

**QUINTALINK**



Soluno Account Setup

Soluno integration set up.

The first step is to add a new user to your Soluno account, this user will act an operational user for your firm and will not contribute to your active licenses.

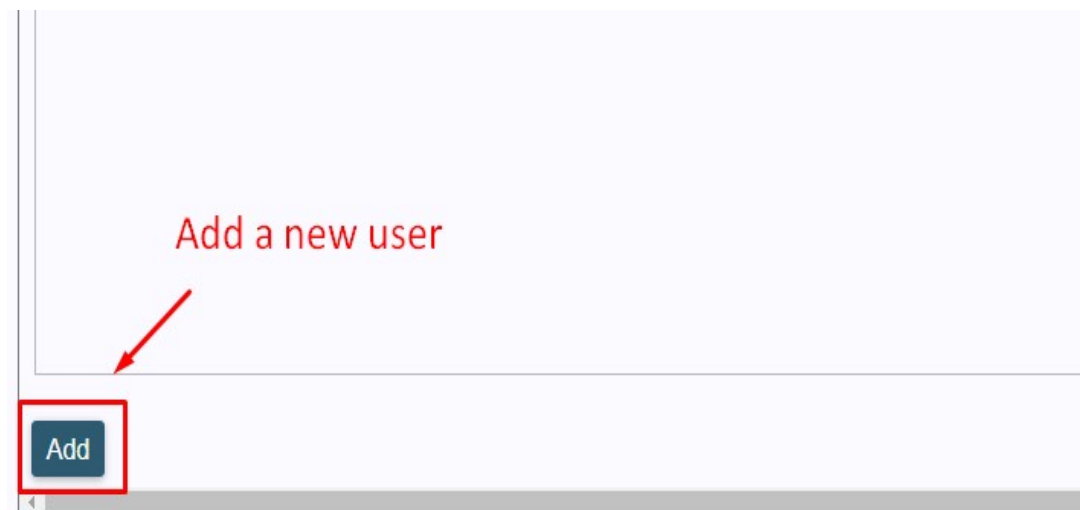
1. Login to your existing Soluno administrator account, by visiting:  
<https://cloud.soluno.legal/main.cshtml#!/Logon>



2. Once you have logged in select the cog icon in the top right corner



3. Select "Add" at the bottom to add a new user



4. Fill out the initials, email/logon, first and last name for this user and save at the bottom.  
\*Note in our sample we have added exclamation points at the beginning and end of the initials, this is not required but is recommended so you are able to differentiate the operational user.

Firm **Users** Contact/Casettle Billing Rates/Codes

**Users** Groups Security Connected Users Locked Out Users

### New User Setup: !QL!

To begin adding a new user to your firm, fill in the following fields.

Initials  
IQL!

Email/Logon  
support@quintalink.ca

Mobile Phone

First Name:  
Support

Last Name:  
Quintalink

Department

Job Title 1

Job Title 2

Job Title 3

Employee Number

Administrator

Cancel Back **Next**

5. Create a password for the user and ensure that all settings are disabled except for the password never expires. Select next at the bottom.

**Users** Groups Security Connected Users Locked Out Users

### New User Setup: !QL!

Set up a new password for the user.

Passwords need to meet the following criteria:

- Minimum of 8 characters
- Include at least 3 of the following 4 elements:
  - One UPPER CASE letter
  - One lower case letter
  - One special character
  - One number

Password  
..... ✓

Confirm Password  
..... ✓

Force password change on next logon

Password never expires

Disable 'Keep me logged in'

Disable user (they will not have access to the system until they are manually enabled)

Show in help

6. Ensure that Records times is disabled. Select Next

cloud.soluno.legal/main.cshtml#/Admin

Lexchain Software Ltd. (Quintalink) MS

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Firm **Users** Contact/Casefile Billing Rates/Codes

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### New User Setup: !QL!

If the user is a lawyer, enter their information below.

Records Time

GL Account Extension  
!QL!

Current Goal	Amount	Hour
No Budget	0.00	0:00

Operating Account

Trust Account

Cancel Back **Next**

7. Save the client. You do not need to enter anything under the registration details for the user.

8. Select the Pencil icon next to your newly created user.

Firm **Users** Contact/Casefile Billing Rates/Codes

**Users** Groups Security Connected Users Locked Out Users

Initials	Full Name	Job Title	Records Time	Member of	Disabled	2FA Enabled
IDS1	Support Account		X	Admin	<input checked="" type="checkbox"/> Hide	
IQL1	Support Quintalink		X	Admin		

- Under the groups tab, remove the "Power User" group from your user.

## User Editor: !QL!

User Profile **Groups** Security Accounting Associations Payables

Select the group(s) this user belongs to.

Groups are generally used for security, but notifications and other features may leverage membership.

Available Groups:

Admin

Member Of Groups:

Power User



Save

Cancel

Add the admin group, and save.

User Profile Groups Security Accounting Associations Payables

Select the group(s) this user belongs to.  
Groups are generally used for security, but notifications and other features may leverage membership.

Available Groups:      Member Of Groups:

Admin	➔	
Power User	➜	

Save      Cancel

10. Log out of your administrator soluno account and login as the new user that you have created. Once you have logged in, you will be instructed to create a security question and password for your account. Set a question and password.
11. Confirm that your firm file settings are set up to “Default” Billing Group, “HST” Tax Group, “Standard” Rate Group, and “Default” File Group

Firm Users Contact/Casefile Billing Rates/Codes

Settings General Ledger Accounts Bank Accounts Areas of Practice Department Codes Service Configuration

Firm Features File Banking Provincial

Defaults			
Billing Group	Tax Group	Rate Group	File Group
default	hst	standard	default

Charge Hold

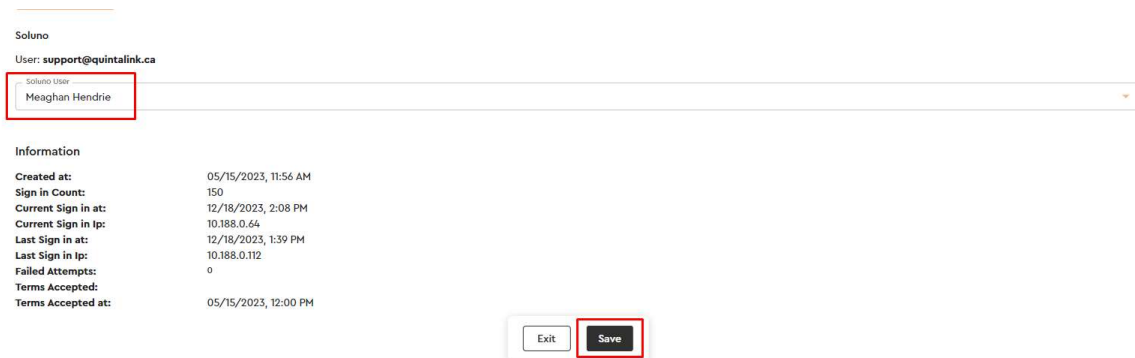
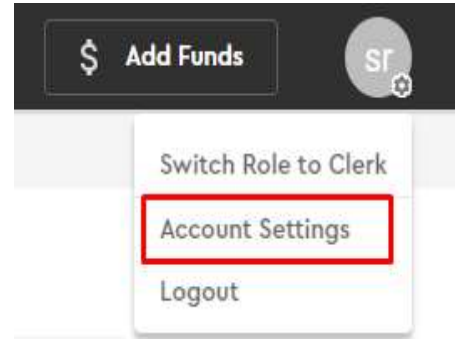
Second Step is to link your Soluno account with your Quintalink account

1. Login to your Quintalink account. Ensure that your account is set to “administrator” role.

\*Note – if you have a gear icon in front of your initials you are set to admin role.



2. Hover over your initials and select “Account Settings”
3. Scroll to the bottom of your account settings and select “Login Soluno”. Enter the login details for your newly created operational account. This will act as your sole firm login connecting your Soluno software to Quintalink.
4. Have each solicitor login to their Quintalink account and assign their Soluno user to their Quintalink User. They can do this by hovering over their initials in the top right corner and selecting “Account Settings”, they will then scroll to the bottom and select their name from the drop down menu under the Soluno heading. Don't forget to save.



Your Quintalink Account is now integrated to your Soluno account and ready to use!