



DEVELOPMENT & TRAINING
FOR LEGAL PROFESSIONALS

Affinity Insight Course *Catalog*

Practical, on-demand training on the tools your firm uses—taught by the experts behind Affinity Consulting.

229

COURSES & MANUALS

8

SUBJECT AREAS

20+

INSTRUCTORS

JUNE 2026 EDITION

INSIDE THIS CATALOG

Contents

Explore practical training designed specifically for legal professionals. From AI and Microsoft 365 to document management, practice management, accounting, leadership, and more, these courses deliver real-world skills that improve efficiency, strengthen operations, and help your firm work smarter.

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SECTION 01

Artificial Intelligence & Emerging Technology

Artificial intelligence is reshaping how legal professionals research, draft, communicate, and manage information. These courses help you evaluate emerging technologies, understand practical applications, and adopt AI tools responsibly within a law firm environment. Explore practical use cases, ethical considerations, and productivity-enhancing workflows designed specifically for legal professionals.

FEATURED

AI & Emerging Tech

FEATURED COURSE

AI in Practice: A Legal Professional's Guide to Smart, Ethical Adoption

Explore practical ways to incorporate AI into legal work while addressing ethical obligations, confidentiality concerns, and professional responsibilities. Learn how to evaluate opportunities, manage risks, and use AI tools thoughtfully to support better outcomes for clients and your firm.

More Courses

AI Tools That Matter for Law Firms

Cut through the noise and evaluate AI tools based on real-world value, not marketing promises. Learn how to assess capabilities, identify meaningful use cases, and make informed technology decisions that support firm goals, client service, and operational efficiency.

ChatGPT Fundamentals for Legal Professionals

Build a strong foundation for using ChatGPT in legal work. Learn how to write effective prompts, generate more useful responses, and apply the tool to drafting, summarization, brainstorming, and research support.

[• ChatGPT](#)

Copilot Fundamentals: Getting Started the Right Way

Learn how to use Microsoft Copilot effectively from the start. Explore core features, practical use cases, and productivity-enhancing workflows across Microsoft 365 applications. Gain the confidence to incorporate AI-assisted tools into your daily work while maintaining accuracy and professional judgment.

[• Microsoft Copilot](#)

From Prompt to Practice: 30 Killer AI Prompts in 60 Minutes

Get more value from AI with a collection of practical prompts designed for legal professionals. Explore examples that support drafting, communication, organization, analysis, and daily law firm operations. Walk away with ideas you can immediately adapt to your own work.

From Resistance to Reinvention: Change Management for Law Firms in the AI Era

Successfully adopting AI requires more than technology. Learn strategies for overcoming resistance, building trust, and helping teams adapt to change. Explore practical approaches for creating a culture that embraces innovation while minimizing disruption and uncertainty.

Microsoft Copilot AI Solutions: How Can It Help Lawyers

Discover how Microsoft Copilot can support legal professionals across drafting, document review, communication, and task management. Learn where it delivers the greatest value, how it integrates with Microsoft 365, and what firms should consider when adopting AI-powered workflows.

• Microsoft Copilot

Quick Win: Faster Emails with Quick Parts and Copilot

Stop rewriting the same messages over and over. Learn how Quick Parts and Microsoft Copilot can work together to streamline email creation, improve consistency, and reduce time spent on routine communication without sacrificing quality or professionalism.

• Microsoft Copilot

Quick Win: Using Copilot to Triage a Busy Inbox

Spend less time sorting through email and more time focusing on meaningful work. Learn how Copilot can help summarize conversations, identify action items, and surface important messages so you can manage a busy inbox more efficiently.

• Microsoft Copilot

The AI Advantage: From Basics to Tools

Build a practical understanding of today's AI landscape and how it applies to legal work. Explore foundational concepts, emerging tools, and real-world use cases that can improve productivity, support better decision-making, and help you work more effectively.

SECTION 02

Professional Development & Leadership

Strong firms are built on more than technology. Develop the leadership, communication, productivity, and management skills needed to guide teams, improve operations, navigate change, and create a healthier, more effective law firm.

FEATURED

**Professional
Development**

FEATURED COURSE

Apply Lean Six Sigma to Your Law Firm: How to Rid Your Practice of Inefficiency and Waste

Identify inefficiencies that slow work, increase costs, and frustrate both clients and staff. Learn how Lean Six Sigma principles can help law firms streamline processes, reduce waste, improve consistency, and create more efficient workflows across the organization.

More Courses**Building a Culture of Accountability: Tools for Stronger Teams**

Create clearer expectations, improve follow-through, and address performance issues before they affect the entire team. Explore practical accountability frameworks that help leaders strengthen communication, build trust, and support better results across the firm.

Champagne Technology on a Beer Budget

Make smarter technology investments without overspending. Explore cost-effective tools, strategies, and purchasing approaches that help law firms improve productivity, enhance operations, and maximize value while working within real-world budget constraints.

Coaching to Grow Others: Practical Skills for Developing Your Team

Help employees reach their potential through effective coaching conversations and intentional development. Learn techniques for providing feedback, building confidence, encouraging growth, and supporting stronger performance across all levels of your organization.

DISC in Action: Understanding Yourself and Working Better with Others

Improve communication by understanding different behavioral styles and workplace preferences. Learn how DISC principles can help you navigate challenging interactions, strengthen relationships, reduce misunderstandings, and collaborate more effectively with colleagues and clients.

Design Thinking for Law Firm Leaders

Approach firm challenges with a more creative and client-centered mindset. Learn how design thinking can help uncover better solutions, improve processes, enhance collaboration, and create experiences that better serve both clients and team members.

Intentional Technology: Eliminating the Multitasking Trap

Constant interruptions and digital distractions can quietly undermine productivity. Learn practical strategies for using technology more intentionally, reducing context switching, and creating work habits that support deeper focus and better results.

Mastering Internal Communication in Law Firms: A Six-Part Series

Strengthen communication across your firm and reduce the misunderstandings that create friction and inefficiency. Explore practical techniques for delivering clear messages, navigating difficult conversations, and fostering stronger collaboration among attorneys and staff.

Mastering Stress and Workload Management in the Age of Information...

Reduce the impact of constant interruptions, competing priorities, and digital overload. Learn practical strategies for managing workload, maintaining focus, and creating sustainable work habits that support both productivity and well-being.

Navigating the Transition: Strategic Partner Succession Planning for Law...

Prepare for leadership transitions before they become business risks. Explore strategies for succession planning, client continuity, knowledge transfer, and long-term firm stability as senior partners move toward retirement.

Partner Compensation Systems: Structures, Shifts, and Strategy

Gain a clearer understanding of the compensation models law firms use to reward performance, encourage collaboration, and support strategic goals. Explore the advantages, challenges, and business implications of different compensation approaches.

Practicing Productivity: Time and Task Mastery for Legal Professionals

Develop practical systems for managing tasks, priorities, and competing demands. Learn techniques that help legal professionals stay organized, reduce overwhelm, and make consistent progress on the work that matters most.

Productivity Essentials for Legal Professionals

Build foundational habits that improve organization, efficiency, and focus. Explore practical approaches for managing workload, controlling distractions, and creating workflows that help you stay productive in a demanding legal environment.

Securing Your Law Firm: Practical Cybersecurity and Ethical Guidelines

Protect client information, reduce security risks, and strengthen your firm's cybersecurity posture. Learn practical safeguards, emerging threats, and ethical considerations that legal professionals should understand in today's technology-driven environment.

Take the Work Out of Your Workflow – A Case Study

See how workflow improvements can reduce manual effort, eliminate bottlenecks, and create more efficient processes. Through a real-world case study, explore practical ways to simplify work and improve operational performance.

The 26-Week Master Plan for Lawyers: From Chaos to Clarity

Create lasting improvements in productivity through a structured, long-term approach. Learn how to build better habits, strengthen time management skills, and make meaningful progress toward greater organization and control over your workload.

Time Management for Legal Professionals

Take greater control of your schedule and priorities. Learn proven time management techniques that help reduce stress, improve focus, and ensure important work receives the attention it deserves.

What's New in Legal

Stay current on the trends, technologies, management challenges, and market developments shaping today's legal profession. Join an ongoing discussion of the issues law firms are facing, the opportunities emerging in the industry, and the practical implications for firm leaders.

SECTION 03

Microsoft 365 for Legal Professionals

Get more value from the tools you use every day. Learn practical techniques for managing email, creating better documents, analyzing data, building presentations, and improving productivity across Microsoft 365. These courses focus on the features, workflows, and best practices that help legal professionals work more efficiently and produce higher-quality results.

FEATURED

Microsoft 365

FEATURED COURSE

Microsoft 365 Hidden Gems for Legal Professionals

● Microsoft 365

Discover powerful Microsoft 365 tools and features that often go unused in law firms. Learn how to improve collaboration, streamline communication, manage tasks more effectively, and get greater value from the technology your firm already owns.

Microsoft Word

Advanced Word Wizardry Series for Lawyers and Staff

Move beyond basic document editing and unlock Word's most powerful capabilities. Learn advanced techniques for automation, formatting, customization, and document management that support more efficient legal drafting.

● Microsoft Word

AutoCorrect – How to Take Advantage of and Customize It

Reduce repetitive typing and improve drafting consistency by customizing AutoCorrect. Learn how to create shortcuts for frequently used text, correct common errors automatically, and streamline document creation.

● Microsoft Word

AutoText, Quick Parts and Building Blocks

Eliminate repetitive drafting tasks by creating reusable content components. Learn how to build and manage tools that improve consistency, accuracy, and document creation speed.

● Microsoft Word

Better Page Breaks

Prevent awkward formatting and improve document appearance with smarter page break techniques. Learn how to maintain cleaner layouts and more professional documents.

● Microsoft Word

Change Default Formatting For New Documents

Stop correcting the same formatting issues repeatedly. Learn how to configure default settings that create greater consistency and reduce manual formatting work.

• Microsoft Word

Creating Bulletproof Word Documents

Build documents that remain stable, consistent, and easier to manage as they grow in complexity. Learn techniques that reduce formatting problems and improve long-term document reliability.

• Microsoft Word

Cut Copy and Paste – Advanced Techniques

Gain greater control over how content moves between documents. Learn advanced techniques that preserve formatting, improve efficiency, and reduce cleanup time when reusing text and content.

• Microsoft Word

Customize the Status Bar

Tailor Word's interface to surface the information you use most. Learn how to customize the Status Bar to improve visibility, navigation, and day-to-day productivity.

• Microsoft Word

Designing Estate Planning and Transactional Documents in Microsoft...

Create sophisticated transactional and estate planning documents with greater efficiency and consistency. Learn formatting techniques that support complex legal drafting requirements.

• Microsoft Word

Formatting Complex Pleadings in Microsoft Word

Master the formatting challenges unique to pleadings and litigation documents. Learn techniques that improve accuracy, consistency, and professional presentation.

• Microsoft Word

Holding Paragraphs Together – Keep with Next & Keep Lines Together

Prevent unwanted page breaks and improve document readability. Learn how Word's paragraph controls help maintain cleaner, more professional layouts.

• Microsoft Word

How To Make Drafting Complex Documents Much Faster and Easier

Reduce the time and effort required to produce sophisticated legal documents. Learn practical drafting techniques that improve efficiency while maintaining quality and consistency.

• Microsoft Word

How to Design Captions for Pleadings

Create pleading captions that meet court requirements while remaining easy to update and maintain. Learn formatting techniques that reduce frustration and improve consistency.

• Microsoft Word

How to Prevent Formatting From Shifting While You Edit

Avoid one of Word's most common frustrations. Learn techniques for maintaining stable formatting throughout the editing process and reducing unexpected document changes.

• Microsoft Word

Indents – Advanced Techniques

Gain greater control over document structure and appearance. Learn advanced indentation techniques that improve readability and support complex legal formatting requirements.

• Microsoft Word

Non-Breaking Spaces and Hyphens – How To Use Them

Prevent unwanted line breaks and improve document presentation. Learn how non-breaking spaces and hyphens help maintain cleaner formatting in legal documents.

• Microsoft Word

Page Numbering – Advanced Techniques

Handle complex page numbering scenarios with confidence. Learn how to manage sections, exhibits, appendices, and other advanced numbering requirements.

• Microsoft Word

Programmatical Default Settings – How To Improve Them

Improve Word's default behavior to better support legal workflows. Learn how to configure settings that reduce frustration, improve consistency, and create a more efficient user experience.

• Microsoft Word

Quick Access Toolbar

Put your most frequently used commands within easy reach. Learn how to customize the Quick Access Toolbar to reduce clicks and improve productivity.

• Microsoft Word

Ruler

Gain greater precision when formatting legal documents. Learn how to use Word's ruler to control margins, tabs, indents, and document alignment more effectively.

• Microsoft Word

Set Up the Styles Pane

Work more efficiently with Word's most important formatting tools. Learn how to configure and use the Styles Pane to improve consistency and simplify document management.

• Microsoft Word

Shortcut Keys – How to Create and Modify Them

Speed up common tasks by creating customized keyboard shortcuts. Learn how to modify and manage shortcut keys that support your most frequently used workflows.

• Microsoft Word

Signature Lines – Best Way To Set Them Up

Create professional signature blocks that are easy to maintain and use. Learn formatting techniques that support cleaner documents and more efficient execution workflows.

• Microsoft Word

Spacing Between Paragraphs – How To Make It Automatic

Improve document consistency while reducing manual formatting work. Learn how to automate paragraph spacing and create cleaner, more professional documents.

• Microsoft Word

Styles – How To Import Styles from One Document To Another

Reuse proven formatting standards across documents without starting from scratch. Learn how to transfer styles efficiently and maintain consistency across your firm's work product.

• Microsoft Word

Styles – What They Are and How They Work

Build a stronger foundation in one of Word's most important features. Learn how styles improve consistency, simplify formatting, and make complex documents easier to manage.

• Microsoft Word

Advanced Tabs

Create more precise document layouts using advanced tab settings and techniques. Learn how tabs can improve alignment, readability, and document consistency across legal work product.

• Microsoft Word

Microsoft Outlook

Microsoft Outlook Overview

Build a solid foundation in Outlook's core features and capabilities. Learn how to manage email, calendars, contacts, and tasks more effectively while creating a more organized approach to daily work.

• [Microsoft Outlook](#)

Attachments

Work more effectively with email attachments while reducing confusion and version-control issues. Learn best practices for attaching, sharing, saving, and managing files within Outlook.

• [Microsoft Outlook](#)

Automatic Replies (Out of Office)

Create professional automatic replies that keep clients, colleagues, and contacts informed while you're away. Learn how to configure settings, manage expectations, and ensure important communications continue to receive appropriate attention.

• [Microsoft Outlook](#)

Autotext & Quick Parts

Save time and improve consistency by reusing frequently written content. Learn how to create, manage, and deploy Quick Parts and AutoText entries that reduce repetitive typing and streamline common communication tasks.

• [Microsoft Outlook](#)

BCC Usage

Understand when and how to use blind carbon copy effectively in professional communications. Learn best practices that help protect privacy, improve communication management, and avoid common email mistakes.

• [Microsoft Outlook](#)

Categories

Organize email, calendar items, contacts, and tasks more effectively using categories. Learn practical techniques for improving visibility, prioritization, and workflow management.

• [Microsoft Outlook](#)

Contacts

Build and maintain a more useful contact database within Outlook. Learn how to create, organize, and manage contact records that support stronger communication and relationship management.

• [Microsoft Outlook](#)

Conversations & Email Threads

Keep email discussions organized and easier to follow. Learn how conversation view works, when to use it, and how to manage lengthy email chains more efficiently in a busy legal environment.

• [Microsoft Outlook](#)

Editing the Autocomplete List

Improve email accuracy and reduce addressing mistakes by managing Outlook's autocomplete suggestions. Learn how to update, remove, and maintain saved email addresses more effectively.

• [Microsoft Outlook](#)

Email Filtering in Outlook

Reduce inbox clutter and focus on the messages that matter most. Learn how to use Outlook's filtering tools to organize email, improve visibility, and make information easier to find when you need it.

• [Microsoft Outlook](#)

Email Signatures

Create consistent, professional email signatures that reinforce your firm's brand and communication standards. Learn how to build, manage, and maintain signatures across Outlook environments.

• [Microsoft Outlook](#)

Folders & Organization

Develop a more organized approach to email management. Learn strategies for creating folder structures, managing information efficiently, and reducing the time spent searching for messages.

• [Microsoft Outlook](#)

How To Protect Yourself and Preserve Confidentiality When Negotiating...

Reduce the risk of exposing confidential information during document negotiations. Learn practical safeguards, common pitfalls, and best practices for protecting sensitive content when exchanging documents electronically.

• [Microsoft Outlook](#)

Junk Email

Take greater control of unwanted email and reduce distractions. Learn how Outlook's junk mail tools help filter spam, improve inbox management, and reduce security risks.

• [Microsoft Outlook](#)

Managing Email with Quick Steps, Rules, and Add-ins

Automate repetitive inbox tasks and simplify email management. Learn how to use Quick Steps, Rules, and Outlook add-ins to reduce manual effort and create more efficient communication workflows.

• [Microsoft Outlook](#)

Outlook and Word Tips & Tricks

Discover practical shortcuts, lesser-known features, and time-saving techniques that help you work more efficiently in two of the most widely used Microsoft applications.

• [Microsoft Word & Outlook](#)

Quick Access Toolbar

Customize Outlook's interface to put frequently used commands within easy reach. Learn how to reduce clicks, streamline navigation, and improve productivity.

• [Microsoft Outlook](#)

Quick Steps (2013, 2016)

Automate common email actions with Quick Steps. Learn how to create shortcuts that simplify repetitive tasks and improve inbox efficiency.

• [Microsoft Outlook](#)

Reading Pane

Configure and use the Reading Pane more effectively to review messages faster and improve email workflow. Learn settings and techniques that support better productivity.

• [Microsoft Outlook](#)

Search

Find messages, contacts, and information more quickly using Outlook's search tools. Learn practical search techniques that improve accuracy and reduce time spent hunting for information.

• [Microsoft Outlook](#)

Send to OneNote

Capture important email content for future reference and organization. Learn how Outlook and OneNote work together to support note-taking, research, and information management.

• [Microsoft Outlook](#)

Share to Teams

Improve collaboration by sharing Outlook content directly into Microsoft Teams. Learn how to move conversations, information, and files into collaborative workspaces more efficiently.

• [Microsoft Outlook](#)

Should I Click This? (Security Awareness)

Recognize common email threats before they become security incidents. Learn how to identify suspicious messages, avoid phishing attacks, and make safer decisions when handling email.

• [Microsoft Outlook](#)

Tasks and To-Dos

Turn Outlook into a more effective task management system. Learn how to create, organize, and manage tasks that help you stay on top of priorities and deadlines.

• [Microsoft Outlook](#)

To-Do Bar

Keep important tasks, appointments, and reminders visible throughout the workday. Learn how the To-Do Bar supports organization, planning, and productivity.

• [Microsoft Outlook](#)

Translate in Outlook

Communicate more effectively across languages using Outlook's translation tools. Learn how to translate messages quickly and improve communication with clients and colleagues.

• [Microsoft Outlook](#)

Unsending Emails

Reduce the impact of email mistakes by understanding Outlook's message recall and recovery options. Learn what can be undone, when it works, and how to minimize communication errors.

• [Microsoft Outlook](#)

Views in Outlook

Customize how information is displayed throughout Outlook to better match your workflow. Learn how views improve organization, visibility, and access to important information.

• [Microsoft Outlook](#)

Writing Suggestions for Outlook

Improve the clarity, professionalism, and effectiveness of email communications. Learn how Outlook's writing assistance tools can help refine messages and strengthen communication quality.

• [Microsoft Outlook](#)

Microsoft Excel

Excel for Legal Professionals

Turn spreadsheet data into useful information that supports better decisions and stronger firm operations. Learn practical Excel skills for organizing data, analyzing information, creating reports, and improving accuracy in financial, administrative, and case-related workflows.

• [Microsoft Excel](#)

Microsoft PowerPoint

PowerPoint for Legal Professionals

Create clearer, more persuasive presentations for clients, colleagues, juries, and professional audiences. Learn practical techniques for organizing content, improving design, and delivering information with greater impact.

• [Microsoft PowerPoint](#)

Animations

Use animations strategically to guide attention and communicate information more effectively. Learn how to enhance presentations without creating unnecessary distractions for your audience.

• [Microsoft PowerPoint](#)

Bullet Points

Improve slide readability and audience engagement through more effective use of bullet points. Learn techniques for organizing information clearly and presenting ideas in a way that's easier to understand and retain.

• [Microsoft PowerPoint](#)

Creating Flow Charts

Transform complex processes into clear visual workflows. Learn techniques for building flow charts that make procedures, timelines, and decision paths easier to understand.

• [Microsoft PowerPoint](#)

Creating a Timeline

Present dates, milestones, and case events in a format that's easy to follow. Learn how to build professional timelines that communicate information clearly and effectively.

• [Microsoft PowerPoint](#)

Custom Backgrounds

Create presentations with a more polished and professional appearance using custom backgrounds. Learn how to incorporate branding, improve visual consistency, and enhance slide design.

• [Microsoft PowerPoint](#)

Design Part 1

Build stronger presentations through thoughtful design choices. Learn foundational principles that improve readability, visual appeal, and audience engagement.

• [Microsoft PowerPoint](#)

Design Part 2

Take presentation design skills further with advanced techniques for layout, consistency, and visual communication. Create slides that look polished and communicate more effectively.

• [Microsoft PowerPoint](#)

Highlighting In and Out of PowerPoint

Direct attention to key information using highlighting techniques that improve clarity and audience understanding. Learn practical methods for emphasizing important content.

• Microsoft PowerPoint

Inserting Documents, Photos, Images & Evidence

Incorporate supporting materials into presentations while maintaining organization and visual quality. Learn techniques for working with documents, photographs, and evidence effectively.

• Microsoft PowerPoint

Inserting Photo Albums or Photo Sets

Present large groups of images in a structured, professional format. Learn how to create photo collections that support storytelling, education, and case presentation needs.

• Microsoft PowerPoint

Photograph and Document Callouts

Draw attention to critical details within images and documents. Learn techniques for creating effective callouts that help audiences focus on the information that matters most.

• Microsoft PowerPoint

Presentation Tips & Shortcuts

Work faster and present more confidently with practical PowerPoint shortcuts and productivity techniques. Learn ways to streamline slide creation and improve presentation quality.

• Microsoft PowerPoint

Presentation View

Take advantage of presentation tools that help you deliver content more effectively. Learn how Presentation View supports speaker notes, navigation, timing, and audience engagement.

• Microsoft PowerPoint

Presenting from iPad or Tablet

Deliver presentations confidently from mobile devices. Learn how to prepare, navigate, and present effectively while taking advantage of the flexibility tablets provide.

• Microsoft PowerPoint

Slide Transitions

Create smoother visual flow between slides using transitions effectively and professionally. Learn when transitions add value and how to use them without distracting from your message.

• Microsoft PowerPoint

Text Boxes

Organize and position content more effectively using text boxes. Learn techniques for improving layout, readability, and visual hierarchy throughout your presentations.

• Microsoft PowerPoint

Themes and Templates

Create consistent, professional presentations using themes and templates. Learn how to standardize design, reinforce branding, and reduce time spent formatting slides.

• Microsoft PowerPoint

Working with Video and Audio Files

Enhance presentations with multimedia content that supports understanding and engagement. Learn how to incorporate video and audio effectively while avoiding common technical issues.

• Microsoft PowerPoint

Microsoft 365 Applications

Microsoft Office: Ask. Learn. Grow.

Bring your questions, solve real-world challenges, and discover practical ways to work more efficiently across Microsoft 365. These interactive sessions help users build confidence, troubleshoot issues, and uncover techniques that improve daily workflows.

• Microsoft 365

SECTION 04

Document Management & Collaboration

Finding information quickly, organizing documents consistently, and collaborating effectively are essential to modern legal work. These courses help legal professionals improve document workflows, strengthen information management practices, and support better team collaboration through NetDocuments and related document management tools.

FEATURED

Document Management

FEATURED COURSE

Why Document Automation Technology Has Become Mandatory; and How To Pick The Best Platform For Your Practice

Explore how document automation has transformed legal work and why it has become an increasingly important technology for modern law firms. Learn key considerations for evaluating platforms and selecting solutions that align with your firm's needs.

NetDocuments

NetDocuments: Ask. Learn. Grow.

Bring your questions, solve real-world challenges, and learn practical techniques from experienced NetDocuments professionals. These sessions help users improve workflows, troubleshoot issues, and get more value from the platform.

[• NetDocuments](#)

Create a Saved Search

Save frequently used NetDocuments searches and surface important information faster. Learn how saved searches can reduce repetitive work, improve consistency, and provide quicker access to matter-related content across your repository.

[• NetDocuments](#)

Customizing Advanced Search Fields

Tailor NetDocuments search fields to better align with your firm's workflows. Learn how customization can improve search accuracy, streamline information retrieval, and help users locate documents more efficiently.

[• NetDocuments](#)

Customizing Your Homepage

Create a more personalized NetDocuments experience by configuring your homepage around the information and tools you use most. Improve visibility, navigation, and day-to-day efficiency.

[• NetDocuments](#)

Email a Link or Copy

Share documents more effectively by understanding when to send links versus copies from NetDocuments. Improve collaboration while maintaining better control over document access and version management.

• [NetDocuments](#)

How to Turn on Search Snippets

See relevant content before opening a document. Learn how NetDocuments search snippets can improve search accuracy and help you locate information faster.

• [NetDocuments](#)

Introduction to More Menu

Explore additional NetDocuments tools and functions available through the More menu. Learn where key features are located and how they can support more efficient document management workflows.

• [NetDocuments](#)

Outlook Navigation Panel

Use the NetDocuments Outlook Navigation Panel to access workspaces, documents, and related content without leaving Outlook. Improve efficiency and streamline document management tasks directly from your inbox.

• [NetDocuments](#)

Power Bar Overview & Customization

Navigate NetDocuments more efficiently by tailoring the Power Bar to your most common workflows. Learn how customization can reduce clicks, improve access to frequently used commands, and create a more personalized user experience.

• [NetDocuments](#)

Right-Click Menu Overview & Customization

Customize NetDocuments shortcut menus to better support the way your team works. Gain faster access to commonly used actions and reduce unnecessary navigation.

• [NetDocuments](#)

Saving Emails in Outlook Using Folder Mapping

Automate email filing by connecting Outlook folders to NetDocuments workspaces. Learn how folder mapping can improve consistency and reduce manual filing effort.

• [NetDocuments](#)

Saving Emails in Outlook Using ndSave

Capture and profile important email communications directly from Outlook using ndSave. Improve filing consistency and make matter-related correspondence easier to locate and manage.

• [NetDocuments](#)

Saving Emails with ndMail

Improve email management by using ndMail for NetDocuments to automatically capture, profile, and store important communications alongside related matter documents.

• NetDocuments

Search Strategies

Develop more effective NetDocuments search habits that help you locate information faster. Learn practical techniques for improving both search speed and search accuracy.

• NetDocuments

Searching for Client Matters

Quickly locate documents and information associated with specific clients and matters. Learn search techniques that improve efficiency and reduce time spent hunting for information.

• NetDocuments

Searching with Boolean Logic and Wildcards

Take advantage of advanced NetDocuments search capabilities using Boolean operators and wildcard searches. Refine results and uncover information that standard searches may miss.

• NetDocuments

Send a Secure Link

Share documents securely through NetDocuments without relying on email attachments. Improve document control while supporting safer and more efficient collaboration.

• NetDocuments

Using Advanced Search

Go beyond basic searches to locate information with greater precision. Learn how NetDocuments advanced search tools can help you find documents faster, narrow results more effectively, and improve overall information retrieval.

• NetDocuments

Using Simple Search to Search a Workspace

Retrieve information quickly within a specific NetDocuments workspace using simple search tools. Learn practical techniques for finding matter-related content without complex search criteria.

• NetDocuments

View Document URL

Locate and share direct NetDocuments document links to improve collaboration and provide faster access to important information.

• NetDocuments

Document Management Best Practices

Secure Documents and Digital Signatures

Protect sensitive information while simplifying document exchange and approval processes. Learn practical approaches to document security, digital signatures, and secure collaboration in a legal environment.

SECTION 05

PDF & Document Production

Create, edit, secure, and manage legal documents with greater confidence. These courses focus on the tools and techniques law firms use to produce professional work product, streamline document workflows, improve collaboration, and protect sensitive information. Explore practical skills for working with PDFs, electronic signatures, document security, and speech recognition technology.

FEATURED

Adobe Acrobat

FEATURED COURSE

Adobe Acrobat DC for Legal Professionals

• Adobe Acrobat

Get more value from Adobe Acrobat by learning the tools legal professionals use most. Explore practical techniques for creating, editing, organizing, securing, and sharing PDFs while improving document quality, collaboration, and efficiency across everyday legal workflows.

Adobe Acrobat

Fill & Sign Tool in Adobe Acrobat DC

Simplify document completion and signature collection with Adobe Acrobat's Fill & Sign tools. Learn how to prepare forms, capture signatures, and streamline document execution without printing, scanning, or manual processing.

• Adobe Acrobat

Foxit PDF Editor

Foxit for Legal Professionals: Essential PDF Skills for Lawyers and Legal Teams

Build practical PDF skills that improve document production, review, and collaboration. Learn how to create, edit, organize, annotate, secure, and share PDFs more effectively while supporting the demands of modern legal practice.

• Foxit PDF Editor

Speech Recognition & Document Production

How to Use Dragon Legal

Discover how modern speech recognition technology can accelerate drafting, email management, and administrative work. Learn how Dragon Legal can help reduce typing, improve productivity, and support more efficient document creation throughout the workday.

- [Dragon Legal](#)

SECTION 06

Practice Management, Billing & Accounting Systems

Develop the operational skills needed to manage matters, billing, accounting, trust transactions, reporting, and firm workflows more effectively. These courses help legal professionals get more value from the systems that power day-to-day law firm operations while improving accuracy, efficiency, and visibility across the firm.

FEATURED

Practice Management

FEATURED COURSE

Centerbase: Ask. Learn. Grow.

Bring your questions, solve real-world challenges, and learn practical techniques from experienced Centerbase professionals. These interactive sessions help users improve workflows, troubleshoot issues, and discover more efficient ways to manage matters, billing, accounting, and firm operations within Centerbase.

Centerbase

Creating a Vendor Bill from the Vendor Center

Learn how to create vendor bills directly from the Vendor Center while maintaining accurate financial records. Explore workflows that streamline expense tracking, improve accounting efficiency, and help ensure vendor obligations are recorded consistently.

• Centerbase

Rate Table Management

Build and maintain rate tables that support accurate billing across clients, matters, and timekeepers. Learn how to manage rate groups, exceptions, future increases, and default settings while improving consistency throughout the billing process.

• Centerbase

Matter Trust Deposit

Record trust deposits accurately and maintain a complete audit trail for client funds. Learn how to allocate deposits correctly, improve trust accounting accuracy, and ensure compliance with firm and regulatory requirements.

• Centerbase

Trust Bank Transfers

Move funds between trust accounts while maintaining proper documentation and compliance. Learn how to process transfers accurately, preserve transaction history, and support stronger trust accounting controls.

• Centerbase

Trust Ledger

Monitor trust account activity with greater confidence and visibility. Learn how to review balances, deposits, transfers, and disbursements while maintaining accurate records for client trust management.

• Centerbase

Trust Reports

Generate trust reports that provide clear visibility into account activity and balances. Learn how to review key trust information, support reconciliation efforts, and maintain compliance with trust accounting requirements.

• Centerbase

Trust Retainer Replenishment

Automate and manage trust retainer replenishment processes more efficiently. Learn how to establish replenishment rules, monitor balances, and help ensure client retainers remain adequately funded.

• Centerbase

Trust Transfer (Matter to Matter)

Transfer trust funds between matters while maintaining proper documentation and audit records. Learn best practices for handling transfers accurately and supporting trust accounting compliance.

• Centerbase

Undeposited Funds and Bank Deposits

Manage receipts from initial payment through final bank deposit. Learn how to work with undeposited funds, create deposit batches, and maintain accurate financial records throughout the deposit process.

• Centerbase

Writing an Operating Check

Create and issue operating account checks with greater accuracy and confidence. Learn how to select payees, record transactions properly, and ensure expenses are posted to the correct accounts.

• Centerbase

Adding Trust Accounts

Set up trust accounts correctly from the start. Learn how to configure account settings, establish banking relationships, and create a foundation for accurate trust accounting and compliance.

• Centerbase

Client Receipts

Record and apply client payments efficiently while maintaining accurate accounting records. Learn how to manage receipts, process trust applications, handle overpayments, and improve payment tracking.

• Centerbase

Adding a New Matter from a Potential New Client

Streamline the transition from intake to active representation. Learn how to create matters directly from prospective client records while preserving key information and improving workflow efficiency.

• Centerbase

Adding a Billing Entry – Timesheet – Timer

Capture billable work more consistently using Centerbase timekeeping tools. Learn how to record time through timesheets and timers while improving billing accuracy and reducing missed entries.

• Centerbase

Basic Navigation

Build a strong foundation for working efficiently in Centerbase. Learn how to navigate menus, access key tools, and locate important information so you can work with greater confidence throughout the platform.

• Centerbase

Adding a Contact (New Menu)

Create and maintain contact records using Centerbase's updated interface. Learn how to capture information accurately, improve data consistency, and support stronger relationship management.

• Centerbase

Creating and Saving an Advanced Search

Find information faster using advanced search tools and saved search criteria. Learn how to build powerful searches, improve accuracy, and reduce time spent locating records and data.

• Centerbase

Dashboard Chart and Tiles

Turn dashboard information into actionable insights. Learn how to configure charts and tiles, monitor key metrics, and customize dashboards to support better decision-making.

• Centerbase

Retainers (Operating Accounts)

Manage retainers held in operating accounts accurately and efficiently. Learn how to track balances, apply funds appropriately, and maintain clear financial records.

• Centerbase

Vendor Bill Payments

Process vendor payments while maintaining accurate accounting records. Learn how to manage payment workflows, improve tracking, and streamline accounts payable operations.

• Centerbase

Vendor Center

Centralize vendor management activities within Centerbase. Learn how to maintain vendor records, access key information quickly, and improve consistency across accounting workflows.

• Centerbase

3 Ways to Add a Task or Appointment

Discover multiple approaches for creating tasks and appointments based on your workflow needs. Learn techniques that improve scheduling efficiency and help ensure important work stays on track.

• Centerbase

Updating an Appointment From Outlook

Keep calendars synchronized between Outlook and Centerbase. Learn how to update appointments efficiently, reduce duplicate effort, and improve scheduling accuracy.

• Centerbase

Admin Navigation Bar Training – Main Menu

Gain a better understanding of Centerbase administrative tools and settings. Learn how to navigate the main menu efficiently and access key areas used for system management and configuration.

• Centerbase

Billing Rates

Establish billing rates that support accurate invoicing and reporting. Learn how to configure rates for users, clients, and matters while maintaining consistency across billing workflows.

• Centerbase

Billable Events

Create and manage events that generate billable time. Learn how to connect scheduling and billing activities while improving time capture and reducing missed revenue opportunities.

• Centerbase

Billing Flat Fees

Manage flat-fee billing arrangements with greater accuracy and visibility. Learn how flat fees are configured, tracked, and incorporated into firm billing workflows.

• Centerbase

Credits and Credit Distributions

Apply credits correctly and manage account adjustments with confidence. Learn how to distribute credits, reduce outstanding balances, and maintain accurate client accounting records.

• Centerbase

Email Bill Settings and Emailing Client Bills

Improve the efficiency and consistency of electronic billing communications. Learn how to configure billing email settings, customize delivery options, and send client invoices directly from Centerbase.

• Centerbase

Trust Deposit Slip

Create trust deposit slips quickly and accurately from undeposited funds. Learn how to prepare deposits, generate supporting documentation, and maintain clear trust accounting records.

• Centerbase

PracticeMaster

Tabs3 & PracticeMaster: Ask. Learn. Grow.

Bring your questions, solve real-world challenges, and learn practical techniques from experienced Tabs3 and PracticeMaster professionals. These interactive sessions help users improve workflows, troubleshoot issues, and discover more efficient ways to manage matters, calendars, contacts, billing, and daily operations.

Calendar Rules

Customize calendar behavior to better support your firm's scheduling needs. Learn how to manage display settings, sharing preferences, and default calendar options that improve visibility and consistency across your team.

• PracticeMaster

How to Configure the Outlook Calendar Sync

Keep appointments synchronized between Outlook and PracticeMaster. Learn how to configure calendar synchronization settings, improve scheduling accuracy, and reduce duplicate data entry.

• PracticeMaster

How to Use the Quick Date Calculator

Calculate dates quickly and accurately when working with deadlines, scheduling, and matter-related activities. Learn how to use built-in tools that simplify date calculations and reduce manual effort.

• PracticeMaster

Navigating Calendar Views

Work more efficiently with calendar information by understanding the available viewing options. Learn how to customize calendar displays and quickly access the scheduling information most relevant to your role.

• PracticeMaster

Searching Journal Records

Locate notes, phone calls, and activity records more efficiently. Learn search techniques that help you retrieve important matter information faster and improve access to historical records.

• PracticeMaster

Calendar Properties

Configure calendar settings that support your firm's scheduling and workflow requirements. Learn how calendar properties influence visibility, functionality, and user experience throughout the platform.

• PracticeMaster

Convert to Fee Function

Reduce duplicate data entry by converting activity records into billable fee entries. Learn how to streamline time capture, improve billing accuracy, and create a more efficient workflow.

• PracticeMaster

Creating Events with Recurring Dates

Manage recurring appointments and deadlines more effectively. Learn how to create recurring events, handle exceptions, and maintain accurate scheduling across matters and calendars.

• PracticeMaster

Fee Entry – Convert to Fee Setup

Configure the settings that support efficient fee generation from activity records. Learn how to establish defaults and preferences that improve billing consistency and reduce administrative work.

• PracticeMaster

Filters

Find information faster by creating and applying custom filters. Learn how to narrow results, focus on relevant records, and improve efficiency when working with large volumes of data.

• PracticeMaster

Navigating Client File and Matter Manager

Access client and matter information more efficiently through Client File and Matter Manager. Learn how to navigate records, locate key information, and manage matter-related activities with greater confidence.

• PracticeMaster

Configuring the Outlook Plug-in in PracticeMaster

Connect Outlook and PracticeMaster to improve communication and record management. Learn how to configure the Outlook plug-in and streamline the process of saving emails and related information.

• PracticeMaster

Adding Phone Note from Contact Phone

Capture phone conversations directly from contact records while maintaining matter context. Learn how to create linked notes that improve documentation and support stronger recordkeeping.

• PracticeMaster

QuickViews

Switch between saved layouts and filtered views with greater efficiency. Learn how QuickViews can help users access information faster and tailor the interface to specific workflows.

• PracticeMaster

Adding Events and Tasks

Create appointments and tasks that keep work organized and moving forward. Learn how to assign ownership, set reminders, and connect activities to the appropriate matters.

• PracticeMaster

Auto Email Notification

Stay informed about important activity and record changes through automated notifications. Learn how to configure alerts that improve communication and reduce missed updates.

• PracticeMaster

Calendar Codes

Standardize calendar entries and improve reporting consistency through effective use of calendar codes. Learn how to create, manage, and apply codes that support firm-wide scheduling practices.

• PracticeMaster

Column Layouts

Customize record displays to focus on the information most important to your work. Learn how to create, save, and manage column layouts that improve productivity and usability.

• PracticeMaster

Convert to Fee from Journal Record

Convert journal entries into billable fee records without re-entering information. Learn how to streamline billing workflows, improve time capture, and reduce administrative effort.

• PracticeMaster

Dashboard

Monitor key activities, deadlines, and work items from a centralized dashboard. Learn how to configure dashboard elements and improve visibility into important firm operations.

• PracticeMaster

Adding Journal Records

Document calls, notes, and matter activity in a consistent and organized manner. Learn how journal records support communication, recordkeeping, and matter management workflows.

• PracticeMaster

Timers

Track work as it happens using built-in timing tools. Learn how to capture billable activity more accurately and improve the completeness of time records.

• PracticeMaster

Conflict of Interest Search

Identify potential conflicts before they become problems. Learn how to perform conflict searches efficiently and support stronger risk management practices across the firm.

• PracticeMaster

Document Management in PracticeMaster

Organize matter-related documents in a way that supports accessibility and consistency. Learn how document management tools can improve information retrieval and workflow efficiency.

• PracticeMaster

Sending eNotes

Communicate internally using PracticeMaster's eNote system. Learn how to send secure messages, share information efficiently, and improve collaboration across the firm.

• PracticeMaster

eNote List

Manage incoming and outgoing eNotes more effectively. Learn how to organize messages, monitor communication, and keep important information accessible.

• PracticeMaster

Routing Documents for Review via eNotes

Improve document review workflows by routing files through the eNote system. Learn how to streamline internal review processes, support collaboration, and maintain visibility into document status.

• PracticeMaster

Tabs3

Trust Reports

Generate trust accounting reports that provide visibility into account activity, balances, and transactions. Learn how to review trust information more effectively and support compliance with trust accounting requirements.

• [Tabs3](#)

Finalizing—Un-finalizing Bills

Manage the billing lifecycle with greater control and accuracy. Learn how to finalize invoices, reverse finalized bills when necessary, and maintain accurate billing records throughout the process.

• [Tabs3](#)

Options for Overpayments

Handle client overpayments accurately and consistently. Learn how to manage excess funds, apply credits appropriately, and maintain clear accounting records while supporting firm policies and procedures.

• [Tabs3](#)

Editing Fee Entries

Modify fee entries efficiently while maintaining billing accuracy. Learn how to update rates, time entries, and narratives to ensure invoices reflect the correct work and value provided.

• [Tabs3](#)

Text Macro

Reduce repetitive typing and improve consistency with reusable text macros. Learn how to create, manage, and apply standardized language for billing narratives and other frequently used entries.

• [Tabs3](#)

Combine Trust Transactions

Consolidate trust transactions while maintaining accurate financial records. Learn how to simplify trust account management and improve transaction organization.

• [Tabs3](#)

Setting Up a Trust Account for a Matter

Establish trust accounts correctly at the matter level. Learn how to configure account settings, connect banking information, and support accurate trust accounting from the outset.

• [Tabs3](#)

Trust – Printing Checks

Print trust account checks with confidence while maintaining compliance and proper documentation. Learn how to select transactions, verify details, and manage the trust check process efficiently.

• [Tabs3](#)

Voiding a Trust Check

Reverse trust checks accurately while preserving a complete audit trail. Learn how to void transactions properly and maintain compliance with trust accounting requirements.

• [Tabs3](#)

Prebill Tracking

Monitor billing activity from prebill creation through final invoicing. Learn how to track edits, reviews, and approvals while improving billing visibility and workflow management.

• [Tabs3](#)

Statement Comments

Enhance client communication through customized statement comments. Learn how to create, manage, and apply comments that provide additional context and improve invoice clarity.

• [Tabs3](#)

Tabs3 Connect

Access Tabs3 remotely through a browser-based experience. Learn how to review information, enter time, and stay productive while working away from the office.

• [Tabs3](#)

Recap of Hours

Track billed and unbilled time more effectively using Recap of Hours reporting. Learn how to monitor productivity, identify trends, and support stronger time management practices.

• [Tabs3](#)

Adding Trust Transactions

Record trust deposits, disbursements, and transfers accurately. Learn how to manage trust activity while maintaining complete documentation and compliance.

• [Tabs3](#)

Statement Customization

Create billing statements that align with your firm's branding and communication needs. Learn how to customize layouts, formats, and presentation options for client invoices.

• [Tabs3](#)

My Actions Customization

Personalize your Tabs3 workspace for greater efficiency. Learn how to customize shortcuts, frequently used actions, and interface elements to better support daily workflows.

• [Tabs3](#)

Matter Manager

Access and manage matter information from a centralized location. Learn how Matter Manager improves visibility into client and matter activity while supporting day-to-day operations.

• [Tabs3](#)

Trust Accounting Positive Pay Export

Strengthen fraud prevention efforts by exporting trust checks in Positive Pay format. Learn how to create export files that support banking security processes and reduce risk.

• [Tabs3](#)

Accounts Payable Customization

Configure accounts payable settings to better align with firm workflows. Learn how customization options can improve efficiency, accuracy, and usability across AP processes.

• [Tabs3](#)

Accounts Payable Check Printing

Generate vendor checks efficiently while maintaining accurate accounting records. Learn how to manage check printing workflows and support timely payment processing.

• [Tabs3](#)

Accounts Payable Void Posted Check

Correct accounting records by properly voiding previously posted vendor checks. Learn how to reverse transactions while maintaining financial accuracy and audit integrity.

• [Tabs3](#)

Accounts Payable Positive Pay Export

Create Positive Pay exports for accounts payable checks to support fraud prevention and banking controls. Learn how to generate files that integrate with financial institution requirements.

• [Tabs3](#)

Split Billing

Allocate charges across multiple clients or matters with greater flexibility. Learn how split billing supports alternative billing arrangements while maintaining accurate financial records.

• [Tabs3](#)

Flat Fee Adjustment

Adjust flat-fee billing entries accurately and efficiently. Learn how to manage changes while preserving billing integrity and supporting alternative fee arrangements.

• [Tabs3](#)

Statement Manager

Manage the creation, review, and distribution of billing statements from a centralized location. Learn how Statement Manager supports more efficient billing workflows and invoice management.

• [Tabs3](#)

Applying Payments to a Specific Statement Number

Apply payments directly to specific invoices for greater accuracy and control. Learn how to manage client payments, reduce reconciliation challenges, and maintain clear billing records.

• [Tabs3](#)

Client Funds

Track and manage client funds throughout the billing and accounting lifecycle. Learn how to record transactions accurately and maintain visibility into client balances and activity.

• [Tabs3](#)

Rates Overview

Build a stronger understanding of how billing rates are configured and applied. Learn how to manage rates effectively across clients, matters, and timekeepers to support accurate billing.

• [Tabs3](#)

SECTION 07

Litigation & Trial Technology

Leverage technology to better organize information, manage discovery, prepare case materials, and present evidence effectively. These courses explore practical tools and workflows that help litigators work more efficiently, stay organized, and deliver stronger presentations throughout the lifecycle of a case.

FEATURED

Litigation & Trial Tech

FEATURED COURSE

60 Litigation Tips, Tricks, Apps, Websites in 60 Minutes

Discover a collection of technology tools, applications, websites, and productivity resources designed specifically for litigators. Explore practical solutions that can improve organization, streamline workflows, support case preparation, and help legal professionals work more efficiently.

More Courses

Document & Discovery Management for Litigators

Manage growing volumes of case information with greater confidence and control. Learn practical approaches to organizing documents, handling discovery, improving information retrieval, and creating more efficient litigation workflows.

SECTION 08

Reference Guides & Manuals

Keep trusted resources close at hand with comprehensive reference materials designed specifically for legal professionals. These manuals provide step-by-step guidance, practical examples, and proven workflows for the software tools law firms rely on every day.

FEATURED MANUAL

Microsoft Word

FEATURED MANUAL

Microsoft Word for Legal Professionals

- Microsoft Word

Master the tools and techniques legal professionals rely on most in Microsoft Word. This guide provides practical instruction for creating, formatting, managing, and troubleshooting legal documents more efficiently and consistently.

More Manuals

Adobe Acrobat for Legal Professionals Manual

Master Adobe Acrobat with practical, legal-specific guidance covering the tools and workflows most commonly used in law firms. This reference manual provides step-by-step instruction for creating, editing, securing, organizing, and sharing PDF documents more effectively.

- Adobe Acrobat

Foxit PDF Editor for Legal Professionals Manual

Learn how to use Foxit PDF Editor more effectively in a legal environment. This manual provides detailed instruction, practical examples, and proven workflows for creating, editing, reviewing, securing, and managing PDF documents.

- Foxit PDF Editor

Kofax (Nuance) Power PDF Advanced for Legal Professionals Manual

Develop a deeper understanding of Power PDF through legal-specific instruction and practical workflows. This manual helps users improve document production, editing, security, and collaboration while working more efficiently with PDFs.

- Tungsten Power PDF

Microsoft Excel for Windows Manual

Build stronger spreadsheet skills with guidance designed specifically for legal professionals. Learn how to organize data, create reports, analyze information, and use Excel more effectively in everyday law firm operations.

- Microsoft Excel

Microsoft Outlook for Legal Professionals

Improve email management, scheduling, task tracking, and communication workflows with practical Outlook instruction tailored to the needs of legal professionals.

- [Microsoft Outlook](#)

Microsoft Word for Mac for Legal Professionals Manual

Designed specifically for legal professionals using Word on macOS, this manual provides practical instruction for creating, formatting, editing, and managing legal documents more effectively in a Mac environment.

- [Microsoft Word for Mac](#)

PowerPoint for Legal Professionals Manual

Create clearer, more professional presentations with guidance tailored to legal audiences. Learn practical techniques for organizing content, improving slide design, and presenting information more effectively.

- [Microsoft PowerPoint](#)

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Barron Henley, Paul Unger, Debbie Foster & more.
- ✓ **Built for legal**
Designed the way your firm works.