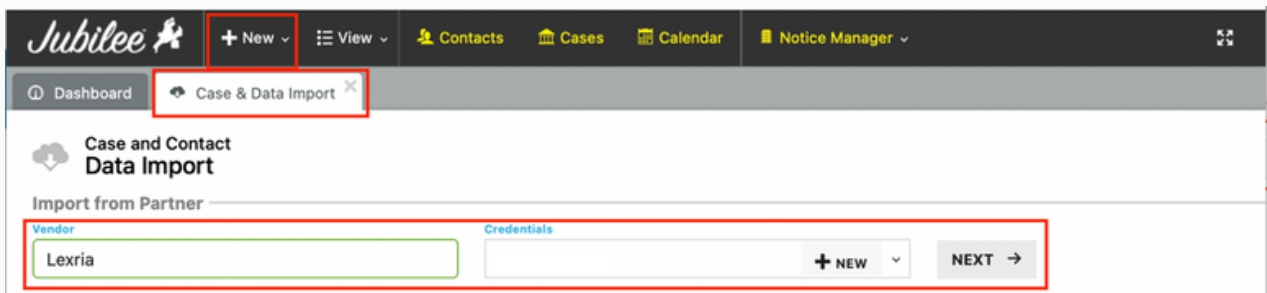


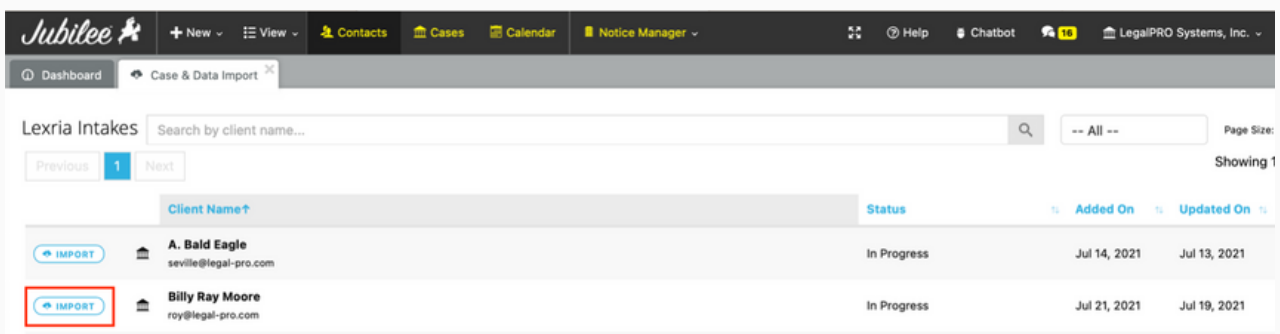
# Getting Started with the Jubilee/Lexria Integration

## How it works

1. Once your account with Lexria has been established, you can now import Lexria cases directly into Jubilee. From within Jubilee, go to New on the top toolbar – Case & Data Import. You will need to select Lexria from the vendor list then click on the Next button.



2. The following page will display a list of all your Lexria cases, and you can click on the Import button to download the case into Jubilee.



3. On the import page, you have the option to create a new Jubilee case file or import the data into an existing Jubilee case file. You may want to choose the 2nd option if you have already started entering some case information within Jubilee while the debtor was working on the Lexria intake. There are also options near the bottom to include/exclude certain information from the import but Jubilee defaults to include all.

The screenshot shows the Jubilee software interface for linking and importing Lexria matter data. The page title is "Link & Import Lexria Matter to Jubilee" for the case of "Billy Ray Moore".

**Link to:** New Case (highlighted in red) Existing Case

**Bankruptcy Details:** Chapter: Chapter 7, Type of Debtor: Joint

**Client:** Debtor: Moore, Billy Ray; First Name: Billy; Last Name: Ray; Social Security Number: Enter number; Date of Birth: 07/04/1970

**Case Information:** Firm Office Location: San Antonio Office; Workflow Step: -- Select One --; Case Status: Open; Projected Filing Date: [Calendar icon]

**Jurisdiction:** State: Florida; District: Middle District of Florida; Division: Fort Myers Division

**Select data to import:**  Assets  Debts  Income  Expenses  SOFA  Businesses (Coming Soon)  Documents

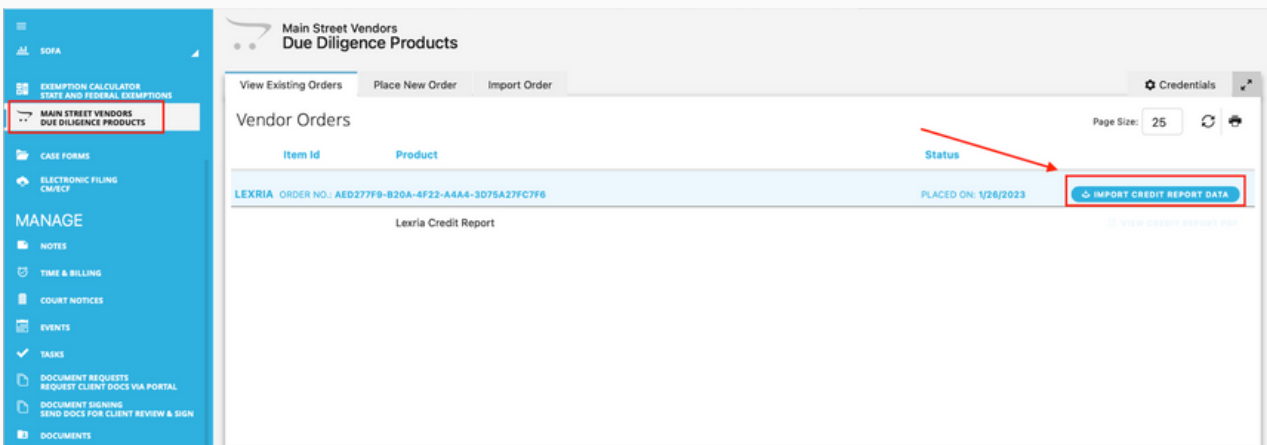
**Import options:**  Consolidate Common Assets  Add Creditors to Master Contact List

Buttons: Import, Cancel

# Working with Credit Reports imported from Lexria

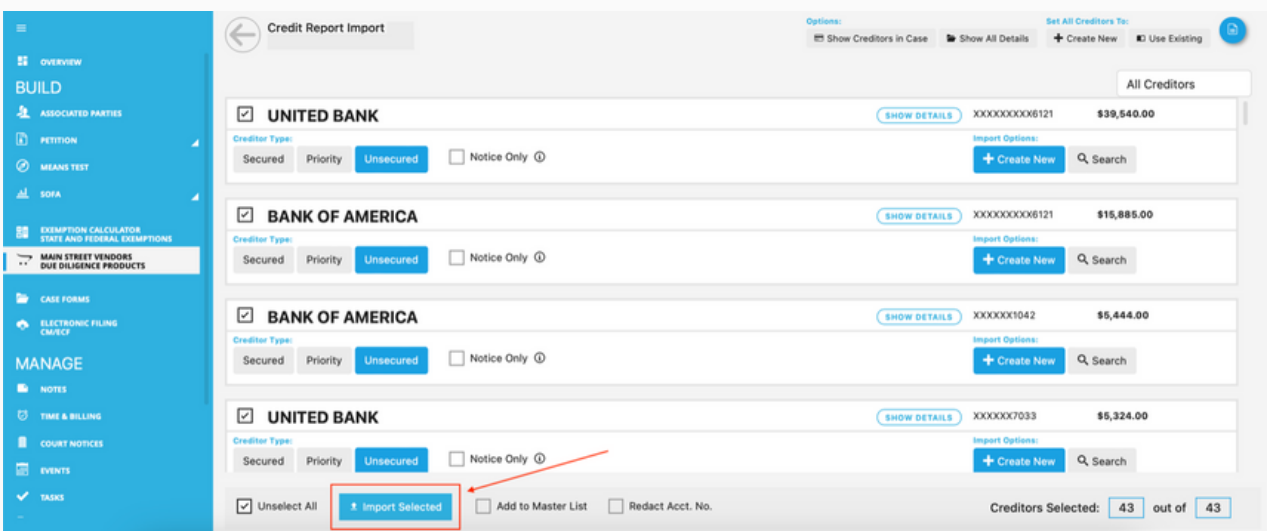
## How it works

1. If the debtor ordered a credit report within the Lexria intake process, that credit report will be available within Jubilee on the Main Street Vendors – View Existing Orders page. From that page, you will have an option for “Import Credit Report Data”.



2. 1. On the Credit Report Import page, you can select the checkboxes next to the creditor names of the creditors you would like to import then click on the “Import Selected” button. This will transfer the creditor information directly to the Schedules.

**Note:** There is also drop down in the top right-hand corner (labeled “All Creditors”) where you can filter on only creditors that have balances greater than \$0.00.



# Frequently Asked Questions:

## **1- What do I do if the IMPORT button is not next to my client?**

The import button becomes available automatically in Jubilee once the debtor has completed the intake process in Lexria.

## **2- What if I want my client to keep working on their Intake and I've already imported it into Jubilee?**

You can import the data from Lexria into Jubilee multiple times. When you select the Import option on the Case Import page you will have an option to import the data and create a New Jubilee case file or you can import the data into an Existing Case file. If using the "Existing Case" option, you may want to edit some of the checkboxes near the bottom of the page to pick and choose which sections of data you want to import to prevent duplicates.

## **3- Does Jubilee import individual creditor information off the Lexria credit report?**

Yes, you are able to go into Main Street Vendors – View Existing Orders page within the case in Jubilee and select the individual creditors you'd like to import into Schedules D, E/F.

## **4- Does Jubilee import the individual pay stub detail from the pay stubs retrieved in Lexria?**

No, unfortunately at this time individual pay stub detail is not automatically imported into Jubilee. The pay stubs themselves, if retrieved in Lexria, can be found in the Documents section once imported into Jubilee.

## **5- Does Jubilee import the individual financial account information from the financial account statements retrieved in Lexria?**

No, unfortunately at this time individual financial account detail is not automatically imported into Jubilee. The financial account statements themselves, if retrieved in Lexria, can be found in the Documents section once imported into Jubilee.

## **6- What happens if I re-open the Lexria Intake after I've already imported some information into Jubilee?**

You will need to resubmit the Intake in Lexria, and then go through the import process again in Jubilee. You will be able to select individual sections you'd like to import, so you don't have to import the entire Intake all over again.