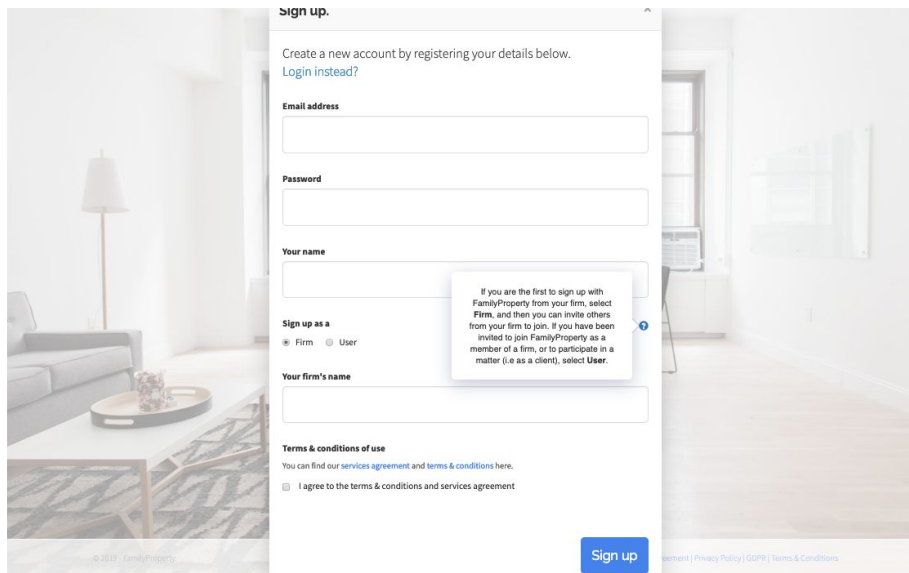# Quick Start Guide

Thanks for trying out FamilyProperty! We've put together this quick start guide to help you get up and running as quickly as possible.

Step 1: Signing up for FamilyProperty

You can sign up for FamilyProperty at https://app.familyproperty.com.au/login.html

Click on the **"Sign up"** link and complete the form, selecting to sign up as a:

>   *Firm* - If you are the first person to sign up from your firm, choose this option to create your firm's account within FamilyProperty. You will then be able to invite other people within or outside your firm to join.
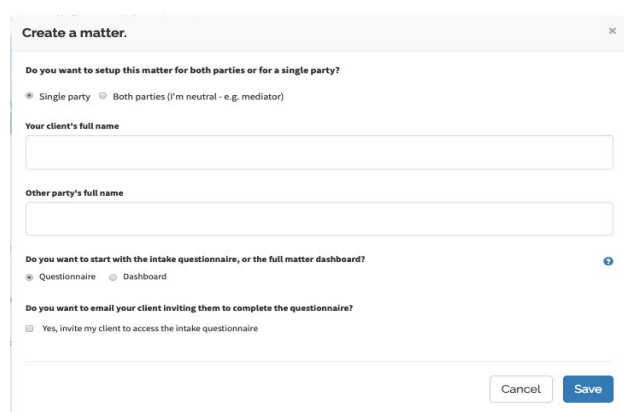
>   *User* - Select this option if you have received an email from your firm inviting you to join.

Once you have logged into FamilyProperty you be presented with the "My Matters" screen which is the Homepage. This is where you can create new matters, and access existing matters that you may have created or have been provided access to.
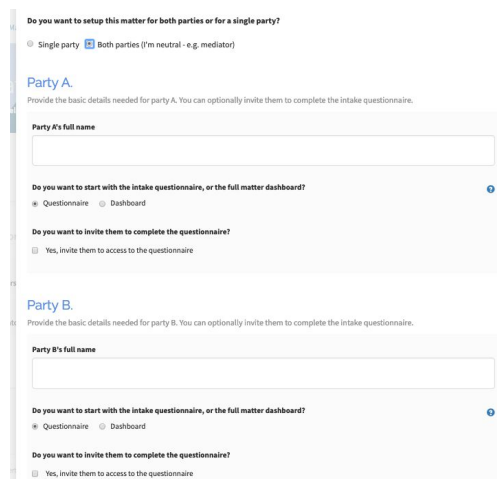
Step 2: Creating a matter

From the "My Matters" screen, click on the big "Create a matter" button. A new window will appear. There are two ways you can set up a new matter:

- As a **single party** representative (such as a lawyer) - gives you access to only one side of the matter, however you can populate information for the other party, allowing you to highlight and compare proposals.

- As a **neutral** (such as a mediator) - gives you access to both sides of a matter where you may invite both parties to complete the intake questionnaire and switch between the dashboard of each of the parties. There is also a neutral balance sheet where you can model and compare proposals.
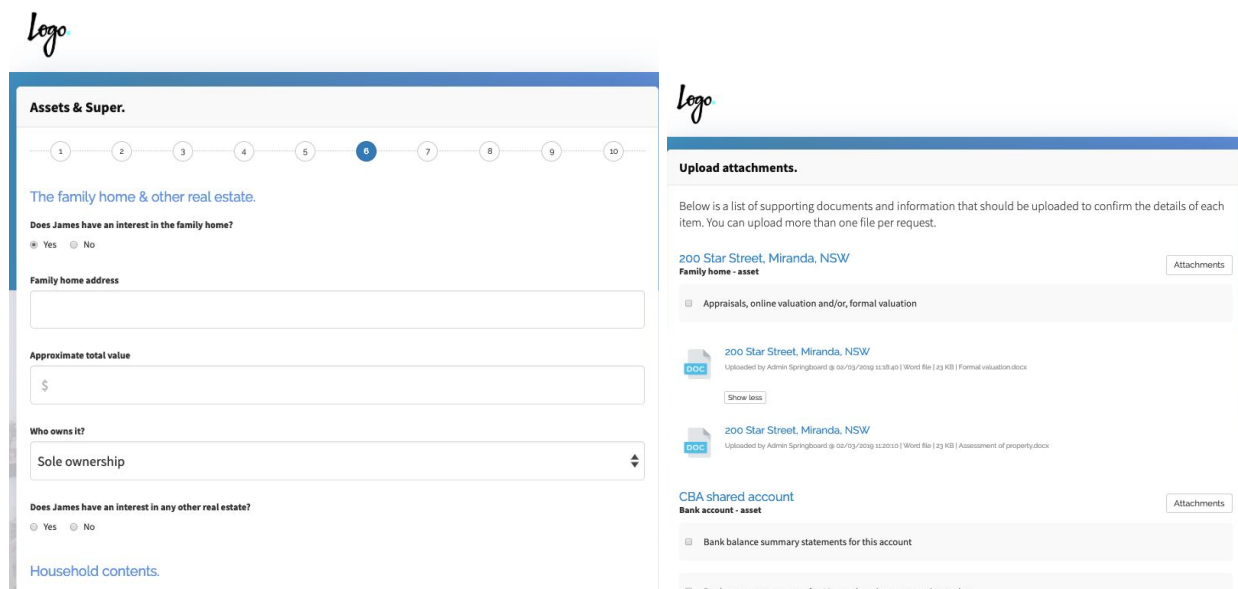
Step 3: Questionnaire & Dashboard Modes

Select which mode you would like to start the matter:

- **Questionnaire**; or
- **Dashboard**.

Questionnaire:

The **questionnaire** is included as part of your annual subscription. It is a client friendly ten-step intake form and document portal that you can use to efficiently populate the information for a client. Either complete this on your client's behalf or invite your client(s) to access and fill in the questionnaire if you wish by ticking the "Yes, invite my client to access the intake questionnaire" box and filling in their details. You can also invite your client at a later date, if you wish. You can start with the questionnaire and then switch over to the matter dashboard once the questionnaire is complete. Any information captured in the questionnaire will be populated in your matter dashboard.

After completing the questionnaire, recommendations are made as to what documents should be uploaded to the **Document Portal**. Documents can be securely uploaded and attached to the relevant files.

Dashboard:

You can upgrade selected matters to **dashboard** mode at the per matter fee. The dashboard gives you full access to the matter and allows you to populate the information in any order you prefer. The interactive balance sheet allows you to expertly model proposals, including saving multiple versions for ease of comparisons. You can also model percentage splits as a cash adjustment or allow any adjustment against a particular asset. Upload unlimited attachments to each item giving you all the information you need in the one place and automatically generate various reports saving you valuable time.
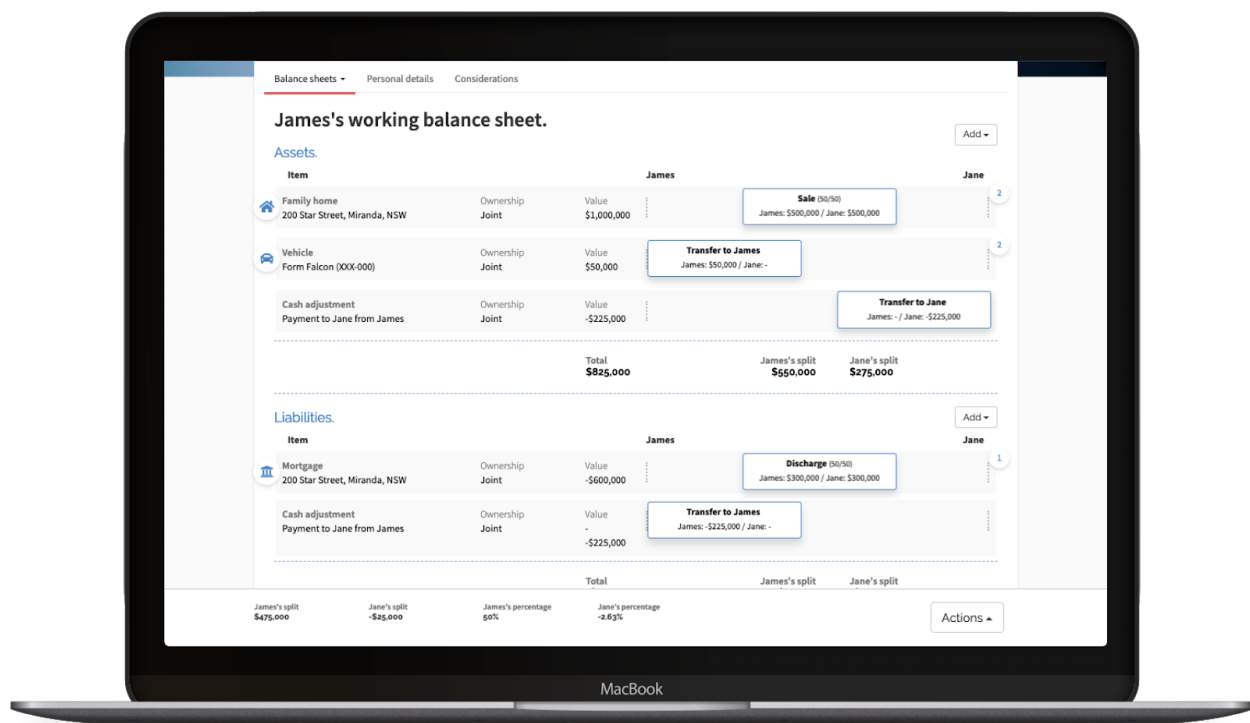
Managing a Matter

Once you have created a new matter, it will appear in your "My matters" list. To change the properties of a matter (such as change modes – from questionnaire to dashboard, invite your client, and manage who has access to the matter) click on the action menu located on the right. **[...]**

Step 4: Updating your firm settings

You can give access to FamilyProperty and update your firm settings through the **firm settings** and **firm users** screen.
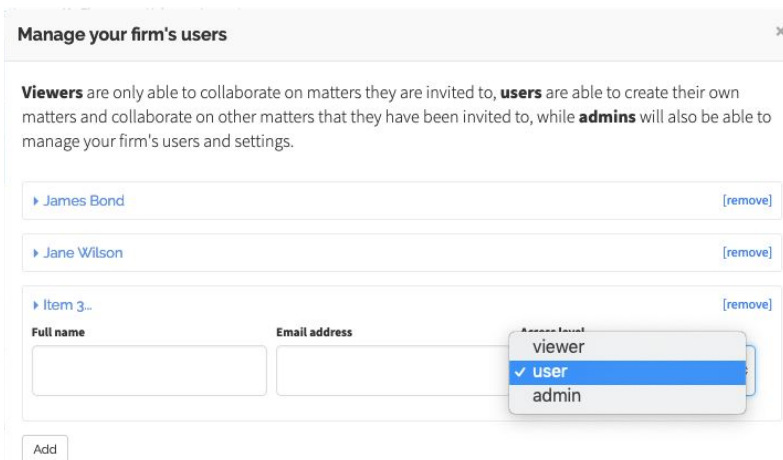
Firm users:

Admins can create and collaborate on matters and can manage the firm's settings. They can also give other people within their team access to FamilyProperty, as well as assigning an access level. We recommend that the firm admins are the principal or practice manager of the law firm/mediation practice.

From the homepage, click on "Firm users" located on the top right-hand side. Click on the "Add" button if you wish to add a new person. Assign each new person an access level, defined below:

- **Users** - Can create their own matters and collaborate on other matters where they are given 'User' access for that matter. We recommend that Users are the lawyer/mediator with carriage of matters.
- **Viewers** - Can collaborate on matters they are invited to. We recommend that Viewers are other staff members of your firm, who do not need to create matters.

Enter their name and email address, ensuring their email address is correct as they will need to sign up with that exact address. Once you add new people to your Firm's account they will automatically be notified via email, with instructions on how to sign up.

Firm settings:

From the homepage, click on "Firm settings" located on the right-hand side. A new window will appear, allowing you to update important properties of your firm's account, such as:

- Uploading your firm's **logo** - If you upload your logo it will appear at the top left of each screen, including the intake questionnaire, as well as at the top of most notification emails.
- **Subscription & billing** - You can check your subscription here.
- **Email settings** - You can edit the email address given in notification and invitation emails.
- **Templates** - Here you will find a set of Word & Excel document templates. These are used whenever a report or document is generated within the matter dashboard. You can, at any time, download our templates, make modifications, and upload your own versions if you wish to customise any of them.
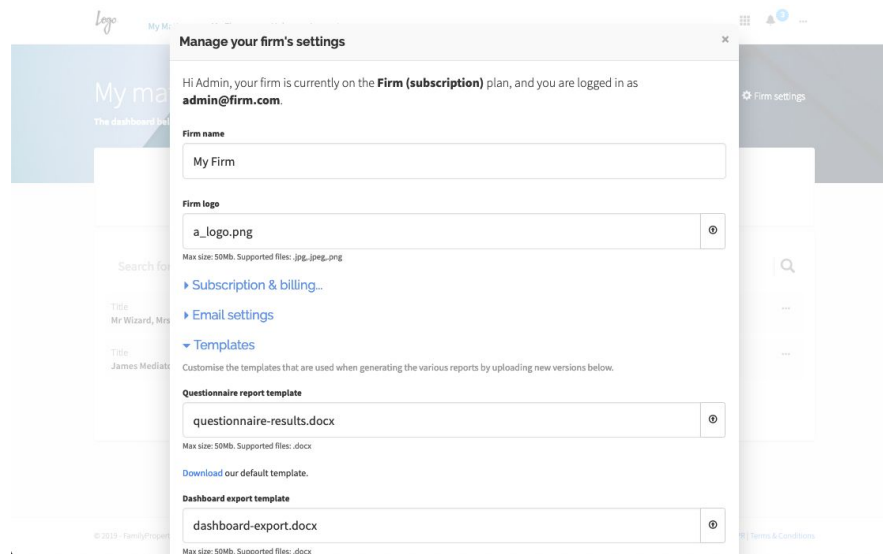
Step 5: Managing your account & security settings

Updating your details:

You can update your account details at any time by clicking on the action menu (located far top right – three horizontal dots) and selecting "My Account". From here you can change your display name and control your security settings.
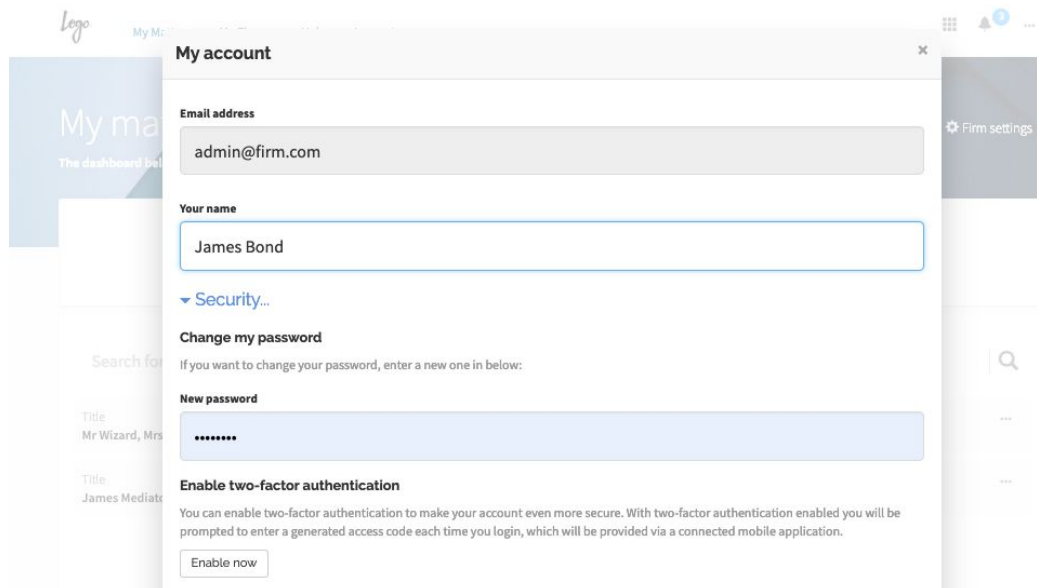
Security

Open the "Security" section and you'll find options to change your password and enable two-factor authentication for your account. When you enable two-factor authentication, every time you login, you'll be prompted to enter a generated access code, which will be provided via a connected mobile application (Google Authenticator) on your phone. We recommend that you take the time to enable two-factor authentication.

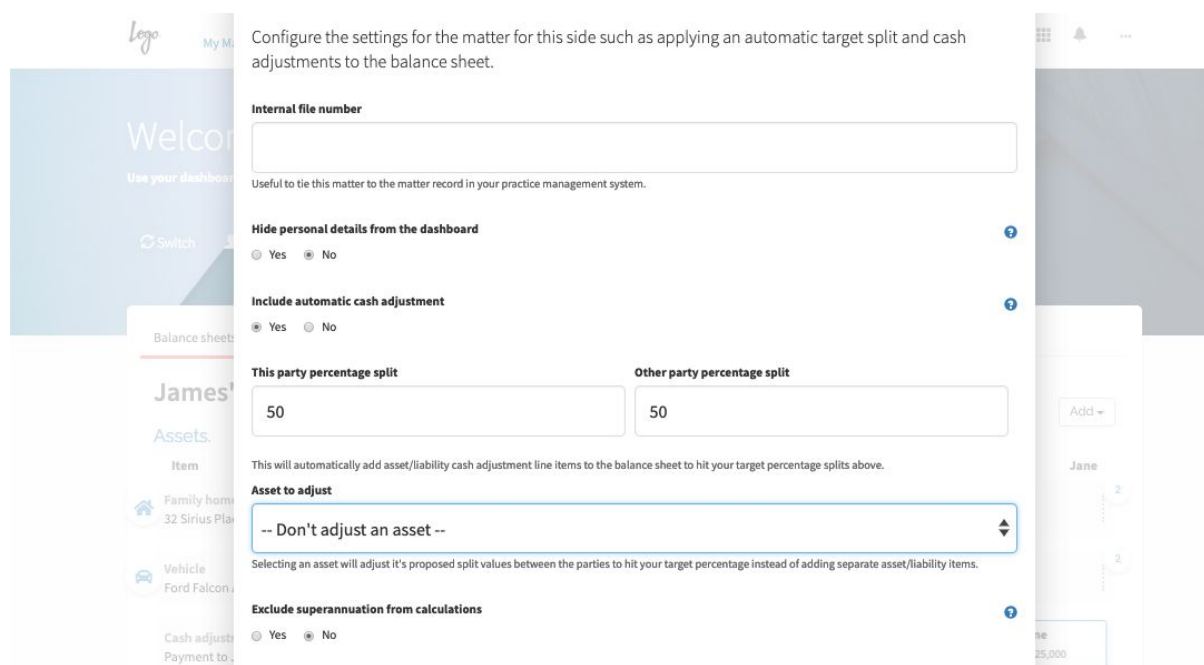Security and privacy is of paramount concern to us. We recommend you view our Security Guide, which responds to FAQs about security.

Step 6: Changing your matter settings

Matter settings:

You can configure each matter as follows:

- An internal **file number** which will appear on all documents generated.
- **Hide personal details** which will hide contact details from the dashboard.
- Include a **cash adjustment** and then add a target percentage split which can be adjusted as a separate line item or adjusted on a particular asset.
- Exclude **superannuation** from the calculation of the asset pool.

Matter users:

The person creating the matter is the owner and is automatically given 'User' access. To

add additional people, simply click on 'Users' in the top menu when in the matter dashboard ir from the homepage, click on the action menu indicated by the 3 dots on

the right-hand side of the matter and select "Users and Settings". Add people to 'Your party' and assign the necessary access level as per the above roles.

Step 7: Getting more help

This guide is designed to get you started with FamilyProperty, but there is much more to it! You can find helpful training videos, support information, and FAQs in our "Help" section, located in the main menu. For reference, we recommend watching the following videos:

1) Setting up your firm
This video tutorial walks you through how to customise FamilyProperty for your firm, and how to invite other people within your firm to use FamilyProperty too. It also covers important security aspects such as how to change your password, enable two-factor authentication, and discusses the different access levels people can have within your firm's account.

2) Using the Dashboard
This video tutorial introduces the FamilyProperty matter dashboard, and takes you through how to populate a matter, upload and download attachments, and how to use the interactive balance sheet. I'll also demonstrate how to generate documents and reports, as well as add notes on the matter, and finally invite other people to access the matter.

3) Populating Your Balance Sheet
This video tutorial steps you through how to use the interactive balance sheet found in the matter dashboard. It shows you how to build up your balance sheet, add and modify proposals, and how publishing works.

4) Modelling Proposals
This video tutorial deep dives into the balance sheet in the matter dashboard to demonstrate how to use versions to model different scenarios, apply percentage splits and cash adjustments to automatically reach target outcomes.

5) Neutral Balance Sheet
This video tutorial introduces the neutral balance sheet, designed for mediators, which brings together both balance sheets into a single interactive view. This tutorial shows how it can be used to populate the balance sheets, jointly model proposals, and how percentage splits and cash adjustments work within the neutral balance sheet.

6) Document Automation
This video tutorial introduces the different reports and documents that can be generated from the FamilyProperty matter dashboard.