Capitalise II - installing, registering and linking accounts

Installing *Capitalise II*

Note that each licence allows the application to be installed on one device and for one online account (accessed at www.capitalise.classlegal.com) to be created.

Using the link and download code in the email, download and install the Windows or Mac version of the application.

Registering *Capitalise II* as a stand-alone user

If you are running the application as a stand-alone user, and you won't be linking your account to anyone else's:

1. Run the application and click to *Register new account*:

2. Fill in all the fields here, including entering your registration key.
3. You're now ready to start using *Capitalise II.*
4. When you're away from your desk, access your account online by going to www.capitalise.classlegal.com and entering your email address and password (or your Windows or Mac user name and password if you're using *TurboFloat* – see below).

Registering *Capitalise II* for multiple users and then linking the accounts (standard *TurboActivate* licensing system)

These instructions apply to the majority of sites with multiple users.

A. Setting up as a primary or admin user for a group
1. Run the application and click to *Register new account.*
2. Fill in the fields there:
    a. If you are an admin user only, and don't have a licence to use the application, leave the *Registration key (to register account)* field blank.
    b. If you will be using the full application, do enter your registration key here.
3. Each user needs their own account - either create these accounts online on their behalf (by going to www.capitalise.classlegal.com and repeating steps 1. and 2. b. for each user) or ask the users to do it themselves on their installed versions.
4. When you're away from your desk, access your account online by going to www.capitalise.classlegal.com and entering your email address and password.

B. Setting up a group so accounts can be linked and cases shared
1. Click on *Group* on the top right to create your group:
    a. Enter your organisation's name.
    b. Select if cases should belong to the organisation (most usual) or to individual users – see the help screen for more information.
    c. **DO NOT** tick the *TurboFloat* box.
    d. Click *Save settings.*
2. A group has now been created (with you as the group admin) and other users can be added.
3. Enter the email address of individuals that you would like to add and click *Invite*.

C. Additional users in a group of linked accounts
1. If the primary or admin user hasn't already set up your account, do so by running the application and following the instructions A. 1., and 2b. above.
2. If you have been invited to a group click on the bell icon on the top right and then on *Group invitations…*
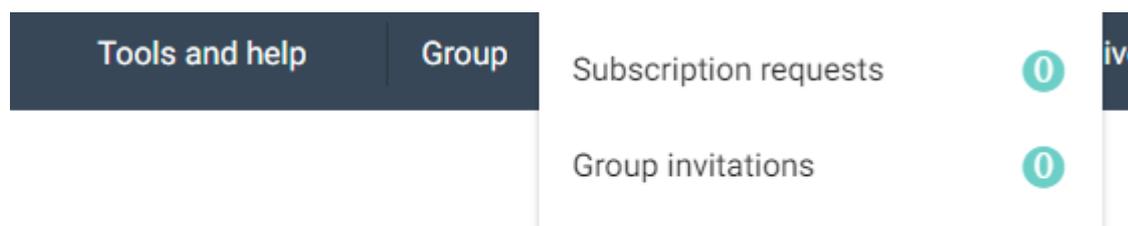
      … and then tick to 'Join'.
3. When you're away from your desk, access your account online by going to www.capitalise.classlegal.com and entering your email address and password.

Registering *Capitalise II* for multiple users then linking the accounts (*TurboFloat* licencing system)

These instructions are only for the minority of users who are using our *TurboFloat* licensing system.

A. Activating the console and then activating the floating licence for each device
1. Get a list of each computer's Windows or Mac user name (contact us if you need help with this) and email this list to info@classlegal.com.
2. The helpdesk will then email you with your firm's registration key, and confirm that your users are registered.
3. If you haven't already downloaded and installed *Capitalise II,* do so now.
4. Go to the application folder and run 'ClassConsoleSetup.exe'.
5. Follow the instructions in the *Class Console* document (www.classlegalupdate.co.uk/ClassConsole.pdf and then come back here).

B. Setting up as a primary or admin user for the a group
1. Run the application and click to *Register new account.*
2. Fill in the fields there, <u>entering your Windows or Mac user name in the 'Full name' field and ignoring the registration key field.</u>
3. Each user needs their own account - either create these accounts online on their behalf (by going to www.capitalise.classlegal.com and repeating steps 1. and 2. above for each user) or ask the users to do it themselves on their installed versions.
4. Click on *Group* on the top right to create your group:
   a. Enter your organisation's name.
   b. Select if cases should belong to the organisation (most usual) or to individual users – see the help screen for more info if needed.
   c. Tick the *TurboFloat* box and enter your registration key and IP address, which can be found in the *Class Console* (see www.classlegalupdate.co.uk/ClassConsole.pdf).
   d. Click *Save settings*.
5. A group has now been created, with you as the group admin, and other users can now be added.
6. Enter the email address of individuals that you would like to add to the group and click *Invite*.
7. When you're away from your desk, access your account online by going to www.capitalise.classlegal.com and entering your email address and password.

C. Additional users in a group of linked accounts
1. If the primary or admin user hasn't already set up your account, do so by running the application and following steps B. 1. and 2. above.
2. Click on the bell icon on the top right and then on *Group invitations*…
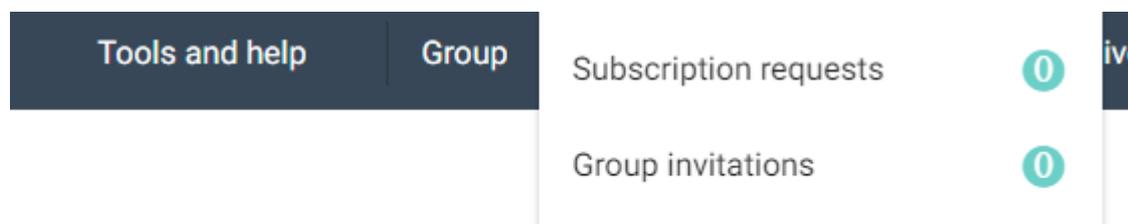
   … and then tick to 'Join'.
4. When you're away from your desk, access your account online by going to www.capitalise.classlegal.com and entering your email address and password.