



SMOKEBALL

Florida Bar
CLE Webinar

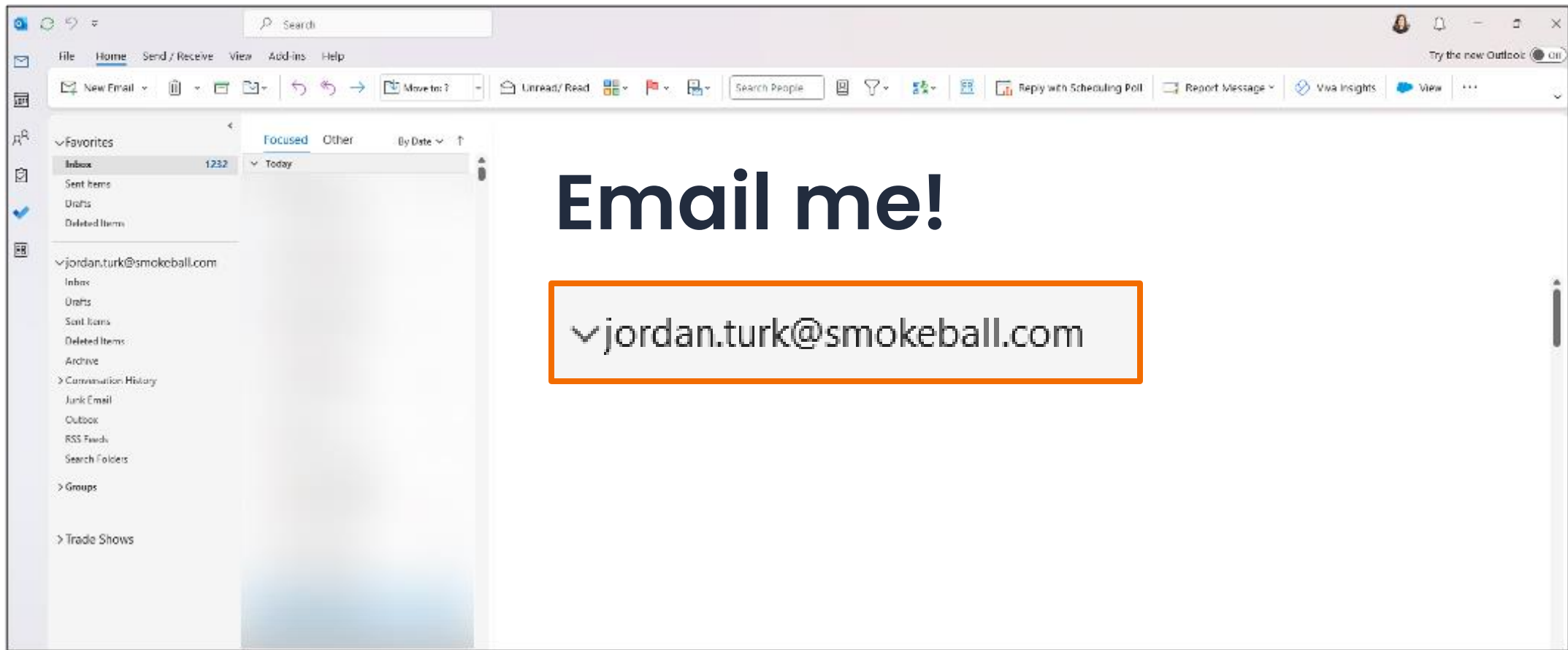
Mastering Microsoft Excel and Outlook: A Guide for Attorneys



Jordan Turk

Attorney & Legal Technology Advisor, Smokeball





Housekeeping



Ask Questions

Ask us questions using the **Q&A** (1)

Engage with attendees with **Chat** (2)



Post-webinar Survey

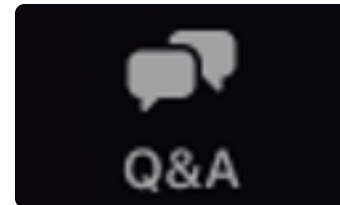
There will be a short post-webinar survey shared at the end of the presentation. We truly appreciate your feedback as it helps us improve our future CLE offerings.



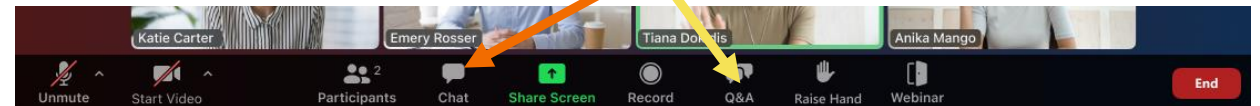
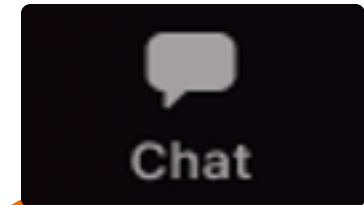
Recording & Slides

Recording and slides will be available after the presentation.

(1)



(2)





Jordan L. Turk

Attorney | Director of Education & Attorney Development, Smokeball

- JD, University of Arkansas School of Law
- BA, The University of Texas at Austin
- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success



The **#1** Legal Case Management Software for Law Firms

- Automatic time tracking - bill more accurately with a fraction of the effort
- Prebuilt workflows for specific practice areas
- Seamless integrations with Microsoft Word and Outlook
- Comes prebuilt with a library of 20k+ legal forms
- Identify business opportunities through powerful insights and reporting



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Scan QR Code to Redeem
Your Discount



AGENDA

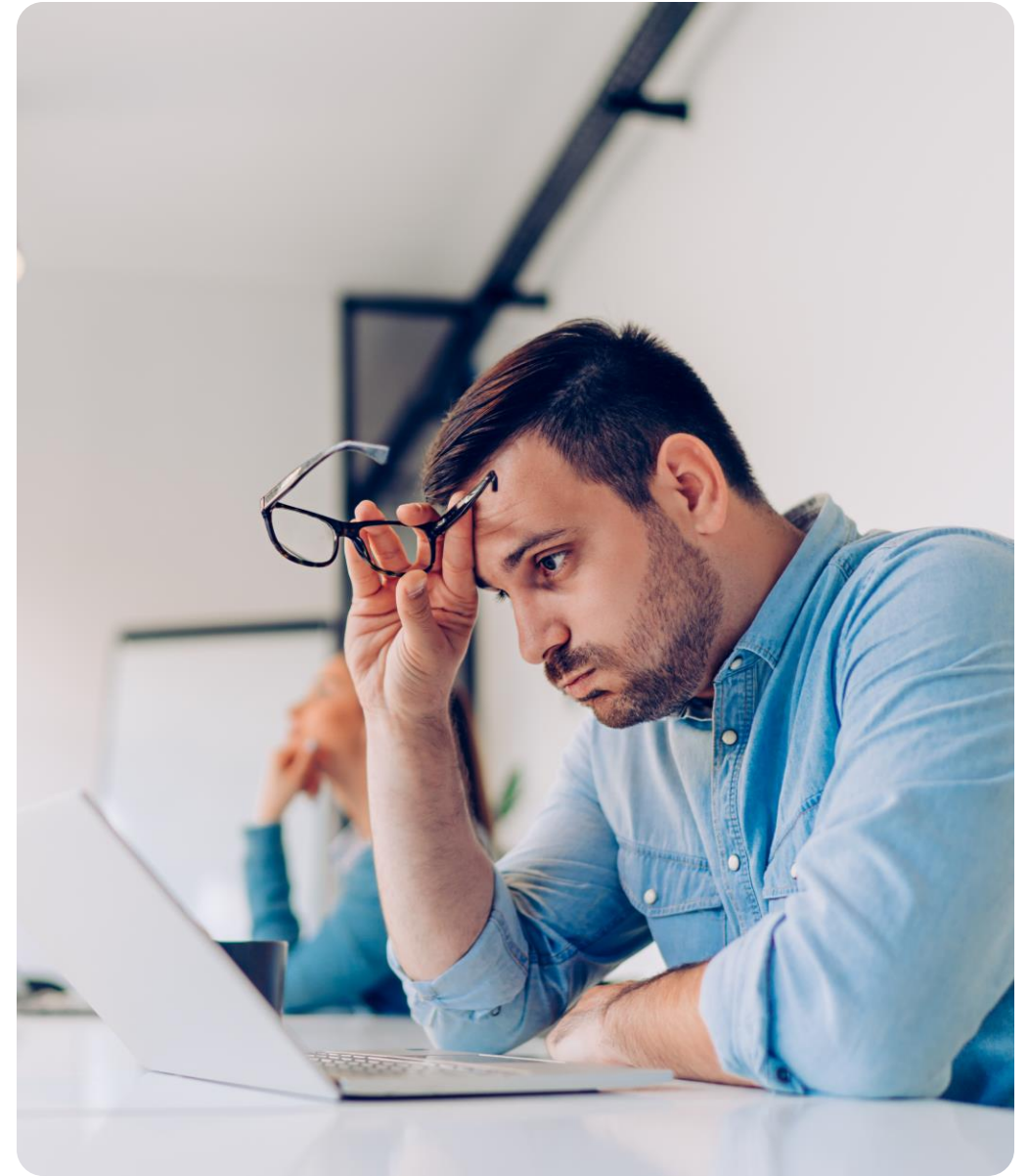
- **Part 1:** Overview and Core Functionality
- **Part 2:** Quick Access Toolbar
- **Part 3:** Keyboard Shortcuts in Outlook and Universal Microsoft Shortcuts
- **Part 4:** Useful Tips
- **Part 5:** Integrations into PMS and Other Applications
- **Part 6:** Excel Tips and Tricks



Overview and Core Functionality

What do Attorneys Use Excel For?

- Inventory and Appraisements (family law)
- Estate Planning
- Asset Inventory
- Crunching financial data
- Tracking billable hours
- Case management
- Conflict Checks



Inventory Example:

INVENTORY & PROPOSED DIVISION OF				VALUE AS OF	C/S	NET VALUE	PROPERTY TO HUSBAND	PROPERTY TO WIFE
CAUSE NUMBER _____; _____ the Judicial District Court of _____ County, Texas; D								
I. COMMUNITY ESTATE							%	\$
A. COMMUNITY ASSETS							%	\$
1. Real Property								
1.1	Street Address:							
	County of Location:							
	Description of Property:							
	Date of Purchase:							
	Purchase Price:							
	Current FMV:							
	<i>Less mortgage:</i>			0.00		0%	0.00	0%
1.1	Street Address:							
	County of Location:							
	Description of Property:							
	Date of Purchase:							
	Purchase Price:							
	Funds Used for Down Payment:							
	Separate Property:							
	Interest (Percentage):	#DIV/0!						
	Current FMV:							
	Less Separate Property:							
	Interest:	#DIV/0!						
	<i>Less mortgage:</i>			0.00		0%	0.00	0%
Subtotal: Real Property				0.00		0.00	0%	0.00
2. Cash & Financial Accounts								
2.1	Name of Financial Institution:							
	Account Number:							
	Name on Account:							
	Type of Account:							
	Current Account:							
	Balance:			0.00		0%	0.00	0%
	Name of Financial Institution:							

Page 1

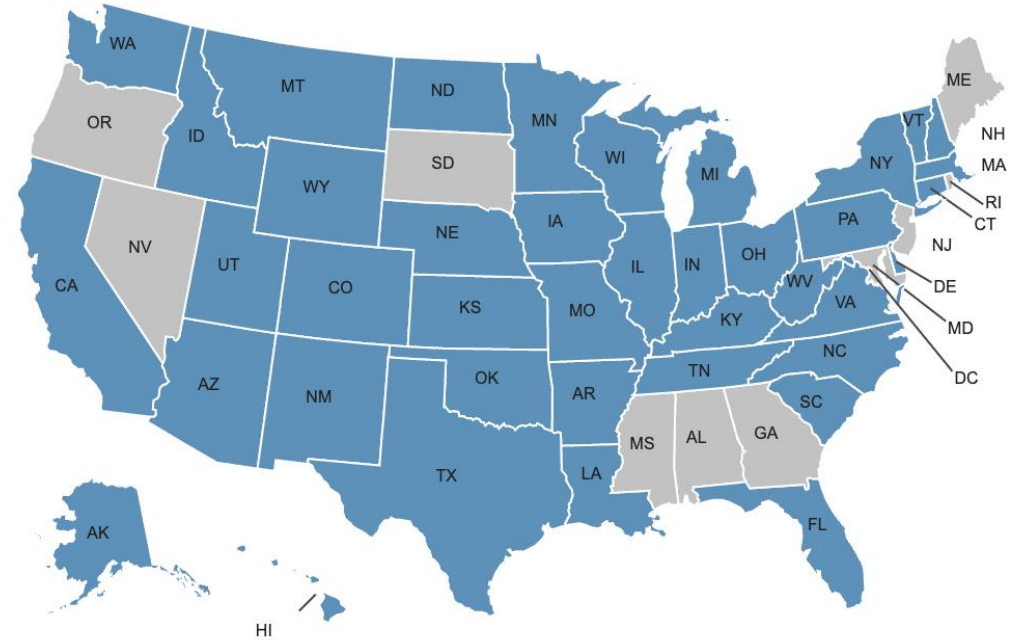
Ethical Considerations

Tech Competence:

40 States Have Adopted the Duty of Technology Competence

The duty to maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, **including the benefits and risks associated with relevant technology**, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.

(Emphasis added.)



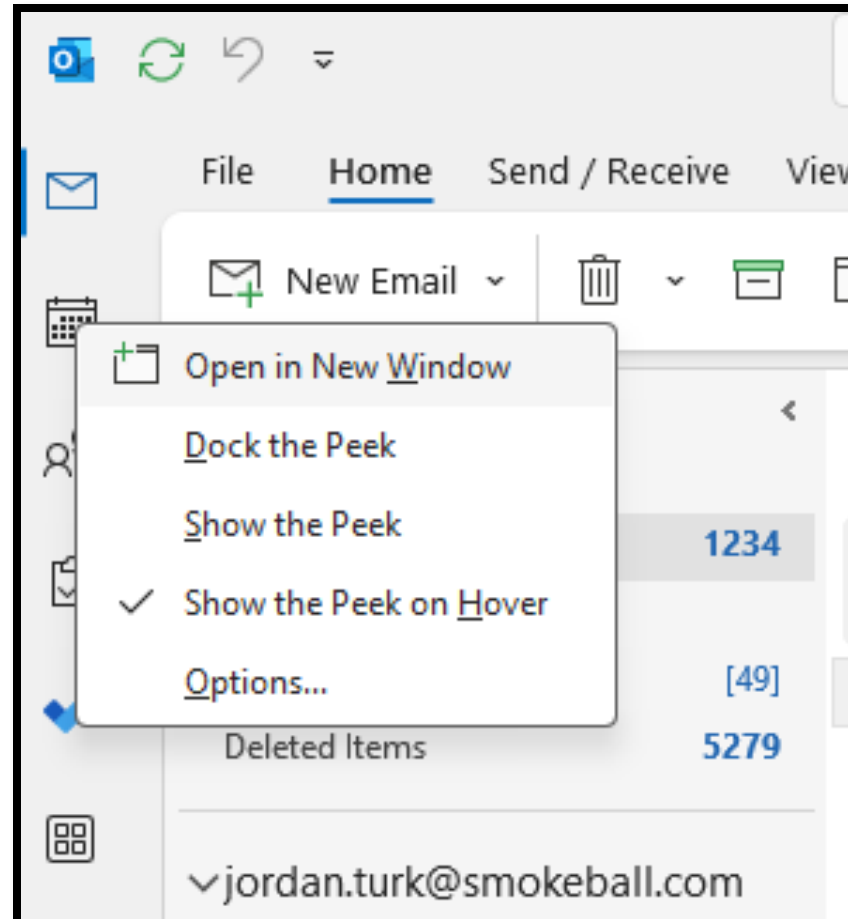


Why Should I Care as an Attorney?

- Attorneys need to know how their technology works, even something as basic as Outlook and Excel.
- Some attorneys (I've seen this especially in family law) outsource their Excel work, which to me is unacceptable. We have a duty to be competent in the tech we use, and Excel is **VITAL** to certain areas of law.
- Just because you know how to use the bare bones of the software doesn't mean you are utilizing it well. The goal is to give you the tools to work more efficiently so that your day is freed up to do substantive work on your cases.

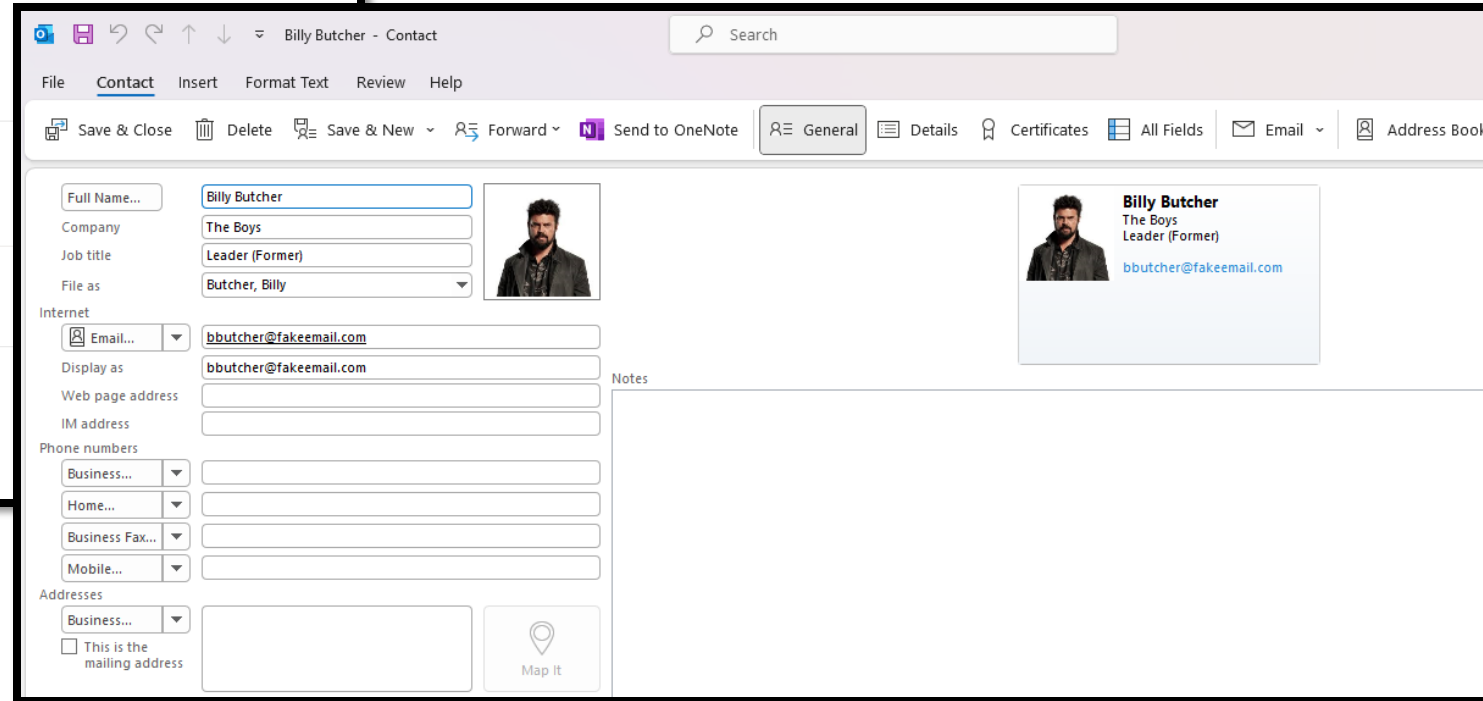
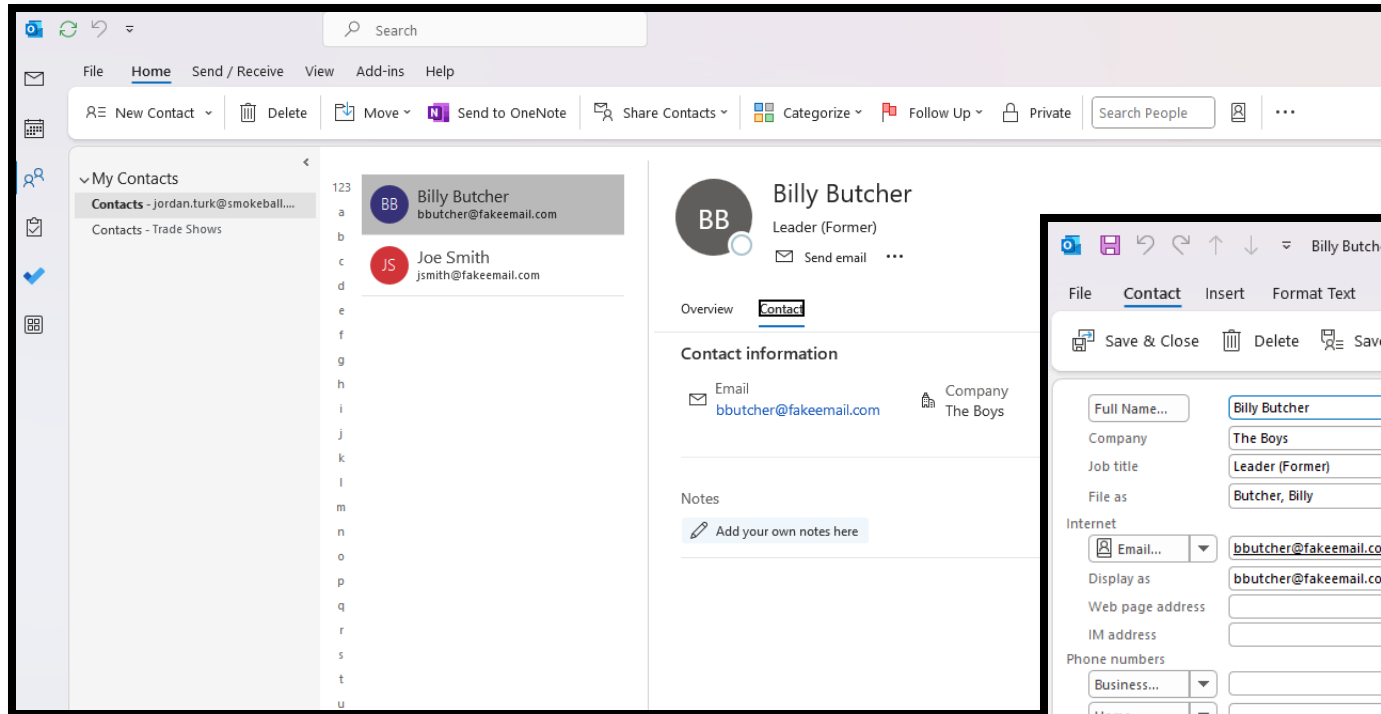
Open Calendar Into Separate Window/Tab

Right click on Calendar and select Open in New Window

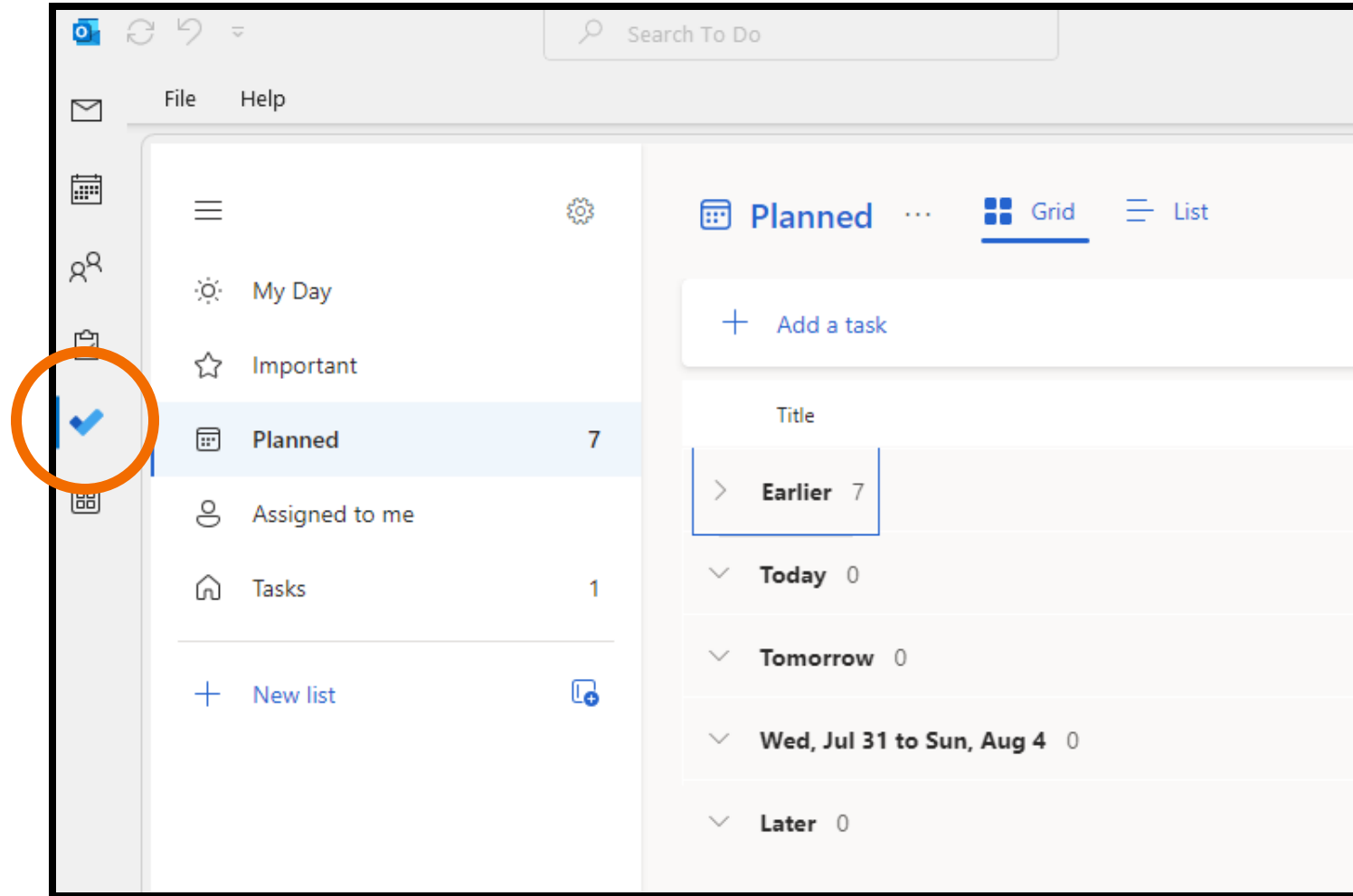


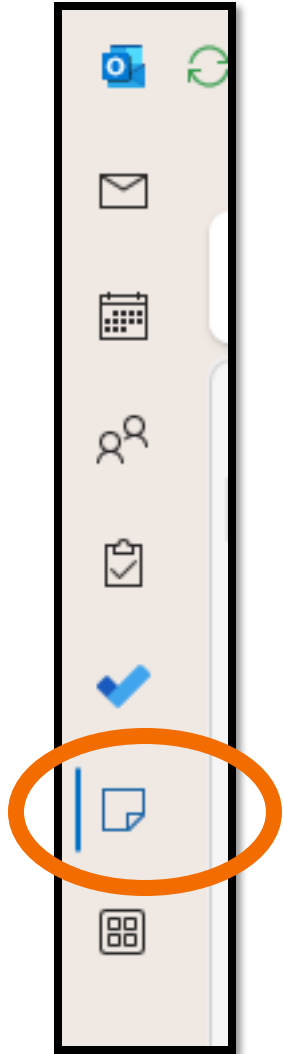
When I got emails from the Court or OC with scheduling dates, it was driving me crazy having to toggle between my calendar and mail – you can pop these out as separate boxes!

Add Detailed Info & Notes to Contacts



To Do Function





Notes Function

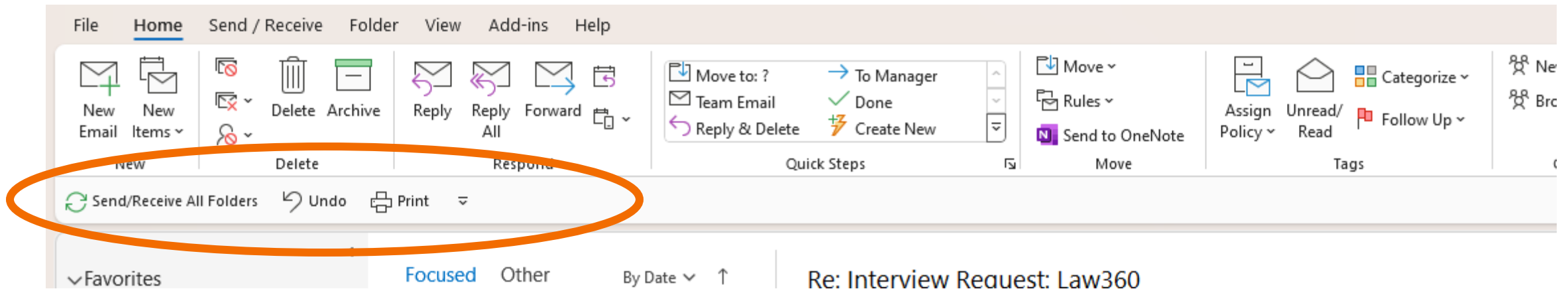
If you can't see it, click the bottom square icon and click Notes

In my opinion, better technology exists for note functionality, like OneNote or Evernote. It's clear that Microsoft kind of just tossed this feature in and the company doesn't spend time on upgrading it.



Quick Access Toolbar

You can change its positioning to make things more convenient:





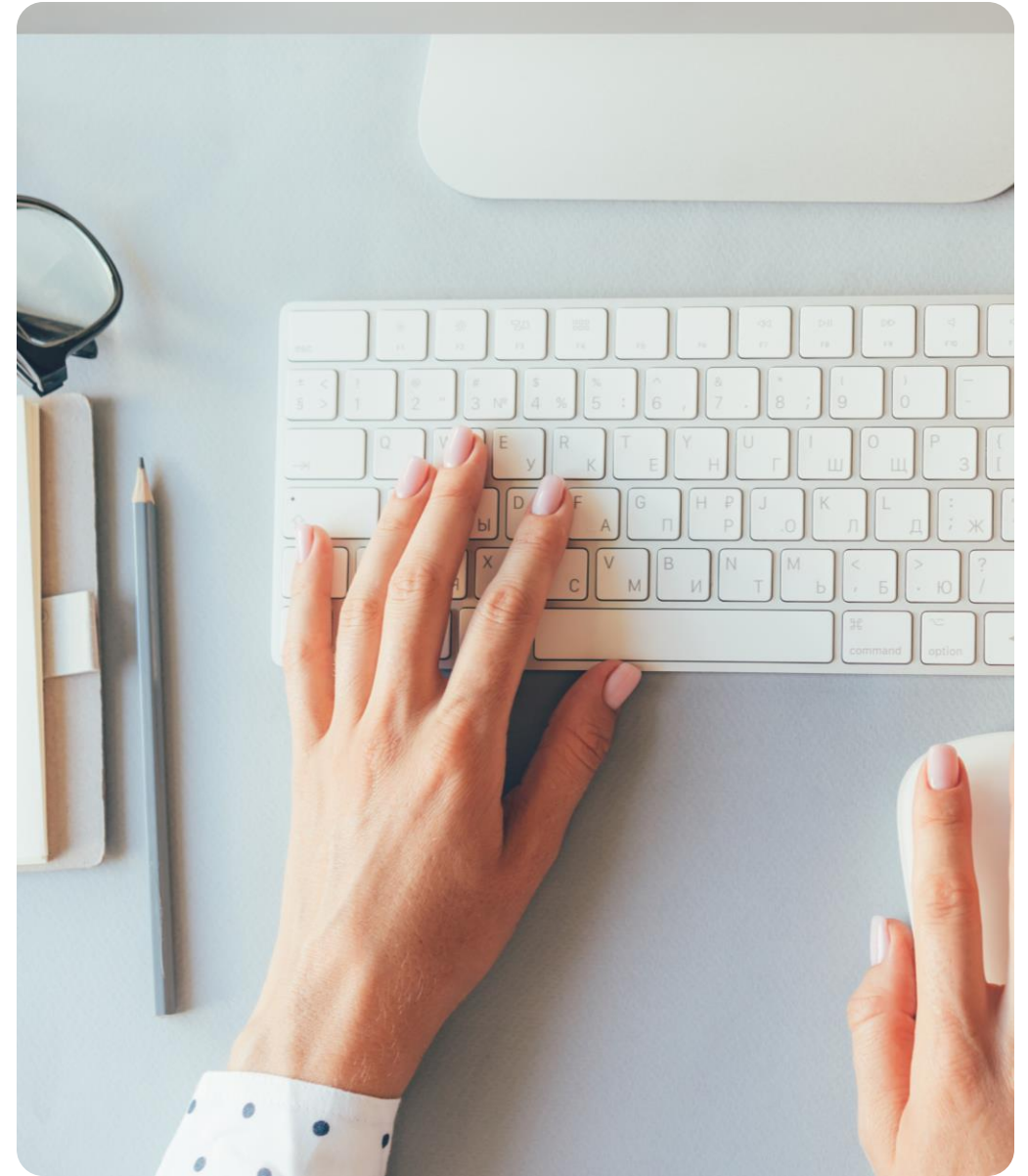
Keyboard Shortcuts



Outlook Keyboard Shortcuts

- CTRL + Enter = Send email
- CTRL + R = Reply
- CTRL + Shift + R = Reply all
- CTRL + N = New email or new calendar event
- Shift + Enter = Open email in new window
- Delete = Delete message or item
- CTRL + F = Forward
- CTRL + 2 = Go to Calendar

Get comfortable with these! The less you need to use your mouse, the better.





Universal Microsoft Keyboard Shortcuts

- Cut (CTRL + X), Copy (CTRL + C), and Paste (CTRL + V)
- CTRL + Z (undo)
- CTRL + Home/End
- CTRL + Click (highlights entire sentence)
- CTRL + Triple Click (highlights entire paragraph)
- CTRL + A (highlights everything)

Get comfortable with these! The less you need to use your mouse, the better.



Useful Tips

Useful Tips

- **Customize your text shortcuts:**
 - Ex. §, to get this: Open new email, Insert Ribbon -> Symbol -> More Symbols -> Autocorrect -> replace with key that you would like. I use (s) for this one.
- **Fixing uppercase autocorrect:**
 - File ribbon -> Options -> Mail -> Spelling and Autocorrect -> unclick Ignore Words in Uppercase
- **Turn off notification sounds:**
 - File ribbon -> Options -> Mail -> Message arrival -> make sure Play a sound is NOT checked off.
- **Rules:**
 - Home Ribbon -> Move tab -> Rules (useful for junk or filtering out mail that's not junk, or for moving a bunch of discovery emails from the client into a separate folder so that it doesn't clog your inbox)



Lawyer Mental Health Check: I had to turn off my Outlook notification sound (referenced above) because it was causing me anxiety every time I'd hear it. At 11pm, during weekends, on my vacation, etc. Set the boundaries you need to.

Calendar – Auto-Decline Conflicting Events

- Especially useful if your staff keeps double-booking you and you need that time (e.g., initial client consultations, hearing prep, etc.)
 - Calendar tab -> File -> Options -> Calendar -> Scroll all the way down -> click Auto Accept/Decline and update your preferences

Creating a Find Time Poll

An oft-overlooked feature! However, ridiculous move on Microsoft's part, in that now you can only vote if you have an Outlook account.

1. Choose an email to respond to or create a new email.
2. List attendees who are needed for the meeting in To and those who are optional in Cc.
3. Select Reply with meeting poll under the Home tab.
4. Choose the meeting options:
5. FindTime proposes ideal meeting times based on a review of the attendees' schedules (if any are available).
6. Pick a few times that are suitable for your meeting.
7. Enter the meeting location.
8. Toggle the ON/OFF switch under Poll Settings.
9. Select Insert to email. To invite attendees to the meeting and begin voting, choose Send.
10. A direct link to the voting website for your meeting will be sent to you.



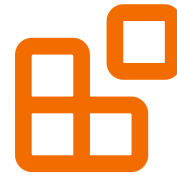
Once you send a find time poll, it will automatically block out those times on your calendar until a winner is chosen!

Read Receipts

- Words cannot describe my hatred for Read Receipts
- **YOU CAN DISABLE THESE!**
- File -> Options -> Mails -> Tracking -> Select Never send a read receipt



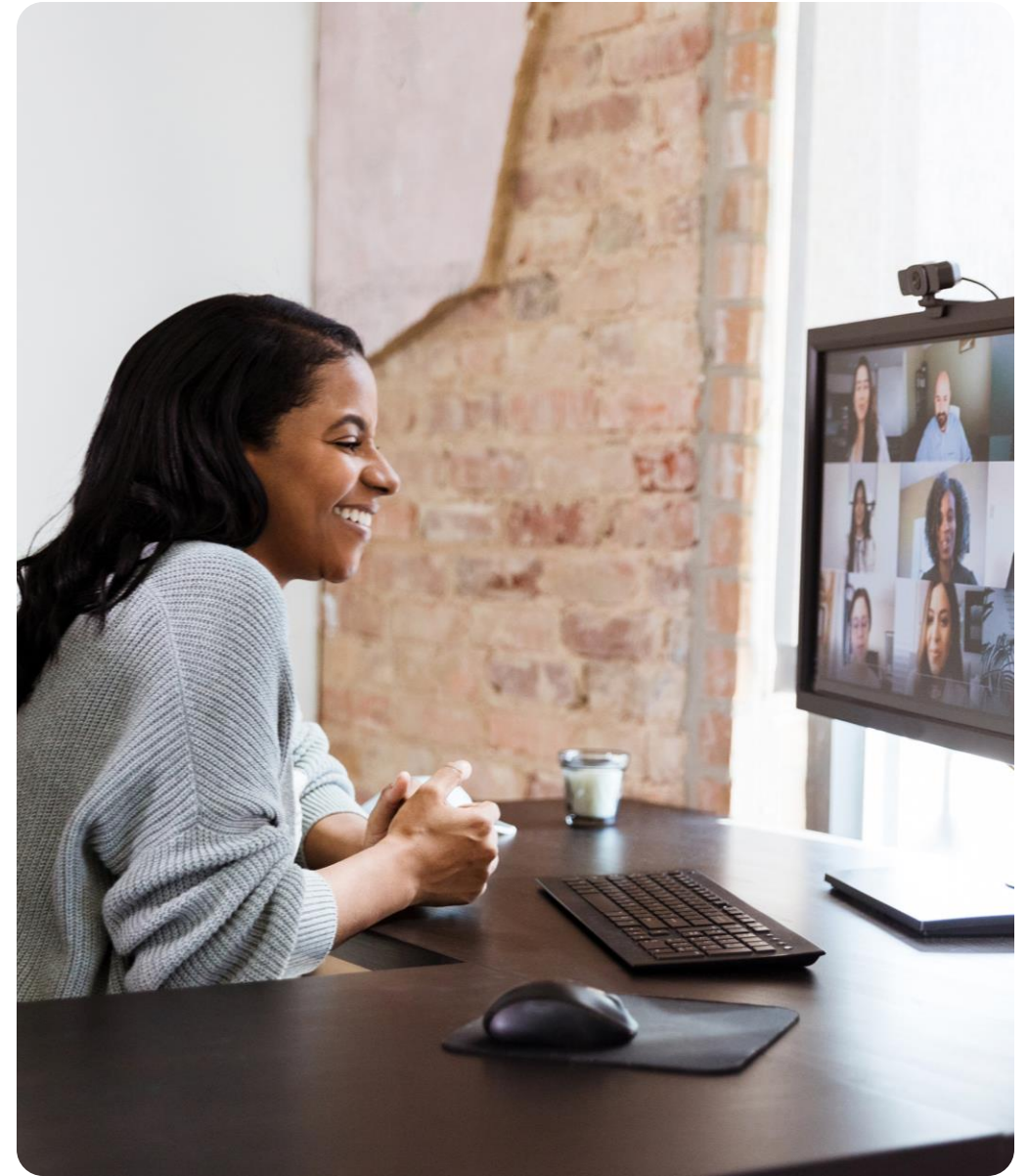
I used to have an opposing counsel who requested read receipts and to me, unless I have given you cause to use it, it's insulting and, more importantly, annoying.



Integrations

zoom

- First, install the Zoom plugin for Outlook
 - Calendar tab -> Home ribbon -> New Meeting. If your Zoom account is integrated, it will auto-populate the meeting info and Zoom details.
 - Can disable this if you want, but since most of my meetings are via Zoom, it's lovely.
 - **If you do remote consultations and meetings with clients/staff, this plugin is INVALUABLE**





LEGAL PRACTICE MANAGEMENT SOFTWARE

The screenshot displays the Microsoft Outlook interface. At the top, the window title is "Outlook - Message (HT...)". The ribbon shows the "Message" tab with various actions like Delete, Respond, All Apps, Quick Steps, Move, Tags, Editing, Immersive, Translate, Zoom, Reply with Scheduling Poll, and Report Message. The main content area shows an email from Jordan Turk to Jordan Turk, dated Mon 7/29/2024 2:56 PM, with an attachment "IMG_2027.jpeg" (403 KB). Below the email, there is a link to "Get Outlook for iOS". At the bottom of the Outlook window, a taskbar shows the SMOKEBALL logo, the text "Frakes, Quentin | Frakes, Janine - Estate Planning - Frakes, Quentin | Frakes, Janine - ...", and a "VIEW MATTER" button with a close icon. This taskbar area is circled in orange.



LEGAL PRACTICE MANAGEMENT SOFTWARE

Quentin Frakes | Janine Frakes
2024-06-024 - Estate Planning

OPEN

FILE MATTER INTAKE EMAILS MEMOS EVENTS TASKS MESSAGES ACTIVITY TIME & EXPENSES ARCHIE

Archie Draft Blank Letter Caption Forms & Templates Memo Message Email Import Scan Event Task Court Rules Phone Message Activity

MATTER DETAILS

Info 2024-06-024
Client 1 Quentin John Frakes
Client 2 Janine Ann Frakes
Matter Type Estate Planning
Estate Details 1 Estate plan for: Quentin John Frakes
Estate Details 2 Estate plan for: Janine Ann Frakes
Trust The Frakes Family Trust

ALL FILES FAVORITES DOCUMENTS MESSAGES EMAILS

Documents

Name	Status	To	From	Date modified	Date created	Size	Staff
Outlook				7/29/2024	7/29/2024	171 KB	JT
More Information Needed		Jordan Turk	jordan.turk@smokeball.com	7/29/2024	7/29/2024	26.5 KB	JT
IMG_2027				7/29/2024	7/29/2024	383 KB	JT
Estate Planning - Trust - Client 2				6/6/2024	6/5/2024	54.8 KB	HS
Estate Planning - Trust - Client 1				6/6/2024	6/5/2024	54.6 KB	HS
Estate Planning - Living Will - Client 2				6/6/2024	6/5/2024	30.2 KB	HS
Estate Planning - Living Will - Client 1				6/6/2024	6/5/2024	30.2 KB	HS
Engagement Letter and Fee Arrangement - Quentin John Frakes and 1 other				7/3/2024	7/3/2024	30.5 KB	NK
Certification of Trust				7/2/2024	7/2/2024	249 KB	NK

WIDGETS TIMELINE

NEXT STEP

7/29/2024 Jordan Turk

SAVE

CONTACT DETAILS

Janine Ann Frakes
EpBasicSpouse
Home (773) 111-2221
Cell (773) 111-3333
Email janine@fakeemail.com
Address 10138 Rawlins Avenue
McHenry, IL 60050
Date of Birth 4/16/1975 (Age: 49 years)
Create Letter View Details Copy Details

Quentin John Frakes
EpBasicSpouse
Home (773) 111-2220
Work (773) 111-2221
Cell (773) 111-2222
Email quentin@fakeemail.com
Address 10138 Rawlins Avenue
McHenry, IL 60050
Date of Birth 12/5/1972 (Age: 51 years)
Create Letter View Details Copy Details

Last refreshed at 7/29/2024 3:48:04 PM - 9 files 0 folders

Uploads Downloads & Exports

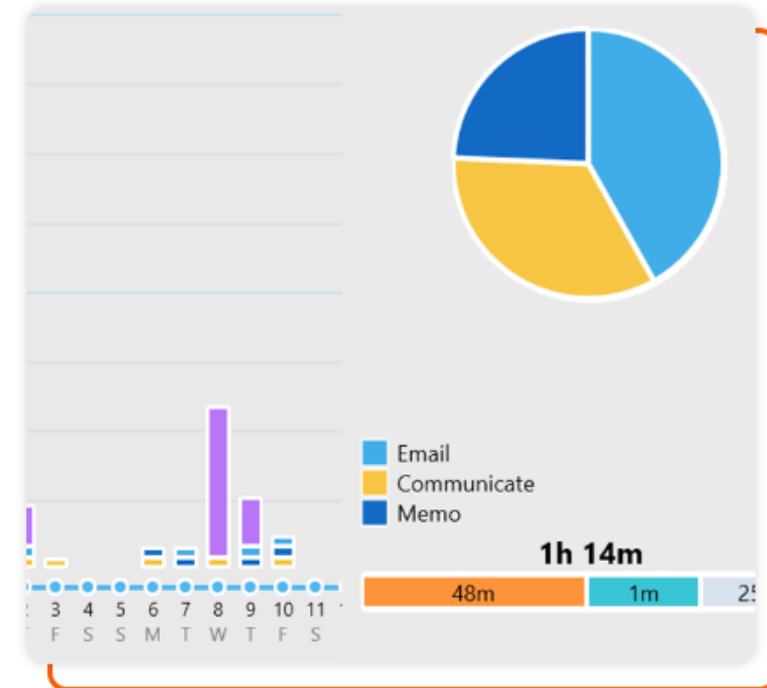




LEGAL PRACTICE MANAGEMENT SOFTWARE

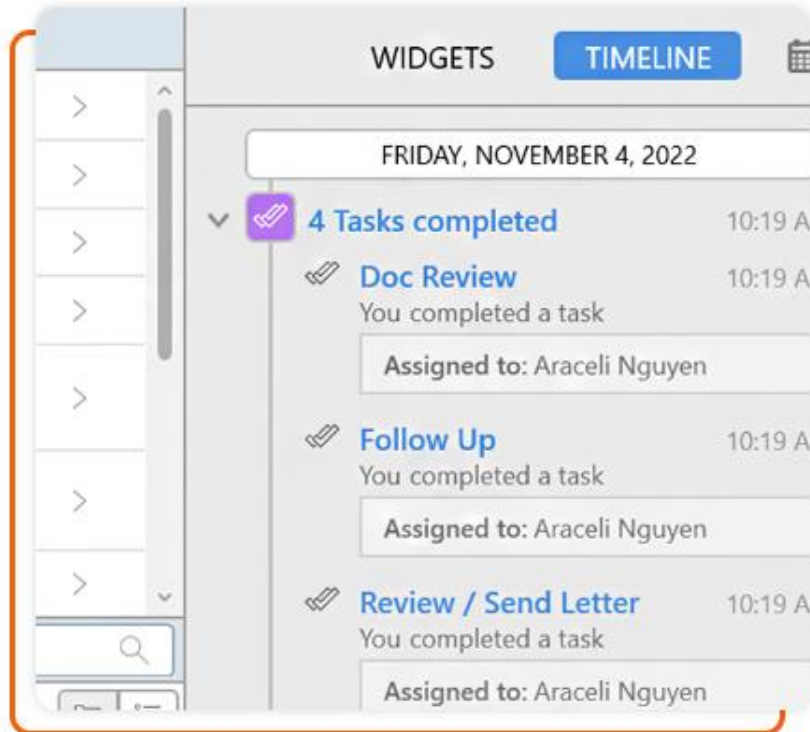
Automatically track time working on emails

Smokeball's Outlook email integration includes our fully integrated, built-in **automatic time tracking** for lawyers. Capture all the time you spend on back-and-forth emails without guesswork or setting a separate timer.





LEGAL PRACTICE MANAGEMENT SOFTWARE



Effortlessly gain a timeline of your communications

Need to see when you placed a certain phone call or sent an important message? Smokeball knows. Because every communication is searchable and automatically tagged to the related matter, you'll track down conversations in seconds. Smokeball's Microsoft Outlook email integration includes all messages sent in a chain, so you'll never need to forward or BCC your colleagues.



Excel Tips and Tricks

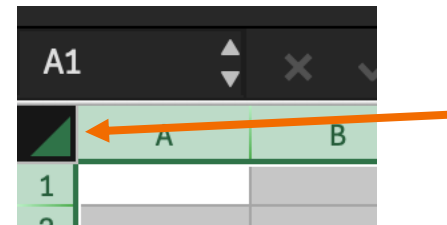
Tips & Tricks: Visibility

- **Being able to actually see the cells**
 - The standard font size is 11/12, which looks a lot tinier in Excel than in Word.
 - You can Zoom in (bottom right-hand corner of doc) to 150%. Or hold CTRL+A and then change the text to a different size once everything is highlighted.
- **Column widths:**
 - You can go between the boundaries and drag it yourself; OR
 - Hold your cursor between the columns. You'll see a double arrow, and if you double click, it will auto expand the column to accommodate your content.

PRO TIP

Don't want to go column by column to expand the width?

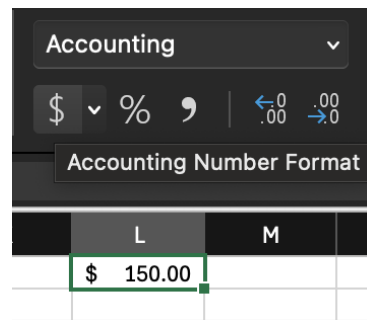
Click that box in the upper lefthand corner of the doc, which selects the entire doc. Then double click in-between the columns like before – this time will resize all the columns at once



Tips & Tricks

Let's say you have a **trust account report**, and you want specific columns to be recognized as numbers instead of dates, etc.

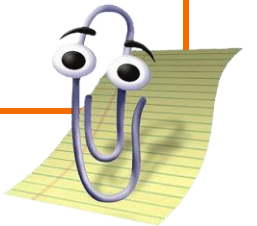
- Highlight the relevant columns, then find the \$ icon (Home ribbon → Number tab → \$)
- The dollar sign will be added to these columns now



PRO TIP

The shift buttons let you select multiple Excel rows/columns/cells

Want to select non-contiguous columns? Or just random cells? Hold down CTRL and click on what you want.



Tips & Tricks: Functions

SUM Function

Go to the bottom of a column. Type “Total” into column to the left. Then in column to the right, type =SUM (a menu will pop up), stick with SUM, and then type in range with ()).

OR you can drag your mouse across what you want.

Average Function

=AVERAGE(range)

Min Value

=MIN(range)

Maximum Value

=MAX(range)

Avoids the issue of having to look through hundreds of pages of excel data.

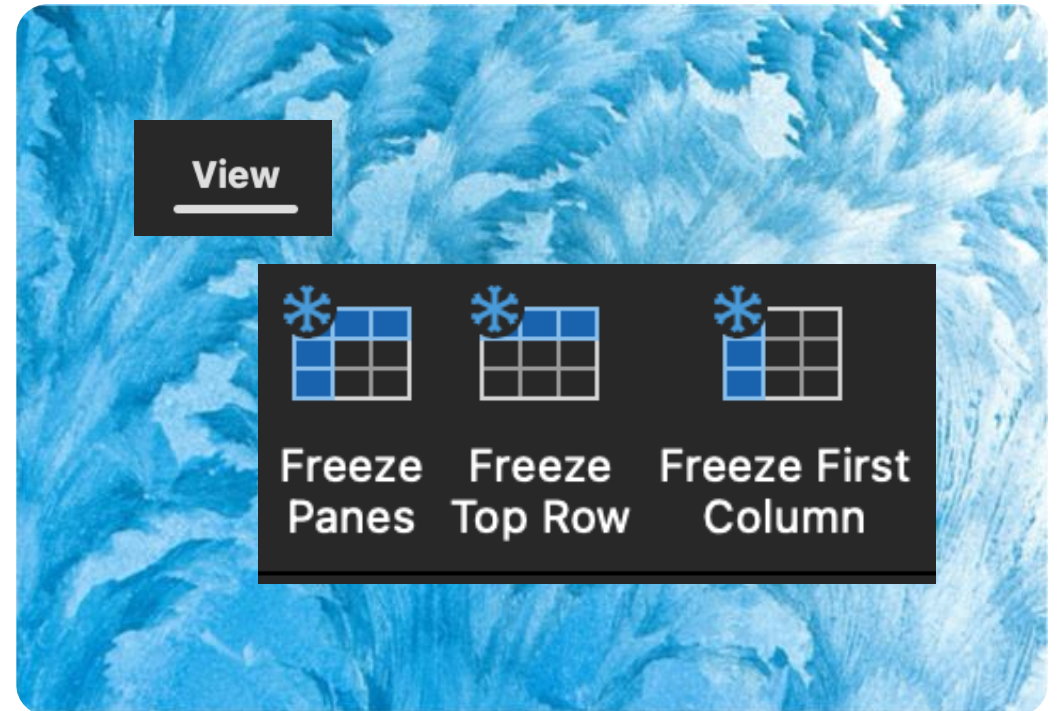
Tips & Tricks: Freezing Cells

Select what row/column you want to freeze.

View ribbon → freeze panes/top row/first column

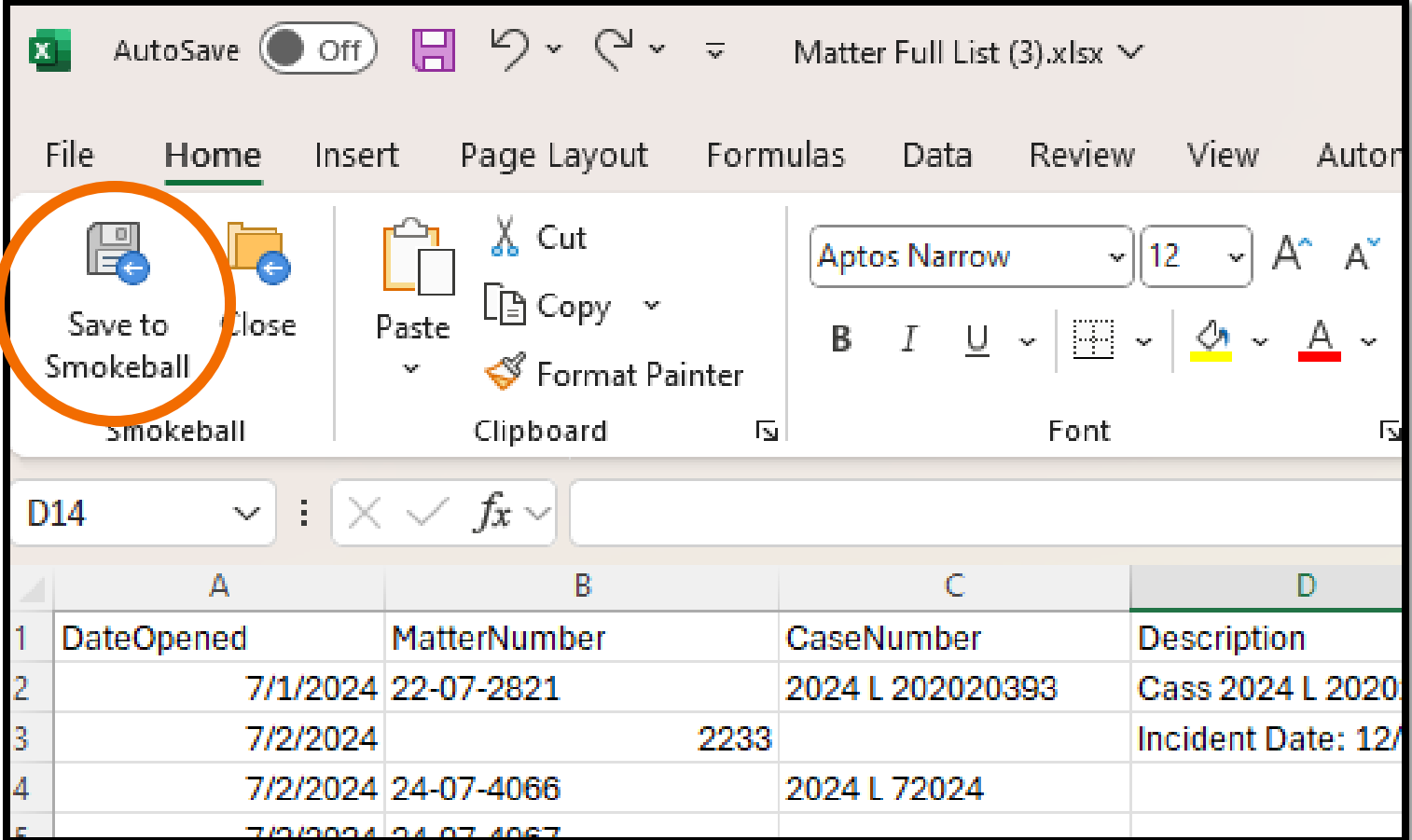
PRO TIP

I like to freeze and bold the top row/column.



SMOKEBALL. Integrations

**Seamlessly
save it down to
your case file**



The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The 'Save to Smokeball' button is circled in orange. The spreadsheet below shows a table with columns A, B, C, and D.

	A	B	C	D
1	DateOpened	MatterNumber	CaseNumber	Description
2	7/1/2024	22-07-2821	2024 L 202020393	Cass 2024 L 2020
3	7/2/2024	2233		Incident Date: 12/
4	7/2/2024	24-07-4066	2024 L 72024	
5	7/2/2024	24-07-4067		

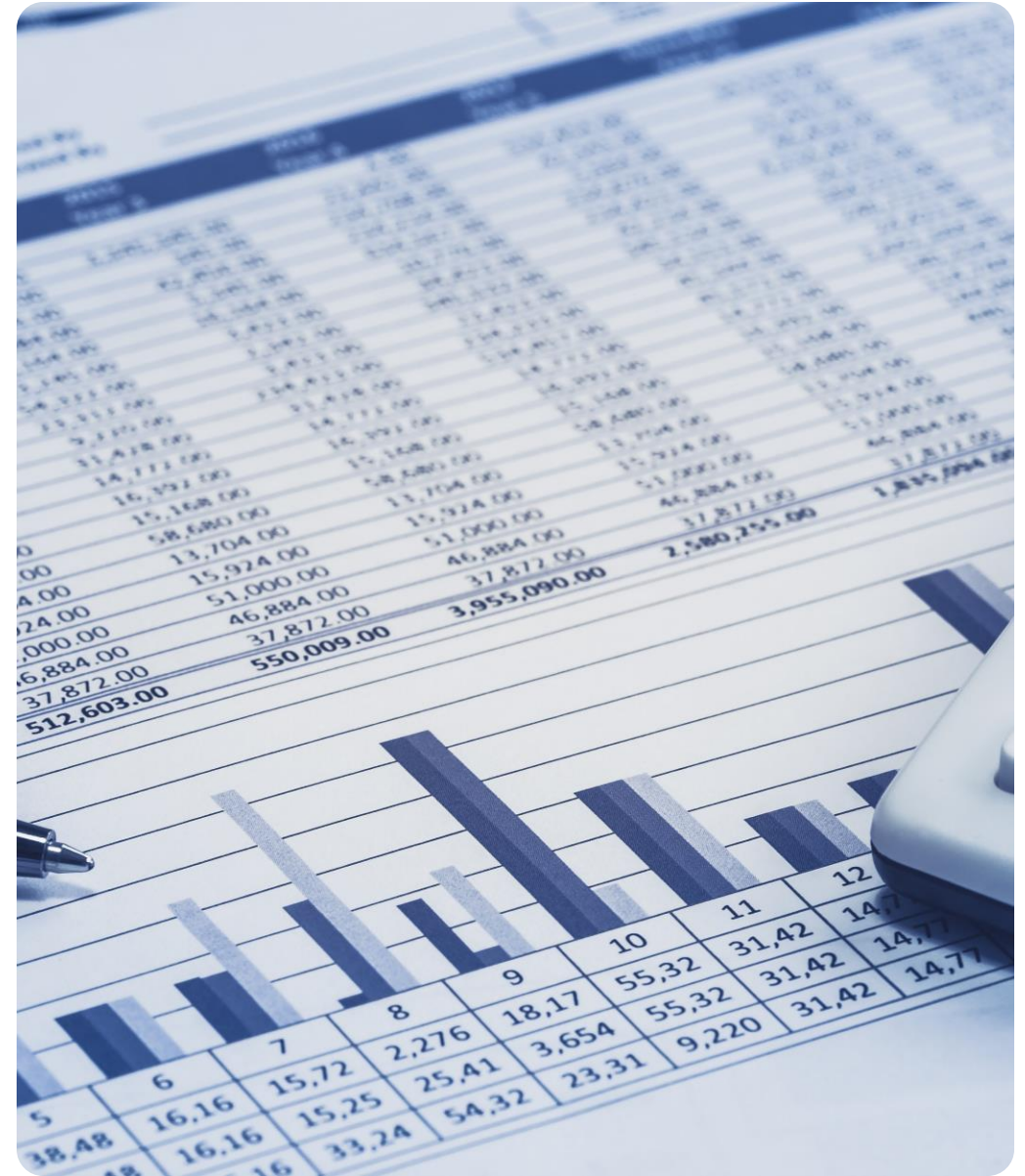


Attorney or Staff Timesheets

- Easy to assemble in Excel, especially now that you know the SUM function!
- Easier way to track your time if you don't have technology to help you
- Can add in other functions, such as multiplying by your hourly rate, to track projected revenue
- Have the Excel sheet always open on your computer and keep adding to it during your workday.

Reporting and Crunching Numbers for Your Firm

- Most reports that you pull will come to you as an Excel/CSV file
- Becoming more comfortable with Excel means that you get more comfortable with your law firm data, so you can start creating things like pivot tables and get acquainted with data forecasting (e.g., my spreadsheet says I made \$X this year, and I want to make 20% more next year, so I put that into my Excel doc which runs the numbers for me)





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- Prebuilt workflows for specific practice areas
- Seamless integrations with Microsoft Word and Outlook
- Comes prebuilt with a library of 20k+ legal forms
- Identify business opportunities through powerful insights and reporting



Would you like to learn more about how Smokeball can work for your firm?

If **yes**, one of our law firm specialists will follow up.



Yes



Not at this
time



I'm already a
Smokeball
user

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Scan QR Code to Redeem
Your Discount



Questions?



Florida Bar CLE Information

CLE Credits:

- General – 1.0 hour
- Technology – 1.0 hour

Additional Information:

The course number for today's webinar is 8898. This webinar has been approved by The Florida Bar Continuing Legal Education Department for 1.0 hour of General CLE credit, including 1.0 hour of Technology CLE credit. Please self-report this course in the member portal.



Thanks for joining!



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