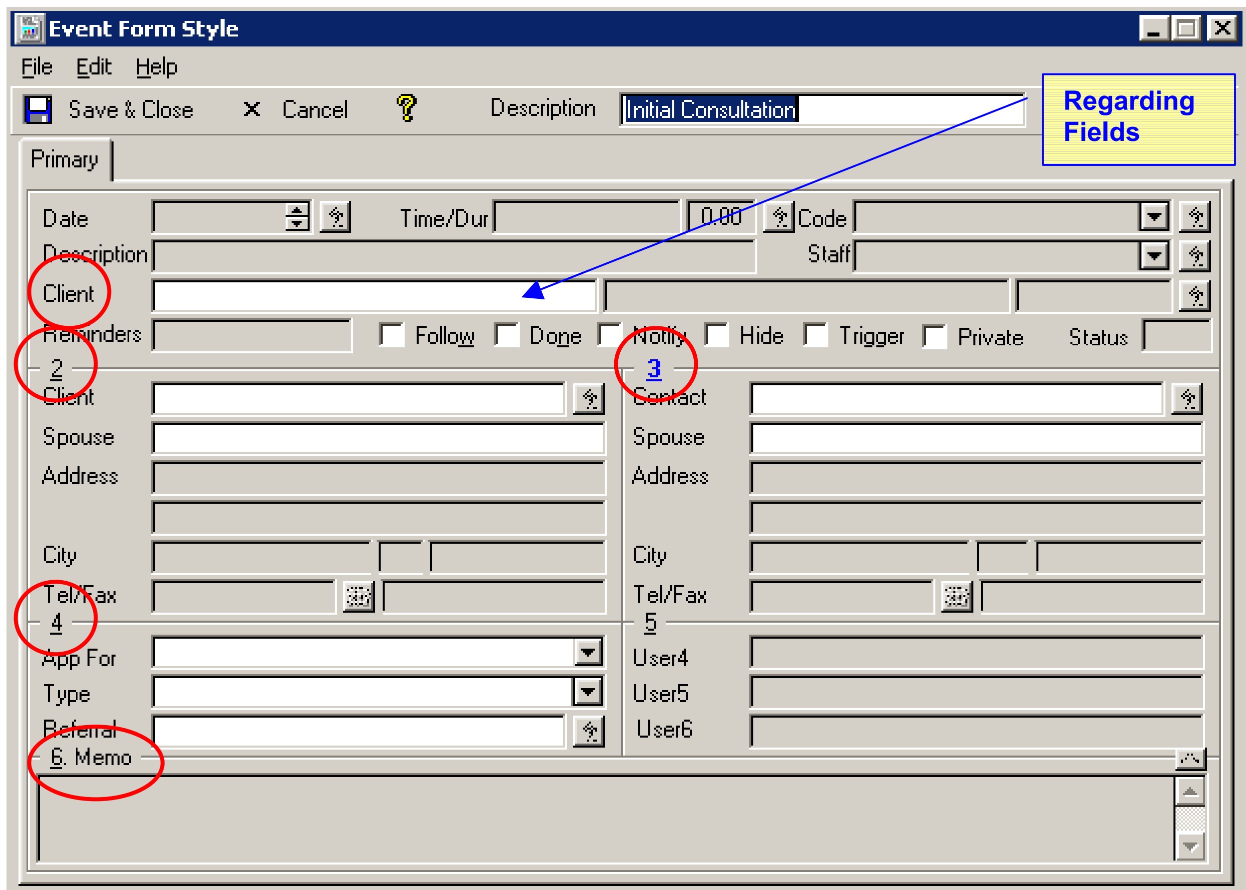
Event form for scheduling an initial consultation with a new Client. The information gathered is used with HotDocs to generate a confirmation letter and questionnaire.



1. There is an autoentry that enters the description [Initial Consultation] and a notation in the Memo [Initial consultation and set-up new client file]. The Memo field is used in billing to describe the charge made to the Client for the consultation.
2. The duration is set depending upon the type of consultation. 1.5 hours is the default and is inserted as part of the autoentry.
3. The Client is the person or persons the consultation is about. If the Client is the person making the appointment, then only area 2 is completed [by adding a new contact]. If a child or other person makes the appointment on behalf of the Client, then area 3 is also completed [by linking to or adding a new contact]. The client under area 2 is Coded as Client, the Contact under area 3 is coded under a generic Code that includes Family, Friend, or other.

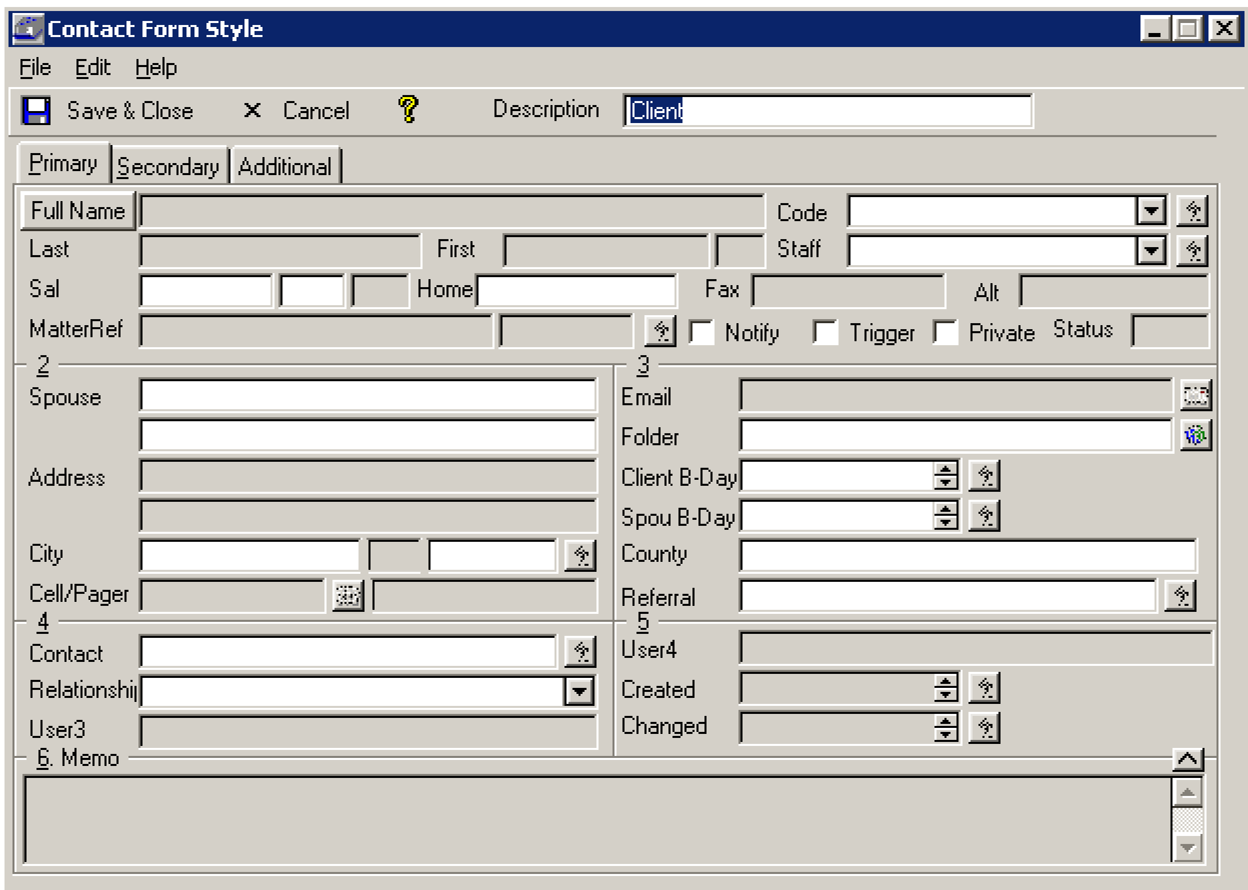
   The Client and Contact form styles have been changed from the default. [SEE CLIENT FORM BELOW] The firm field is the spouse's name. I enter the well spouse as the Contact and the ill spouse as spouse.

4. Area 4 is used to clarify the relationship of the Contact listed in area 3 and the Client listed in area 2.
5. The Client field within the REGARDING FIELDS is used to indicate who is billed for the appointment. The bill to field on the billing form pulls information from this field. It also is used when a documents is auto named. The Client field in the regarding fields is always set to show Last Name First Name. The document auto naming uses that to set up a client directory that uses the client's last name first.
6. When the event is saved and closed, you have::
   a. Scheduled the Event
   b. Set up a new contact for the Client
   c. May have set up a new contact for the Contact.
7. Saving the Event triggers an Add Document which has an autoentry. It opens with the Code, Description, the Client field in the Regarding Fields, the file name and the Generate and HotDocs buttons pressed.

   The file autonames to DEFAULT DIRECTORY\CLIENTS\CLIENT LAST NAME FIRST NAME\MATTER NUMBER\YEAR MONTY DATE_DESCRIPTION. An example directory and file name for this letter would be
   :
   Z:\clients\Smith, John\20030107_Initial Consultation Letter.doc.

   No Matter Number is inserted because there is none. The HotDocs template to generate a confirmation letter and questionnaire is selected.
8. The HotDocs template does the following:
   a. Addresses the letter to either the Client or the Contact, pulling information out of Time Matters.
   b. Fills in a confirmation letter depending on the type of consultation selected. Includes directions for filling out the questionnaire, directions to the office, the initial consultation fee, and date and time of the appointment (also pulled from Time Matters).
   c. Attaches a questionnaire based on the type of consultation. Completes the Client's name and address.
   d. Inserts the Firm's letterhead.
9. A macro in Word prints out the letter, questionnaire and envelope or label.
10. Total time to enter the appointment, print the documents and stuff the envelope is less than 5 minutes.

CLIENT FORM



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