

Lexis Affinity The Basics (Course 2)

KEY FACTS

Delivery:

Online Seminar

Course Duration:

1.5 hours

Cost:

\$200 (excluding GST)

Course Outline:

Lexis Affinity The Basics (Course 2) will show you how to create Phonebook, Client, Matter and Matter Contact records in Lexis Affinity and will incorporate:

Phonebook

- Types of phonebook record
- Creating new phonebook records, including businesses, business contacts, individuals and joint parties
- Linked phonebook records
- Using phonebook relationships
- Merging duplicate phonebook records

Conflict of Interest Checking

Clients

- Converting a Phonebook Record into a Client Record

Matters

- Creating a New Matter
- Adding Matter Contacts
- Completing and re-opening a matter
- Archiving and un-archiving a matter

Benefits of attending the course:

- This course will give you and your team an overview of the Lexis Affinity system from the perspective of a day-to-day user covering the creation and altering of Phonebook, Client and Matter records along with completing and archiving matters.
- An understanding of the Lexis Affinity Conflict of Interest Search.

Course Delivery:

- The course will be delivered via our Webex web conferencing service. Attendees will be provided with an email link which will automatically connect them to the session.
- Audio will be accessed by dialling our conference facility.
- Full course material and handouts will be provided and emailed to each attendee once the course booking has been placed and processed.

Intended audience:

- New employees of all types and levels

Pre-requisite knowledge/skills:

- Lexis Affinity The Basics (Course 1)

Registration Information

To book your attendance on this course, please go to

<http://www.knowledge-network.lexisnexis.com.au/home/Products/LexisNexisAffinity/Webinars/> and complete the registration form.