

Creating a Service List

Version 11 and higher

TrialWorks is designed to allow users to automatically serve all Attorneys on the Service List via email and/or written document. It is also useful to have a printed copy of the Service List for an attorney in court, so that all case-related attorney names/firms/phone numbers and who they represent are readily available. Here's how to do it:

User Tools Default Settings

Generating a written Service List in TrialWorks requires a Certificate of Service template and a few basic settings. Before getting started, please note that you need to have a Certificate of Service template already setup and ready to use so the Certificate of Service points to that template. Go to User Tools > Default Values > Template Settings: Select the name of the template (e.g., "Service List") from the Certificate of Service dropdown options. This will be your default template, when generating a Service List from the Pleadings Tab.

SET DEFAULT VALUES

PLEASE SELECT THE FOLLOWING TRIALWORKS SYSTEM WIDE DEFAULTS FOR THIS USER

OK

Summary Calendar

User Settings and Help Case List Filters **Template Settings** Calendar and Contact Settings Global Settings (Read < >

Tab Name	Default Category	Default Template
Miscellaneous		
Appeals		
Correspondence	Client	Client letter of Representation
Deposition		
Email		
Discovery	Interrogatories	
Medical	Records Request	Medical Records Request
Memo		
Hearings		
Pleadings	Complaint	
Subpoena		
Experts		

Document Storage Location: T:\DianeCaseFiles\

Certificate of Service: **Service List**

Use Dymo Label Printer ☐

Dymo Template Path:

TrialWorks LLC

Tel 305.357.6500
Fax 305.357.6499

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Coral Gables, FL 33146

<http://www.trialworks.com>
training@trialworks.com



Other Parties Tab Settings

From the Other Parties Tab, check the box next to “Include in Service List” those attorneys who belong on the Service List. In doing so, the Attorneys who are included will be identified with a “Yes” in the Service List column (see images below.) Notice that you can distinguish the Attorney’s *personal* email from the *service email* that belongs on the Service List. You may also include multiple email addresses on the Service List by separating the email addresses with a semi-colon.

The screenshot shows a form titled "Other Party Attorneys" with a green header and a red close button. The form contains the following fields and values:

- Atty Name: Joe B. Lawyer, Esq.
- Firm Name: Law Offices of Joe Lawyer, P.A.
- Atty Bar No: 46372
- AttyAddr.: 765 Auto Speedway
- AttyEnv.:
- City, ST Zip: Riley MI 48041
- Atty Tel #/Fax #: (313) 555-1214 (313) 555-1215
- Atty File No: 86-4433
- Atty Email: Enter Attorney Individual Email Address
- Atty Service Email: Enter all emails that need to be included on the Service List. Separate multiple addresses with a semi-colon.
- Atty County: Countyville
- Atty Gender: Male
- Include in Service List: ☒

At the bottom of the form, there is a button labeled "Add Atty to Contacts" and a button with a right arrow icon. The footer of the form shows "Record: 1 of 1", a "Filtered" status, and a "Search" button.



Attorneys:			
Attorney Name	Firm Name	Service List	
Joe B. Lawyer, Esq.	Law Offices of Joe Lawyer, P.A.444	Yes	+
Walter E. Disney, Esq.	Disney World, Inc.	No	

Generate a written Service List

From the **Pleadings Tab**, you will see the Service List button at the bottom of the screen. Simply click on the Service List button to generate a Service List for your case. This will pull the Certificate of Service template as linked in your User Tools > Default Values, thereby creating the written Service List.

+		Service List	Pleading Reports	TW Docket	Task	Calendar	Internal Email	X
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Create Email Service List

TrialWorks also allows you to send an email to all the Attorneys that are associated with the Case by using the “Serve All Attorneys on the Service List” and/or “Email All Attorneys on the Service List” from your Email Menu. What’s the difference?

Home > New

FILE	Home	Cur
New	Address Book	Calls
Call		
Chat		
Docket		
Email		
Fax		
Mailing Wizard		
Note		
Time Entry		
Case		
Intake		



Select Case > Select Documents > Select Recipients > Sent Email

E-mail Form

E-MAIL MENU

(1) Select Case: Looney, Mary Jane v. ABC Moving, Inc.

(2) Select Documents:

Link	Addl	More	Other	Doc Date	Tab	Subject	Link	Additional Lir
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/18/2017	Pleadings	Bookmarked sample - Pleadings Style	Bookmarked	loc
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/15/2017	Pleadings	Answer to Complaint	Answer to C	loc
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/26/2017	Pleadings	Complaint	Complaint	loc
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8/15/2017	Pleadings	Complaint	Complaint	loc

Record: 14 of 5 of 5 Filtered Search

(3) Select Email Template: Category: General Template:

Select all documents you would like to include with this e-mail.

(4) Select Recipients:

Selected	Contact Name	EmailAddress
<input type="checkbox"/>	All, Tell	donttellit@none.com
<input type="checkbox"/>	Dangerous, Rodney R	rodney@dangerousdoct
<input type="checkbox"/>	Disney, Walter E.	wdisney@none.com#ma
<input type="checkbox"/>	Hospital of the Univer	info@hospital.com
<input type="checkbox"/>	Lawyer, Joe B.	oppcouns@net.com.org

Record: 14 of 5 of 5 No Filter Search

Select all the recipients you would like to send this e-mail to.

☒ Select Recipients ☐ Email All Attorneys on the Service List

☐ Serve All Attorneys on the Service List

(5) Choose Options (optional):

Send as PDF?

☐ Yes - Using Adobe ☐ Include Coversheet

☐ Yes - Using Word Perfect ☐ Yes - Using Word 2007

☒ No

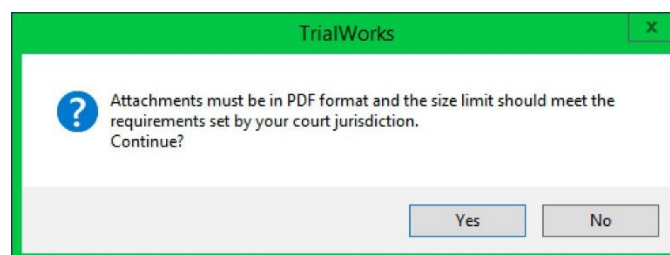
Attach documents as?

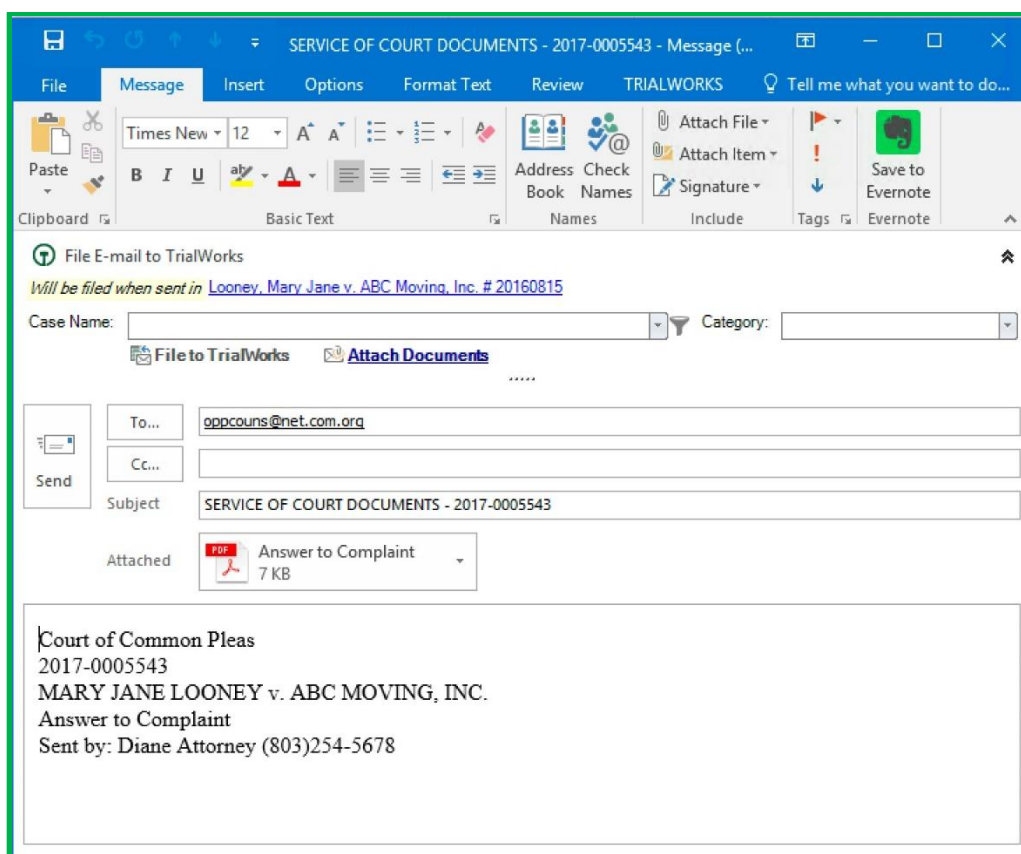
☒ Multiple Individual files ☐ Single Compressed (zipped) Folder

☐ Send Internal Mail

Send E-mail

- **Serve All Attorneys on the Service List** - An alert message will automatically pop-up advising that the documents will be converted to .pdf, and this option will then automatically launch an email form pursuant to service requirement rules, including the Subject, Caption Information, List of Documents attached, and the Filer's contact information (see image below):





- **Email All Attorneys on the Service List** - This option will automatically launch an email including all of the attorneys identified in the Service List pre-populated in the “To” field. Use the E-mail Multiple Documents icon by going to Home>New>Email.
 - Choose your document(s) being served. You can choose to send your word processing document as PDF using the option to convert using Adobe Acrobat, WordPerfect or Word2007 (rules require a PDF document be served).
 - Click the Serve All Attorneys on the Service List and click Send E-mail and your Outlook e-mail will be created including the e-mail address for all Recipients with the required formatting.



E-mail Form

E-MAIL MENU

(1) Select Case:
 Philips, Robert v. Anderson, Aaron

(2) Select Documents:

Link	Addl	Mon	Other	Doc Date	Tab	Subject	Link	Addition
				4/29/2009		Correspon To:		
				4/28/2009		Correspon To: Smith, Andrew W. Req for In	Req for Ins	
				12/16/2008		Correspon To:		
				5/6/2007		Correspon To: . Bookmark Test	Bookmark	
				12/29/2006		Correspon To: . Demand Letter	Demand L	
<input checked="" type="checkbox"/>				6/3/2003		Correspon To: Philips, Bob. Affidavit Cover I	Affidavit C	
<input checked="" type="checkbox"/>				6/3/2003		Correspon To: Philips, Bob. Affidavit Cover I	Affidavit C	
				11/21/2017		Costs		
				8/17/2017		Costs		
				6/19/2017		Costs	Airfare for onsite training	

Records: 4 of 400 of 1002

(3) Select Email Template:
 Category: General Template:

Select all documents you would like to include with this e-mail.

(4) Select Recipients:

Selected	Contact Name	EmailAddress
<input checked="" type="checkbox"/>	ABC Insurance (A/P Samantha@acorn.co	
<input type="checkbox"/>	Abrams, Seth C. abrams@anylaw.co	
<input type="checkbox"/>	Andrews, Karl (US/ kandrews@usaa.non	
<input type="checkbox"/>	Arias, Mike marias@aoqllp.com	
<input type="checkbox"/>	Boies Schiller & Flaczak@befe.com	

Records: 1 of 21

Select all the recipients you would like to send this e-mail to.

☐ Select Recipients ☐ Email All Attorneys on the Service List
☒ **Serve All Attorneys on the Service List**

(5) Choose Options (optional):

Send as PDF:
☐ Yes - Using Adobe
☐ Yes - Using Word Perfect
☒ Yes - Using Word 2007
☐ No

Attach documents as?
☒ Multiple individual files
☐ Single Compressed (zipped) Folder
☐ Send Internal Mail

Send E-mail

Re: Looney, Mary Jane v. ABC Moving, Inc. - Message (HTML)

File Message Insert Options Format Text Review TRIALWORKS Tell me what you want to do...

Paste

Clipboard Basic Text Names Include Tags Add-ins Evernote

To... oppcouns@net.com.org

Cc...

Subject Re: Looney, Mary Jane v. ABC Moving, Inc.

Attached Answer to Complaint 16 KB

Service List Bookmarks

There are several style designs from which to choose to create your Certificate of Service List, as follows:



AllAttys	Law Offices of Joe Lawyer, P.A.444 Joe B. Lawyer, Esq. 765 Auto Speedway Riley, MI 48041
AllAttysServiceEmail	oppcouns@net.com.org,
AllAttysWrap	Joe B. Lawyer, Esq., Law Offices of Joe Lawyer, P.A.444, 765 Auto Speedway, Riley, MI 48041.
AllAttorneys	Joe B. Lawyer, Esq. Law Offices of Joe Lawyer, P.A.444 Attorney For: Driver of the Truck 765 Auto Speedway
AllAttysGroupby	Joe B. Lawyer, Esq. Law Offices of Joe Lawyer, P.A.444 765 Auto Speedway Riley, MI 48041
AllAttorneysGroupFirm	Joe B. Lawyer, Esq. oppcouns@net.com.org Law Offices of Joe Lawyer, P.A.444 765 Auto Speedway
AllAttorneysName	Joe B. Lawyer, Esq.
AllAttysGroupNum	Joe B. Lawyer, Esq. Law Offices of Joe Lawyer, P.A.444 765 Auto Speedway Riley, MI 48041
AllAttysFax	Joe B. Lawyer, Esq. - 313-555- 1215

