

Opening a New Case in Zenias

Get Case# Search for Client Close Case New Case

Case# 1942 Court
 Closed# Appeal-Domestic Docket
 D/Closed Client Folder D/Filing
 D/Open 04/09/13 Mind Map Edit Record D/LastOrder
 D/CoA Stat Send Multiple Status
 Add Actor Send to One D/LastAction 04/12/13
 Get Actor's Info Check Contacts Log Time Add Deadline

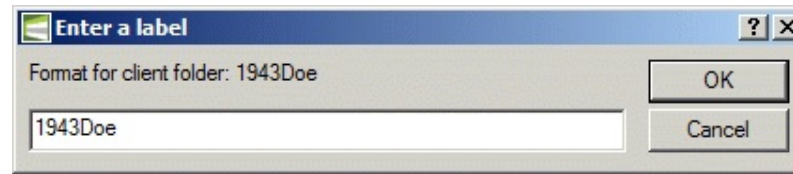
Set	Role	Name	Contact Info: Phone1 Phone2 Phone3 Email
1	CLI/DEF		
1	REF		

Deadlines
 Due Event
 04/12/13 Await

These steps could be done manually, but to automate the process, click New Case.

	A	B	C	D	E	F	G	H	I	J	
1	Case#	Closed#	D/Closed	Client	Type	D/Open	D/CoA	Stat	D/LastAxn	Status	Ct
560	1940	0.000			Appeal-Med M	03/18/13			03/18/13	Consult	
561	1941	0.000			Appeal-Fraud	03/19/13			03/19/13	Consult	
562	1942	0.000			Appeal-Domes	04/09/13			04/12/13		
563	1943	0.000				04/13/13			04/13/13		
564											
565											

After an instruction message, you enter data on the case on a new line at the bottom of the Cases database. Press Enter when finished.



After clicking Enter, a dialog box appears in which to enter the name of the folder in which to store files on this case.

1. A suggested name (here, 1943Doe) is given. Beginning the folder with the case# allows Zenas to file and retrieve files automatically. The rest of the folder should be helpful to the user.
2. Type in the name you select and press OK.
3. Zenas handles the remaining tasks, gives a reminder about other tasks to perform, and displays the new case.

The screenshot shows a software interface for managing legal cases. At the top, there are buttons for 'Get Case#', 'Search for Client', 'Close Case', and 'New Case'. The main area contains several input fields and buttons:

- Case#**: 1943
- Closed#**: (empty)
- D/Closed**: (empty)
- Client Folder**: (empty)
- D/Open**: 04/13/13
- D/CoA**: (empty)
- Stat**: (empty)
- Status**: (empty)
- D/LastAction**: 04/13/13
- Log Time**: (empty)
- Hourly Rate or Fee**: (empty)
- Get Bill**: (button)
- All Work**: (button)
- > Case Diary**: (button)
- > Deadline Logs**: (button)

At the bottom, there is a table with columns for 'Set', 'Role', and 'Name'. A red arrow points to the 'Name' column header. To the right of the table is a section for 'Deadlines' with columns for 'Due' and 'Event'. A red arrow points to the 'Add Deadline' button above this section.

The information just entered now appears on the CaseView screen. The user would often add Actors and Deadlines at this time.