.50	0.16	52.66

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Paperless Proformas Auto Archived

Reason for Notification: Specified Email Address

These paperless proformas were auto archived because they are no longer current. This proforma is no longer visible in the paperless proforma box. If you need to see this proforma, please change the status to current.

Proforma	Matter/MA	Client/Matter	Fees/Cost
1028814	204577-10010	[REDACTED] USA	3,933.00
	K.R. FLORIN	[REDACTED] FOUNDATION	38.61
1031197	211435-10001		260.00
	T LAWSON	REVIEW OF TAX PLANNING	0.00
1034173	210944-10001	[REDACTED]	862,536.00
	M WADDELL	[REDACTED]	34,481.72
1034175	210944-10003	[REDACTED] IE INC.	6,149.00
	M WADDELL	PROCTOR & GAMBLE	0.88
1028818	204577-10012	[REDACTED] SA	525.00
	K.R. FLORIN	[REDACTED] OF HOPE	1,660.87
1034174	210944-10002	[REDACTED] DCHE INC.	0.00
	M WADDELL	[REDACTED]	160.20

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Paperless Proformas - Submitted and Unprocessed

Following proformas are in your inbox, but have not been processed. Please process and/or archive at your earliest convenience. Quick link to paperless is: [Paperless](#)

Matter No.	Client and Matter	Matter Atty	Billor Comments
201257-10024	CONSULTING GROUP, L.L.C. J.S.A.	FLORIN	
202049-10001	GROUP PROMOTIONS	FLORIN	
213506-10004	ITURES, LLC INC./ DEMAND LETTER	FLORIN	
213648-10001	D GROUP, INC. REGULATORY MATTER	FLORIN	

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Paperless Proformas with Discounted Matters

Reason for Notification: Specified Email Address

Client Name	Matter	Matter Description	Proforma	Matter Billing Atty	Discount
RES, LLC	213506-10004	.NC./ DEMAND LETTER	1029197	FLORIN	15.00
ADVANCED MEDIA, L.P.	205850-10001	PROMOTIONS	1028873	FLORIN	10.00
CABLE COMMUNICATIONS LLC	207716-10090	DEVELOPMENT OF TEMPLATE	1028975	FLORIN	5.00
FINANCING SERVICES LLC	200799-10002	PORTFOLIO ADMINISTRATION	1029454	NOONOO	5.00
THE MINT	029222-10009	2006 APPEAL (MALICIOUS PROSECUTION)	1028488	CLARE	5.00
INTERNATIONAL CORPORATION	104790-00010	GENERAL	1028521	CLARE	5.00
.COM	211300-10011	PROMO CODE PROMOTION	1021647	FLORIN	10.00
	210944-10002		1034180	WADDELL	10.00

Engagement Letter Compliance

Engagement Letter Compliance

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

No Engagement Letter Received. Client Will be Closed in Four Days

Reason for Notification: Specified Email Address

Please note that we have not received a signed engagement letter for the client(s) noted below.

As you know, it is firm policy that a signed engagement letter must be received within two weeks from the date the client is opened or THE CLIENT WILL BE CLOSED. If there are extenuating circumstances, please contact Donald Feltham.

Client Number	Client	Originating Attorney	Date Opened
216484	FOOD CO., LTD.	NUSSBAUM	08/05/2010
216485	U.S.A.	BECK	08/05/2010
216488	MEDIA GMBH	JOHNSON	08/05/2010
216483	DEDE	EMANUEL	08/05/2010

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Engagement Letter Compliance

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

No Engagement Letter Received. Client Will be Closed Today

Reason for Notification: Specified Email Address

Please note that we have not received a signed engagement letter for the client(s) noted below.

As you know, it is firm policy that a signed engagement letter must be received within two weeks from the date the client is opened or THE CLIENT WILL BE CLOSED. If there are extenuating circumstances, please contact Donald Feltham.

Client Number	Client	Originating Attorney	Date Opened
216379		SALTZMAN	07/02/2010

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Engagement Letter Compliance

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Clients Granted Temporary Reprieve

Reason for Notification: Specified Email Address

Please note that we have not received a signed engagement letter for the client(s) noted below.

These clients have been granted a temporary reprieve.

As you know, it is firm policy that a signed engagement letter must be received within two weeks from the date the client is opened or THE CLIENT WILL BE CLOSED. If there are extenuating circumstances, please contact Greer Rice.

Client Number	Client	Date Open	Reprieve to Expire	Originating Attorney
060507	ESTATE OF [REDACTED]	09/01/1996	12/30/2009	LEVINE
214483	[REDACTED] TOYS ENTERPRISES LLC	08/11/2009	12/15/2009	GRACE
214673	[REDACTED] VE SHAY	09/30/2009	10/26/2009	MEYERSON
214815	[REDACTED]	11/04/2009	12/16/2009	FRANKENHEIMER
214825	[REDACTED] RS, LLC	11/09/2009	12/15/2009	MALLOW
214861	[REDACTED] HARD KLEIN	11/17/2009	12/23/2009	LOEB
214960	[REDACTED] PARKS	12/14/2009	01/06/2010	WHITE
215011	[REDACTED] RECORDS	12/28/2009	01/26/2010	FRANKENHEIMER

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Engagement Letter Compliance

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Clients with Temporary Reprieves Expiring Today - Client Will be Closed

Reason for Notification: Specified Email Address

Please note that we have not received a signed engagement letter for the client(s) noted below. Client will be closed today.

Your Temporary Reprieve is About to Expire.

As you know, it is firm policy that a signed engagement letter must be received within two weeks from the date the client is opened or THE CLIENT WILL BE CLOSED. If there are extenuating circumstances, please contact Donald Feltham.

Client Number	Client	Date Open	Reprieve to Expire	Originating Attorney
215488	[REDACTED], DAVID	02/11/2010	04/12/2010	FRIMMER
215323	PHILLIP M. AND LYNDIA	02/11/2010	04/12/2010	FRIMMER
215263	[REDACTED] EDDIE F.	02/11/2010	04/12/2010	FRIMMER

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Other Uses

Event to Centralize E-Mailed Bills

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Invoice to be Emailed

Reason for Notification: Specified Email Address

These invoices need to be emailed to the listed addresses. Invoices should be from the Loeb Legal Invoices mailbox. Do not mail any invoices that are credit balances. Do not email [\[redacted\]](#) or [\[redacted\]](#) invoices.

Matter	Client/Matter	Invoice	Amount	Task/Email
205125-00401	[redacted] COLLEGIATE [redacted] CIRCLE CITY DRIBBLE (US) CL. 41	1409006	719.20	EMAIL ALL IN ONE PDF FILE [redacted]hicks@n-[redacted]
212745-10002	[redacted] TRUST	1408905	1,472.50	INVOICES E-MAILED [redacted]@loeb.com
214401-01111	[redacted] WILSON [redacted] INC. AUDIT LETTER	1408875	1,105.00	INVOICES E-MAILED [redacted]lendon@kenned[redacted]son.com

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Counting Timekeepers

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Current Count of Active Timekeepers

Reason for Notification: Specified Email Address

Number of Active Timekeepers
413

If you have any questions about this data, please contact Scott Wirtz @ ex7130.

Extend Pulling from Non-Elite Databases

WELCOME TO EDWIN MAIL BOT

The following reports have been generated based on events occurring in the billing system. Additional detail on these events can be found in [Webview](#)

Pending Time

Reason for Notification: Specified Email Address

The following time entries are being held in pending numbers on the DTE system. In order for time to be counted, it needs to be transferred to a valid number and released. If the matter will not be opened, please transfer to a valid number or delete the time.

You or your secretary should do this in DTE.

This notice only includes time entries since 01/01/2007. If you need to see prior entries, a report can be run in DTE.

Client	Matter	Client/Matter Description
Work Date	Hours	Time Narrative
\$466	\$1	David [REDACTED]
01/10/2007	1.00	CONFERENCE WITH [REDACTED]
210245	\$1	ESTATE OF [REDACTED] e: 10001
01/11/2007	0.20	TELEPHONE CONFERENCE WITH [REDACTED] RE FROZEN ACCOUNT AND INVESTMENT CHANGE
\$9	\$1	[REDACTED] re: NEW CLIENT
01/11/2007	0.30	MEETING WITH [REDACTED]

Sample Code to Retrieve Data from Other Databases

- SELECT a.timekeeper, a.name, b.client, b.matter, d.name, c.name, b.workdate, b.narrative, b.hours FROM [sc-sql].dtesql.dbo.timekeepers a INNER JOIN [sc-sql].dtesql.dbo.dtetime b ON a.timekeeper = b.timekeeper **INNER JOIN [sc-sql].dtesql.dbo.persmatters** c ON a.timekeeper = c.timekeeper AND b.matter = c.matter AND b.client = c.client INNER JOIN [sc-sql].dtesql.dbo.persclients d ON b.timekeeper = d.timekeeper AND c.client = d.client AND b.client = d.client WHERE (((b.matter) Like '\$%') AND ((b.workdate)>'01/01/2007')) OR (((b.client) Like '000000') AND ((b.workdate)>'01/01/2007'))

SQL Code to Run Additional Events

- `update extschstat set etgennow='Y', etmailnow='Y' where eteindex in (235,236)`
- `select tkinit from timekeep where 1=0`