



EffortlessLegal

## Summary

- Automates your entire intake process
- Invites potential clients
- Sign up clients from your website
- Automates conflict checks
- Comes with several ready-to-use intake forms
- Customizes your own intake forms

## Overview

- Form builder
- Add, Invite and Assign Applicants
- Review applicants
- Settings

## Where to Begin

EffortlessIntake is launched from the EffortlessLegal dashboard. To begin, you will need to sign up with an account, and can then log in to the dashboard from the EffortlessLegal homepage. Input your credentials, and you will be directed to the dashboard as shown below. Select EffortlessIntake, or purchase the app if you have not done so already. If you would like to learn more on how to create an account with EffortlessLegal, [click here!](#)

The screenshot shows the EffortlessLegal dashboard. On the left is a navigation menu with options: Dashboard, Account Settings, My Apps, Purchase History, and Manage Users. The main content area is titled 'My Apps' and contains three app cards: EffortlessIntake, LEDESConvert, and BillerAssist. The EffortlessIntake card is highlighted with a red border. It features an icon of a document with a pencil and a magnifying glass, the title 'EffortlessIntake', a subscription expiration date of 6/17/2018, and a description: 'Effortlessly interview potential new clients, and conduct preliminary conflict checks!'. The LEDESConvert card has a circular arrow icon, the title 'LEDESConvert', a subscription expiration date of 6/15/2018, and the description: 'The first app that easily converts invoices from one LEDES format to another!'. The BillerAssist card has a briefcase icon with a dollar sign, the title 'BillerAssist', a subscription expiration date of 6/15/2018, and the description: 'Increase productivity with computer-assisted billing, automation, and machine learning!'.

## Form Builder

Upon signing-in, select “admin” as it is the only role in EffortlessIntake. Sample forms have already been generated to the right, or you can create your own form by selecting “New Form.”

The screenshot shows the 'Welcome to EffortlessIntake!' page. At the top, it says 'Intake forms'. Below that, there are buttons for 'New Applicants', 'Get invitation link', and 'Invite applicants'. A date and time display shows 'July 16 MONDAY 12:18 PM'. The main content area is titled 'Intake Forms' and contains a list of forms. The 'Auto Accident' form is currently selected. Below the list, there is a '+ New Form' button highlighted with a red border. To the right, there is a 'Sample forms' section with a list of forms: Auto Accident, Medical Malpractice, Divorce, Personal Injury, and Probate. Each form has 'Preview' and 'Add this form' links, which are also highlighted with a red border.

## New Form

Selecting “New Form” allows you to create your own intake form for potential clients. EffortlessIntake gives you various options to create a form as best as you see fit.

1. “Form” allows you to drag and drop a form component from the left into the tab above labeled “Drag and Drop a form component.”

Form type: Form Form title: Type title... Preview Save form

Basic Components

- Text Field
- Number
- Password
- Text Area
- Check Box
- Select Boxes
- Select
- Radio
- HTML Element
- Content
- Button

Special Components

Layout Components

Submit

Drag and Drop a form component

2. Selecting “Wizard” allows you to add pages and navigate between each page individually as tabs as you continue to build your form. Let’s add three pages by selecting “+PAGE” as shown below.

Form type: Wizard Form title: Type title... Preview Save form

Basic Components

- Text Field
- Number
- Password
- Text Area
- Check Box
- Select Boxes
- Select
- Radio
- HTML Element
- Content
- Button

Special Components

Layout Components

Page 1 / Page 2 / Page 3 / + page

Page 1

Drag and Drop a form component

- Next, you can begin to populate the form you are creating by selecting and dragging components from the left with either “Basic”, “Special” or “Layout” components.

## Basic Components

You can see the “Basic Components” associated with this tab to build an intake form below.

The screenshot shows a sidebar on the left with three panels: "Basic Components", "Special Components", and "Layout Components". The "Basic Components" panel is highlighted with a red border and contains a list of 13 items: Text Field, Number, Password, Text Area, Check Box, Select Boxes, Select, Radio, HTML Element, Content, and Button. To the right of the sidebar is a form builder interface with three pages labeled "Page 1", "Page 2", and "Page 3". Each page contains a large blue rectangular area with the text "Drag and Drop a form component". A "Submit" button is located at the bottom left of the form builder area.

## Special Components

You can see the “Special Components” associated with this tab to build an intake form below.

The screenshot shows a sidebar on the left with three panels: "Basic Components", "Special Components", and "Layout Components". The "Special Components" panel is highlighted with a red border and contains a list of 16 items: Email, Phone Number, Address, Date / Time, Day, Time, Currency, Hidden, Resource, File, Form, Signature, Custom, Container, Data Grid, and Edit Grid. To the right of the sidebar is a form builder interface with three pages labeled "Page 1", "Page 2", and "Page 3". Each page contains a large blue rectangular area with the text "Drag and Drop a form component". A "Submit" button is located at the bottom left of the form builder area.

## Layout Components

You can see the “Layout Components” associated with this tab to build an intake form below.

The screenshot shows a form builder interface. On the left, there is a sidebar with three tabs: 'Basic Components', 'Special Components', and 'Layout Components'. The 'Layout Components' tab is selected and highlighted with a red box. Below this tab, there are five options: 'Columns', 'Field Set', 'Panel', 'Table', and 'Well'. The main area of the interface shows three pages: 'Page 1', 'Page 2', and 'Page 3'. Each page contains a large blue bar with the text 'Drag and Drop a form component'. At the bottom of the interface, there is a 'Submit' button.

Let’s go back to “Basic Components” tab and drag “Text Field” into the form builder space.

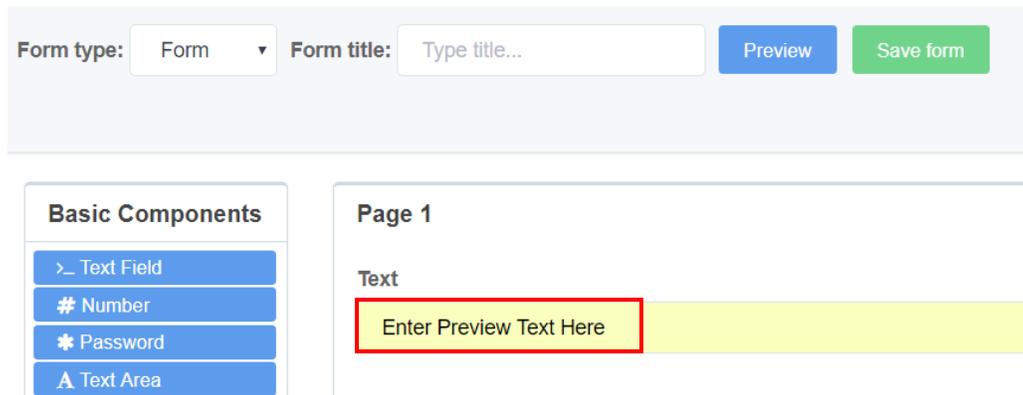
1. You can begin populating information in the fields below to create the form. Each field has a next  to it with a brief description of what is necessary for the field.
2. On the right, you will see “Preview” box. You can add a text description to label that component as you continue to work on other components as you your form. Click “Save” to complete.

### Text Field Component

[Help!](#) 

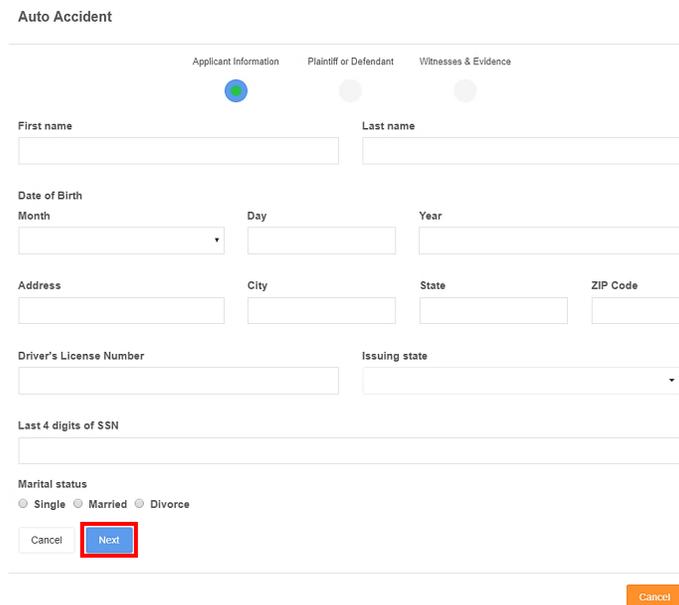
The screenshot shows the configuration and preview interface for a Text Field Component. On the left, there are five tabs: 'Display', 'Data', 'Validation', 'API', 'Layout', and 'Conditional'. The 'Display' tab is selected. Below the tabs, there are four configuration options: 'Label' (with a value of 'Text'), 'Hide Label' (checkbox), 'Label Position' (dropdown menu set to 'Top'), and 'Placeholder' (with a value of 'Placeholder'). On the right, there is a 'Preview' box containing a text field with the text 'Enter Preview Text Here'. Below the preview box, there are two buttons: 'Save' (green) and 'Remove' (red). A red box highlights the 'Preview' box and the 'Save' button.

3. You can see the text preview shown below and can now do this for the rest of the components you wish to add as you continue to build your form.



## Sample Forms

If you wish to use the sample forms provided, select one of the five options. If you select “Preview,” the form will emerge. Let’s try “Preview” for “Auto Accident.”



1. You can now preview the “Auto Accident” intake form as if you were a potential client. At the top of the sample form, you can view the steps associated with the form you selected.
2. For “Auto Accident,” there are three steps: “Applicant Information”, “Plaintiff or Defendant” and “Witnesses & Evidence.”
3. Click “Next” to surf through the sample form to see if it contains all the necessary fields you prefer.

4. To add a sample intake form, select “Add this form” on the right. Click “Confirm,” and then edit the sample form as preferred. Click “Preview” to get an overview or “Save Form” if complete.

The screenshot shows the 'Intake Forms' dashboard. On the left, a green header reads 'Intake Forms' and below it, a message says 'You do not have any forms yet' with a '+ New Form' button. On the right, under 'Sample forms', there is a list: 'Auto Accident' with a red-bordered 'Preview Add this form' link, 'Medical Malpractice' with a 'Preview Add this form' link, and 'Divorce' with a 'Preview Add this form' link.



### Add form

Form "Auto Accident" will be added to your list.

Two buttons are shown: a blue 'Confirm' button with a red border and an orange 'Cancel' button.



The screenshot shows the form editor for 'Auto Accident'. At the top, it says 'Form type: Wizard' and 'Form title: Auto Accident', with 'Preview' and 'Save form' buttons. Below is a breadcrumb trail: 'Applicant Information / Plaintiff or Defendant / Plaintiff / Defendant / Witnesses & Evidence / + page'. The main form area is titled 'Applicant Information' and contains fields for 'First name', 'Last name', 'Date of Birth' (with sub-fields for Month, Day, and Year), 'Address', 'City', and 'State'. On the left, there are 'Basic Components', 'Special Components', and 'Layout Components' panels.



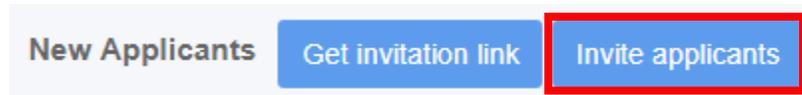
The screenshot shows the 'Intake Forms' dashboard after the form has been added. The 'Auto Accident' form is now listed in the 'Intake Forms' section on the left, with 'Assign Applicants' and 'Delete' buttons highlighted with a red border. The 'Sample forms' list on the right remains the same.

5. Once complete, you will see the form in the intake section. You can then “Assign Applicants” or “Delete” the intake form.

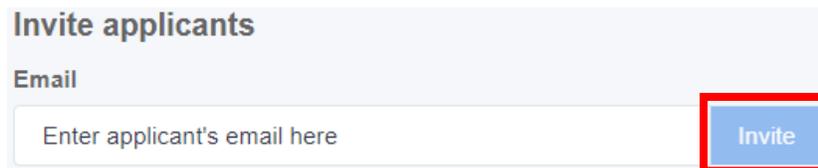
## Assigning Applicants

An applicant is a potential client that you would like to invite to complete your intake form. Once a potential client is invited and completes their sign up, you can assign them to fill out an intake form.

1. First, for an applicant to appear in “Assign Applicants,” go to the “Form Builder” tab or the “Settings” tab on the top of the page to invite an applicant. Select “Invite applicants.”



2. Enter a potential applicant’s email below and click “Invite.”



3. The invited applicant will receive an email to register with EffortlessIntake. Select “Sign up” and complete the form to the right and click “Sign Up.”

Hi!

Law Firm 1 would like for you to register with our service.

To continue, please press this button below:



Law Firm 1

First Name \*  
Jane

Last Name \*  
Doe

Email \*  
janedoe.incubatorllc@gmail.com

Phone Number \*  
(312) 555-5555

Password \*  
.....

Confirm Password \*  
.....

Sign Up

- Next, the invited applicant will have to provide some information about himself or herself, and about the persons or companies who will be adverse to them.

The screenshot shows a form titled "QUESTIONS FOR YOU" with sub-sections "ADVERSE PARTIES" and "NATURES OF MATTER". The form asks for contact information for an individual or company. The fields are filled with the following data:

- Individual or company: Individual
- First name: Jane
- Last name: Doe
- Email address: janedoe.incubatorllc@gmail.com
- Phone number: (312) 555-5555
- Street address: 123 Main St
- City: Chicago
- State: Illinois
- Zip/Mailing code: 60602
- Country: United States

A red box highlights the "Continue" button at the bottom of the form.

- Once the invited applicant completes the form above, you will be able to assign them to an intake form by selecting "Assign Applicants" in the "Intake Forms" section.

The screenshot shows the "Intake Forms" section of a dashboard. The header is green and contains the text "Intake Forms". Below the header, there is a list of intake forms. The first form is titled "Auto Accident". To the right of the "Auto Accident" form, there is a red box highlighting the "Assign Applicants" button. Other buttons visible are "Delete" and "+ New Form".

- You will now see the invited applicant that you can assign to the intake form. Select “Assign” for Jane Doe under “Edit.”

Assigned Applicants

Name	Email	Edit

1 1 25 items per page

Search Applicants

.inc

Name	Email	Edit
Jane Doe	janedoe.incubatorllc@gmail.com	<a href="#">Assign</a>

- Your invited applicant can now fill out the “Auto Accident” form that we began with. The applicant can fill in the necessary fields, and then submit the form.

Applicant Information    Plaintiff or Defendant    Witnesses & Evidence

First name    Last name

Date of Birth

Month    Day    Year

Address    City    State    ZIP Code

Driver's License Number    Issuing state

Last 4 digits of SSN

Marital status

Single    Married    Divorce

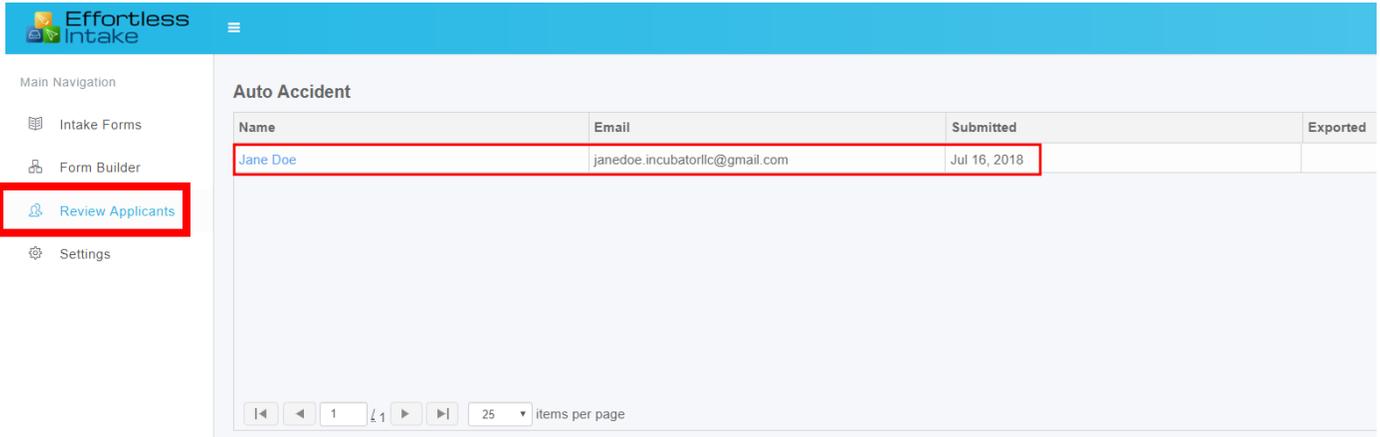
Cancel   Next

Back

Once complete, the intake form will be ready for your review.

## Review Applicants

You can view the submitted intake form in the “Review Applicants” tab in EffortlessIntake. You will receive an email once the applicant has submitted their intake form. Continuing with the example previously, see below how the auto-accident intake form is ready for review.

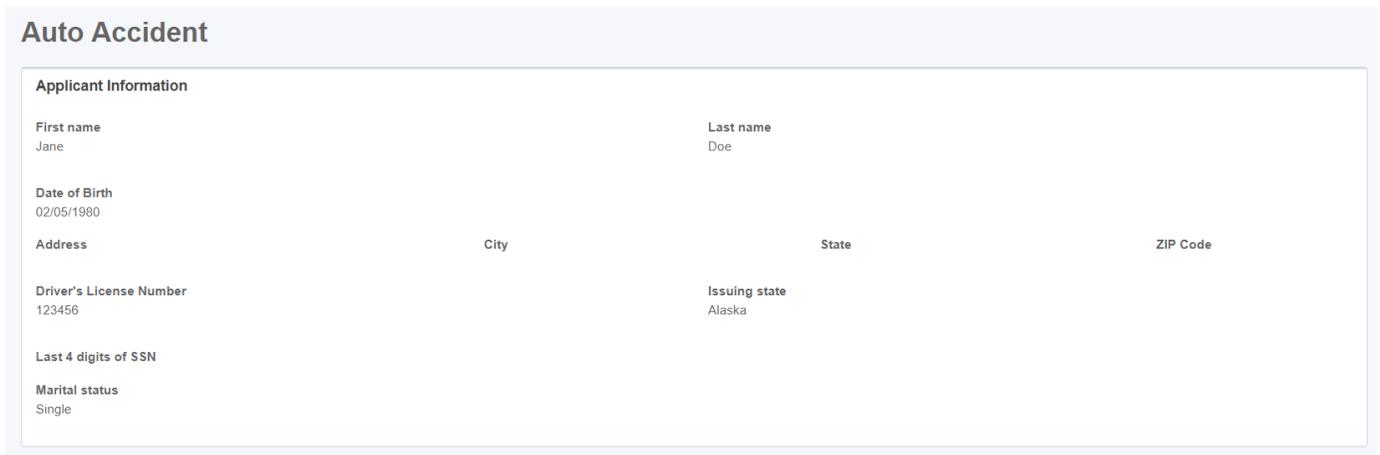


The screenshot shows the EffortlessIntake application interface. On the left is a navigation menu with options: Intake Forms, Form Builder, Review Applicants (highlighted with a red box), and Settings. The main content area is titled 'Auto Accident' and displays a table with the following data:

Name	Email	Submitted	Exported
Jane Doe	janedoe.incubatorllc@gmail.com	Jul 16, 2018	

At the bottom of the table, there is a pagination control showing '1' of '1' items, with a dropdown menu set to '25' items per page.

1. Select the applicant’s name, Jane Doe, to review the submitted intake form.



The screenshot shows the 'Auto Accident' applicant information form. The form is titled 'Applicant Information' and contains the following fields:

First name	Jane	Last name	Doe
Date of Birth	02/05/1980		
Address	City	State	ZIP Code
Driver's License Number	123456	Issuing state	Alaska
Last 4 digits of SSN			
Marital status	Single		

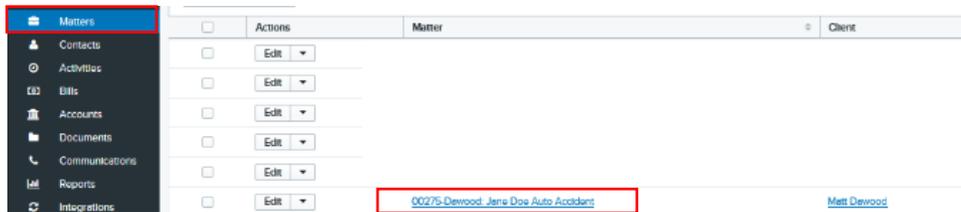
- After reviewing the submission, a user will have the option to either export to Clio, create a PDF or to delete the submission.



- To “Export to Clio,” enter a matter description that is similar to or matches the current billing system you are using and then click “Export.” You will be prompted with a message to authorize access in order to connect to Clio.



The submission will then automatically upload to Clio’s “Matters” tab.



- Select “Create PDF” to automatically download a PDF file of the intake form to the browser.
- If you choose not to move further with the submitted intake form, you can choose to delete it. Select “Delete Submission” and then click “Confirm.”

#### Delete submission

Are you sure want to delete the submission?



## Settings

You can manage their EffortlessIntake account on in the “Settings” tab.

The screenshot shows the EffortlessIntake user interface. On the left, a 'Main Navigation' sidebar lists 'Intake Forms', 'Form Builder', 'Review Applicants', and 'Settings', with 'Settings' highlighted by a red rectangular box. The main content area displays various account settings: 'New Applicants' with 'Get invitation link' and 'Invite applicants' buttons; 'Preliminary Conflicts Check' with a toggle switch and the text 'Enable Preliminary Conflicts Check'; 'Natures of Matters' with a 'Manage List Your Applicants Will See' button; 'Public URL' showing a URL and a 'Change' button; 'Change Email Domain' with a 'Manage Email Domains' button; and 'Integration Bars' with a toggle switch and the text 'Clio Integration Bar'. Below this, it indicates 'Clio' status as 'You are not connected to Clio' with a 'Sign in to Clio' button.

## Applicants

To get an invitation link that is sharable, select “Get invitation link” and a shareable link will automatically copy to the user’s clipboard. Paste the link in an email, text or select “Invite applicants” to enter an email address manually to send an invite similarly to the example at the beginning.

This is a close-up of the 'New Applicants' section from the screenshot above. It shows the text 'New Applicants' followed by two blue buttons: 'Get invitation link' and 'Invite applicants'. Both buttons are enclosed in a red rectangular box.

This can also be done upon logging in to EffortlessIntake at the beginning under “Form Builder.”

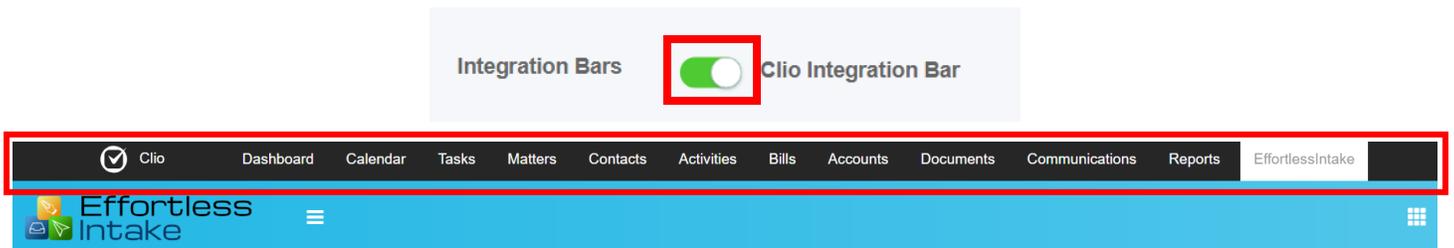
The screenshot shows the 'Form Builder' page in the EffortlessIntake interface. The 'Main Navigation' sidebar on the left lists 'Intake Forms', 'Form Builder', 'Review Applicants', and 'Settings'. The main content area features a 'Welcome to EffortlessIntake!' message and a 'New Applicants' section. The 'New Applicants' section contains the 'Get invitation link' and 'Invite applicants' buttons, which are highlighted with a red rectangular box.

## Clio

Integrating EffortlessIntake with Clio simplifies the intake process even more. You can sign-in to connect both platforms, as well as to link Clio's integration bar to EffortlessIntake's dashboard as shown below. If you did not sign in during the example above when we exported the file to Clio, you can do it here similarly to the steps shown above.

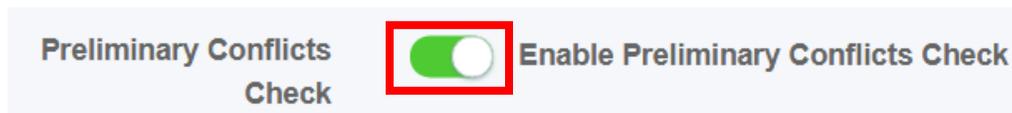


Select the toggle button as shown below and Clio's integration bar will appear above the page.



## Preliminary Conflicts Check

You can enable preliminary conflicts checks by selecting the toggle button, which will automatically conduct conflict checks between a potential client and a current client within your practice management system.



## USER NOTE

We allow our users to add applicants as “Contacts” in Clio. Here are the steps:

1. Turn on “Preliminary conflicts checks” in the Settings tab
2. Our application automatically sends an invitation link to the applicant
3. Applicant fills out a preliminary conflicts check form provided by our application
4. Our user is then given the option to add the applicant as a “Contact” in Clio

The above process is designed to accommodate our users who want to add a link to their law firm website. This way, our users can have potential new clients screened automatically, before our users receive any confidential information.

Alternatively, potential new clients could be screened for conflicts by inviting them in the “Settings” tab or in the “Form Builder” tab. If preliminary conflict checks is turned off, then an applicant can be assigned a form to fill out immediately.

In this case, our app assumes that the conflict check has already been completed, and that our user can accept confidential information from the applicant. Thus, the applicant should already be a “Contact” in Clio (with conflicts cleared).

With conflicts cleared, our app allows our user to easily interview the applicant to obtain their complete (confidential) information. Once the applicant fills out the form assigned to them, our app provides the option to accept the applicant by setting the applicant up as a “Matter” in Clio.

## Public URL

You can alter your public URL by selecting “Change.” The Public URL setting allows you to add a link to our app in your website, and sign up new clients directly off your website. You can add the Public URL link we provide to your website. Enter a name you wish to alter your public URL to where it says “Name” and click “Save.”

**Public URL** <https://develop-intake.incubatorllc.com/?account=5650f38f-3c1c-4cc2-9df2-8144d5eaafb>

**Change Public URL**

**Name**

**Public URL** <https://develop-intake.incubatorllc.com/?account=5650f38f-3c1c-4cc2-9df2-8144d5eaafb>

Potential new clients can then simply sign up and then fill out a simple conflict check form directly from your website.

- We suggest enabling the Preliminary Conflicts check feature as shown above if you choose to do this.
- The link takes the visitor to our “Sign In” page. The “Sign In” page has a “Sign Up” function on it if the visitor does not yet have an account with the law firm.

**Effortless Intake**

Law Firm 1

Email address

Password

[Sign Up](#)

[Forgot password?](#)

**Effortless Intake**

Law Firm 1

First Name \*

Last Name \*

Email \*

Phone Number \*

Password \*

Confirm Password \*

[Sign In](#)

The default sign in page provided in the Public URL link is intended to allow the law firm to have their potential clients easily return to an intake questionnaire that the potential client started filling out but did not finish. In this case, the potential client can simply go to the law firm's website, log back in using the link to the "Sign In" page in our app, and then complete the questionnaire.

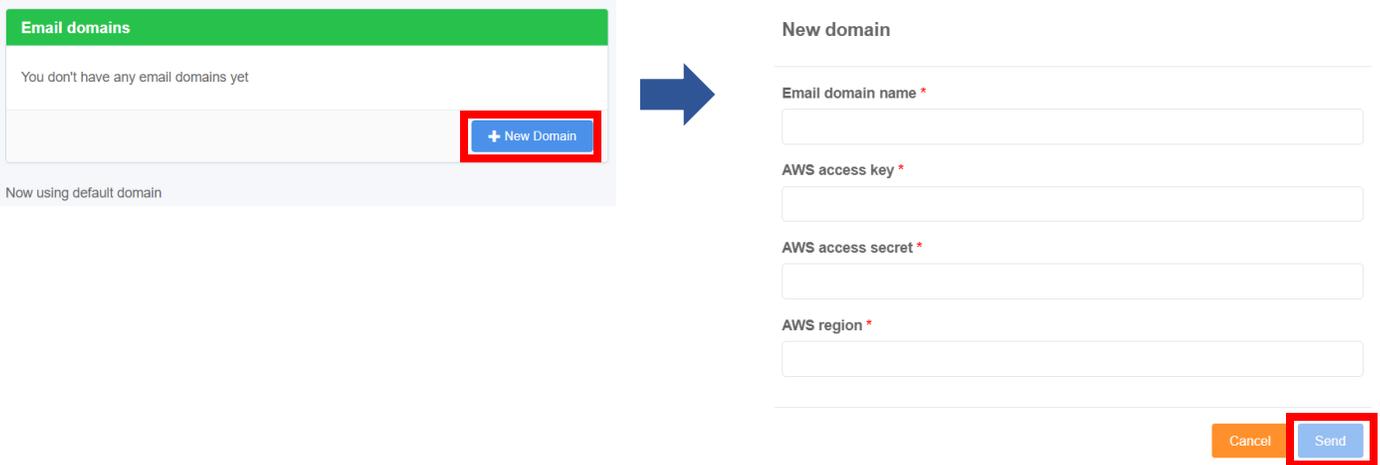
However, for new potential clients who do not yet have an account with the law firm, this may not be completely obvious. Therefore, the law firm may want to open the "Sign In" page, select "Sign Up" on that page, and then use the sign-up URL as the link the law firm hooks up to the law firm's website.

## Change Email Domain

You can send EffortlessIntake emails from an email address you own. By default, all emails will be sent from an EffortlessLegal.com email address. However, you can easily change the email address we use to send emails from our app, in order that the emails come from an address that you own.

Our app is integrated with Amazon SES, a popular email delivery service. You can sign up for a free Amazon SES account at: <https://aws.amazon.com>

Amazon SES is easy to set up. When you set up an account with Amazon SES, they will provide you with the information you need. Just press the "New Domain" button on the left to get started. This allows you to start sending emails from their own email address.



The image shows a two-step process for adding a new email domain. On the left, a screenshot of the 'Email domains' page shows a green header, the text 'You don't have any email domains yet', and a blue '+ New Domain' button highlighted with a red box. Below this is the text 'Now using default domain'. A blue arrow points from this button to the right, where a 'New domain' form is shown. The form has four input fields: 'Email domain name \*', 'AWS access key \*', 'AWS access secret \*', and 'AWS region \*'. At the bottom right of the form are two buttons: an orange 'Cancel' button and a blue 'Send' button highlighted with a red box.

## Natures of Matters

The Preliminary Conflict Check process allows your applicants to choose the nature of the legal matter for which they would like your assistance. The "List Your Applicants Will See" shows the types of legal matters your applicants will be able to choose from. You can add new types of matters to this list in the "New Nature of Matter" section. View a step by step below.

Natures of Matters

Manage List Your Applicants Will See



New Nature of Matter

Intake Example

Add



List Your Applicants Will See

Contract negotiations

Delete

Criminal Matter

Delete

Divorce

Delete

Employment Issue

Delete

Estate Planning

Delete

Purchase of property

Delete

Lawsuit

Delete

Intake Example

Delete

Now, you can manage your account all in one place with EffortlessIntake's "Settings" tab! Return to the "Form Builder" tab to begin again.

## Conclusion

- Automates your intake process
- Sign-up clients from your website
- Automates conflict checks
- Form builder
- Customizable
- Modifiable templates
- Integrates with other applications
- Paperless & easy to access
- Encrypted & secure