



Wolters Kluwer  
Law & Business

## MyECFMail Quick Start Guide A Best Case® Bankruptcy Add-on Tool

Get organized with this efficiency tool! Don't waste time searching, downloading and saving ECF files, simplify the process with MyECFMail. In this guide, learn how to setup email accounts, store Free Looks, view ECF activity in Best Case Bankruptcy and integrate this solution into your firm's workflow process.

### TABLE OF CONTENTS

30-day Trial .....	2
System Requirements .....	2
MyECFMail Prerequisites	
Gmail account .....	3
CM/ECF setup .....	3
Getting Started .....	4
MyECFMail Components	
E-Mail Manager .....	5
Case Viewer in Best Case Bankruptcy .....	6
ECF Calendar .....	7
Training and Support .....	8
Licensing and Pricing .....	9





## Welcome

MyECFMail, from Wolters Kluwer Law & Business specifically developed for Best Case Bankruptcy users, is a time-saving ECF workflow solution developed to help organize, store and calendar the high number of emails transmitted from the Courts.

It streamlines the ECF process after you file a case with Best Case by automatically downloading your Free Looks from the Court's website and populates upcoming events such as 341 meetings to the ECF Calendar.

Plus, access all Bankruptcy Court transmitted emails, affiliated PDFs, Proofs of Claim and events for a case directly from the Best Case Bankruptcy Case Viewer. Easily view all CM/ECF activity for a particular client in a few clicks.

Try MyECFMail free for 30-days! Download your free trial at [www.bestcase.com/memdownload](http://www.bestcase.com/memdownload)

### MyECFMail 30-Day Trial

#### **Trial Start Date:**

The 30-day trial begins once MyECFMail is launched

**Cost:** Free for 30 days

#### **30-Day Trial License:**

- One installation of MyECFMail
- Download to one workstation
- Access: One person at a time
- User Account: One per installation

#### **Expiration:**

- MyECFMail will expire 30 days after MyECFMail is launched
- One free 30-day trial per Best Case Bankruptcy License, every six months
- After 30 days: No new emails or pdfs will be downloaded, but the program will work in the offline mode

#### **Trial Version Rules and Regulations:**

- Requires a current Best Case Bankruptcy License
- Free Trials can not be combined with any other offers

### SYSTEM REQUIREMENTS

- **Operating System:** Windows® XP or better with .NET framework 2.0 or better
- **Internet Connection:** Ethernet
- **Gmail Account:** New account for MyECFMail
- **Screen Resolution:** 1024 x 768
- **Computer Memory:** Minimum 1GB

# Pre-Installation



Prior to installing MyECFMail you must complete the following steps:

## 1 Create a NEW Gmail account

**IMPORTANT:** It's required that you register for a completely new Gmail™ webmail service account. This account should be used exclusively with MyECFMail. DO NOT USE an already active Gmail account as you may lose existing emails. Register today:

1. Go to [www.gmail.com](http://www.gmail.com)
2. Click **CREATE AN ACCOUNT**
3. Complete the required information  
**NOTE:** You may be required to verify your account with a code sent via voice or text message.

Once you've completed the set up process, sign into your new Gmail account and configure the following setting:

1. Go to **MAIL SETTINGS** in the upper right hand corner
2. Click **FORWARDING AND POP/IMAP**
3. In the **POP DOWNLOAD** section, go to Option 2: When messages are accessed with POP, select **ARCHIVE GMAIL'S COPY**
4. Click **SAVE CHANGES**

**NEED HELP?**  
[www.mail.google.com/support](http://www.mail.google.com/support)

## 2 Update your CM/ECF account with the new gmail account

1. Sign in to the Court's CM/ECF website
2. Go to **UTILITIES**
3. Choose **MAINTAIN YOUR ECF ACCOUNT**
4. Click **E-MAIL INFORMATION**
5. Add your new Gmail account as a **SECONDARY ADDRESS**

**NOTE:** We recommend you do this for a transitional period until you are comfortable with receiving your notices only through MyECFMail.

6. Select **SEND NOTICES IN CASES IN WHICH I AM INVOLVED**
7. Select **HTML FORMAT** for most modern email programs or ISP email service
8. Submit your changes and Logout

**VIEW A WEBTUTORIAL**  
[www.bestcase.com/webtutorials](http://www.bestcase.com/webtutorials)

### FREQUENTLY ASKED QUESTIONS:

- Q:** Why do I need to create a brand new email account? All my emails already go into a Gmail account.
- A:** If you set up MyECFMail with your established email account, you will lose your existing emails. Keeping all your ECF notices in one email box, also helps keep you organized.
- Q:** Why is a Gmail account required?
- A:** Gmail accounts are free to setup and allows POP access.

# Getting Started



## SETUP WIZARD

The Setup Wizard launches the first time you run MyECFMail. It takes you through entering user and email account information. This data must be entered to begin using MyECFMail.

## User Account

Create a User account by entering a User Name and Description (optional).

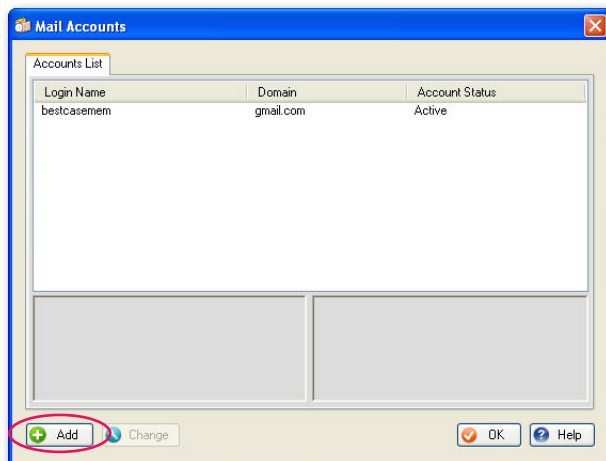
**NOTE:** The 30-day trial includes one user account. Multi-user accounts are available when you purchase a MyECFMail License. Call 1.800.492.8037 for more details.

## Email Accounts

Set up your email account information with an email address dedicated to receive only ECF notices from the Court. We require you to create a new account with Gmail. See [Create a Gmail account](#) on page 2 for more information. You can set up as many email accounts as you need. For example, one support worker can manage Court notices for multiple attorneys and email accounts.

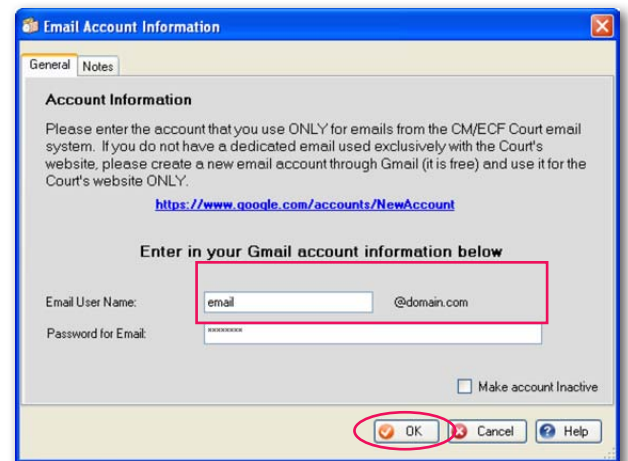
### Step 1:

In the mail account window, click **ADD**.



### Step 2:

Enter your new Gmail user name and password. Click **OK**. Repeat for additional email accounts.



### Optional Settings:

**Notes Tab:** Enter in a description or note in this tab. This information does not print or appear anywhere in the program.  
**Make Account Inactive:** Mail accounts can not be deleted but can be rendered inactive by checking this box.

# Emails & Free Looks



## E-MAIL MANAGER

Developed specifically for handling ECF emails, the Email Manager delivers enhanced capabilities to more easily manage the high number of ECF emails transmitted from the Courts.

## MyECFMail: E-Mail Manager

### Automatically Downloads and Saves Free Looks:

- Free Looks from the Court— PDFs are automatically downloaded and saved for you.

### Intuitive Interface

- Tabbed Display — The inbox shows all active emails from the last 16 days and auto-archives older emails for faster loading.
- Advanced Search Capabilities — Easily search by case number or case name and results are displayed in the main content window.

### Enhanced Tool bar

- Access critical functions to view or save PDFs and emails and to add custom filters.
- Open the Case Viewer to see all activity for a particular client.

### Filters Help Sort Emails by:

- Case number
- Case Debtor(s) Name
- Court
- Custom User-defined — create your own!

The screenshot displays the MyECFMail E-Mail Manager interface. On the left, there are panels for 'Case Viewer Search' (with fields for Case Number and Case Name) and 'Case Information' (showing Case Number 11-00266). The main area features a table of search results for 'July 2011 [3 items]':

Case #	Debtor(s)	Subject	Date Sent	Message From
11-00266	Joseph Wayne Sample	5:11-bk-00266 Voluntary Petition (Chapter 13)	19-Jul-2011	PAMB_TrainDB@pamb.uscourts.gov
11-00266	Joseph Wayne Sample	5:11-bk-00266 Employee Income Records (Payment Advices)	19-Jul-2011	PAMB_TrainDB@pamb.uscourts.gov
11-00266	Joseph Wayne Sample	5:11-bk-00266 Matrix filed/Creditor List Uploaded	19-Jul-2011	PAMB_TrainDB@pamb.uscourts.gov

Below the table, a detailed view of an email is shown. It includes a public access notice, the header 'U.S. Bankruptcy Court Middle District of Pennsylvania - TRAIN', and a 'Notice of Electronic Filing' for a transaction received from Testing Bestcase on 7/19/2011. The email content includes:

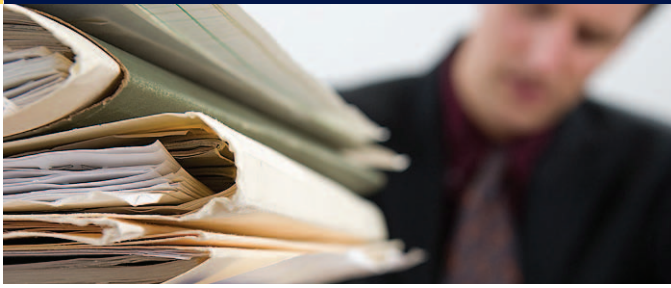
**Case Name:** Joseph Wayne Sample  
**Case Number:** 5:11-bk-00266  
**Document Number:** 3

**Docket Text:** Employee Income Records (Payment Advices) Filed by Testing Bestcase of Tester Account on behalf of Joseph Wayne Sample. (Bestcase, Testing)

**Document description:** Main Document  
**Original filename:** C:\ECF\PAM\JL\Paystubs.PDF  
**Electronic document Stamp:**

**The E-Mail Manager:** Delivers enhanced functionality over standard email platforms. It downloads and saves your Free Looks, offers advanced filtering capabilities and shortcuts for organizing the all your Court emails.

# Emails & Free Looks



## INTEGRATION WITH BEST CASE

Easily view ECF activity associated with a specific client case without ever leaving Best Case. With MyECFMail open, the location of these files are automatically recognized and accessible.

### MyECFMail Case Viewer

#### Docket Report Tab:

- View Documents—Open and review PDFs of your Free Looks.
- View Email—Displays the docket text of the email.

#### Proofs of Claim Tab:

- Displays all related Proofs of Claim for the case.
- Easily Identify the claim name, address and amount.

#### Calendar Events Tab:

- Events and meetings are listed including location, date and time.
- With a click, export events to your calendar program

#### Two Ways to Access the Case Viewer:

- From MyECFMail – With an email or case selected, click the Case Viewer icon in the top tool bar.
- From Best Case – Once a case is filed, the MyECFMail button is displayed in the ECF Manager or select Open Case Viewer from the Tools Menu.

#### Print Activity for a Client:

- Easily print a list of Court emails, Proofs of Claim and events for a client from the Case Viewer.

**NOTE:** To access up-to-date activity in Best Case you must have the latest version of MyECFMail installed and running.

The screenshot shows two overlapping windows of the MyECFMail Case Viewer application. The left window is titled 'MyECFMail Case Viewer: 10-70004 - Joseph Wayne Sample and Sarah Lynn Sample' and has the 'Docket Rpt (4)' tab selected. It displays a table with columns 'Filed On', 'Doc#', and 'Docket Text'. Below the table are 'View Document' and 'View Email' buttons. The right window is titled 'MyECFMail Case Viewer: 10-70004 - Joseph Wayne Sample and Sarah Lynn Sample' and has the 'Proof Of Claim (12)' tab selected. It displays a table with columns 'Filed On', 'Claim#', 'Claim Amnt', and 'Claim Name'. Below the table are 'View Document' and 'View Email' buttons. At the bottom of the right window, there are input fields for 'Case#', 'Case Name', 'Claim Name', 'Claim Address', and 'Claim Amount'.

Filed On	Doc#	Docket Text
07/19/10	01	Chapter 13 Voluntary Petition with Statement of Financial Affairs, Schedule(s) A, B, C, D, E, F, G, H, I and J, Summary of S
07/19/10	04	Chapter 13 Statement of Current Monthly and
07/19/10	02	Chapter 13 Plan filed by Best Case on behalf
07/19/10	03	Statement of Social Security Number(s) filed

Filed On	Claim#	Claim Amnt	Claim Name
05/12/10	03	10000.00	Recue Inc
05/12/10	03	10000.00	Recue Inc
05/12/10	03	10000.00	Recue Inc
05/13/10	04	2000.00	KAS Inc
05/13/10	04	2000.00	KAS Inc
05/13/10	04	2000.00	KAS Inc
05/18/10	06	1000.00	Krumm Inc
05/18/10	05	1000.00	Krumm Inc
05/19/10	07	1000.00	Craig, Inc.

**Case Viewer in Best Case:** Click a tab to instantly view Docket Text including emails and PDFs, Proofs of Claims and calendar events associated with a client file.

# Bankruptcy Events



## CALENDAR

Events associated with emails will automatically populate in the ECF Calendar portion of MyECFMail. Create rules and set alarms to easily identify these events and remind you when an event is approaching.

### MyECFMail: ECF Calendar

#### Multiple Calendar Views:

- Daily, Work Week, Full Week or Monthly

#### Choose from All-User View or Single User:

- Display an individual user's calendar or view all accounts

#### Calendar Population:

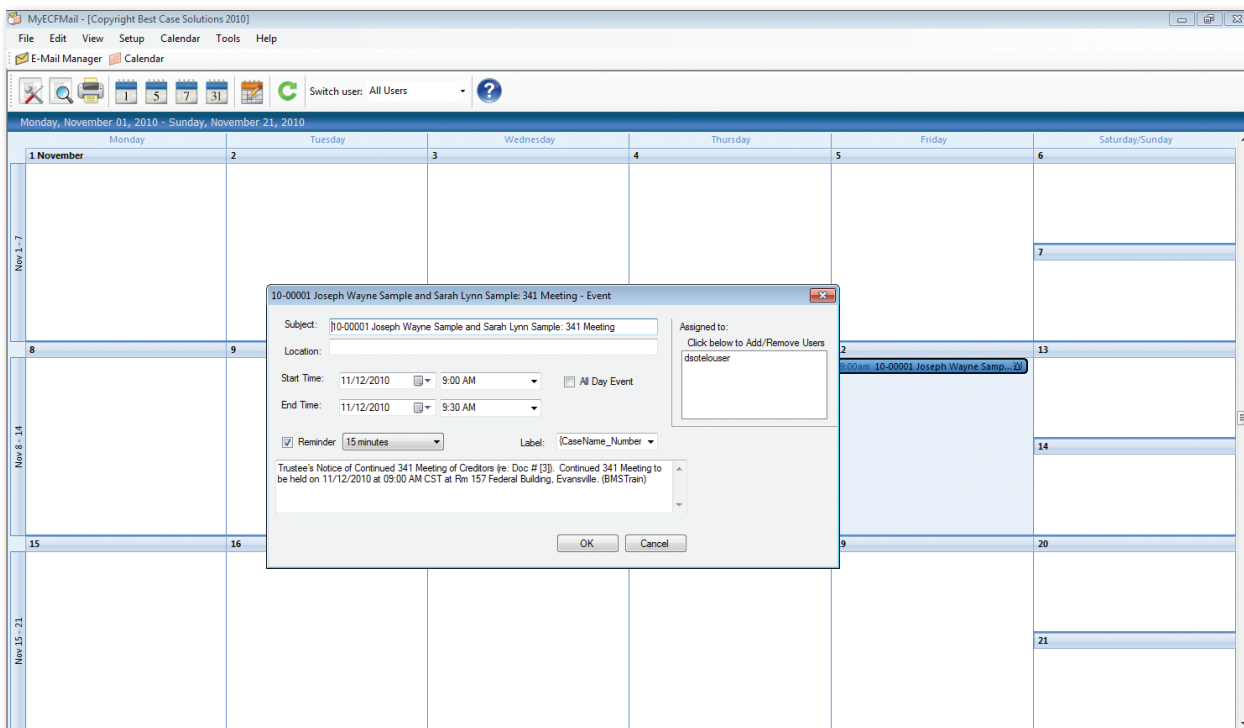
- ECF events are auto-populated into the built-in ECF Calendar based on the court docket text.
- Events can be automatically transferred to Outlook or manually transferred to Google Calendar or iCalendar compatible software with the Calendar Export Wizard.

#### Calendar Rules:

- General Hearing
- Discharge Deadlines
- Proof of Claim Deadlines
- 341 Meeting
- Confirmation Hearing
- Continued Hearing

#### Easily Identify Events:

- Color-coded to indicate specific events
- Alarms are automatically set to remind you of upcoming events.



**The ECF Calendar:** Populated based on the docket text data included in ECF emails. The data transferred includes Event Subject, Location, Start and End Time, Set Reminders, Description, Assignment and Label.

# Support and Services



## TRAINING RESOURCES

A variety of educational tools and resources are available to help you get up and running quickly and easily. Call a representative or search the Help File and begin exploring MyECFMail in more detail today.

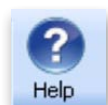


### Contact Technical Support

#### Free support

- Phone: 1.800.492.8037
- Email: [help@bestcase.com](mailto:help@bestcase.com)
- Monday - Friday 8:00 am - 5:30 pm CT

Get your questions answered by technical experts. These services are available during the 30-day trial or with an active MyECFMail maintenance package.



### Access the Help File

#### MyECFMail Help File

Get context-sensitive help within MyECFMail. Click the Help button and access the capabilities to:

- Easily search for information based on a keyword
- Use the Index to identify MyECFMail topics
- Watch web tutorials



### View Online Training

#### Get complimentary access to:

**Web tutorials**—Watch short, recorded demonstrations that walk you through the basics of MyECFMail.

[www.bestcase.com/webtutorials](http://www.bestcase.com/webtutorials)

**On-demand seminar**—View a pre-recorded event showcasing how to use MyECFMail. Get a tour and see how easy it is to access and organize your free looks. To help keep your schedule

[www.bestcase.com/mem](http://www.bestcase.com/mem)

**Live online demonstration**—Attend a live online event and delve into MyECFMail and discover tips and tricks for streamlining your ECF emails including applying filters and saving your free looks.

[www.bestcase.com/memdemo](http://www.bestcase.com/memdemo)

# Pricing and Licensing



## ORDERING INFORMATION

Flexible licensing options are available and your initial purchase includes the annual MyECFMail Maintenance Plan.

MyECFMail licensing is separate from your Best Case® Bankruptcy license. Call us at 1.800.492.8037 to see which license is ideal for your firm.

### Single-User License:

- Includes one user account
- One installation on a single workstation or
- Single access over a Local Area Network
- One office location—use on a laptop is not recommended unless that is your primary computer

### Multi-User License

- Includes three user accounts
- Installation on a Local Area Network
- Three users can simultaneously access the program
- One office location
- Additional simultaneous user licenses are available
- Multiple site licenses are available for additional office locations at a reduced price.

#### Pricing:

License	Initial Cost*	Annual Maintenance
Single-User	\$350.00	\$175.00
Multi-User	\$750.00	\$375.00
Additional Users	\$125.00	\$75.00



#### 60-Day Money-Back Guarantee

Your order is absolutely risk-free. If you're not 100% satisfied, simply return the materials within 60 days of your purchase date for a complete refund.



#### Annual Maintenance Plan Includes:

- Access to incoming mail
- Software updates
- Toll-free technical support

**Complete the order form and call 1.800.492.8037 or fax it to 1.847.492.8038!**

LICENSE: \_\_\_\_\_

COST: \_\_\_\_\_

TAX: \_\_\_\_\_

TOTAL: \_\_\_\_\_

We collect local sales tax for all states except: AK, DE, MT, NH, OR, DC, PR. Residents of AL, AZ, CO, IA, MO, NM apply local use tax rate. IL Residents use 9.5%

NAME: \_\_\_\_\_

FIRM: \_\_\_\_\_

SERIAL # \_\_\_\_\_

MAILING ADDRESS 1: \_\_\_\_\_

MAILING ADDRESS 2: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_

ZIP: \_\_\_\_\_

CREDIT CARD # \_\_\_\_\_

EXP. DATE: \_\_\_\_\_

NAME ON CARD (PLEASE PRINT): \_\_\_\_\_

SIGNATURE: \_\_\_\_\_