

Lexis Affinity Precedents and Document Management

KEY FACTS

Delivery:

Online Seminar

Course Duration:

1 hour

Description

This webinar is designed to increase awareness to Lexis Affinity users on the features and benefits of utilizing custom/in-house Precedents within Affinity and getting the most out of Lexis Affinity Document Management;

Content includes:

Precedents:

- Demonstrating the different types of Precedents (including basic to advanced functions) and how they can optimize document output
- Categorizing your Precedents
- Precedent Packs – what are they and why use them
- How data input affects Precedents and the merged results

Document Management:

- More than just saving your documents
- Document Folders
- Document Preview
- Emailing Documents
- Document Import (adding external documents to Affinity)
- Tips and Tricks
- Creating PDF Bundles
- Viewing Document Lists against Phonebook, Client and Matter Records
- Full Text Searching

Pre-requisite knowledge:

General use of Affinity