



LegalTypist, Inc.

Virtually@YourService!™

HOW TO SET UP AND USE A LEGALTYPIST WORKFLOW



WELCOME

Section 1: Your New LegalTypist Workflow

What Is a LegalTypist Workflow?

A **LegalTypist Workflow** is the equivalent of having a firm word processing department in web-space. It is manned by **LegalTypist Digital Assistants (DAs)** - who transcribe, revise, and enter data so on-site personnel can focus and get things done.

Why Use a LegalTypist Workflow?

Everyone has too much to do and not enough time. Delegating the time consuming or repetitive work reduces backlogs, increases productivity and decreases the level of stress inherent in any law office. After-hours, overflow or for specialized projects, discuss with your firm administrator what work you'd like to put through.

Typically, those who use their **LegalTypist Workflow** more easily stay on top of billable time, client follow up and memos to file by capturing their thoughts and notes immediately following each meeting / court date / call.

You, too, can stay on top of the details, more accurately capture time and/or organize your thoughts and to do's by simply using the LegalTypist Workflow now set up for you. Here's how:

There are 4 ways to get your work in process:

1. Dial our toll-free number and talk, using the keypad to control the process.
2. Upload documents, files, and instructions on the Submit-A-File page
3. Purchase, install & configure the app Dictate+Connect (available in Apple and Android stores)
4. Fax - request your custom cover sheet and use our toll-free number

All you need to remember to work your **LegalTypist Workflow** is your User ID - typically your 7-digit direct dial telephone number, no area code. Just the 7 digits. If you do not have or know your direct dial telephone number, contact your firm administrator for your **LegalTypist Workflow** User ID.

Use your **LegalTypist Workflow** User ID to send in work from your desktop, laptop and mobile devices.



SEND IN WORK

Section 2: Get Work In Process

DIAL IN
DICTATIONTOLL FREE
NUMBER24/7
AVAILABILITYNO CAPITAL
EXPENDITUREKEYPAD
DICTATION
FUNCTIONS

1. Toll-Free Dial In Dictation

1. Call 1-888-571-9719
2. Enter your User ID
3. Press the number 1 to begin a new file
4. Press 2 to begin recording
5. Use 8 to pause
6. Press 9 to end recording and send file standard service OR
7. Press 7 to end recording and send RUSH service*.

**It is highly recommended that the RUSH option be used with approval of firm administrator as higher rates apply.*

2. Web Upload

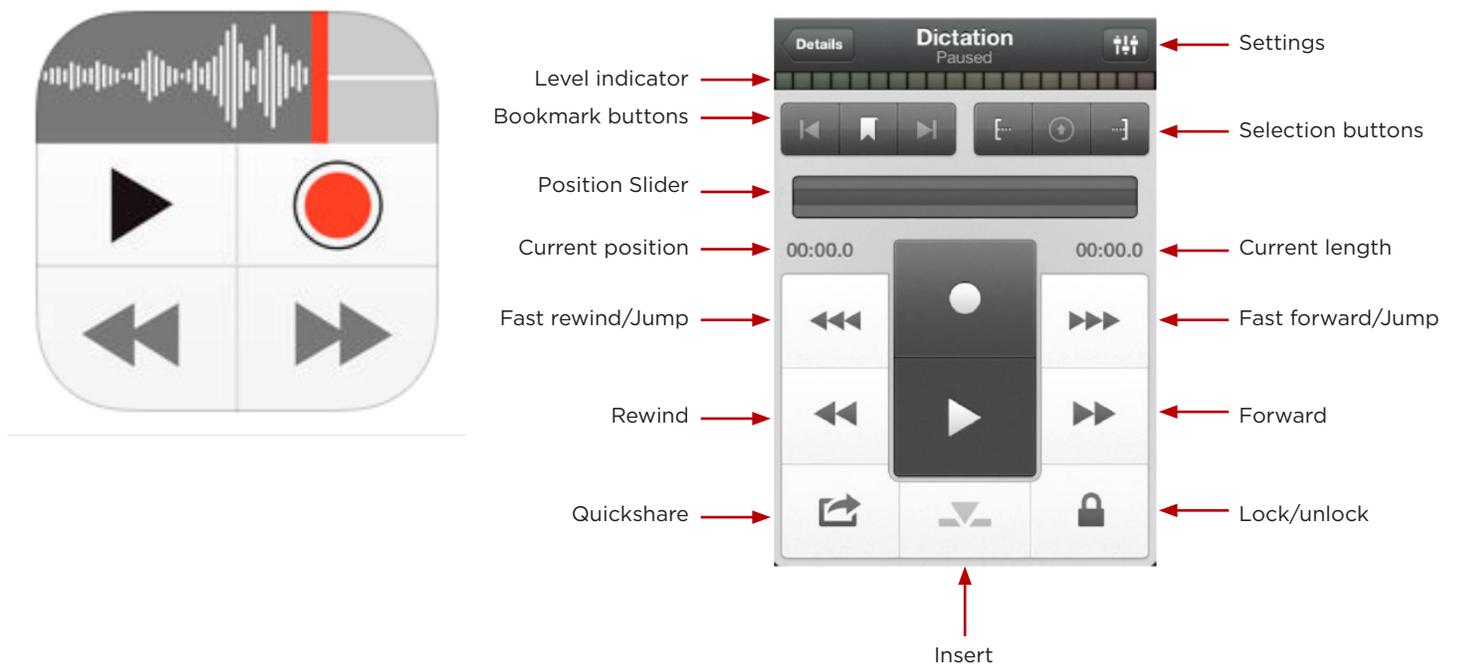
Simply navigate to the LegalTypist website and the [Submit-A-File](#) page. There you will find you, or your Assistant, can securely transfer up to 3 files at a time.

WEB
UPLOADSECURE FILE
TRANSFERAVAILABLE
24/7DIRECT
FROM WEB

3. The App - Dictate + Connect

Set up Dictate + Connect to work with your LegalTypist Workflow:

1. Download the App “Dictate + Connect” to your Apple or Android device:



Go into Settings →

2. Sharing;



3. Add New Destination; USA; and click on the colorful LegalTypist logo.

4. For ID – input your LegalTypist User ID
5. Hit Return; then Save.
6. You also need to go in and adjust your Workflow by clicking back into Settings (the gear icon) and then click on **Quickshare**.
7. Select **LegalTypist** from list.



8. Then hit Save.

Now every file created will auto-transfer to your **LegalTypist Workflow**.

4. VIA FAX

Send to: 1-877-371-9096

Use a cover page and clearly mark your User ID on the cover page.

Please note: LegalTypist Workflows do not accept work product via e-mail. Rather, Users securely transfer files on the [Submit-A File](#) page.

No matter how you get your work and files in process, your **LegalTypist Workflow** will provide a confirmation – on screen, via e-mail or via fax confirmation.

If, for any reason, you do not get a confirmation, or you think a file has gone astray, e-mail support@legaltypist.com or call **1-866-848-2195 x104** and be sure to have the User ID + date/time file(s) put in process. Responses are directed to the same e-mail address as return of work product.

Requests for support are processed Mon-Fri 9am/9pm ET; Sat 9am/12pm

WORK IN PROGRESS

Section 3: Processing ...

LegalTypist securely routes incoming files to the next available Digital Assistant (DA) assigned to service your firm's account.

LegalTypist DAs are all 100% US based, experienced legal secretaries. All DAs assigned to your Workflow are made familiar with your firm's way of getting things done.

- Files are accepted 365/24/7.
- Processed Monday through Saturday.
- LegalTypist is closed Sundays and Federal Holidays.

You have two options for processing: Standard and Rush

1. Standard = next day return
2. Rush = pull first priority

All files are treated as Standard files unless marked as a RUSH priority. Higher rates apply for rush files and may require firm administrator approval.



RETURN OF WORK

Section 4: Delivery

Upon the completion of each job, the secure file transfer process starts – and an email with link to securely connect to the server and download the file is sent to the admin e-mail set up for each User.

LegalTypist utilizes **SendThisFile** for the secure transfer of attorney-client work product. The notification e-mail is auto-generated from the SendThisFile service. This can trigger your filter treat the message as junk/spam. If you do not see a returned file, first check your junk/spam folder before e-mailing [support @legaltypist.com](mailto:support@legaltypist.com).



For security purposes:

- links expire after 1 download
- remain active for 7 days
- are routinely purged from the server

If, for any reason, a download is interrupted, or a file is not obtained on download, email [support @legaltypist.com](mailto:support@legaltypist.com) and a new link will be sent.

It is best if you download all files as received, but certainly within 7 days of initial delivery.

LegalTypist does not retain copies of returned files. 8 days after delivery, all files on the secure server are purged.



EXTRA HELP

Section 5

Here is a link to the **Dictate+Connect** support page where you can download manuals with screenshots based on your device:

http://www.dictate-connect.com/?page_id=23

If you have never dictated or wish to learn more, visit our Dictation page at

<http://www.legaltypist.com/dictate>

