

# Abacus Practice Management “Getting Started”

Prepared by AbacusLaw Customer Care

# Testing your Abacus Skills

## “Creating a Custom Screen”

In this exercise you will apply your **Creating Custom Screen** skills taught in the AbacusLaw “Getting Started” Training to create a **Names** screen similar to the picture below. Complete this by adding 2 new fields to the database, add those fields to a custom screen, and reorganize the current fields on the screen to match the picture.

Name: Smith, John

< > SMITH, JOHN ?

1 NEW ONE | 2 Notes | 3 Linked Matters | 4 Linked Events | 5 Linked Docs | 6 Emails | 7 Linked Names

Last name	Smith	Active	<input checked="" type="checkbox"/>
First name	John	Referred By	
ID number	11	DI	
Dear	Mr. Smith	SSN#	- -
Label	John Smith	Contact Numbers	
		Dayphone	(555)555-5555
		Evephone	( ) -
		Fax	( ) -
		Cell	( ) -
Zip	92108	Class	CLIENT
City	San Diego	Atty	AK
St.	CA	Open	07/01/09
Email	JohnSmith@training.com		

Add Clone Delete Query Index LAST\_FIRST

# Skills Recap

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## Adding fields to Database

1. **Navigate** to File/Setup/Database Structures
2. **Click** Add button
3. **Create** S.S.N & Driver License Field
4. **Click** Execute changes and create new database

## Screen Designer

1. **Navigate** to File/Setup/User Preferences
2. **Click** on the Appearances Tab
3. **Click** names button
4. **Locate** the Original Screen
5. **Click** Clone
6. **Enter** in a screen ID.

## Quick tips in Screen Designer

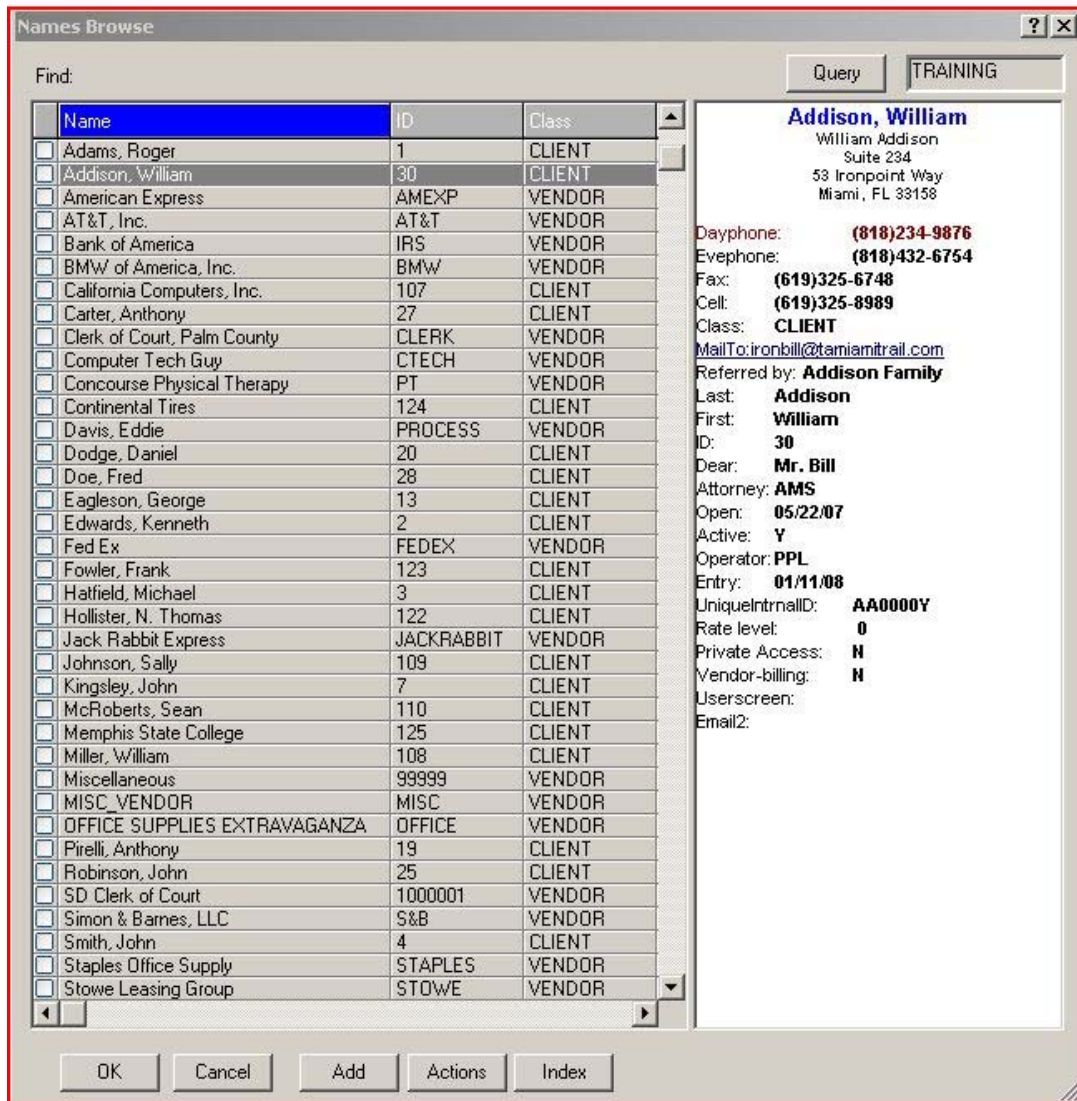
1. Many options are accessed by **right-clicking** in un-used grey area
  - a. Add Box will add a Border Box that is resizable
  - b. Add field will prompt you with fields to add
2. Fields can be resized and moved
3. Multiple fields can be **selected** by drawing a box and moving at once
4. Name screen can be enlarged by right-clicking and selecting

Note: Remember to press the F1 key to access the Help document if you get stuck

# Testing your Abacus Skills

## “Creating a Custom Query”

In this exercise you will apply your **Creating Custom Query** skills taught in the AbacusLaw “Getting Started” Training to create a 3 line name **Query** utilizing the **Query Manager**, which will retrieve all active Names with the class code of client or the class code of vendor.



The screenshot shows the 'Names Browse' window with a list of names and their details. The 'Addison, William' entry is selected, and its details are displayed on the right side of the window.

Name	ID	Class
<input type="checkbox"/> Adams, Roger	1	CLIENT
<input type="checkbox"/> Addison, William	30	CLIENT
<input type="checkbox"/> American Express	AMEXP	VENDOR
<input type="checkbox"/> AT&T, Inc.	AT&T	VENDOR
<input type="checkbox"/> Bank of America	IRS	VENDOR
<input type="checkbox"/> BMW of America, Inc.	BMW	VENDOR
<input type="checkbox"/> California Computers, Inc.	107	CLIENT
<input type="checkbox"/> Carter, Anthony	27	CLIENT
<input type="checkbox"/> Clerk of Court, Palm County	CLERK	VENDOR
<input type="checkbox"/> Computer Tech Guy	CTECH	VENDOR
<input type="checkbox"/> Concourse Physical Therapy	PT	VENDOR
<input type="checkbox"/> Continental Tires	124	CLIENT
<input type="checkbox"/> Davis, Eddie	PROCESS	VENDOR
<input type="checkbox"/> Dodge, Daniel	20	CLIENT
<input type="checkbox"/> Doe, Fred	28	CLIENT
<input type="checkbox"/> Eagleson, George	13	CLIENT
<input type="checkbox"/> Edwards, Kenneth	2	CLIENT
<input type="checkbox"/> Fed Ex	FEDEX	VENDOR
<input type="checkbox"/> Fowler, Frank	123	CLIENT
<input type="checkbox"/> Hatfield, Michael	3	CLIENT
<input type="checkbox"/> Hollister, N. Thomas	122	CLIENT
<input type="checkbox"/> Jack Rabbit Express	JACKRABBIT	VENDOR
<input type="checkbox"/> Johnson, Sally	109	CLIENT
<input type="checkbox"/> Kingsley, John	7	CLIENT
<input type="checkbox"/> McRoberts, Sean	110	CLIENT
<input type="checkbox"/> Memphis State College	125	CLIENT
<input type="checkbox"/> Miller, William	108	CLIENT
<input type="checkbox"/> Miscellaneous	99999	VENDOR
<input type="checkbox"/> MISC_VENDOR	MISC	VENDOR
<input type="checkbox"/> OFFICE SUPPLIES EXTRAVAGANZA	OFFICE	VENDOR
<input type="checkbox"/> Pirelli, Anthony	19	CLIENT
<input type="checkbox"/> Robinson, John	25	CLIENT
<input type="checkbox"/> SD Clerk of Court	1000001	VENDOR
<input type="checkbox"/> Simon & Barnes, LLC	S&B	VENDOR
<input type="checkbox"/> Smith, John	4	CLIENT
<input type="checkbox"/> Staples Office Supply	STAPLES	VENDOR
<input type="checkbox"/> Stowe Leasing Group	STOWE	VENDOR

**Addison, William**  
William Addison  
Suite 234  
53 Ironpoint Way  
Miami, FL 33158

Dayphone: (818)234-9876  
Evephone: (818)432-6754  
Fax: (619)325-6748  
Cell: (619)325-8989  
Class: CLIENT  
MailTo: ironbill@tamiamitrail.com  
Referred by: Addison Family  
Last: Addison  
First: William  
ID: 30  
Dear: Mr. Bill  
Attorney: AMS  
Open: 05/22/07  
Active: Y  
Operator: PPL  
Entry: 01/11/08  
UniqueIntrnalID: AA0000Y  
Rate level: 0  
Private Access: N  
Vendor-billing: N  
Userscreen:  
Email2:

# Skills Recap

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## Accessing Query Manager

1. **Navigate to** Names browse by **clicking** Names/browse
2. **Click** the Query Button located at the top right
3. **Select** Query Manager

## Creating a NEW Query

1. **Navigate** to Query Manager **click** the ADD button
2. **Enter** in a query ID and Description
3. **Click** the Add button to add a query line

## Quick Tips in Query Manager

1. Remember to select And/OR depending on how the line reads
2. Carefully read the line as a sentence and see if it makes sense.

Note: Remember to press the F1 key to access the Help document if you get stuck

# Testing your Abacus Skills

## “Creating a Form Doc Letter”

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In this exercise you will apply your **Creating Custom Forms** skills taught in the AbacusLaw “Getting Started” Training to create a Form Doc Letter similar to the picture below. Complete this by adding several fields throughout the letter making sure they compare with the fields that are filled out in AbacusLaw to match the picture below.

## Sample Letter

Recipient:  
«Client\_Address»

Dear: «Client\_Dear»

This is a sampler letter for «Client\_Label1» regarding the «File\_Matter» matter. If done properly every field on here should merge with the data you have entered in abacus.

Sincerely,  
«Abacus\_User»  
«MyFirm\_Address»

# Skills Recap

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## To Open up Form Generation

1. **Open** a specific matter/name screen
2. **Click** the print icon located in the Quick Toolbar
3. **Select** Form generation
4. **Click** on Create MS/Word Perfect Form

## Quick Tips using Form Generation

1. Since this is a letter that requires Matter and Name information, remember to have a name linked to the matter with the specific link type.
2. Make sure to set up your "My Firm"; File/Setup/My Firm