# **Arctrieval**

Arctrieval <> Smokeball Integration Setup Guide

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## 1. Introduction

Arctrieval is a unique software-based approach to obtaining, managing, and accessing medical records, billing information, and imaging studies for legal professionals. Smokeball is a leading case management system law firms use to manage their business.

Arctrieval's integration with Smokeball is a testament to our commitment to our mutual customers. This integration offers enhanced functionality and features that improve your workflow and enhance the user experience, ultimately making your work more efficient and effective.

## 2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

- 1. Client Information
  - a. Import Smokeball Contact information for a Client into an Arctrieval Client record through the Arctrieval Add Client process. One Client is added from Smokeball to Arctrieval at a time.
  - b. Pull updated Smokeball Contact information for a Client into the Arctrieval Client record through the Arctrieval Client Activity Update From Smokeball process. Client information is updated in Arctrieval one Client at a time.
  - c. Push updated Arctrieval Client information from Arctrieval Client records to Smokeball Contact information for a Client through the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted to update the Smokeball Contact information for the Client.
  - d. Link an existing Arctrieval Client record with an existing Smokeball Contact information for a Client.
  - e. Remove the link between a Smokeball Contact for a Client and the Arctrieval Client record. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 2. Business/Organization Contact Information (Arctrieval Contact)
  - a. Import Smokeball Business/Organization information (Medical Provider) into an Arctrieval Contact record through the Arctrieval Add Contact process. Each Business/Organization is added from Smokeball to an Arctrieval Contact one at a time.
  - Pull updated Business/Organization information (Medical Provider) information into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Smokeball process. Contact is updated in Arctrieval one at a time.
  - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to Business/Organization in Smokeball through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted to update the Business/Organization information in Smokeball.
  - d. Link existing Arctrieval Contact record with an existing Business/Organization in Smokeball.
  - e. Remove the link between Smokeball Business/Organization and the Arctrieval Contact record. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 3. Link Arctrieval Request to an existing Smokeball Matter
  - a. When the request is sent through Arctrieval, the User selects a Smokeball Matter, and Arctrieval automatically links it to the Smokeball Matter.
  - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing Smokeball Matter.
- 4. Unlink Arctrieval Request from an existing Smokeball Matter

- a. Remove the link between the Smokeball Matter and the Arctrieval Request. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 5. Data synchronization between Arctrieval and Smokeball
  - a. Arctrieval creates an Arctrieval folder on the Documents tab when a request is issued or linked.
  - b. Within the Arctrieval folder:
    - i. Each Arctrieval request activity is stored in a subfolder with the request ID, the facility's name, and the type of request (medical, billing, or imaging).
    - ii. All documents related to the request are stored in the request folder.
  - c. Arctrieval creates and maintains a Memo for each request.
  - d. All documents created or uploaded in Arctrieval are uploaded to the designated request document folder in Smokeball.

## 3. Document Change History

Date	Document	Description of Changes
	Revision	
5/15/2025	1.0	Initial Document.

## 4. Integration Setup

#### 4.1. Overview

To enable Smokeball and Arctrieval to communicate and exchange data, the following must occur:

- 1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Smokeball integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
- 2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your Smokeball Account to establish the link with Arctrieval.

#### 4.2. Establishing the Link Between Smokeball and Arctrieval

Once the Smokeball and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.

= Arctrieval	Smokehouse and Banks	(Smokeball)				Sam Sme	okehouse ~ @HELP
A Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations
Clients						ENAB	LE SMOKEBALL INTEGRATION
Record Requests	SMOKEBALL INTEG	RATION					
Contacts	Integration has not be	en setup. Press the Enab	le Smokeball Integration bu	tton to start the integration with	Smokeball.	/	
Reports							
Forms							
Settings							

Clicking the Enable Smokeball Integration button will redirect you to the Smokeball application, where you must approve Arctrieval's access to your Smokeball account, as shown in the image.



If the Smokeball Integration is active in your Arctrieval account, the Arctrieval Matter tab is removed from the left-hand menu to avoid user confusion.

If you have not been previously authorized in the	
current browser, you must	SMOKEBALL
enter your email and	Sign in with your username and password
password to access	Usemame
Smokeball.	jvishney@arctrieval.com
	Password
	Sign in
_	

After allowing Arctrieval access to your Smokeball account you are redirected back to Arctrieval. If Arctrieval successfully established the connection with Smokeball you will see the following message.

= Arctrieval Smo	okehouse and Banks (Smokeball)		Sam	Smokehouse ~ @HELP
者 Dashboard	Users Account	Plan and Billing Disbursement Account	Document Types Document Template	s Integrations
Clients			TEST SMOKEBALL INTEGRATION	ISABLE SMOKEBALL INTEGRATION
Record Requests	SMOKEBALL INTEGRATION			
Contacts	Last Updated On:	05/12/2025		
Reports	Expiration Date Of Current Authorization:	05/12/2026		
Forms				
Settings	Smokeball Integratic	on Setup	×	
	Smokebail integration setup was	successful. Connection to the Smokeball account was est	CLOSE	
D 2025 Arctrieval I All Rights Reserved				

## 5. Authorization Renewal

The connection with Smokeball is valid for one year. To continue the integration, it is necessary to update the authorization data in a timely manner by repeating all the steps described above. The date on which your current Smokeball authorization is shown in the details on the Integrations tab.

≡ <mark>Arc</mark> trieval Sm	okehouse and Banks (Smokeball)					Samianakahouse	Sam Smokehouse ~ 🛛	HELP
n Dashboard	Users Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
La Clients						TEST SMOKEBALL INTEGRATION	DISABLE SMOKEBALL INTEGR	RATION
Record Requests	SMOKEBALL INTEGRATION							
Contacts	Last Updated On:	05/12/2025						
Reports	Expiration Date Of Current Authorization:	05/12/2026						
Forms								
Settings		/						

Arctrieval will notify you that your authorization is about to expire with the following reminders.

### 5.1. System Notification

Within 15 days before your current authorization expires, you will see the following message when you access Arctrieval.



#### **5.2. Email Notification**

An email is sent to all of the Arctrieval firm administrators informing them that their current Smokeball authorization will soon expire. These emails are sent 30, 15, and 1 day before the expiration date. An example email is shown.



## 5.3. Updating Smokeball Authorization

To update Smokeball authorization data, your firm's administrator needs to go to the Integrations tab on the Settings page. There you will see an additional message that the authorization is about to expire and a button to refresh the authorization data.

A Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations
Clients					TEST SMOK	EBALL INTEGRATION	DISABLE SMOKEBALL INTEGRATION
Record Requests	SMOKEBALL INTEGR	ATION					
Contacts	Last Updated On:		05/06/20	24			
Reports	Expiration Date Of Curre	nt Authorization:	05/06/20	25			
Forms	Synchronization with Sn	nokeball will stop short!	y because the previous aut	norization expires in 7 days.			
Settings	To continue the integrat	ion with Smokeball, plea	ase authorize with your Sm	okeball account again:			
	REFRESH SMOKEE	ALL INTEGRATION	~				

By clicking the Refresh Smokeball Integration button, you will need to re-enter your Smokeball user data. Once the connection to Smokeball has been successfully established, the authorization expiration date will be updated to one year from the date the authorization data was updated.

If the authorization is not updated, all synchronization between Smokeball and Arctrieval will stop when the current Smokeball authorization expires. Users will be notified that the approval has expired.

Arctrieval System Notification	×
Synchronization with Smokeball has stopped because the previous authorizati Smokeball, please go to the Integration tab of the Settings page and reauthoriz Enable Smokeball Integration button.	on expired. To resume integration with e your Smokeball account by clicking the

Firm administrators will receive an email stating that the Smokeball authorization has expired and requires user data to be updated for the integration to work again.

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## 6. Integration Testing

To verify the Smokeball integration settings, click the Test Smokeball Integration button as shown.

≡ Arctrieval Sm	okehouse and Banks (Smo	okeball)						Sam Smokehouse ~	@HELP
n Dashboard	Üsers	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
21 Clients							TEST SMOKEBALL INTEGRATION	DISABLE SMOKEBALL	NTEGRATION
Record Requests	SMOKEBALL INTEGRATIO	ON				/	1		
Contacts	Last Updated On:		05/12/202	25		1			
Reports	Expiration Date Of Current Au	uthorization:	05/12/202	26		/			
Forms									
Settings									

Arctrieval will attempt to verify the connection.

#### 6.1. Connection Verified

If the connection is established, the following message is displayed.

Smokeball Link Status	×
Smokeball link was verified. Connection to the Smokeball account was established.	
	CLOSE

## 7. Disable Smokeball Integration

To disable the Arctrieval integration with Arctrieval, click on the Disable Smokeball integration button to display the Disable Smokeball Integration dialogue box as shown.

= Arctrieval Smo	okehouse and Banks (Si	mokeball)				Sam Sm	okehouse ~ ⑦HELP
A Dashboard	Users	Account	Plan and Billing	D)sbursement Account	Document Types	Document Templates	Integrations
21 Clients					TEST SMOKEBALL	INTEGRATION	BLE SMOKEBALL INTEGRATION
Record Requests	SMOKEBALL INTEGRA	TION					
Contacts	Last Updated On:		05/12/202	5		/	
Reports	Expiration Date Of Current	Authorization:	05/12/2020	5			
Forms	Disable	Smokeball Ir	ntegration			×	
	Are you sur integration To disable s	e you want to remove between Smokeball a Smokeball Integratior	the link to Smokeball from A and Arctrieval. 9, type the word disable:	rctrieval? Removing the Smol	CANCEL	DISABLE	
to 2025 Arctineval I All Bojnis Reserve	a				1		

Enter "disable" to proceed and press the Disable button, as shown below.

