JOTA2® Client How to Guide

Need help? Contact your Local Bureau: 1300 548 787



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Accessing JOTA2[®]

- Go to: <u>https://jota2.timg.com/</u> NB: JOTA2[®] works best with Chrome but is compatible with all web browsers, including Internet Explorer 11 or greater.
- Log In → Enter your Email Address and Password → Sign In

	timg JOTA: REGISTER HELP EDISCOVER	(LOG IN
timg JOTA: Welcome back! Email Password Forgot Password? Signin 1 Register as a new user I Register as a new user I Register as a new user		Welcome back! Email Password Forgot Password? Sign in	Secure transfers of high value items from point A to point B	

 If you are new to JOTA2[®] please Register as a new user. Your registration will be sent to a Bureau Manager for approval. Once approved you will receive an email to create your JOTA2[®] password and then your JOTA2[®] account will be active for you to login and use.



Forgot Password?

The **Forgot Password?** link can be used to reset your password if it's ever forgotten.

• Select Forgot Password?

timg °jota2	
Welcome back! Email	
Password	
	Forgot Password?
Sign in	
Register as a new user	

• Enter your email address → Email Link

timg [®] JOTA2 REGISTER		LOG IN
Forgot your passw Enter your email. Email	ord?. jjones@test.timg.com Email Link	

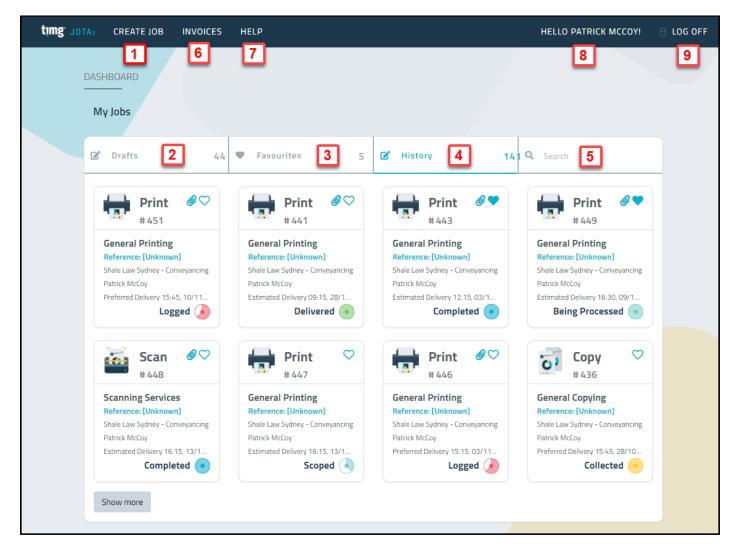
If the email address is active, a password email link will be sent to you to reset your JOTA2[®] password.



Dashboard

Once logged into JOTA2[®] you will see the **DASHBOARD** screen showing:

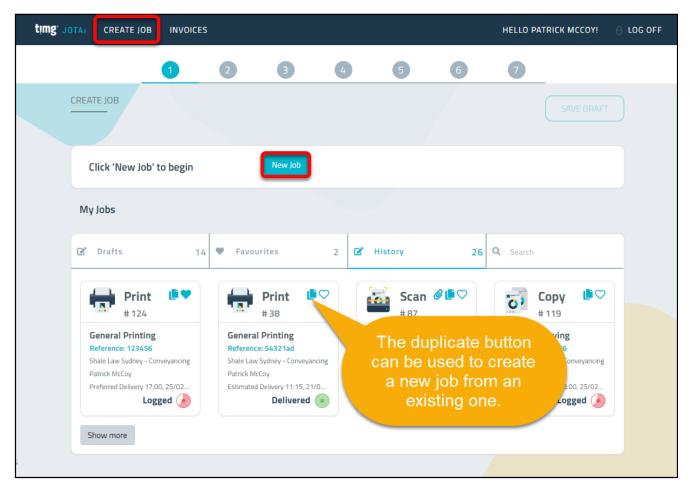
- 1. **CREATE JOB:** menu item to create new jobs and duplicate jobs.
- 2. Drafts: to access saved drafts, jobs you started to create but haven't submitted.
- 3. **Favourites:** to access jobs marked as favourites using the heart icon.
- 4. **History:** to access submitted jobs.
- 5. Search: use job details to find a job.
- 6. INVOICES: menu item to access invoices and credit notes.
- 7. **HELP:** menu item to access the JOTA2[®] webpage with training resources to help you use JOTA2[®].
- 8. **Account Settings:** to access your JOTA2[®] account settings and change your password or manage your buddies.
- 9. LOG OFF: to exit JOTA2®



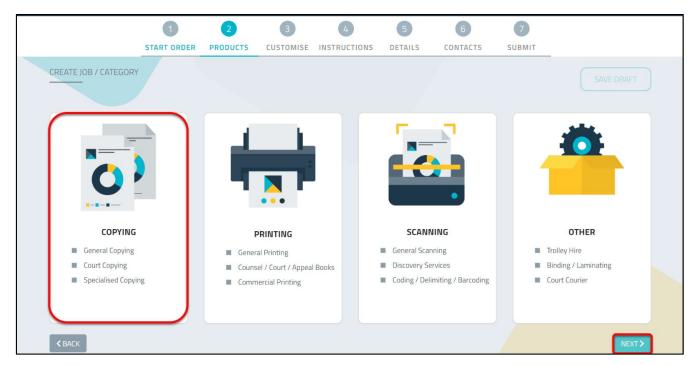


Create Job

• Step1: CREATE JOB → New Job



• Step 2: Select Product → NEXT





- **Step 3:** Based on the Product selected, there will be different options available:
 - + To select the option
 - To remove the option
- Select all required options or leave blank if none are required → NEXT

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE		5 DNS DETAILS	6 CONTACTS	7 SUBMIT	
CREATE COPYING JOB / C	OPTIONS							
Please select Copyir	ng options belov	V						
	AVAIL	ABLE				SEL	ECTED	
Court Copying				(+)	Tagged Copying			
					Paginated Copyir	ng		-
								_
< BACK								NEXT >

- Step 4: There are 2 ordering instruction options:
 - **GUIDE QUESTIONS** is the recommended option with questions prompting the required information to be entered.
 - **MANUAL ENTRY** enables instructions to be copied and pasted. This is particularly useful if you have been emailed the job instructions.
- Choose an ordering option → NEXT

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT
	NTING JOB / INSTRUC						
	A	GUIDED QUESTION Recommended o Easy questions tl processing and fa	ption of ordering nat allows quick				y what you want? Then option and you can type
< BACK							NEXT >



- **Step 5:** The guide questions will vary depending on the product and options selected.
 - **CUSTOMISE** will display the list of options available for this order enabling each option to be added or removed.
- Enter all required details

1 START ORDER	2 3 PRODUCTS CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT		
CREATE COPYING JOB / DETAILS Before we gather the specific details o	of your Copying job, please	customise as re	quired	Save Draft o used to ensu job details lost befo submitting o	ure the aren't ore	SAVE DRAFT	
Number of Items (enter one or more Folders: 2) See an example <u>here</u>	Rundlag		want to subr later tim	nit at a 🏑	 Tagged Copying Paginated Copying 	
Folders: 2 Manila Files:		Plans:			Other:	O Court Copying	
Boxes: 1		Discs:					
Number of Copies Copies Required: 10							
Paginated Copying Paginate: Ocopies Only Originals Position of label on page: Top Left Top Centre Bottom Left) Top Right) Bottom Right	0	ber sequence: Continuously acro Start each folder at of number: 1, 2, 3, 001, 002, 003, PREFIX-001, PRE Specify other:	from 1	13,	Remove	
Matter/Reference Number: Ref#123456 Billing Description:							
BillCode123456 Special Instructions:							
Please replace the tags after copying							
КВАСК						NEXT >	

Matter/Reference Number is mandatory for some Clients.

Billing Description appears on the invoice and is mandatory for some Clients.

Special Instructions is optional and can be used for special instructions or additional details.

• Select NEXT



• **Step 6:** By default, you will appear as the person responsible for all processing and communications.

Other contacts can be added, and you can remove yourself from all except Logged By. **NB: There must be at least 1 contact for each responsibility.**

• ADD NEW CONTACT

	1	2	3	4 5	6	7	
	> CONTACTS					SAVE DRAFT	
	ADD EXIST	ING		ADD NEW CONTACT			
Job Contacts							
Operator Operator MW Responsibilitie	+ C	ssing and Co	mmunications	Drag and dro	p contact from abo	ve to relevant responsibilit	y
Logged By	Pickup		Technical Questions	Status Updates	Delivery	Invoice	
Operator MW	Ope	rator MW	Operator MW	Operator MW ×	Operator M	W Operator MW X	

Enter the new contact's details → Add Contact
 NB: Address isn't mandatory but please include it for Pickup and Delivery Contacts.

	Add Jo	ob Contact	
First Name	Donald	Address 1	
Last Name	Scrooge	Address 2	
Position TItle	Finance Manager	City/Suburb	
Business Hours Telephone	0212345678	State	
After Hours Telephone	0212345678	Post Code	
		Country	
		Email	finance@shalelaw.com
			Add Contact Cancel



• Select the responsibilities for the new contact using the + or by dragging and dropping \rightarrow NEXT

Job Contacts					
Operator	+ 🗹 🛛 🕌	ance Manager ×			
Operator MW	Dor	O Pickup			
		O Technical Questions			
Responsibilities	Responsibilities for Processing and		Drag and drop co	ontact from above to	relevant responsibility
Logged By	Pickup	O Delivery	Status Updates	Delivery	Invoice
		⊘ Invoice			
Operator MW	Operator MW	Operator MW	Operator MW	Operator MW	Operator MW
					Donald Scrooge X
< BACK					

- Step 7: Enter if a Quote is required, Delivery Timing and Preferred Delivery Time -> CREATE JOB
 - **Flexible** means your Preferred Delivery Time can be altered by a day or more.
 - **Limited Flexibility** means your Preferred Delivery Time can be altered by hours.
 - **Urgent** means you do not want your Preferred Delivery Time to be changed.

1 START ORDER PR	2 DUCTS		CUST	3 OMIS	E	IN		4 5 6 7 CTIONS DETAILS CONTACTS SUBMIT
REATE PRINTING JOB / SUBMIT								SAVE DRAFT
Quotation								
Do you require a quotation prior to commencement of this job?								
	<		Ju	ily 202	1		>	
lob Timing	Mo	Tu	We	Th	Fr	Sa	Su	
Job Timing	28	29	30	1	2	3	4	
TIMG offers an on-demand service. We striv		6	7	8	9	10	11	ng us an indication of how flexible your delivery timeframe is, you allow us to provide you the
best possible price while still meeting your r	12	13	14	15	16	17	18	
While we promise to make every effort to m	eet y 19	20	21	22	23	24	25	know whether your turnaround time frame is:
Delivery Timing:	26	27	28	29	30	31	1	
Flexible	2	3	4	5	6	7	8	
Limited Flexibility			-	G				
Urgent				٣				
Preferred Delivery Time	30/	07/202	21 10:4	5 AM				
								_
< BACK								CREATE JOB

Your job has been submitted, use **Job History** to access the job and view its progress.



Job History

Job History can be accessed from the **Dashboard** and **Create Job** screens.

CREATE JOB			SAVE DRAFT)
Click 'New Job' to begin	New Job			
My Jobs				
🖉 Drafts 1	♥ Favourites 1	tory 2	Q Search	
Scan ■ ♥ # 32 1	Copy # 31			
Scanning Services Reference: 20200116a 2 Shale Law Sydney - Conveyancing	General Copying Reference: Ref#123456 Shale Law Sydney - Conveyancing			
Patrick McCoy 3b Estimated Delivery 15:15, 21/01/2020 4	Patrick McCoy Preferred Delivery 14:30, 17/01/2020			

Each job summary will display the following details:

- 1. **Job ID number**: Each job is assigned a unique job ID number. Please quote this number when speaking to TIMG staff.
- 2. **Reference Number**: Is the matter/reference number you entered when you created the job.
- 3. A) **Preferred Delivery** is your nominated preferred delivery time and will show after you first submitted the job.

B) **Estimated Delivery** will display after TIMG staff have accepted and scoped the job.

4. **Status**: Hover your mouse over the circle icon to see the current status of your job.

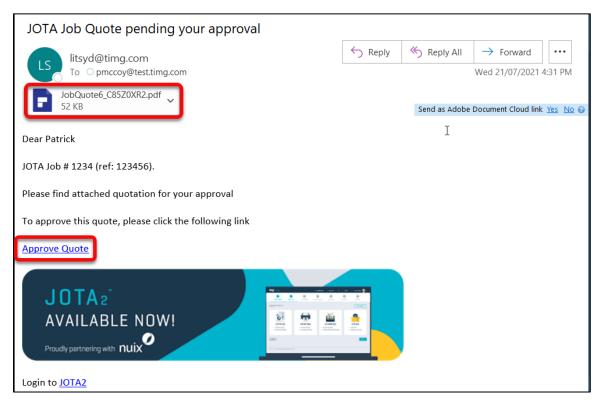
Click on a job to see its full details.



Quote

If you requested a quote when creating a job, you will receive an email with the quote attached and a link to approve or reject the quote.

• After viewing the quote click the Approve Quote link to accept or reject the quote.



Alternatively go to your JOTA2® dashboard to accept or reject the quote.

timg JOTA: CREA	TE JOB COURIER INVOICES HELI	PEDISCOVERY		HELLO PATRICK MCCOY!
(DASHBOARD My Quotes			
	Job Id: 1242 View Job Details Quotation: 16 Download Quote Amount: \$1.00 Quote Sent: 22 Jul 2021 11:30 AM Approval: Accept Reject Approval option is required. Submit: Accept Quote	Quotation: 7 Downlo Quote Amount: \$250.00 Quote Sent: 21 Jul 202 Approval: Acccl	Quote Am 21 04:34 PM Quote Sen ept Reject Approval: option is required.	ount: \$55.00 tt: 21 Jul 2021 03:36 PM
	🗭 Drafts 7	♥ Favourites 5	🗹 History 56	Q Search
	● Other ♥ ♥ # 1247	● Other ♡ # 1246	● Other ♥ ♥ # 1245	● Other ♥ + 1244
	Consumables Reference: 123456 Shale Law Sydney - Criminal Law Patrick McCoy Estimated Delivery 16:30, 29/07/2021	Consumables Reference: 123456 Shale Law Sydney - Criminal Law Patrick McCoy Estimated Delivery 16:15, 30/07/2021	Consumables Reference: 123456 Shale Law Sydney - Criminal Law Patrick McCoy Estimated Delivery 15:45, 29/07/2021	Consumables Reference: 123456 Shale Law Sydney - Criminal Law Patrick McCoy Estimated Delivery 17:00, 30/07/2021



Job Notes & Communication

Job Notes can be used to communicate with TIMG staff about a job.

• Open an existing job through **History** or **Favourites** → **COMMUNICATION HISTORY**

1 START ORDER	2 PRODUCTS			5 DETAILS	6 CONTACTS	7 SUBMIT
 EW COPYING JOB #92 / DET		Copying job, please	e customise as r	COMMUNICATI	ION HISTORY	SAVE CANCEL JOE
Number of Items (enter Folders:			Bundles:		Othe	
Manila Files:			Plans:			
Boxes: Number of Copies			Discs:			
Copies Required:	10					

• Select Note Type → Enter Notes → Add

	Job Notes - Job 92	н
	Conversation History - No messages found	
_	Add Job Notes	
Note Type Notes	Technical Instruction Issue Other Please make 20 copies instead of 10	
_		Add

• Your Job Note has been added.

	Job Notes - Job 92	н
	February 2020 Patrick McCoy 17/02/2020 10:53:43 AM INSTRUCTION Please make 20 copies instead of 10	•
	Add Job Notes	+
Note Type Notes	Technical Instruction Issue Other	

NB: After TIMG staff have read the note, they will mark it as acknowledged. 🧔



When TIMG staff respond to your Job Note you will see the COMMUNICATION HISTORY flag with an unread job note.

Emails will be sent to alert the nominated job stakeholders to the new Job Note as follows:

- > For Technical Notes your nominated Technical Questions contacts will receive an email.
- > For Instruction, Issue and Other Notes your nominated Status Updates will receive an email.
- Select COMMUNICATION HISTORY

1 START ORDER	2 PRODUCTS	3 CUSTOMISE		5 DETAILS	6 CONTACTS	7 SUBMIT
VIEW COPYING JOB #92 / DET Before we gather the spec		^r Copying job, pleas	e customise as requ		TION HISTORY	SAVE CANCEL JOB
Number of Items (enter	one or more) See	an example <u>here</u>	Bundles:		Other	
Manila Files:			Plans:			
Boxes:			Discs:			

• Click the Job Note to acknowledge you have read it.

	Job Notes - Job 92	н
	February 2020	*
	Patrick McCoy 17/02/2020 10:5343 AM INSTRUCTION Please make 20 copies instead of 10	
JJ	1//02/2020 11.01.15 AM w u for the note, we will make 20 copies as requested.	
		Ŧ
	Add Job Notes	
Note Type Notes	Technical Instruction Issue Other	



Duplicate Job

The duplicate icon **b** is a quick way to create a new job from an existing one.

Create Job → History or Favourites → choose job to duplicate
 NB: duplicate job icon isn't available on the Dashboard, you must be on the Create Job screen.

timg" JOTA2 CREATE JOB INVOICES				HELLO PATRICK	MCCOY! 🖯 LOG OFF
1 START ORDE	2 3 R PRODUCTS CUSTOMISE IN	4 5 ISTRUCTIONS DETAILS	6 CONTACTS	7 SUBMIT	
CREATE JOB					
Click 'New Job' to begin	New Job				
My Jobs				I	
🕑 Drafts 14	Favourites	2 🗹 History	27	Q Search	
Print # 129	Print # 124	Print # 38		Scan #87	
Counsel Brief	General Printing Reference: 123456	General Printing Reference: 54321ad		Scanning Service Reference: 200214a	
Reference: 123456 Shale Law Sydney - Conveyancing	Shale Law Sydney - Conveyancing	Shale Law Sydney - Conve	vancing	Shale Law Sydney - Co	
Client BM	Patrick McCoy	Patrick McCoy	, ,	Patrick McCoy	, .
Preferred Delivery 15:30, 27/02/2020	Preferred Delivery 17:00, 25/02/2020	Estimated Delivery 11:15,		Estimated Delivery 16:	
Logged 🌛	Logged	<i>•</i>) (•	Delivered 💿		Delivered •
Show more					

Check and edit the required details for the new job before submitting.



eDOC Files

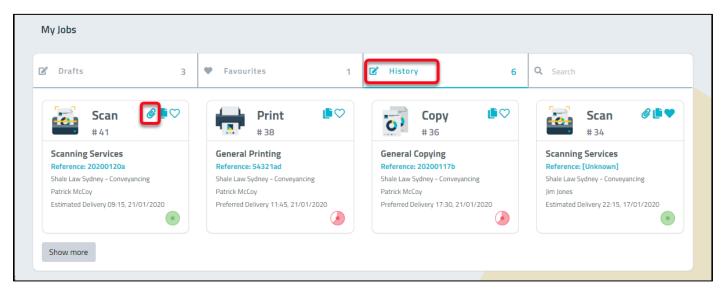
eDOC files is the JOTA2® repository for electronic files and can be accessed by a job's Paperclip icon.

2000MB is the maximum size for <u>each</u> file. If the total job is more than 5GB we recommend providing the files by USB, as it will be faster to upload and download.

eDOC is particularly useful for:

- **Print jobs** If you nominate to upload the files you want printed. When creating the job, the Guide Questions will prompt you to upload the file(s) to be printed.
- **Scan jobs** If you instruct TIMG to upload the scanned files into JOTA2[®]. The Paperclip icon will appear when the scanned files are ready.

Tip: For large jobs, zip the files to make upload and download faster.



You may have multiple folders and files to access.

timg JOTA: CREATE J	OB INVOICES	HELP	HELLO PATRICK MCCOY!	🖯 LOG OFF
Click the for name to co the folder view its con	EDOCS 448 - 1 SCAN Dider pen and	 VELP Scanning Services - Shale Law Sydney - Conveyancing : Patrick McCoy UNING SERVICES DOCUMENTS 1 10 to or drop files here to upload to this folder UttDu448_031120.1 10 to drop files here to upload to this folder UttDu448_031120.1 10 to drop files here to upload to this folder UttDu448_031120.1 10 to drop files here to upload to this folder Scanned File 3.pdf 0 1 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 1 10 to drop files here to upload to this folder Scanned File 9.pdf 0 11 10 to drop files here to upload to this folder Scanned File 6.pdf 0 11 10 to drop files here to upload to this folder Scanned File 6.pdf 0 11 10 to drop files here to upload to this folder Scanned File 6.pdf 0 11 10 to drop files here to upload to this folder Scanned File 6.pdf 0 11 10 to drop files here to upload to drop files here to upload to drop files here to upload to drop files file files you uploaded, before the job is stander 	the following options: ito a zip folder itents contents	
		Scanned File 2.pdf 🕚 🛍 🛓		



eDOC Share Folder

eDoc share folder enables eDoc files to be shared with other people including non-JOTA2® users.

• Go to the job eDocs → Share folder

timg. Jolas.	CREATE JOB INVOICES HELP EDISCOVERY	HELLO PATRICK MCCOY!
	EDOCS 1020 - Scanning Services - Shale Law Sydney - Conveyancing : Patrick McCoy SCANNING SERVICES DOCUMENTS DobD 1020 Click or drop files here to upload to this folder Scanned File 1.pdf Click or drop files here to upload to root folder	

- Enter share folder details:
 - 1. **Email** email address of the eDoc share folder recipient to be emailed the eDoc share link.
 - Password create a password which the recipient must use to access the eDoc share folder. The password must be minimum 8 characters, at least one uppercase letter, one lowercase letter, one number and one special character. Click the eye icon to show or hide the password.
 NB: The password isn't emailed to the person receiving the eDoc share folder email, for security reasons you must provide it separately.
 - Expiry date the date the eDoc share folder link will expire.
 The expiry date must be before the earliest expiring eDoc file within the folder.

Select Send Email

SHARE FO	LDER: JobID 1020	
Email:	pfan@test.timg.com	
Password:	2	Ø
Expiry Date:	30/06/2021 a 3 NOTE: Documents will be deleted on 22/07/2021	
		Cancel Send Email

- An email is sent to the recipient with a link to the eDoc share folder.
- You must provide the recipient with the eDoc share folder password you created, so they can access the eDoc folder.



eDoc share folder details can be:

- 1. View, Update (password or expiry date) or Resend Email to recipient.
- 2. Delete to stop eDoc share folder access.
- 3. Cancel to close Share Folder window.
- 4. Add New to add another recipient to access the eDoc share folder.

SHARE FOLDER: JobID 1020		
Email pfan@test.timg.com	Expiry 30/06/2021	Action
	3 Cano	el Add New

When viewing the eDoc Share Folder details you can:

- 1. **Resend Email** with the eDoc share folder link to the recipient.
- 2. **Update** to save changes to the password or expiry date.

NB: Link can be used to test access to the shared eDoc folder.

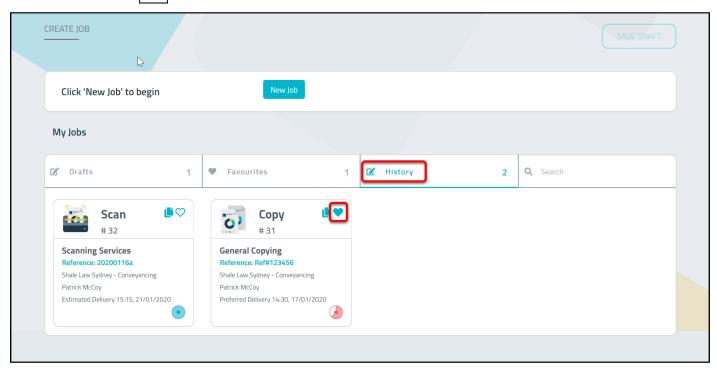
SHARE FOLDER: JobID 1020					
Email:	pfan@test.timg.com				
Password:	····· · · · · · · · · · · · · · · · ·				
Expiry Date:	30/06/2021 NOTE: Documents will be deleted on 22/07/2021				
Created:	Wednesday, 23 June 2021 11:12 AM				
Link:	https://jota2uat.timg.com/app/eDocs/folderShareDownload/b52e4287-b935- 4d98-9cd0-9a6878e65af5				
Resend Ema	ail 1 Cancel Update				
Resend Eme					



Job Favourites

Favourites is useful for jobs you want to keep updated with or are likely to duplicate in future.

Click the heart icon 💙 to add jobs to your **Favourites**.



Click Favourites to see your favourite jobs.

Click 'New Job' to begin		New Job					
My Jobs							
🗹 Drafts	1	Favourites	1	🖍 History	2	Q Search	
# 31 General Copying							
Reference: Ref#123456 Shale Law Sydney - Conveyancing							
Patrick McCoy Preferred Delivery 14:30, 17/01/2020							

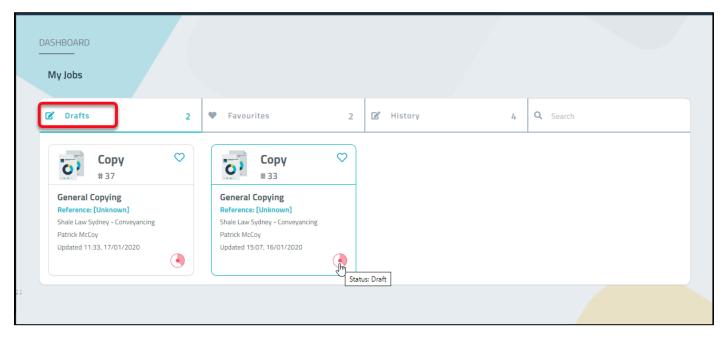
To remove jobs from your favourites, unselect the heart icon. $|\heartsuit|$



Job Drafts

Drafts contains jobs you have saved but not submitted yet.

Click on a draft job to continue to complete the job details and submit when you're ready.



The **Delete Draft** button is available in each job, if the draft job is no longer needed.

	1	2	З	4	5	6	7	
CREATE COPYING JOB / DETAIL	LS	PRODUCTS Start Job	CUSTOMISE	INSTRUCTION	S DETAILS	CONTACTS	SUBMIT	DELETE DRAFT
Before we gather the speci	ific details of y	our Copying	job, please c	ustomise as r	equired			CUSTOMISE
Number of Items (enter o	one or more) S	ee an examp	le <u>here</u>					
Folders:	5			Bundles:			Other:	
Manila Files:				Plans:				
Boxes:				Discs:				



Courier

Courier jobs can be booked for items to be picked up from one location and delivered to another.

Select COURIER \rightarrow enter courier job details \rightarrow CREATE.



auto-fills your JOTA2® user address.



auto-fills your local TIMG Bureau address.

0						
	Collection Address	A 🖬	Package Details			
	Company Name " Company X		Size Quantity			
	First Name * Charlie	Last Name * Franklin	Satchel Y 1			
	Address Line 1 * 100 George St		Matter/Reference Number			
	Suburb * Parramatta	State* 2150	TEST ONLY			
	Contact Pleons * 295675470	A/H Phone	Invoice			
	Ernal * cfranklin@CompanyX.com					
	Please pick up from reception. Delivery Address	* 🖬	Book Collection Now From			
	Company Name * Company ABC		03/09/2021 11:00 AM			
	First Name * Company	Last Name * ABC				
	Address Line 1* Level 3, 100 Burwood Road		30 mins 1 hour 2 hours 0 4 hours			
	Suburb * BURWOOD	Stata* NSW ❤ 2134	Next day			
	Contact Phone * 02 12345678	A/H Phone * 0412 345 678	Delivery to be completed within the above time window from the date the package is collected			
	Email * bruce@companyABC.com		Expected Delivery			
	Delivery Notes Signature required upon delivery		Delivery expected by Fri Sep 03 2021 15:00:00 GMT+1000			

After TIMG staff accept your Courier job, the barcode(s) will be emailed to the job requestor and collection email address to attach to the item ready for TIMG to pick up.

ATTN:	Receiver TEST Company Z 1 Test Receiver St Receiverland NSW 2000	
Job ID	8927/11 Item 1 o	f 1
Reference	TEST ONLY	
Туре 💛	Document	
8 9	2 7 1 1 - 0 0	1



Buddy Users

A buddy is a JOTA2[®] user who can access your draft and submitted jobs.

You can add one or many buddies, to give them access to your jobs.

• Click on your name.

timg [,] jota₂	CREATE JOB IN\	OICES HELP							HELLO PATRICK MCCOY!	
		1 START ORDER	2 PRODUCTS	3 CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT		
	CREATE JOB								SAVE DRAFT	

• Click Manage Buddies.

timg [,] jota:	CREATE JOB	INVOICES	HELP
	Mana Change	age. e your accour	nt settings
		Passwor External Logir	
	МА	NAGE BUDDIES	

• Click ADD BUDDY → select your buddy → SAVE

BUDDIES A buddy is a JOTA user who is allowed to view your jobs	ADD BUDDY
Jim Jones 🗸 🗙	
	CANCEL SAVE

Your buddy can now access your jobs, including completing draft job details and submitting them.

timg Jota2 Create	E JOB INVOICES HELP			HELLO PATRICK MCCOY! 🕘 LOG OFF
	BUDDIES A buddy is a JOTA user who is allowed to view your jobs		Confirmation buddy has been added	ADD BUDDY 1
	Jim Jones	× 2		
				CANCEL SAVE

After adding a buddy, you can then:

- 1. Add another buddy by selecting **Add Buddy**.
- 2. Remove the buddy by selecting the X and this will remove their access to your jobs.



Manage Account and Password

Click your name on the top right to manage your account details:

- 1. Change your password
- 2. Edit Profile

timg JOTA; CREATE JOB COURIER INVOICES HELP EDISCOVERY		HELLO PATRICK MCCOY!	🖯 LOG OFF
Manage. Change your account settings			
Password: [Change your password]] External Logins: 0			
MANAGE BUDDIES EDIT PROFILE 2			

In Edit Profile you can update the below details then select Update:

- **Correspondence Email** if you would like JOTA2 email notifications to be sent to a different email address, please enter it here.
- Direct Phone number
- Address
- Phone
- Fax

NB: You cannot update the fields which are greyed out. If these details need to be updated, please advise your local Bureau.

timg JOTA2 CREAT	TE JOB COURIER INVOID	ES HELP EDISCOVERY		HELLO	PATRICK MCCOY!
	First Name	Patrick	Street Address 1	110 George St	
	Last Name	МсСоу	Street Address 2		
	Company Name	Company X	Suburb	Sydney	
	Position Title		State	NSW	~
	Email	pmccoy@test.timg.com	Country	Australia	
	Correspondance Email		Post Code	2000	
	Bureau Location	Sydney 🗸	Phone	02 91234567	
	Direct Phone	02 91234567	Fax		
				Cancel	odate



Invoices

- Select INVOICES
- Enter search criteria -> Search
 Invoices can be searched by:
 - 1. Date From & To invoice date range
 - 2. Matter / Reference Number
 - 3. Invoice Number
 - 4. Job ID
 - 5. Invoice Type Standard Invoice or Credit Note
 - 6. Payment Status

Tip: Click the column header to sort the invoices in ascending or descending order.

timg Jota2 Create	і јов 🛛 и	NVOICES HE	ELP EDISCOVE	RY					HELLO POLLY JEN	KINS! 🖯 LOG OFF
	INVOICE	s -	[1	7						
	Date Fi	rom		Date To	Matter / Ref	erence 2				
	Invoice	Number 3]	Job Id 4	Invoice Type	5	Paym ~ All	nent Status 6)	
C	7а 🛃	ulk Download						Clear	Q Search	
		Job Id	Invoice No	Invoice Date	• Total	Туре	Payment	Deleted	Action	
		38	INV400124	01/01/2020	\$187.00	Standard	Unpaid	No	8 🕹 \$ 9	
	7 🛛	38	000001	01/01/2020	\$187.00	Credit Note	Unpaid	No	± \$	
		62	INV400125	31/01/2020	\$125.40	Standard	Unpaid	No	± \$	
	0	87	INV400123	31/01/2020	\$119,614.00	Standard	Unpaid	No	± \$	
		232	INV435408	29/06/2020	\$99.79	Standard	Unpaid	No	± \$	
				First Pr	evious 1 Next Last		Page Size:	10 ~		

- Invoices can be downloaded in:
 - Bulk select the required invoices (7) then Bulk Download (7a) into a zip folder.
 - Individually select the download Action icon (8) for the required invoice.
- To pay an invoice by credit card, select the \$ Action icon (9).



How to Consolidate Invoices

What invoices can be consolidated?

Standard Unpaid Invoices

Step 1: Click on Invoices

timg: Jota2.	CREATE JOB	COURIER	INVOICES	HELP	EDISCOVERY
Step 2: Run the fo	llowina search:				

- Invoice Type = Standard
- Payment Status = Unpaid

Step 3: Click on Search

-	NVOICES			
	Date From	Date To	Matter / Reference	
	Invoice Number	Job Id	Invoice Type Standard Yes Y	Payment Status
				Clear Q Search



Step 4: Click on the tick box and select multiple invoices and then click the consolidate button.

Note: Different users from the same account can consolidate invoices.

A bcc email will get sent to our finance team when a consolidated invoice is created so they can reconcile all the individual invoice notes.

Invoice Type Payment Status						
	Invoice Type		ob Id	Jo	Number	nvoice
Standard Y Unpaid	Standard					
Clear Q Search				Sconsolidate	ilk Download	🛓 Bu
Date Total Type O Payment Deleted Action	e Date To	Invoice	Owner Name	Invoice No	Job Id	
2022 \$4,301.00 Standard Unpaid No 去 🖥 🔊 💲	/2022 \$4,30	02/02/2	Patrick McCoy	SHALE_CS100168	1161	
2022 \$110.00 Standard Unpaid No 去 🖥 🔊 🕯	/2022 \$11	19/05/2	Patrick McCoy	SHALE_TEST001259	1259	
2022 \$146.00 Standard Unpaid No 🛃 🖥 🔊 \$	/2022 \$14	23/05/2	Patrick McCoy	SHALE_TEST001189	1189	
2022 \$154.00 Standard Unpaid No 去 🖥 🔊 \$	/2022 \$15	23/05/2	Patrick McCoy	SHALE_TEST001157	1157	
2022 \$220.00 Standard Unpaid No 去 🖥 🔊 \$	/2022 \$220	24/05/2	Fran Family	SHALE_TEST001288	1288	
2022 \$275.00 Standard Unpaid No 去 🖥 🔊 🕯	/2022 \$27	24/05/2	Fran Family	SHALE_TEST001286	1286	
2022 \$110.00 Standard Unpaid No 🛓 🖥 🄊 \$	/2022 \$110	08/06/2	Patrick McCoy	1334	1334	
2022 \$220.00 Standard Unpaid No ± 2022 \$275.00 Standard Unpaid No ±	/2022 \$221 /2022 \$27!	24/05/2	, Fran Family Fran Family	SHALE_TEST001288	1288 1286	

Step 5: The Consolidated Invoice will download in your web browser.

https://jota.timg.com	© 2022 - TIMG		
Consolidated(1).pdf	SI	how all	×



Step 6: Search for All Unpaid invoices and select the dollar sign to make the payment.

Note: Consolidated invoices are be given a new invoice number.

ate Fr	rom	Da	ate To	Matter / Reference					
voice	Number	ol	b Id	Invoice Type			Payment Status		
				All)	Unpaid		
🛓 Bu	ılk Download	Consolidate						Clear	Q , Search
	Job Id	Invoice No	Owner Name	Invoice Date	Total	Туре 🗿	Payment	Deleted	Action
		SHALE_CS100169	Patrick McCoy	02/08/2022	\$256.00	Consolidated	Unpaid	No	* 6
	1161	SHALE_CS100168	Patrick McCoy	02/02/2022	\$4,301.00	Standard	Unpaid	No	± 6 9 9
	1259	SHALE_TEST001259	Patrick McCoy	19/05/2022	\$110.00	Standard	Unpaid	No	± 6 9 9
	1189	SHALE_TEST001189	Patrick McCoy	23/05/2022	\$146.00	Standard	Unpaid	No	± 6 9 \$
	1157	SHALE_TEST001157	Patrick McCoy	23/05/2022	\$154.00	Standard	Unpaid	No	± 1 D \$
	1288	SHALE_TEST001288	Fran Family	24/05/2022	\$220.00	Standard	Unpaid	No	🕹 🛅 🖱 🤮
	1286	SHALE_TEST001286	Fran Family	24/05/2022	\$275.00	Standard	Unpaid	No	🕹 🛅 🗇 🤮
	1334	1334	Patrick McCoy	08/06/2022	\$110.00	Standard	Unpaid	No	± 6 9 9
			First Previous	Next Last		Page Size:	10 ~		

Step 7: Add the email address you want to have the proof of payment to go to. Note: The payment portal will be updated with the invoice total from the consolidated

invoice if you click on the correct link.

Invoice Details	
Invoice Number	Invoice Total
SHALE_CS100169	\$256.00
Email Address	
pmccoy@test.timg.com	
Additional Recipients Email	
NOTE: To issue a receipt to multiple email addres	sses separate with ';'
Card Details	
Card Details	
Credit card surcharges apply: Visa/Master Card 1	
American Express 2.25%	5 paymonts can be made using a credit card within
the duration of 24 hours.	payments can be made using a credit card within
	5 payments can be made using a credit card within



Glossary

Job Page

Job ID - Your Job ID is a unique number generated by JOTA2[®] each time you create a job. If you need support, we recommend quoting this number during your communication with TIMG staff to ensure we can help you in a timely manner.

Job Status - As your job moves through production the Status will be updated from "Logged" to "Scoped" to "Being Prepared / Processed / Finished / QAed", and finally to "Completed". You can always monitor the status of your job in your JOTA2® account.

Сору

General Photocopying - Select this option when you require the entire hard copy contents of a box or file to be photocopied.

Tagged Document Copying - Select this option when you require tagged pages or documents to be photocopied.

Paginated Copying - Select this option when you require pages or documents to be numbered and then photocopied.

Scan

General Scanning - Select this option when you require hard copy document(s) to be scanned and converted to a PDF or JPEG.

Discovery Scanning - Select this option when you need documents to be scanned in accordance with a Discover Protocol for exchange.

Print

General Office Printing - Select this option when you require a document or email to be printed.

Marketing and Commercial Document Printing - Select this option if you have general marketing material to be printed. This may include brochures, presentations, invitations, seminar handouts, books or business cards. This also includes any Graphic Design work that involves your documents being altered to complete your project.



Briefs, Appeal Books & Court Books

Counsel Brief/Brief to Advise - Select this option when you have an indexed or tabbed brief to be prepared/printed.

Court Book/Tender Bundle - Select this option when you have a Court Book or Tender Bundle to be prepared/printed.

Appeal Book - Select this option if your job requires preparation, formatting and printing of Appeal books for all appropriate courts.

Legal Technology Solutions

Process Electronic Documents - Select this option if your job requires electronic processing. This would include Ingestion, DeNISTing, Deduping and Metadata Extraction for upload to a review platform.

Process Hardcopy Documents - Select this option if your job requires hardcopy documents to be processed such as scanning, delimiting and coding for upload to a review platform.

Other Copying & Support Services

Binding - Select this option if your job requires binding only.

Trolley Hire - Select this option if your job requires a trolley to transport documents in the CBD.

Tab Dividers - Select this option if your job requires numbering, alphabetising (A-Z), or custom printed 5 or 10 tab dividers.

CD / DVD Duplication - Select this option if your job requires a CD or DVD to be duplicated.

Laminating - Select this option if your job requires laminating only.

Court Courier Service - Select this option if your job requires people and trolleys to transport documents to and from Court.

