JUBILEE GETTING STARTED

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Jubilee is a suite of software that can help you manage your firm simpler and faster. Jubilee manages case preparation and filing, as well as means test calculations, billing, task management, reporting, NDC payment tracking, and much more. It keeps all your information in the same place, eliminating the need for multiple competing filing structures. Jubilee makes sure you have more time to spend on the important things, like helping clients and managing your practice.

All of Jubilee's information is stored securely in the cloud, meaning you don't have to worry about saving your information or managing backups. It's accessible anywhere with an internet connection, on any operating system. It allows for multiple users to work in tandem, eliminating the hassle of being tied to just one computer or location.
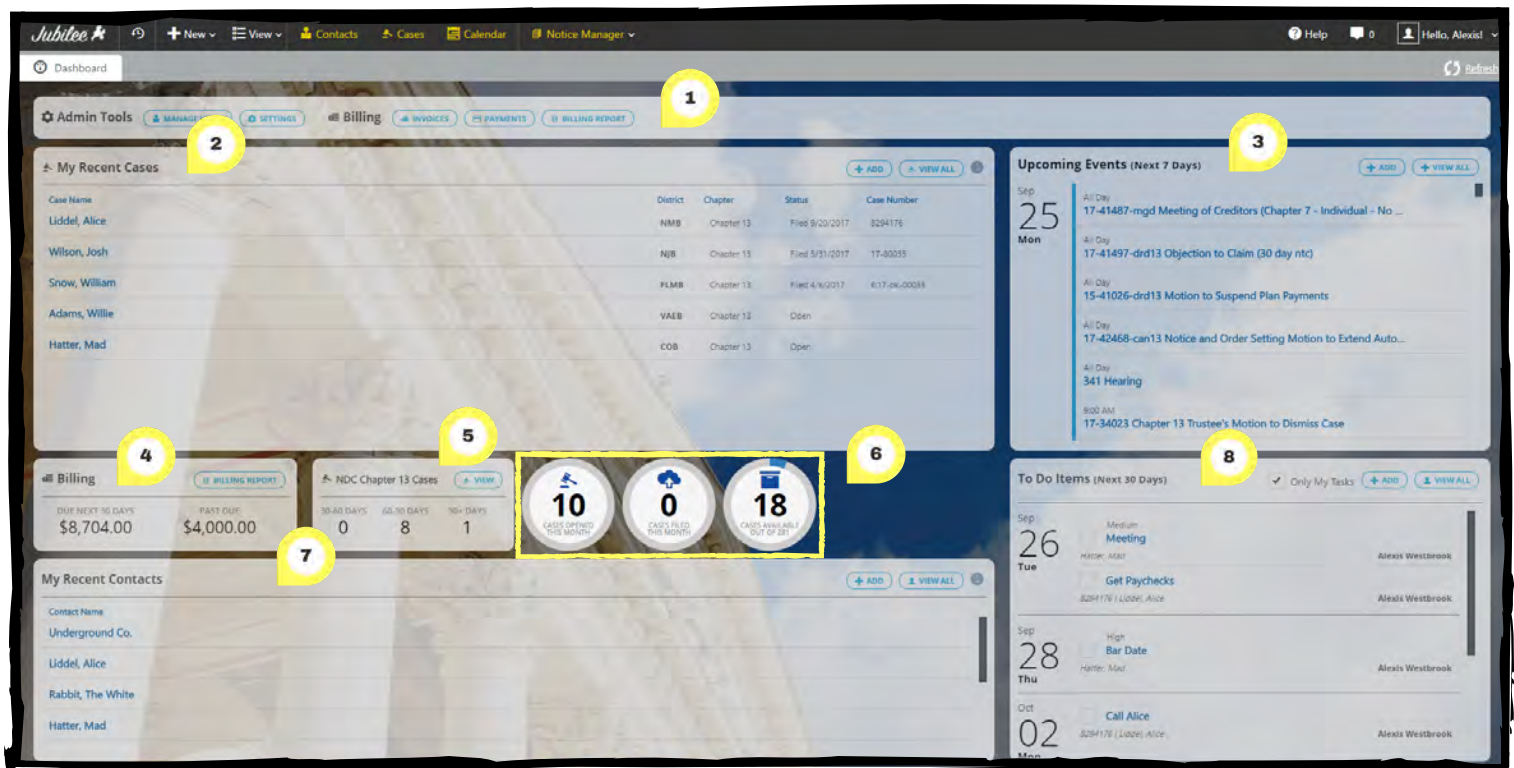
To find out how to access all these features and more, keep reading!

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 Two.

Dashboard

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

1) The Admin Tools 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) 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.

4) Billing is where you can track the invoices you have created. This gives you a quick look at what is past due and due in the next 30 days. To see more information regarding your invoices, click on ***BILLING REPORT***.

5) The NDC Chapter 13 Cases section is for connecting your Jubilee account with the National Data Center (NDC). When connected, it will show how many cases have past due debtor payments within 30-60 days, 60-90 days and 90+ days.

6) This section is where you can view your case statistics. These include how many cases have been opened, filed and how many case credits you have available.

*Note: If you click on the button that says **Cases Available Out Of** (the amount purchased), there are more case statistics located here as well as the ability to purchase additional cases.*

7) 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.

8) To Do Items (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 mark the task as completed.

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

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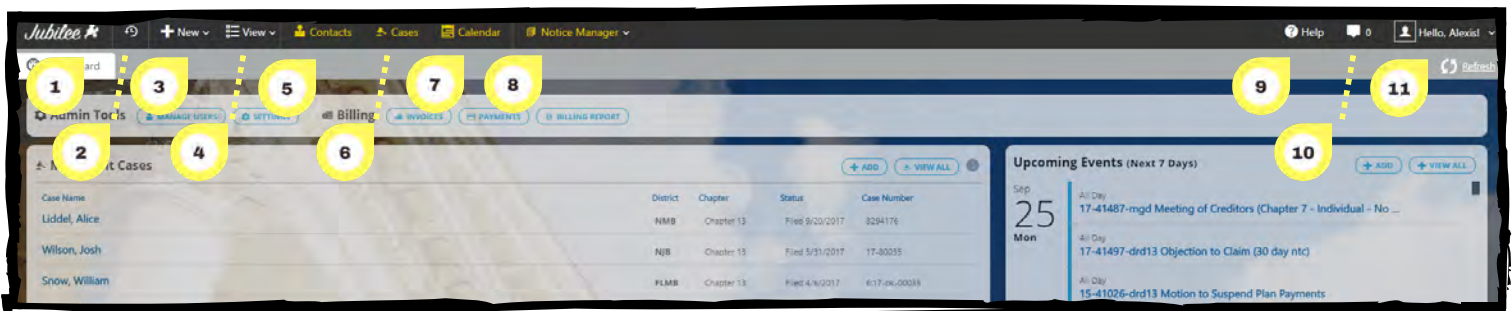
1) The Jubilee logo will take you back to the dashboard tab when on another page.

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

2) This History icon gives you a quick look at the cases and clients that were recently accessed.

3) When clicking the +New button you can create a new prospect, contact, client, creditor, judge, trustee, bankruptcy or general case and import a case from BKPacket.

Note: BKPacket is an online questionnaire for the debtor to complete and the data can be imported directly into Jubilee.

4) 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.

5) The Contacts button will bring you to a list of all the contacts that you have entered in Jubilee.

6) 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.

7) 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.*

8) 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.

Note: This feature is for Jubilee Notices and is a separate charge.

9) The Help button is where you can find our phone number and hours, tutorial videos, instructional PDFs, the Jubilee forum and the remote assistance button. It also gives you the options to submit a request (creating a support ticket) and signing up for the monthly webinar.

10) This Message icon lets you know about the latest updates, new features, when you receive new notices from Jubilee Notices and other important notifications.

11) 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.
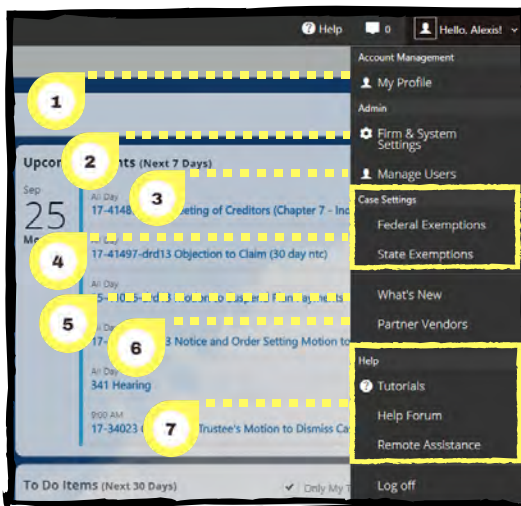
Profile Menu

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 My Profile, 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.

Note: The Credentials section is strictly for your logins for the companies we are integrated with (CIN, MFI Credit Solutions, etc.), not for changing your ECF credentials for the district you are filing in.

2) When clicking on Firm & Systems Settings, you can see your firm's case statistics, offices, user-defined lists, plan provisions, users and licenses.

Note: On the User-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.

3) Under the Managing Users section, you can add, delete and update information for a user.

4) 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.

5) The What's New section will give you a list of recent updates and new features that have been added to Jubilee.

6) Clicking on Partner Vendors will take you to a list of our associated companies where clicking on their logo will take you to their website for more information.

7) This help section will lead you to our Tutorial Videos for using the program as well as a Help Forum 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.

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) The SOFA section is where questions 1-28 are broken down into 11 parts according to the sections on the forms.

5) Inside the MEANS TEST, information can be entered for the details, currently monthly income and calculations of disposable income tabs.

6) The TOOLS section will give you a drop-down menu with tabs for the Exemption Calculator, Plan Manager (Chapter 13 cases only) and Main Street Vendors (third party service providers).

    a) 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, 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.

*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.

b) 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.

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

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

8) 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

Under the MANAGE section is the location of the notices, tasks, events, activities, notes, documents and billing associated with the case you are in. ⚛
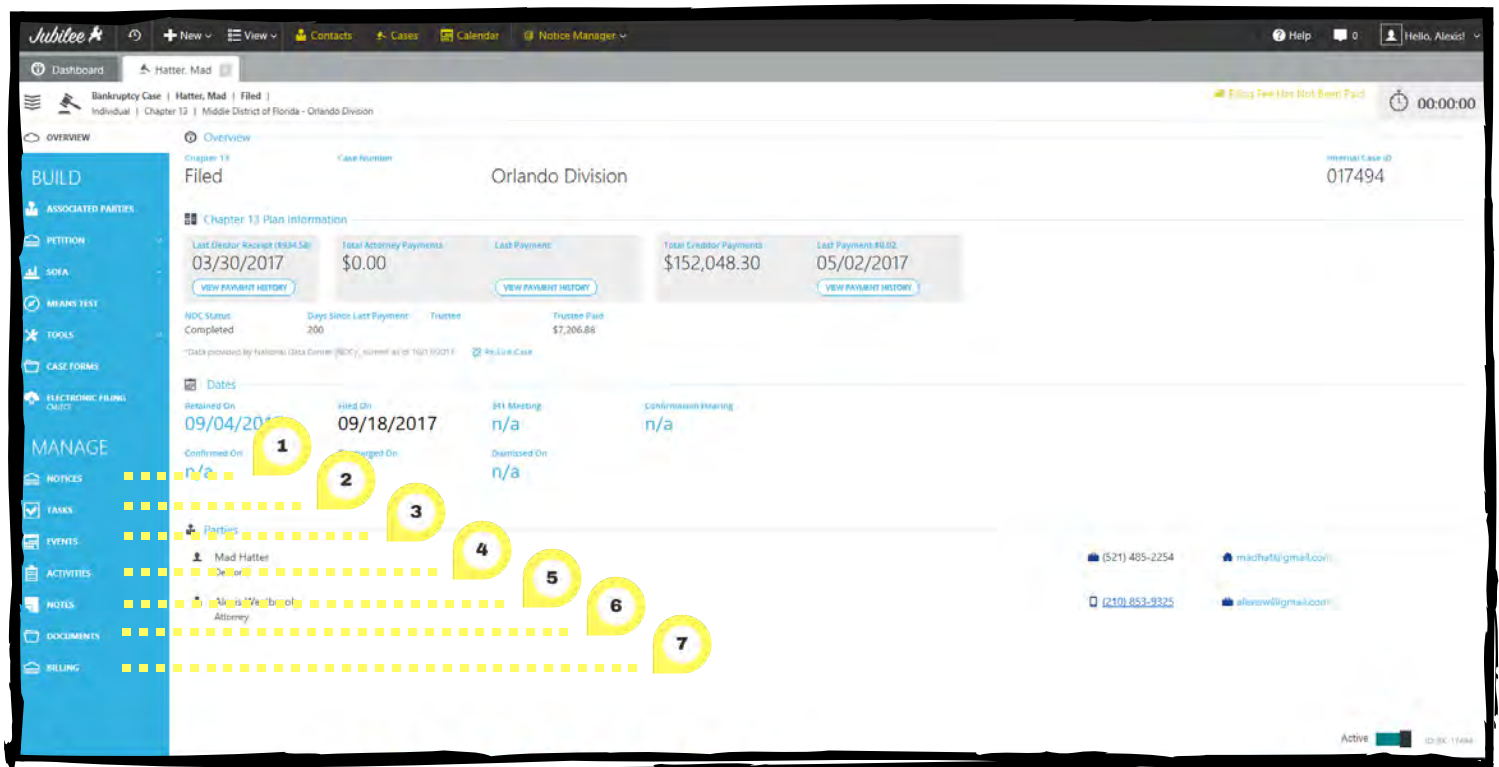
1) NOTICES is where you can see a compiled list off all the court notices sent from the Bankruptcy Court. It is broken down into two parts- Docket and Claims Register. You can view the notice, message and documents contained in the email as well as any calendared events (if applicable).

Note: This is an additional feature. Please contact our office to activate Jubilee Notices.

2) 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.

3) 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.

4) ACTIVITES 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.

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

6) 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.

7) BILLING is where all the invoices and payments associated with this case are located.

For more information about navigating Jubilee, feel free to contact us. Continue scrolling down for our contact information.

CONTACT INFORMATION

LegalPRO Systems, Inc.
12042 Blanco Rd #308, San Antonio, TX 78216
(210) 561-5400
7:30-6:30 Central Time, Monday-Friday

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

Tech Support

Support Email:
support@legal-pro.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

Tutorial Videos:
https://jubileebk.com/tutorial-videos
These how-to videos are located on our
Jubilee website.

Forum:
http://forum.legal-pro.com
On our Forum, you can post a
question or look at previous
questions we have answered.

YouTube Channel: https://www.youtube.com/channel/UCxmiUD-xM_IJUOeWG_WO_wA
Subscribe and be notified when new videos are posted and have first access to it before it goes on our Jubilee website.

Websites

LegalPRO:
https://legal-pro.com
On our main website is where
you can find a list of our products,
client testimonials, meet the
LegalPRO team, pricing and other
related information.

Jubilee:
https://jubileebk.com
This is where you can find tutorial
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Jubilee Application:
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This link will take you to the
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