Technology Tips for Working ‘Safe at Home’

with Jodi Martin

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Communication

Phones

VOIP
- Freedom Voice
- Ring Central
- Google Voice

1) moves easily
2) devices included
3) apps
4) call options
5) Port your #
6) Caller ID is from #
7) automated answering
8) fax service
9) Etc.

Call Forwarding
Remote Receptionist
Remote Receptionist

Ruby
Answer All

Ruby

- Call rings there
- They can transfer to any user at designated location
  - Office phone
  - Cell phone
  - Home phone
- Voice mails sent to email

- App options
- Chat feature
- Call back service

* CBA perk
Online Meetings

- Zoom
- Ring Central
- Skype

Zoom

- phone or computer audio
- screen share
- share devices - iPad
- white board
- virtual backgrounds
- recording
- mute
- App
- Scheduling

- Look at Pro subscription so you have more tools & no time limits

- Send links to help w/ security
Security Concerns

- use passwords
- use waiting room
- Don’t use Personal Meeting ID
- Disable options
  - join before host
  - participant screen sharing
- lock the meeting
- mute participants
Do not use

Best option to help with connection issues

Puts link in your calendar

Security

Enable Waiting Room
Enable join before host
Mute participants on entry
Only authenticated users can join: Sign in to Zoom
Automatically record meeting

Alternative Hosts:
Example: john@company.com; peter@school.edu
Copy & then paste in email to client or in app calendar.

You want them to have link.
In meeting screen

- Yes
- Maybe
- Depends

Advanced Sharing Options...

- How many participants can share at the same time?
  - One participant can share at a time
  - Multiple participants can share simultaneously (dual monitors recommended)

- Who can share?
  - Only Host
  - All Participants

- Who can start sharing when someone else is sharing?
  - Only Host
  - All Participants
Bottom of Participants Panel

- Mute Participants on Entry
- Allow Participants to Unmute Themselves
- Play Enter/Exit Chime
- Allow Participants to Rename Themselves
- Lock Meeting
- Lower All Hands
- Enable Waiting Room

*Depends*
Chat options

Slack
- messaging app used by businesses
- create projects
  # general - notes
  # Doe Estate
Reduce Paper!!

Online Payments

Bank option
Case Mgmt. Options
Lawpay

Lawpay
- share link
- website link
- take phone payments
- use card or e-check
- operating & COLTAF
- fees out of operating

# CBA perk

Bank Mobile Apps
- electronic deposits
File Management

Document Management

Google Drive
One Drive
Box
Sync.com

Google Drive:
  - sync files
  - restore
  - Apps
  - limit access
  - share folders
  - client uploads
Tip - Finalize letters without ever printing

Attach your signature in digital form

- Word option:
  1) scan in signature
  2) insert into letter as image
  3) crop image and save image for future use

- Adobe - insert same saved picture

- Mac Preview
  1) sign paper
  2) Capture using webcam in App
Case Management

- Clio
- Rocket Matter
- Others

* CBA perk *

Rocket Matter:
1) Contacts (conflict check)
2) Case mgmt
   - Billing
   - Invoices
   - Payment
   - Document storage
   - Sync emails
   - Calendaring
   - App

www.lawyerist.com/reviews/law-practice-management-software.com
**Notes**

Rocket Book
writing pad
Ipad

Ipad Apps
- Notability
  - upload to Google Drive
  - email to people
  - share on Zoom or other devices
  - App on laptop syncs

- I use an Apple Pencil
- can sign docs in the App

(File example)
Client Signatures

- Notability - in person
- Docu Sign
- Adobe
MARTIN LAW OFFICE LLC
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FEE AGREEMENT

__________________________________________
Signature: John Doe
John Doe
1234 Pearl Street
Boulder, CO 80302
johnd@gmail.com
303-123-4567

Date: Apr 7, 2020

For the Firm:

__________________________________________
Jodi S. Martin, Atty. Lic. # 44658
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Date: Apr 7, 2020
Fee Agreement

Final Audit Report

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File Management Summary

- Work flow for new client

1) Call / Zoom
2) Notes in Notability
3) Email notes to asst. to open new file (Rocket Matter, Google, create opening letter)
4) I revise & approve letter
5) She issues letter by email w/ digital signature
   - save signed doc to system w/ date in file name
Key Tools

- Scanner
  - ScanSnap by Fujitsu

- Scanner App
  - Scannable by Evernote

- Faxes
  - Online Faxing
    - VOIP providers
    - MetroFax

- Password Keeper
  - 1Password

- Software Subscriptions
  - Office 365
  - Adobe DC
Other Services

Depositions
   - Esquire Solutions

Mediation
   - Zoom platform

Recording
   - Simplifile

Postage
   - Stamps.com

Remote Notaries
Discounts

Rocket Matter - 90 days Free

More:

Also:

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