MyLegalSoft – Document Tracking

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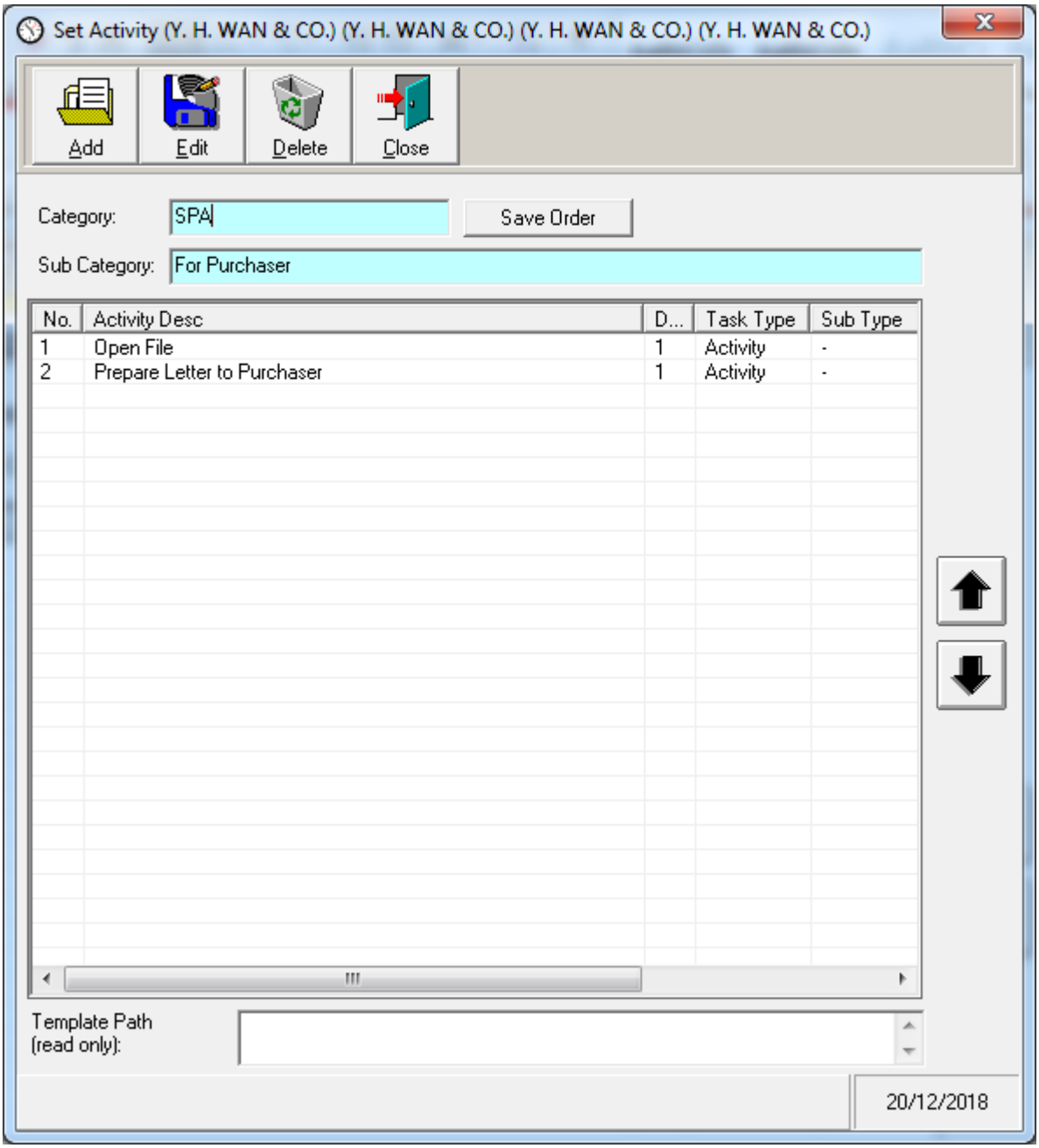
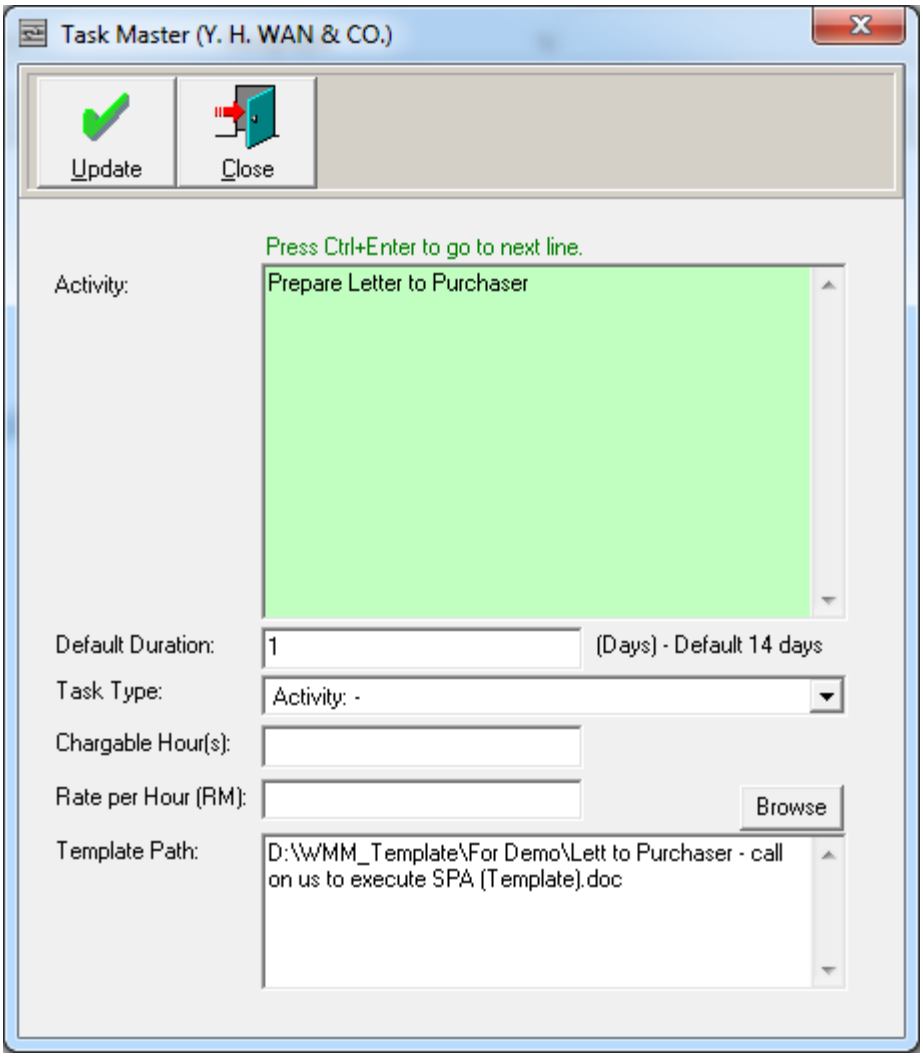
1. Pre-requisite for Doc Tracking Feature

- To enable document tracking purpose, a file must have a lawyer and a staff incharge.

2. Set Template from Configure Task

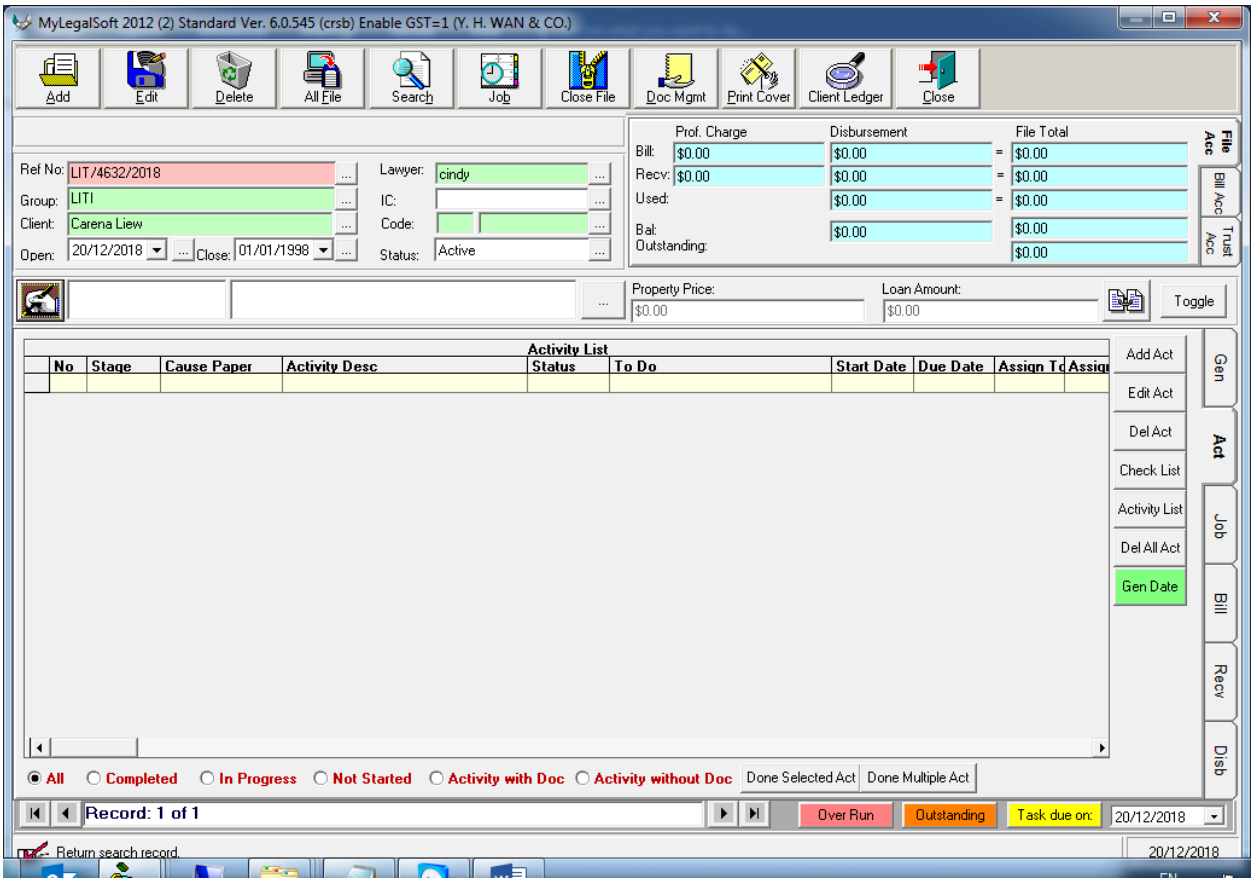


- For example, in SPA-For Purchaser sub-category, we have 2 activities. First activity is to open file and the second is to prepare letter to purchaser. We can link the second activity with the Letter to Purchaser Template so that staff later can merge the template without the need to choose the template.

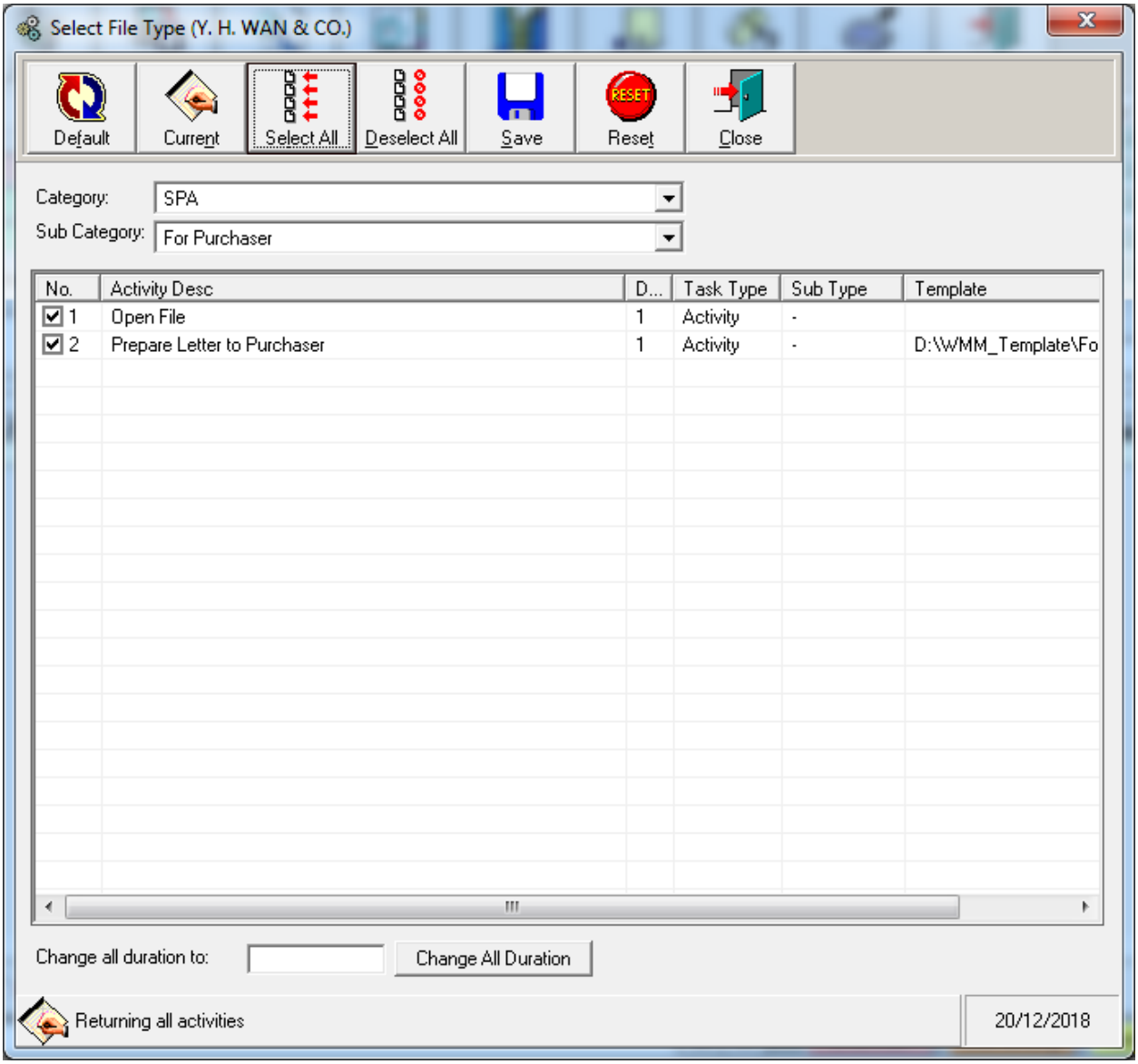


- Letter to Purchase template can be linked to this activity by pressing the “Browse” button.
- After selecting the template, the template path will auto appear. Press “Update” button on top to save the setting

3. Apply Standard Activity to a New Client File



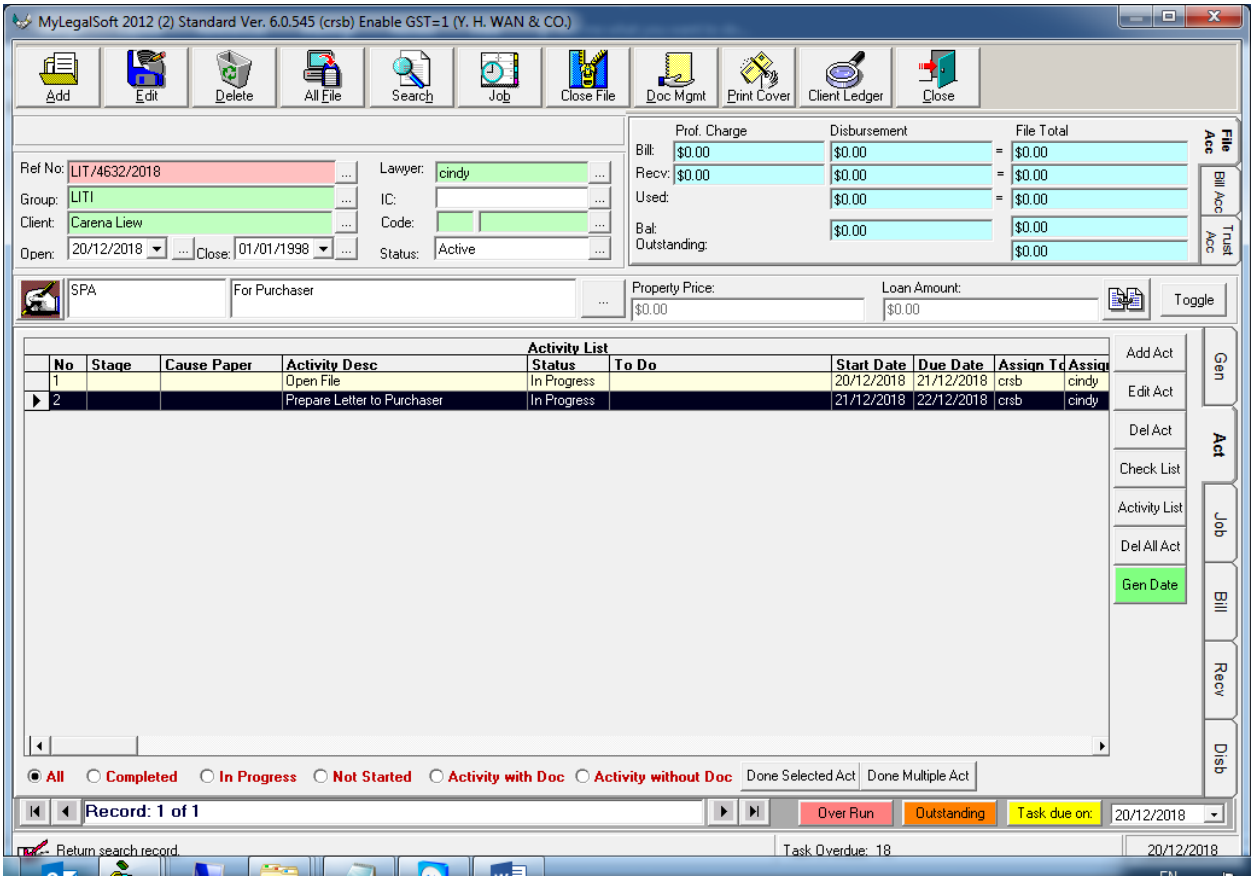
- Assuming this is newly created client file. And the standard activity is “SPA-For Puchaser”
- We can set the standard activity by pressing the “Hand” icon on the left middle side of the form.



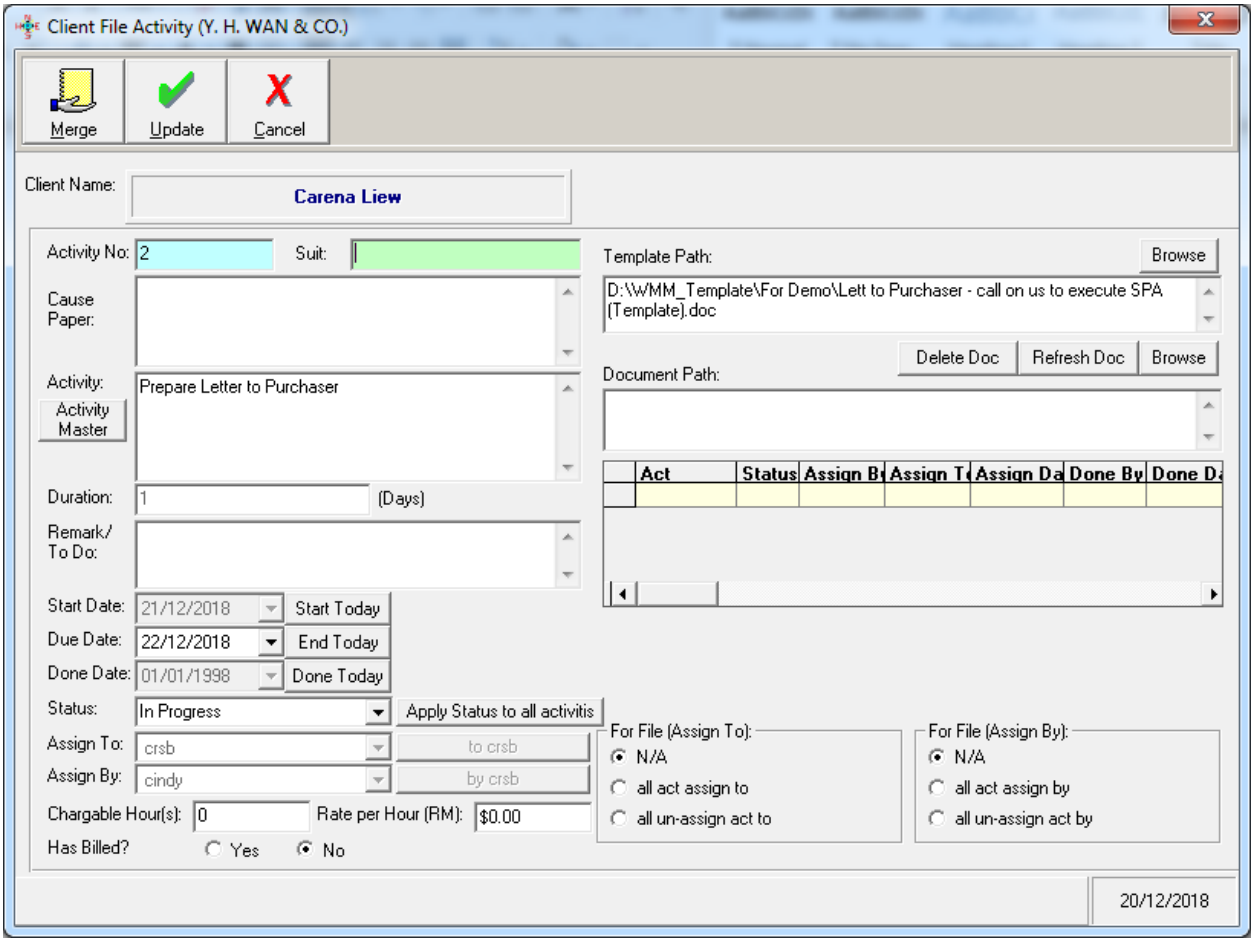
- Select the respective Category, Sub-Category, system will list down all the standard activity. In this case, there are two standard activities.
- You may be able to see the template path for the second activity.
- Press “Select All” on top of the form to select both activities and press “Save” button to save the setting.

4. Direct Merge Document

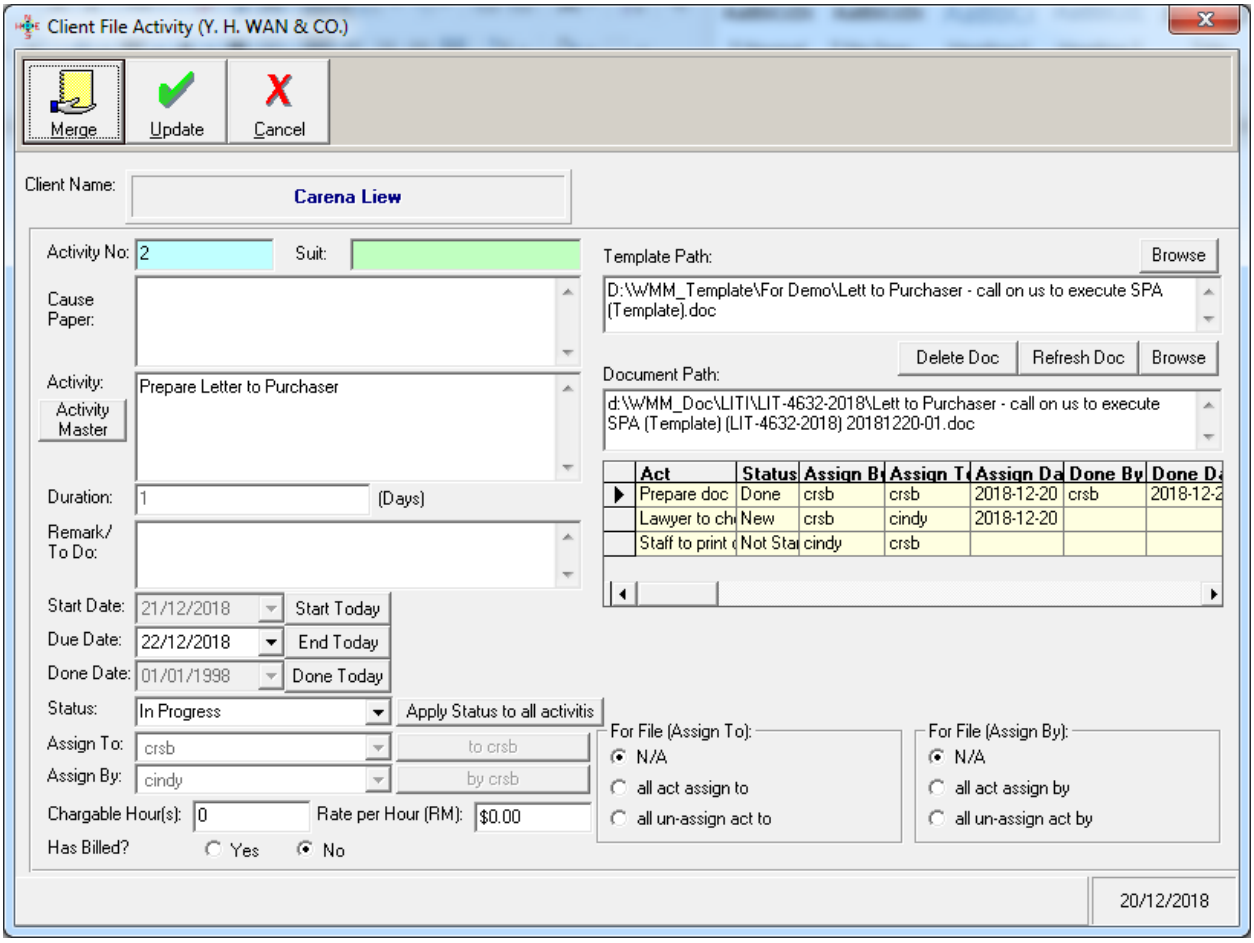
For the second activity, since the template is set, user can directly merge the document.

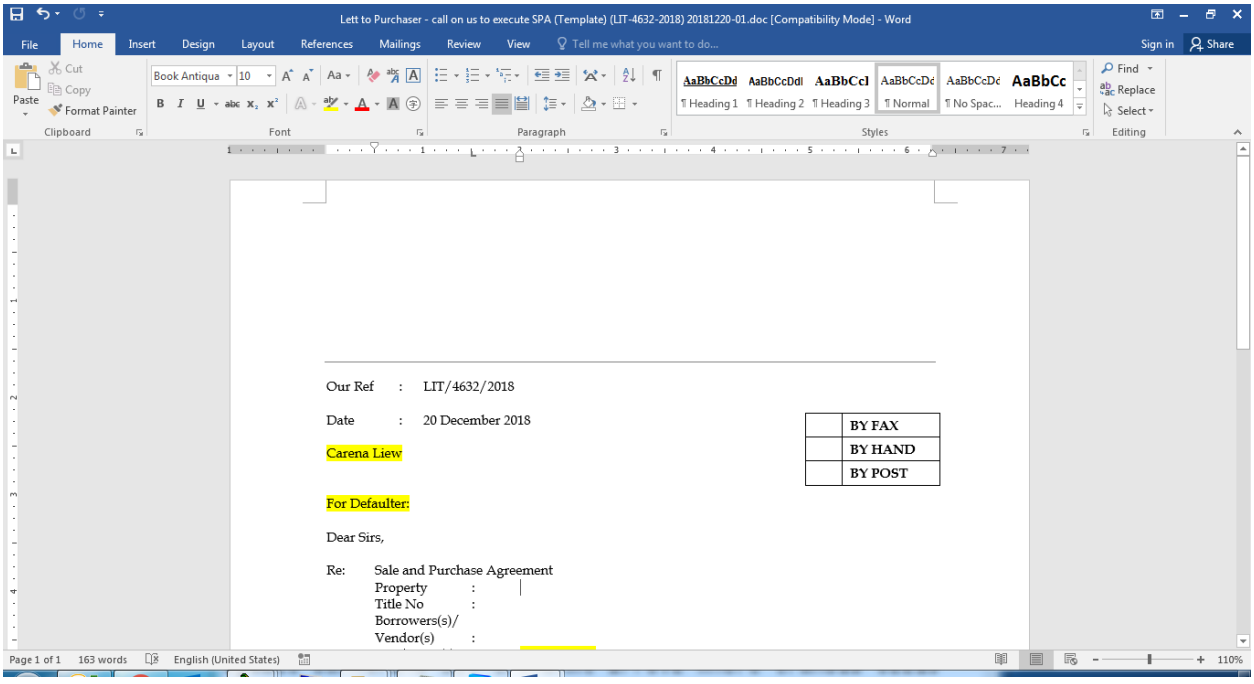


- Highlight the second activity and press “Edit Act” button.



- Press “Merge” button on top to directly merge the letter.





- After merging, the letter will auto appear for further checking and editing purpose.

5. Document Tracking (Paperless)

For every document merge directly using this method, system will auto create 3 tracking steps:

This document tracking method is meant to reduce printing on draft copy of the said document. Lawyer is expected to check the document online after staff has prepared the document.

Step 1: Prepare doc (assign by staff-in-charge to staff-in-charge)

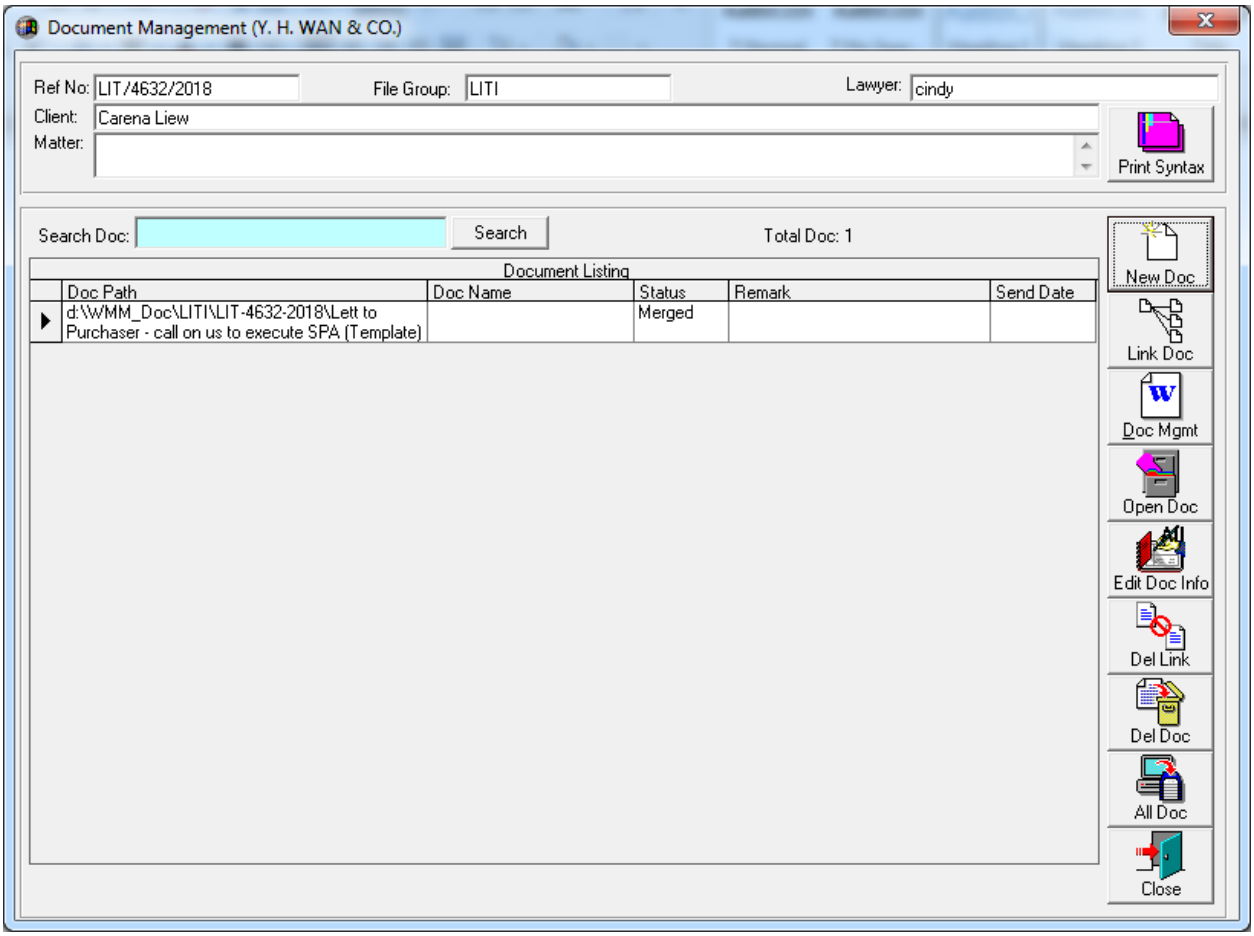
Step 2: Lawyer to check doc (assign by staff-in-charge to lawyer-in-charge)

Step 3: Staff to print doc (assign by lawyer-in-charge to staff-in-charge)

Step 1: Prepare Doc

As soon as a document is merged, the Step 1 status will be updated to “Done”.

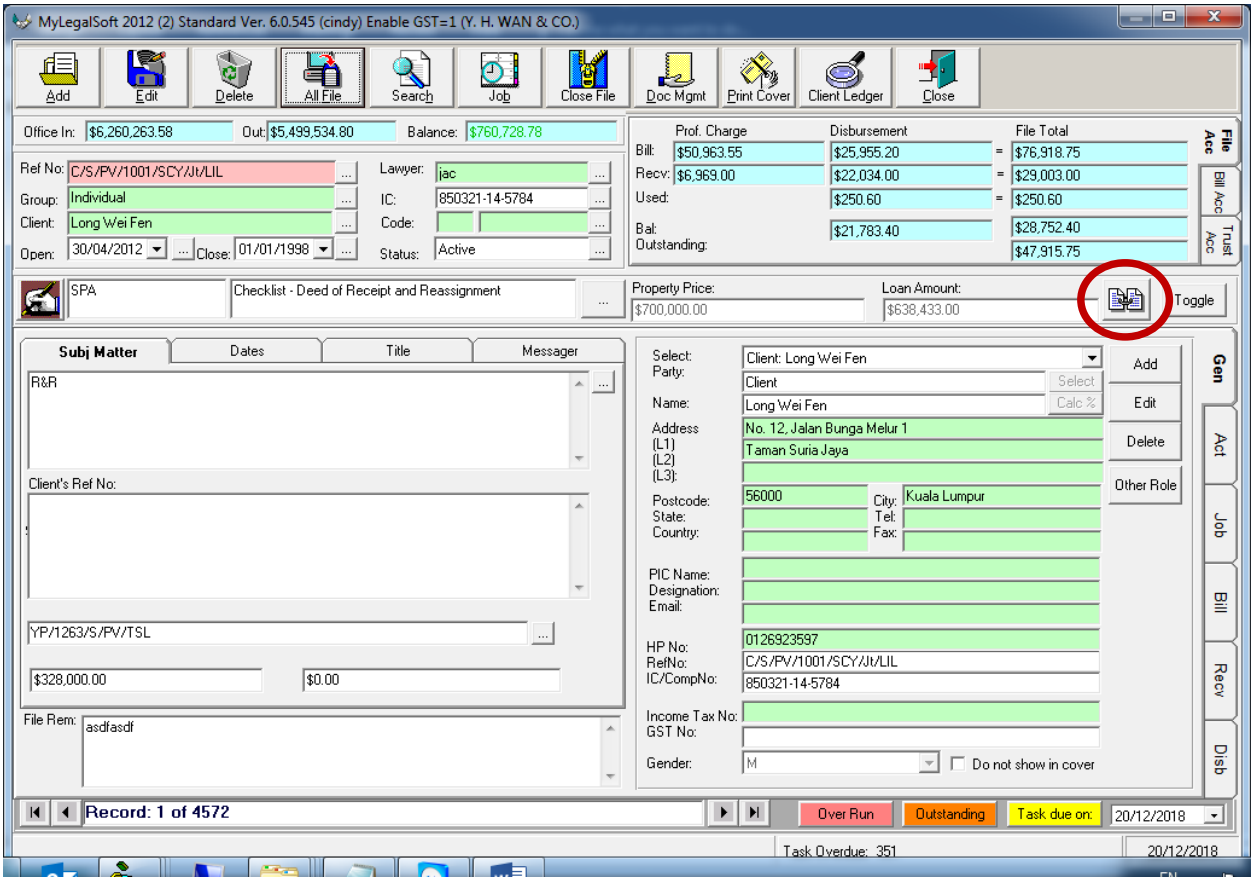
User can click the “Document Management” button to retrieve the document at later stage.

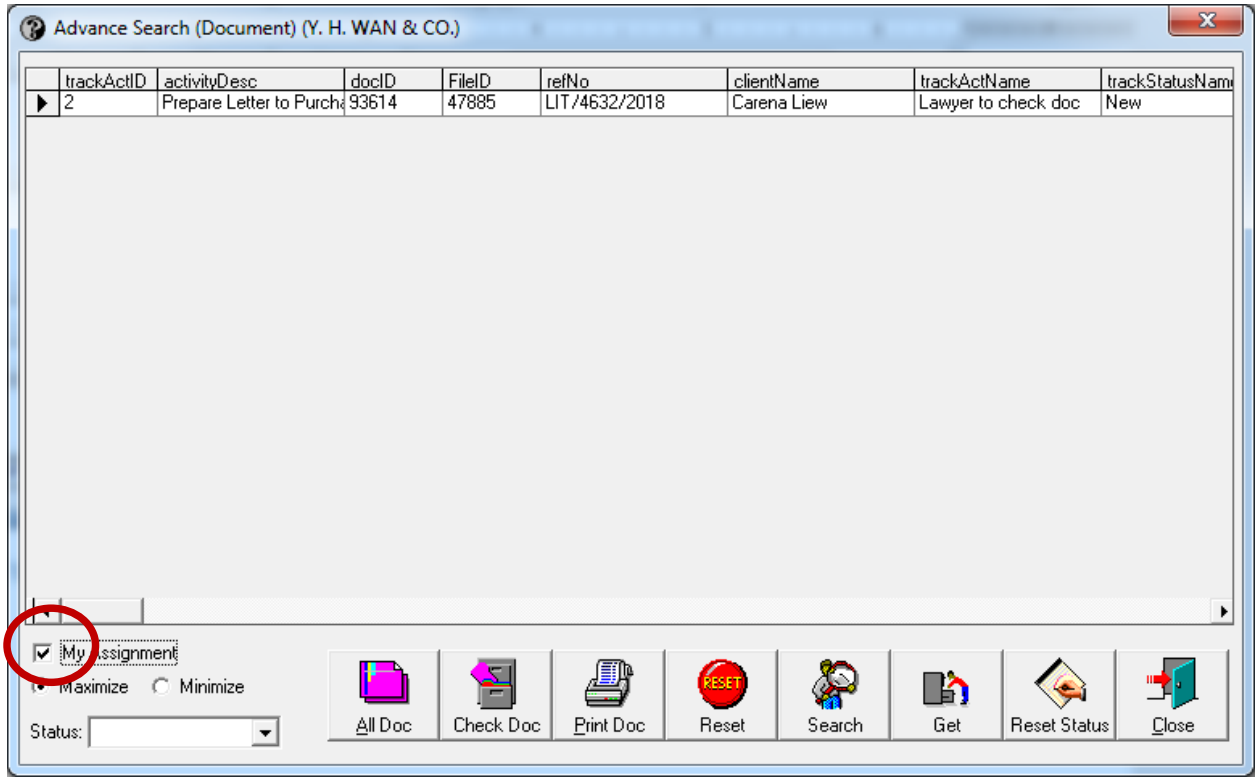


Step 2: Lawyer to Check Doc

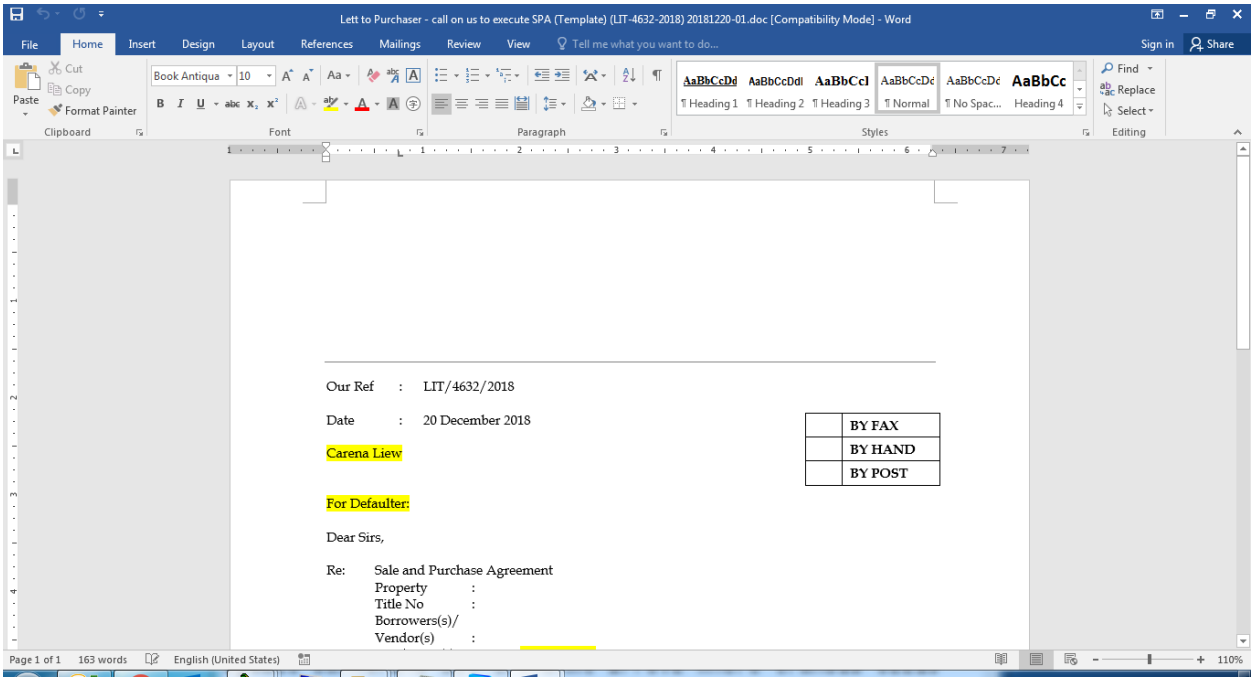
The following screen capture are using lawyer's login. In this case, lawyer is 'Cindy'. The following screen capture are using lawyer's login. In this case, lawyer is 'Cindy'

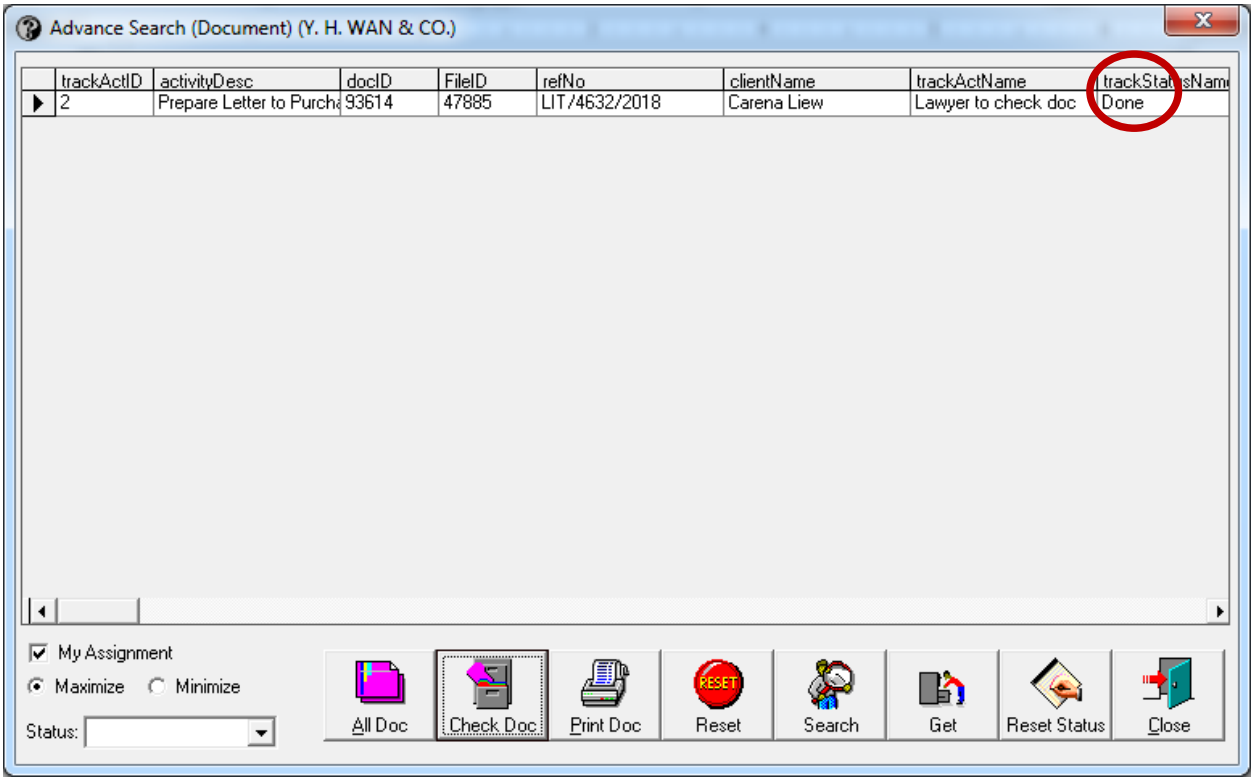
For a lawyer to check a list of document which his/her staffs already prepare, lawyer can click the "Doc-Link" button to view them.



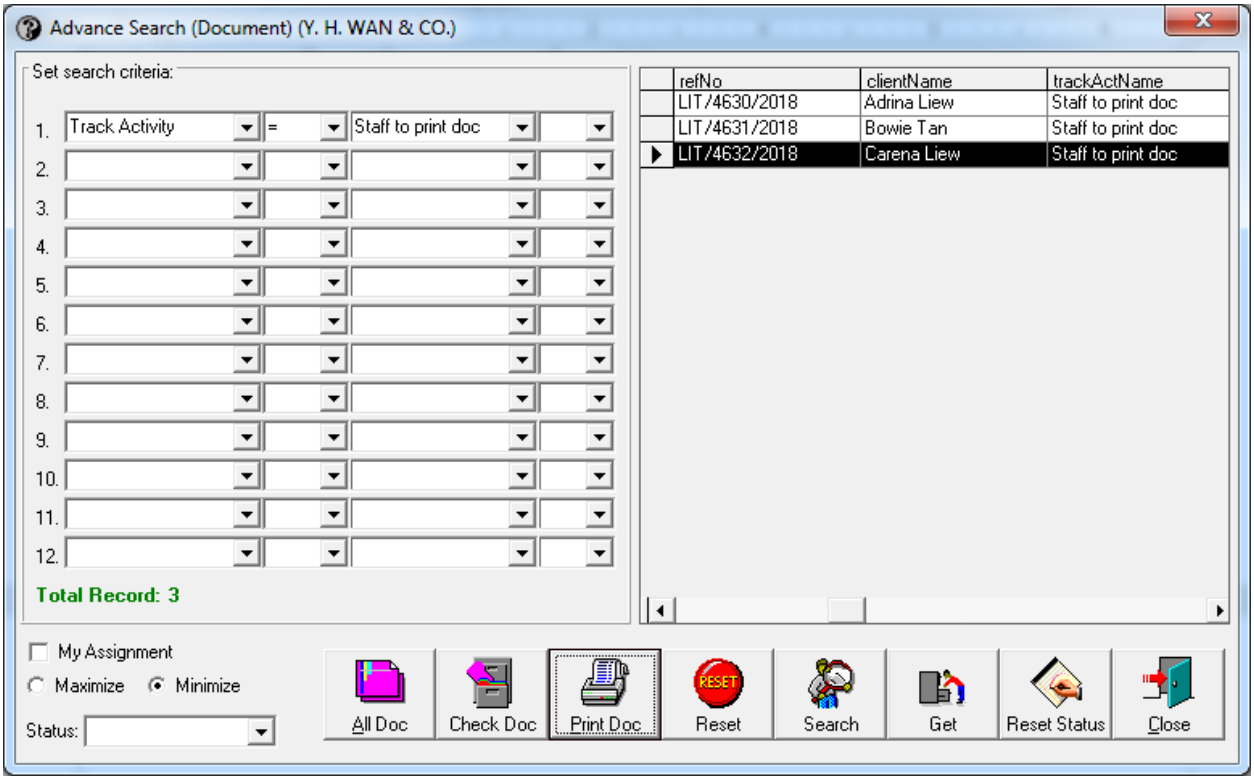


- Form above will appear. Lawyer can click “My Assignment” to auto filter all document he/she need to check.
- Highlight the wanted document and Press “Check Doc” button to view the document online.
- After pressing “Check Doc” document, system will open up the word document and lawyer is expected to check the document online.

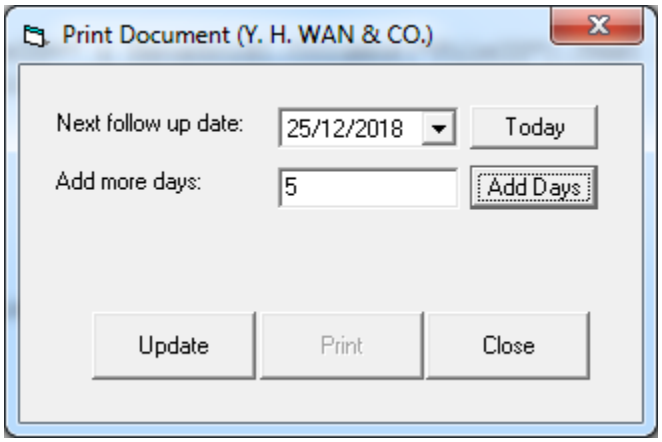




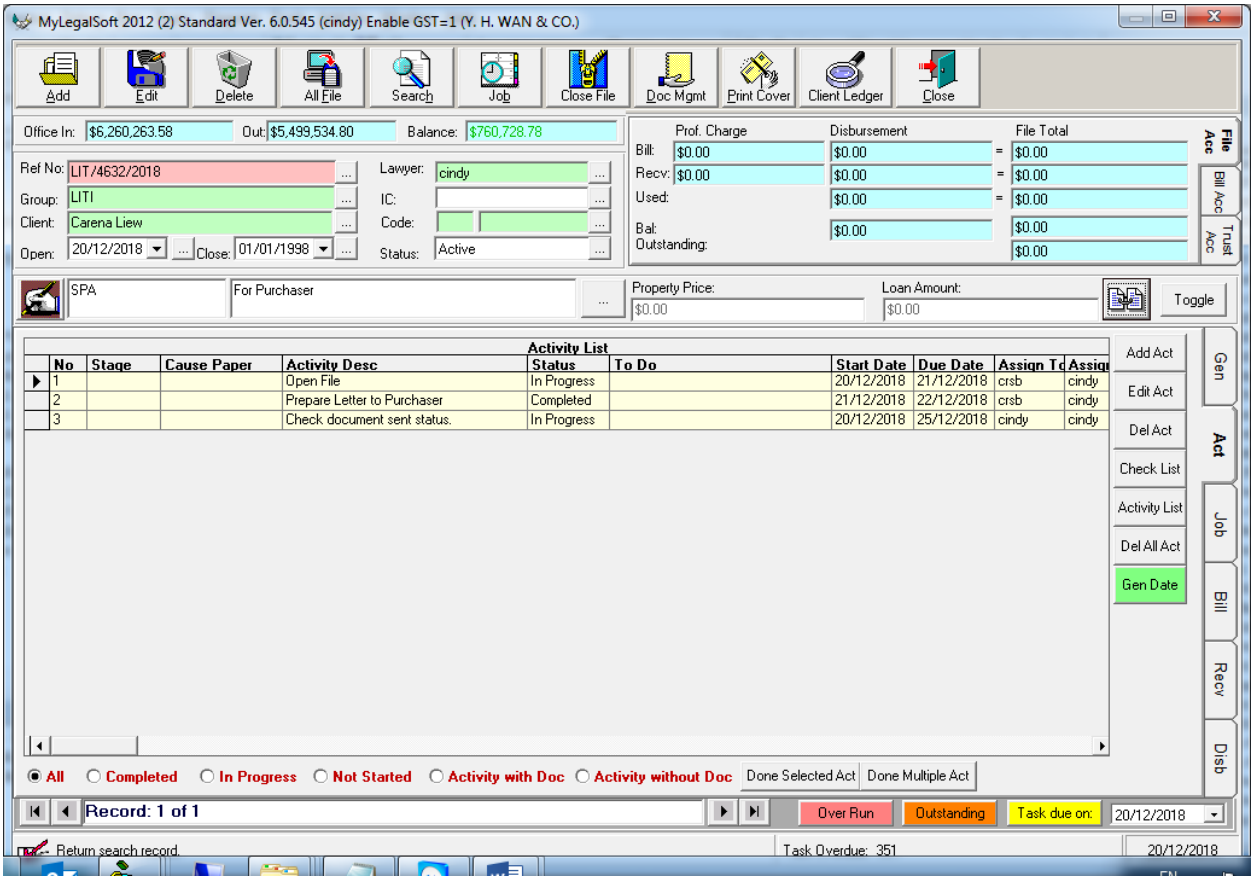
- After that, Step 2 status will auto update to “Done”.



- Next, Lawyer is supposed to set a follow update date to check the document sent out status before staff can print the document.
- Set the above filtering criteria, highlight the Staff to print doc step and press “Print Doc” button.



- Form above will appear. Lawyer can set a follow up date by pressing “**Today**” button. And in case lawyer wanted to re-schedule another date (e.g. five days later) to re-check the document, lawyer can key in ‘5’ in **Add more days** column and press “**Add Days**” button.
- Last, press “**Update**” button to save the setting.

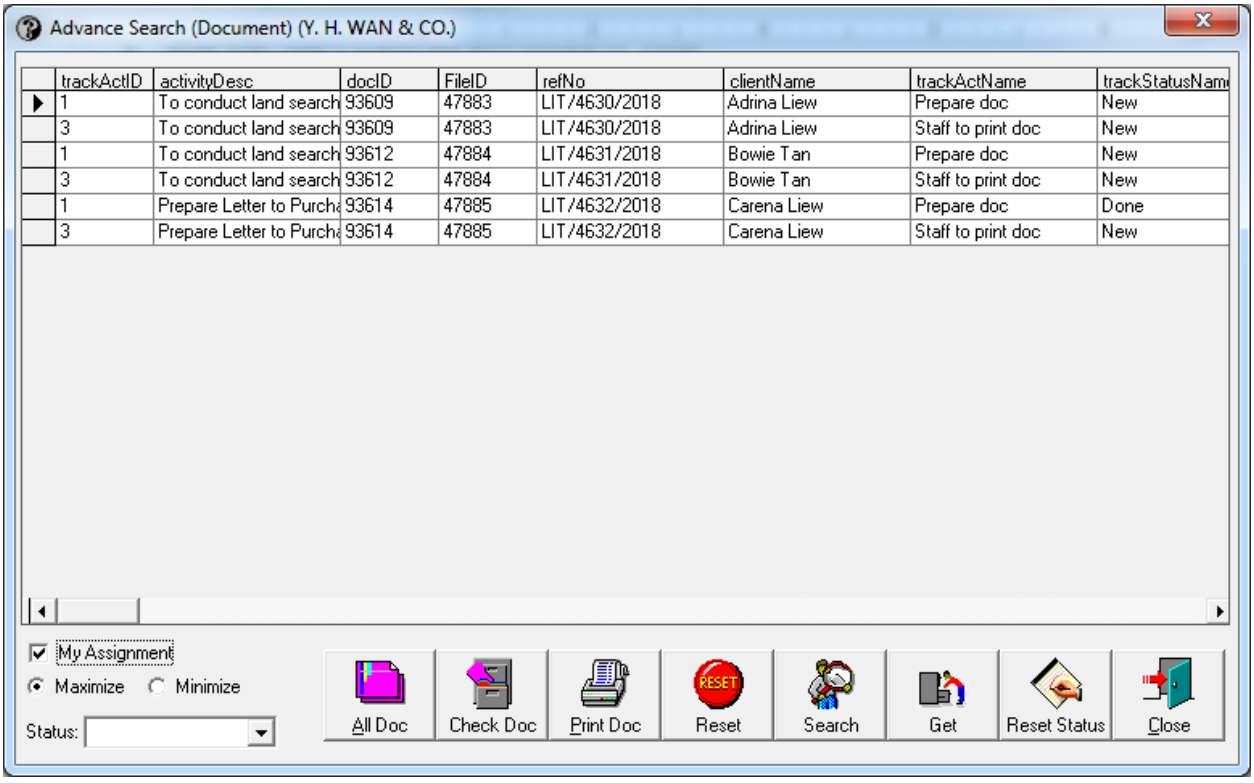


- With this setting, system will insert a reminder in the activity list to remind lawyer to re-visit the document after five days.

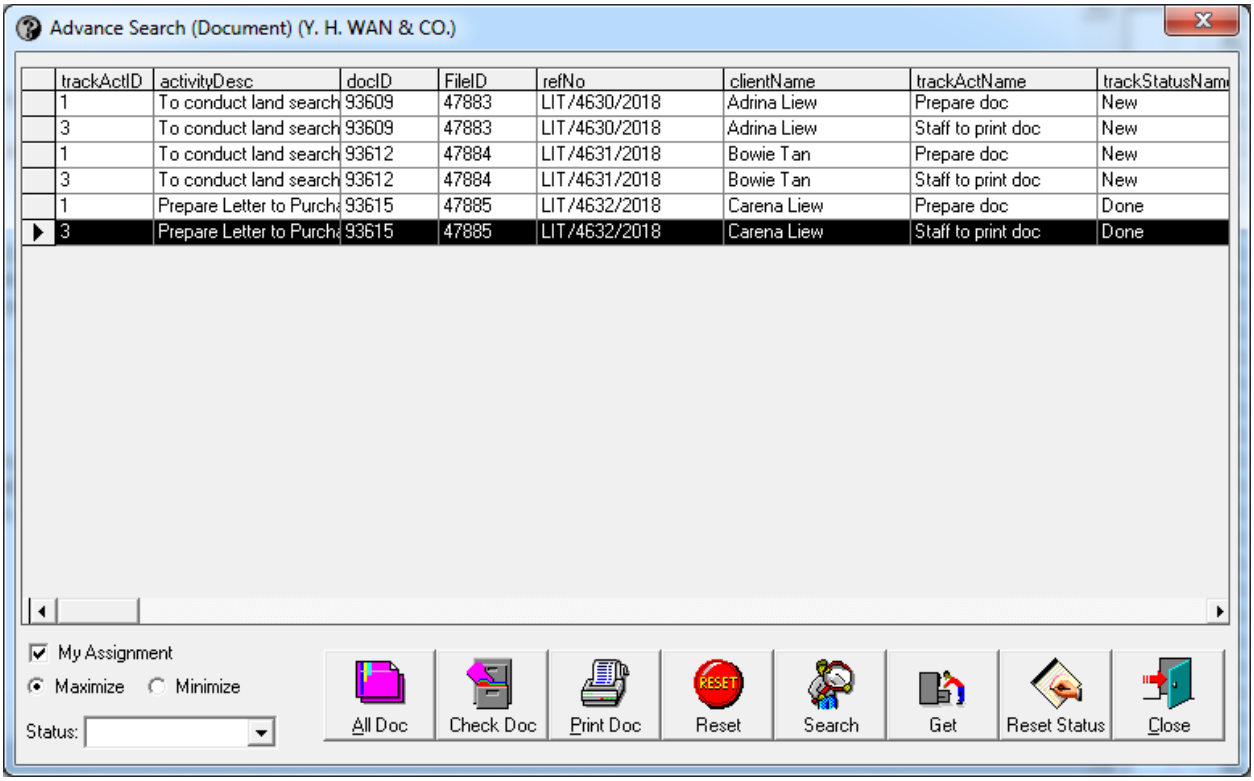
Step 3: Staff to Print Doc

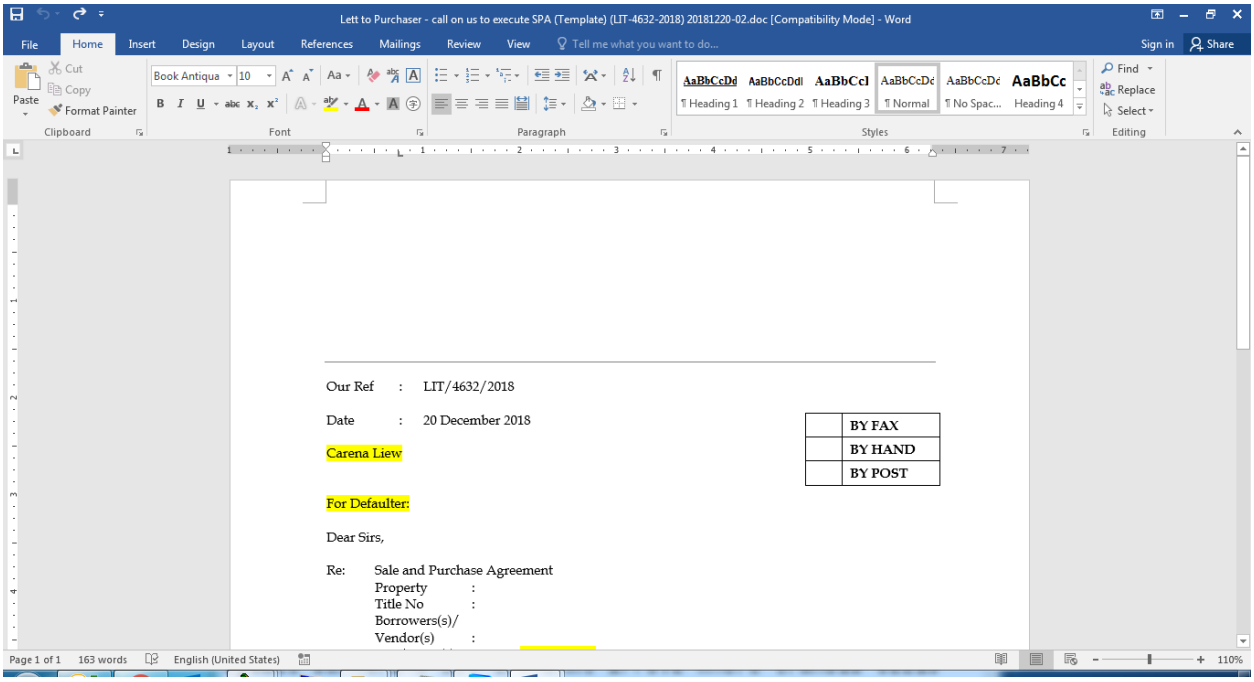
The following screen capture are using staff's login. In this case, lawyer is 'crsb'.

After user login, click the "Link-Doc" icon and check the "My Assighment".



- From this interface, staff 'crsb' will see all her assignment. Take note that for client file "Carena Liew". There are two tracking activities assign to 'crsb' namely Step 1: Prepare doc (which the status is 'Done') and Step 3: Staff to print doc (the status is 'New').
- Staff can highlight the Step 3 activity and click "Print Doc" to print the document after lawyer in charge done the **Step 2: Lawyer to Check Doc.**


Advance Search (Document) (Y. H. WAN & CO.)
trackActID | activityDesc | docID | FileID | refNo | clientName | trackActName | trackStatusNam
1 | To conduct land search | 93609 | 47883 | LIT/4630/2018 | Adrina Liew | Prepare doc | New
3 | To conduct land search | 93609 | 47883 | LIT/4630/2018 | Adrina Liew | Staff to print doc | New
1 | To conduct land search | 93612 | 47884 | LIT/4631/2018 | Bowie Tan | Prepare doc | New
3 | To conduct land search | 93612 | 47884 | LIT/4631/2018 | Bowie Tan | Staff to print doc | New
1 | Prepare Letter to Purcha | 93615 | 47885 | LIT/4632/2018 | Carena Liew | Prepare doc | Done
3 | Prepare Letter to Purcha | 93615 | 47885 | LIT/4632/2018 | Carena Liew | Staff to print doc | Done
My Assignment
Maximize
Minimize
Status:
All Doc
Check Doc
Print Doc
Reset
Search
Get
Reset Status
Close


Lett to Purchaser - call on us to execute SPA (Template) (LIT-4632-2018) 20181220-02.doc [Compatibility Mode] - Word
Our Ref : LIT/4632/2018
Date : 20 December 2018
Carena Liew
BY FAX
BY HAND
BY POST
For Defaulter:
Dear Sirs,
Re: Sale and Purchase Agreement
Property :
Title No :
Borrowers(s)/
Vendor(s) :