



## CLIENT ACCESS – LOGIN MODULE

The Client Access – Login Module provides your Client access to case files that are assigned to their list of custids only. The Client will be able to review the case information, run a limited number of reports, along with performing some basic functionalities listed below.

- Login and lookup case files by any of the following parameters:
  - Debtor’s last name
  - Client account number
  - Forwarder account number
  - Q-Law ourfile number
- Review all file detail in the Workscreen for that file. The cases are locked which allows the Client very limited functionality. They are only permitted to:
  - Send a LanEmail to the user desk of that case file
- Client will be able to run the following reports:
  - Acknowledgements for a selected date range
  - Case status list for open active case files
  - Case status list of claims closed in a selected date range
  - Payment and remittance transaction lists for selected date range. The list includes:
    - Payments, NSF payments, Reversals, and Cost Disbursements #17

### SETTING UP CLIENT FOR CLIENT ACCESS – LOGIN

To set up your Client with Client Access – Login information, you will need to follow the steps below.

1. Click [**Maintenance**] on the main Workscreen.
2. Choose the *System maintenance – Admin* tab.
3. Click [**Users**].

**NOTE:** The Client will use a user account when logged into Q-Law which may require you to purchase an additional license.



4. Click **[Add new]**.
5. Enter the Login Name, up to 9 characters.
6. Enter a User login password for the client to use to login to Q-Law. It will automatically default to the Login Name.
7. Enter an Access Level of 10. This level is for Client Access only which does limit what they can see and do in Q-Law.
8. Enter the User initials of the client, i.e., BB.
9. The system will auto assign a Default desk.
10. Enter full name of client in the Full name field i.e., BUSTER BROWN.
11. Move cursor to the Client login field which appears after you enter an Access level of 10. This field is where you will type the string to allow the Client to review cases for their client code(s) (custids) only.

**NOTE:** The list of client codes determines the case files that are accessible to the Client.

- a. If you are setting up the Client to access only one (1) client code, enter the following i.e.:  
inlist(custid, "CHURCH").
- b. If you are setting up the Client to access two (2) client codes or more, enter the following i.e.: inlist(custid, "CHURCH","CHURCY","CHURC1").

**NOTE:** You can provide access to a list of up to 24 client codes using one INLIST for the Client. If the Client has more than 24 client codes to review, you just need to start a new INLIST for the additional client codes by separating the INLISTS with OR.

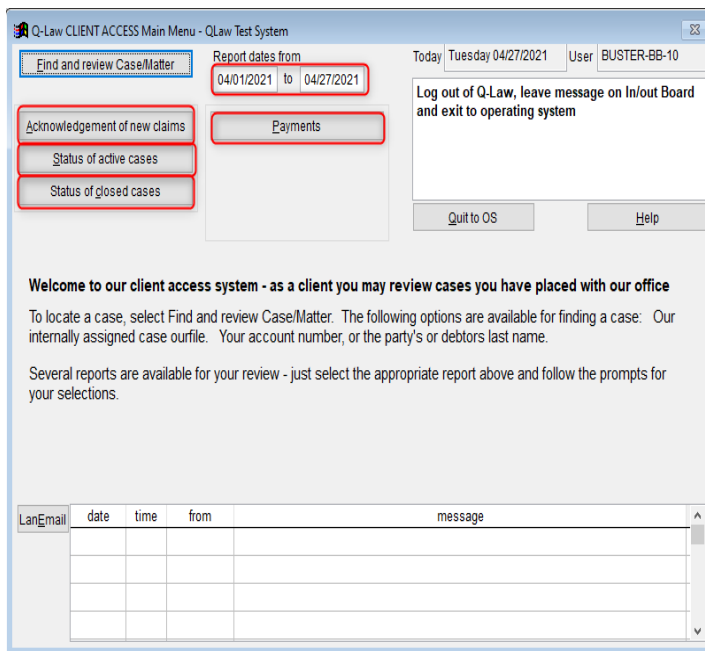


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Vertican suggests the use of a Gotomypc.com or Logmein.com product to be installed on a workstation configured with windows security that provides only access to one Shortcut: The Q-Law workstation desktop shortcut. Your IT department should be able to set up security settings if the Client is using remote access.

**NOTE:** The workstation will also need to have Adobe Acrobat reader installed to access the client reports.

Once you provide the Client with their Q-Law name and password, they will have access to the below client screen. As represented in this image, this screen is very different due to the Client's limited access.



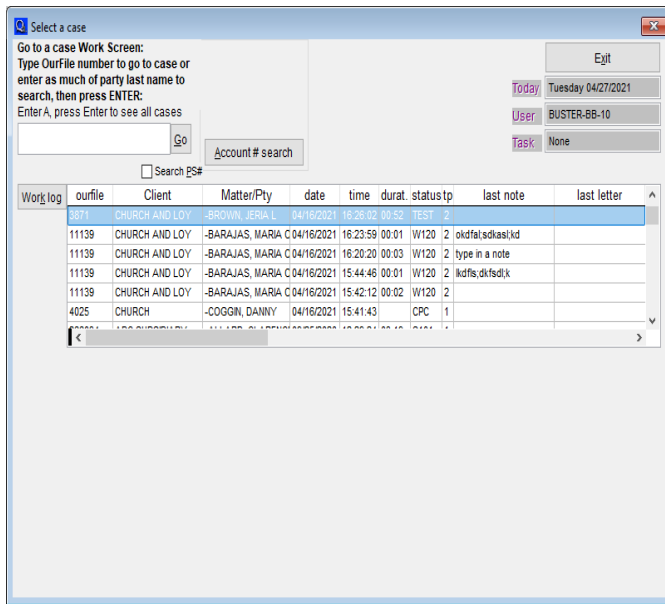
### To run reports

The Client may enter a report date range in the Report dates from and to fields and then click **[Acknowledgement of new claims]**, **[Status of active cases]**, **[Status of closed cases]** or **[Payments]**.

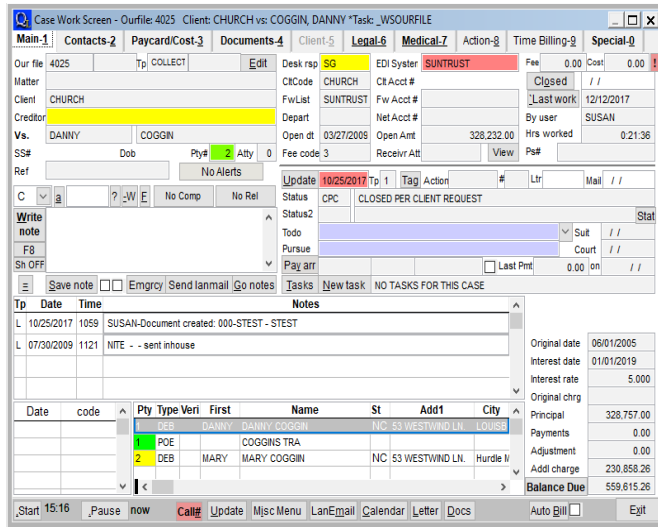
### To find and review a case in the case Workscreen

Click **[Find and review case/matter]**.

- Client can login and lookup case files by any of the following parameters.
  - Debtor's last name
  - Client account number
  - Forwarder account number
  - Q-Law ourfile number



The main Workscreen will appear.



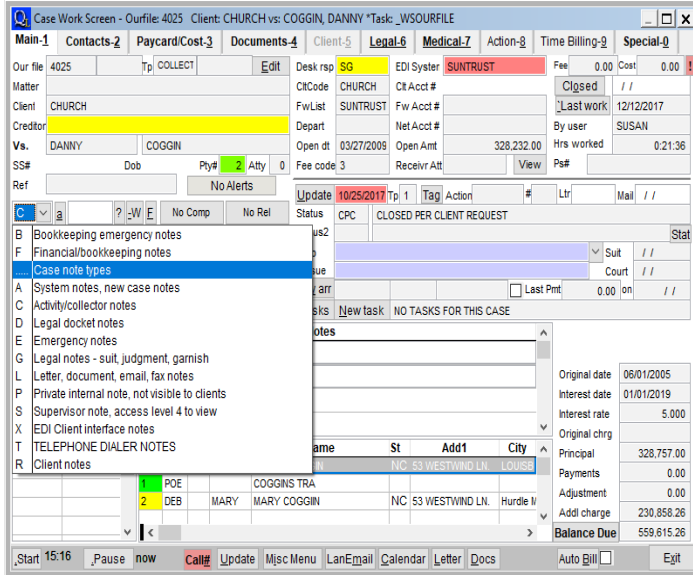
The Client will not be able to make any changes but can ONLY view the information. All the information will be grayed out which prevents them from making any changes.

The Client can send a Lanmail to the user on the account.

The Client may also review Documents and Go notes to review note history in detail.



**NOTE:** If you would like to prevent the Client from being able to see a note, you will need to change the status to either a P – Private internal note, not visible to clients or S – Supervisor note, access level 4 to view before entering the note.



Client will need to click **[Exit]** in the lower right-hand corner when done reviewing the case file.

### Changing Client Access Settings

If you would like to give the Client access to be able to perform additional functionalities you will need to change the security level access for the function or give the user access to a specific function by putting their username in the People column. You can do that by following the below steps.

1. Click **[Maintenance]**
2. Choose the System maintenance – Admin tab
3. Click **[Security Level]**
4. Click **[Locate]** and enter in the code i.e. WSMAIN
5. Change the seclevel to 10

