

## LSA Export App

### Overview

The LSA Export App is a LEAP Partner add-in designed to swiftly generate the year-end reports package required by the Law Society of Alberta.

The app provides users the functionality to generate reports individually or in bulk, save results to an Admin Matter, as well as to save locally on their PCs. Once these reports are generated, the user can now successfully upload the reports to the portal for year-end submission.

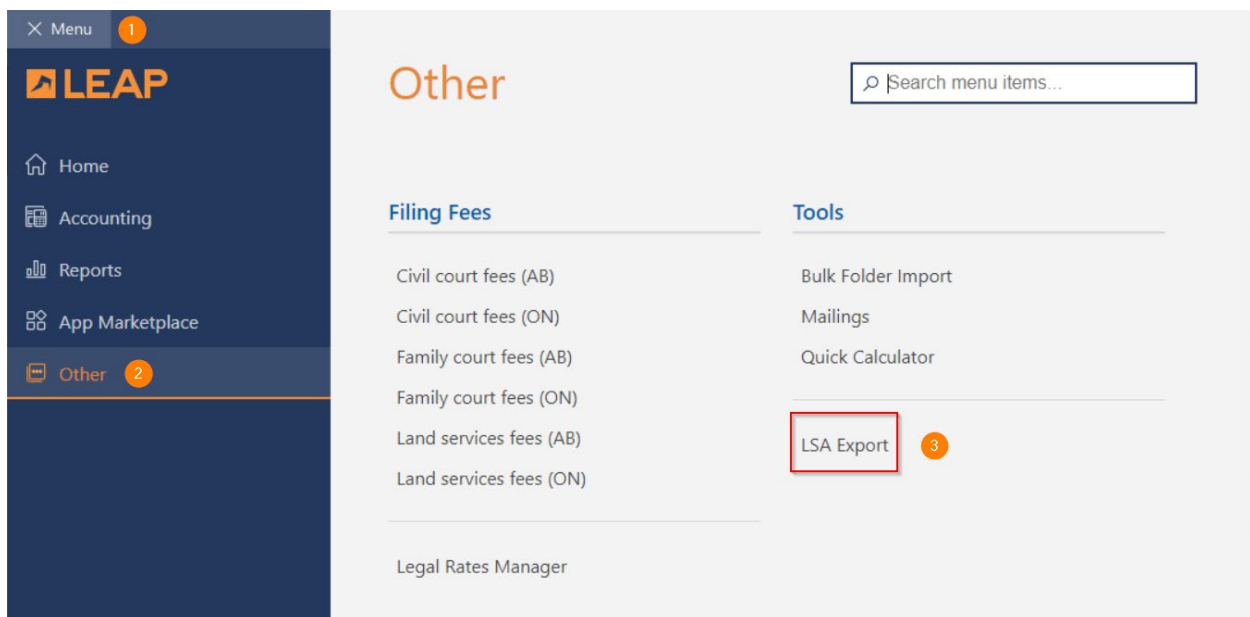
### Configuration

- 1) Enable the App from the Marketplace
  - a. Select the LEAP Menu > App Marketplace
    - i. A list of available apps will be displayed
    - ii. Click Enable to activate the LSA Export App on the individual user's account

### Location of the App following Installation

The LSA Export app is now available within the Global Menu option, within the Other tab.

- 1) Select Menu
- 2) Select Other
- 3) Select LSA Export to launch the App



## LSA Export Settings

Prior to generating the reports, ensure to finalize the configurations for the date range and default Admin Matter.

- 1) Admin Matter
  - a. Enter the matter name/number to set the default file location in LEAP
- 2) Fiscal year start and end dates:
  - a. The app automatically defaults to Jan 01 and Dec 31 of the current year.
  - b. You may manually update the date range if necessary

### Settings ×

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Admin Matter:

LSA2 Smith, Purchase 1

Fiscal year start: 01/01/2021 2 Fiscal year end: 31/12/2021

Save

## Report Generation

- 1) Select the reports you wish to generate (use *select all* to generate all reports in bulk)
- 2) Select Save to PC or Save to Admin Matter

LSA Export Settings

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**Available Reports**

For the Fiscal Year: 01/01/2021 to 31/12/2021

- Select All
- Accounts Receivable Summary (AL)
- Billing Journal (BAR)
- Client Trust Ledgers (TL)
- Trust Transactions (TT)

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1 2

Save to PC Save to Admin Matter

- 3) A window will display to communicate the reports are in preparation. Users can minimize the application and continue working within LEAP until the reports are generated.

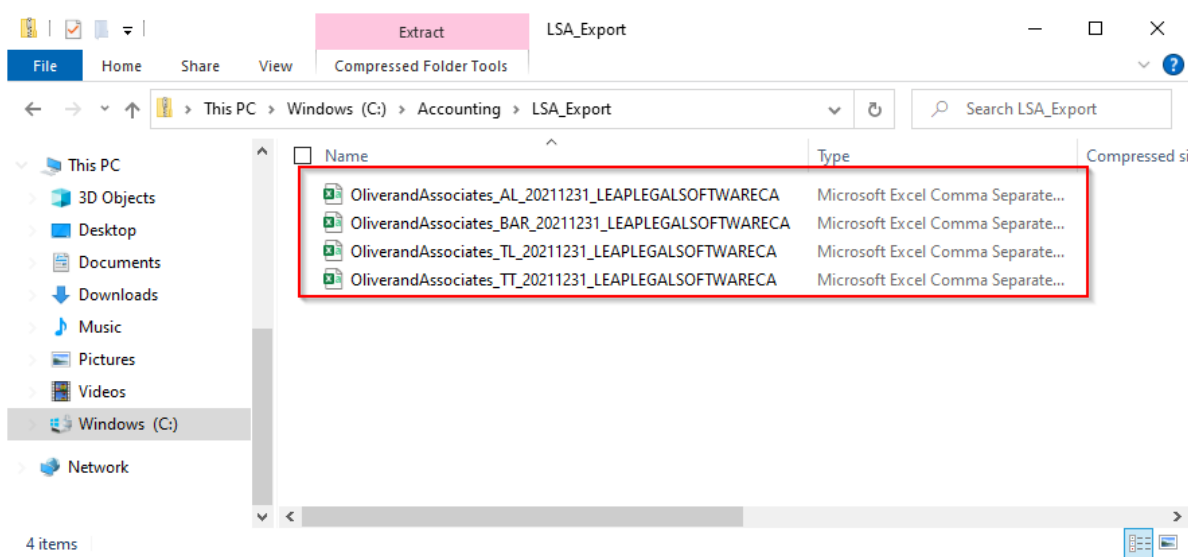
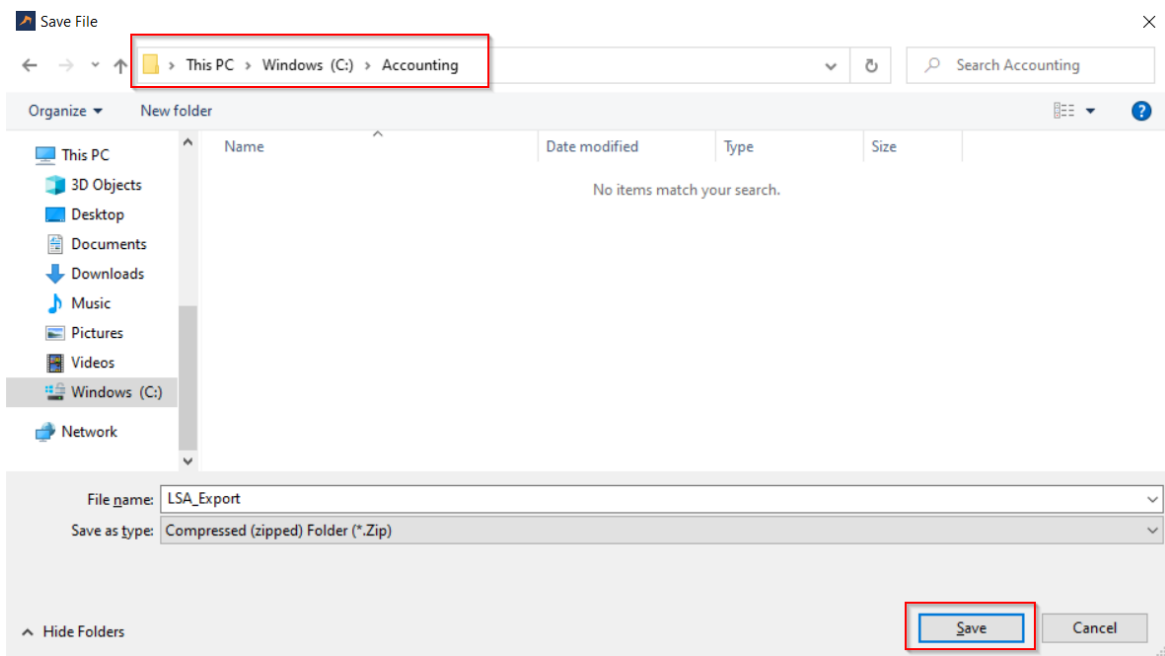
## Preparing Reports

⌄ Preparing Accounts Receivable Summary (AL) Report, please wait...

## Save to PC or Save to Admin Matter

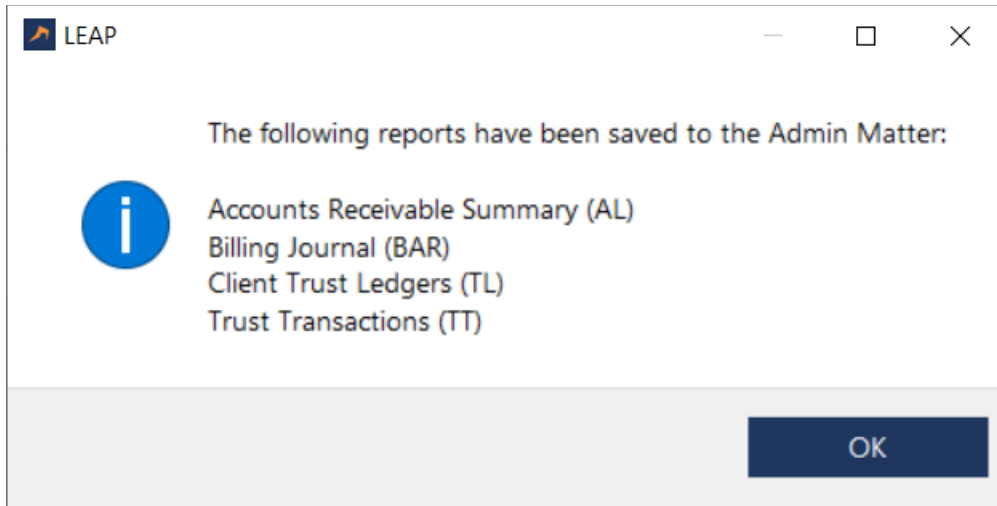
**Save to PC:** Saves the report to the user's local drive/designated shared drive location

- 1) The file explorer is populated, the user can now set the desired location (e.g., an accounting folder on the C-Drive)
- 2) A .Zip file named "LSA Export" is created when generating multiple reports at once



**Save to Admin Matter:** saves reports to default Admin Matter within LEAP

- 1) Once the reports are generated, a window will populate to confirm the following reports have been saved successfully to the Admin Matter.



- 2) Navigate to the Admin Matter to locate the applicable reports

DETAILS

LSA2

Scott Oliver

Mr. John Smith

Purchaser

Matter type

Purchase

Vendor

Property

Compliance

Transaction details

Purchaser's real estate brokerage

Land titles office

Land surveyor

Lender

Home insurance company

Mortgage default insurance company

Canada mortgage and housing corpora

Mortgage broker

Canada revenue agency

CORRESPONDENCE

IN PROGRESS

Search correspondence

TYPE	ITEM	STAFF	CREATED
	OliverandAssociates_TT_20211231_LEAPLEGALSFTWARECA.csv	SO	12:37 PM
	OliverandAssociates_TL_20211231_LEAPLEGALSFTWARECA.csv	SO	12:37 PM
	OliverandAssociates_BAR_20211231_LEAPLEGALSFTWARECA.csv	SO	12:37 PM
	OliverandAssociates_AI_20211231_LEAPLEGALSFTWARECA.csv	SO	12:37 PM

**Submission to Portal**

Once saved to the desired location, the report(s) are now ready to be submitted via the PwC Connect Tool to the Law Society of Alberta.