

Virtual Summer Bootcamp – Day 1

Tuesday, August 9th:

Attorney Workplace for Timekeepers

- The Attorney Workplace is the go-to place for attorneys to obtain information on client/matters as well as create and manage various daily activities. The training will cover Matter Information, Calendar Meetings/Tasks, Documents, Conflict Approvals, Time/Expense entry, and explain how to customize information being displayed on grids and preview panes.

Bank Reconciliations 101

- This webinar will include instructions on how to complete your firm's bank reconciliations, best practices for completing your reconciliations, trouble-shooting tips for when you cannot balance, and how to clean-up old outstanding items in your bank reconciliations.

Best Practices: Accounts Payable

- This webinar will cover best practices for managing your firm's accounts payable including the use of payment frequencies, setting up and taking discount percentages, cleaning up old unused vendors, and setting up vendors for 1099 tracking. This session will also cover options for attaching copies of vendor invoices or receipts to client expenses including the scanning functionality or manual entry.

Best Practices: Ebilling

- This webinar will cover best practices for managing your LEDES billing. The session will cover a deep dive into the challenges posed by eBilling, and how you can use Coyote Analytics to help mitigate those challenges by setting up compliance rules and eBill status tracking. The session will also cover common rejections and how to prevent them.

Financial Statement Formatting 101

- This webinar will cover common edits that your firm may want to make to your financial statements including using the GL categories and report groups to subtotal activity, make field alignment changes, font changes, paper orientation changes, and summarizing activity.

Virtual Summer Bootcamp – Day 2

Wednesday, August 10th:

Best Practices: Managing Rate Schedules (Including New Enhancements)

- This webinar will cover best practices for maintaining your firm's rate schedules and will include the new matter rate override functionality, scheduling reminders to review your rate schedules, and the ability to select the schedule you want to pull the rate from if there is not an exception (instead of just the standard rate schedule) through the use of the parent/child hierarchy.

Tracking Continuing Education (New Module)

- This webinar will cover the new module that will allow firms to keep track of the continuing education for employees. This module can be used for tracking CLE but can also be used by other employees with continuing education including CPAs or CLMs.

Tips, Tricks & Customizing Coyote

- This webinar will cover the best ways to customize your Coyote Analytics setup to meet your needs through the use of Personal Settings, search options, grid filters, etc. The session will also include lesser-known tips and tricks that will save you time and make your job easier.

Paperless Bill Editing for Bill Attorneys

- This webinar is intended for your billing attorneys/secretaries who will be working on completing bill edits electronically. The session will cover best practices for completing edits via the new worksheet or fees/expenses tabs.

Best Practices: Bill Collections

- This webinar will cover best practices for managing receivables and tracking collections. The session will demonstrate improved collection tracking and will cover the various features available to help track collections and reduce the firm's receivables through use of A/R Statements, collection tasks, and tracking collection through the Bill Collections Module in Coyote Analytics.

Virtual Summer Bootcamp – Day 3

Thursday, August 11th:

Bill Attorney Audit Modules (New Modules)

- This webinar will cover the new Bill Attorney Team Audit and Bill Attorney Rate Audit modules. The session will explain how these modules can be used and why you would want to use them.

Best Practices: Conflict Avoidance

- This webinar will include information on how to configure your firm's conflict mapping so you search the applicable fields that are relevant to your firm, how to setup and assign conflict roles, and how to run conflict searches in Coyote Analytics. This session will also cover the Conflict Approval functionality allowing you to electronically submit and approve conflicts searches to the appropriate parties in your firm.

Reporting to Manage your Firm

- This webinar is specifically for partners and accounting staff with a heavy focus on the essential reporting that they should be looking at and reviewing to ensure their firm is on track.

Bill Formatting 101

- This webinar will cover basic edits that your firm may want to make to your bill formats including font changes, field alignment changes, adding or removing task/activity codes, and more.

Using Excel for Advanced Reporting

- This webinar will cover instructions on how to use the report queries to export data to Excel and then complete advanced reporting using pivot tables, charts, etc. The webinar will cover some of the commonly used reports that you may want to use for advanced reporting.