



# AbacusLaw

Perkins & Anctil, PC takes our Lien Enforcement Department to the next level with this Law Management Software

# Case Management

- ▶ Abacus Law is a revolutionary software that allows our firm to manage all aspects of Lien Enforcement actions from 1 platform.
- ▶ Abacus' technology allows our firm to customize its ability for our needs.
- ▶ Each individual file is inputted into Abacus and keeps track of all necessary dates, emails, documents, and notes pertaining to each action.
- ▶ Abacus gives us the ability to prepare monthly Status Reports for individual Associations in a matter of minutes.

Matter: ABC Condominium - Doe Unit 123

ABC CONDOMINIUM - DOE UNIT 123

1 Collections 2 Notes 3 Linked Names 4 Events 5 Docs 6 Emails 7 Exhibits 8 Facts 9 Billing Info 10 Add'l Billing

Matter: ABC Condominium - Doe Unit 123

File/case#: 17-2063 Court: [ ]

Attorney: DRC Paralegal: LUC Docket #: [ ]

Case Code: COLLECT Opened: 10/12/2017 Complaint date: [ ]

County of Jurisdiction: Middlesex Closed: [ ]

Referral: Client Client

**Unit Information**

Unit Address: 123 Main Street

Unit Address City: Anywhere

Unit Address State: MA

Unit Address Zip: 01234

**Payment Information**

Settlement Amount: 0.00

Payment Amount: 0.00

Date Due: [ ]

Grace Date: [ ]

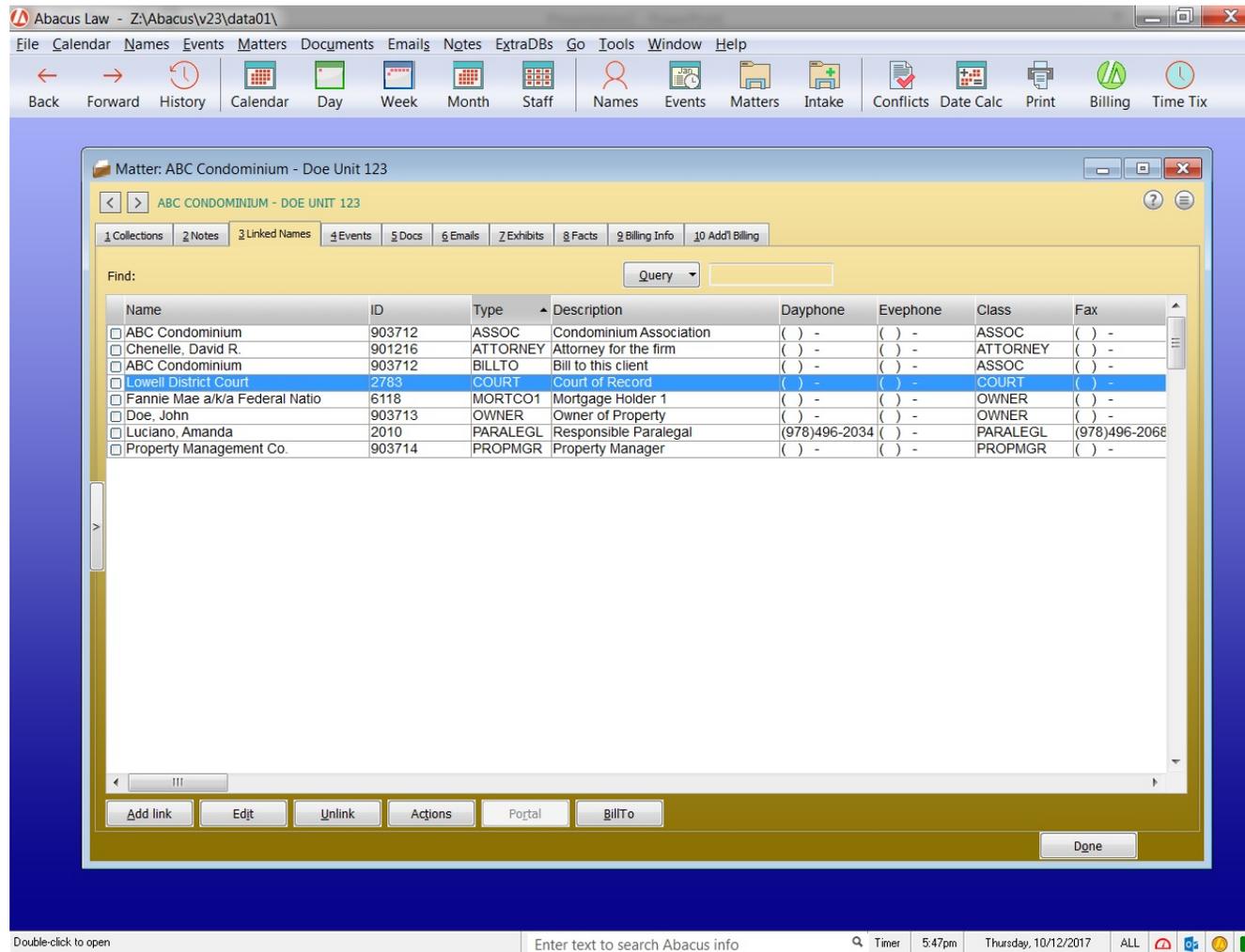
Total Monthly Payment: 0.00

Add Clone Delete Overview Print Bill Accounting Query ALL LUC Index MATTER

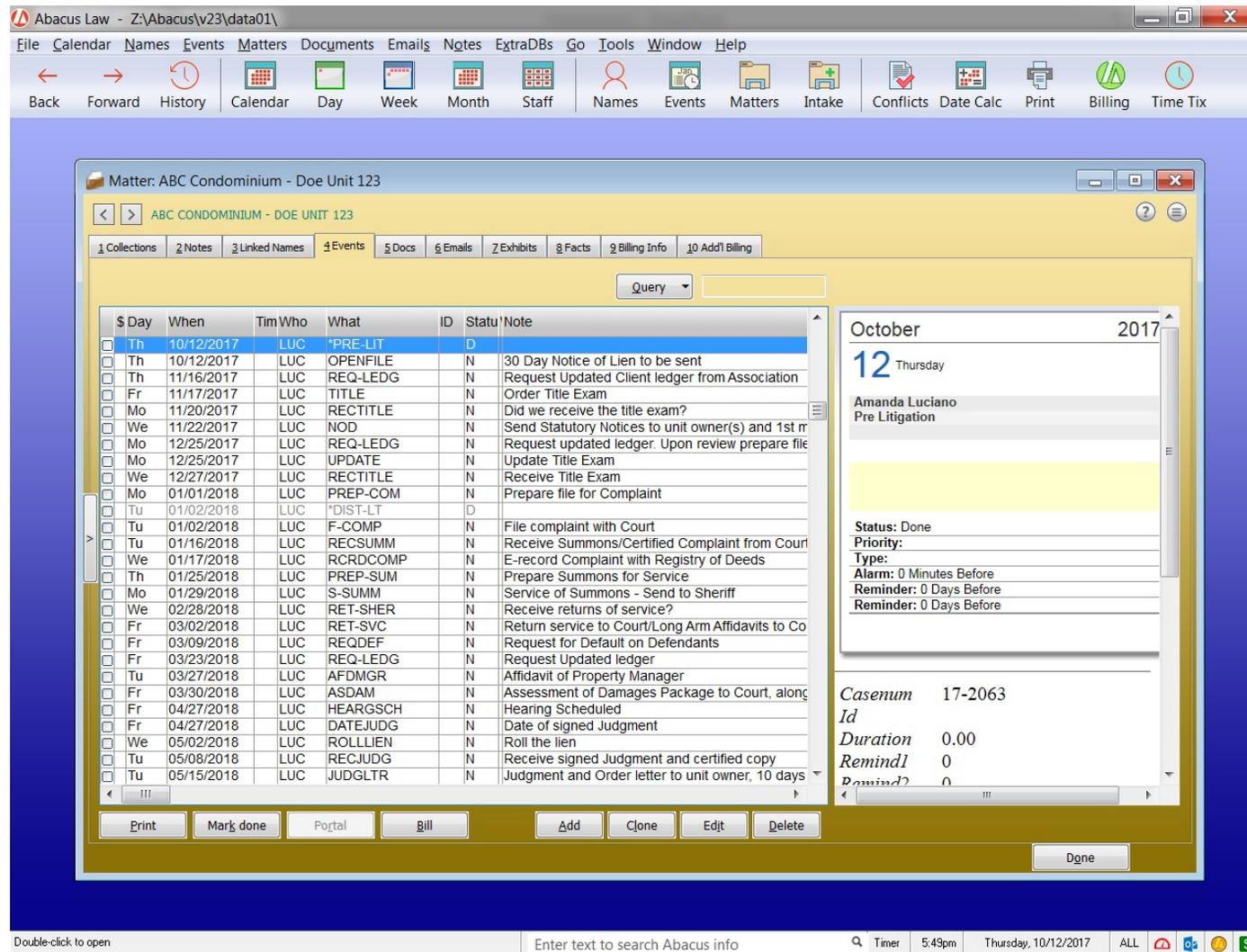
Dqne

Each case links the names of all parties involved.

These names allow us to easily create address lists, envelopes, and documents relative to each individual file.



Abacus allows us to create different “rules” for our cases. The rules are designed to manage our deadlines for each specific case regardless of the stage of the case.



The Abacus calendars allow the managing Attorney and assigned Paralegal to see scheduled events that are due for each day, which allows our firm to stay on track and move files as efficiently as possible.

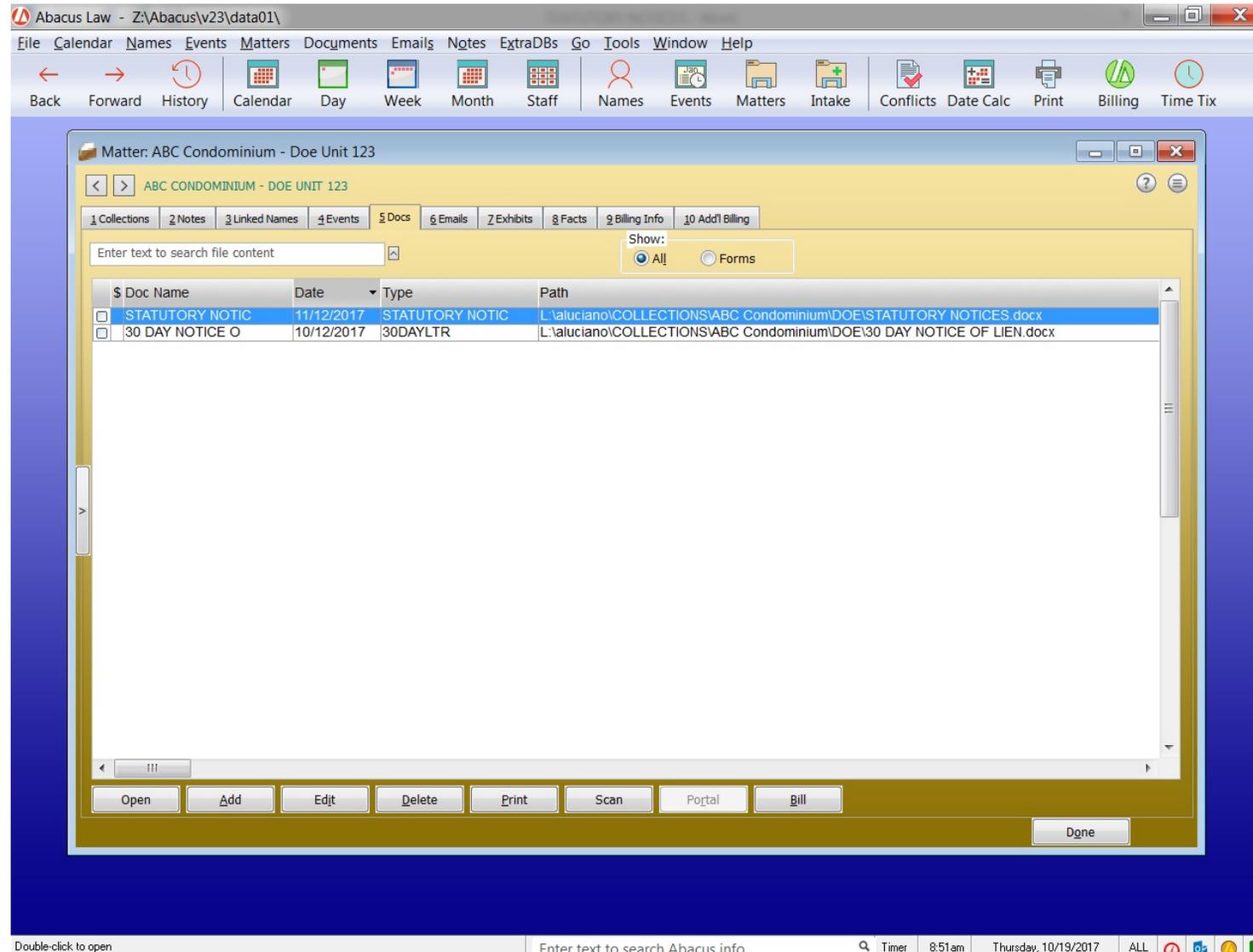
The screenshot shows the Abacus Law software interface. The window title is "Abacus Law - Z:\Abacus\v23\data01\". The menu bar includes "File", "Calendar", "Names", "Events", "Matters", "Documents", "Emails", "Notes", "ExtraDBs", "Go", "Tools", "Window", and "Help". The toolbar contains icons for "Back", "Forward", "History", "Calendar", "Day", "Week", "Month", "Staff", "Names", "Events", "Matters", "Intake", "Conflicts", "Date Calc", "Print", "Billing", and "Time Tix".

The main calendar area is titled "November 2017" and is managed by "Amanda Luciano". It displays a grid of dates from Sunday 29 to Saturday 4. The calendar shows several scheduled events:

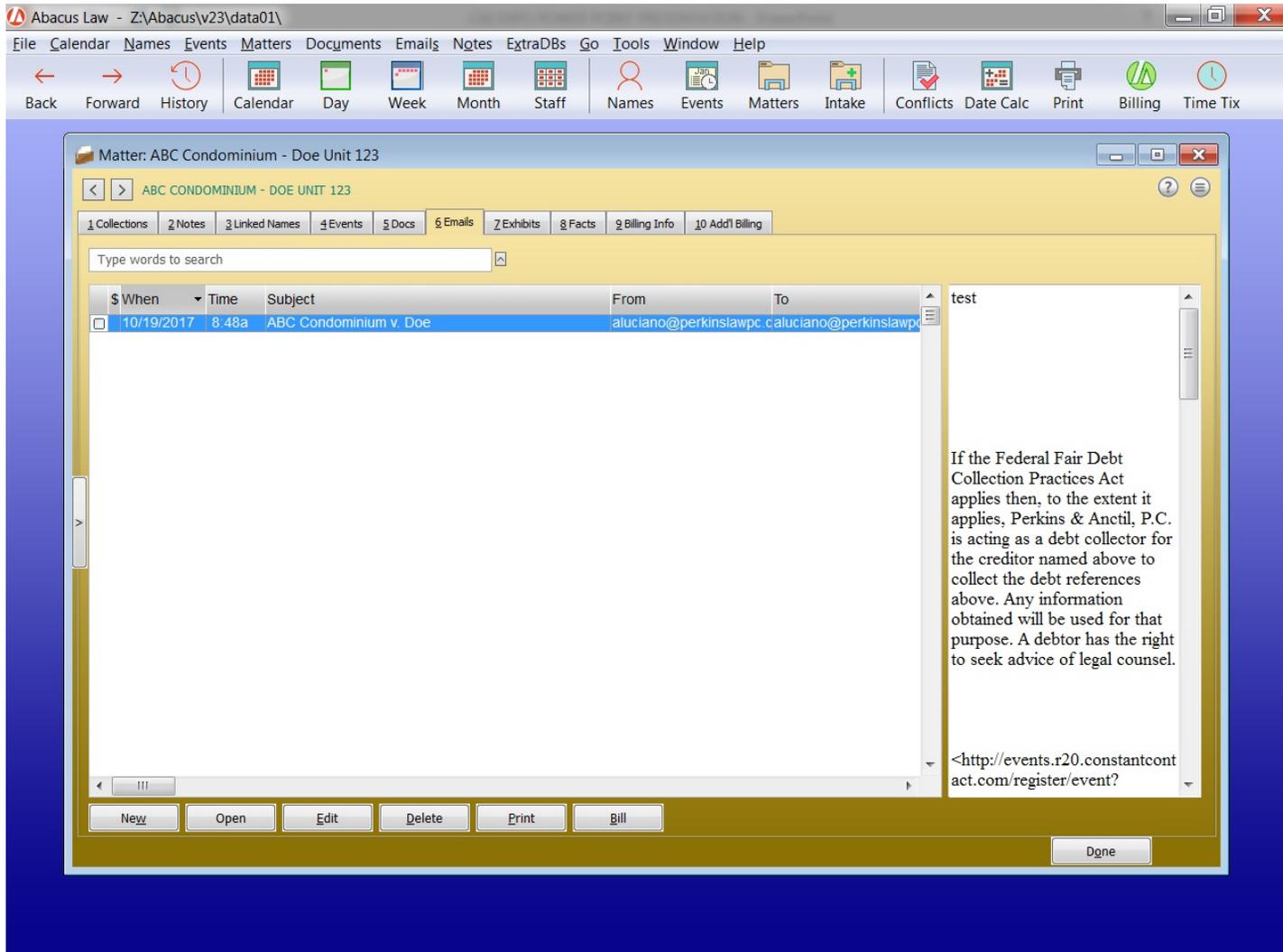
- Friday, 10: Veteran's Day
- Saturday, 11: Veteran's Day
- Thursday, 16: REQ-LEDG ABC Condorr
- Friday, 17: TITLE ABC Condominium
- Monday, 20: RECTITLE ABC Condomi
- Wednesday, 22: NOD ABC Condominium
- Thursday, 23: Thanksgiving

The status bar at the bottom shows "Perkins & Ancill, P.C.", a search bar with "Enter text to search Abacus info", a timer, the time "8:46am", the date "Thursday, 10/19/2017", and system icons for "ALL", network, volume, and power.

Abacus also allows us to link all the documents that pertain to each individual case including WORD document, PDFs, and emails that we receive.



We can also link everything from PM/Client emails, to ledger requests, Unit Owner emails, etc.. This organizational feature provides easy access to any emails that have been sent and/or received regarding each individual matter.



# Monthly Status Reports

- ▶ Monthly Status Reports are created for individual Associations upon request.
- ▶ These reports provide a detailed account of current and future events for each individual case.
- ▶ This is also a way for Property Managers to manage which cases we currently have active and which cases have closed that pertains to Lien Enforcement.

An example of what our typical status report consists of.

- The name of the matter (Association v. Unit Owner)
- The initials of the person who did the event (in this case AL)
- Each event description
- Date each event was completed, with the last event being the next to be done

Report Viewer

10/19/17 8:58a Perkins & Ancill, P.C. Page 1  
Matter Synopsis

Matter	Case Number	Attorney	Casocode	Closed
ABC Condominium - Doe Unit 123 -- Thursday October 12, 2017 --	17-2063	DRC	COLLECT	//
Events for ABC Condominium - Doe Unit 123 Thu 10/12/17	*PRE-LIT OPENFILE	AL AL	30 Day Notice of Lien to be sent	
-- Sunday November 12, 2017 -- -- Thursday November 16, 2017 --				
Events for ABC Condominium - Doe Unit 123 Thu 11/16/17	REQ-LEDG	AL	Request Updated Client ledger from Association	
-- Friday November 17, 2017 --				
Events for ABC Condominium - Doe Unit 123 Fri 11/17/17	TITLE	AL	Order Title Exam	
-- Monday November 20, 2017 --				
Events for ABC Condominium - Doe Unit 123 Mon 11/20/17	RECTITLE	AL	Did we receive the title exam?	
-- Wednesday November 22, 2017 --				
Events for ABC Condominium - Doe Unit 123 Wed 11/22/17	NOD	AL	Send Statutory Notices to unit owner(s) and 1st mortgage holder	

Number of Matters: 1

1 / 1 117% Page: 8.5 x 11

# Abacus Billing

- ▶ Abacus also allows us to bill directly from the software as well.
- ▶ Since our lien enforcement fees are billed on a flat fee basis, we are able to bill for each event with ease with specially designed codes, specific to our firm.
- ▶ This also allows for us to send out the bills on a monthly basis, as well as generate an invoice at any time throughout the process, if requested by client.
- ▶ With our new policy, although Invoices are submitted on a monthly basis, payment on our Lien Enforcement actions is not expected until the matter has been resolved and payment is provide by either the Owner or Lender. The Invoices are sent out so they can be applied to the Unit's Account Ledger.

An example of a typical Time Ticket.

- This showcases the "Timekeeper", which in this case is Attorney Chenelle.
- The "Activity Code" is one the specially designed codes for each event. In this case our 30-Day Notice of Lien with amount and description which will be printed on the invoice when generated.

The screenshot shows a software window titled "Time Tickets - Entering New Time". The window contains the following fields and controls:

- Client Number:** 903712 (dropdown), ABC Condominium (text)
- Date of Service:** 10/12/2017 (calendar)
- Matter Number:** 17-2063 (dropdown), ABC Condominium - Doe Unit 123 (text)
- Hours:** 0.00 (text)
- Timekeeper:** DRC (dropdown), David Chenelle (text)
- Activity Code:** BAL (dropdown), 30 day letter (text)
- Time Ticket Type:** Radio buttons for Billable, Flat Charge (selected), No Charge, Non-Billable.
- Timer:** 00:00:00, Start, Reset buttons.
- Text:** A large text area with a yellow background containing the text: "Review of accounting and 30-day Notice of Lien letter to unit owner relative to balance due; related correspondences". A font size dropdown is set to 10.
- Ticket Value:** \$200.00 (text)
- Put Time Ticket on Hold:**
- Ticket Number:** (empty text field)
- Footer:** "Press F5 for Time Entry Abbreviation Codes and F7 to Spell Check", Previous, Next, Done, Cancel buttons.

We hope you enjoyed our brief overview of our Abacus System and how this software sets us apart and makes our Lien Enforcement Department the most efficient it can be!



# For further information, see our Staff to set up your free Q&A with P&A



- A personalized one hour informational law seminar.
- Meet at your business location or P & A will host you at our office with breakfast or lunch.
- We will review pending cases, discuss new challenges and update you on changing laws.
- Benefit from industry insight obtained from decades of experience representing more than 750 associations.