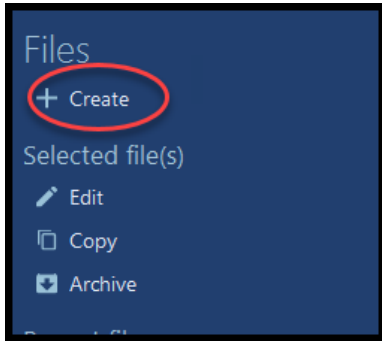




ACL5

FILE OPENING MADE EASY



From the Main Page, click **Create**.

The form is divided into several sections: File Information, Proceeding, File Participants, Court, and Proceeding Commenced at. Each field is numbered from 1 to 11 to indicate the sequence of data entry.

- 1** Enter the Firm File Number
- 2** Enter the File Name
- 3** Select the Language Preference, if enabled
- 4** Select the Practice Area
- 5** Select the File Type
- 6** Select the Proceeding Type
- 7** Select the Primary Lawyer/Overseeing Lawyer
- 8** Select any Additional Firm Members
- 9** Select the Level of Court
- 10** Type or search for the name of the court. The proceeding commenced at will automatically fill with the court office selected
- 11** Enter the Court File Number



For assistance contact:

ACL Support

416.363.1650 x100 / 1.800.340.3234 x100

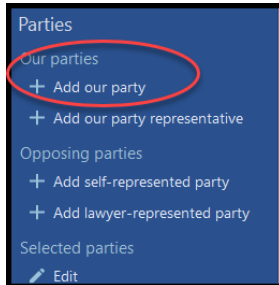
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Navigate to the **Parties** page to add in the firm's party and the opposing party/parties.

To add **Our Client/Contact**

Click **Add our party**:

A screenshot of the 'Add Our Party' form. The form has three tabs: 'Primary Information', 'Contact Details', and 'Additional Notes'. The 'Primary Information' tab is active. The form is divided into sections: 'Party Information', 'Personal Details', and 'Additional Information'. Red callouts with numbers 1 through 8 point to specific fields: 1 points to the 'Party role' dropdown, 2 points to the 'First name', 'Middle name', and 'Last name' text boxes, 3 points to the 'Date of birth' date picker, 'Social insurance no.', and 'Health card no.' text boxes, 4 points to the 'Additional party information' dropdown, 5 points to the 'Representation' dropdown, 6 points to the 'Contact Details' tab, 7 points to the 'Add party to firm address book' radio buttons, and 8 points to the 'Add Another', 'OK', and 'Cancel' buttons at the bottom right.

- 1 Click the drop down to choose the **Party Role** and **Party Type**.
- 2 Enter the **First name**, **Middle name** and **Last name** or the **Organization Name** and **Representative** (as needed) if the party is a corporation.

A screenshot of the 'Organization and Representatives' section of the form. The 'Party type' dropdown is set to 'Corporation'. The 'Organization name' text box is highlighted with a red box and a red callout '2'. Below the text box are buttons for '+ Add Representative', 'Edit', and 'Delete'. Below these buttons is a table with columns: 'Honorific', 'Name', 'Job Title', 'Tel No.', 'Mobile No.', 'Fax No.', and 'E-mail'. The table is currently empty.

- 3 Enter the **Date of Birth**, **Social Insurance Number** and **Health Card No.** if needed.
- 4 Add in any **Additional Party Information** (i.e. also known as) if needed. Ensure that the **Name for Style of Cause** is correct. Review **Name elsewhere on court documents and letters**.
- 5 Click **Contact Details** to enter in the party's address and phone number if known.
- 6 Click **Additional Notes** to enter notes regarding the party.
- 7 The party will automatically be added to the **Client and Contact Database**. Click **No** if the party should not be added to the database.
- 8 Click **Add Another/OK/Cancel**

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Self represented parties

To add a self represented party, click **Add self-represented party** and repeat steps 1 to 5 above.

Lawyer represented parties

To add a lawyer represented party, click **Add lawyer represented party**.

The screenshot shows a 'Firm Information' dialog box with the following sections and callouts:

- 1**: Points to the 'Firm' text input field.
- 2**: Points to a search field on the right side of the 'Firm' field.
- 3**: Points to the '+ Add Lawyer' button.
- 4**: Points to the '+ Add Party' button in the 'Represented Parties' section.
- 5**: Points to the 'OK' button at the bottom right.

The 'Firm Information' section includes a 'File reference' field and a checked 'Include on Service List' checkbox. The 'Lawyers' section has a table with columns 'Honorific', 'Name', and 'Appears on Court Documents'. The 'Represented Parties' section has a table with columns 'Role' and 'Name'.

- 1** Type the name of the firm within the **Firm** field. If the firm is contained in our database, the firm name will appear within the search field. Select the firm. If the firm has not been added to the database, click the **Plus** icon to add in the firm.
- 2** Review the firm's contact details.
- 3** Click Add Lawyer to choose a lawyer from the rolodex, or to add a new lawyer.
- 4** Click Add Party to add in the party/parties the firm represents.
- 5** Click OK once complete.

NOTE: Review the **Order Parties**, **Style of Cause**, and **Service Details**, tabs to ensure all information is correct.

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