

SmartAdvocate®

Tip of the Week

Did you know that saving a document in SmartAdvocate can be accomplished by “*dragging and dropping*” the document to the case file? Here we are referring to documents that may have been saved on a local or network drive for example, that you want to be copied to a case file in SmartAdvocate.

To do so, click the ‘*Attach*’ tab on the lower tool bar (the ‘quick add’ bar) in the case you want to attach/save the document to. A dialog box will open with the ‘Drag and Drop’ feature available (*drag & drop file(s) here . . .*). Simply locate the document on the local or network drive and drag it to the window. Thereafter, you just need to supply the mandatory Direction, Document Type, Sub-Type, From and To and an optional Description. (Of course, the ‘browse’ feature remains available if you prefer to use that option).

The ‘drag & drop’ feature makes it much easier to download a pdf documents from a website, for example, and upload/attach/save it to a case file without having to download the document to a specific folder, naming it and then attach it in several steps.

There are a few preferences that you can set in Chrome that will help to streamline the process of saving downloaded pdf documents to a case in SmartAdvocate. To set your preferences in Chrome to have pdf documents automatically downloaded instead of opening first and then having to save and then upload them to SmartAdvocate, you could make the following changes to your settings in Chrome:

1. Click on the menu icon in Chrome (three dots in the top right corner of your screen when Chrome is open)

SA My SmartAdvocate - SmartAdvoc: x +

Not secure | saweb/MySmartAdvocatePanels.aspx

Apps Imported from IE Workspace Login SA Login to SmartAdvoc: SA CRM Login LogMeIn join.me Conferencing Bookmarks The Common Appli: Bookmarks Google Twitter Miracles of Jesus: Jes: 18 in.Tennis Ball Ball: Other bookmarks

SmartAdvocate Cases: Open Closed All Case # / Plaintiff Welcome Claude

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Project Details Admin Favorites Help My SmartAdvocate

My Appointments Configure

Appointments from 11/5/2018 to 1/5/2019 Filter Show/Hide Columns

Case #	Case Name	Date and Time	Activity Info	Subject/Description	Action
CS1800	Miss Hinds, Mandy -v- Miss Ramirez, Juanita	11/19/2018 10:00 AM 4:00 PM	Appointment Location: Supreme Court New York County 60 Centre Street New York, NY 10007 (2018-63546) Judge: Jacob Smith	Trial - All Issues	
CS1800	Miss Hinds, Mandy -v- Miss Ramirez, Juanita	11/18/2018 10:00 AM 4:00 PM	Appointment Location: Supreme Court New York County 60 Centre Street New York, NY 10007 (2018-63546) Judge: Jacob Smith	Trial - All Issues	
CS1800	Miss Hinds, Mandy -v- Miss Ramirez, Juanita	11/17/2018 10:00 AM 4:00 PM	Appointment Location: Supreme Court New York County 60 Centre Street New York, NY 10007 (2018-63546) Judge: Jacob Smith	Trial - All Issues	
Total: 9					

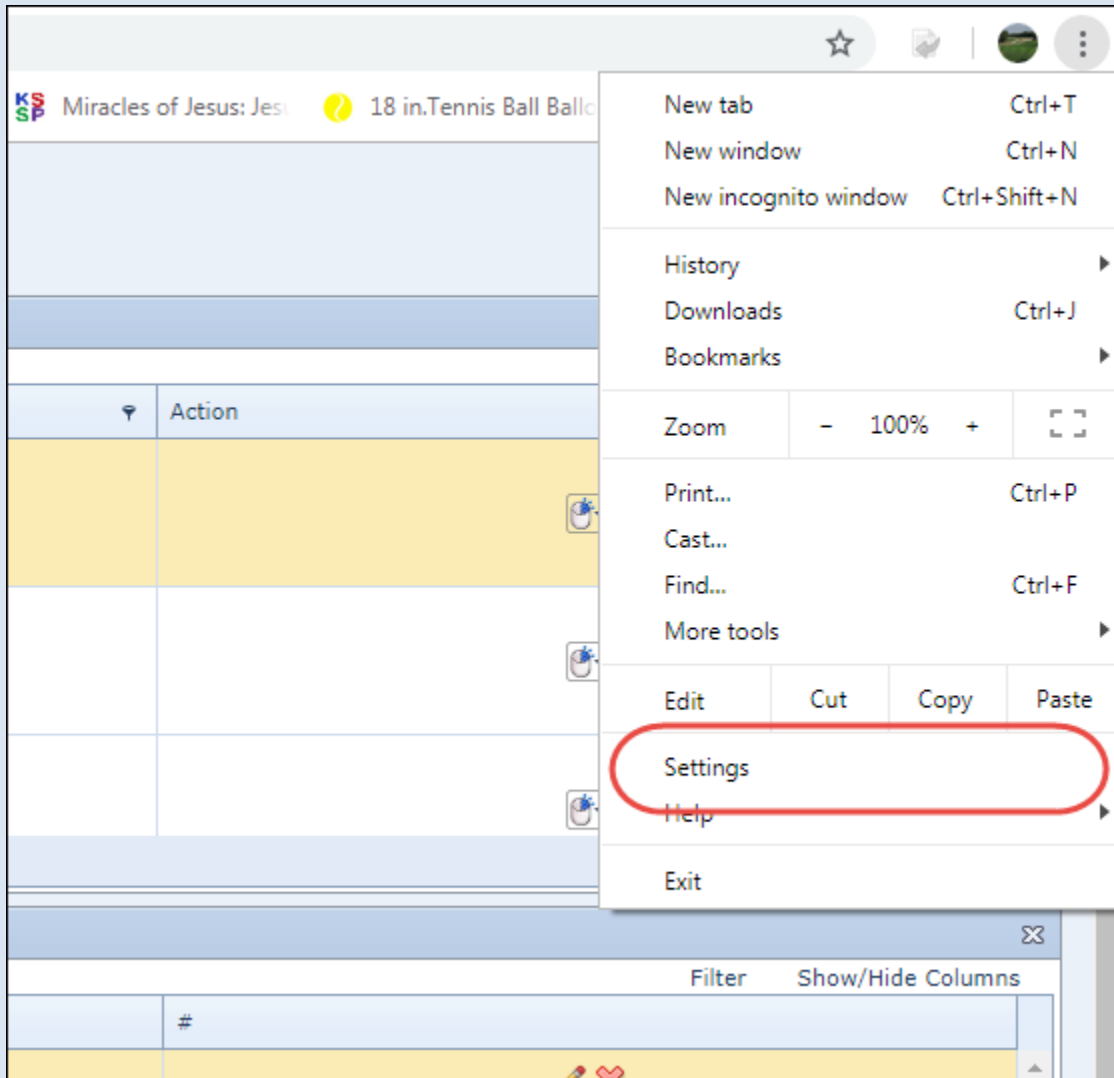
Critical Deadlines Configure

Critical Deadlines & SOLs from 8/6/2017 to 3/8/2019 Filter Show/Hide Columns

Case	Case Name	Due Date	Info	#
CS6078	Robles v. Espinoza	10/20/2017		
HD114	Robles v. Espinoza	10/20/2017		
NBCS6078	Robles v. Espinoza	10/20/2017		
JCHD114	Robles v. Espinoza	10/20/2017		
CS6091	Maralow, Jennifer -v- Maralow, Phillip	12/18/2017	Jennifer Maralow Requested by Phillip Maralow	
HD112	Maralow, Jennifer -v- Maralow, Phillip	12/18/2017	Jennifer Maralow Requested by Phillip Maralow	
Total: 79				

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2. Click on Settings



3. Click Advanced

Search settings

Show bookmarks bar

Font size Large

Customize fonts ▶

Page zoom 100%

Search engine

Search engine used in the address bar Google

Manage search engines ▶

Default browser

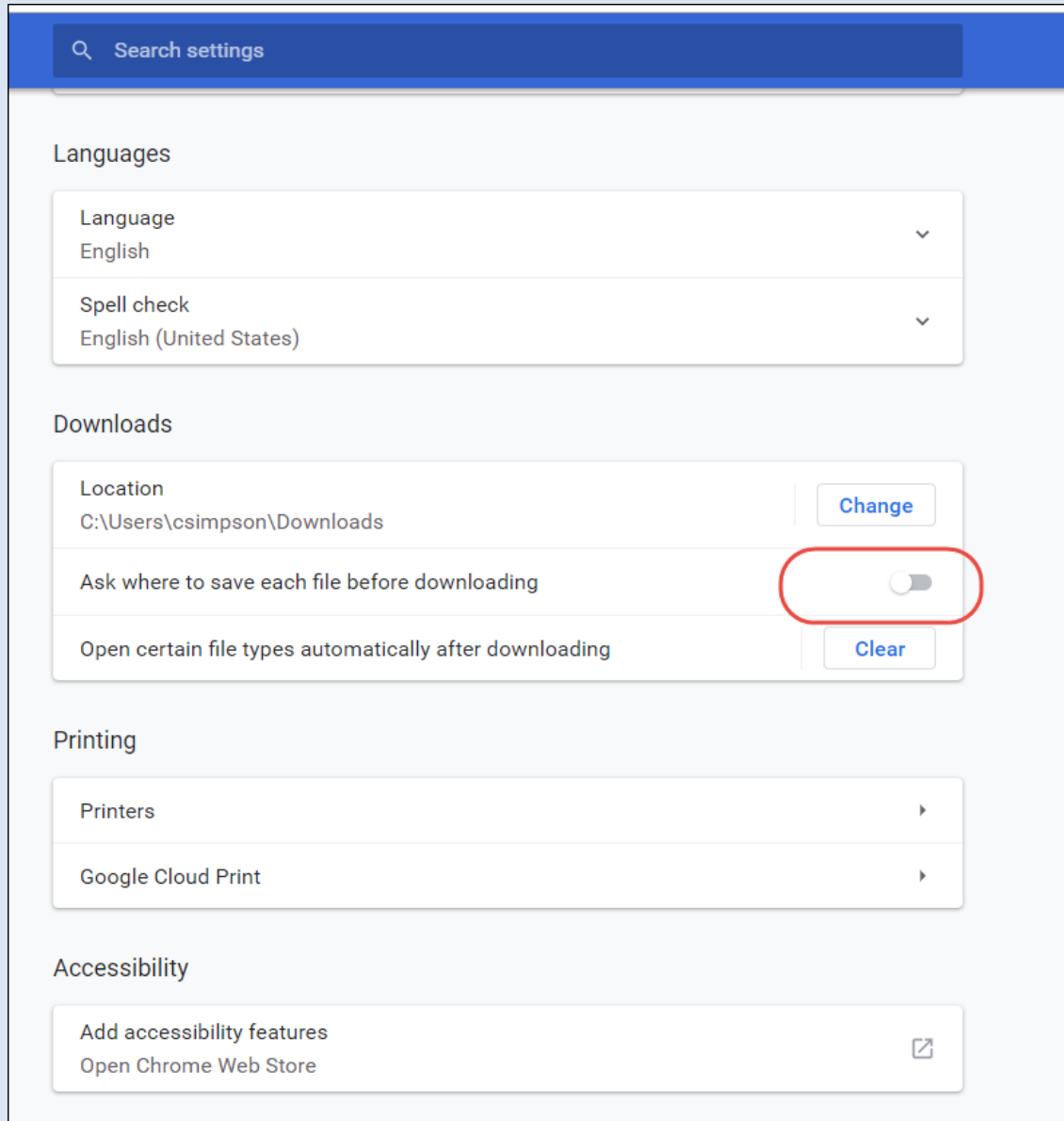
Google Chrome is your default browser

On startup

- Open the New Tab page
- Continue where you left off
- Open a specific page or set of pages

Advanced ▼

4. Under the 'Downloads' section, make sure "Ask where to save each file before downloading" is set to 'OFF' (tab on the right should be white)



5. Click on content settings

Search settings

Help improve Safe Browsing

Sends some system information and page content to Google



Automatically send usage statistics and crash reports to Google



Use a web service to help resolve spelling errors

Smarter spell-checking by sending what you type in the browser to Google



Send a "Do Not Track" request with your browsing traffic



Allow sites to check if you have payment methods saved



Manage certificates

Manage HTTPS/SSL certificates and settings



Content settings

Control what information websites can use and what content they can show you



Clear browsing data

Clear history, cookies, cache, and more



Languages

Language

English



Spell check

English (United States)



Downloads

Location

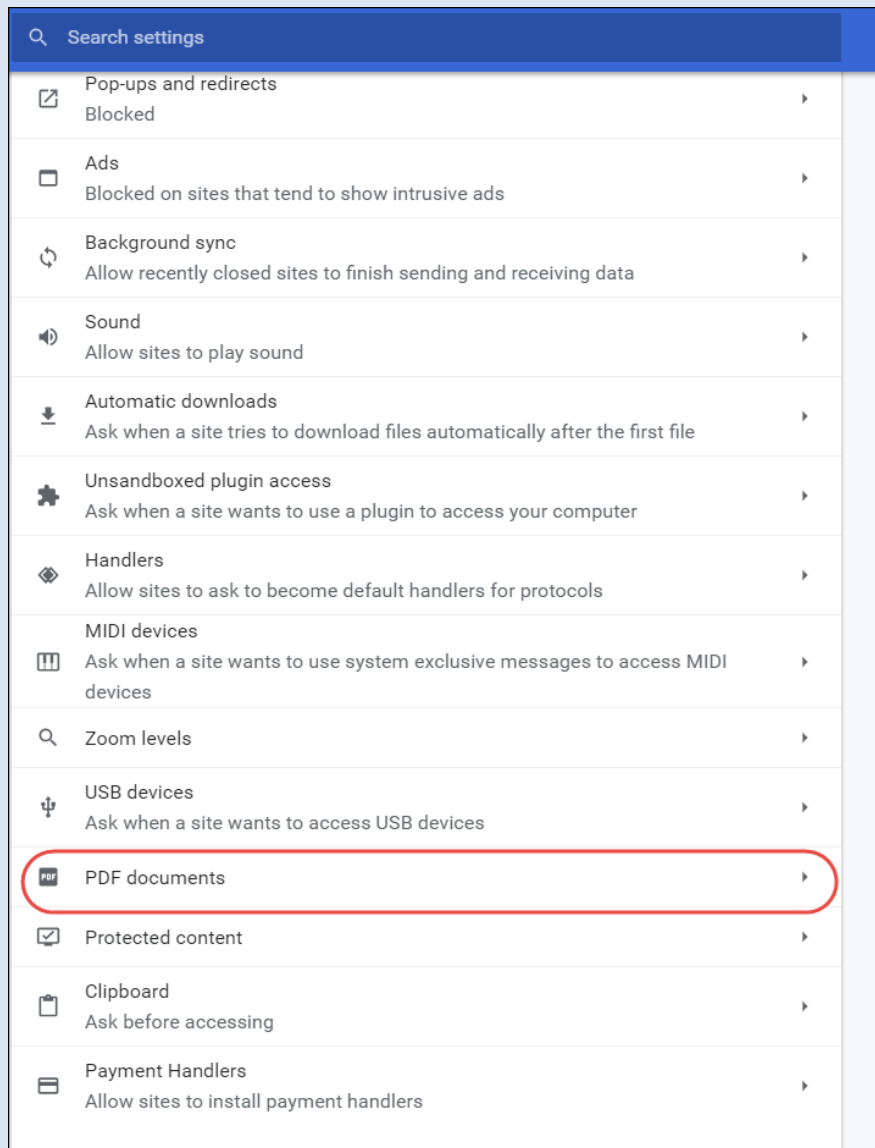
C:\Users\csimpson\Downloads

Change

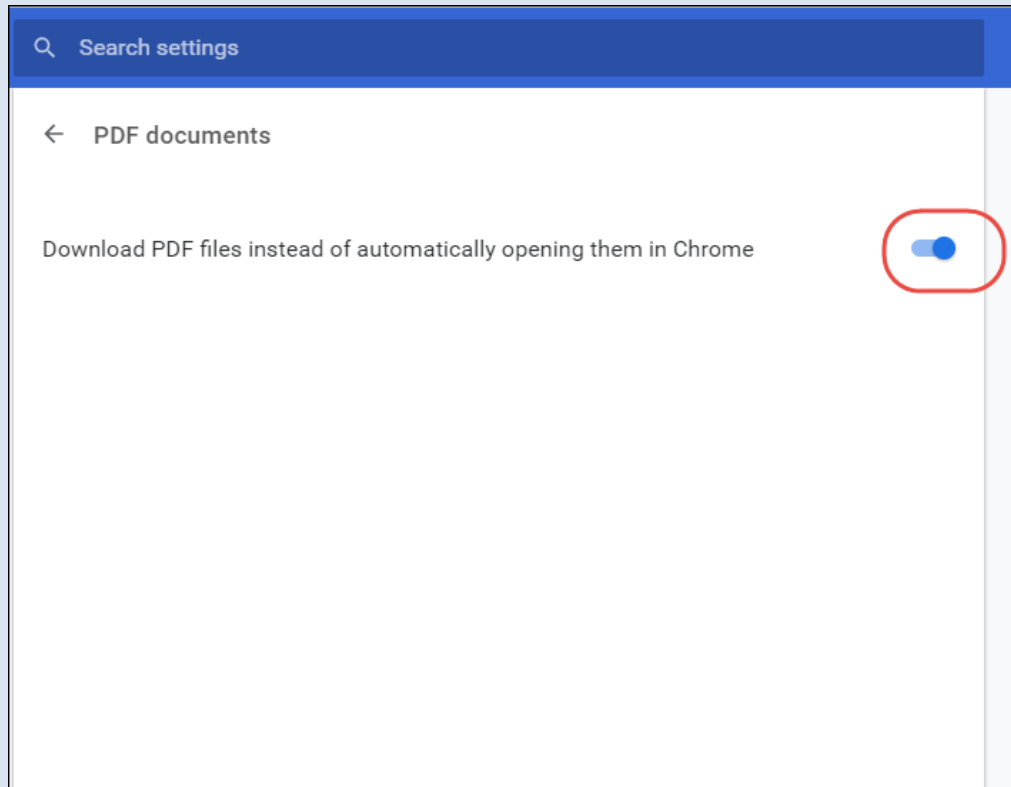
Ask where to save each file before downloading



6. Click on pdf documents



7. Make sure Download PDF files instead of automatically opening them in Chrome is set on 'ON' (tab on the right should be blue)



8. Close the 'Settings' tab (opened in step 2 above)

Now pdf documents that are downloaded from a website will remain on your task bar in the bottom left corner of your screen. You can simply drag and drop documents from this location to the '*drag & drop file(s) here . . .*' window when saving documents to a file as outlined above.

- Incident
- Critical Deadlines
- Court
- Calendar
- Disbursements
- Case Value
- Critical Comments
- Documents
- Emails
- Investigations
- Court Rules
- Negotiation/Settlement
- Notes
- Photographs
- Retainer/Referral
- Client Portal
- Tasks
- Timeline
- WorkPlans
- Caption
- Case UDF
- Plaintiff
- Medical Providers
- Insurance
- Vehicles
- Employment
- Injuries
- Other Providers
- Adverse Exams
- Injuries-Prior
- Medical Providers-Prior
- School/Other Activities
- Special Damages
- Attorneys

	Closed	Closed Case	11/2/2018 (3 days)		
	M1 - Case Rank	A - Top Case	10/29/2018 (7 days)		
	M2 - Treatment	Treatment Ended	10/29/2018 (7 days)		

Incident Date	4/10/2018	Case State	New York
Open	7/2/2018	Office	New York
Wanted/Accepted Date		Estimated Value	Not Set
Retainer Date	7/2/2018	Liability Coverage/Code	\$200,000 / 100%
Expected Resolution		Total Settlement	\$650,000
Next Deadline	4/20/2018	Next SOL	5/10/2018

Paid Advertising Cablevision
Serious Injury Other Cases Liens

Edit Case

Staff

Case Manager	Blidy, Nataliya
Primary Attorney	Simpson, Claude, Esq.
Primary Paralegal	DeJesus, Lourdes
Investigator	Beez, Dayhanara

Pending Appointments

8/21/2018	Court Appearance - Post Settlement Motion	Motion to approve distribution
8/23/2018	Court Appearance -	
9/26/2018	Motion-	
10/19/2018	Pre-Trial Conference Call -	

Add New Document(s)

Drag & Drop file(s) here...

Click here to browse files...

Uploaded Files

Courts / Dockets

Supreme Court New York County	2018-63546 (5/2/2018)	Judge: Smith, Jacob			
			No Fault Deadline	4/20/2018	Deadline to file MV-104
			Hinds, Mandy	5/10/2018	Deadline to File No-Fault Application
			Hinds, Mandy	5/10/2018	
			Hinds, Mandy	8/24/2018	Interrogatories received from defendant

Plaintiffs

Plaintiff	#	Primary	Role	Phone #	Insurance Co.	Adjuster	Coverage	Law Firm
Hinds, Mandy (French, English)		Plaintiff/Contact	(P)-Owner/Operator	(222) 222-2222	MetLife Auto and Home (No Fault Primary) Claim #: 51463514 No Fault Policy Limits: \$50,000 / \$250,000 UM/SUM Limits: \$50,000 / \$50,000	Imran, Shiloah	\$200,000	

Defendants

Defendant	#	Role	Insurance Co.	Adjuster	Coverage	Law Firm
Ramirez, Juanita		(D)-Operator	GEICO (Liability Primary) Claim #: HY203984	Lewis, Stacy	\$100,000	Premier Defense, LLC

complaint_examp.pdf ^

Show all X