



Getting Started



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Jubilee is a powerful software suite designed to streamline and accelerate your firm's operations. It simplifies case preparation, filing, means test calculations, billing, task management, reporting, NDC payment tracking, and more. By centralizing all your data in one place, Jubilee eliminates the need for multiple, conflicting filing systems, freeing you to focus on what matters most—serving clients and growing your practice.

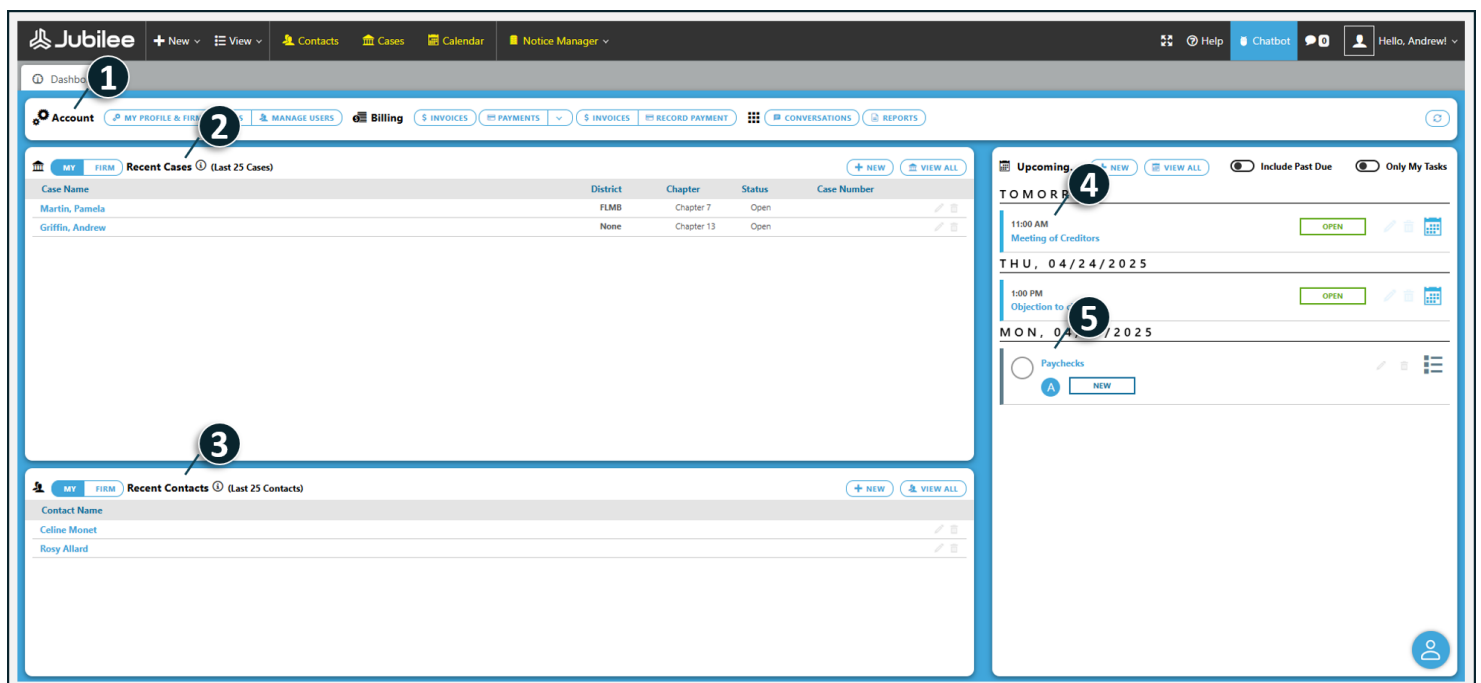
Securely hosted in the cloud, Jubilee ensures your data is always safe, with no need for manual backups. Access it anytime, anywhere, on any device with an internet connection, across all operating systems. Multiple users can collaborate seamlessly, removing the limitations of being tied to a single computer or location.

How do I get started in Jubilee?

This PDF is designed to show the different sections of Jubilee so you can get to know where buttons are located and what they do. The screenshots of Jubilee have numbered sections that correspond with the numbered list below them. This PDF is broken down into five sections: **Dashboard**, **Taskbar**, **Profile Menu** and **Inside a Case: Part One** and **Part Two**.

Dashboard

The Dashboard is designed to display a general overview of your firm activity. You can quickly view recent cases and contacts, tasks(to do items), upcoming events. 



The screenshot shows the Jubilee Dashboard interface. At the top is a navigation bar with the Jubilee logo, a '+ New' button, and a 'View' dropdown. Below this is a secondary bar with icons for Contacts, Cases, Calendar, and Notice Manager. The main content area is divided into several sections. On the left, there's a 'Recent Cases' section (callout 1) with a table of cases. Below it is a 'Recent Contacts' section (callout 3). On the right, there's an 'Upcoming' section (callout 4) showing a calendar of events. A specific event 'Meeting of Creditors' is highlighted with callout 5. The interface includes various filters, search bars, and action buttons like 'NEW' and 'VIEW ALL'.

Case Name	District	Chapter	Status	Case Number
Martin, Pamela	FLMB	Chapter 7	Open	
Griffin, Andrew	None	Chapter 13	Open	

Contact Name
Celine Monet
Rosy Allard

Upcoming Events:

- 11:00 AM**
Meeting of Creditors
THU, 04/24/2025
[OPEN]
- 1:00 PM**
Objection to...
MON, 04/28/2025
[OPEN]
- Paychecks**
[NEW]

1) The **Account** section is where you will find quick links to the most common used features in Jubilee.

2) In **My Recent Cases**, you will see a compiled list of all the recent cases that you have opened. When hovering over a case, two buttons appear to the right side. The pencil icon will take you into the case to edit it. The trash can will remove the case from the My Recent Cases list.

Note: If you would like to see a list of all cases in the firm, click on the Cases button in the task bar.


3) The **My Recent Contacts** section works just like the My Recent Cases section. This is a list of all the latest contacts that you have opened. When you hover over the contacts, two buttons will appear. The pencil icon is for editing the contact's information. This includes details, dependents, business relationships, marketing and notes. The trash can icon will remove the contact from the My Recent Contacts list.

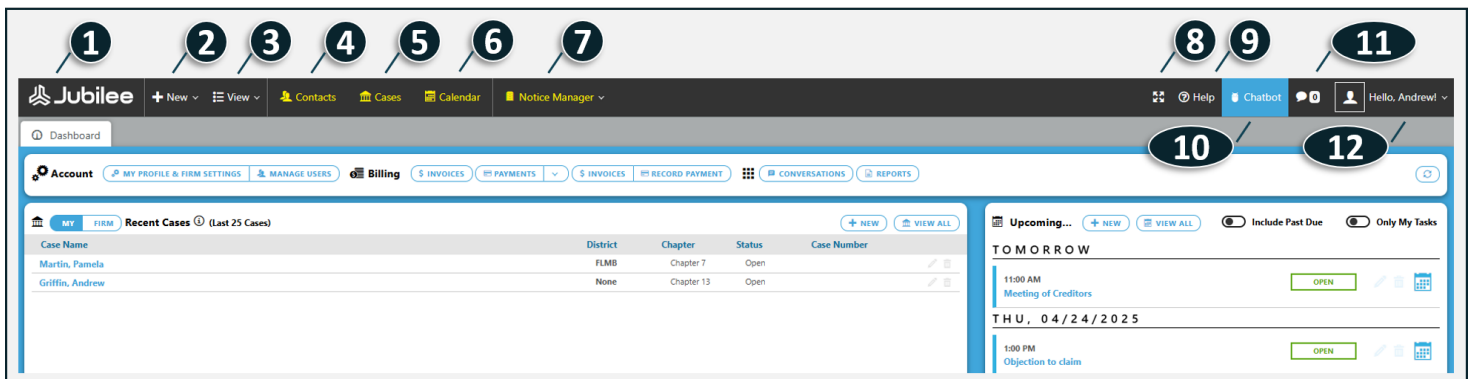
4) **Upcoming Events (Next 7 Days)** will let you add a calendar event with a time, location, subject, type, and the ability to link the event with a case.

5) **To Do Tasks (Next 30 Days)** is where you can look at all the tasks that have yet to be completed. You can add a new task or edit one by assigning it to another user, adding a due date, setting a priority level or you can mark the task as completed.

Note: If you want to see just your tasks and not tasks assigned to other users, then use the Only My Tasks slider.

Taskbar

This taskbar gives you easy access to the most used and important buttons in Jubilee and they can be used at anytime while using the program. 



1) The **Jubilee logo** will take you back to the dashboard tab when on another page.

Note: When clicked on, it will not exit out of any open tab.

2) When clicking the **+New** button you can create a new prospect, contact, client, creditor, judge, trustee, bankruptcy or general case, payment, invoice, event, task and import a case from one of our integrated partners.


3) In the drop-down menu for the **View** button, you can see all your contacts, cases, notes, documents, tasks and activities. There is also a Billing section for invoices, payments and billing reports.

- 4) The **Contacts** button will bring you to a list of all the contacts that you have entered in Jubilee.
 - 5) When clicking the **Cases** button, you will be shown all your cases in Jubilee where you have the option to use filters to sort your Case list.
 - 6) The **Calendar** button allows you to see all the events that have been created as well as automatic calendar events (auto events) if you have activated Jubilee Notices.
- Note: You can put events on your calendar and add a person as an attendee.*
- 7) When you click on **Notice Manager**, you can look at your notice feed and cases. In the **Notice Feed**, you will see a compiled list of all your emails from all your cases with the newest at the top, similar to viewing emails in an inbox. The **Cases** tab will show you how many notices there are for each case and what they pertain to.
 - 8) When you click on the **Maximize** button, you can go full screen. It typically expands the current window to take up the entire screen. Clicking the button a second time will restore the Jubilee screen to its original size.
 - 9) The **Help** button is where you can find our phone number and hours, tutorial videos, the Jubilee community forum and the remote assistance button. It also gives you the options to submit a request to our Support Team.
 - 10) Our **Chatbot** is a virtual assistant designed to instantly answer your questions, provide information, and guide you through our services. Once you click on it, a chat icon will pop up in the bottom right corner of your screen. Click this icon, and a window will open so you can start the conversation.
 - 11) This **Message** icon lets you know about the latest updates, new features, new notices received in Jubilee Notices and other important notifications.
 - 12) The location of your name in the top right corner is the **Profile Menu**. This is where you can change the settings for your account, see a list of all exemptions and find assistance with the program.



Profile Menu

Click on the Profile Menu button to find your main Jubilee settings, a State and Federal Exemption list and a Help section.

**We recommend that you add the following items to your account when getting started: additional user accounts (if applicable), attorney bar number and state, firm address and ECF filing login. *

1) In **Profile & Firm Settings**, you can add information related to your user account including attorney bar number and state, contact information, security (changing password), credit cards, credentials and defaults.


You can also see your firm's case statistics, offices, user-defined lists, plan provisions, users and licenses.

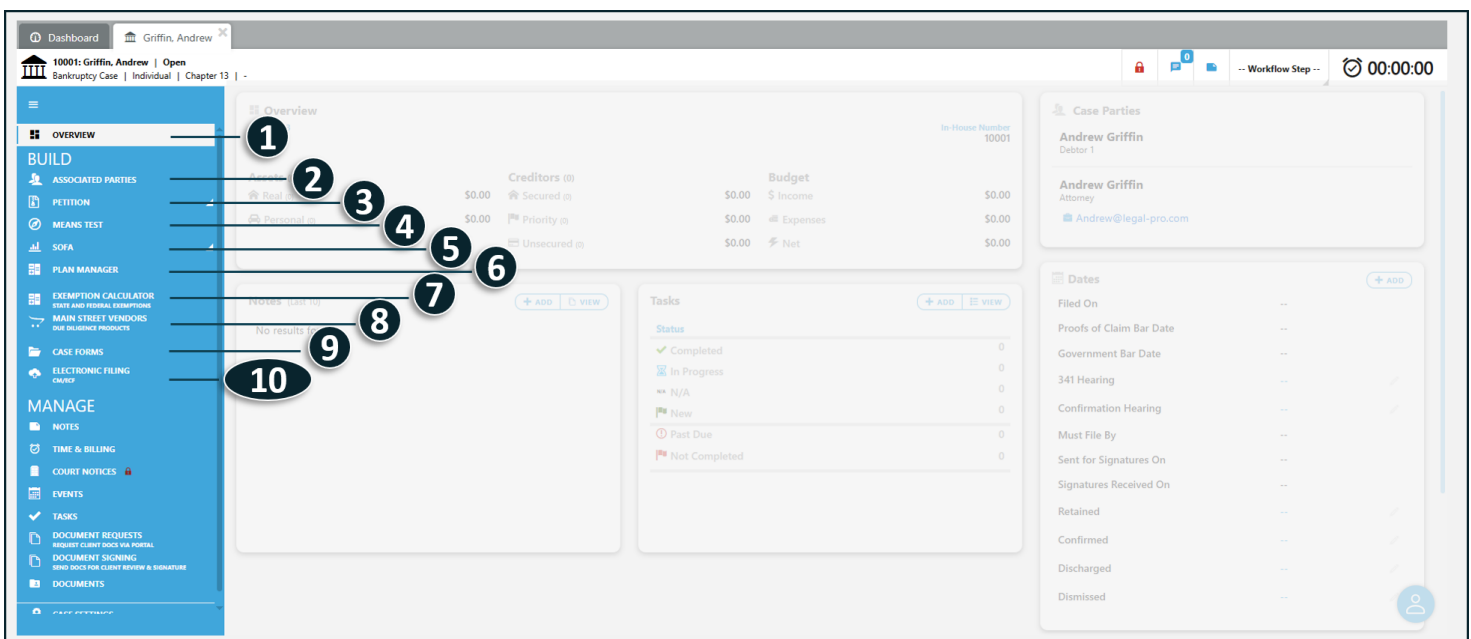
Note: The **Credentials** section is strictly for your logins for the companies we are integrated with, not for changing your ECF credentials for the district in which you are filing.

Note: On the Firm-Defined Lists tab, you can add custom drop-down options which will make the data entry process quicker. For example, you can add a custom list for other types of nonpriority unsecured claims.

- 2) Under the **Managing Users** section, you can add, delete and update information for a user.
- 3) The **Federal Exemptions** or **State Exemptions** buttons show a complete list of all the exemptions available in Jubilee. These can be searched by keywords and filtered by state.
- 4) Jubilee allows you to easily import your existing case details and contact information directly from various vendors. This **Case and Data Import** feature saves you significant time and effort by eliminating the need for manual entry.
- 5) The **What's New** section will give you a list of recent updates and new features that have been added to Jubilee.
- 6) This help section will lead you to our **Tutorial Videos** for using the program as well as to a link to Submit a **Support Ticket** where you can post your questions to be answered by our support representatives. If you need assistance immediately, you can call us and if needed, we will log into your computer through the **Remote Assistance** button located at the bottom of the drop-down menu.
- 7) Our **Chatbot** is a virtual assistant designed to instantly answer your questions, provide information, and guide you through our services. Once you click on it, a chat icon will pop up in the bottom right corner of your screen. Click this icon, and a window will open so you can start the conversation.
- 8) The **Dark Mode** switches the screen to a darker color scheme for easier viewing in low light and a different visual style.

Inside a Case: Part One

This first part of this section focuses on the BUILD section of the case. This location is where you will input all of the information for your case. To see the Manage section, proceed to **Part Two**. 



1) The **OVERVIEW** section is where you can see your main case information such as case status, case number, district, important dates and the parties included in the case.

2) Here, in the **ASSOCIATED PARTIES** section, you will be able to add parties to your case (i.e., required noticing parties, attorneys/petition preparers, staff members, court/clerk personnel and trustees).

3) When you are in the **PETITION** section, you will get a drop-down menu for the following sections: General Information, Property, Creditors, Executory Contracts and Income & Expenses.

a) In the **GENERAL INFORMATION** section, you can edit the details, jurisdiction, debtors, fees, bankruptcies, tenant, hazardous properties, credit counseling and financial management for your case.

Note: The Debtors tab is where you can edit the debtor's information and designate your Nature of Debt, Venue and Military Service. Under the Fee's tab is where the Fee Disclosure and the Filing Fees are located. Inside Filing Fees, when you click on the blue OPTIONS button to the right of the page, you can choose to include order, print amounts, or do not check any boxes on the order when doing the application to pay filing fees in installments. Under the Filing Fees tab, when the waiver requested button is checked, a grey button called Modify Waiver Details appears. When you click the Modify Waiver Details button, you can fill out the income, expenses, property and additional tabs for the Chapter 7 Filing Fee Waiver. Back on the main General Information tab, there is a settings button to the right of the page where you can edit the funds available for distribution to general unsecured claims.

b) Here, in **PROPERTY**, you will find the tabs for different types of assets such as real estate, vehicles, household items, financial assets, business related, farm and fishing and other assets.

Note: When viewing the official form for Schedule A/B (Form 106A/B), if you have more than one asset per category

(Excluding Real Property and Vehicles), it will print on the Continuation Page (last page when viewing forms).

c) The **CREDITORS** section is where you can add secured, priority and unsecured creditors.

d) In **EXECUTORY CONTRACTS**, a new contract can be added with information added on the details, plan options (only for a Chapter 13 case) and liable parties' tabs.

e) In **INCOME & EXPENSES**, you can fill out the information for Schedule I and J. Along the bottom of the screen, you will see the monthly income, monthly expenses and monthly net income.

4) Inside the **MEANS TEST**, information can be entered for the paystub details, current monthly income and calculations of disposable income tabs.

5) The **SOFA** (Statement of Financial Affairs) section is where questions 1-28 are broken down into 11 parts according to the sections on the forms.

6) **PLAN MANAGER** will only appear if you are preparing a Chapter 13 case. Once here, you can fill out information in the details, calculators, creditors in plan, pay orders and plan provisions tabs. You will usually control how a creditor is to be paid under the plan using the Plan Options tab in the creditor in the case.

7) In the **EXEMPTION CALCULATOR**, you can see the summary, State Exemptions Applied and Federal Exemptions Applied tabs. On the Summary tab, there is a breakdown of the State and Federal exemptions used (if applicable in the case jurisdiction), the amount exempted and the amount not exempted. By clicking on either the State Exemptions Applied or Federal Exemptions Applied tab, you can add or delete exemptions for different assets. The initial assignment of exemptions will be done in the actual asset but this is a good place to catch exemption assignments you may have missed using the Only Show Non-Exempt Assets checkbox at the bottom.


Note: In this section, when you click on Settings on the right-hand side, there are setting options to generate a separate Schedule C for joint debtor, separate manual amounts for each debtor, ignore per item limit and head of household.

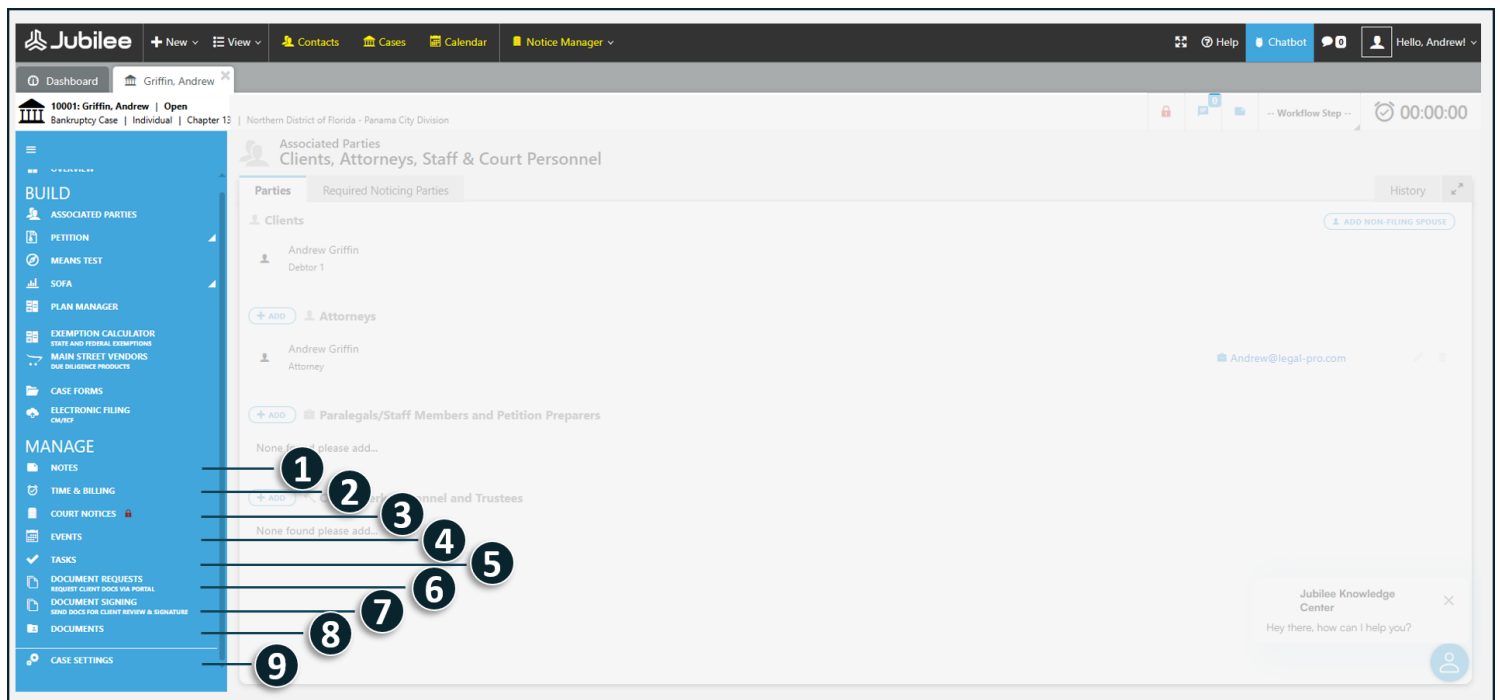
8) In **MAIN STREET VENDORS**, you can view, place or import an order for due diligence products.

9) In **CASE FORMS**, you can view all the official, local and miscellaneous forms and documents based on the chapter and jurisdiction of the case.

10) **ELECTRONIC FILING** is where you will go to file your case with CM/ECF. As you are going through the process of filing, you will be taken through the ECF documents and filing summary tabs.

Inside a Case: Part Two

This first part of this section focuses on the BUILD section of the case. This location is where you will input all the information for your case. To see the Manage section, proceed to **Part Two**. 



1) Inside **NOTES**, you can add any additional information or remarks about the case.

2) **ACTIVITIES** is where you can record your time and billable items for the case. Each item can be categorized and assigned a specific billing rate. Activities can then be used to create invoices in our upcoming billing features.

3) **NOTICES** is where you can see a compiled list off all the court notices sent from the Bankruptcy Court. It is broken down into two parts- Docket and Claims Register. You can view the notice, message and documents contained in the email as well as any calendared events (if applicable). It is also where all the invoices and payments associated with this case are located.

4) Inside the **EVENTS** section are all the calendar events that are linked to this case. Jubilee Notices will automatically create some of these events from the Court Notices, but you also have the ability to create new events and add them to the calendar.

- 5) The **TASKS** section is where you can create individual or group tasks (to do items) that can also be saved as a template. These tasks will also appear when you are on the Dashboard tab in the To Do Items (Next 30 Days) section.
- 6) The **DOCUMENT REQUESTS** allows you to create organized lists of required documents for each case. You can assign these requests to specific contacts (like clients), set deadlines, and track which documents have been submitted. Often, it provides a secure way for clients to upload files directly into Jubilee, streamlining the document gathering process.
- 7) The **DOCUMENT SIGNING** refers to the platform's built-in capability that allows you to securely send documents to clients and other parties for electronic signatures. Instead of printing, mailing, and manually signing documents, you can manage the entire signing process digitally within Jubilee.
- 8) The **DOCUMENTS** section is your online document storage space for this case. This section displays a list of all the documents that have been uploaded to Jubilee as well as the case filing logs and filing receipts.
- 9) The **CASE SETTINGS** is where you manage the specific details for each legal case. It provides a centralized location to control various aspects of the case, allowing for customization and efficient management.

Contact Information

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7:30-6:30 Central Time, Monday-Friday

Click on the **bold text** to go directly to each website.

Tech Support

Support Email:

support@jubileepro.com

Email us with questions, comments or concerns. If immediate assistance is needed, please call us at (210) 561-5300.

Schedule a call with our **Onboarding Specialist:**

<https://calendly.com/evonne-1>

YouTube Channel: https://www.youtube.com/channel/UCxmiUD-xM_IJUOeWG_WO_wA

Website

Jubilee:

<https://app.jubileepro.com/Account/Login>

This link will take you to the Jubilee application log in page.