FIELD GUIDE · FOR FIRM USERS

Trial Commander Field Guide

Everything a Florida firm needs to go from a fresh account to a running practice — matters, deadlines, billing, trust, and the AI tools — in the order you'll actually do it.

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Part I · Your first ten minutes

One person at your firm creates the account and becomes the firm administrator. Everyone else is invited afterward.

ROLE	WHAT IT MEANS
Firm Admin	Sees every matter, finalizes invoices, moves trust money and manages the firm (users, settings, billing). At least one person must hold it.
Attorney	Sees every matter, opens new matters, signs off conflict checks, finalizes invoices and moves trust money; can't manage the firm (users, settings, billing).
Associate	Sees only the matters they're assigned to, adds deadlines and tasks, logs their own time and drafts invoices; can't open new matters or finalize invoices.
Paralegal	Sees only the matters they're assigned to, logs their own time and records trust deposits; can't add deadlines or tasks, open new matters or finalize invoices.
Read Only	Sees only the matters they're assigned to and the contact list; can't change anything. Good for of-counsel or auditors.

These are the same lines the invite form shows under each role, and they are what each role *starts* with. The invite form opens on — **choose a role** — rather than on Attorney, so nobody is given a role by accident, and it asks for the person's full name so they never show up as an email address.

> **NEW — INDIVIDUAL PERMISSIONS**
> Roles are the starting point, not the ceiling. A firm administrator can switch on specific abilities for one person without changing their role — so a senior paralegal who runs intake can be given **Create contacts** and **Create new matters**, and one who dockets can be given **Edit matter details**, while the rest of the role stays as it is. The switches are at Settings → **Team Members** → the person's **Profile & access** → **Additional permissions**. If the app tells you that you cannot create something, that is the reason: ask your administrator rather than assuming it is broken.

Getting in

1. At `trialcommander.com` press **Start Free Trial** (top of every page) or **Start 30-day free trial**; if you are already on the sign-in page, **Sign up** is the link beneath the form. Use your work email — you'll verify it with a one-time code. No card is asked for, and signing up accepts the Terms, the Privacy Policy and the AI Disclosure.
2. **Set up your firm.** The form asks for the **Firm Name**, the **Principal Attorney Florida Bar Number** and a **Firm Email** (all three required), and optionally the firm's phone and address. This creates your firm workspace; every matter, contact and invoice lives inside it, invisible to any other firm.
3. **What do you practice?** Tick the practice areas you want in your sidebar. It narrows what the sidebar shows, not what you can do, and a firm administrator can change it later under Settings → Display. The sidebar also follows the matters each person works on, so leaving every box empty does not show every area — Part IV explains what the list holds.
4. Read the End User License Agreement, tick the box to accept it, and press **Create Firm & Start Trial**.
5. **Connect your AI** — one optional screen, skippable in one click. It has a tab each for **Claude**, **ChatGPT** and **Gemini**, with the connector address and three or four plain steps, and a **Microsoft Copilot** tab that says it is not available yet; for administrators it is also the place to add the firm's own Anthropic key. **Skip for now** → or **Continue to my dashboard** moves on, and it waits for you: see the callout below.
6. The dashboard's **Welcome** card (**Get started**) asks three optional questions — how long you have been practising, what you used before, and what you would like to learn first. **Save & open dashboard**, or **Skip — I'll explore on my own**. Your next steps come from the Getting started card below, not from these answers.
7. **Invite your team** from Settings → **Team Members**. Assign each person a role — roles decide what they can see and do.

Signing in afterwards. Use **Sign in** at the top of trialcommander.com, or go straight to `app.trialcommander.com/sign-in`. A link to a page inside the app — a notification, a matter someone sent you — asks you to sign in first and then takes you to that page, not to the dashboard.

> **TWO-STEP VERIFICATION FOR ADMINS AND ATTORNEYS**
> Nobody is asked for a second sign-in step during a free trial. Once the firm is on a paid plan past its free days, once its trial has ended without a plan, or if it was created directly on the free Starter plan, every Firm Admin and Attorney is stopped at **Two-factor authentication required** until they enrol: click your avatar on that page, choose *Manage account* → *Security* → *Add two-step verification* (an authenticator app, for example), then press **I've enabled MFA** →. A firm administrator can require it of everyone under Settings → **Security** → **Require firm-wide**.

If you were invited

1. Open the link in the invitation — or the one your administrator sent you directly (see the callout below). The page says **You've been invited** and names the firm.
2. Press **Create Account & Accept**, or **Already have an account? Sign in** →. Use exactly the email address the invitation was sent to: an account under any other address is refused.
3. Read the End User License Agreement, tick the box, and press **Accept & Join**. You join the firm in the role on the invitation.

An invitation lasts seven days and works once. A used or expired link shows **Invitation not found or expired** — ask your administrator to send a new one. If the firm has no free seat, the page says so: a firm administrator has to upgrade the plan or free a seat first.

Your own profile

Settings → **Profile** is yours alone. **Name and contact details** is how you appear to the rest of the firm — team lists, matter teams, the Firm Directory, time entries: **Full name** (required), **Position at firm**, **Direct phone**, **Cell phone**, **Bar number** and **Mailing address**, saved with **Save profile**. Until a name is there, every screen shows your email address instead; the email address itself is not changed here. **Preferred AI model** picks your own model for the AI features — the firm default applies until you choose, and a model the firm has set for one particular feature still wins. **Timezone** is your clock: it decides when a deadline counts as overdue for you, the zone a hearing you enter is recorded in, the hour your daily digest arrives and where Chronicle's day ends.

Federal Court Admissions records the federal courts you are admitted to. Choose the **Court** and enter the **Admission date** (both required), and if you like the **Bar / admission number** and **Notes**, then press **Add admission**; **Remove** takes one off. A bankruptcy matter will not accept a lead attorney who is not admitted to the chosen district.

Starting on Starter instead of a trial

A solo attorney can skip the trial and start on the free **Starter** plan. On the pricing page press **Start free on Starter** and sign up — the form says *no card, no trial clock*. The firm form then opens with a **Starting on Starter** panel; fill it in the same way and press **Create Firm on Starter**. Starter is one user, up to

fifteen matters open at a time and thirty opened in any twelve months (closed ones still count toward the thirty), filed under Personal Injury, First-Party Property Insurance, Family Law, Criminal Defense, General Litigation or Other. It includes basic invoicing, OneDrive sync, the Word and Outlook add-ins, the read-only connector, and $3 a month of managed AI for the whole firm — or the firm's own AI key; anything else shows **Upgrade to unlock**, and the dashboard carries a **Starter · free plan** card. Every paid plan starts with 30 days free. A firm created directly on Starter is not in a trial, so its administrator is asked to set up two-step verification at the first sign-in (the callout above).

THE APP NOW WALKS YOU THROUGH THE FIRST WEEK

A **Getting started** card sits at the top of the dashboard: a progress bar, how many steps are done, and *one* next step with a sentence saying why it matters and a **Take me there** → button that goes straight to the page it happens on. **Getting Started** in the sidebar, under Home → **More**, is the whole list — the first-week checklist in Part XIV for everyone, plus a firm-setup track for administrators. Steps tick themselves off the firm's own data, so nobody has to come back and record something they already did. **Dismiss** hides the card for you alone, and it goes away on its own once everything is done.

BRING THE AI YOU ALREADY USE

On a trial or the free plan, the **Getting started** card on the dashboard has one more step, **Connect your AI**, until you are done with it. It has one row for you — *connect your own Claude, ChatGPT or Gemini to your matters* — and, for administrators, an optional row for the firm's own Anthropic key. **Set it up** → opens the full page (also at Settings → **Connect your AI**): pick your assistant's tab, press **Copy** beside the connector address, follow the steps, and click **Approve** when Trial Commander asks. Back on the page, **Test connection** shows *Connected ✓ on* the date you approved it. Each person connects their own; it sees only the matters you can see and runs on your own assistant's plan, never the firm's AI allowance. The step goes away by itself when your row is ticked; **I'm all set** or **Skip** hides it sooner, for you alone, and the page can put it back. What a connection shares, and with whom, is § 4.1 of the Privacy Policy.

IF AN INVITATION NEVER ARRIVES

Law-firm mail filters routinely quarantine a first message from an unfamiliar sender, and the recipient never sees it. After sending an invitation your administrator is shown a link they can send you directly over Teams, Slack, or a text — it works whether or not the email arrives. Ask for it rather than waiting.

PRACTICE TIP

Unless you started on Starter, your 30-day trial starts at sign-up and includes the full system. Pick a plan under Settings → Subscription & Billing whenever you're ready. If you haven't by day 30, nothing is deleted: the firm continues on the free **Starter** plan — one seat, fifteen active matters (thirty opened in any twelve months), six filing areas, basic invoicing, the client portal in English and Spanish, OneDrive sync, the Word and Outlook add-ins, $3 a month of included AI for the whole firm or your own AI key, and the read-only connector — and any other staff are paused, not removed, until the firm picks a plan. Portal clients and outside collaborators are not seats and are never paused. Before then, a firm administrator can choose who keeps the one sign-in: Settings → Team Members → **Who keeps the sign-in on the free Starter plan** (the firm's first administrator unless you pick someone else; **Or keep everyone — see plans** goes to billing). On Starter itself, handing the sign-in to someone else pauses your own account the moment you save.

The line across the top. During the trial a slim banner at the top of every page counts the days left — *12 days left in your free trial.* — with **Choose a plan**; it turns amber in the last three days and once the trial has ended. After a plan is chosen, it counts the free days left before the plan's first charge and offers **Billing** instead. On Starter there is no banner. If a subscription payment fails, it reads *We couldn't process your last payment. Update your billing to keep full access.* with **Update billing**.

ON STARTER, THE SPECIALIST TOOLS ARE THE UPGRADE

A matter filed under Family Law or Criminal Defense on Starter is a full matter file, but that area's own tools — and a practice area's hub — show an **Upgrade to unlock** panel instead: *"Your plan covers the matter file itself — its contacts, calendar, time and documents."* and *"Nothing on this matter is locked or lost."* Its **Upgrade to unlock** button opens billing; the other goes back to the matter.

ON A PAID PLAN, YOUR SEAT'S PRACTICE AREA

On Bronze, Silver, Gold and Platinum every seat includes one practice area, chosen by your firm administrator, and civil litigation. Another area's specialist tools show **Not on your seat**, with the reason and what your administrator can change. The matter itself never locks: a matter you can open stays open, with its deadlines, documents, time and billing. Until your administrator chooses your area, you keep the tools of every area.

Part II · Before the consultation: the conflict check

The conflict check comes **first** — before the consultation, before the contact record, before the matter. Once the firm consults with a prospective client, Rule 4-1.18 duties attach whether or not the engagement follows, so the check is signed before anyone sits down with them.

1. **Run the check.** Compliance → **Conflict Checks** → **New Conflict Check**, or **+ New** → More → **Conflict check**; a contact's page has **Run conflict check**, a lead's page **Run the conflict check** →, and New Client Intake offers it at question seven. Type the prospective client and every adverse and related party you know of. It searches matter names, parties, opposing counsel and case numbers; contacts by name, email and phone; document file names and notes (not the text inside documents); every party row and every contact linked to a matter; and it flags an opposing counsel who keeps coming back. Earlier conflict checks are not searched. Running a check needs **Create new matters** — Firm Admins and Attorneys hold it, and an administrator can switch it on for anyone else.
2. **If you cannot sign, hand it on.** Saving a check you cannot sign tells everyone who can that it is waiting; it sits under **Awaiting attorney** on the Conflict Checks page until one of them signs. You can see where each check stands, but reading the hits is part of deciding them, so it takes sign-off.
3. **An attorney decides and signs.** Whoever holds **Sign and clear conflict checks** — attorneys and firm admins by role, anyone else an administrator names — opens the check and decides each hit: *Not a conflict*, *Conflict — waivable* or *Conflict — not waivable*, with a note, then **Decide**; the page counts *N of M reviewed*. Then **Choose resolution** → **Save resolution** (with a written waiver when the conflict is waivable), and **Attorney Sign-Off** → **Sign & close**. Anything still in the way is listed under **Before signing**, and a resolution that differs from what the decisions add up to needs an override reason. Deciding and signing also need **Edit matter details**. Signing marks the contact *Cleared* with the date. Clearing a conflict is a lawyer's judgment; preparing the intake never was. Only a signed check clears the person.
4. **Save as potential client.** On the check, **Save as potential client** makes the person a potential-client contact in one click (it needs **Create contacts**) — the same person the lead and, later, the matter will be. No duplicate records. **Start the matter** opens the new-matter form with this check already chosen, and **Link to Matter** → *Pick the matter this check supported* → **Link** attaches it to a matter that is already open (Edit matter details). One check supports one matter, and a check resolved *Non-waivable — refusing the matter* never becomes a contact or a matter.
5. **Then schedule the consultation.** Booking one on a lead whose check is not yet signed still goes through, but you are warned on the spot and the lead page shows the exception until the check is signed.

When the phone rings: New Client Intake and the Lead Pipeline

New Client Intake in the sidebar is the front desk's script for a new caller — seven questions. Type the caller's name and press **Start — the rest saves as you go**: question one shows *Matched* when they are already a contact and *New to us* when they are not, and every answer after that saves by itself, so a dropped call waits under **Unfinished — pick up where the call stopped**. Question seven is a real next step, not a note about one: run the conflict check, book a consultation, hand it to an attorney or staff member (**Send for review**), or refer them elsewhere — each offered only to someone permitted to do it.

Nothing on this screen opens a matter; the matter opens from the cleared check. Finished calls are listed under **Finished today and lately**. The page needs **Edit matter details**, and is part of the trial and every paid plan.

Every inquiry is also a lead. **Lead Pipeline** (sidebar, under Tools) follows each prospective client from first contact to signed matter. Inquiries from New Client Intake, the firm's public booking page and — where the firm has Office switched on — its website chat arrive on it tagged by where they came from; **Log a lead** → **Add to pipeline** adds a phone, walk-in or referral lead by hand (Edit matter details). On the free Starter plan both pages show **Upgrade to unlock**.

Booking the consultation

The contact's page now carries a **Consultations** card, so the time goes in the diary rather than on a sticky note. You can **Send booking link** — a private link to that person, showing the real open times on a bookable attorney's availability — or book the time yourself while they are still on the phone. The same link is what they later use to change or cancel, so a forgotten appointment becomes a cancellation instead of an empty hour.

How a stranger's click is treated is the firm's choice, set once by a firm administrator at **Settings** → **Scheduling**:

- **Front desk confirms each request** — the default. The click is a *request* that waits in **Consultations** in the sidebar until someone at the firm presses **Confirm** or **Decline**. Nothing lands on an attorney's calendar until a person says so.
- **Prospects book directly** — the time is booked then and there.

A booking made by staff is confirmed either way: the mode governs what a stranger may do, and the front desk is the firm. Everything that happens — link sent, requested, booked, confirmed, declined, rescheduled, canceled, no-show, reminder sent — lands on a **Scheduling timeline** on the contact. A confirmed consultation appears on the calendar as a **Consult** chip and is pushed to that attorney's connected Outlook or Google calendar; a cancellation takes it off again. Working the queue needs **Schedule consultations and work the booking queue**, which attorneys and firm admins hold by role and an administrator can grant to anyone.

Your own calendar, and the hearing button

Calendar now answers “what is on *my* day” as well as “what is on the firm’s”. **My calendar** shows the events that are yours — the ones that name you, plus everything on your matters that names nobody — and whoever holds **Schedule consultations and work the booking queue** can pull up a colleague’s the same way. That view can never show you more than the firm calendar already did: it is your own access, filtered to one person, so a matter you cannot open stays invisible and no client’s name reaches you through a calendar entry.

The **Firm** and **My matters** buttons are for administrators and attorneys; everyone else normally sees only the matters they are assigned to. **My calendar** is there for everyone, and the **Whose calendar** picker for

whoever holds the scheduling permission. A **Matter** filter narrows any view to one file.

Week and day are laid out in half-hour blocks, and clicking an empty block starts a hearing at that time. A matter's **Hearings** page does the same thing from the matter: a date, a time, who is covering it, and it is on the calendar. A hearing's time is recorded in the time zone of the person entering it — set on Settings → Profile, Eastern unless you change it — and the form says which, so 9:00 AM is 9:00 AM in March and in November.

Nothing on the calendar is dragged. In **day** view, a hearing you entered, a deposition, or a deadline somebody typed carries **Move to** (and **At**, for a hearing's time) → **Move**. You cannot move a date the product computed — a court-rule deadline, a limitations date, the trial date, a hearing copied from the e-portal, an appointment a client agreed to. Those say **Not moved here** and name the page that owns the date, because moving it on the calendar would change nothing except what the calendar claims. Every item also carries **Whose** → **Save**, which names the person it belongs to and puts it on their My calendar — a limitations date included. Moving and reassigning need **Edit matter details**; without it, the calendar shows no Move or Whose controls.

On the matter, Plan → **Hearings** → **Add a hearing** asks for the **Hearing date**, the **Time (24-hour)**, **What kind of setting**, **How long (minutes)**, **What is it on**, **Where**, **Before**, **Who is covering it** (or everyone on the matter), anyone else who **Also needs it on their calendar**, and **Notes**, then **Add to calendar**. Three lists follow. **Ours** holds the hearings the firm entered, each with **Move to** / **At** → **Move**, **Covered by** → **Save**, and **Cancelled**. **Cancelled** keeps the ones called off, each with **Put back**. **From the court's e-portal** is read-only and is not filled in from this page; on most matters it reads *Nothing from the e-portal on this matter*. Anyone on the matter can read the page; adding, moving, reassigning, cancelling and putting back need **Edit matter details**. On a federal criminal matter the page points to Federal Clocks (Part VII) for the one deadline a motion hearing drives, which it does not docket itself.

Your dates on your phone. Settings → **Calendar Sync** offers two ways. **Subscribe (no OAuth) — iCal feed** gives you a personal, read-only feed address in two forms, `webcal://` and `https://`, each with **Copy**; **How to add this in your calendar app** says where to paste it in Apple Calendar, Google Calendar and Outlook. It refreshes about hourly and needs no Google or Microsoft account — but anyone holding the address sees your dates, so keep it to yourself. Or connect a calendar account — **Microsoft 365 / Outlook** or **Google Calendar** — and the open deadlines on your matters are pushed to it as all-day events titled *DEADLINE:* or *REMINDER:*; adding, moving, completing or deleting a deadline updates the event by itself, and **Sync now** forces it. **Reconnect** renews the connection; **Disconnect** stops the push and leaves the events already pushed where they are. A firm administrator's **Push filter** — **Minimum priority to push** — keeps lower-priority deadlines off everyone's calendars, and a matter's **Calendar routing** card (Part VII) picks which of your calendars its dates go to. Nothing you change in Google or Outlook changes a deadline here; your calendar's own events show, read-only, on the Deadlines page.

> **WHAT THE PROSPECT IS TOLD, IN THE FIRM'S NAME**
> The booking page says that booking a consultation does not create an attorney–client relationship and that the page gives no legal advice; that they should not send confidential details or documents there; and that the form does not stop a legal deadline — call the firm if something must be filed or answered soon, and for an emergency call 911. The page is private to that person and is not indexed by search engines.

Every check the firm has ever run is on the **Conflict Checks** page with its state — cleared, hits pending, signed — and what each one became. Hits you are not permitted to read are still counted, so the page never understates a conflict to make itself readable. The same information sits on the dashboard as the **Conflict checks** widget if you want it in front of you every morning.

> **RULE NOTE · FLA. BAR**
> Rules 4-1.7 / 4-1.9 / 4-1.10 (conflicts, imputed firm-wide) and 4-1.18 (duties to a prospective client). Those numbers appear on the conflict screens, the written waiver and the signed report only when the firm's home state is Florida; any other firm sees the conflict-of-interest rules named without a rule number. A firm admin can require a signed check before any matter opens, and switch the consultation warning, at Settings → **Firm Policies**.

Bankruptcy: a three-business-day clock starts at the first offer

If the person you are about to speak to has bankruptcy business, one more thing happens before anything else. Under 11 U.S.C. § 527(a)(2) the firm is a *debt relief agency* and owes them the § 342(b) notice and the § 527 advisements **within three business days of first offering bankruptcy assistance** — and § 101(4A) counts information, advice and counsel as assistance, so the call you are taking may already have started it.

The contact's page carries a **Bankruptcy disclosures** card. Press **Send bankruptcy disclosures** to send them on a private link the client acknowledges by typing their name, or **Record paper delivery** if they were handed over in the office. Sending a bankruptcy intake sends them automatically, and the intake does not open until they are acknowledged. If the first offer was earlier than today — a call last week, a consultation booked on Friday — put that date in: the earliest date ever recorded wins, on every row on that contact, and sending again next week buys no extra days.

> **"SENT" IS NOT "DELIVERED"**
> The card goes **red** the day after the due date, and it quotes 11 U.S.C. § 526(c) when it does: a contract for bankruptcy assistance that misses the material requirements of §§ 526–528 is **void**, the firm cannot enforce it, and the fees are recoverable. After the date passes the record cannot be repaired. The firm-wide queue on **Practice** → **Bankruptcy** is where you find one before that happens.

Part III · Opening a matter, properly

Click **+ Create your first matter** on the dashboard (later: Matters → **+ New Matter**, or **+ New** → **Matter**). The form takes a minute; two follow-ups make it audit-proof — the conflict check is already signed (Part II).

The form

Only the client and the **Matter Name** are required.

- **Client.** Start typing in **Existing client** — it searches the whole contact book — or choose **Create new client: …** at the end of the list to type a **New Client Name** instead. Opened from a contact's page, the client is filled in and locked (*Choose a different contact* → changes it), and you go back to that contact's page when the matter is created.
- **Add case details now — court, parties, service dates** and **Set rates, engagement date and scope now** start closed; open them when you have the complaint in hand. The **Engagement Date** can be set only here, on the new-matter form. The rates are for administrators and attorneys; without them the firm's default rate applies.
- **Practice Area & Fee Arrangement.** The practice areas are grouped (Appeals, Business & Employment, Criminal & Traffic, Family, Injury, Real Property and so on) and alphabetized, and the list offers only what your firm's plan includes — see below. The fee arrangements are Hourly, Contingency, Flat Fee, Hybrid and Pro Bono; Contingency opens the contingency fee schedule on the spot.
- 📁 **OneDrive Folders.** Tick **Create this matter's OneDrive folder with the subfolders below** and the matter's folder is made in the firm's OneDrive as the matter is saved, with the practice area's subfolders (untick any you do not want, or *Add another folder…*) and a **Drafts** folder for live Word and Excel drafts (Part VIII); anything later dropped into those folders files itself on the matter. If the card says **Not set up**, it gives the reason — OneDrive is not connected, no root folder is chosen, or folder provisioning is off — and a firm administrator fixes it under Settings → **Document Sync**.
- **Assign the team** — who works the matter, and in which role. You are always added yourself.
- **Create Matter.** If something is refused — a number already in use, a conflict check your firm requires — the reason appears on the page and everything you typed stays on the form.

If the firm is at its plan's limit, the page shows **Plan limit reached** instead of the form, with **Upgrade plan** for an administrator and, when the limit is on open matters, **Close a finished matter** →.

Which practice areas you can choose

Practice-area editions appear only when your firm holds them, and a matter already filed under an area keeps it even if the edition later lapses. On the free Starter plan a matter can be filed only under Personal Injury, First-Party Property Insurance, Family Law, Criminal Defense, General Litigation or Other — and filing there does not unlock that area's specialist tools (Part I). Traffic matters go under

Criminal Defense (incl. traffic); *Foreclosure (Defense & Prosecution)* is its own area, under Real Property. If an area is refused, the page says why: *"... is not one of the practice areas included in your plan. Choose another area, or upgrade to file under it."* on Starter, and *"... is not switched on for your firm. Choose another area, or ask us to add it."* otherwise.

The two follow-ups

1. **Set the statute of limitations.** The date drives every downstream deadline. Plan → **SOL Bank** (Part VII).
2. **Put the fee agreement on file.** Your firm may require it before time can be billed. Bill → **Fee Agreement** generates the agreement (hourly, contingent, flat or hybrid); **Send for e-signature** ✍️ → sends it, or **Record Signature** records one signed on paper, through DocuSign or by email confirmation. When the terms change, **Supersede With New Agreement** makes a new version, and **Version History** keeps every one. Generating is for attorneys, associates and firm admins; recording a signature, for attorneys and firm admins.

The banners at the top of a matter

The matter's overview puts a banner above the file when something needs doing, each with a button to the fix.

BANNER	WHEN IT SHOWS	BUTTON
Needs immediate attention (red)	An overdue deadline, an overdue invoice, or no activity in more than 60 days.	Deadlines → · Billing →
Needs attention (amber)	A critical or high deadline in the next 7 days, 8 or more unbilled hours, or more than 30 days quiet.	—
No signed conflict check on file for this matter.	Until a signed conflict check is linked to the matter.	Run conflict check
No SOL entry on file for this matter.	On litigation-area matters with nothing in the SOL Bank.	Set SOL
No signed engagement letter on file — time entries blocked.	Only when your firm requires a signed engagement letter before time is billed.	Open fee agreement
Litigation hold in effect.	While a hold is placed on the matter.	Open evidence locker
A process-service or construction-lien deadline	When one is close or has passed.	Open service · Open lien

A deadline due today is not overdue, and days are counted on your own calendar in your own time zone. Where the firm does not require a signed letter, a missing or unsigned agreement shows only as a **No fee agreement** or **Unsigned agreement** badge beside the matter's name.

> **RULE NOTE · FLA. BAR**
> The matter's banners map to real obligations: the conflict check you signed in Part II (Rules 4-1.7 / 4-1.9 / 4-1.10), the written fee agreement (Rule 4-1.5), and the SOL — a missed F.S. § 95.11 deadline is the number one source of Florida malpractice claims. Post-HB 837, general negligence is **two years** for causes accruing after March 24, 2023.

The number

You do not have to invent the matter number. Your firm picks a numbering scheme once (Settings → Matter Numbering) and every matter is numbered automatically when it is saved. Out of the box that is **Year and sequence, 3 digits** — `2026-042` — and the form shows **Matter Number (optional)**: leave it blank for the next number, or type the one you need. A firm can choose `2026-0042`, `0042`, `PI-2026-0042` or `SMITH-003` instead; then the form shows the number it will assign, and a particular number — a paper file, a court reference — goes under **Advanced — type a matter number instead**. Either way, two people opening matters in the same moment can never be given the same number, and a number already in use is refused rather than quietly changed.

More than two names

A case is rarely one plaintiff against one defendant. The matter carries a **parties** list, each with its role — plaintiff, petitioner, defendant, respondent, third-party defendant, intervenor, garnishee, interested person, or other party. Add every party you know of, because two things read that list rather than the caption text: the conflicts sweep, which searches the party rows, and service, which fans out per defendant. A party you leave off is a party nobody checks.

The parties build the caption; the people *around* the case go on the overview's **Related Contacts** card — opposing counsel, a mediator, a witness, an expert, an interpreter. Press **+ Link a contact**, start typing to find the contact anywhere in the contact book (nothing is picked for you), choose the **Role** — Opposing party, Opposing counsel, Co-counsel, Mediator, Arbitrator, Witness, Expert, Registered agent, Family member, Guardian, Interpreter, Referral source or Other — add a **Note** if it helps, and press **Link**; **Unlink** takes one off. Conflict checks search every contact linked to a matter (Part II), and the contact's own page lists the matter. Linking and unlinking need **Edit matter details**, and the form appears once the firm has at least one contact.

Each matter page also shows a **practice-area panel** — the governing rules, statutes, and templates for that area — and, on its **Communications** card, the matter's own **Forward emails to this matter** address: forward an email to it and the message is logged on the matter, usually within a minute. The attachments are listed by name and size but are not saved to Documents — upload the ones you need (Part VIII). The same card's **Log** button records a call, a letter or a text by hand.

The court-rule deadlines card

On a Florida, Texas or District of Columbia matter the overview carries a **… court-rule deadlines** card: a preview of the dates that state's rules imply from the matter's **Service of Process Date**, its **First Answer / Appearance Filed** date and the trial date, each with the rule it came from and any warning the rules engine attaches. Until one of those dates is on the matter it reads *Nothing to derive yet*. The preview is not docketed; **Docket these deadlines** turns it into deadlines on the matter (Edit matter details), and pressing it again after a date changes replaces that batch rather than adding a second. If your firm or your own account cannot use that state, the card says so and names who can change it.

The right-hand rail sorts itself by urgency, so the panel that most needs attention is the one at the top. A healthy matter shows the rail in its ordinary order; a matter with a problem puts the problem first.

Changing the matter later

⚙ **Edit** at the top of any matter page, or **Edit** on the overview's **Case Information** card, opens **Edit Matter**. It needs **Edit matter details**.

- **Matter Information** — the **Matter Name**, **Court Case Number**, **Court**, **Judge**, **Trial Date**, **Service of Process Date**, **First Answer / Appearance Filed** and **Tags (comma-separated)**. The service and first-answer dates feed the court-rule deadlines card, so a wrong one can be cleared by emptying the box; a trial date can be changed here but not cleared that way.
- **Forum** — the federal district, below.
- **Practice Area & Fee Arrangement** — and, for firm admins and attorneys only, the attorney, associate and paralegal rates and the **Flat-fee package**.
- **Scope of Representation**, then **Save Changes**.
- Below the form, the **parties** editor, and — for attorneys and firm admins — **Matter Status**: a **Close Reason** and **Close Matter**, or, on a closed matter, **Reopen Matter** (Part X).

The engagement date and the matter's state are set when the matter is opened; they are not on this page.

Federal Clocks — if the case is in a district court

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>
> Reviewed and signed on 11 September 2026, against the December 1, 2025 editions of the Federal Rules of Civil Procedure, Criminal Procedure and Evidence.

A matter can be in a federal district court as well as in Florida, and until you say so nothing in the product knows it. On the matter's **Edit** page there is a **Forum** card — *second axis — the state stays the state* — with **Federal district (leave as state court if the case is not in federal court)**. All ninety-four districts are there, grouped by circuit; the search box takes a district name, an abbreviation, a CM/ECF code, a state or a circuit. Leave it alone for a state-court case. Setting it does not change the matter's

jurisdiction: a case in the Middle District of Florida is Florida *and* federal. **Divisions are not offered** — they come from each district's own local rules — so if your caption needs one, type it into the **Court** field. If the Court field names a state court while a district is set, the page tells you, because that caption would be wrong on every document generated from the matter.

Federal Clocks is on the matter's Practice menu, next to Removal Clocks, on Personal Injury, Medical Malpractice, Product Liability, Business Litigation, Employment, Real Property, Construction, Criminal Defense, General Litigation, First-Party Property Insurance and Other matters — set the district so the right holiday calendar is used. It computes the Fed. R. Civ. P. docket chain, the Fed. R. Crim. P. chain on a criminal matter, and the five Fed. R. Evid. pre-trial notice clocks — and, unlike Removal Clocks, it can write them to the matter's deadline list with **Docket these deadlines**. Part VII has the detail.

> **THE DISTRICT IS NOT COSMETIC**
> It chooses the calendar every federal date is counted against, and it is the only way the product can tell which court's holidays and which circuit apply. A matter with no district still computes — the dates can then only be the same or earlier than the rule allows, never later, and the page says so — but it is one field, and it is worth the ten seconds.

Part IV · The daily rhythm & the matter team

The dashboard sorts your day before you get to it: your matters, your deadlines, your numbers, and — in your first weeks — the Getting started card with your next step. Ninety seconds each morning tells you what the day holds.

Every matter is a single page of truth — status, the compliance card, quick actions, notes, and the activity trail — with Atticus AI one click away.

Action Center, second in the sidebar, is the worklist across every matter you can open: **Docket deadline proposals** (where a matter is linked to its court docket, a new entry that names one future date is offered as a deadline — nothing is on the calendar until someone with Edit matter details presses **Accept as deadline**, or **Dismiss**), **Due now** (overdue and today), **Conflict checks still to finish**, **Overdue invoices**, **Unbilled time**, **New leads to prioritize**, **Medical records to chase**, **New documents from clients** (the last fourteen days), **Awaiting signature** and **Recent client messages** (the last seven days). When there is nothing, it says *You're all caught up*. "Overdue" and "today" are judged on your own clock.

The menus across the top of a matter — **Overview**, **Plan**, **Discover**, **Build**, **Insights**, **Negotiate**, **Trial**, **Bill** and the practice area's own **Practice** — open with a click or a tap, and stay open until you choose a page, click elsewhere, or press **Esc**. From the keyboard, **Tab** to a menu and press **Enter** or **Space** (or ↓ to open it and step into the list). On a desktop, resting the mouse on a menu still opens it. On a phone or a narrow window the open menu spans the width of the page beneath the row, and a long one scrolls.

In the sidebar, **Practice Areas** lists the hubs that matter to you: the areas the firm chose (Settings → Display), the areas of the matters you can open — the sample matter aside — and any practice-area edition the firm holds. It can differ from one person to the next, and only when there is nothing to go on does it list every area. **All practice areas (*N* more)** at its foot reveals the rest and **Only areas you practise** puts them away; a hub still checks your access and your plan when you open it. **Trial Prep** gathers, across every open matter you can open, the **Witnesses**, **Exhibits**, **Depositions**, **Discovery**, **Timeline**, **Jury Selection**, **Motions in Limine** and the **Pre-Trial Checklist**. Witnesses, for one, splits them into *Undisclosed* and *Disclosed*, and each row leads to the matter's own witness list or to a cross-examination outline; adding and editing happen on the matter.

The matters list

Matters in the sidebar opens on four figures for everything that matches the filters — **Active Matters**, **Unbilled WIP**, **Outstanding AR** and **Trust Balance**; the sample matter is listed, badged **Sample**, but not counted among the active matters — and the tabs **Active** (the default), **Closed**, **All** and **Archived**; an archived matter appears only under Archived. The page shows up to 100 matters and says so when it stops there, so narrow it with the filters. Inside the list, *Type a matter name, number, client or case number...* narrows the rows already on the page, and the list can be collapsed — your choice is remembered.

HEALTH DOT	WHAT IT MEANS
Red	An overdue deadline, an overdue invoice, or no activity in more than 60 days.
Amber	A critical or high deadline in the next 7 days, 8 or more unbilled hours, or more than 30 days quiet.
Grey	Closed, or opened in the last week with nothing on it yet.
Green	None of the above.

The two "no activity" rules wait until a matter is more than two weeks old, and "overdue" is judged on your own calendar. The **Health:** chips — *At risk* and *Needs attention* — count and filter the rows on the page. If your account sees only the matters you are assigned to and there are none yet, the page says **No matters shared with you yet**: ask a firm admin or the matter's attorney to add you to the team.

Tags. Under a matter's title, *+ add tag (urgent, on-hold, ...)* takes a short label and × removes one. Tags are lower-cased, spaces become hyphens, and a tag is letters, digits and hyphens, up to 32 characters; a matter holds up to twelve. Click a tag and the matters list opens filtered to it; the list's **Tags:** strip offers the most-used ones. Tags can also be typed on the new-matter form and on Edit Matter, and adding or removing one needs **Edit matter details**.

Saved views on the matters list

Set your filters, choose a sort and tick the columns you want under **Sort & columns**, then open **Save / manage views** and name it — "My open PI files", "At risk". It becomes a tab on the **Views:** strip above the list, beside **All active**, and you come back to it with one click.

- **A view is just a link.** Paste one to a colleague and it shows them *their* matters, not yours — the view carries the filters, never the access.
- **Pin as a tab** is per person. An attorney or firm admin can also **Share with the firm**, and everyone then decides for themselves whether that tab sits on their own screen. Anyone else who ticks Share is told the view was saved unshared rather than losing it.
- **Update to current** replaces a saved view's filters with what is on screen; saving again under the same name does the same thing. You may keep up to thirty.
- The columns you can add are Matter number, Client, Practice area, Stage, Lead attorney, Next deadline, Unbilled time, AR and Last activity. The matter's name and its health dot always show. **Stage** is inferred from the matter's own dated record, which is why it is a badge you can hover and not a column in the export.
- Searches saved in your browser before views existed still work, under **This browser:**. Nothing new is written there — re-save one as a view and it gains sharing, pinning and your other devices.

Doing one thing to many matters

Every row now has a checkbox, with **Select all visible** above the list and a **{n} selected** badge so you always know how many. With rows ticked you can **Assign** someone to the team in a named role, **Tag** or **Untag**, **Close** with a reason, or **Export CSV**.

> **FIFTY ROWS ARE FIFTY DECISIONS**
> A refusal on one matter does not roll back the other forty-nine, and it is never swallowed: the message names the matters that were refused and why, in the matter page's own words. A bulk close is *stricter* than closing from the matter page — money left in trust and unpaid invoices become refusals rather than advisory checklist lines, because nobody is looking at that file. Open it and close it there.

Matters are worked by teams, so every matter has one. Open the matter and choose **Team** in the right-hand rail.

ROLE ON THE MATTER	WHAT IT MEANS
Lead attorney	Responsible attorney of record.
Co-counsel	Shares responsibility for the matter.
Timekeeper	Works and bills the matter — associates and paralegals.
Observer	Can see the matter but is not working it.

> **ASSIGNMENT IS ALSO ACCESS**
> If your account is limited to assigned matters, being on this list is what gives you access to the file. Come off the team and the matter goes with it. That is deliberate: it means access follows the work rather than being maintained separately.

My Tasks

My Tasks in the sidebar is your working list across every matter you can see — the header counts how many are on you, how many are overdue and how many are on nobody: *Overdue* first, then *On you*, then *On nobody yet* — the ones the app could not put a name to, which are the ones that go missing at a firm. Overdue items also reach your Morning Brief. ✓ **Mark complete** closes one; it then appears under **Recently completed by you**, where **Mark not complete** undoes it. Completing a task needs **Edit matter details** on that matter, although the button shows to everyone.

Most of what lands there is not typed by anyone. A matter has no stored stage: Trial Commander reads its posture from the dates already on the file — the engagement, the docket, hearings, depositions, the trial setting — and the first time a matter reaches a stage, that stage's checklist opens on the matter once, at **Plan** → **Tasks**. Each task says what "done" looks like, names the manual section its wording came from, carries a target date and lands on a person by role. You can add your own alongside them.

> **A TASK IS NOT A DEADLINE**
>
> Nothing on the Tasks tab is computed from a court rule, nothing is acknowledged, and nothing ticks itself because a related record appeared. A target date on a task is a target. The deadline engines remain the only thing that computes a court date, and the Morning Brief is told in as many words never to count a task as one.

Finding things

Search or jump to... is the box at the very top of the sidebar (on a phone, the **Search...** box in the top bar). It opens the same quick finder as **Ctrl K** (⌘K on a Mac): start typing a matter's name or number, a contact's name, telephone number or e-mail address, or the name of a page, and press **Enter**. A number finds the contact however it was typed or stored — *3055550143* finds *(305) 555-0143*. Words from PracticePanther and Clio work too: *payments* finds Billing and Trust, *expenses* finds Billing, *events* finds the Calendar and a matter's Hearings, *notes* finds a matter's Notes, and *files* finds its Documents. The last line is always **Search everything for "..."**, which hands your words to the full Search page below.

Search in the sidebar used to look only at matter records. It now reads inside the firm's files and its mail as well: type a phrase and you get the passage out of the PDF, the logged call note or the filed e-mail thread that contains it, with your words highlighted and a link straight to it. Five chips narrow the answer — **Everything**, **Matter records**, **Documents**, **Email**, **Communications** — a tick box brings closed matters in, and the address bar carries the state, so a result page is a link you can send someone. Once Trial Commander has connected its search-by-meaning service, a hit found by meaning rather than by the words you typed is labelled **related**, so you are never left wondering why it is there; until then Search matches your words only.

- **Results cover the matters you have access to, not the whole firm**, and the page tells you when that has narrowed the answer — "no results" and "no results you may see" are different answers.

- **Filed e-mail is found by meaning, never by its words** — so it reaches Search only once Trial Commander has connected the search-by-meaning service; until then find it from the matter's own Email page. It is encrypted at rest and the index keeps it that way, and it is indexed only while that matter's *Allow AI to read filed email* switch is on.
- **Some things are never indexed at all** — identity documents, trust and Ledger rows, and every matter set to on-device AI only. Those matters stay fully findable through the matter-record search, which never leaves the database.

Part V · Contacts, clients & the portal

Contacts in the sidebar is the whole contact book — clients, opposing counsel, experts, witnesses, referral sources. *Client* is a role someone holds on a matter, not a separate record, which is why the check you ran in Part II follows the same person into the file.

Names

Pick the **entity type** first, because nothing here guesses. An individual gets three boxes — **Last name**, **First name**, **Middle name**; a business, government body, estate, or trust gets the single name box it has always had.

- A person is listed as *Last, First M.* and filed under the last name, so the contact list sorts the way a paper file drawer does.
- Type the middle name in full. It is stored in full; only the list shortens it to an initial.
- Documents, captions, and conflict checks keep reading the name left to right — the filing order is a display, not a rewrite.
- A contact created before the boxes existed keeps its stored name and is not split automatically. Filling the parts in is a person's decision, made once, on the contact.
- A contact created from a single name box — **New Client Name** on the new-matter form, or a conflict check saved as a contact — has its last, first and middle names filled in only when the name can be read one way. A name that could be read two ways is kept exactly as typed.

Finding a contact

The Contacts list opens collapsed; **Show all … contacts** opens it and **Collapse list** closes it again, and your choice is remembered. There are two searches, and they answer different questions. **Search contacts…** at the top looks through every contact the firm has by name or email. *Start typing a name, email or phone…* inside the list narrows the rows already on the page, at once. The list is one A–Z run, filed by last name (names that don't start with a letter under #), and a gold **… active** badge counts each contact's open matters. It holds the first 1,000 contacts by name; past that, the search at the top is how to reach the rest. Tags are on a contact's page, not in the list: click one there and Matters opens filtered to every matter of a contact with that tag.

Adding a contact

+ New contact on Contacts, or **+ New** → **Contact**. Pick the **Entity type** first (above), then the **Contact category** — *Client* unless you change it; opposing counsel, experts, witnesses, adjusters, referral sources and the rest are categories too — and any **Tags (comma-separated)**, then the email, phone and addresses. Three things to know:

- **Only a Client is a client.** The client portal, invoices and trust money are for contacts in the Client category; the app refuses them for any other category.
- **Conflict Check Notes are notes.** They are kept on the record but do not mark the contact as conflict-checked — only a signed conflict check does (Part II).
- **OneDrive Folder** appears when your firm has OneDrive folders set up, and creates the contact's folder as you save.

Creating a contact needs **Create contacts**, and changing one **Edit contacts** — attorneys and firm admins by role, anyone else by an administrator's switch.

A contact's page

Across the top: **Run conflict check** (Create new matters), **Edit**, **Merge into another contact...** (Edit contacts), **Archive** (firm admins only) and **+ New Matter**, then four figures — Active Matters, Unbilled WIP, Outstanding AR and Trust Balance. The **Contact** card carries the details, the **Portal Access** line (below) and the **Conflict Check** line, which says *Cleared* with a date only once a check has been signed; the **Identity document** card sits beside it. The **Conflict checks** card lists every check run for this person — one that was not started from the contact is marked *matched by name*, and a hit on a matter you cannot open is counted, not named — and **Consultations** is the diary. **Matters** lists every matter the person is on, in whatever role, and says how many more are outside your access; **Recent Activity** is beside it.

When the same person is in twice

Two things now guard against it. On the new-contact form, and in the **New Client Name** box on the new-matter form, an amber panel appears the moment a typed name matches a contact the firm already has — *"A contact with this name already exists."* — and lists the matching records as links you can open in a new tab. It is a warning and never a block: nothing is disabled, and you may go ahead if it really is a different person.

Where the duplicate is already there, a contact's page carries **Merge into another contact...** beside **Edit**. It takes three screens:

1 · PICK	2 · REVIEW	3 · CONFIRM	4 · DONE
Records with the same name are listed first, under `SAME NAME` ; `SEARCH EVERY CONTACT` finds a duplicate that was spelled differently.	Every row that would move is listed — including the ones that are zero — plus what follows its matter, which empty fields would be filled, and what happens to the portal login and the conflict clearance.	Type the name of the record being merged away. `MERGE AND ARCHIVE` writes it all in one step.	The screen reads the audit record back and lists what actually moved.

- **The direction can be swapped on the review screen — Swap — keep *the other record* instead —** before anything is written.
- **Details are filled in, never overwritten.** Only a field that is empty on the surviving record is filled from the other one. Two things are deliberate exceptions and both are printed on the review screen: a text-message opt-out always carries across (consent never does), and a signed conflict clearance carries across only where the surviving record has none.
- **The old record is archived, not deleted**, with a pointer to the one that survived — so an old bookmark, portal link or e-mail still lands on the right person.
- **It cannot be undone.** The review screen says so in red. Once two sets of matters and intakes are on one record, nothing in the data says which came from where.
- **Two portal logins is a refusal, not a choice.** If both records have their own client-portal sign-in, the merge stops and tells you to turn portal access off on one of them first, so nobody's login disappears without the firm deciding it.

Merging needs **Edit contacts** — a role permission for attorneys and firm admins, and a switch an administrator can grant anyone else. The refusal says so by name.

What a contact records that you did not type

Two of the cards on a contact's page are records rather than notes, and both matter after the fact. The **Consultations** card is the diary of who was seen and when. The **Bankruptcy disclosures** card (Part II) is the § 527 record: what was delivered, to whom, when, by which route, and — where it went out on a link — the name they typed, the time, the IP address, the browser and the hash of the exact text they were shown, re-hashed when they acknowledged it and compared. An acknowledgment of text that has since changed is evidence of nothing, so the app will not pretend otherwise. A paper delivery records the date and who handed it over and says *Delivered on paper*, with no IP address and no typed name, because that is the truth about it. Neither record can be edited afterwards; a mistake is corrected by recording a new delivery.

Status updates to the client

Client Updates (sidebar, under Communications) is where a status e-mail to a client is written and tracked; a matter's **Send Client Update** link and the close-out card's *Update client* and *Closing letter* rows open the same form with the matter filled in. Choose the matter — only matters you can open are

offered — then the **Recipient name** and **Recipient email**, a **Subject** and the **Body** (plain text; a blank line starts a paragraph). Under **When to send** pick **Send now**, **Schedule for later** with **Send at (your time)**, or **Save as draft**, and press **Continue**.

- **Scheduled updates** go out on the first run after their time; the run is every fifteen minutes.
- The list's tabs are **All**, **Drafts**, **Queued** and **Sent**, and each update reads *Draft*, *Queued*, *Sending*, *Sent*, *Failed* or *Canceled*.
- Open one to act on it: a draft or a failed update has **Send now**; a draft, queued or failed one has **Cancel**; anything not yet sent can be deleted. A sent update stays as the record.
- **Each update goes out once.** If a send is interrupted and the update still reads *Sending* ten minutes later, it is marked *Failed* with a note and is *not* sent again by itself — the e-mail may already have left, so check before you press Send now.

Writing, sending and cancelling updates need **Edit matter details**.

The portal

Clients get their own secure view of their matter, in English or Spanish — whichever they choose. Invite them from their contact page, not from the matter: the Contact card's **Portal Access** line has **Invite to portal**. Only a firm administrator sees that button; only a contact in the Client category, with an email address, can be invited; and there is one live invitation at a time, good for seven days. A portal client is not one of the firm's seats: portal logins never count toward the firm's users or its bill, and no seat limit — Starter's single seat included — refuses a portal invitation.

- **Always shown:** the matter's status, case number and court; its next twelve open deadlines; its invoices; the trust balance held for the client; appointments; and anything waiting for their signature.
- **Shown only when you share it:** a logged communication (**Share with client portal**), a generated document (**Share** on the matter's Generated Documents card) and a daily trial report.
- Everything the client sends lands on the matter, not in your inbox, and every portal visit is recorded on the audit log. **Preview Client Portal** on the matter shows you exactly what they see.

Asking the client for documents

On the matter, Overview → **Doc Requests** is the checklist of what the client owes you. Name the document (*e.g. 2023 W-2*), add guidance if it helps — where to find it, what format — and press **Add request**; the client is told in the portal and by e-mail. In the portal, under **Documents Your Firm Needs**, they press **Upload** beside each one; anything else they want to send goes through the portal's upload box and **Send to firm**. A portal file can be up to 10 MB, and the portal says so. When a requested document arrives the request reads *received*, with **Download received document** ↓; **Waive** marks one no longer needed, and ✕ deletes a request — refused while the matter is under a litigation hold. No notification is sent when a client uploads, so watch the page, and the Action Center's **New documents from clients** (Part IV). If the client has not yet accepted a portal invitation, the page says so; the requests wait for them.

Appointments the client asks for

In the portal, **Request an appointment** offers the next fifteen weekdays and the times 9:00, 10:00 and 11:00 AM and 1:00, 2:00, 3:00 and 4:00 PM, with room to say what it is about. It is a request — the portal says *This is a request; your firm will confirm the time.* — and up to three people on the matter team are told. On the matter, Overview → **Appointments** lists them: **Confirm** — with a different day or time if needed (*Reschedule day (optional)…*, *Reschedule time (optional)…*) and a *Note to the client* — or **Decline**; a confirmed one has **Cancel appointment**. Answering for the firm needs *Schedule consultations and work the booking queue* — attorneys and firm admins by role, anyone else by an administrator's grant (since 4 October 2026). The client is told each time, in the portal and by e-mail. An appointment marked as a no-show is not shown to the client.

Part VI · Time, billing & trust

You can always log time by hand. **Chronicle** turns work you record as it happens into **draft** time entries: a block you capture with rough notes, or a day's events from your connected calendar when you ask it to import them. The AI drafts the billing narrative, and nothing bills until you review and approve it. Chronicle comes with the Silver plan and above, and with the trial; on Starter and Bronze its Capture page shows an upgrade panel instead. If your firm connects its phone system (Twilio or RingCentral), each completed call of ten seconds or more lands in the **Phone Log** marked as auto-captured and billable, waiting to be reviewed and converted like any other call — and **$ Billable rescue** (below) finds the ones nobody converted.

The timer

Every plan has a timer, the free Starter plan and the trial included. On a matter's **Time** page, **▶ Start timer** starts it; a bar at the bottom of every page then shows the clock and a **■ Stop** button, and **Timer** → opens the full timer page, where you can pause and resume, write what the work was, switch to another matter in one step, or discard the timer without recording anything. You have one timer at a time, kept by Trial Commander rather than by the browser, so your laptop and your phone show the same clock. Stopping it saves a **draft** time entry rounded up to the firm's billing increment (6 minutes unless a firm administrator changes it in **Settings** → **Firm Policies**); the draft waits on the matter's **Captured** tab until someone presses **✓ Accept**, and only then can it reach an invoice. The timer needs a connection. One-tap quick entries such as *0.2 · Call*, and capturing time with no signal, are switched on for a firm by arrangement. The timer is there for anyone whose role may log their own time, and for no one else.

Logging a call, and billing it

Phone Log (sidebar, under Communications) is where calls live. Log one from **+ New** → **Phone call**, a matter's **Log Call**, **Ctrl K** → *Log a phone call*, or the Phone Log itself. **Log a Call** asks for the direction, when it started, who it was with, the matter and client it belongs to, a one-line **Subject**, and **Notes** — which become the time-entry narrative. A call is billable unless you say otherwise, at 6 minutes (0.1 hr)

unless you change it. The list filters to **All**, **Unbilled** and **Converted**. Open a billable call and **Convert to time entry** → makes the time entry, with a UTBMS task code (L120 unless you pick another); it is refused, with the reason, when the call has no matter or the matter has no hourly rate.

The communications log

Communications in the sidebar logs everything else — an email, a meeting, a letter — against a matter, from the matter's **Log** button, **+ New** → More → **Communication**, or the Communications page. **When** is on your own clock, and **Billable?** is *No* unless you say otherwise. A billable entry converts into a time entry the same way (**Convert to time entry** →); the narrative names the communication — direction, channel, subject, counterparty, minutes — and copies the message itself only if you tick **Include an excerpt of the message**, which is off unless you tick it. **Share with client portal** puts an entry on the client's portal; **Log another** starts the next one; an entry can be deleted only until it has been converted. Logging a call or a communication needs **Edit matter details**, and converting it needs permission to log your own time.

Calls and messages nobody converted

Time Tracking → **$ Billable rescue** lists the billable calls and communications on your matters that never became time entries, over the last **7d** (the default), **14d**, **30d** or **90d**, in two lists — calls and communications. Only an item linked to a matter that has an hourly rate can be converted; the others say why. Tick the ones to bill, add a UTBMS task and activity code if you use them, and press **Convert *N* items (*X.XX*h)**: each becomes a time entry linked to its source, and you can polish the narrative on the entry afterwards. A communication's message is copied into its narrative only when **Include an excerpt of the message** is ticked; it starts off. Up to 100 of each are shown, and the page says how many more there are. It needs permission to log your own time.

Many time entries at once. On **Time Tracking**, tick entries — Shift+click ticks a run of them — and a bar appears: *N selected*, **Mark billable**, **Mark non-billable**, **Delete** (after a confirmation; it cannot be undone) and **Clear**. An entry already on an invoice is refused with *Already billed — void invoice first*, and changing someone else's entries needs the permission to change anyone's unbilled time.

Chronicle, step by step

- **Capture** (Chronicle in the sidebar). **Capture a block (manual)**: the start and end, the matter (type to find it, or *Assign later*), your rough notes — what you actually did — and whether it is billable, then **Capture block**. **Import from calendar**: pick the **Day** and press **Import day's events** to turn that day's events on the calendar you connected in Settings → **Calendar Sync** into pending blocks; events already imported are skipped. The filters are **Pending**, **Approved**, **Rejected** and **All**. The AI drafts each block's narrative and suggests UTBMS codes, you have the final say, and an approved block becomes a time entry. The desktop and browser capture companions are by arrangement.
- **Today** — one day at a time, with arrows to the day before and after: tiles for **Captured**, **Pending**, **Approved**, **Manual entries** and **Unaccounted**, a timeline, and every gap of 30 minutes or more

between 8 a.m. and 6 p.m. in your own time zone.

- **Audit** — your own time entries as a fee dispute or a grievance would read them, over 7, 14, 30 (the default), 60 or 90 days: entries typed more than two days after the work (*High* past a week, *Medium* past three days), manual entries on days with no captured activity, and exact duplicates. Each finding takes an **Add Rowe note** (up to 500 characters) explaining it, or **Dismiss**.
- **Chronicle coverage** — on a matter, Bill → **Chronicle coverage** (or Ctrl K): what was captured, pending, approved, billed and entered by hand on that matter over 30, 90 (the default), 180 or 365 days, and a **Rowe-defense PDF** of it for a fee dispute.

A matter's Billing tab

Bill → **Billing** shows four figures — **Unbilled WIP** (*Unbilled hours (cost)* on a flat-fee package), **Total Billed**, **Total Paid** and **Outstanding AR**. When there is unbilled time, a pending cost or an uncharged package, **Generate Invoice from Unbilled Time** (**Generate Invoice** on a package) → **Generate Draft Invoice** rolls it into a draft. Each invoice in the list then offers **Finalize & Send**, **Record Payment**, **LEDES ↓** once an hourly invoice is issued, and **Void** — which asks why (at least five characters), returns its time and costs to unbilled, and is refused once a payment is recorded. Drafting an invoice is for firm admins, attorneys and associates, and anyone granted it; finalizing, recording payments, voiding and the LEDES file are for firm admins and attorneys.

Trust accounting sits alongside, with gates that stop money moving incorrectly: three-way reconciliation, and a fee transfer that will not move until it matches an invoice.

The invoice opens before it is sent

An invoice is a page you can open, not a button that fires. Click any invoice number and it opens on its own page. While it is a **draft** — the amber line at the top says so, and the number is already reserved — you can change the issue and due dates, add an adjustment (a negative number is a discount), pull unbilled time or costs in, and release a line back out of it. **Preview PDF** shows the client's view before anyone sees it, stamped *DRAFT — NOT YET ISSUED*.

A draft also carries **One-time fees & discounts**. Choose the kind — *Flat fee*, *Discount — amount* or *Discount — % of invoice* — write the **Description the client reads**, enter the **Amount ($)** or the **Percent (%)**, and press **Add**; **Remove** takes one off. A percentage is taken from the invoice before discounts — fees, flat fees and costs — and follows the lines as they change until the invoice is issued. A discount that would take the total below zero is refused. The PDF lists the flat fees under *Additional Fees* and names each discount.

Nothing leaves the firm until someone with the authority presses **Finalize & send**, which marks it sent, locks the lines, and notifies the client's portal. A draft with no lines cannot be sent at all. After that, the page is where the invoice is read, paid, exported, or voided — and voiding asks for a reason, returns every line to unbilled, and is refused once a payment is recorded.

The PDF and the e-billing file. An issued hourly invoice also offers **LEDES ↓**, a LEDES 1998B file for clients and carriers who take bills electronically; UTBMS codes are optional, and coded and uncoded entries can sit on the same invoice. A flat-fee package invoice has no LEDES file — its hours are covered, not priced — so the PDF is its export, listing the hours under *Work Performed (covered by the flat fee)* without prices.

Opening an invoice needs access to the matter, an assigned paralegal included. What you may *do* on it is a separate question, gated action by action.

Recording a payment

Firm admins and attorneys record payments — a check or a wire does not post by itself (a client's card payment in the portal does, where your firm has that, Part XV). On the invoice's page the date starts as your own today and the amount as the balance; choose **Check**, **Wire**, **ACH**, **Card**, **Cash** or **From Trust**, add a **Ref #**, and press **Record payment**. The matter's Billing tab offers the same, without Cash. Each payment then has its own **receipt** PDF.

> **FROM TRUST MOVES CLIENT MONEY**
>
> Paying an invoice *From Trust* writes the matter's trust ledger in the same step, so it needs the permission to withdraw earned fees from trust as well as the one to record payments. Treat it as the trust transfer it is.

The firm's invoices

Billing under Time & Billing — firm admins and attorneys only — is every invoice in the firm. The header counts the open invoices and the AR. Five aging tiles cover every sent invoice in the firm that still carries a balance; drafts are not in them, and they do not change with the tabs. **Open**, **Paid**, **Void** and **All** list the most recent invoices, up to 100, and say so when there are more; the **By timekeeper** card shows each person's work in progress now and what was billed in the last 30 days. Click an invoice to open it; with none yet, the page offers **Pick a matter to bill**.

Fee Agreements, under Time & Billing, lists for the matters you can open the agreements *Awaiting Signature* and those *Signed*; each row opens that matter's Fee Agreement page (Part III).

> **PRACTICE TIP**
>
> Log time as you work and log every call. These two habits carry everything else — the invoice, the realization report, and the contemporaneity your record needs.

Reports

Reports under **Time & Billing** in the sidebar is one page holding six:

REPORT	THE QUESTION IT ANSWERS
WIP aging	Unbilled billable time by matter, bucketed by how old the work is.
Realization	Worked, billed, written off and collected — by attorney, practice area or matter.
Pipeline by practice area	Open matters by stage, and how many opened and closed each month.
Referral-source performance	Matters and fees collected by marketing source and by referring counsel.
SOL exposure	The firm's limitations bands, and the matters carrying no bar date at all.
Area profitability	What each practice area earns, by fee model, with cycle time.

Pick one and you get its filters — **From** and **To** dates (the last twelve months unless you change them) with **Attorney** and **Practice area** filters for realization (which also has **Group by**), pipeline and referral sources; **As of** dates with the same two filters for WIP aging; **As of** dates alone for SOL exposure; and From and To alone for area profitability — then the report as a table with its headline figures, the caveats printed underneath it, ↓ **Export CSV (Excel)**, ↓ **Export PDF**, and ✉ **Email me this monthly** — which puts the report in your inbox on the first of each month with the numbers in the body, not just a link.

- **The four financial reports** — WIP aging, realization, referral sources and area profitability — need **View firm-wide financial reports**, which admins and attorneys hold by role. It is not a switch anyone can be granted.
- **The two matter-count reports** — pipeline and SOL exposure — are open to anyone who can read a matter.
- **Four of the six are scoped to you**: every figure is computed over only the matters you may open, and the page says so in as many words. A colleague with wider access will see larger numbers for the same filters.
- **SOL exposure is deliberately not scoped.** It counts every open matter in the firm — a limitations date on a matter you cannot open is still the firm's exposure — and names only the ones you may open. Its bands are *Overdue — the bar date has passed*, *30 days or less*, *Within 90 days* and *Within 180 days*, plus the matters with no limitations date at all, and the **You can open** and **Withheld** columns split each count. **Area profitability** is firm-wide too: it adds up the whole firm, leaves out the sample matter, and is for those who hold financial reports. The page's **Who sees what.** panel says all of this in as many words.
- A dash in a cell means "no denominator", not zero. WIP counts time that is unbilled *and* billable — not drafts, not invoiced, not written off — and the age runs from the date the work was done, not the date you typed it up.

The monthly email re-checks your role and your matter access on every send, so a report stops arriving when it should without anyone deleting anything.

Part VII · Deadlines & the SOL

Deadlines are calculated wherever the product can calculate them. Add a trigger date and the chain follows, counting court days and Florida holidays; what no engine owns, you add by hand. Everything rolls up firm-wide on **Deadlines** in the sidebar — *Overdue*, *Next 7 days*, *Next 30 days*, *Later*, *No date* and *Completed*, with a **Calendar conflicts** card when two matters have something on the same day, and a reminder that a missed deadline can be a Rule 4-1.3 diligence problem when anything is overdue. Administrators and attorneys can switch between **All matters** and **My matters**; everyone else normally sees only the matters they are assigned to. *Overdue* is judged on your own calendar, in your own time zone, and a deadline due today is not overdue.

One habit worth building: check that view before you leave on Friday.

A matter's Deadlines page

Plan → **Deadlines** on a matter. The header counts what is upcoming and what is overdue. From the top:

- **Docket an Event (auto-create deadlines).** Pick a Florida docket event, its **Event Date** and — only if the event is the service of a paper — the **Service Method**, then **Docket and Auto-Create Deadlines**: the engine creates every deadline the event triggers. The card itself states the computation rule it applies (Rule 2.514) and when the five mail days are added; read it there. It shows on every matter, but its events are Florida's rules only — a Texas or D.C. matter is computed on the court-rule card on its overview (Part III).
- **Service / Response Calculator.** A scratch pad for one response date: **Date served** (today unless you change it), **Response window (days)**, **Service method** — FL e-Filing Portal, Email, Hand delivery, or U.S. Mail only, the one choice that adds days, as its label says — and **Day-counting**, calendar or business days. **Response due** appears as you type, with a note when the count fell on a weekend or holiday and rolled forward; it counts against the matter's court calendar, closures included. Nothing is saved or docketed.
- **Trigger events.** The auto-created deadlines, grouped by the event that set them off. If a trigger date moves, enter the **New trigger date** and press **Shift & recompute**: every dependent deadline is recomputed, with no need to delete and re-docket.
- **Docket statute of limitations.** Choose the **SOL category** (those *Suggested for this matter* come first) and the **Accrual date**, and press **Docket deadlines**: the bar date, any statute of repose and any pre-suit-notice reminder are added to the matter's deadlines, and pressing it again for the same category and date replaces that batch. The categories are the matter's own state's — Florida, Texas or the District of Columbia; a matter anywhere else gets a notice to verify local law instead of the form. These dates go on the deadline list and the calendar but *not* into the SOL Bank, so SOL Watch lists them as a limitations date it cannot verify. For the record SOL Watch reads, use Plan → **SOL Bank** (below).

- **Add Deadline (manual).** Description, Due Date, Rule / Statutory Basis, and a Priority — Low, Medium, High or *Critical (Statute of Limitations)* — plus the reminders below.
- **The list.** Tick a row's box to complete it, or delete it. A deadline the engine created says *via* the event it came from; one carried over from your previous system is marked *imported*.

Adding, completing and deleting need **Edit matter details**. When you have connected Outlook or Google Calendar, a **Calendar routing** card chooses which of your calendars this matter's dates go to.

The Florida Deadline Calculator

Tools → **FL Deadline Calc** (or Ctrl K) answers "when is it due?" without a matter. Pick one of the twelve **Common Deadlines** — answering a complaint, rehearing, new trial, a notice of appeal, costs, fees, responses to summary judgment, discovery and requests for admissions, expert and pretrial exhibit disclosures, accepting a proposal for settlement — or enter the **Trigger Date**, the **Days**, the **Day Counting** and the **Service Method** yourself, and press **Calculate**. The **Computed Deadline** comes with badges — *Rolled forward*, *+5 days for mail service*, *Business-day counting* — a line explaining any roll or mail days, and the page's **Rule Reference**. Nothing is saved or docketed, and the result carries the reminder **Attorney verification required.**

The order it works in is the rule's, and the matter's Deadlines page uses the same one: (1) count the period under Rule 2.514(a); (2) if the last day is a Saturday, Sunday or legal holiday, roll it forward to the next day the clerk's office is open; (3) only if the period runs from *service* of a paper served only by U.S. mail, add Rule 2.514(b)'s five days; (4) if the new last day is a weekend or legal holiday, roll it forward again. The five days never reach the answer to a complaint — service of original process is not service by mail — or a period that runs from a verdict, a judgment or rendition, such as the motion for new trial or the notice of appeal.

Reminders to the team

The add form ticks **1 week before** and **The day before** for you; the other choices are 30 days before, 2 weeks before, 3 days before and The morning it is due. Every open row — typed, docketed or imported — carries **Reminders: ...**; change the ticks and press **Save reminders**. A deadline that was on the matter before reminders existed sends none until someone sets them.

- **Who.** The people named on the deadline (the **Whose** control on the Calendar); if nobody is named, everyone assigned to the matter; if nobody is assigned, whoever set it. Only people who can open the matter receive them, and the form says who, by name, before you save.
- **When and how.** The morning of each day you tick — the daily run is 13:00 UTC, 9 a.m. Eastern in summer and 8 a.m. in winter — in the bell and as a push; by e-mail too, for anyone who turns on *A reminder set on a deadline* in Settings → Notifications.
- **Sent whatever you tick.** An alert to you straight away if the date is inside the next 7 days; the client's own portal reminder a week before and the day before; and a pop-up the day before on the connected Outlook or Google calendar the deadline goes to.

A matter's SOL Bank

Plan → **SOL Bank**. **Add SOL Entry**: choose the **SOL category** (those suggested for the matter's practice area are listed at the top of the card), the **Claim accrual date** — when the claim arose (the accident, the breach, the discovery), not when suit was filed; the clock runs from it — and, where there is one, the date the **Pre-suit notice** was served. **Save SOL entry** puts a CRITICAL deadline on the matter, plus a HIGH pre-suit notice deadline where the category has one. An entry can later **Record service** of the pre-suit notice, or be taken off with **Remove (also deletes linked deadlines)**. A limitations date carried over from your previous system is shown separately, under **Imported from your previous system** — never mixed into the dates computed here — and the page says so when it disagrees with one of them. The SOL Bank works on matters in a state whose limitations registry has been reviewed and signed — Florida, Texas and the District of Columbia — that your firm and your account may use; anywhere else it says why.

SOL Watch

SOL Watch in the sidebar is the firm's limitations net: every limitations bar across *every* open matter in the firm, with no cap on the count. Four numbers sit across the top — the bar dates at risk now (overdue or within 30 days), the matters with no computed bar date at all, the open matters swept, and the entries docketed.

> **THE SECOND NUMBER IS THE DANGEROUS ONE**
>
> A matter with *no* limitations date docketed is listed as loudly as one running out, because they are the same exposure. A page that shows you only the clocks you already set cannot catch the matter nobody is watching — which is the one it exists to catch. Matters you are not permitted to open are still swept and still counted; what is withheld is the matter's name, never its count.

Matters in a court not of record are labelled as such, so a rule set that does not apply is never implied, and a matter in Texas or the District of Columbia is computed on its own jurisdiction's registry — never on Florida's.

Federal removal and remand

On a matter in federal court, or one you are removing, the matter's **Removal Clocks** tab computes the 28 U.S.C. §§ 1441–1455 windows, counted under Fed. R. Civ. P. 6(a), with the citation printed beside every date:

- The 30-day notice-of-removal window — **per defendant**, because § 1446(b)(2)(B) gives each served defendant its own, and § 1446(b)(1) takes whichever of its two triggers gives the *shorter* period, not the later one.
- The one-year diversity limit of § 1446(c)(1), shown for what it is: a bar a court may excuse, not a deadline.

- The 30-day motion to remand under § 1447(c), and the § 1453(c)(1) window to seek review of a class-action remand order.
- On the criminal track, § 1455(b)(1) — 30 days after the state-court arraignment, or before trial, whichever is *earlier*.
- For a claim related to a bankruptcy case, § 1452 states no period at all, so the panel computes nothing and says why. Borrowing § 1446's 30 days would be inventing a deadline.

Federal Clocks

Practice → **Federal Clocks** computes the Federal Rules chains for a matter in a district court, counted under Fed. R. Civ. P. 6(a) against the calendar of the matter's district (Part III says where the district is set and which practice areas have the page):

- **The forum** — the district and circuit from the matter's edit page. With no district set, the card says in amber that the state-holiday branch is not applied, so every date is the same as or earlier than the rule allows, never later.
- **Facts on the matter** — the service date, the first answer or appearance, and the trial date, read from the matter itself; *Edit the matter* to change one.
- **Dates this product has no field for** and **Questions the rules ask** — the other triggers, and the questions some periods depend on. A period that depends on an unanswered question is not docketed until it is answered.
- **Civil chain — Fed. R. Civ. P.**; on a criminal matter **Criminal chain — Fed. R. Crim. P.**; and **Evidence notices — Fed. R. Evid.**
- **Editions and coverage** — including that local rules are not computed anywhere in this product.
- **Docket these deadlines** writes them to the matter's deadline list (Edit matter details). Docketing again after a fact changes replaces that batch rather than adding a second copy, and anything already marked complete is left alone.

> **TWO FEDERAL SURFACES, AND WHAT NEITHER DOES**
> Removal Clocks and Federal Clocks are the federal deadlines the software works out for you. Neither computes the bankruptcy or appellate rules, a district's local rules, or a judge's scheduling order — those you docket by hand, the same way you would any date the engine does not own. A bankruptcy matter has Removal Clocks but no Federal Clocks; an appellate matter has neither.

Part VIII · Documents & drafting

Documents live on the matter, under Build → **Documents**: drag them in or add them there. Forwarding an email to the matter's address (Part III) files the message only — its attachments are listed by name and size but are not saved to Documents, so upload the ones you need. (Where your firm has Email on the

matter, Part XV, a thread's attachments do arrive in Documents.) The **Drafting Studio** writes first drafts from the matter's actual record with more than a hundred legal drafting skills, and cite-check verifies case citations before you file once Trial Commander has connected its citation service (until then, check them by hand). When productions land, **AI Discovery Review** reads them alongside you and flags what matters. Both come with the Silver plan and above, and with the trial.

Folders on the matter

The matter's Documents tab opens on a folder tree, and the practice area's folder list is there from the first paint — a personal-injury matter shows **Medical Records**, **Bills & Liens**, **Experts** and the rest before anything has been filed. A breadcrumb starting at **Documents** says where you are; clicking a folder narrows the list to it.

- **Uploading asks where it goes.** The **Add a document** card carries a **Folder** picker, with — *matter root* — at the top. Choose a category and the picker pre-selects the folder that matches it — filing something as medical records lands it in Medical Records — and says *Chosen for you from the category.* You can always override it.
- **How big a file can be.** The Documents tab sends a file straight to storage, so large files upload on most networks, and files up to 10 MB always do. A **Bates production** sends its PDFs straight to storage too, and they are stamped on the server while you wait (or leave — the production appears under Bates Productions when it is ready): up to 150 MB and 100 PDFs per production, each PDF up to 10 MB always uploads, and a larger production is split into two — the second starts at the next number, so the numbering carries on. A PDF packed with links or annotations (a very long run of printed emails, say) can be refused as *too complex to stamp in one piece*: split that PDF into smaller ones, which can stay in the same production. **Cancel upload** while the PDFs are uploading stops the production — nothing is stamped and no Bates number is used. Most other places that take a file — a contact's intake or engagement, Ledger, an appointment attachment, the Feedback button — take up to 10 MB, and say so under the picker. A larger file there is refused before anything is sent: compress it (reduce the PDF's size, or split it) and try again, and if you need a larger file taken, ask your firm administrator. A voice memo can be 10 MB, about ten minutes: the recorder shows how much of that is used, and stops on its own at the limit, keeping what it recorded.
- **When the network is in the way.** If your office network blocks Trial Commander's file storage, files up to 10 MB still go through the app itself. A larger one is refused with a message that begins *The file was not saved*: try again in case the connection just dropped, then compress or split it, or ask your firm administrator — and, to fix it for good, ask your IT team to allow `*.r2.cloudflarestorage.com`. If a message says *we could not confirm whether the file was saved*, look at the matter's Documents list before uploading again: if the file is there, it was saved, and uploading it again would file it twice.
- **Working on one document. Preview** opens a PDF, a PNG, JPEG, GIF or WebP image, a plain-text file or a CSV beside the list, with **Download** and **Close**; Word, Excel and SVG files have no Preview and download instead. **Rename** changes the name shown (the stored file never moves), and **Delete**

removes the file permanently after you confirm. A PDF also has **Send for signature** (below). A row badged **not copied over** is a placeholder from a migration — the file itself stayed in your previous system — so it can be deleted but not renamed, moved or previewed.

- **Moving.** Drag a row onto a folder, or press **Move** on the row and pick the destination.
- **Making and unmaking folders. New folder**, **Rename folder** and **Delete folder** sit above the list. Renaming carries everything underneath it, at any depth. Deleting works only on an empty folder, and the refusal counts what is in the way — *"still holds 4 documents. Move them somewhere else first — deleting a folder never deletes what is in it."* A folder that came from the practice area's template belongs to the firm, not the matter, and the refusal says so.
- **Categories did not go away.** They are still a facet, not the hierarchy. **Show flat with categories** drops the tree and lists everything grouped by category, with each row showing the folder it lives in — which is how you answer "every order on this matter, wherever it was filed".
- **Where the firm has OneDrive on** and the matter mapped, an upload into a folder is written into that folder in the drive too. Afterwards the drive owns it: the app refuses to move that document or to rename a folder holding synced files, and names OneDrive as the place to do it. Files over 4 MB are filed here as they always were but are not mirrored.

Making, renaming, deleting and moving all need **Edit matter details** — the same permission as renaming a document. Reading the tree needs only access to the matter. A client uploading through the portal still files at the matter root; they are never asked for a folder.

Drafts that live in Word and Excel

Where the firm has connected OneDrive, a matter's Documents tab carries a **Drafts — live in Word & Excel** card. Give the **Document name** and press **W New Word draft** or **X New Excel draft**: the file is made in the matter's OneDrive **Drafts** folder, and **Open ↗** opens it in Word or Excel itself. A draft stays off the matter's record until someone presses **Finalize**, which moves it out of Drafts and files it on the matter. A matter with no OneDrive folder mapped says so on the card: new matters get one from the new-matter form (Part III), and a firm administrator maps older ones in Settings → Document Sync. A Drafting Studio **Export .docx** on a mapped matter also drops a copy into its Drafts folder; if OneDrive cannot be reached, the download still works.

Documents from the firm's templates

+ New → **Document from template** (it asks which matter first when you are not on one), or **Generate from template** → on the matter's Documents tab. The templates are listed in two groups — those matched to the matter's practice area, and generic ones for any matter. Pick one and the **Preview** fills it with the matter's, the client's, the firm's and your own details; a bracketed value such as `[matter.court]` marks a field that is empty on the record. A template that asks for details of its own shows a box for each under **Custom fields**. **Generate & Download .docx** produces the Word file; **Edit template instead** goes to the template. Anyone who can open the matter and may add documents to it

can generate — every attorney, associate, paralegal and firm admin; not a Read Only user (since 4 October 2026). Everything generated is listed on the matter's overview under **Generated Documents**, with **Download** ↓ and a **Share** button that puts it on the client's portal (it reads ✓ **Client** while shared); sharing needs Edit matter details.

The library itself is Tools → **Templates** (the **Document Templates** page), grouped by category. **New Template** takes a **Template Name** (required, up to 200 characters), an optional **Description**, a **Category** — Pleading, Motion, Notice, Letter, Agreement, Discovery, Declaration, Order, Certificate or Other — a **Practice Area** (or *Any practice area*) and the **Body**. Click any entry in the **Insert variable** panel to drop its placeholder, such as `{{matter.name}}`, at the cursor; the form counts the placeholders used. **Create Template** saves it; a template no longer wanted is archived (**Archive**), not deleted. Creating, editing and archiving templates needs **Edit matter details**.

Sending a document out for signature

Any PDF in the matter's Documents tab carries **Send for signature**. The signer gets their own private link by e-mail — the app sends it, you do not paste a URL into Outlook — and opens a page showing the PDF itself with a Download button, because a record the sender stops you printing is not enforceable against you. Above the signature box is the statement 15 U.S.C. § 7001(c) requires: the right to paper, the right to withdraw, what the consent covers, how to withdraw it, how to get a paper copy and what it costs, and what software is needed. **Only after they tick "I agree" does a signature box exist on the page** — typed, or drawn with a finger.

1 · SEND
Documents tab → **SEND FOR SIGNATURE** on the PDF. Add a second signer if two people have to sign — each gets their own link and signs independently.

2 · CONSENT
The signer reads the § 7001(c) statement and agrees. Without that, the server refuses the signature — not just the page.

3 · REMINDERS
Day 3 and day 7 if they have not signed, then silence. Each reminder retires the old link and issues a new one.

4 · FILED
A new PDF lands on the matter under **SIGNED DOCUMENTS**: the original untouched, plus a signature page.

The signature page records every signer's name, e-mail, role, the name as signed, the time in UTC and again in Eastern, the IP address, the browser, the version of the consent text and the original's SHA-256. **The original is never altered.** Cancelling cancels for everybody. The Rule 4-1.5 fee-agreement flow is untouched — this is the route for everything that is *not* a fee agreement.

WHAT THIS IS NOT

Nothing sent this way is **notarized**, and there are no **attesting witnesses** — a second signer is a second *party*. F.S. § 668.50(3)(b)1 excludes wills, codicils and testamentary trusts from Florida's UETA entirely. Identity is not verified: a single-use link to one address and a document hash is the whole of it. And the consent statement is **English only** pending a Spanish-speaking Florida attorney's read — hand a Spanish-speaking client the paper version.

The Drafting Studio, step by step

The Drafting Studio is included from the Silver plan up, and in the trial; on Starter and Bronze the sidebar shows it with **Upgrade to unlock**. Open it from Build → **Drafting Studio** on a matter, or from the sidebar and pick the matter. **Documents for** chooses the practice area whose documents are offered; choose the **Document type** (the firm's own skills are there too, below), add **Instructions (optional)**, and press **Draft**. Then check it: **Review**, **Red-team**, **Bias audit**, **Element audit**, **Cite-check**, **Verify statutes** and **Readiness**, and *Revise with AI* takes a plain instruction. Cite-check verifies case (reporter) citations once Trial Commander has connected its citation service; until then it says external citation verification isn't configured, and you check the citations by hand.

Export .docx ↓ stays off while any `[VERIFY]` or `[CITE NEEDED]` marker is left. It runs a readiness check, then asks the attorney to confirm five statements — every section reviewed, the facts checked against the record, every authority verified, responsibility taken for the work, and compliance with Fla. Bar Ethics Opinion 24-1 supervision — and records that on the matter's audit log. The Studio's own **Brief Bank** button searches the firm's earlier Studio drafts.

The Brief / Motion Bank

Brief / Motion Bank, under Library in the sidebar, is the firm's collection of filed motions, briefs, responses, orders and agreements, with their outcomes. Firm admins have it; an administrator switches it on for anyone else (*Open the Brief / Motion Bank*, under *Drafting & documents*), and new staff start without it. Its search reads the words in the title, the body and the tags. An entry is added by pasting the text, linking the filed copy, or importing a generated document in one click; adding or changing one also needs Edit matter details. An entry offers **Use as starting point** → and **Red-team this brief** ✦, records the **Outcome / ruling**, and carries the firm's annotations.

A matter's overview gathers this work in its **Knowledge & Research** card, *scoped to this matter*: the matter's Brief / Motion Bank entries (**+ Add**; without the Bank's switch the card says it is switched off for you), its hot-doc analyses (**+ Run**) and its Drafting Studio drafts with how many are filing-ready (**+ Draft**). It fills in after the rest of the page.

Your firm’s own drafting skills

The Drafting Studio has a **Your firm’s skills** page. Whoever keeps the precedent file — it is a permission, *Create firm drafting skills from the firm’s own documents*, not a role — presses **+ New skill from a document** and supplies the document this firm considers its model: an upload, pasted text, or a Brief Bank entry. One AI pass derives a draft skill: the section outline, notes on how this firm writes, the facts a drafter must have in hand, and an explicit list of what it deliberately did *not* carry over. It sits as **Awaiting review** and is offered to nobody until an **attorney** reads it and approves. Authoring can be delegated; approving cannot.

The document itself is **not stored and trains nothing**. What the record keeps is a reference — what kind of document it was, its label, a checksum and how long it was — so re-deriving means supplying the

document again. Re-deriving makes version 2, and approving version 2 withdraws version 1, so exactly one version is ever on offer; any approved skill can be withdrawn with a reason and stops being usable at once. Drafting with a firm skill runs the same path as a built-in — same entitlement, same spend cap, same matter-access check, same export acknowledgment — and produces, like every draft here, a draft for a lawyer to read.

The Library in the sidebar

- **Case-Law Annotations** is the firm's own bank of cases worth remembering. **New annotation** asks for the **Caption**, the **Citation**, the **Holding** (one to three sentences) and the **Annotation** — what the firm uses the case for — all required, plus the jurisdiction, decision date, links, tags, the **Treatment for our side** and its **Validity**. Search by words, **Tag** or **Jurisdiction**; each entry's citation opens straight into outside research. Entries are archived, never deleted, and adding or changing one needs **Edit matter details**.
- **Citation Lookup** takes a citation, a case name or a plain question and gives one-click searches on Westlaw, Lexis Advance, CourtListener and Google Scholar. Trial Commander calls none of them itself — they are search links — and Westlaw and Lexis need your own subscription.
- **FL Evidence Code** is a one-page quick reference to eighteen common sections, by topic, each linking to the statute on flsenate.gov. It is a starting point, not a substitute for research, and it says so.

Part IX · The AI, plainly explained

What it costs — and the hard ceiling

PLAN	MONTHLY AI ALLOWANCE
Bronze	None — the firm brings its own AI key
Silver	$10 per user
Gold	$20 per user
Platinum	$40 per user
Trial, or the free Starter plan	$3 a month for the whole firm

The firm's allowance is the per-user figure multiplied by the number of people on the account, pooled across the firm — not a personal wallet.

When the allowance is used up, AI **pauses**. It never bills past it. There is no surprise invoice — that is a hard ceiling, not a warning. Your firm can also lower per-feature caps under Settings → AI Limits.

On a trial or the free plan, AI can also pause because trial and free accounts together have reached this month's limit; the message says exactly that. Either way the way forward is the same: upgrade to unlock more AI, or connect the firm's own key.

When the AI cannot run

If the AI service itself cannot be reached, the screen says *AI features are temporarily unavailable — your work is saved. Please try again later.* Nothing you typed is lost. At a firm that connected its own Anthropic key, the message names the problem with that key — out of credit, not accepted, or at its rate limit — and a firm administrator fixes it under Settings → AI Limits, or disconnects the key to use the plan's included AI. When an allowance or a feature's monthly cap is used up, the message says so, says when it resets, and gives the two ways forward: an administrator can buy more AI (sales@trialcommander.com) or connect the firm's own key. The Morning Brief still shows its counts — overdue deadlines and invoices, unbilled hours, active matters — when the AI cannot write the narrative.

The strategy tools, on Platinum

The AI strategy tools come with the Platinum plan and with the trial; on other plans they show *Upgrade to Platinum for the AI strategy tools*. One of them, **Opposing Counsel Twin** on a matter's Insights menu, studies opposing counsel's own writing so you can prepare against it: give the **Opposing counsel name**, paste their prior briefs, letters or deposition questioning under **Source materials** (at least 200 characters, up to 30,000), say **What do you want the twin to produce?** — their likely motion, their answer to yours, a meet-and-confer — and press **Run twin**. The last thirty analyses on the matter stay on the page. Its **Ethics line** is the rule: the output is for your preparation and is never passed off as opposing counsel's own writing — to them, the client or the court (Rule 4-8.4(c)).

Your data

Client data is never used to train anyone's model. Your firm can require zero retention, and can connect its own Anthropic key if it prefers its own terms.

The rule that never bends

AI output is a first draft, never advice. You are responsible for every citation, every fact, and every filing — exactly as you always have been.

Part X · Closing a matter cleanly

The matter's overview carries a **Close-out** card that counts what is done from what is already on the file — nobody ticks it by hand:

1. **Engagement letter on file.**
2. **All invoices paid** — otherwise it shows the outstanding amount. Collect it, or write it off deliberately.
3. **Trust balance is zero** — otherwise it shows what is left to disburse or refund.
4. **Update client** — an outgoing communication in the last 30 days.

5. **Closing letter** sent to the client (one click from the card).

A contingency matter adds **Closing statement signed by both parties** and **Settlement disbursed from trust**. Give a **Reason** and press **Mark matter closed**, which starts the retention clock your firm configured; you can close with items still open, but they stay on the audit record. Closing needs **Close matters**, which firm admins and attorneys hold and which cannot be granted to anyone else. A closed matter is reopened from its **Edit** page → **Matter Status** → **Reopen Matter**, which attorneys and firm admins see.

Several at once is a **Close** from the matters list (Part IV), and it is stricter on purpose: a matter with money still in trust or an unpaid invoice is refused by name with the amount, while the rest go through. Those two lines are advisory on the matter's own close-out card because somebody is looking at that file and can judge; in bulk nobody is.

Part XI · Shortcuts, help & feedback

- **Search** in the sidebar spans matters, clients, documents, and communications.
- **Ctrl K** (⌘K on a Mac) — or the **Search or jump to...** box at the top of the sidebar, or the **Search...** box in a phone's top bar — jumps to any matter, client, or page from anywhere, and finds a contact by name, telephone or e-mail (Part IV, *Finding things*). It takes a question too: type one and choose **Ask Trial Commander** for an answer drawn from these manuals and your firm's own records, with the sources it used. **Q&A & Self Help** carries the same box.
- **?**, pressed anywhere outside a text box, opens **Keyboard Shortcuts**. The ones worth learning: **Ctrl K** (⌘K) for the finder; **Ctrl J** (⌘J) for Atticus AI (Part XII); **Esc** to close any panel; **Tab** in a time-entry narrative to expand a legal abbreviation (*p/c* becomes *phone call*); and **Shift+click** to tick a run of checkboxes in a list.
- **+ New** is the **+** beside the bell at the top of the sidebar. It leads with the everyday things: **Time entry**, **Task**, **Deadline**, **Hearing**, **Note**, **Contact**, **Matter**, **New inquiry**, **Phone call**, **Document from template** and, for anyone who bills, **Invoice**; the rest are under **More**. It lists only what you are able to do — if something is missing, your role or your switches do not include it (ask your administrator). Opened on a matter, each one goes straight to that matter's form. Opened anywhere else, the ones that belong to a matter (a task, a deadline, a note...) first ask *which matter?* — start typing its name or number.
- **In Word and Outlook.** If your administrator has deployed the add-ins, Word has a **Trial Commander** tab and a button on its Home tab: draft, save the open document to a matter, fill a template, insert the caption block or a citation, compare against the last saved version, cite-check, check the draft against the matter record, log time, and finalize. Outlook has **Log to Matter** and **Send to Trial Commander** beside an open email, **Attach from Matter** while you write one, and it finds the deadlines an email names. It also warns you before an email goes to an outside address that is not on the matter, or carries a privileged document — a warning, never a block.

- **Pin**, at the top of a matter (it then reads **Pinned**), keeps the matter in the sidebar's **Pinned** list and at the top of Ctrl K — up to ten, the oldest dropping off when you pin an eleventh, and the same on every device you sign in from. **Recent**, below it, lists the last seven matters you opened in this browser.
- **Settings** shows each person the cards for their role. Everyone has **Office Add-ins**, **Display**, **Profile**, **Notifications**, **Email** (it connects a mailbox only where your firm has Email on the matter, Part XV), **Calendar Sync**, **Document Sync** and **QuickBooks Sync**, and every staff member **Connect your AI**. **Team Members**, **Subscription & Billing** and **Trust Account** follow the matching permissions, and the rest — Help & Resources, Appearance, Brand & Print, Firm Policies, Scheduling, Matter Numbering, Fee Packages, Security, AI Limits and the others — are for firm administrators. A card you do not see is one your role does not use.
- **CLE Tracker**, under Compliance, is each lawyer's own record of continuing legal education. In a Florida firm, set the **Cycle start date** and press **Save period** (a three-year reporting period). Elsewhere, set your **CLE deadline** and press **Save deadline**. Add each course under **Add CLE Entry** with its hours and a certificate link, and the page totals them. Check what your cycle requires against the Bar's own rules.
- **Print summary** on any matter produces a clean one-page brief of the file — useful walking into court.
- **Q&A & Self Help** in the sidebar has the answers people actually ask, the video walkthrough (**Jump to a chapter** goes straight to one part of it), the core manuals — this guide appears there as **How-To Guides** — and **What's New**, the plain-language record of each release, newest first.
- **Firm Intranet** and **Firm Directory** are the firm's notice board and staff list. Everyone at the firm can read both; posting an announcement is the firm admin's, or someone they name.
- **Where are the firm forms? Firm Forms**, in the sidebar under Home → **More** beside the Firm Directory (or type *forms* in Search or jump to…), is where all of the firm's own documents and blank forms are stored: the trust account ACH / wiring instructions, the W-9 for the current year, the credit-card authorization, intake sheets in English and Spanish, bankruptcy applications, divorce and personal-injury questionnaires, firm memoranda. They are grouped by category, each marked English, Spanish or both, with a search box; **Download** saves a copy and **Open** shows a PDF in the browser. Everyone on staff can find and download them. Adding, replacing, renaming and deleting a firm form is the firm admin's, and anyone the admin switches on for it in Settings → Team Members (the **Firm Forms** switch). These are files the firm keeps; the questionnaires you *send* a client to fill in online are on the contact's page.
- **Getting Started** beside it is the first-week checklist, tracked against what you have actually done (Part XIV). It is also where the firm's **sample matter** is added — a practice file that follows the areas you work in: *Sample — Alvarez v. Sunshine Grocers* (a slip-and-fall) for injury practices, *Sample — In re the Marriage of Whitfield* for family law, and *Sample — Palmetto Bakehouse v. Keystone Refrigeration* (a contract dispute) for everyone else. It is badged **Sample** wherever it appears, kept out of the firm's numbers, and there so you can press every button without touching a client's file.

Anyone who can create matters can add it. Its banner — *Sample matter — delete it any time* — has **Delete sample matter** → **Yes, delete it** (or **Keep it**), for anyone who can create or delete matters.

Deciding what reaches you

Settings → **Notifications** is one page listing every notification Trial Commander can send you — around three dozen for an administrator, fewer for other roles — grouped under headings like *Deadlines and dates*, *Trust accounting*, *Your clients* and *Billing and subscription* — each with its own switch for **Bell**, **Email** and **Push**, and a plain line saying when it arrives. A dash means that kind does not use that channel at all.

- **A daily digest.** Under *Daily digest*, pick an hour in **Send at** and you get one e-mail a day listing the bell notices from the last day that did *not* already e-mail you — so nothing arrives twice. It is sent at that hour in your own timezone, which you set on the Profile page. Leave it on *No digest* and none is sent.
- **A day in trial. Mute all e-mail for 24 h** stops every e-mail for a day. The bell and your devices carry on.
- **Push has a master switch. Allow push to my devices** — with it off, nothing is pushed anywhere whatever the table says.
- **A few notices cannot be refused** and render ticked and greyed out with the reason printed beside them: for everyone, a conflict-check hit and a trust overdraft override; and, for administrators, an overdue trust reconciliation (under Rule 5-1.2(d)(1) for a Florida firm), a client portal payment that needs attention, a failed subscription payment, the firm's trial ending or ended, a change to the privacy policy, a cancelled-firm data-deletion notice, and a broken audit chain. They survive the 24-hour mute too.

The bell, at the top of the sidebar, is where the in-app notices land. Its badge counts what is unread (99+ beyond that). Open it for the thirty most recent, newest first, each labelled with its kind and level; click one to go where it points. **Mark read** / **Unread** works one at a time — and undoes a hasty **Mark all read** — ✕ dismisses one, **Show older** loads more and counts what is unread in all, and ⚙ opens Settings → Notifications. With nothing in it, it says *Nothing waiting on you. The bell is quiet.*

Nothing you already receive changed the day this shipped. A firm administrator can open your settings read-only from your member page — so "why didn't she hear about it?" is answerable — but only you can change them.

What the screen now tells you

- **“Saving…”.** A button says what it is doing while it works — *Saving…*, *Deleting…*, *Sending…* — and cannot be pressed again until it finishes, so a slow connection can no longer turn one click into two calls or two time entries. Wait for the words to change back rather than pressing again.
- **Why you can’t open something.** When the app will not open a page or a matter for you, it says *what* it was, *why* (you are not on that matter’s team, your account is limited to other practice areas, the page is for firm administrators, a permission switch is off, or your firm’s plan does not include it), and *who* can change it — your firm’s administrators, by name. Click a name to email them a request that

already says what to switch on and where. You stay inside the app; ← **Back** returns you to where you were.

- **A refusal is a sentence, not an error code.** On the phone log, communications, the lead pipeline, document templates and the SOL page, a form that cannot be saved as it stands tells you why on the same page ("Enter a one-line subject for the call"). An "Error ID" now means something really did break — report it with Feedback.
- **"✓ Saved 14:32 by *your initials*".** Where a form saves in place, the button says so — the time, and the initials of whoever saved it. If you change a field afterwards the confirmation clears, because it described what was on screen a moment ago and no longer does.
- **A What's New card** announces a release inside the app. If you would rather not see it, switch it off for good under **Settings** → **Display** → **What's New notifications**; the page stays where it is.
- **Easy mode**, under Settings → **Display**, makes the screen easier to read for you alone, in this browser: body text no smaller than 13 px, solid text and borders, no animations, underlined links and thicker focus rings. The same page shows the firm's colours and date format, which a firm administrator changes under Settings → Appearance.
- **Your dashboard is yours. ⚙ Customize dashboard widgets** at the bottom of the dashboard hides, shows and orders the Practice stats row, Agenda, Recent activity, Action Center, Morning Brief, Firm announcements (where the firm uses the Intranet), Intakes, Conflict checks and Time capture (where your firm has one-tap capture, Part XV) — for you, not for the firm. Tick the ones you want, move them with ▲ / ▼, and press **Save layout**; **Reset to default** puts everything back. Your layout follows you to every device. A widget you could not use is never offered, and hiding one never shows you anything you could not already see.
- **Results appear at the top.** What happened after you press a button — saved, refused, a warning — appears in a notice at the top centre of the page. Delete a time entry, or a note or similar item on a matter, and the notice reads *Deleted* with the item, a countdown and **Undo** for twelve seconds.
- **When you cannot get in at all.** *Your account has been disabled* means a firm administrator turned your sign-in off — ask them to turn it back on; your work is kept. *Firm account suspended* offers **Contact Support**. *Your subscription needs attention* means the firm's subscription is cancelled or has an unpaid invoice: a firm administrator can still open **Manage Billing** → to pay or resubscribe and download the firm's records (and, for a cancelled firm, its uploaded documents — each matter's and the firm's other files), everyone else asks one, and a cancelled firm's data is kept for at least 30 days. *Seat paused — Your firm is on the free plan* — means the free plan's one sign-in is someone else's: nothing of yours has been removed, and your sign-in works again when the firm chooses a paid plan.

> **NEW — THE FEEDBACK BUTTON**
> Something broken, or just awkward? Use the **Feedback** button in the bottom-right corner of any page. It goes to the people who build Trial Commander, and your firm administrator sees it too; it sends the page you were on with it — so you can report something the moment you hit it, without stopping to work out how to describe where you were. You can attach up to three screenshots or PDFs, 10 MB together.

You are told what happens to it. When your report is triaged, picked up, shipped, or declined, you get a notification in the app — and an email for the two answers that end the story, shipped and won't do. Reporting the same thing twice is fine: the second report is linked to the first rather than lost, and you are told when it lands. Nobody has to chase anyone to find out whether it was read: Trial Commander moves it and tells you, and your firm administrator can see where it stands at any time.

If the app will not load at all, `app.trialcommander.com/status` works without signing in and reports the **Application**, the **Database** and **Document storage**: ✓ *All systems operational* or ⚠ *Degraded service*.

Questions beyond your firm: hello@trialcommander.com — a person reads it.

Part XII · Working with Atticus AI

Atticus AI is the in-app assistant, and it opens as a panel beside the page. On a matter, ✦ **Atticus AI** in the matter's header, **Ctrl J** (⌘J on a Mac) or Ctrl K → *Ask Atticus AI about this matter* opens the **matter assistant**: it answers from that matter's record, keeps the conversation (**Archive** puts a finished one away), and can act through its tools. Anything that would change the record — *add a deadline*, say — is proposed first and waits for you to press **Approve** or **Reject**; while one waits, the button's dot turns amber. Anywhere else, Ctrl J opens a **firm-wide quick ask** — Florida procedure, deadlines, drafting — which is not saved and has no tools. ✕, **Esc** or a click outside the panel closes it, and a matter's `…/assistant` address is a bookmark that opens its assistant directly. In the matter assistant, Social Security, card and account numbers typed into a message are blanked out before it is sent; the quick ask does not do this, so leave them out of it.

WHAT IT DOES WELL	EXAMPLE PROMPT
Orient you	"Summarize where the Gonzalez matter stands and what's due in the next 30 days."
Pull facts	"What did opposing counsel say about mediation dates? Cite the communication."
Do chores	"Add a deadline: response to RFP due 30 days from today, high priority."
First drafts	"Draft a status update letter to the client covering the last two weeks."

Ground rules that never bend: Atticus AI sees only what you can see; anything that changes the record runs through the same permissions as your clicks; every action is audit-logged; and drafts are drafts — the lawyer signs what the lawyer has read.

> **PRACTICE TIP**
> Be specific and name the matter. "Summarize 2026-014" beats "what's going on" — the assistant is a colleague with perfect recall of the file, not a mind-reader.

Part XIII · On your phone

Install once: dashboard → Install (or the browser's "Add to Home Screen"). Full system, one tap, no app store.

Best on mobile: the Agenda, Action Center, logging a call the moment you hang up, voice memos to a matter, approving Chronicle time blocks in a coffee line, and reading anything.

Getting around on a phone: the **Search...** box in the top bar opens **Search or jump to...** (Part IV), and ☰ opens the menu, where **+ New** sits beside the bell. On a matter, tap a menu — **Plan**, **Build**, **Bill** — to open it; it spans the screen, and tapping it again or anywhere else closes it.

Notifications: enable push when prompted so deadline alerts and client messages reach you away from the desk — then open **Settings** → **Notifications** and decide, kind by kind, what reaches the bell, your inbox and your phone, what hour your daily digest arrives, and where the 24-hour e-mail mute is for a day in trial (Part XI).

Capturing time on your phone (where your firm has it — Part XV): the sidebar carries **Capture** under Time & Billing. Pick the matter, press **Start** before the call and ■ **Stop & save draft** after it, or just tap a quick entry — *0.2 · Call* — and be done. The running timer follows you across every page on a small dock, survives a reload, and shows the same number on your laptop, because it is one timer on the server and not a clock in a browser. One timer at a time: starting a second offers to stop the first and names the matter it was on. With no signal the page still opens, every tap is kept on the device with the count in plain words, and it sends itself when you reconnect.

> **EVERYTHING CAPTURED IS A DRAFT**
> A capture lands on the matter's Time page in its own **Captured** tab, marked as captured on the phone, and somebody has to press ✓ **Accept** before it can reach an invoice. It is not in the Unbilled tab and not in any work-in-progress total until then. The firm's billing increment rounds it *up*, and the entry records what was measured as well as what was recorded. Taps not yet sent do not survive signing out — drain them before you do.

Better on desktop: Drafting Studio, discovery review, billing runs — anything that deserves a big screen.

Part XIV · Your first-week checklist

> THIS LIST IS IN THE APP NOW
>
> **Getting Started** in the sidebar carries the same checklist and ticks it off your own work — a matter you are on, a conflict check you ran, a time entry, a document, a portal message. Each step says why it matters, links to the page it happens on, and carries two **Show me** buttons: ▶ **Watch how** plays that step's own short clip, or the walkthrough at the chapter that covers it, in the app's own player (**Chapters** lists **From the beginning** and each chapter), and 📘 **Read the manual** opens this guide at the matching page. If you dismissed the dashboard card, **Show on my dashboard again** on Getting Started — or **Put the card back on my dashboard** on Q&A & Self Help — brings it back. The one step no query can honestly answer — reading the chapter for your role — says so, and **Mark done** is there for it. Work you do on the sample matter never closes a step; practising is not starting. Keep the written list below as the reference.

1. **Day 1** — sign in, install on your phone, watch the video walkthrough in Q&A & Self Help, skim Parts I–III.
2. **Day 1** — run one conflict check end to end (Part II) before you do anything else. It is the first step of every intake now, and the one worth being fluent in.
3. **Day 1–2** — open (or get assigned to) your matters; read each matter page top to bottom once so you know what lives where, and check the parties list is complete.
4. **Every day from day 1** — log time as you work and log every call. These two habits carry everything else.
5. **Day 2** — open **SOL Watch** and look at the second number, the matters with no bar date docketed. Fix the ones that are yours.
6. **Day 3** — send your first client portal invite; watch how messages and shared documents flow.
7. **Day 4** — try Atticus AI on a real question about a real matter (Part XII), and generate a Morning Brief.
8. **Day 5** — if your plan includes the Drafting Studio, draft something in it and run cite-check (Part VIII); once a brief or motion is filed, add the filed version to the **Brief / Motion Bank** by pasting or linking it — if you have the switch. Open a draft invoice and shape it before it goes out (Part VI).
9. **End of week** — Action Center at zero, Agenda reviewed, all time logged, and your dashboard set up the way you want it. That's the operating rhythm; Part IV keeps it.

Part XV · Available by arrangement

Six capabilities are built and switched on for one firm at a time, by us, rather than bought from the price list. If your firm does not have one you will see nothing of it at all — no locked card, no upsell. Ask your firm administrator, or write to hello@trialcommander.com.

Taking the trial to court on an iPad

Where it is switched on, Trial Mode carries a **Take this matter to court** card. **Download for trial** stores this matter's caption, witness queue, exhibits and their files, and the proof checklist on the device, with a progress bar and the total size; a 250 MB budget applies and anything left behind is *named* under *Not downloaded*. **Open offline console** → then works with no signal at all, stamped with exactly when it was downloaded.

1 · THE NIGHT BEFORE
Download for trial — not the week before; browsers evict storage they have not seen used.

2 · AT COUNSEL TABLE
Press **CALLED** on a witness, **ADMIT** on an exhibit, or tick a proof element. The screen moves at once and a badge counts what is waiting.

3 · BACK IN RANGE
SYNC replays every mark in the order the device made them.

4 · NEEDS REVIEW
Anything changed in two places at once, or refused, comes back with both versions side by side. Nothing is thrown away.

5 · HANDING THE DEVICE ON
WIPE TRIAL CACHE. Signing in or out wipes it too.

Only those three marks can be made offline. Adding a witness, editing an exhibit or writing a trial-log entry waits for signal — marking what happened is the courtroom act; composing is not. Billing, time, trust, client messages, deadlines, notes and the rest of the document library are never stored on the device.

The other five

CAPABILITY	WHAT IT DOES FOR YOU
Email on the matter	You connect your *own* Microsoft 365 mailbox once at **Settings** → **Email**. Threads with a matter's contacts then turn up on that matter with their attachments already in its documents, and you can reply from the matter — sending from your own Outlook. **Not this one** takes a thread off a matter for good, a private **Unfiled email** list holds what matched nothing, and a **Never file** list keeps personal addresses and whole domains out entirely. Nobody's mail is read but their own, and disconnecting never un-files anything.
Client payments in the portal	A **Pay now** button beside an unpaid invoice, and — where a signed fee agreement names a retainer — a **Deposit a Retainer** card. Card details only ever go to Stripe's own page. Every cent of a retainer is credited to trust *gross*: the client is told in their own language that the processing fee is the firm's to bear.
Migration from Clio	One archive instead of seven renamed spreadsheets, with a mapping preview, a dry run that names every record the firm already has, and forty-eight hours in which the whole run can be rolled back. The per-file Clio uploader is there for every firm today.
One-tap time capture	A timer and quick-entry buttons on the phone (Part XIII). Everything it records is a *draft* somebody accepts before it can be billed. It waits on your firm choosing two things at Settings → **Firm Policies** — its billing increment, and which quick entries become buttons — because rounding up is a billing judgement (under Rule 4-1.5(a), for a Florida firm) and not one the software should make for a firm that has not looked at it.
External collaborator seats	A login for co-counsel or an expert that reaches exactly one matter, with the firm administrator deciding switch by switch what they see. Every document they open is logged. The first seat is free; each one after it is $9.95 per seat per month, and the address must be outside the firm's own mail domain.

The Library · The Trial Commander volumes

Five companion volumes plus the practice manuals, each with one job. The five are in the app under **Q&A & Self Help** — this one as **How-To Guides (PDF)**, and the Administrator's Manual for firm admins only — each card opening the PDF and offering **Download as Word**, an editable copy a firm can adapt for its own onboarding; administrators also find them under Settings → Help & Resources. The practice manuals have their own **Practice-area manuals** card on Q&A & Self Help — one link per area with a *docx* link beside it, the areas of the matters you can open first — and **Ask Trial Commander** (Part XI) answers from them too, and each source it cites opens that manual.

VOLUME	FOR	WHAT IT EXPLAINS
Field Guide	Every user	How to use the system, in the order you'll actually do it: sign-up, opening matters properly, the daily rhythm and matter teams, clients & portal, billing & trust, deadlines, documents, and the AI tools.
Administrator's Manual	Firm admins	The controls only an admin holds: people and roles, individual permission grants, matter access, plans and add-ons, AI budgets and retention, external-access (MCP) switches, compliance gates, the feedback record (read-only; Trial Commander sets each status), and the staff lifecycle.
Technical Manual	Users, admins & IT reviewers	How the system is built and secured: architecture, where data lives, encryption, firm isolation, how the AI handles data, integrations (daemon, phone, add-in), backups, and a due-diligence FAQ.
Features Manual	New users & evaluators	Every major capability shown on real screens — what each feature does, where it lives, and a concrete example of using it.
Process & Procedures Manual	The whole firm	The firm's standard operating procedures performed in Trial Commander — numbered SOPs from intake to close-out and staff lifecycle, each with steps, a worked example, and a flowchart.
Practice Manuals (18)	Attorneys & paralegals	One per Florida practice area: the hub, the clocks, the tools, the drafting set, and the traps that area actually produces.