# GroupFund
Legal

EffortlessLegal

Summary

- A confidential and easy-to-use platform to raise funds
- Divide the cost of an otherwise expensive project
- Privately invite potentially large numbers of participants to share the cost of a project
- Manage and keep track of responses
- The potential use cases are endless

Overview

- Where to Begin
- Email Templates
- Contacts
- Email Lists
- Creating a New Project
- Domain Settings
- Client Billing
- Integration Bars

Where to Begin

GroupFund Legal is launched from the EffortlessLegal dashboard. To begin, a user will need to sign up with an account, and can then log in to the dashboard from the EffortlessLegal homepage. Input your credentials, and you will be directed to the dashboard as shown below. Select GroupFund Legal, or purchase the app if you have not done so already. If you would like to learn more on how to create an account with EffortlessLegal, click here!
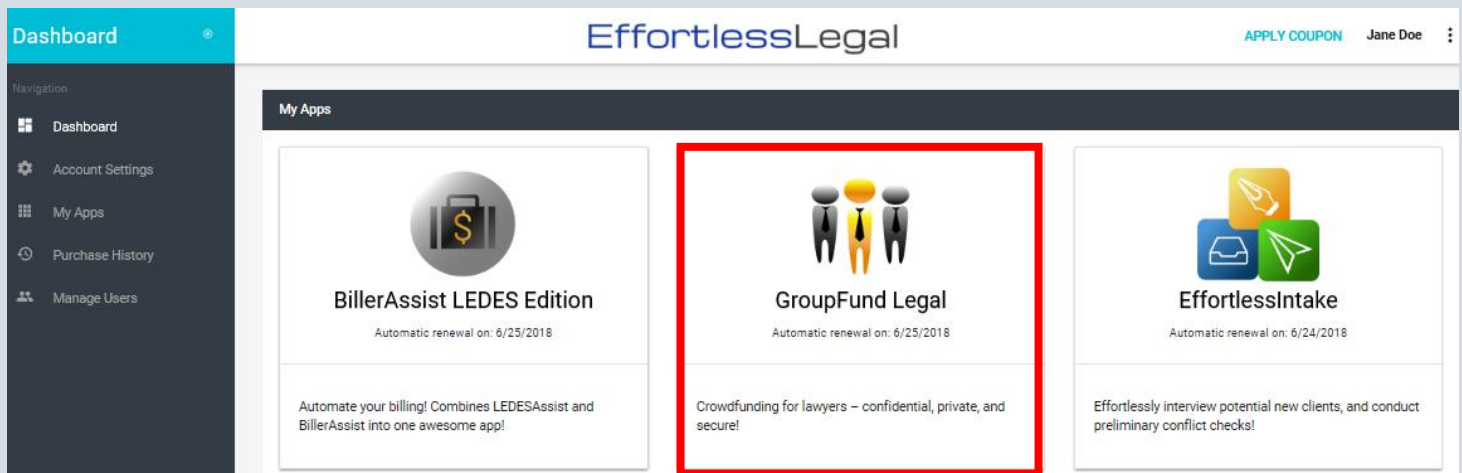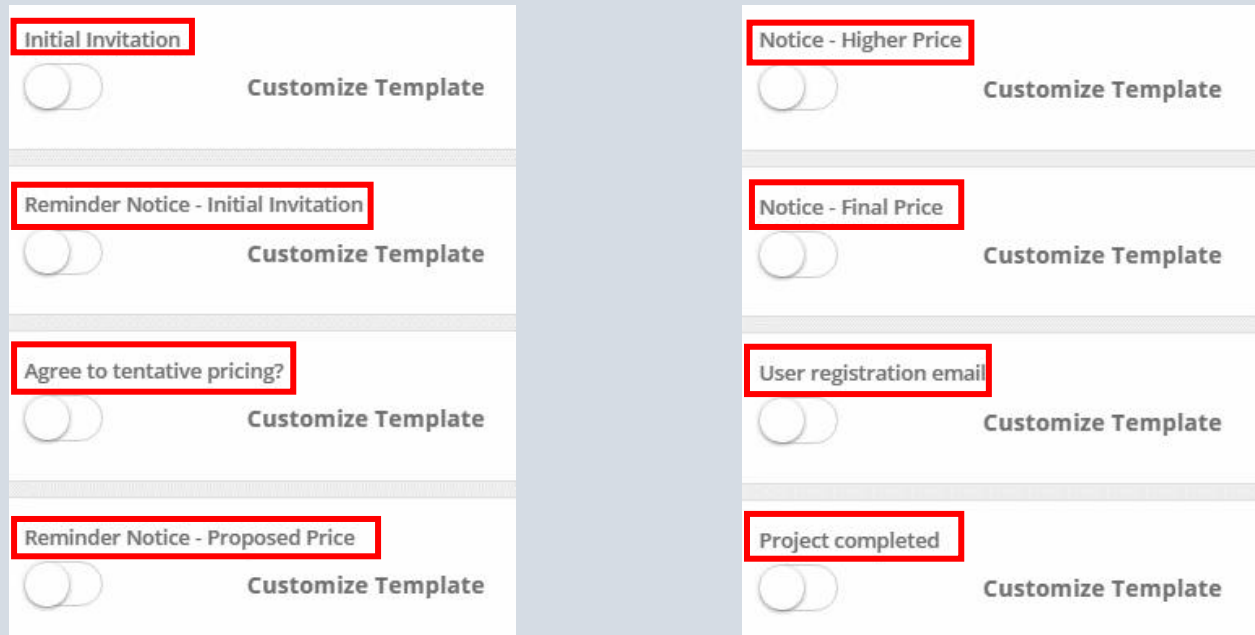

Email Templates

Prior to creating your crowdfunding project, you can personalize the text and appearance of the various emails that will be sent for your project. To change the appearance, go to "Email Templates" in the navigation menu and select any of the "Customize Template" buttons below.

1. To change the appearance of the email and the location, edit the text boxes below, and then click the "Update Template" button or "Update Logo" to change your logo.

2. You can update the email template that will be sent to participants. Below, you will see the various email options that are customizable. Each email template differs slightly depending on which part of the project you are at and the email that is sent with it.

Initial Invitation
Customize Template

Notice - Higher Price
Customize Template

Reminder Notice - Initial Invitation
Customize Template

Notice - Final Price
Customize Template

Agree to tentative pricing?
Customize Template

User registration email
Customize Template

Reminder Notice - Proposed Price
Customize Template

Project completed
Customize Template

3. In this example, let's select the toggle button to activate the "Initial Invitation." You can now edit the email's project title and the body of text in addition to the color and font feature displayed earlier. Select "Update Template" to complete once edited.

Initial Invitation

Customize Template

New GroupFund Project: [Project Title]

We are excited to announce a new GroupFund project!

A short description of the project appears below. To see the complete project description and other details, please click the "More Info" button below.

The cost of the project will be confidentially shared among a number of different people. If more people participate, the price goes down for everyone!

If you are interested in participating, please click the button below. You will have no obligation to pay anything until you commit to the price per participant. The price per participant will be announced later.

Update Template

GroupFund
Legal

We are excited to announce a new GroupFund project!

A short description of the project appears below. To see the complete project description and other details, please click the "More Info" button below.

The cost of the project will be confidentially shared among a number of different people. If more people participate, the price goes down for everyone!

If you are interested in participating, please click the button below. You will have no obligation to pay anything until you commit to the price per participant. The price per participant will be announced later.

INTERESTED

PROJECT DESCRIPTION:

[Executive Summary/Project Summary]

MORE INFO

**GroupFund**
Legal

(800) 427-5510

Effortless Legal LLC
105 W. Madison Street
Chicago, IL 60602
USA

You can do this for each of the optional eight emails that can be sent.

Contacts

Once you have created your email templates prior to creating your project, you can import your contacts to whom your project can be sent, as well as create an email list.

1. To begin, select "Contacts" in the navigation menu. You will see options to import your contacts. Each option will automatically upload your contacts to GroupFund Legal; the contacts appear below the search bar.
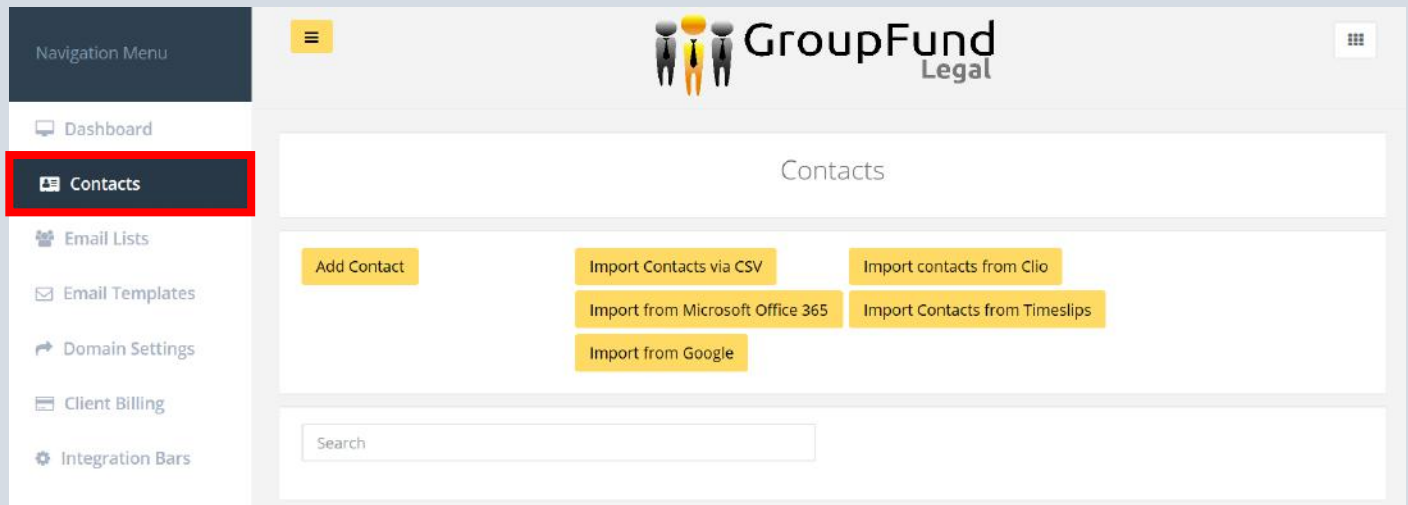
2. Some of the options to import your contacts differ slightly. For instance, if you choose Microsoft Office 365, Google or Clio, a new browser will appear asking you to log in and to grant access to import your contacts.
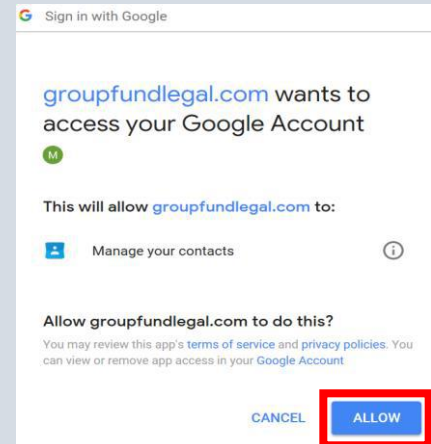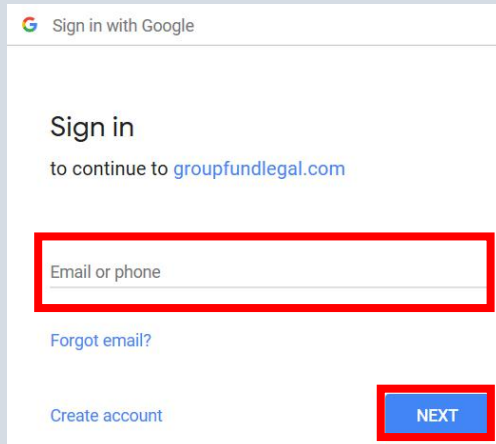
Microsoft Office 365

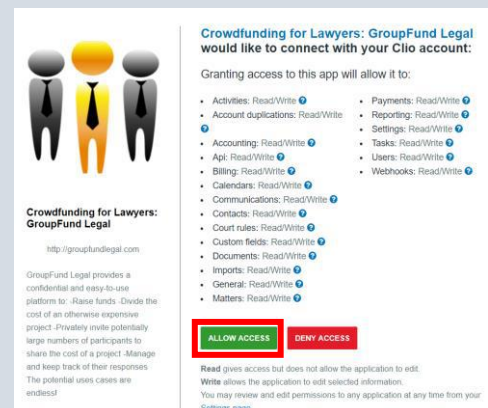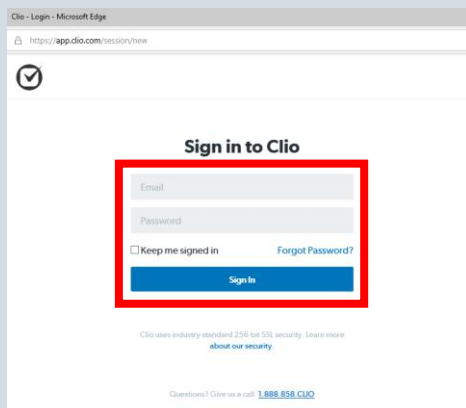- Input your credentials and click "NEXT" and then click "Accept" to begin!
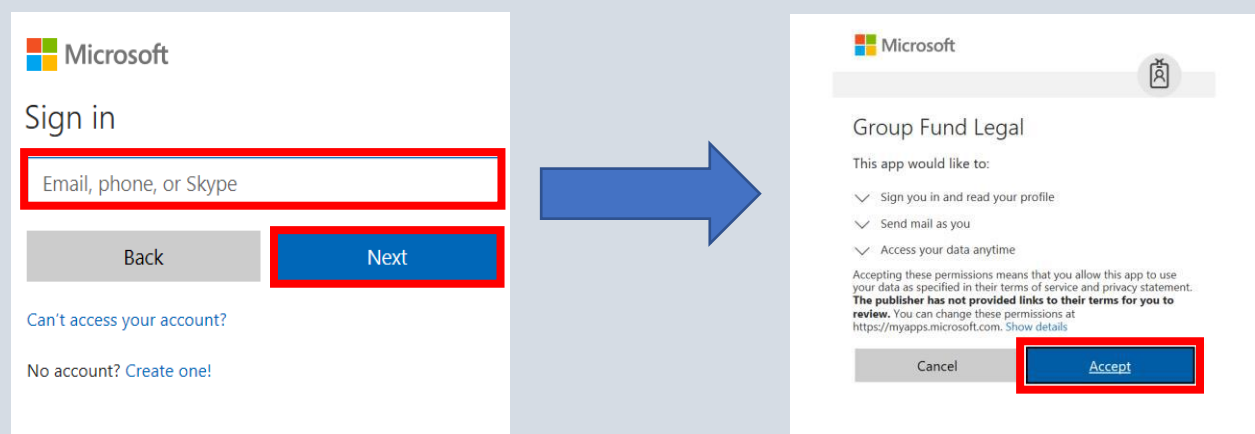
Google

- Input your email or phone number, click "NEXT" and then click "ALLOW" to begin!

Clio

- Input your credentials and click "Sign In" and then click "ALLOW ACCESS" to begin!

- For each option, you will return to GroupFund Legal upon authorizing access and a window will appear with your contacts. Choose which contacts you would like to import from the selected option and select "Add Contacts."

17	john@doe.com	John Doe	☑
18	prime@g.com	Optimus Prime LUX	☑
19	iman@gmail.com	Iron Man	☑

Cancel   **Add Contacts**

- Now, your imported contacts will appear below the search bar.

Search

#	Email	Full Name	Company/Organization	Status	Action
1	john@doe.com	John Doe		Subscribed	Edit Delete
2	prime@g.com	Optimus Prime LUX		Subscribed	Edit Delete
3	iman@gmail.com	Iron Man		Subscribed	Edit Delete

3. For importing contacts via CSV or from Timeslips, you will be asked to import your contacts in comma separated value or CSV files. Simply click or drag your CSV file for either option in the yellow box as shown below.

CSV

UPLOAD CSV

Many billing and practice management systems allow exporting of client and contact data via "comma separated value" or "CSV" files.

Please look online, check your billing software user guide, or call your billing software provider about how to export your clients and contacts to a "comma separated value" or "CSV" file.

When you have the exported CSV file from your billing software, you can use any spreadsheet program – such as Microsoft Excel – to edit the CSV file. The full name (i.e., first and last name) of your clients and contacts should be in Column A of the CSV file. The email addresses for the clients and contacts should go in Column B.

Here is a sample CSV file, with the data in the correct columns: Download Example

Then, all you have to do is press the "Import Contacts" option, and upload your CSV.

Click here to upload a CSV, or drag and drop your CSV file here

Timeslips

UPLOAD CSV

If you store email addresses for your clients and contacts in Timeslips, you can import that information using this option.

To do so, use the "Reports" function in your Timeslips installation to create a "Client Info Listing" report in "comma separate value (CSV)" format. You can then upload that report in CSV format by clicking the "Import Contacts from Timeslips" option here.

Click here to upload a CSV, or drag and drop your CSV file here

4. If you would like to manually add a contact, select "Add Contact" and provide the email, company/organization and full name, then click "Save."

Email*

test@gmail.com

Company/Organization

Testing Company

Full Name

Jane Doe

Save

Email Lists

1. To create an email list, select the "Email Lists" in the navigation menu and then select "Create Email List."
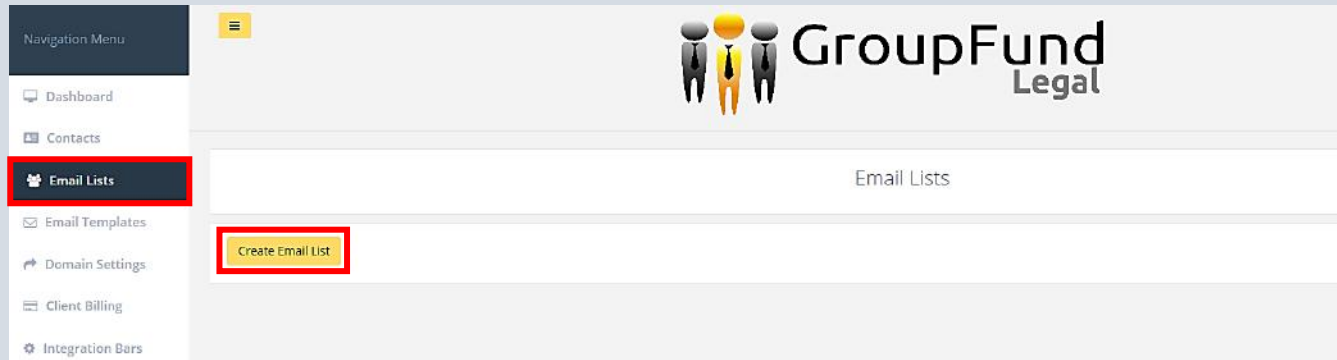
2. A form will appear that you can use to create your email list. Enter a name for the list and add the contacts that you uploaded from the previous step. Select "Save" to complete.

3. Your list is now ready to use and you can either edit it or delete it.

Creating a Project with GroupFund Legal

1. Now that you have created your email template, imported your contacts and created an email list, select "Dashboard" in the Navigation Menu and then "Create New Project" to begin.
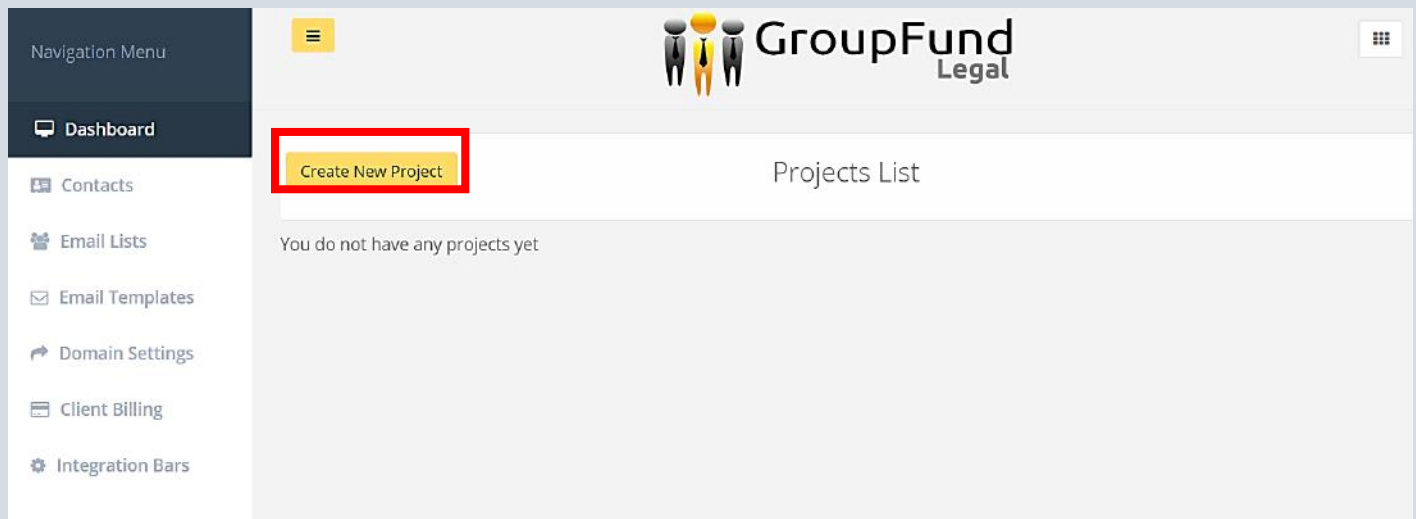
2. In Step 1, you fill out the required fields for your project's title, executive summary, and detailed information. If you have a document containing more details that you would like to attach to the project, simply drag and drop the file in the designated area.

3. You will also set the deadlines for the project in this step. There are 3 sets of deadlines that can be revised as you create the project.

- **Deadline for Invitees to Respond to Your Initial Email**

  A deadline for which invitees have to respond to your initial email in order to participate. Invitees will have no obligation to pay anything until you commit to the price per participant. The price per participant will be announced later.

- **Deadline On Which You Need Funding Confirmed**

  A deadline for invitees to confirm how much they would like offer in your crowdfund project. This amount is based on current participation levels. If everyone agrees to participate at this price, you will receive an email confirming this price as the final price per participant.

- **Project Completion Deadline**

  A final date for when your crowdfunding project will complete.

4. In step 2, input the amount of funds needed, the number of participants, and the payment details. In the example, we see that the project is asking for $8,000 and 20 participants are needed. The payment terms require that payment is due within 30 days of completion, with an initial payment of $100, and no refunds upon backing out.

5. Step 3 requires your preferences for the emails being sent. To see the information contained in each tab, click each option shown below. Each tab has a box that you can select to activate it.

- **Capping Participants at Quota**

  If you select this option, new participants will not be able to join your project after your quota is met. If you do not select this option, then by default: (1) new participants will be able to join your project after your quota is met; and (2) the price per participant for your project will be reduced proportionately to account for the additional participants.

- **Keep Price Per Participant if Quota Exceeded**

  If you select this option, the price per participant will not be changed, even if a new participant joins after your quota has been met. If you do not select this option, then by default: (1) new participants will be able to join your project at any time after the price per participant has been set; and (2) the price per participant for your project will be reduced proportionately to account for the additional participants.

- **Auto-Send Reminder Invitation**

  If you select this option, and if your desired number of participants is not met by the time your deadline for expressions of interest approaches, GroupFund Legal will automatically send a follow-up invitation to your invitees who have not yet responded. This follow-up invitation email will be sent automatically on the date you set below, if your desired number of participants is not met by that date.

- **Auto Send Reminder of Proposed Price**

  If you select this option, and if fewer than all of your participants have confirmed or declined your proposed price and terms by the time your funding deadline approaches, GroupFund Legal will automatically send a reminder email to your participants who have not yet responded. This follow-up invitation email will be sent automatically on the date you set below, if all of your participants have not responded by that date.

- **Auto-Reset Price and Resend Invite if Participants Back Out**

  If you select this option, and if one or more of your participants decline to participate at the price and terms sent to them, GroupFund Legal will automatically re-price (proportionately increase) the price per participant.

- **Email Alert Settings**

  This tab allows you to receive email alerts of material events and deadlines for your project.

- **Send Emails Copies**

  This tab sends you copies of all emails involved in the project.

6. In step 4, you will add the contacts you would like to participate in your crowdfund project. There are three ways to add a contact that we covered earlier. You can add from the contacts you imported, add a contact manually or select a list you created.

7. For this example, let's select "Add From Contacts" and you will see a window appear with your contacts. Select the contacts you would like to invite, and then "Add Contacts" to complete.

6	john@doe.com	John Doe	☑
7	prime@g.com	Optimus Prime LUX	☑
8	iman@gmail.com	Iron Man	☑

Cancel   **Add Contacts**

8. Finally, a Project summary of all the information that was filled out from Steps 1-4 will appear. From here, you can either save or launch the project. You can also edit the project if you want to change any information by clicking the red edit button on the top right-hand corner. To launch the project, simply press the "Launch Project" button.

Project Create

Create Project Steps

STEP 1   STEP 2   STEP 3   STEP 4   SUMMARY

Project Summary

⚡Edit

Title	Test Project
Executive Summary	Crowdfund
Detailed Info	Crowdfund with GroupFund Legal.
Deadlines	**Deadline for Invitees to Respond to Your Initial Email** - 06/21/2018 @ 2:59PM
	Deadline On Which You Need Funding Confirmed - 06/22/2018 @ 3:00PM
	Project Completion Deadline - 06/23/2018 @ 2:59PM
Funding Goals	$8,000.00
Desired Number of Participants	20
Payment Terms	Payments due within 30 days of completion. An initial payment of $100 is required and will not be refunded upon backing out.
Cap Participants at Quota	Disabled
Keep Price Per Participant if Quota Exceeded	Disabled
Auto Reset Price and Resend Invite If Participants Back Out	Disabled
Auto Send 'Last Minute' Reminder if Fewer Than All Participants Confirm at Proposed Price	Disabled
Auto Send Reminder Invitation Email	Disabled
Email Alerts	Disabled
Number of Interested Participants	0
Number of Confirmed Participants	0
Current Price per Participant	$8,000.00

Previous   Save Project   Launch Project

You can select any of the steps above to return back and edit. Selecting "Launch Project" will begin the crowdfund by sending emails to all participants. They will receive an email with detailed instructions for each step on how to participate in your crowdfund project.

Domain Settings

You can send GroupFund Legal emails from an email address you own. By default, all emails will be sent from an EffortlessLegal.com email address. However, GroupFund Legal is integrated with Amazon SES, a popular email delivery service. You can sign up for a free Amazon SES account at: https://aws.amazon.com

Amazon SES is easy to set up. Just follow the instructions on the Amazon SES website, and you'll be up and running in minutes. When you set up your account with Amazon SES, you will be provided with the information below. This will allow you to start sending emails from your own email address.

Access Key ID*

Field Required

[Add Key]

Secret Access Key*

Field Required

[Add Key Id]

Domain*

Field Required

[Add Domain]

Client Billing

You bill participants through your current billing system. You can do this via Clio, Timeslips or with other systems using a CSV file. Select "Client Billing" in the navigation menu and then select which option you would like to bill through as shown below.

***Note that you still need to send invoices and bill through your normal channels.

Clio

1. For confirmed participants, you will see their information appear in a new window. You can select if you would like to create a new client, create a new matter or to bill this row via Clio.

- Selecting "Create New Client" will automatically add the selected participant as a new client to Clio. You may need to provide additional information for the contact in your Clio account.

- Selecting "Create New Matter" will add this matter to your Clio account. First, select where you would like the matter to go and click "Proceed."

- "Bill this row via Clio" will place this entry as an expense within Clio. Select where you would like this to be placed within Clio and click "Proceed." The expense will appear in your "Activities" tab in Clio. You can edit the entry as needed.

CSV

1. Selecting "Bill via CSV" gives you the option to download your project as a CSV file directly in your browser. Select "Export to CSV" to complete. Open the window and the CSV file will appear with the information from your project. You can then use the CSV file with your current billing system.

Timeslips

1. "Bill via Timeslips" give you the option to create a client matter or bill this project in Timeslips.

#	Participant (Company)	Project (Price $)	Actions
1	John Doe John Doe Law Firm	Test Project 8000.00 $	Create Client-Matters in Timeslips ⓘ Bill This Project via Timeslips ⓘ

- Selecting "Create Client-Matters in Timeslips" allows you to create new client-matters in Timeslips for the confirmed participants in this project. A file will automatically download to your browser that contains the confirmed participants'' information.

  You will need to fill out Column A in the downloaded file with the "Client Nickname 1" information you wish to use, and Column B in the downloaded file with the "Client Nickname 2" information you wish to use.

  Then, you can use the "Import" (or "TS Import") function in Timeslips to add the Confirmed Participants as new client-matters in Timeslips. We include a sample import template that you can use for the "Import" or "TS Import" function in Timeslips.

A10			fx				
	A	B	C	D	E	F	G
1			test info	###	test info	test info	
2							
3							
4							

- Selecting "Bill This Project via Timeslips" allows you to create billing entries in Timeslips for all of the confirmed participants in this project. The file will automatically download to your browser.

  You will need to fill out Column C in the downloaded file with the "Client Nickname 1" information you wish to use.

  Then, you can use the "Import" (or "TS Import") function in Timeslips to add the Confirmed Participants as new client-matters in Timeslips. We include a sample import template that you can use for the "Import" or "TS Import" function in Timeslips.

A1			fx	Jane Doe			
	A	B	C	D	E	F	G
1	Jane Doe	########		EXP	glZ5gmqq	1	########
2							
3							
4							
5							

Integration Bars

1. To add Clio's integration bar, select the "Integration Bars" tab in the Navigation Menu. Select the toggle button next to "Show Clio Integration Bar" to activate.
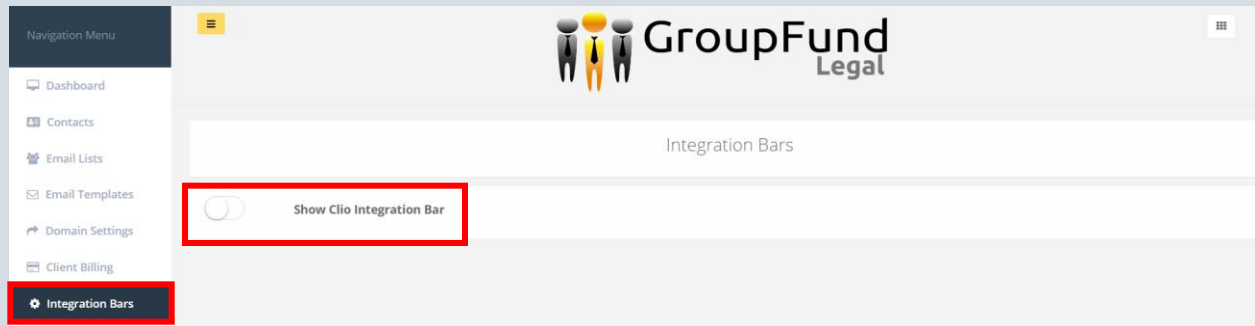
2. Clio's integration bar will then appear above EffortlessIntake's platform. You can now select any of the integrated tabs available in Clio's integration bar.
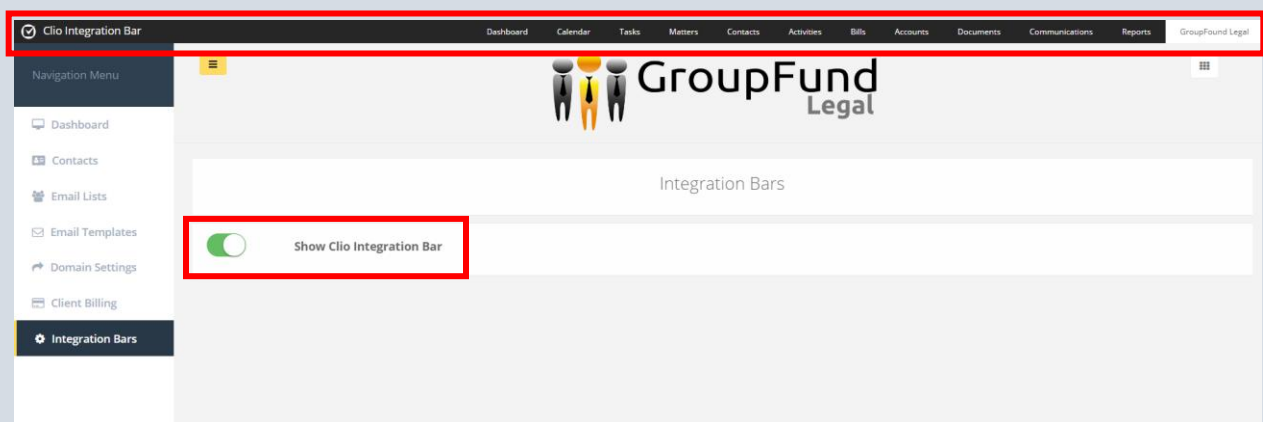
Conclusion

- Create your crowdfunding projects
- Set your funding goals
- Allows you to choose who you want to invite
- Set deadlines
- Launch your crowdfunding project

Resources

Troy's Video

FAQ