



SOUNDPATH ONLINE QUICK REFERENCE GUIDE

Soundpath Online is a user-friendly, enterprise-level reporting and account management platform designed specifically for law firms. *With Soundpath Online, administrators can generate custom and up-to-date billing and usage reports on demand, and conveniently request account changes online. All Soundpath Online reports can be easily downloaded in Excel, printed, or e-mailed to a client or colleague.*

Logging In

Access Soundpath Online at <http://www.soundpathonline.com> by entering your User Name and Password. If you do not have this information, please contact Customer Services.

Access Levels

There are a variety of access levels to Soundpath Online. Logins can have access to all features, only management features or only billing features. If a link is grayed out in the dropdown or is not active on the homepage, you do not have access to it.

Logins can also be created to have access to only specific offices/branches. In this case, you will only be able to view invoice, usage and moderator data for the office(s) you have access to. Logins with limited office access can not access the Download Moderator Report tool. To view a list of active accounts, the Generate Moderator Report feature is available.

For more information about Soundpath Online access levels, please contact your company's internal admin or contact Customer Services.

Billing and Usage reports

Invoices

The Invoices tool allows you to query all previously billed charges and create customized reports. The Invoices tool can help your company analyze budget needs, office usage and attorney usage. Invoice Reports contain the following fields: Description, First Name, Last Name, Office Code, Employee Code, Date of Call, Call Start, Number of Callers, Minutes, Charges, Billing Code, Invoice Date and Invoice Number.

Instructions:

Select an invoice date range and filter the data by moderator, office code, employee code, or billing code (client matter numbers). Use the Select All option or highlight particular items in the list. Filter the data further by using the "Narrow Search" button, or create a report by clicking the "Generate Report" button.

Once the report has been generated you may download a copy of the report in Excel by clicking on the "Download Report" button, view a printer-friendly version of the report with the "Print Report" button, or email the report as an Excel attachment by clicking on the "Email Report" button.

Participant-Level Call Details

Participant-Level Call Details allows you to query reservationless usage, both billed and unbilled. Call Details includes participant phone numbers and the call duration for each participant. The usage information is updated daily. The summary level reports contain Moderator Name, Office Code, Employee Code, Conference ID, Number of Callers, Call Start, Call End, Minutes, Pre-Tax, Taxes and Fees, Total Charges, and Billing Code. The participant-level details also contain Conference Role, Phone Number and duration and charges broken down by participant. Note: Participant-Level Call Details contains data for the previous three months, to view usage information prior to this time frame, click the "Archive data" link in the top-right-hand corner.

Instructions:

Select a date range and filter the data by moderator, office code, employee code, or billing code (client matter numbers). Highlight items in the list and create a report by clicking the "Generate Report" button. The generated report will display

summary level information for all calls that matched your query, in descending chronological order. To see participant-level call details for a particular call, click the corresponding “Show Details” button. You may download a copy of the report in Excel by clicking on the “Download Report” button, view a printer-friendly version of the report with the “Print Report” button, or email the report as an Excel attachment by clicking on the “Email Report” button. The Excel reports contain the participant-level details for each call.

Account Management

Add Moderators

The Add Moderators form allows you to conveniently request the creation of new conferencing accounts. Soundpath’s Customer Service department will quickly turn-over your request and email the ready-to-use account information.

Instructions:

Fill in your Name, Phone Number and Email at the top of the form. Add any special instructions, if applicable. Fill out the remaining fields with the information for the first account that you would like to be created. The First Name, Last Name, Phone Number, Time Zone, Location/Branch, and Email are required. The Employee/Timekeeper Code, Billing Code/Cost Center Code, and Assistant Information are optional. To clear the moderator form, click the “Clear” button. Once the information has been accurately filled out, hit the “Add to Request” button.

The moderator information will be added to a request table at the top and the form will be cleared. Fill out the moderator information for each new account you would like to be created. To change information already added, highlight the request in the table and use the “Edit” or “Remove” buttons. Once you have added each new account, click the “Submit All” button. Customer Service will send confirmation once the request has been received and processed.

Delete Moderators

The Delete Moderators form allows you to request existing accounts to be deactivated.

Instructions:

Fill in your Name, Phone Number and Email at the top of the form. Add any special instructions, if applicable. Fill out the Moderator’s Name and enter the corresponding User ID or Passcode and click “Add to Request.” If you do not have this information, click the “Search” link. Fill out one or more fields in the Search

form and click “Search.” The search results will be displayed. Use the previous and next arrows to scroll through the results. Once you have found the account you would like to be deactivated, hit the “Add to Request” button.

The moderator information will be added to a request table at the top and the form will be cleared. Fill out the form or search for the next account to be deactivated. To change information already added, highlight the request in the table and use the “Edit” or “Remove” buttons. Once you have added each moderator deletion, click the “Submit All” button. Customer Service will send confirmation once the request has been received and processed.

Request Materials

Request Materials allows you to easily request new hard-copy materials for users that have lost their account information.

Instructions:

Fill in your Name, Phone Number and Email at the top of the form. Add any special instructions, if applicable. Select the type of hard copy materials you would like to order. The Moderator packet contains a new wallet card for the moderator as well as a Secretary Packet. The Secretary Packet does not contain a wallet card. If you would also like the moderator or secretary to be contacted for a quick 3-5 minute training session, fill out the appropriate information. Enter the Moderator Name and Passcode, and Secretary Name and Mail to fields, if applicable. If you do not have this information, click the “Search” link. Fill out one or more fields in the Search form and click “Search.”

The search results will be displayed. Use the previous and next arrows to scroll through the results. Once you have found the correct account, hit the “Add to Request” button. The moderator information will be added to a request table at the top and the form will be cleared. Fill out the form or search for the next account. To change information already added, highlight the request in the table and use the “Edit” or “Remove” buttons. Once you have added all of the requests, click the “Submit All” button. Customer Service will send confirmation once the request has been received and processed.

Request Training

The Request Training form allows you to request training for any individual on the reservationless audio conferencing system. A trainer will call each individual(s) and provide a three to five minute hands-on demonstration of the conferencing service.

Instructions:

Fill in your Name, Phone Number and Email at the top of the form. Add any special instructions, if applicable. Enter the Name and Phone Number of the person who would like training and click “Add to Request.” The information will be added to a request table at the top and the form will be cleared. Fill out the form for each person you would like to be trained. To change information already added, highlight the request in the table and use the “Edit” or “Remove” buttons. Once you have added each training request, click the “Submit All” button. Customer Service will contact each individual for a training session.

Account Info

Download Moderator Report

The Moderator Report is an Excel spreadsheet of all of your company’s active accounts, ideal for audits and recordkeeping. It contains the following information: Company, First Name, Last Name, User ID, Moderator Passcode, Participant Passcode, Toll Free Dial-In, International Dial-In, Employee Code Billing Code, and Web Password (Simplicity Plus/Simplicity Outlook Plug-In Password). The moderator information is updated daily.

Instructions:

To retrieve the full list of your company’s conferencing accounts, click the “Moderator Report” hyperlink. An Excel spreadsheet of the data is then available to be downloaded to your desktop.

Generate Moderator Report

The Generate Moderator Report tool allows you to create a moderator report by office/branch. This report contains the same fields as the Download Moderator Report feature.

Instructions:

Select the office(s) you would like to create a moderator report for and click “Generate Report.” You may download a copy of the report in Excel by clicking on the “Download Report” button, view a printer-friendly version of the report with the “Print Report” button, or email the report as an Excel attachment by clicking on the “Email Report” button.

Individual Account Info

Recording your Audio and Web Conference

Individual Account Info allows you to search for specific accounts, providing instant access to misplaced account info. The Account Info displays Moderator Name, Company Name, User

ID, Web Password (Simplicity Plus/Simplicity Outlook Plug-In Password), Employee Code, Time Zone, Dial-In Numbers, Moderator and Participant Passcodes, Conference Features and Billing Code. The account information is easily emailed to users directly from the system. The emails contain Moderator Name, Dial-In Numbers, Moderator and Participant Passcodes and Conference * Features.

Instructions:

Fill out one or more fields in the Search form and click “Search.” The search will be displayed. Use the previous and next arrows to scroll through the results. Click the “Email Info” button to email the account information directly to a user or secretary. If you would like to order new hard copy materials for the moderator, click the “Request Materials” button and click “Submit All” on the Material Request form. To deactivate the account, click the “Delete Moderator” button and click “Submit All” on the Delete Moderators form.

More Information

For more information, contact Customer Services via EUCustomerServices@Soundpath.com; or call +353 (0)23 88 32473 or +44 (0)207 0199 535