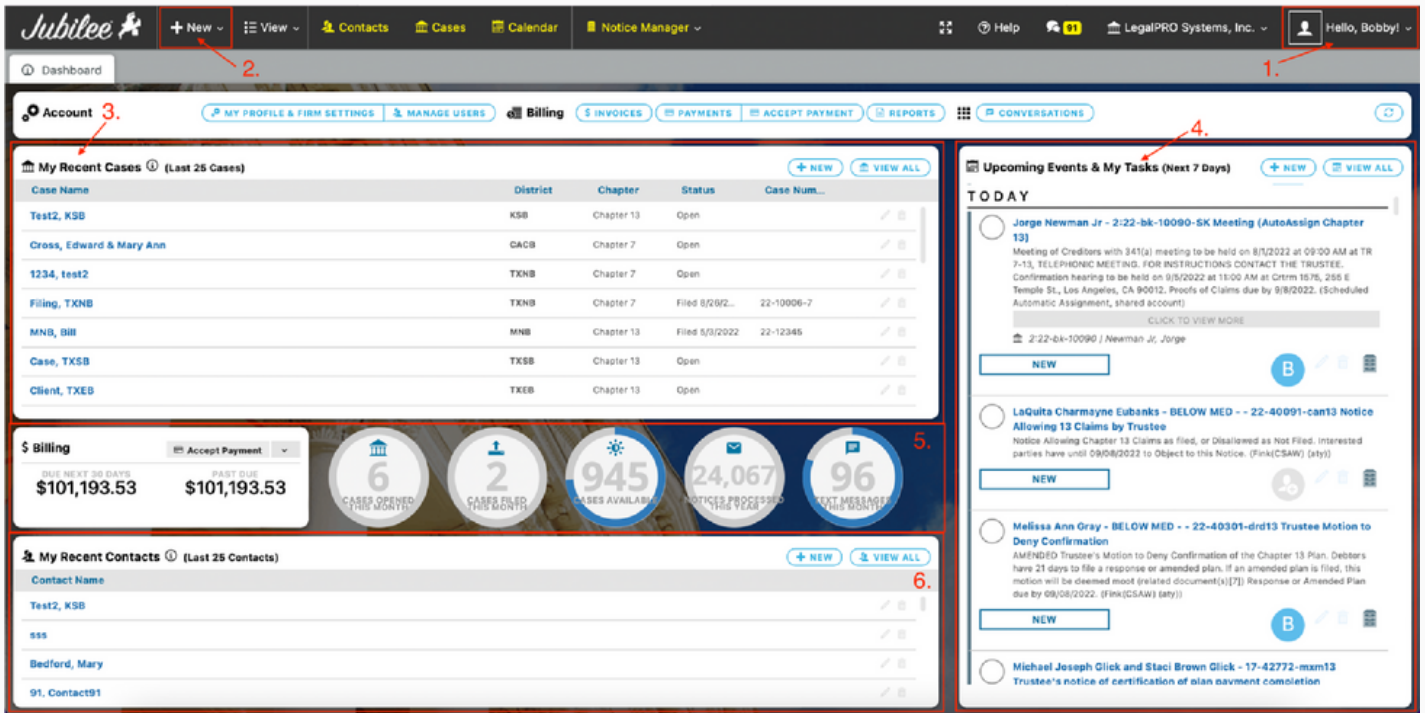


# Jubilee Dashboard Overview

The Dashboard is designed to display a general overview of your firm activity. You can quickly create and view cases, contacts, tasks, upcoming calendar events, and basic firm statistics.



The screenshot shows the Jubilee dashboard interface. Red callouts are placed over various elements:

- 1:** Points to the user profile icon in the top right corner, labeled "Hello, Bobby!".
- 2:** Points to the "+ New" button in the top left navigation bar.
- 3:** Points to the "Account" section in the top left, which includes links for "MY PROFILE & FIRM SETTINGS", "MANAGE USERS", "Billing", "INVOICES", "PAYMENTS", "ACCEPT PAYMENT", and "REPORTS".
- 4:** Points to the "Upcoming Events & My Tasks (Next 7 Days)" section on the right side of the dashboard.
- 5:** Points to the "Billing" summary cards in the middle section, showing "DUE NEXT 30 DAYS" and "PAST DUE" amounts of \$101,193.53.
- 6:** Points to the "My Recent Contacts" table at the bottom left, which lists contact names like "Test2, KSB", "sss", and "Bedford, Mary".

1. The **Settings menu** is where you will add user accounts (Manage Users) to access Jubilee, edit your user account profile, connect to 3rd party integration partners, edit firm settings (Admin account only), and access support resources/training.

2. The **New** button is where you will create new Cases, add new Contacts, or import cases from BKPacket/Lexria.

3. In **My Recent Cases**, you will see a list of all the recent cases that your user account has accessed/opened. You can click on the case name to open the case file to access the case details. *Note:* If you would like to see a list of all cases in the firm, click on the Cases button in the task bar.

4. **Upcoming Events & My Tasks (Next 7 Days)** displays upcoming calendar events within Jubilee and tasks assigned to your user account. You can add new calendar events here by clicking on the New button or you can access the full calendar by clicking on Calendar on the top toolbar. You can also access the full task list for the firm by going to View - Tasks on the top tool bar.

5. **Billing and Firm Statistics** will show you some basic firm metrics and Jubilee filing case credits available. You can click on the circular buttons for more info or to purchase additional Jubilee case filing credits. The billing section will display upcoming invoice balances, but you can access more detailed billing information by going to View – Billing from the top toolbar.

6. 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 or created. You can view the full Jubilee Contact list by clicking on Contacts on the top toolbar.

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